

Provider Portal Reporting Tool

Professional Services



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Introducing the Provider Portal Reporting Tool

Are you tired of the endless cycle of generating reports, managing spreadsheets, and sending countless emails to schools? We understand the challenges faced by local education authorities in efficiently managing and distributing data. That's why we've developed the Provider Portal Reporting Tool; a simple solution designed to streamline your reporting process and enhance communication with schools.

What we offer:

- Centralised Reporting: Say goodbye to scattered reports and spreadsheets. With the Provider Portal Reporting Tool, all your data is hosted securely, and users have access to generate reports relevant to their school or service.
- Self-Service Access: Schools or services can now log in securely to their accounts and access
 the reports they need, whenever they need them. No more waiting for emails or dealing with
 multiple lists from different teams.
- Efficiency and Accuracy: By consolidating your reporting process, the Provider Portal Reporting Tool reduces errors and ensures that school's access accurate and up-to-date information.
- **Enhanced Communication:** Improve your communication with schools by providing them with a single point of access for all their data needs.

Why Choose Provider Portal Reporting Tool

Transform the way you manage and distribute data with Provider Portal Reporting

- **Timesaving:** Free up valuable time for your team by eliminating the need to manually send reports and manage spreadsheets.
- **User-Friendly:** Our intuitive interface makes it easy for schools to find and download the reports they need.
- **Secure:** We prioritise data security, ensuring that all information is protected and accessible only to authorised users.
- Scalable: Whether you're managing data for a module or the whole suite, Provider Portal Reporting Tool scales to meet your needs. We provide some starter reports, you can then add your own in



How does it work?

With the licence key, and giving portal users permission, they can access a repository of Crystal reports. The reports run by passing their base_id, linked to their Provider Portal account.

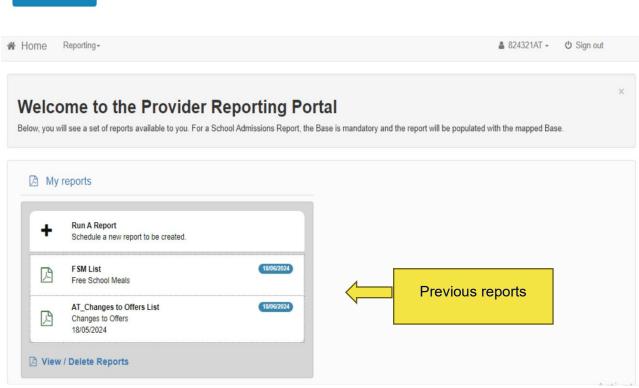
The portal users can choose the output for the report and download their data. In addition to this you can use additional parameters for the report user to use.



Portal User – How does it work?

1. There is a new Reporting when the log into the portal

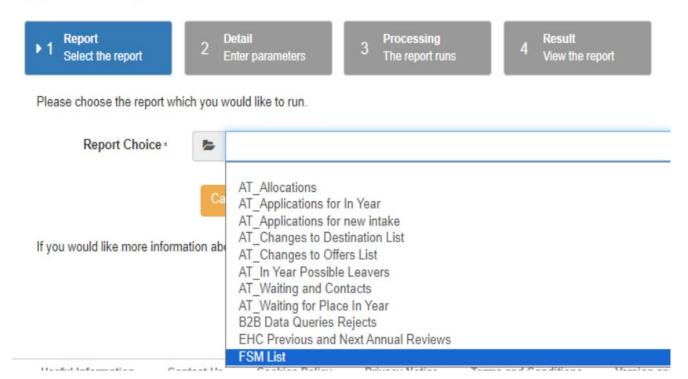






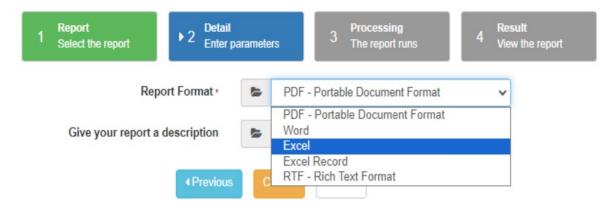
2. Run a new Report – Select the report from Report Choice.

Run a Report



3. Select the Report Format

Report Parameters - FSM List





4. Run the report

Report Queued - FSM List



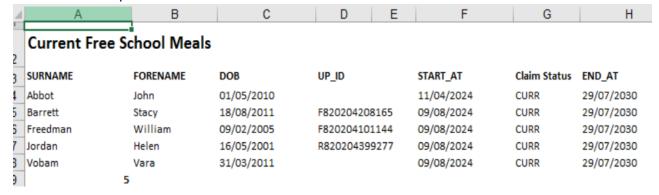
Please wait while the report is being processed, this may take some time. You may leave this page at any time, the report will continue running and can be seen in your 'My Reports' area.



5. Access/View the report



6. Download and open





Our Service Options

Option 1: Entry

Help to setup your live and test environments with a sample template report for proof of concept and testing. In the session we will discuss how the reports should be structured, suggest ways you can broaden the access to data, and roll out to school users

Included:

- · License key
- Setup in Live and Test
- One template report to get you started (see option 2 for choices)
- Testing of report
- · Training for managing users and permissions



Option 2: Startup with Templates

Option 2 is the same as Option 1, but with 4 further template reports. With these reports you can address options to broaden the value to schools and your users across a range of modules that need to share data with schools.

Included:

- · License key
- Setup in Live and Test
- 5 template reports to get you started
- Testing of report
- Training for managing users and permissions

Starter Template Reports

Module	Report	Benefits
Grants and Benefits	Grants and Benefits - FSM List	 School can generate any time they need it Saves time generating and emailing lists to schools
B2B	Rejection Messages	 Share rejected UPN changes Reinforce good data standards for core student data
SEN (IDP Wales)	Special Needs Register	 Schools can check their data accuracy with your data Encourages school and the SEN team to share key information
Governors	Current Governors	Self Service governor appointments and positions
CSS	Open Involvements	Children registered to their school with an open involvement and key contact
Admissions	Changes to Allocations	Let schools list the changes to offers to their school after the offer date to support the pupil inductions



Module	Report	Benefits
Children Employment	Register of Work Permits	Schedule of work permits issued to children
Children in Entertainment	Register of Licences	Schedule of children with an entertainment licence issued



Option 3: Process Solution Pack

For customers who have a wider ambition for digital transformation we have solutions targeted at key processes.

The reports used by schools can support parameters, include user defined fields and be tailored to restrict access to data if schools are not subscribed to a local service level agreement.

We have the following solution options:

Free School Meals Portal

3 Template reports:

All Free Schools meals
Applications for free schools' meals and the checker results
Changes to FSM – since a parameter date

- Alert for school users to have reminders to review their new and removed FSMs
- 1 day's report writing for tweaks and making the reports sensitive to user and school SLA's
- School user guide

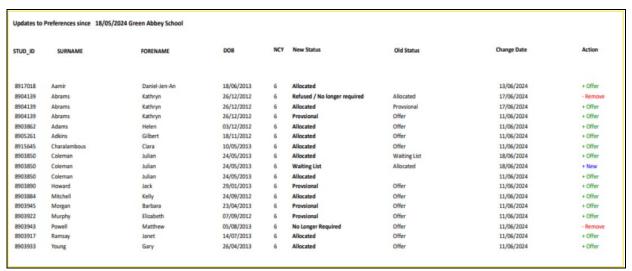


Admissions Support Pack for In Year and Main Round

5 Template reports:

Changes to Offers
In Year waiting list that cover the current and future Transfer Groups
Full application download
Changes to Destination
In-Year applications potential leavers

- Alert for school users to have reminders to review their new inyear applications
- 1 day's report writing to tweak and make the reports sensitive to user and school SLA's
- · School process note

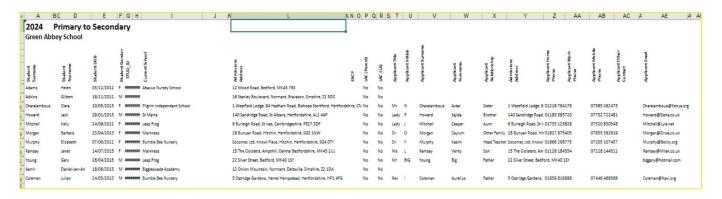


Schools can run this report after National Offer day and review the changes to offers previously made.

- They are prompted for a date to view the changes since any point in time
- This Saves time emailing schools about children who are no longer attending next September, or new starters to include into their planning



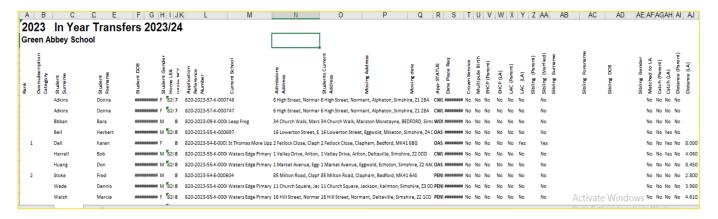
Admissions – Allocations



- Schools can run this report after offer date, and it includes the child's current school and separate fields for applicant details
- Schools can access the list of current allocations, this report offers the data in separate fields



Admissions – In Year Applications



- · Download all In Year applications across active transfer groups
- The columns include all the Applicant and LA details, this mitigates the risk of the school not including a column on their Portal pages



Admissions – Waiting for a place In Year

Waiting list not available. Schools Admissions are managing your waiting list on your behalf

- Download all In Year applications across active transfer groups that are awaiting a place
- The columns include all the Applicant and LA details, this mitigates the risk of the school not including a column on their Portal pages
- If Admissions are managing waiting lists the school cannot access the list



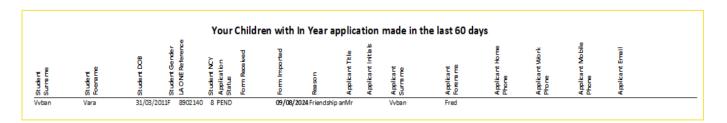
Admissions – Changes to Destination List

Changes to Destination School since 01/04/2024 Waters Edge Pimary School (p4mt)							
STUD_ID	SURNAME	FORENAME	NCY	DOB	Allocated Base	Last Updated	
8904139	Abrams	Kathryn	6	26/12/2012	Applegreen School	17/06/2024	

• Perfect for the Primary school to see changes in allocation for their top year group to see if any children have had a change in allocation.



Admissions - In Year Possible Leavers



Not all parents communicate with their school about their intention to move mid-year. This report lets
a school query if any of their registered children have made an application to the Local Authority



Coming soon...

Youth Destination of Leavers



Want to know more?

Contact your account manager for further details relating to this.

The Provider Portal Reporting Tool is available, with starter reports you can gain immediate benefits, and use it as a springboard to improve communications with schools.

You can edit the sample reports, develop you own using these as examples, or contact Professional Services to commission new reports to suit your needs.

