Grants & Benefits with Citizen Portal for Free School Meals - Implementation Package

Professional Services

mri education

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Introduction

Eligibility for Free School Meals is more than a funded lunch for a child. It opens entitlement to additional funding to support their education within the school. It is a key indicator of social deprivation for the Local authority.

The Grants and Benefits module is the foundation for the Citizen Portal for Free School Meals. Implementing both modules together makes perfect sense to getting the maximum benefit from your investment in time and resources.

Overall using the Grants and Benefits with Citizen Portal:

- Improves the experience for parent, because they can get an immediate response
- The quality of the data submitted integrates with the MRI Education system
- This maximizes potential Pupil Premium Funding for schools
- Reduces costs of communicating with parents, because changes to status of applications can be shared via the Citizen Portal
- Claims can auto import into the Grants and Benefits module

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Benefits

The Citizen Portal and MRI Education Grants and Benefits are fully integrated. As families use the portal, once the once a parent is matched or added, there is no need for local authority teams to manually add applications, streamlining the management of claims. Freeing up resources to be invested where they have the greatest impact, which is supporting parents who fail the validation of their eligibility.

This package provides your Grants and Benefits team with a streamlined project to work to, efficiently implement this both modules as a single project.

- We start by listening and understanding your local challenges so we appreciate how you can get the best out of the software.
- Scoping your requirements to configure your Test environment to suit your needs to support including, customisation of text, UAT testing, to going live with confidence.
- Configure your test system to support training and your own user acceptance testing, so you have a smooth experience.
- Provide training so you can confidently test, and build you experience of how the integration of this public facing application works with your processes.
- Help to set the live environment up so you are ready for parents to apply online, and feel confident that you can maintain and adapt to challenges parents present.
- Finally, we don’t abandon you once you go live. We follow up to review how you are managing importing applications and readiness to publish offers.

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Pre-requisites

To enable us to provide a quality service, the following engagement be required from the Local Authority:

- Have the Bases module
- Install the licence key into test and do an IIreset before Session 1
- Remote access for MRI Education Technical to install and configure web components
- Access to participate in Microsoft Teams sessions for support and configuration by the knowledge specialist
- MRI Education database at the current version or previous version
- Have a test environment that has been refreshed withing the last academic year
- Have are started ECS accreditation for connection to the MRI Education system to the DWP ECS checker
- Email service configured for MRI Education
- File upload configure for MRI Education
- Appropriate access to all Clients for the Knowledge Specialist

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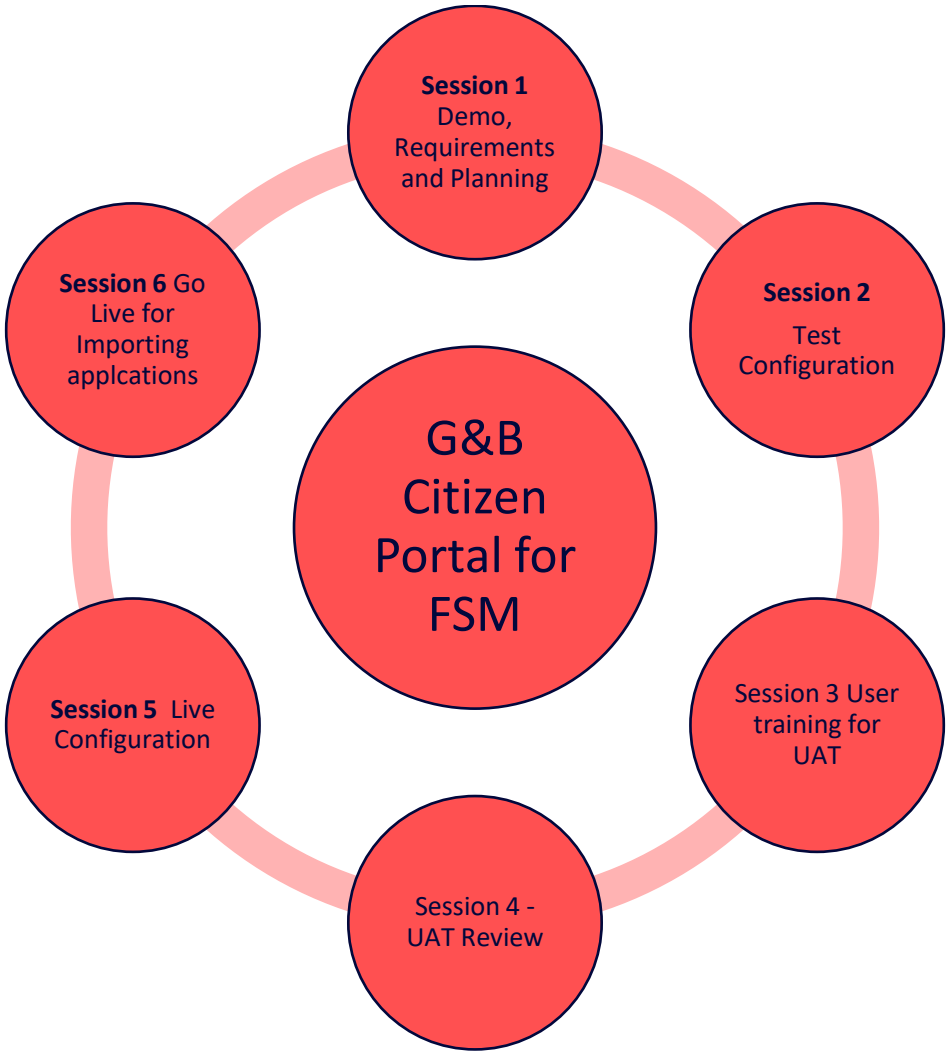
Service Overview

We will assist in the successful implementation of the Citizen Portal with Grants and benefits Free School Meals by providing the following:



We believe in a strong emphasis on a proactive partnership with the customer. The MRI Education Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The MRI Education Project Coordinator is the coordinating MRI staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

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Service Details

Session 1: Project Launch

Key Prerequisites (full list provided in RAID log)	• Access to a workstation with full access to MRI Education Test, with system admin rights for V4 Client, V4 Online for Grants and Benefits and the Citizen Portal
Objectives	• Review the scope of the software and for all parties to understand how they will benefit, and what the challenges maybe. • Identify time and resources needed to support the implementation
Audience	• IT Support – to check and review technical environment. • Free School Meal Managers to understand their service needs. • Support – impact on MRI Education and reporting and support
Standard Agenda	• Demonstrate the module for a Parent, and integration with the Grants and Benefits module. • Review the RAID log and Technical Pre-requisites, allowing for IT support to understand how The Citizen Portal integrates if this is the first module to be used in the Citizen Portal. • Review the requirements for the business process to support applications, parents, and schools. • Test access to the Test environment to check for any missing configuration that will delay successful set up of the Test environment.
Outcomes	• All parties have a mutual understanding of the scope of the software, the service requirements, and resources needed. • Test environment is ready for setup and configuration

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Session 2: Configuration of Test

Key Prerequisites (full list provided in RAID log)	• Key contact for the Knowledge Specialist to contact who has full systems access to the V4 Client, Online Client, and access to Crystal or permissions to run reports
Objectives	• Set up the Test Environment • Skim test it works form Parent application to import into the MRI Education
Audience	• MRI Education coordinator or Key contact with full access to MRI Education • Admissions team lead be available for any key questions • IT support be available to contact for IIsrests if required
Standard Agenda	• Configure Grants and Benefits module and Bases • Configure the Citizen Portal for Free School Meals • Skim test – Registration, Application, importing the claim
Outcomes	• Test system is working end to end, ready for training

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Session 3: User Training for UAT

Key Prerequisites (full list provided in RAID log)	• Key contact for the Knowledge Specialist to contact who has full systems access to the V4 Client, Online Client, and access to Crystal or permissions to run reports • If emails are not active in test users will been to register as parents prior to the session to allow for accounts to be activated, users may also prefer to you're a non-work email account to test access from outside the office.
Objectives	• Understand the parents experience • Know how to match and process applications • Manual Applications – how to add and check • Searching and updating claims • Module Admin for G&B • Have a clear view of what they want to Test during acceptance testing
Audience	• MRI Education coordinator or Key contact with full access to MRI Education • Grants and Benefits team
Standard Agenda	• Registration and orientation within the Citizen Portal • Making an application • Matching and importing – how it works and behaviours • Finding and manging parent enquires • Adding manual claims • Searching and updating claims • Batch Update routines • Module Admin for Grants and Benefits • Module Setup in the Citizen Portal
Outcomes	• The Grants and Benefits team are confident to test

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	• Feel confident to invite other colleagues to make parent applications • Commit to testing

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Session 4: User acceptance review

Key Prerequisites (full list provided in RAID log)	• Key contact for the Knowledge Specialist to contact who has full systems access to the V4 Client, Online Client, and access to Crystal or permissions to run reports • Able participate in MS Teams meetings • Have a log of queries ready for the meeting
Objectives	• Review the UAT log • Check the knowledge gained from Training • Confirm and agree text changes to the Live environment
Audience	• MRI Education coordinator or Key contact with full access to MRI Education • Grants and Benefits team
Standard Agenda	• Registration and orientation within the Citizen Portal • Making an application • Matching and importing – how it works and behaviours • Finding and manging parent enquires • Messages to Parents • Navigation around Grants and Benefits • Check Technical Pre-requites for Live
Outcomes	• Confidence to go live

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Session 5: Configuration of Live

Key Prerequisites (full list provided in RAID log)	• Key contact for the Knowledge Specialist to contact who has full systems access to the V4 Client, Online Client, and access to Crystal or permissions to run reports
Objectives	• Set up the Live Environment • Skim test it works form Parent application to import into the MRI Education
Audience	• MRI Education coordinator or Key contact with full access to MRI Education • Admissions team lead be available for any key questions • IT support be available to contact for IIreset if required
Standard Agenda	• Configure Grants and Benefits, Bases and V4 Client for permissions and lookup codes • Configure the Citizen Portal for Free School Meals • Skim test – Registration, Application, Process in the Back Office
Outcomes	• Live system is working end to end, ready for the public. Note once setup the Module can be switch off, until the official launch.

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Session 6: Post Go Live Applications

Key Prerequisites (full list provided in RAID log)	• Key contact for the Knowledge Specialist to contact who has full systems access to the V4 Client, Online Client, and access to Crystal or permissions to run reports • Able participate in MS Teams meetings •
Objectives	• Review applications made by the public • Answer any queries the Grants and Benefits team for supporting parents •
Audience	• MRI Education coordinator or Key contact with full access to MRI Education • Grants and Benefits team •
Standard Agenda	• FSM applications and enquiries • Matching and processing conflicts • Checking for anomalies • Working with Claims within the module •
Outcomes	• The team are confident they are handling applications correctly •

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Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
Reporting for FSM E-applications (On site / Off Site) Reports to support submitted applications to aid checking, queries and processing. Management information reporting for KPI's **Benefits** Reporting off the Online tables is a new area and can be complex to navigate. We have experience of understanding the tables and business process to help your support yor key performance indicators **Cost:**	1	LIST CUSTOMER AUDIENCE
Reporting for FSM via Schools Portal (On site / Off Site) – subject to new functionality planned for 3.72 summer release If you have the A&T module and the Provider Portal for School Places new functionality planned this summer will open the options for schools to report on Free Schools Meals in the MRI Education System. **Benefits** Complete the circle of the business process give schools access to self service their own Free School Meal lists for children with claims and those linked to their school making applications		

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