



# Provider Portal Reporting Tool

Professional Services

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# Contents

<b>Contents .....</b>	<b>2</b>
<b>Introducing the Provider Portal Reporting Tool .....</b>	<b>3</b>
What we offer: .....	3
Why Choose Provider Portal Reporting Tool.....	3
How does it work? .....	4
Portal User – How does it work? .....	5
<b>Our Service Options .....</b>	<b>8</b>
Option 1: Entry .....	8
Option 2: Startup with Templates .....	9
Starter Template Reports .....	9
Option 3: Process Solution Pack .....	11
Free School Meals Portal .....	11
Admissions Support Pack for In Year and Main Round.....	12
Admissions – Allocations.....	13
Admissions – In Year Applications .....	14
Admissions – Waiting for a place In Year.....	15
Admissions – Changes to Destination List .....	16
Coming soon.....	18
<b>What to know more? .....</b>	<b>19</b>

# 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

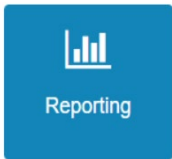
## How does it work?

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



The screenshot shows the user interface of the Provider Reporting Portal. At the top, there is a navigation bar with "Home" and "Reporting" on the left, and a user profile "824321AT" and "Sign out" on the right. Below the navigation bar is a welcome message: "Welcome to the Provider Reporting Portal" with a sub-message: "Below, you will see a set of reports available to you. For a School Admissions Report, the Base is mandatory and the report will be populated with the mapped Base." The main content area is titled "My reports" and contains a list of report options:

- Run A Report**: Schedule a new report to be created.
- FSM List**: Free School Meals (dated 18/06/2024)
- AT\_Changes to Offers List**: Changes to Offers (dated 18/05/2024)

At the bottom of the report list, there is a link for "View / Delete Reports". A yellow callout box with the text "Previous reports" and a left-pointing arrow is positioned to the right of the report list, pointing towards the "AT\_Changes to Offers List" report.

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

### Run a Report

Progress bar with four steps:

- 1 Report Select the report (Active)
- 2 Detail Enter parameters
- 3 Processing The report runs
- 4 Result View the report

Please choose the report which you would like to run.

Report Choice \*

If you would like more information about...

- AT\_Allocations
- AT\_Applications for In Year
- AT\_Applications for new intake
- AT\_Changes to Destination List
- AT\_Changes to Offers List
- AT\_In Year Possible Leavers
- AT\_Waiting and Contacts
- AT\_Waiting for Place In Year
- B2B Data Queries Rejects
- EHC Previous and Next Annual Reviews
- FSM List**

3. Select the Report Format

### Report Parameters - FSM List

Progress bar with four steps:

- 1 Report Select the report
- 2 Detail Enter parameters (Active)
- 3 Processing The report runs
- 4 Result View the report

Report Format \*

Give your report a description

- PDF - Portable Document Format
- Word
- Excel**
- Excel Record
- RTF - Rich Text Format

[Previous](#) [Next](#)

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.

Processing Status ▼



Report Submitted: Today 10:11

Run Status: The report is in a queue for processing at position : 1

Summary of the submitted report ▼

Report Chosen: FSM List


Description: Free School Meals

Ac

Go

5. Access/View the report

Processing Status ▼



Report Submitted: Today 10:11

Run Status: The report ran at 09/08/2024 10:11:14

Summary of the submitted report ▼

Report Chosen: FSM List

Description: Free School Meals

[← Previous](#) [Home](#) [View Report](#)

[Remove Report](#)

6. Download and open

	A	B	C	D	E	F	G	H
1	<b>Current Free School Meals</b>							
2								
3	<b>SURNAME</b>	<b>FORENAME</b>	<b>DOB</b>	<b>UP_ID</b>	<b>START_AT</b>	<b>Claim Status</b>	<b>END_AT</b>	
4	Abbot	John	01/05/2010		11/04/2024	CURR	29/07/2030	
5	Barrett	Stacy	18/08/2011	F820204208165	09/08/2024	CURR	29/07/2030	
6	Freedman	William	09/02/2005	F820204101144	09/08/2024	CURR	29/07/2030	
7	Jordan	Helen	16/05/2001	R820204399277	09/08/2024	CURR	29/07/2030	
8	Vobam	Vara	31/03/2011		09/08/2024	CURR	29/07/2030	
9		5						



# 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
<b>Grants and Benefits</b>	<b>Grants and Benefits - FSM List</b>	<ul style="list-style-type: none"> <li>• School can generate any time they need it</li> <li>• Saves time generating and emailing lists to schools</li> </ul>
<b>B2B</b>	<b>Rejection Messages</b>	<ul style="list-style-type: none"> <li>• Share rejected UPN changes</li> <li>• Reinforce good data standards for core student data</li> </ul>
<b>SEN (IDP Wales)</b>	<b>Special Needs Register</b>	<ul style="list-style-type: none"> <li>• Schools can check their data accuracy with your data</li> <li>• Encourages school and the SEN team to share key information</li> </ul>
<b>Governors</b>	<b>Current Governors</b>	<ul style="list-style-type: none"> <li>• Self Service governor appointments and positions</li> </ul>
<b>CSS</b>	<b>Open Involvements</b>	<ul style="list-style-type: none"> <li>• Children registered to their school with an open involvement and key contact</li> </ul>
<b>Admissions</b>	<b>Changes to Allocations</b>	<ul style="list-style-type: none"> <li>• Let schools list the changes to offers to their school after the offer date to support the pupil inductions</li> </ul>
<b>Children Employment</b>	<b>Register of Work Permits</b>	<ul style="list-style-type: none"> <li>• Schedule of work permits issued to children</li> </ul>

Module	Report	Benefits
<b>Children in Entertainment</b>	<b>Register of Licences</b>	<ul style="list-style-type: none"><li>• Schedule of children with an entertainment licence issued</li></ul>

## 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

Updates to Preferences since 18/05/2024 Green Abbey School

STUD_ID	SURNAME	FORENAME	DOB	NCY	New Status	Old Status	Change Date	Action
8917018	Aamir	Daniel-Jen-An	18/06/2013	6	Allocated		13/06/2024	+ Offer
8904139	Abrams	Kathryn	26/12/2012	6	Refused / No longer required	Allocated	17/06/2024	- Remove
8904139	Abrams	Kathryn	26/12/2012	6	Allocated	Provisional	17/06/2024	+ Offer
8904139	Abrams	Kathryn	26/12/2012	6	Provisional	Offer	11/06/2024	+ Offer
8903862	Adams	Helen	03/12/2012	6	Allocated	Offer	11/06/2024	+ Offer
8905261	Adkins	Gilbert	18/11/2012	6	Allocated	Offer	11/06/2024	+ Offer
8915645	Charalambous	Clara	10/05/2013	6	Allocated	Offer	11/06/2024	+ Offer
8903850	Coleman	Julian	24/05/2013	6	Allocated	Waiting List	18/06/2024	+ Offer
8903850	Coleman	Julian	24/05/2013	6	Waiting List	Allocated	18/06/2024	+ New
8903850	Coleman	Julian	24/05/2013	6	Allocated		11/06/2024	+ Offer
8903890	Howard	Jack	29/01/2013	6	Provisional	Offer	11/06/2024	+ Offer
8903884	Mitchell	Kelly	24/09/2012	6	Allocated	Offer	11/06/2024	+ Offer
8903945	Morgan	Barbara	23/04/2013	6	Provisional	Offer	11/06/2024	+ Offer
8903922	Murphy	Elizabeth	07/09/2012	6	Provisional	Offer	11/06/2024	+ Offer
8903943	Powell	Matthew	05/08/2013	6	No Longer Required	Offer	11/06/2024	- Remove
8903917	Ramsay	Janet	14/07/2013	6	Allocated	Offer	11/06/2024	+ Offer
8903933	Young	Gary	26/04/2013	6	Allocated	Offer	11/06/2024	+ Offer

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

Student Surname	Student Forename	Student DOB	Student Gender	Current School	Admissions Address	BSCP	UK (Home?)	UK (EA)	Applicant Title	Applicant Initial	Applicant Surname	Applicant Forename	Applicant Relationship	Admissions Address	Applicant Home Phone	Applicant Work Phone	Applicant Mobile Phone	Applicant Other Contact	Applicant Email
Adams	Helen	03/12/2012	F	Abacus Nursey School	12 Wood Road, Bedford, MK43 7BS	No	No												
Adkins	Gilbert	18/11/2012	M		16 Stanley Boulevard, Normant, Bravaton, Simshire, Z1 5DC	No	No												
Charalambous	Clara	10/05/2012	F	Pilgrim Independent School	1 Westfield Lodge, 94 Hadham Road, Bishops Cleeve, Hertfordshire, CV	No	No	Mr	N	Charalambous	Aitar	Sister	1 Westfield Lodge, 9 01216 794179	07585 262475				Charalambous@Kenya.org	
Howard	Jack	29/01/2012	M	St Marks	140 Sandridge Road, St Albans, Hertfordshire, AL1 4AP	No	No	Lady	P	Howard	Sajida	Brother	140 Sandridge Road, 01193 593720	07732 712481				Howard@Siena.co.uk	
Mitchell	Kelly	24/09/2012	F	Leap Frog	6 Burleigh Road, St Ives, Cambridgeshire, PE27 3DF	No	No	Lady	J	Mitchell	Casper	Aunt	6 Burleigh Road, St I 01793 125828	07520 830548				Mitchell@Lynx.net	
Morgan	Barbara	23/04/2012	F	Mariness	28 Bunyan Road, Hitchin, Hertfordshire, SG5 1NW	No	No	Sir	O	Morgan	Caflum	Other Family	28 Bunyan Road, Hi 01827 875405	07635 382619				Morgan@Ziva.co.uk	
Murphy	Elizabeth	07/09/2012	F	Bumble Bee Nursery	Socomec Ltd, Knowl Piece, Hitchin, Hertfordshire, SG4 0TY	No	No	Sir	Y	Murphy	Kaaim	Head Teacher	Socomec Ltd, Knowl 01666 298775	07205 107457				Murphy@Becky.org	
Ramsay	Janet	14/07/2012	F	Markness	15 The Cloisters, Ampthill, Central Bedfordshire, MK45 2UJ	No	No	Ms	L	Ramsay	Verity	Son	15 The Cloisters, Am 01128 184554	07218 144511				Ramsay@Milk.co.uk	
Young	Gary	26/04/2012	M	Leap Frog	22 Silver Street, Bedford, MK40 1SY	No	No	Mr	BIG	Young	Big	Father	22 Silver Street, Bedford, MK40 1SY					biggary@hotmail.com	
Amir	Daniel-Jean	18/06/2012	M	Biggleswade Academy	12 Onion Mountain, Normant, Detaville, Simshire, Z2 1DA	No	No												
Coleman	Julian	24/05/2012	M	Bumble Bee Nursery	5 Oatridge Gardens, Hemel Hempstead, Hertfordshire, HP2 4FG	No	No	Rev	I	Coleman	Aurelius	Father	5 Oatridge Gardens, 01859 818886	07446 489569				Coleman@Navi.org	

- 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

Rank	Overdescription Category	Student Surname	Student Forename	Student DOB	Student Gender	Home LEA	Home Mv	Application Reference Number	Current School	Admissions Address	Student Current Address	Moving Address	Moving date	App STATUS	Date Place Req	Crown Service	Multiple Birth	BICP (Parent)	BICP (LA)	LAC (Parent)	LAC (LA)	Sibling (Parent)	Sibling (Verified)	Sibling Surname	Sibling Forename	Sibling DOB	Sibling Gender	Matched to LA	Catch (Parent)	Catch (LA)	Distance (Parent)	Distance (LA)		
	2023 In Year Transfers 2023/24 Green Abbey School																																	
		Adkins	Donna		F	8217		820-2023-57-K-000746		6 High Street, Normar	6 High Street, Normant, Alphaton, Simshire, Z1 2BA			CWL		No	No	No	No	No	No	No	No					No	No	No	No	No	No	No
		Adkins	Donna		F	8217		820-2023-57-K-000747		6 High Street, Normar	6 High Street, Normant, Alphaton, Simshire, Z1 2BA			CWL		No	No	No	No	No	No	No					No	No	No	No	No	No	No	
		Bbban	Bara		M	8		820-2023-09-K-000 Leap Frog		34 Church Walk, Mars	34 Church Walk, Marston Moretayne, BEDFORD, Sim			WOL		No	No	No	No	No	No	No					No	No	No	No	No	No	No	
		Bell	Herbert		M	8218		820-2023-55-K-000697		16 Lowerton Street, E	16 Lowerton Street, Eggwold, Miketon, Simshire, Z4 C OAS			OAS		No	No	No	No	No	No	No					No	No	No	No	No	No	No	
1		Dell	Karen		F	8		820-2023-54-E-000: St Thomas More Upp	2 Fetlock Close, Claph 2 Fetlock Close, Clapham, Bedford, MK41 6BG					OAS		No	No	No	No	No	Yes	Yes				No	No	Yes	No	No	8.000			
		Harrell	Bob		M	8218		820-2023-55-K-000 Waters Edge Primary	1 Valley Drive, Arlton, 1 Valley Drive, Arlton, Deltaville, Simshire, Z2 ODD					CWL		No	No	No	No	No	No					No	No	Yes	No	No	4.060			
		Huang	Don		M	8218		820-2023-55-K-000 Waters Edge Primary	1 Market Avenue, Egg 1 Market Avenue, Eggwold, Echoton, Simshire, Z2 4AC OAS					OAS		No	No	No	No	No	No					No	No	No	No	No	8.450			
2		Stoke	Fred		M	8		820-2023-54-E-000604		85 Milton Road, Clapf	85 Milton Road, Clapham, Bedford, MK41 6AS			PENI		No	No	No	No	No	No	No					No	No	No	No	No	2.800		
		Wade	Dennis		M	8218		820-2023-55-K-000 Waters Edge Primary	11 Church Square, Jac 11 Church Square, Jackson, Kalmton, Simshire, Z3 OD PENI					PENI		No	No	No	No	No	No					No	No	No	No	No	3.960			
		Walsh	Marcia		F	8218		820-2023-55-K-000 Waters Edge Primary	16 Hill Street, Normar	16 Hill Street, Normant, Deltaville, Simshire, Z2 1CD PENI				PENI		No	No	No	No	No	No					No	No	No	No	No	4.610			

- 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 Primary 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

Your Children with In Year application made in the last 60 days																
Student Surname	Student Forename	Student DOB	Student Gender	LA ONE Reference	Student NCE Application Status	Form Received	Form Imported	Reason	Applicant Title	Applicant Initials	Applicant Surname	Applicant Forename	Applicant Home Phone	Applicant Work Phone	Applicant Mobile Phone	Applicant Email
Vvban	Vara	31/03/2011F		8902140	8 PENDING		09/08/2024	Friendship anMr			Vvban	Fred				

- 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

## What 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.