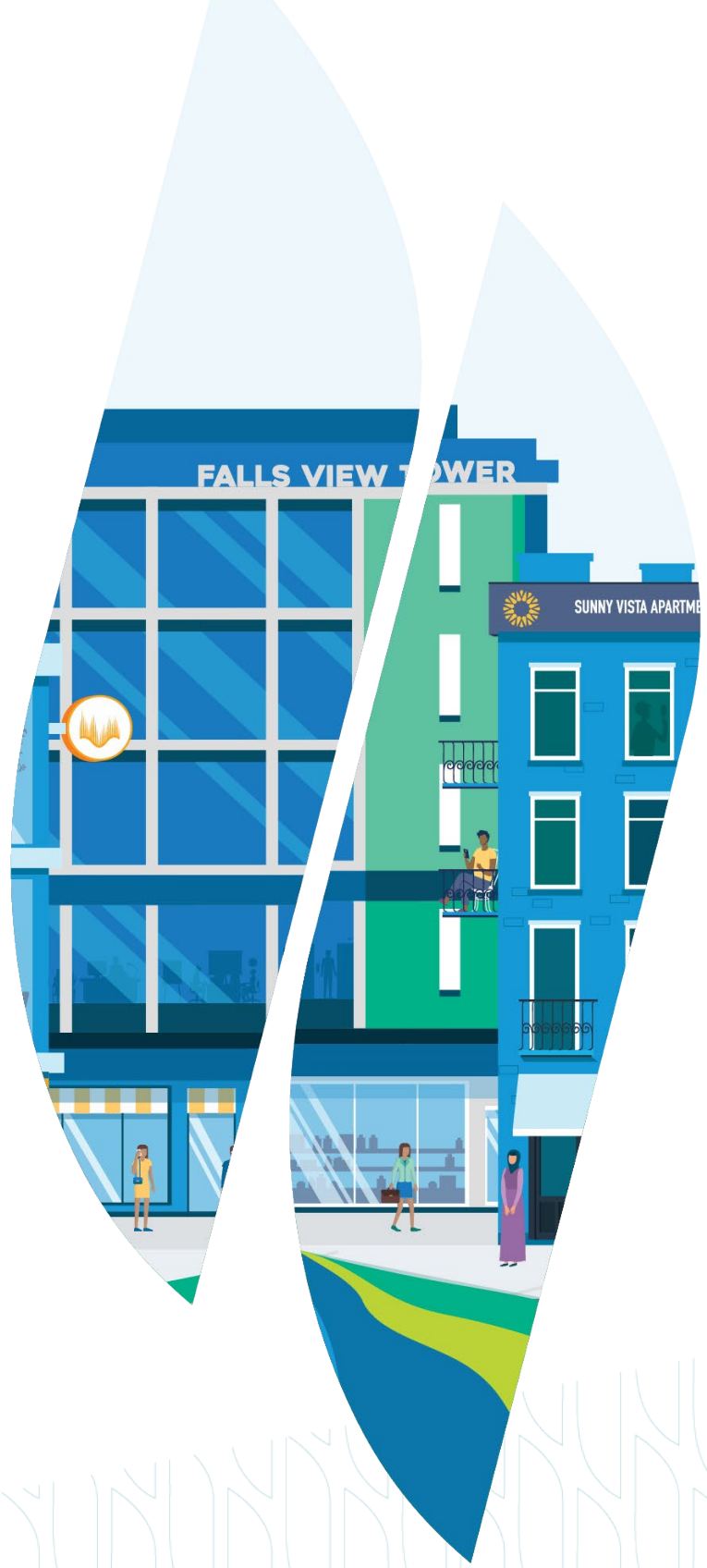




REAL ESTATE SOFTWARE



G&B Import

Service Proposal



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Revision History

Release	Description	CC/UR

Introduction

The **Grants and Benefits** module enable local authorities to maintain accurate and auditable records of pupil and parent entitlement to **Free School Meals (FSM)** and other child-based financial support within the module. The module currently supports online FSM applications submitted by parents, alongside back-office processes for reviewing, updating, and manually creating entitlement claims.

In recent years, local authorities and schools have increasingly adopted **data-driven approaches** to identify children who may be eligible for additional support. These include initiatives such as **automatic FSM eligibility checks**, targeted outreach, and the distribution of **Holiday Food Vouchers**. While these initiatives deliver significant benefits, they frequently generate large volumes of external data that must be reflected in Grants and Benefits.

At present, entitlement claims can only be created manually within the module. For authorities managing high-volume datasets, this introduces a substantial administrative burden and increases the risk of delays, inconsistency, or missed entitlement.

To address this challenge, **Professional Services have developed a bulk import tool** for the Grants and Benefits module. The tool allows users to securely upload external datasets and automatically create entitlement claims at scale, ensuring that eligible children receive the support they are entitled to in a timely, accurate, and efficient manner.

Key benefits for local authorities

- **Significant reduction in manual processing**

Automatically creates entitlement claims from external datasets, removing the need for time-consuming manual data entry.

- **Supports high-volume, data-led initiatives**

Ideal for auto-enrolment exercises, FSM eligibility sweeps, holiday provision schemes, and other projects that generate large datasets.

- **Improved data accuracy and consistency**

Reduces the risk of human error and ensures claim records are created in a standardised and controlled way.

- **Faster delivery of support to families**

Enables quicker creation of entitlement records, helping ensure eligible children receive meals and financial support without unnecessary delay.

- **Scales with local demand**

Designed to support both one-off initiatives and repeatable, ongoing data imports as local authority strategies evolve.

- **Efficient use of staff resources**

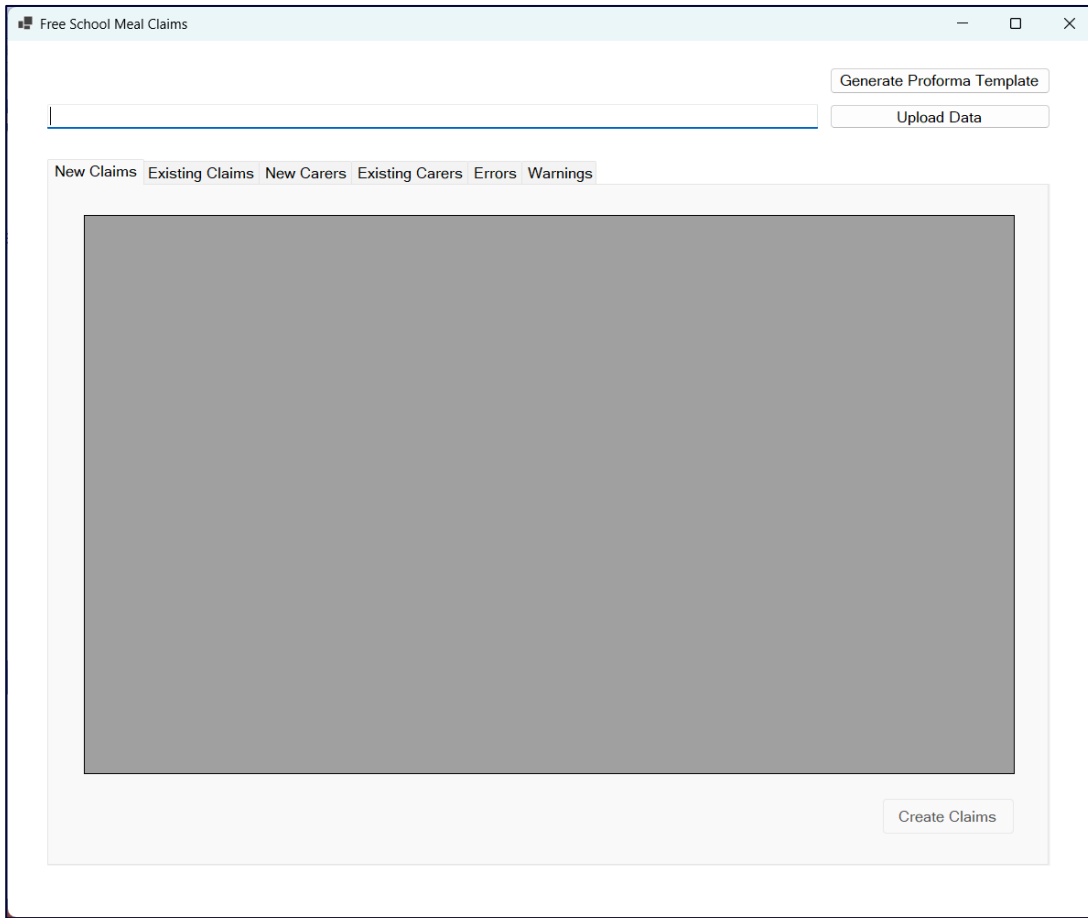
Frees up officer time to focus on complex cases, assurance, and customer support rather than routine data administration.

- **Works within the existing Grants and Benefits module**

Extends current functionality without changing established processes for managing, reviewing, and reporting on claims.

How does it work?

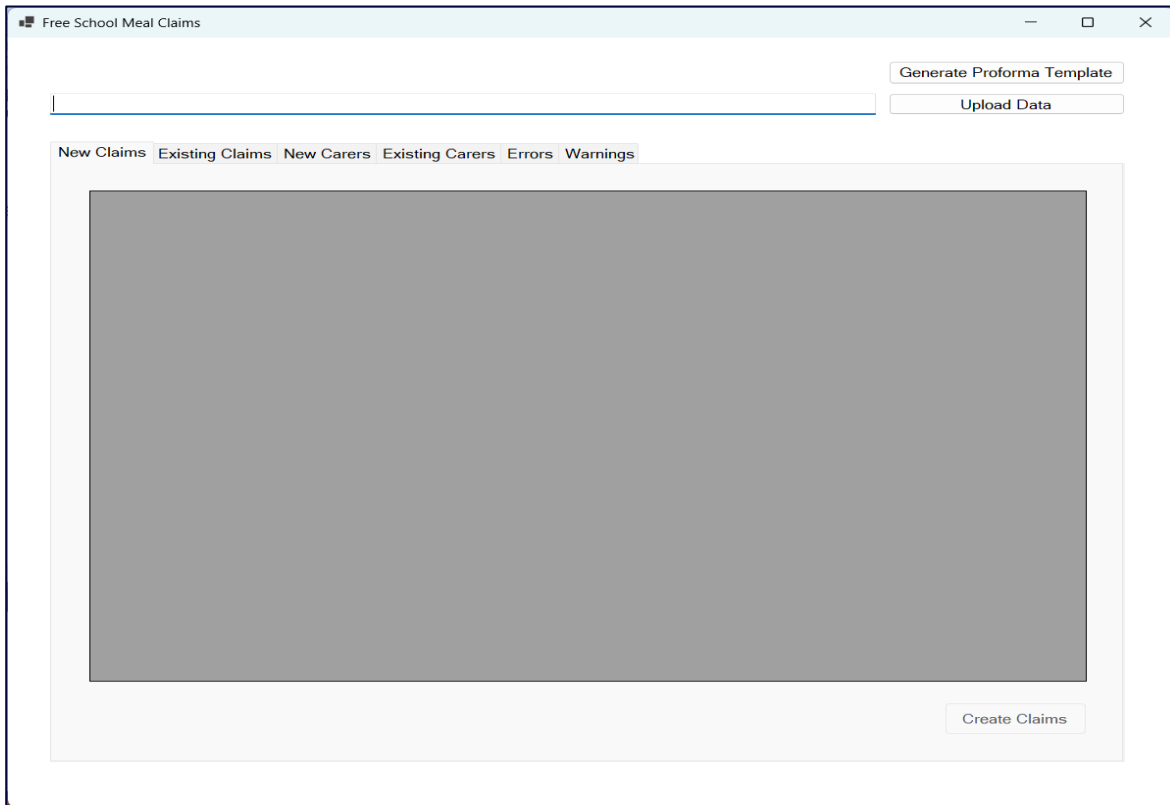
1. Generate a proforma template by clicking on the button and save it to your local directory.



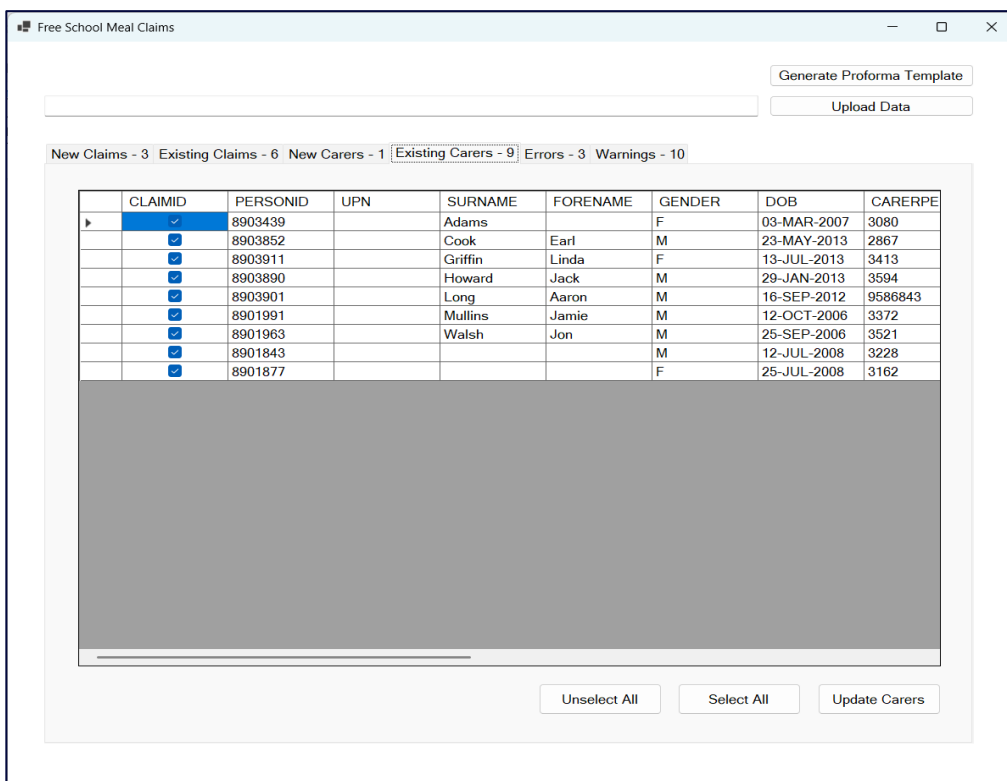
2. Populate the proforma template with the required data.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	A
1	PERSONID	UPIH	SURNAME	FORENAME	GENDER	DOR	NCY	STUD_BASE_ID	BASE_NAME	IFA_NO	DES_NO	ADDRESS_NO	BUILDING	STREET	POSTCODE	CAREPERSON_ID	CARERSLINNAME	CARERFORNAME	CAREFDOR
2																			
3	Fill records starting at row 5. Do not change headers. Hats are in row 2																		
4	123456	ABC123	Smith	Joe	M	01-JAN-2010											Jones	Mary	01-JAN-1988
5	8515022		Happy	Anika	F	14 xx 2014		9	73 Rainbow Prim		820	2999					3280 Smith	John	04 SEP 1952
6	8515521		Embery	Ibraheem	M	01-JUL-2013		6	73 Rainbow Primary School (p4F)								8889785 Hatchett	Ruth	17-MAR-195
7	8515570		Cheriman	Mary-Rose	F	09-FEB-2015		4	73 Rainbow Primary School (p4F)								3231 Slater	Ruderrick	01-MAR-194
8	8503890		Howard	Jack	M	29-JAN-2015		4	308 St Marks								3794 Phillips	Steve	
9	8501991		Mullins	Jamie	M	12-OCT-2006		10	73 Rainbow Primary School (p4F)								3372 Dagnell	Ian	12-SEP-1936
10	8609135		Adams		F	03-MAR-2007		10	73 Rainbow Primary School (p4F)								3080 Driver	Jacqueline	15-FEB-1946
11	8601985		Slater	Jenson	M	20-NOV-2006		10	73 Rainbow Primary School (p4F)								Carl	Anne	12-DEC-1951
12	8601901		Long	Aamon	M	16-SEP-2017		4	308 St Marks								Crosby	Muthia	31-NOV-1941
13	8501843				M	12-JUL-2008		9	73 Rainbow Primary School (p4F)								3223 Shepherd	Denielle	25-DEC-2002
14	8501877				F	29-JUL-2008		9	73 Rainbow Primary School (p4F)								3182 Lowthor	Theresa	05-NOV-196
15	8503811		Griffin	Linda	F	13-JUL-2013		4	308 St Marks								3113 Randall	Simone	01-JUL-1962
16	8503852		Cook	Bill	M	23-MAY-2013		4	308 St Marks								2867 C. J. G.	Helen	14-SEP-1942
17	8501902		Walsh	Ian	M	25-SEP-2006		10	73 Rainbow Primary School (p4F)								3721 Court	Marion	25-SEP-1946
18																			
19																			
20																			
21																			
22																			

3. Click the **Upload Data** button to upload the completed proforma template.

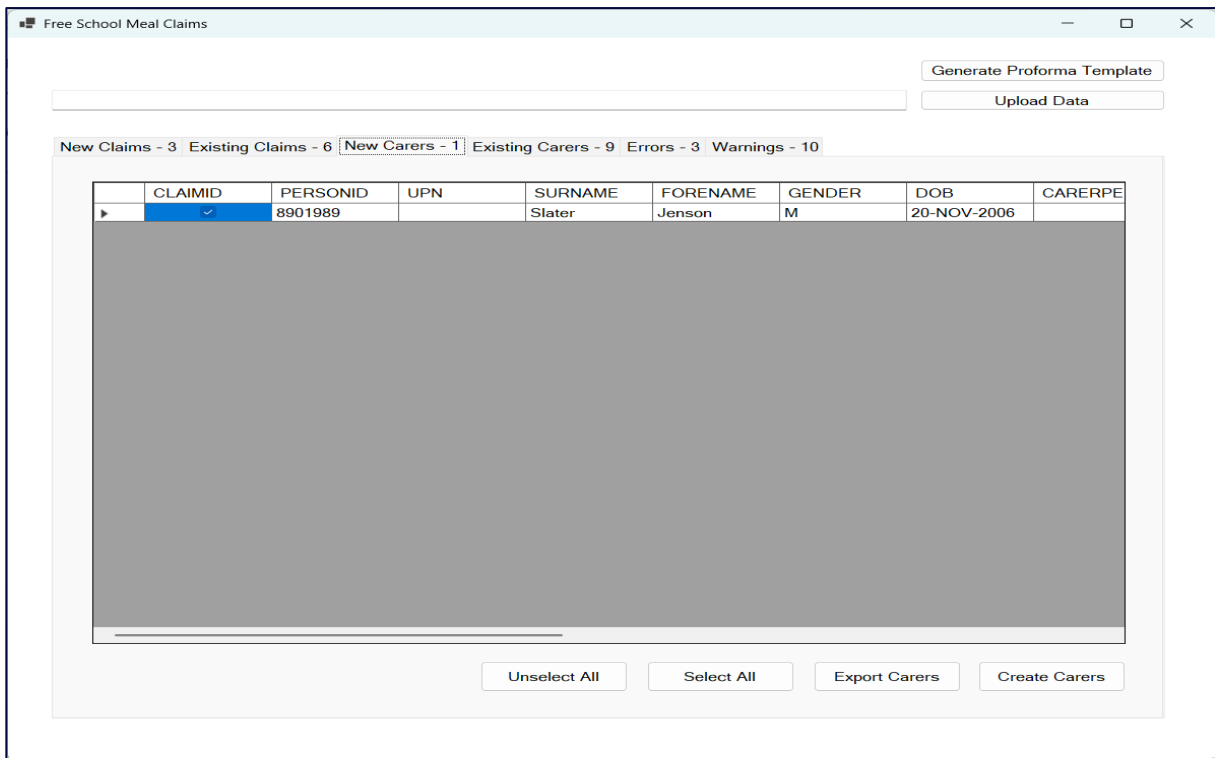


4. The application goes through a process of validating the data so checks that the student exists via the matching process. It validates the carer information and checks that all the necessary claim information has been provided. New claims are created for the records that have successfully passed validation.

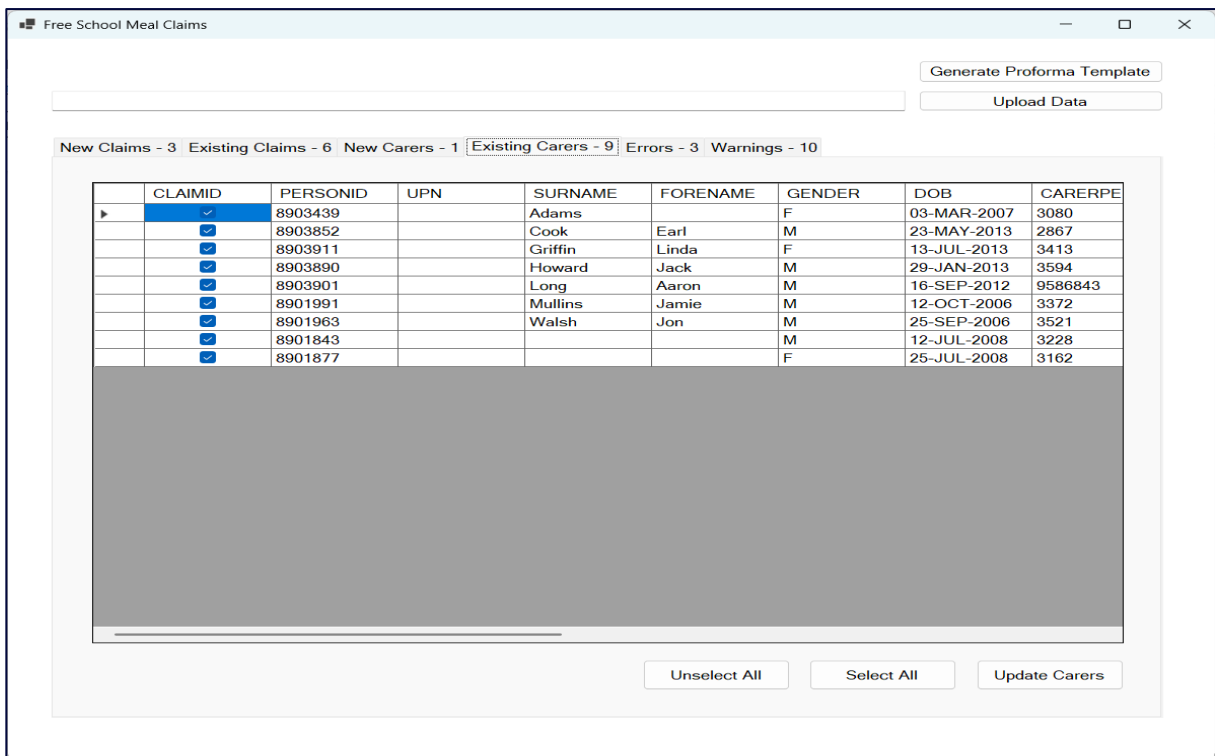


How does it work?

5. A new carer record is created for a carer that does not currently exist on the system by clicking on the **Create Carers** button.

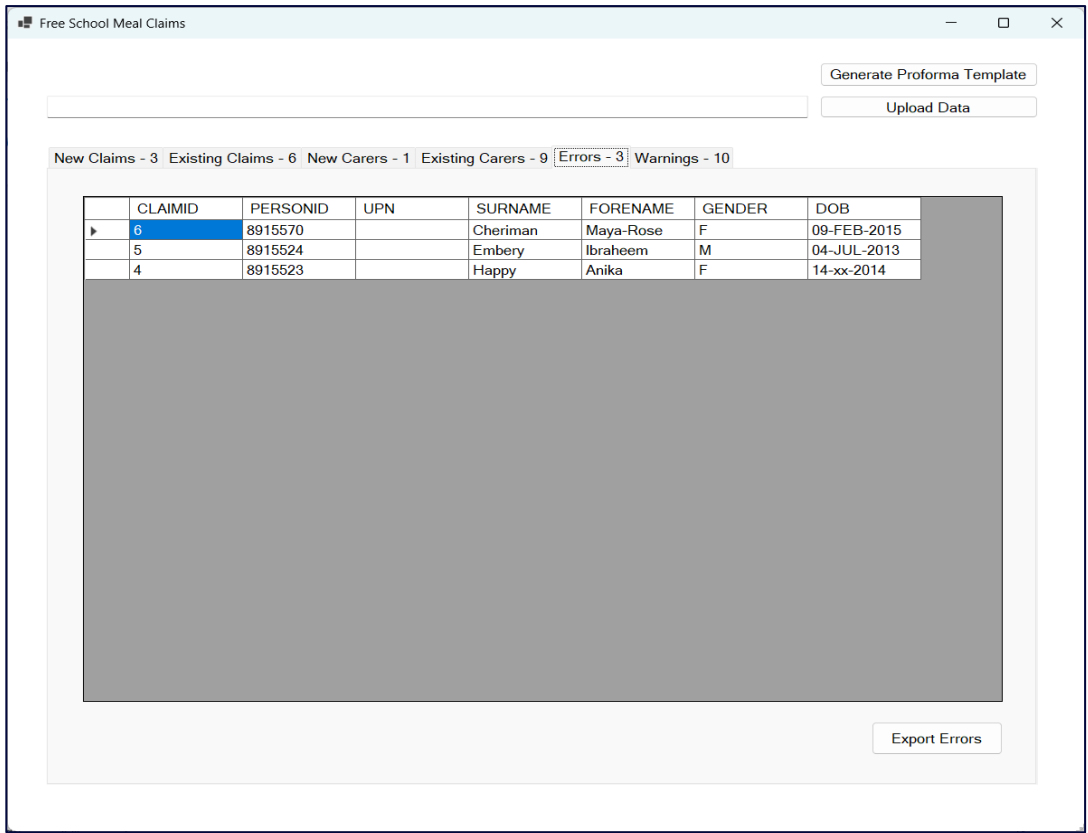


6. To view and check existing carer information click on the tab entitled **Existing Carers**.

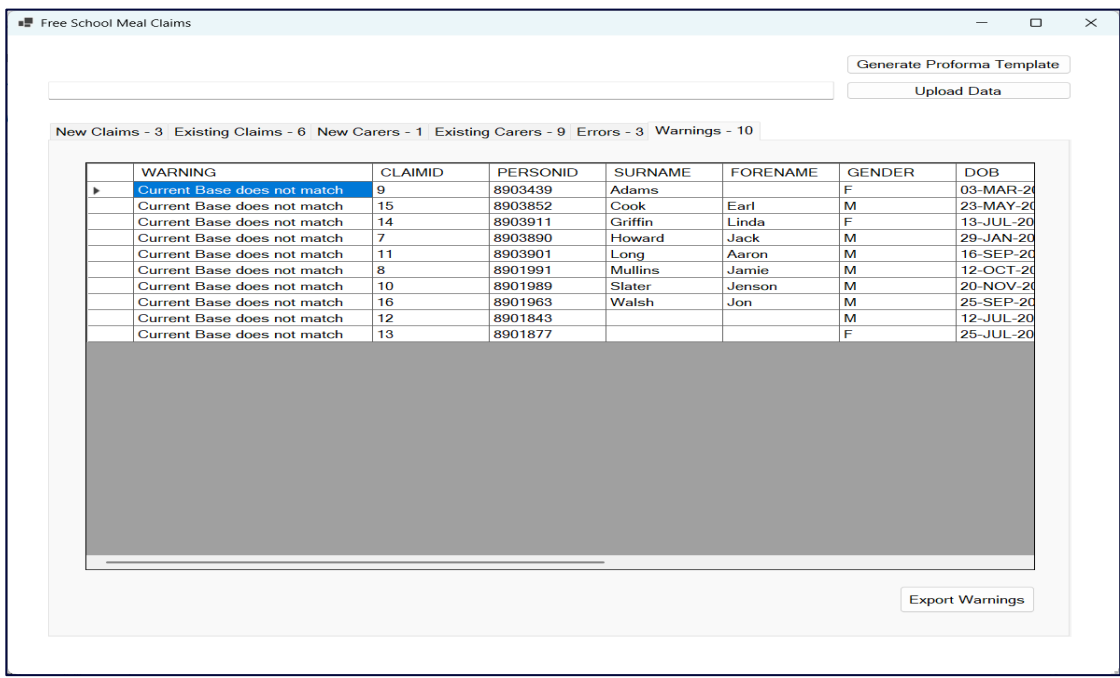


How does it work?

- The errors tab provides a list of record that have failed validation and therefore need to be reviewed and corrected before uploading again. Click on the button entitled **Export Errors** to download the list.

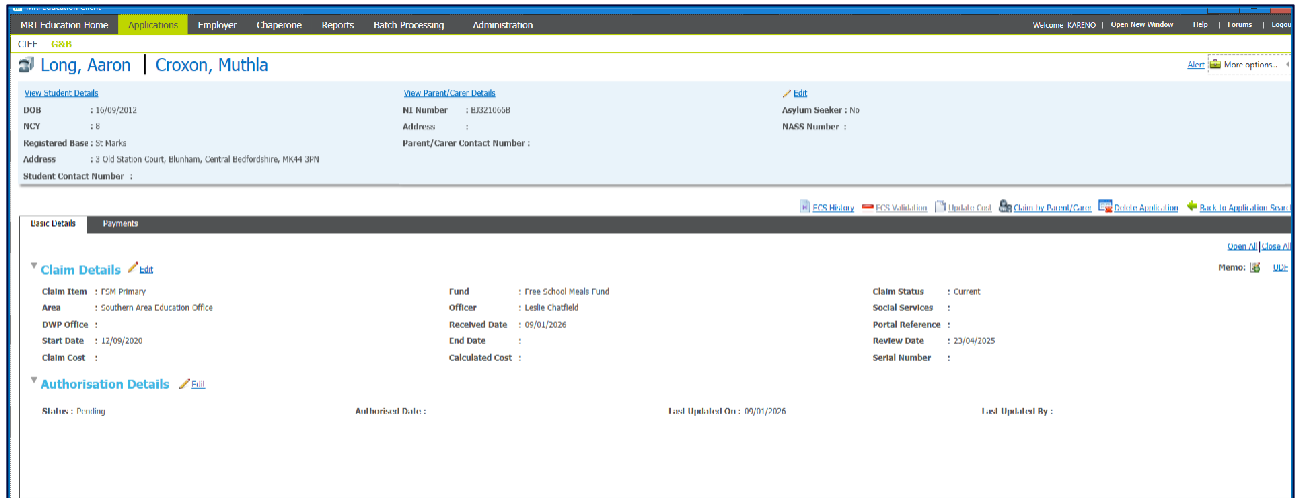


- A list of warnings concerning issues with the data is shown in the tab entitled **Warnings**. Warnings should be reviewed as data may be out of sync.



How does it work?

- 9. Claims that have been successfully created have a pending status and are viewable on the G&B system.



List of Tool Functions

- Create Proforma Template
- Upload proforma data spreadsheet
- Match Students
- Match Existing Claims
- Match Existing Carers
- Create New Carers
- Create Claim Records
- Errors
- Warnings

Service Offering

Included with the tool:

Consultancy

1. **Discovery and scope confirmation**

We'll run a short session to confirm what data needs importing and what you want to achieve. This helps us make sure the import approach fits your local processes, data sources, and expected outcomes before we start configuration.

2. **Test environment configuration**

We'll set up the bulk import tool in the Test environment so you can train and run checks, including:

- Set up the import tool in Test
- Provide an SSRS report so you can review and verify the imported data

Provided at least one week after Deliverable 1 is completed.

3. **Training and supported test imports**

We'll run a hands-on session to show nominated users how to use the import process, and we'll support you while you run test imports. This lets you check the data, confirm the results, and feel comfortable using the tool before going live.

Provided at least two weeks after Deliverable 2 is completed.

4. **Live environment configuration**

We'll set up the bulk import tool in the Live environment so you can start using it day to day.

Appendix Template Fields

Field	Format/Requirement	Description
DOB	prefer DD-MON-YYYY or Excel date (e.g. 01-JAN-2010)	Student's date of birth, used as part of the matching process.
Carer surname	required for matching. Max 30 chars	Carer's last name (parent/guardian), used to match to an existing carer record.
Carer forename	required for matching. Max 15 chars	Carer's first name, used with surname to match to an existing carer record.
Carer DOB	DD-MON-YYYY or Excel date	Carer's date of birth, used to help match to the correct carer.
NI number	when present must be 9 chars (no spaces)	Carer's National Insurance number (if available), used for identification/matching.
Relationship code	lookup	How the carer is related to the student (e.g., mother/father/guardian), from the relationship lookup list.
Parental responsibility	Single char when present (e.g. F/T)	Indicator of whether the carer has parental responsibility (value depends on your lookup/coding).
NASS number	Max 10 chars	NASS reference number (if applicable), stored against the carer record.
Email	Max 200 chars. Use valid email	Carer's email address (contact details).
Mobile	Max 18 chars	Carer's mobile phone number (contact details).
AUTH_BY	must exist in LOOKUPS TABLE_ID='0046'. Use dropdown	Authorised by (the person/role that approved the entitlement), from lookup table 0046.
A_OFFICE	must exist in LOOKUPS TABLE_ID='0045'. Use dropdown	Admin office code associated with the claim, from lookup table 0045.
CURR_STAT	must exist in LOOKUPS TABLE_ID='0312'. Use dropdown	Current status to apply to the claim (e.g., pending/active), from lookup table 0312.
CLAIM_CODE	must exist in CLAIM_ITEM. Use dropdown	The type of claim/item being created (e.g., FSM), from the Claim Item list.
REV_DATE	DD-MON-YYYY and must be > START_AT && < END_DT	Review date for the claim (when it should be reviewed), within the claim start/end dates.

Appendix Template Fields

START_AT	DD-MON-YYYY. Must be < END_DT and < REV_DATE	Start date for the entitlement/claim period.
END_DT	DD-MON-YYYY. Must be > START_AT and > REV_DATE	End date for the entitlement/claim period.
YEARVAL	must match FUNDS.YEAR for FUND_ID when provided	Financial year value for the selected fund (used when funding is year-specific).
FUND_ID	must exist in FUNDS	Fund identifier to link the claim to a specific funding stream.
CLAIMTYPE	must exist in CLAIM_TYPE. Use dropdown	Claim type/category to apply, from the Claim Type list.