G&B Refresher for the End of Transaction Protection Workshop

Professional Services

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Contents

Introducing Our New Consultancy and Training Refresher for Free School Meals Claims

Transitional protection for free school meals was introduced in England on **1 April 2018**. This protection ensures that any pupil eligible for free school meals before this date, or who becomes eligible during the rollout of Universal Credit, will retain their eligibility until **31 March 2025**

For our Grants and Benefits and FSM Portal customers it has been 7 years since claims had to be reviewed for eligibility periodically after applying. The knowledge of how to use the bulk checking and batch updating claims is possibly lost.

We are excited to announce the launch of our new consultancy and training workshop. This is designed to help you seamlessly adopt a new process for managing free school meals claims with and without Transition Protection.

You will need to start to differentiate between claims that retain their Transitional Protection until the child moves to another phase of education, and claims made after the 1st April 2025 that will need to be routinely rechecked. This means a new process and additional communication with parents and schools.

Key Changes and Challenges:

- **New Process Adoption:** You will need to implement regular rechecking of claims, ensuring ongoing eligibility.

- **Increased Workload:** This change will result in an increase in administrative tasks and require more frequent communication with parents and schools.

- **Enhanced Communication:** Regular updates and clear communication channels will be essential to manage the new process effectively.

Benefits of Our Training:

Our consultancy and training service is here to ensure that you are fully prepared and ready to adopt these important changes. Let us help you navigate this transition with ease and confidence.
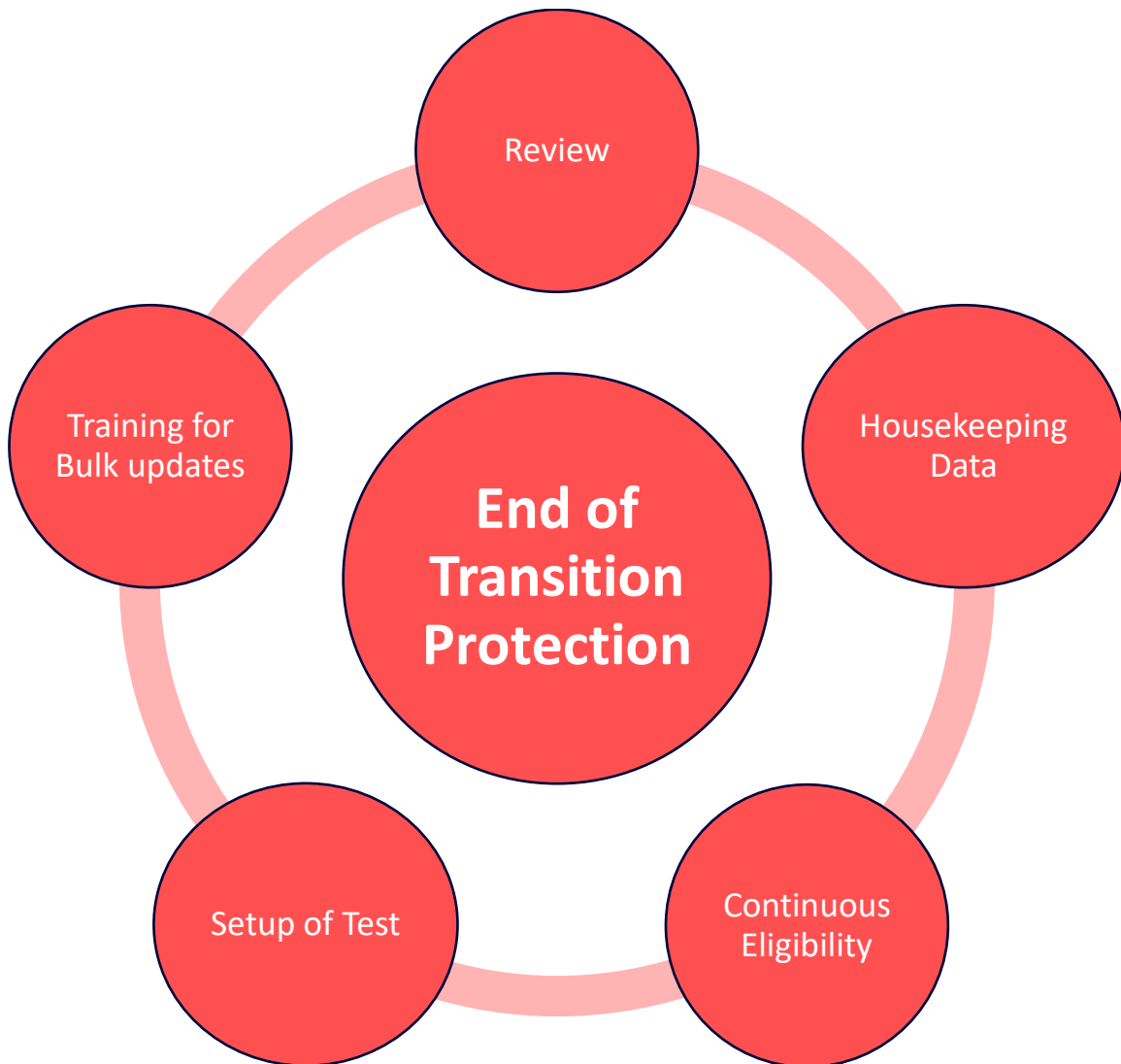
- **Preparedness:** Our comprehensive training program will equip your staff with the knowledge and skills needed to smoothly transition to the new process.

- **Efficiency:** By understanding the new system thoroughly, your team will be able to handle the increased workload more efficiently.

- **Confidence:** With our support, your staff will feel confident in managing the new eligibility checks and communicating effectively with parents and schools.

Pre-requisites

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

- Grants and Benefits module

- Optional modules – Free School Meals portal

- One database at the current version or previous version

- Appropriate access to all One Clients for the Knowledge Specialist including the Test Environment.

- G&B Student implemented

Service Overview

The objective of this session is to:

- Review how you manage Free School Meals

- Check if existing claims need to be updated, for example change end dates for children with Transition Protection

- Workshop together you approach to managing claims post Transition Protection

- Set up Test for training to give you a test base for checking your new processes

- Training of ECS update bulk update

- Training for Batch Process routines

Service Details

Agenda for Post Transition Protection Workshop

Review for current settings

Objective: understand how you have set up your claims and communicate with parents and schools

- Status codes and processes for manging claims

- Current data and end date

- ECS connectivity within Grants and Benefits

- Version of One

- How you communicate with Schools

Housekeeping of data for the end of Transition protection

Objective: Look at the end dates of your Transitional Protected claims and in Test decide and test the approach to bulk update them

- Updating End dates on claims (3.84) on test to agree approach

Post Transition Protection

Objective: Training and plan your approach for managing Continuous Review claims

- Overview of continuous eligibility

- Mapping out your codes and process

- Grace period

- Frequency of checking

- Communication with parents

- Communication with schools

- Setting up Test for Transition Protection

- Defaults for Dates

- New Status Codes

Training on Test

Objectives:
- Training and testing of the bulk update routines to gain confidence and agree and document how you are going to use the bulk routines

- Action plan for User Acceptance testing

- Changes needed for communication with schools and parents

- Batch upload to ECS

- Processing updates

- Batch updating claims

- Communication to Parents

- Portal pages and messages templates

- Communication to Schools

- Reporting to schools

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
G&B for new users **Benefits** New users of G&B for supporting parents and schools **Cost:**	1	End Users of Grants and Benefits
Schools Portal – Option 1 Set up the portal to allow the schools to run a current Free schools list	1	One Support
Schools Portal – Option 3 Install and edit 3 reports for Free school meals with the FSM Portal • Full List • Changes to FSM's – On's and Off's • Applicants made by parents • Alert to prompt school to check their list	1.5	One Support and G&B Users
FSM Portal Implementation • Overview • Configuration of test • User training • UAT • Sign off test • Configuration of live • UAT • Post Go Live Support • Sign off live • Go Live	5	One Support and G&B Users
FSM Portal Dashboard		