

CAPITA



One Education Plan Monitoring Provider Portal

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Handbook

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01 / Overview

Introduction

Education Plan Monitoring (EPM) enables local authorities to manage business units, school support visits, plans and associated costs.

Using EPM Provider Portal

EPM Provider portal includes the following features:

Business Units

A business unit can be marked as a traded service and it is possible to record an email address and phone number for the business unit. For more information, see [Administering Business Units](#) on page 22.

Service Level Agreement/Base Association

SLAs for EPM are maintained in the v4 rich Client and can be associated to one or multiple bases within the portal. The School Support Visit record can be linked to the SLA for the visit cost calculations. For more information, see [Administering Service Level Agreements](#) on page 93 and [Adding Costs for School Support](#) on page 68.

Additional Questions and Answers

In EPM Provider portal, Questions and Answers perform the same function as UDFs in v3. This functionality is available in the Plan, School Support Visits, and School Support Costs areas of the EPM portal.

NOTE: UDFs in v3 will not be visible in the portal and will not be translated to additional questions.

For more information, see [Setting Up Additional Questions](#) on page 51.

Base Finance Reference Code

This feature enables the capture of a reference number for an external system, so that invoice details can be exported and matched to the correct base in an external financial system.

Within the EPM Provider portal, users can store a reference number against a base and change it, delete it, view it as necessary. The number is used for reporting purposes and can be exported with other base and invoice related data. For more information, see [Managing External References](#) on page 99.

Making a Business Unit Inactive

A business unit can be made inactive if not in use and no longer required. It can be made active again in the future, if required. For more information, see [Updating Business Unit Details](#) on page 25.

Making a Fee Code Inactive

A fee code can be made inactive in the EPM administration area so that it is no longer displayed in the school support area. For more information, see [Editing a Fee Code](#) on page 46.

Parameter Driven Reporting

The Provider portal enables you to define parameters for EPM to generate a standard set of reports. The parameters are Base, School Support Staff, Activity, Business Units and Dates.

A set of standard Crystal reports provides templates to help report designers.

For more information, see [Managing Reports](#) on page 85.

Enhanced Calendar

A calendar control in the Provider portal enables school support visits to be displayed based on the dates for which they are recorded. The calendar control is an intuitive tool, giving the daily, weekly, monthly and yearly view. For more information, see [Managing the Diary for School Support](#) on page 63.

ACL Security

The person and school support staff searches in Provider portal respect Access Control Level security.

One v4 Client

The following functionality in One v4 Client enables EPM to be used in the Provider portal. For more information, see [Setting Up in v4 Client](#) on page 11 .

Standard Lookups

The EPM module standard lookups are available in EPM Provider portal and should be maintained in the v4 Client via **Tools | Administration | Lookups**.

Defining EPM SLAs

EPM Service Level Agreements (SLAs) are maintained in the v4 Client. The SLA cost can be stored either as a value or a percentage and, depending upon the requirement, it can be used to calculate school support cost. For more information, see and [Administering Service Level Agreements](#) on page 93 and [Adding Costs for School Support](#) on page 68.

Financial Year

New financial years must be set up in the v4 Client. For more information, see [Setting Up a New Financial Year](#) on page 17.

To maintain historic financial years defined in v3, an enabling script must be run to bring the data from v3 to v4.

More Information:

For more information, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* on the One Publications website (www.onepublications.com).

Define EPM Roles

Roles are specific to the EPM module.

NOTE: Only people associated with roles (either system or EPM) can be accessed via the portal. For more information, see [Assigning a Person to an EPM Role](#) on page 15.

Mapping a User

A user of EPM Provider portal should be mapped to either a person or a base in the v4 Client. Visitors should be mapped to a person and a base user should be mapped to a base. For more information, see [Mapping a User to a Person](#) on page 14 and [Mapping a User to a Base](#) on page 15.

Auditing

Auditing for the EPM tables is done to the v4 Audit log.

Migration

For local authorities using EPM in v3, there is no formal migration. All functionality is delivered via the Provider portal.

Scripts are provided to migrate the following historical information:

- Financial Years
- Memos.

To obtain these scripts, please contact the One Service Desk via My Account.

More Information:

For information about configuring EPM, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* is available on My Account and on the One Publications website (www.onepublications.com).

NOTES: The target group lookup code is not included in the EPM portal. Any historic **Target** groups attached to the v3 school support record are displayed in read-only format. Amendments can only be made via database scripts and these scripts are *not* provided as part of the portal delivery. Time recorded under **Other Items** in v3 school support is *not* displayed in the EPM portal. **Teaching Quality** is not included in the EPM portal. If you deselect a focus code that has a v3 teaching quality record attached, the association between the teaching quality and the focus code is removed and it will not be displayed on the v3 **Teaching Quality** screen.

What's New in this Release

Two step verification has been added to the Provider portal to increase user security. For more information, see [Setting Up Two Step Verification](#) on page 9.

Using this Handbook

This handbook is intended for users and administrators of EPM in the Provider portal.

The first chapter of the handbook provides an overview of the new features included in EPM Provider portal.

The second chapter covers setting up and configuring the Provider portal.

The third chapter covers managing users in the Provider portal.

The fourth chapter covers setting up in the v4 Client.

The remainder of the handbook describes using EPM Provider portal to manage:

- Business units and user codes
- School support bookings
- Plans

Overview

- Reporting
- Invoicing
- Service Level Agreements
- Evaluation.

02 / Setting Up and Configuring the Provider Portal

Introduction

System administrators can define message templates, customise the text that is displayed on the website, upload a site logo and manage configuration of the website.

More Information:

For information about configuring EPM, refer to the *Deploying and Configuring EPM for Local Authorities* technical guide available on My Account and on the One Publications website (www.onepublications.com).

Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to: <https://support.google.com/chrome/answer/95416?hl=en-GB>

Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the Home button to display the Home page
Change Password	Click the drop-down adjacent to the user name and select Change Password . Enter your Current password , New password and Confirm new password . Click the Change password button.
Change Secret Question	Click the drop-down adjacent to the user name and select Change Secret Question . Enter your Current Password , Select a New Secret Question and enter a Secret Answer . Click the Save button. NOTE: This functionality is only available if second factor authentication is enabled.
Sign out	Click the Sign Out button adjacent to the user name.

03 / Managing Users in Provider Portal

Introduction

NOTE: Users are created and user permissions are set up in the v4 Client. For more information, see [Setting Up User Accounts and Permissions](#) on page 11.

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Accounts**.
2. Send the log in details (user name and initial password) to the new user via email.

For more information, see [Setting Up User Accounts and Permissions](#) on page 11.

Activating a Portal User Account

A new Provider portal user needs to activate their user account.

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they must click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.
2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

More Information:

For more information regarding user setup and permissions, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on [My Account](#) and on the One Publications website.

Logging into the Portal

A user with an active user account can log into the portal.

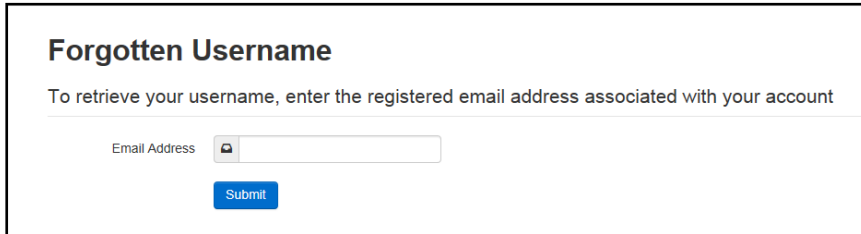
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.

Retrieving Your User Name

If you forget your user name:

1. From the portal **Log In** screen, click the **Forgotten your username?** link to display the **Forgotten Username** page.

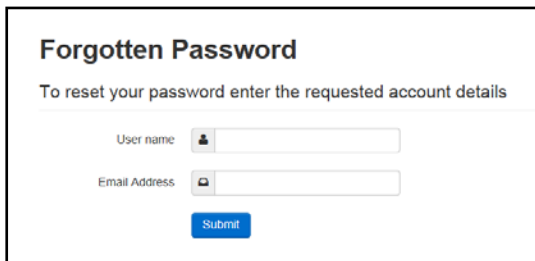


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

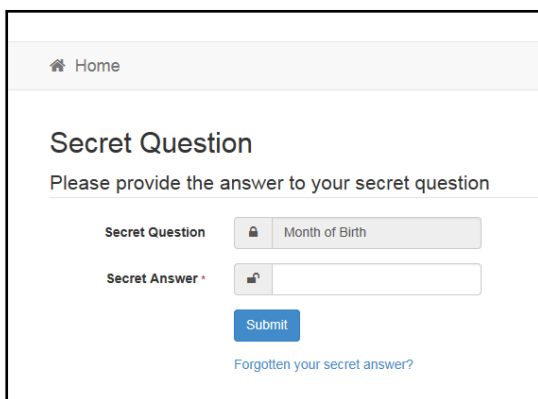
Resetting Your Portal Password

To reset your password:

1. From the portal **Log In** screen, click the **Forgotten your password?** link to display the **Forgotten Password** page.



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.



4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

If you need to reset your secret question:

1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. Follow the reset instructions in the email.

Setting Up Two Step Verification

Introduction

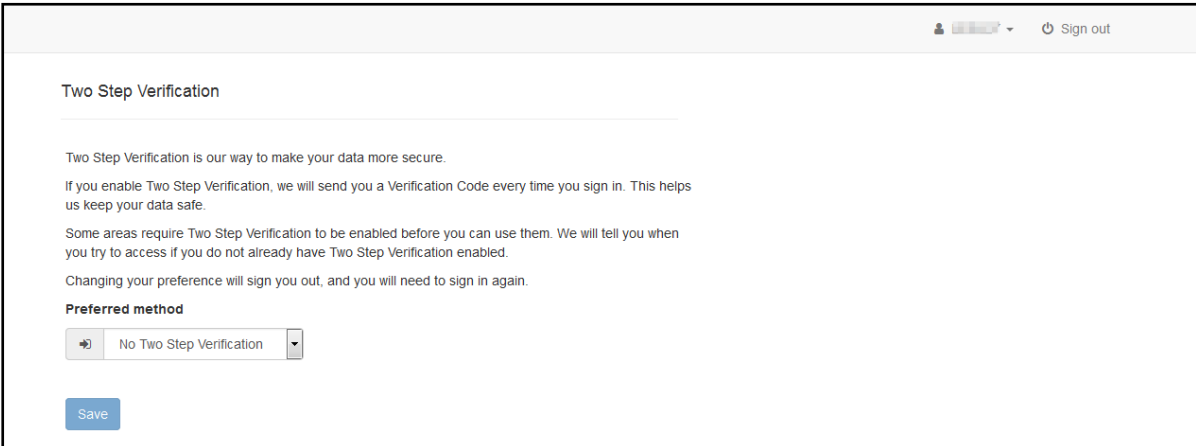
If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



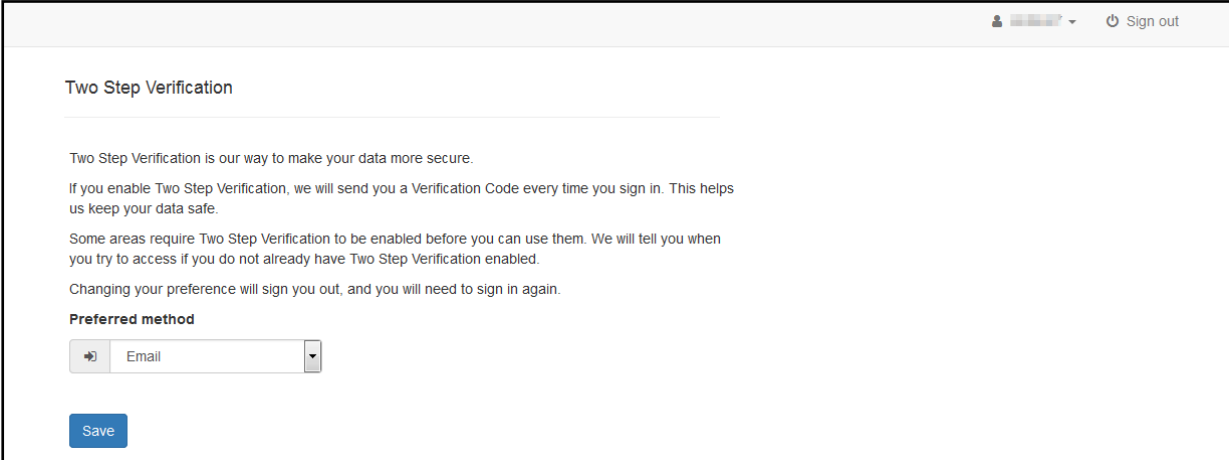
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

You will be signed out and will need to sign in again.

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

Preferred method

Email

Save

2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.

You will be signed out and will need to sign in again.

More Information:

For information about configuring EPM, refer to the *Deploying and Configuring EPM for Local Authorities* technical guide available on My Account and on the One Publications website (www.onepublications.com).

04 / Setting Up in v4 Client

Setting Up User Accounts and Permissions

The association of EPM permission roles to a user account in the v4 Client enables access to the EPM Provider portal. The permissions associated with the role control user access and determine the tiles displayed.

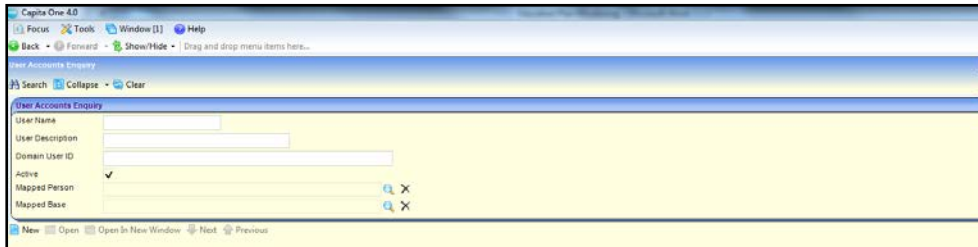
The following process should be followed:

1. Create a user account. For more information, see [Creating a User Account](#) on page 11.
2. Create a user group. For more information, see [Creating a User Group](#) on page 12.
3. Associate the user account to the user group. For more information, see [Associating a User Account with a User Group](#) on page 12.
4. Assign business processes to the user group. For more information, see [Assigning a Business Process to a User Group](#) on page 13.
5. Assign access rights. For more information, see [Assigning Access Rights](#) on page 14.

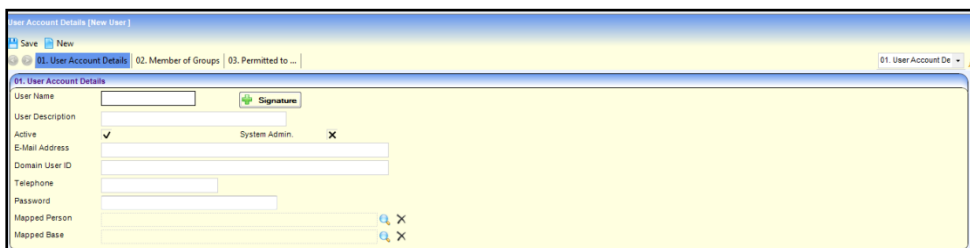
Creating a User Account

A user account must be created and mapped to either a person or a base.

1. In the v4 Client select **Tools | Administration | User Management | User Account** to display the **User Account Enquiry** page.



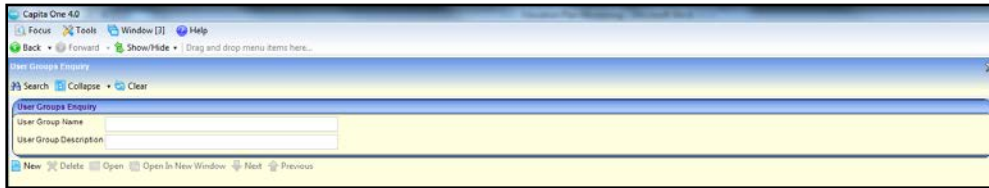
2. Click the **New** button to create a new user account.



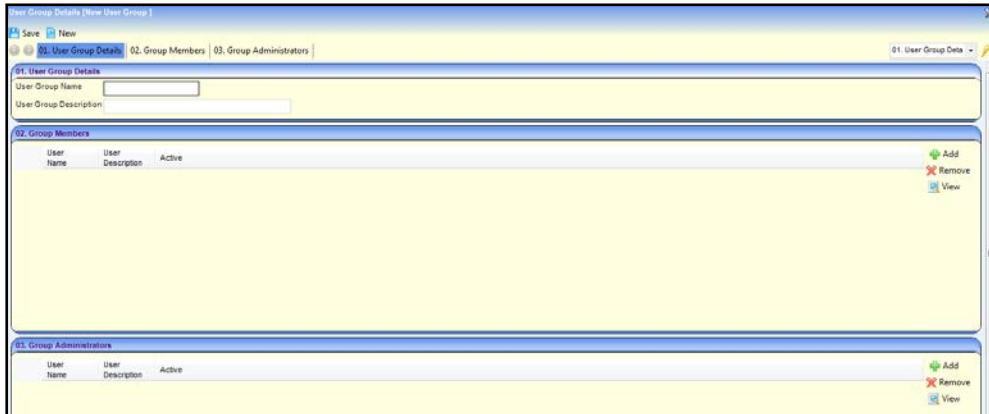
3. Enter **User Account Details**. For more information on these options, refer to the *Managing Users in v4* chapter in the *One System - Users, Groups, Permissions* handbook.
4. Click the **Mapped Person** browse button to map the user to a person. For more information, see [Mapping a User to a Person](#) on page 14
5. Alternatively, click the **Mapped Base** browse button to map the user to a base. For more information, see [Mapping a User to a Base](#) on page 15.
6. Click the **Save** button.

Creating a User Group

1. In the v4 Client, select **Tools | Administration | User Management | User Group** to display the **User Groups Enquiry** page.



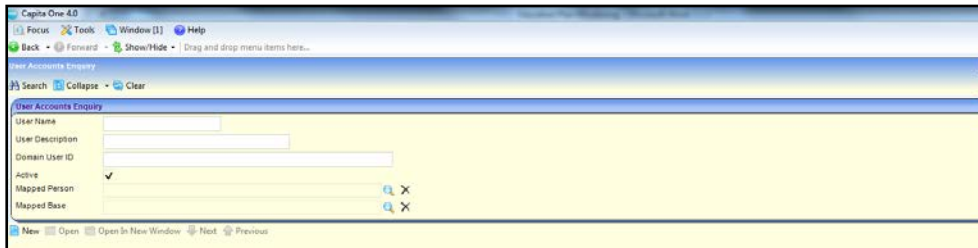
2. Click the **New** button to display the **User Group Details** page.



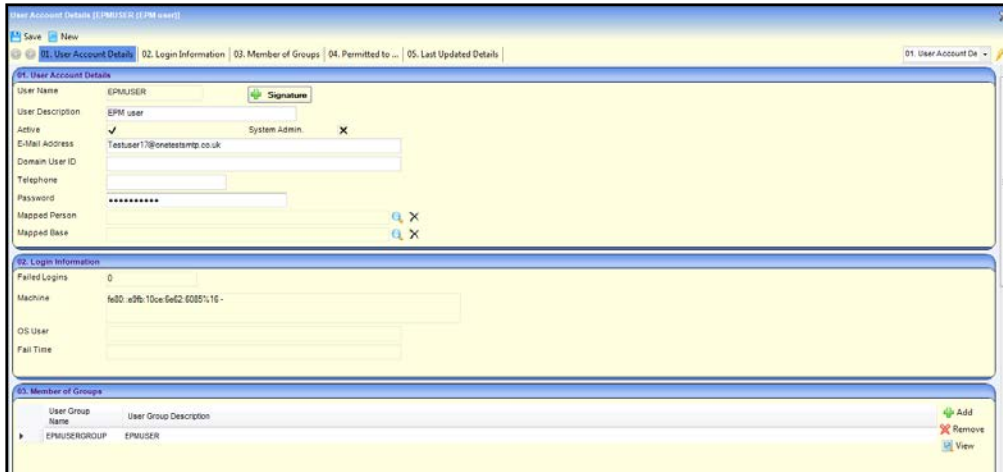
3. Enter **User Group Details** and click the **Save** button.

Associating a User Account with a User Group

1. In the v4 Client, select **Tools | Administration | User Management | User Account** to display the **User Account Enquiry** page.



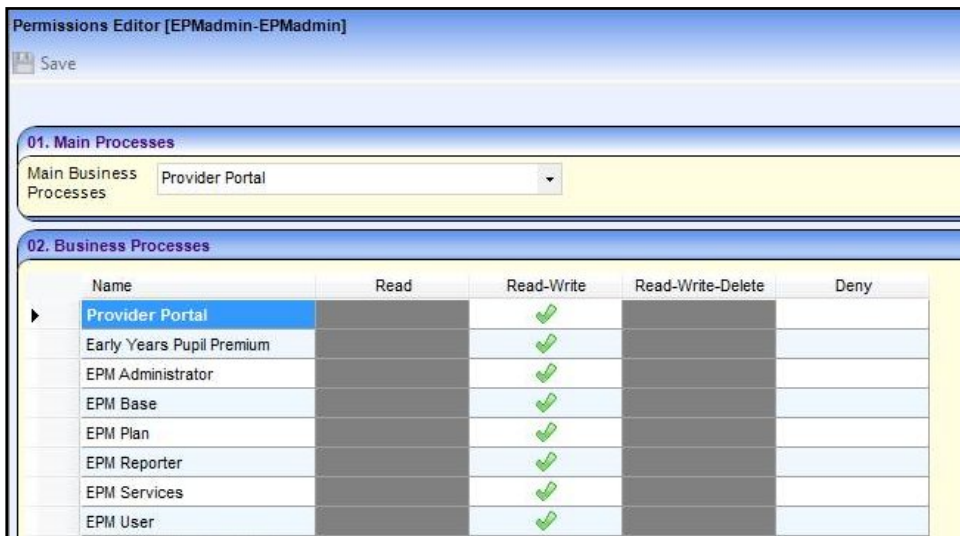
2. Enter search criteria and click the **Search** button to display a list of user accounts.
3. Select the required user account and click the **Open In New Window** button to display the **User Account Details** page.
4. Click the **Add** button on the **Member of Groups** panel and select the required group.



5. Click the **Save** button.

Assigning a Business Process to a User Group

1. In the v4 Client, select **Tools | Permissions | User Group Processes** to display the **User Group Processes Editor** page.
2. Select the required **User Group**.
3. From the **Main Business Process** drop-down list, select **Provider Portal**.



4. Select the required permissions and click the **Save** button.

Assigning Access Rights

Access rights for each area in EPM Provider portal should be assigned to user roles as shown in the following table:

	Admin	School Support	Plan	Report	Invoice	SLA	Eval. Areas	Mapped to:
EPM Administrator	x	x	x	x	x	x	x	
EPM User		x					x	A Person
EPM Reporter				x				
EPM Plan			x					
EPM Services		x		x	x	x		
EPM Base		x					x	A Base

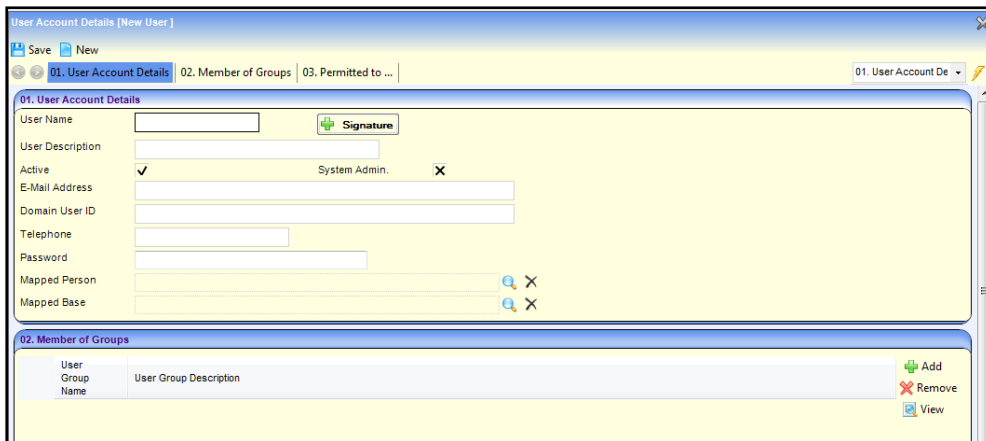
More Information:

RG_Permissions and *RG_ACL_ACL Definition* reference guides available from One Publications and My Account.

Mapping a User to a Person

Mapping a user to a person enables appointments to be added to their Outlook calendar. For information about setting up the link to a person's Outlook calendar, see [Setting Up the Link to Outlook](#) on page 16.

1. In the v4 Client, select **Tools | Administration | User Management | User Accounts** to create a new user or open an existing user account.
2. Enter the **User Name** and other user details on the **User Account Details** panel.



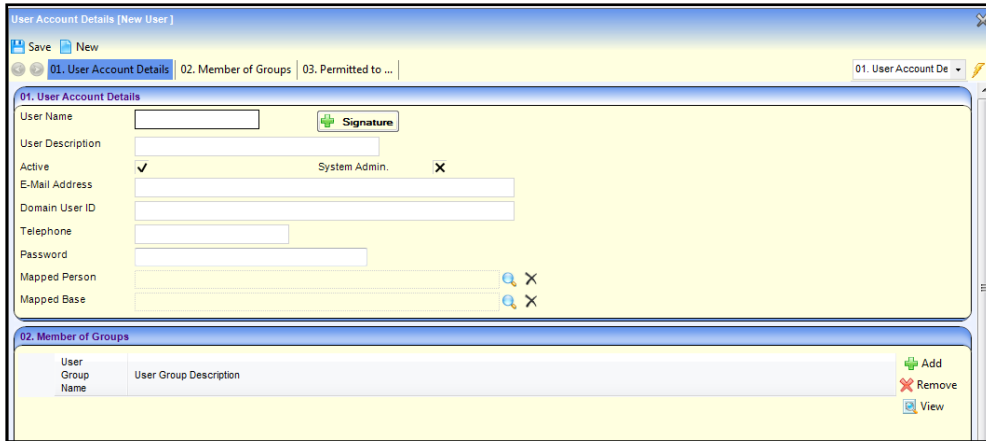
3. Click the **Mapped Person** browse button to display the **Person Enquiry** dialog.
4. Enter your search criteria and click the **Search** button to display a list of matching people.
5. Highlight the required person in the list and click the **Select** button to associate them with the user account.
6. Click the **Save** button.

Mapping a User to a Base

A user who is mapped to a base, e.g. a school, will only see information related to their base.

To map a user to a base:

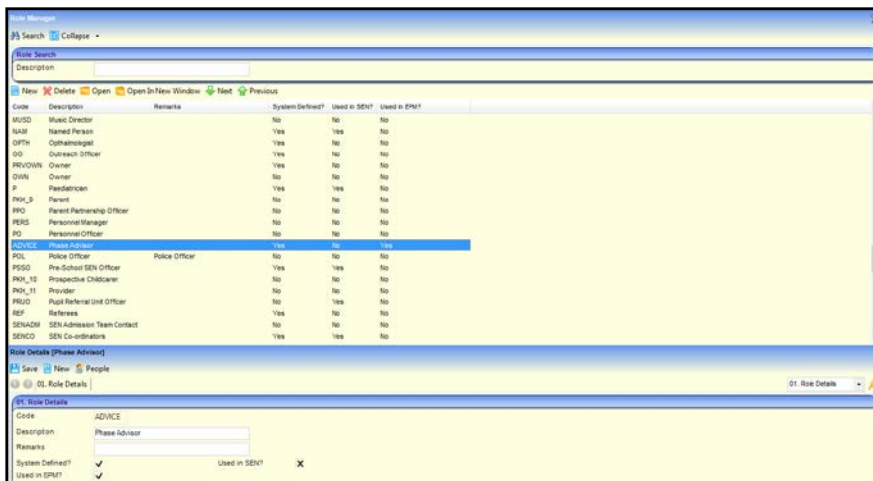
1. In the v4 Client, select **Tools | Administration | User Management | User Accounts**.



2. Enter the **User Name** and other user details on the **User Account Details** panel.
3. Click the **Mapped Base** browse button to display the **Base Enquiry** dialog.
4. Enter your search criteria and click the **Search** button to display a list of matching bases.
5. Highlight the required base in the list and click the **Select** button to associate it with the user account.
6. Click the **Save** button.

Assigning a Person to an EPM Role

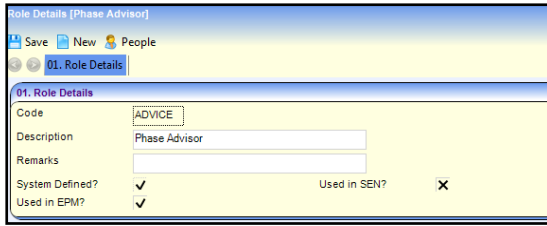
To be available for selection in EPM, a person must be assigned to a role in the v4 Client via **Tools | Administration | Role Manager** and the **Used in EPM?** check box must be selected.



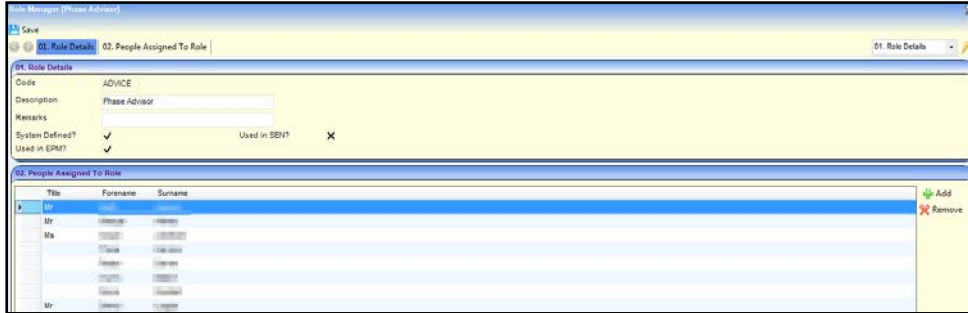
To assign a new person to a role:

1. Select **Tools | Administration | Role Manager**.
2. Select a role and click the **Open In New Window** button to display the **Role Details** screen.

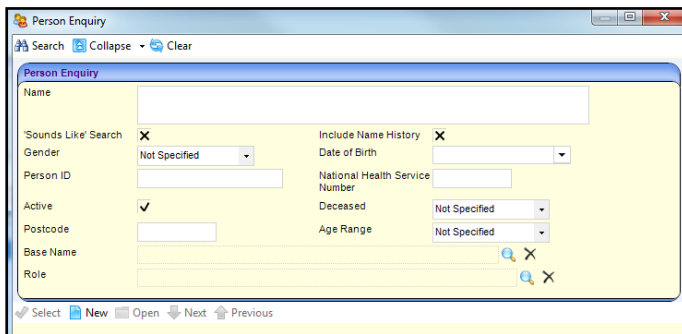
Setting Up in v4 Client



3. Select the **Used in EPM?** check box to display a tick.



4. Click the **Add** button on the **People Assigned to Role** panel to display the **Person Enquiry**.



5. Enter search criteria and click the **Search** button to display a list of matching people.
6. Highlight the required person in the list and click the **Select** button to add this person to the list of **People Assigned to Role**.
7. Click the **Save** button.

Setting Up the Link to Outlook

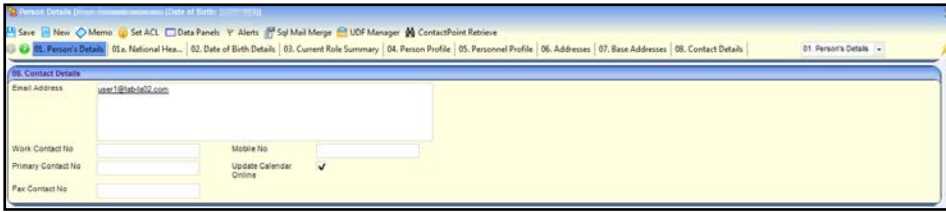
If a user is mapped to a person, school support bookings are added to their Outlook calendar.

More Information:

For information about configuring the Outlook Calendar, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* available on My Account on the One Publications website (www.onepublications.com).

The link to the appropriate calendar in Outlook is via the person's e-mail address, stored in the v4 Client on the **Person Details | Contact Details** panel as follows:

1. Select **Focus | People | Person** to display the **Person Enquiry** page.
2. Search for the required person.
3. Select the person and click the **Open In New Window** button to display the **Person Details** page.
4. Select the **Contact Details** panel and enter an **Email Address**.



- Click the **Save** button.

Lookup Tables

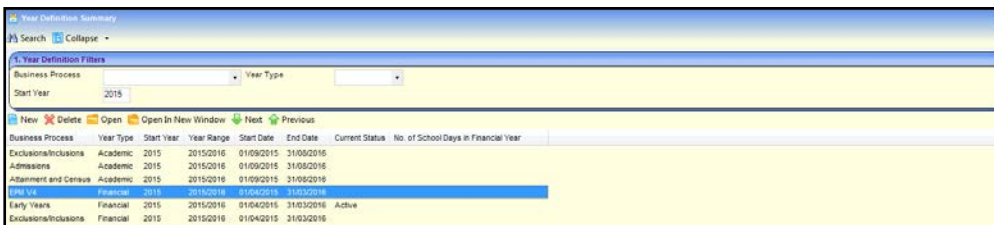
Lookup tables are created and updated by the System Administrator in the v4 Client via **Tools | Administration | Lookups**. The following are EPM specific lookup tables.

Table ID	Description	Area of Use
0500	EPM Activity Status	Plan Activity
0501	EPM National Priority	Plan Activity
0502	EPM Funds	Plan Activity
0503	EPM Cost Centres	Plan Activity
0504	Responsibility/Success Outcome	Plan Responsibility/Success
0511	Invoice Prefix	School Support/Booking Edit
0816	Status	School Support/Booking Action Points
0830	SLA Type	v4 Client: Focus Services Service Level Agreements Maintain Service Level Agreement
0831	SLA Units	v4 Client: Focus Services Service Level Agreements Maintain Service Level Agreement
0832	EPM Related Plans	Plan

Setting Up a New Financial Year

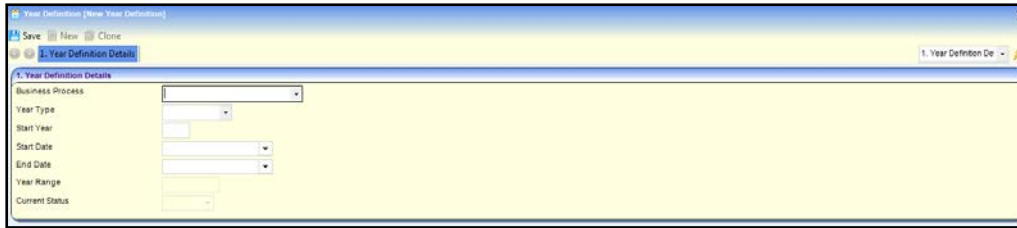
To set up a new EPM financial year:

- In the v4 Client, select **Tools | Year Settings | Year Definitions** to display the **Year Definition Summary** page.



- Click the **New** button to display the **New Year Definition** screen.

Setting Up in v4 Client



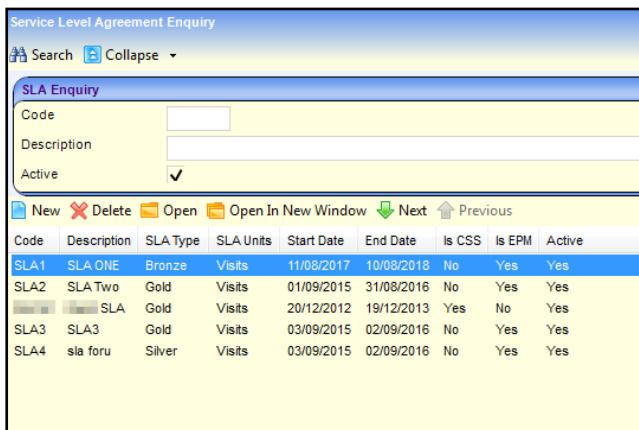
3. Select **EPM v4** from the **Business Process** drop-down.
4. Select **Financial** from the **Year Type** drop-down.
5. Enter a **Start Year**.
6. Select a **Start Date** and **End Date**.
7. Click the **Save** button.

Defining a New SLA

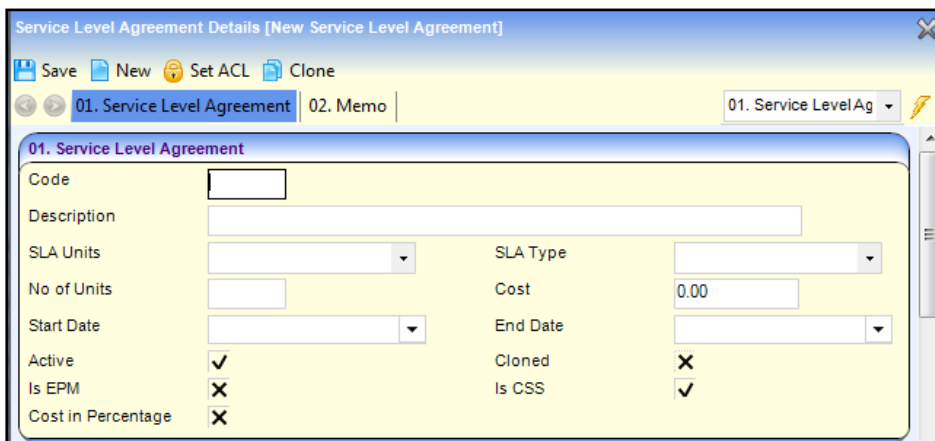
Service Level Agreements (SLAs) for EPM are defined in the v4 Client and can be associated with bases within the EPM portal. The costs associated with the EPM SLAs can be applied to the respective school support/booking costs.

To set up a new EPM Service Level Agreement:

1. In the v4 Client, select **Focus | Services | Service Level Agreements | Maintain Service Level Agreement** to display the **Service Level Agreement Enquiry** page.



2. Click the **New** button to display the **New Service Level Agreement** screen.



3. Enter a **Code** and **Description**.
4. Select **SLA Units** (*Lookup Table ID: 0831*).

5. Select an **SLA Type** (*Lookup Table ID: 0830*).
6. Enter **No of Units** to be provided.
7. Enter the **Cost**.
8. Enter the **Start Date** and **End Date**.
9. Select the **Is EPM** check box to display a tick. Only SLAs which have this check box selected are available for selection in EPM Provider portal.
10. If the SLA is required as a percentage, select the **Cost in Percentage** check box to display a tick.

For example, if **Cost** =25, when the SLA is applied, it will be calculated as 25% of the school support amount. For more information, see [Adding Costs for School Support](#) on page 68.

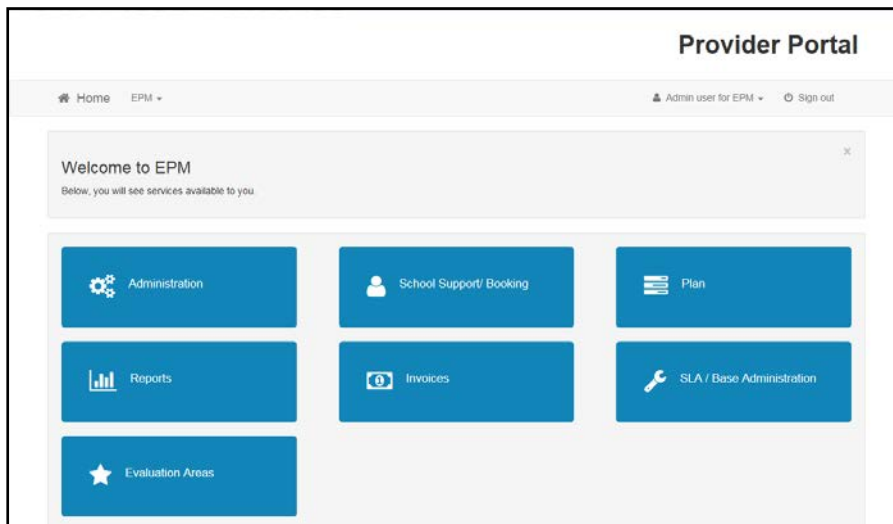
11. Click the **Save** button.

NOTE: An existing SLA can be cloned by selecting an SLA and clicking the **Clone** button.

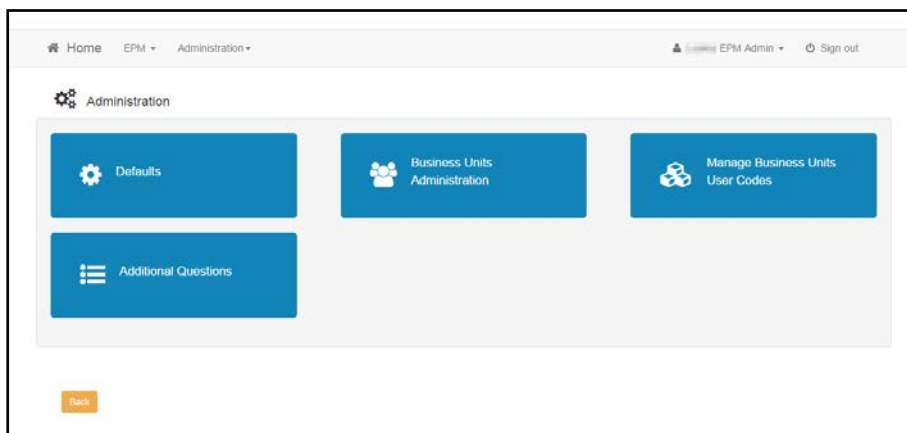
05 / EPM Administration

Introduction

The **Welcome to EPM** page is displayed when you login to the EPM Provider portal. This page displays the areas to which you have access.



Click the **Administration** button to display the **Administration** page.



Managing Defaults

Managing Support Parameters

The default parameters used throughout EPM can be viewed and updated.

Viewing the Support Parameters

1. Click the **Administration** button on the **Welcome to EPM** page.
2. Click the **Defaults** button to display the **Support Parameters** page.



Amending Support Parameters

1. View the support parameters. For more information, see [Viewing the Support Parameters](#) on page 21.

If required, amend the following parameters:

- **VAT Percentage:** The percentage of VAT that is included in support costs. It defaults to 17.50.
- **Year (In Hrs.):** The number of decimal hours that is considered to constitute a year when calculating the support cost for the Annual fee type. The default is 1700.00.
- **Day (In Hrs.):** The number of decimal hours that is considered to constitute a day when calculating support cost for the daily fee type. The default is 7.50.

2. Click the **Save** button.

Administering Business Units

Introduction

A business unit can be shared or modular. If a business unit is shared, all users have access to it. If a business unit is modular, users must be assigned to it in order to have access. For more information, see [Assigning User Access to a Business Unit](#) on page 25.

Local Authorities can mark a business unit as a traded service, defining a contact email address and phone number.

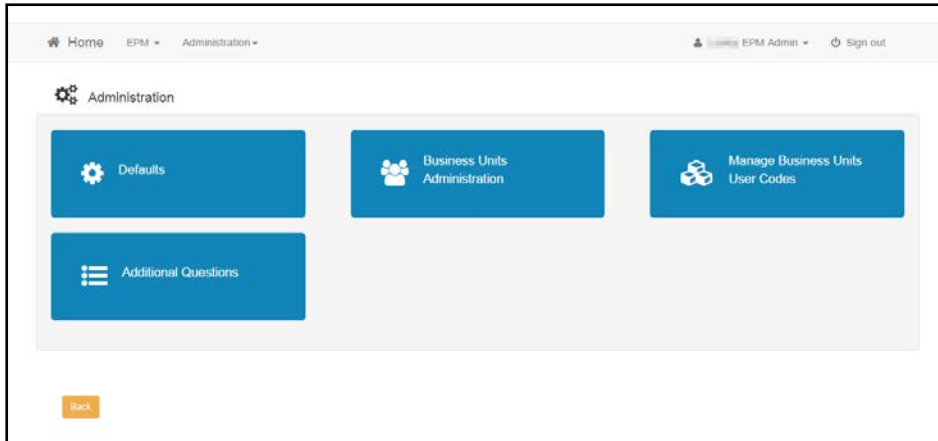
When a new business unit is defined, parameters relating to it are set up. Activities and users are assigned to business units.

A business unit that is no longer required can be made inactive. This means that it is no longer displayed, but does not require the attached sub records such as people and user codes to be removed.

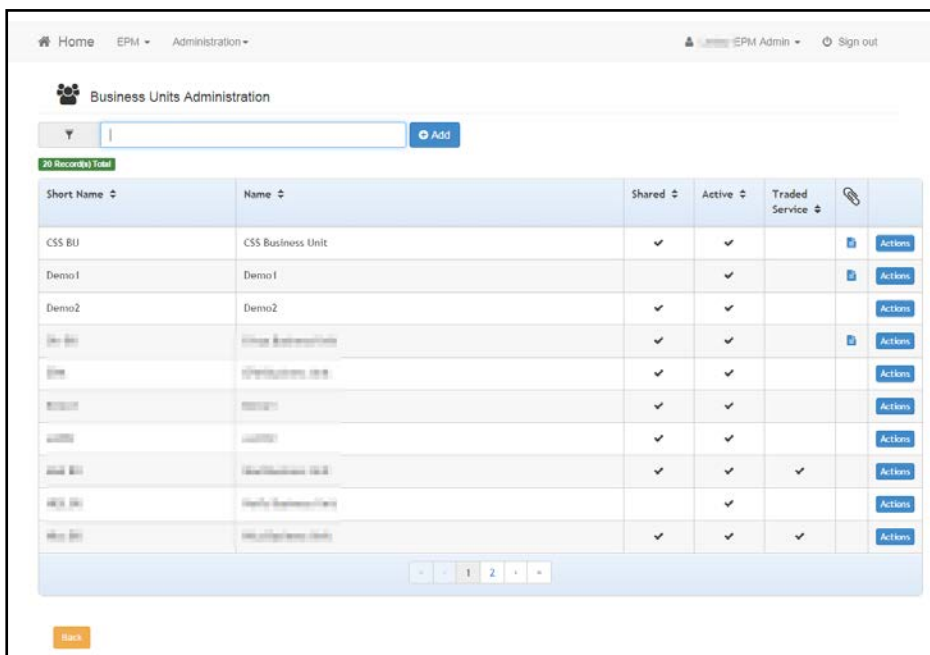
NOTE: To use EPM without using business units, accept the default EPM business unit, which has roles, people and user codes already assigned.

Displaying a List of Business Units

1. Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.



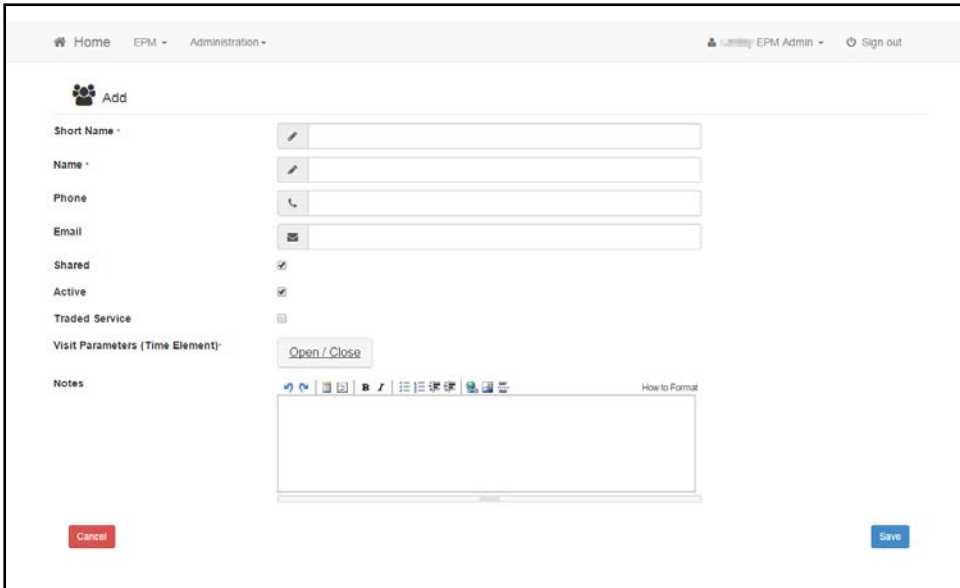
- Click the **Business Units Administration** button to display the **Business Units Administration** page.



- If required, enter a full or partial **Short Name** or **Name** to filter the list of business units.
- If required, click on a column heading to sort the list.

Adding a New Business Unit

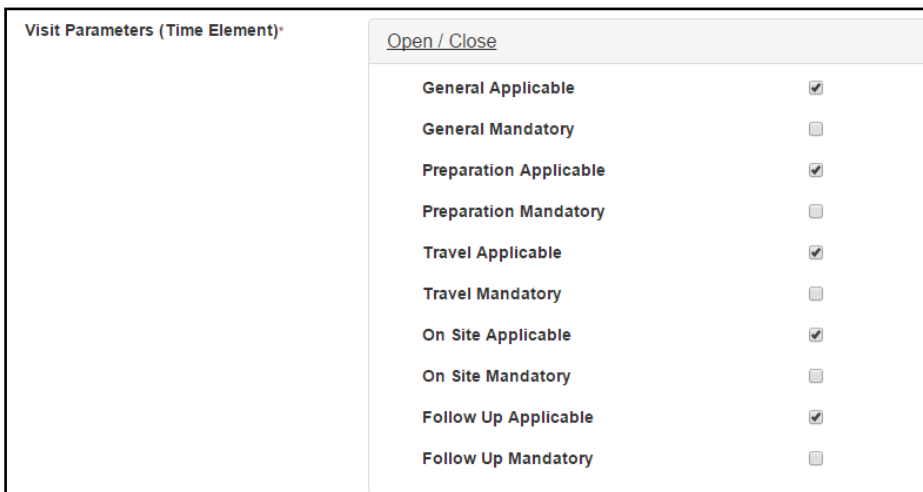
- Display the list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.
- Click the **Add** button to display the **Add** page.



3. Enter a **Short Name** for the business unit, which must be unique.
4. Enter a **Name**.
5. If required, enter a **Phone** number.
6. If required, enter an **Email** address.
7. If the business unit is modular i.e. it is not shared by all users with the required permissions, deselect the **Shared** check box so that only users associated with the business unit are able to access its details.
8. If required, select the **Traded Service** check box.

NOTE: A traded service is one that generates income from a range of activities such as selling services directly to users.

9. If required, enter **Notes**.
10. **Visit Parameters (Time Element)** can be selected as follows:
 - a. If required, click the **Open / Close** button to display the list of parameters.



- b. Select the check boxes for the required parameters.
11. Click the **Save** button.

Updating Business Unit Details

The details of a business unit can be updated. This includes making the business unit inactive.

1. Display the list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Select the required business unit.
3. Click the **Actions** button adjacent to the required business unit.
4. Click the **Edit** button to display the **Edit** page.

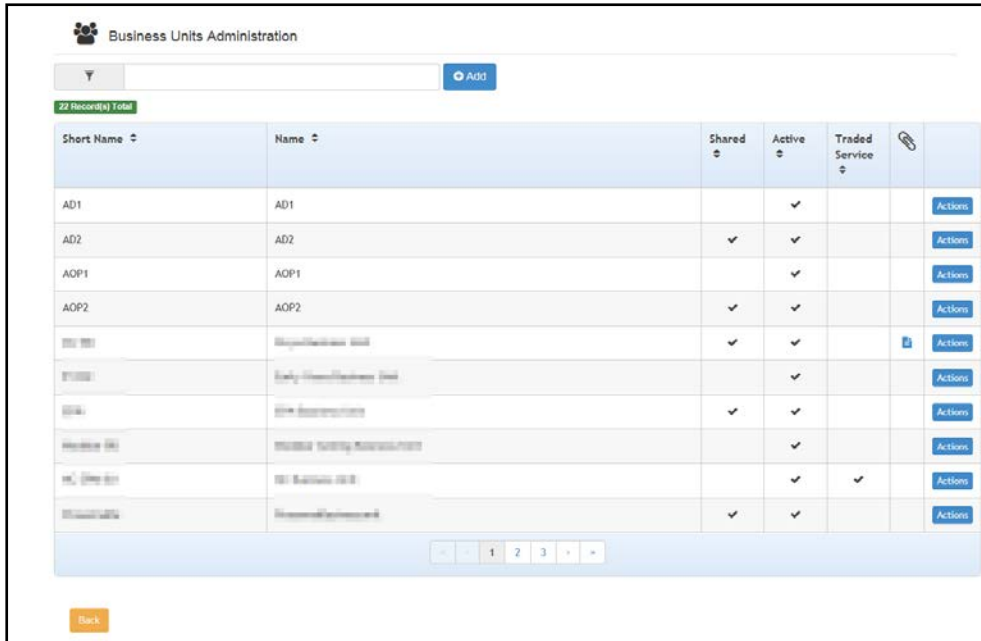
Visit Parameters (Time Element):	
Open / Close	
General Applicable	<input checked="" type="checkbox"/>
General Mandatory	<input type="checkbox"/>
Preparation Applicable	<input checked="" type="checkbox"/>
Preparation Mandatory	<input type="checkbox"/>
Travel Applicable	<input checked="" type="checkbox"/>
Travel Mandatory	<input type="checkbox"/>
On Site Applicable	<input checked="" type="checkbox"/>
On Site Mandatory	<input type="checkbox"/>
Follow Up Applicable	<input checked="" type="checkbox"/>
Follow Up Mandatory	<input type="checkbox"/>

5. Change the details as required.
6. If required, de-select the **Active** check box to make a business unit inactive.
7. Click the **Save** button.

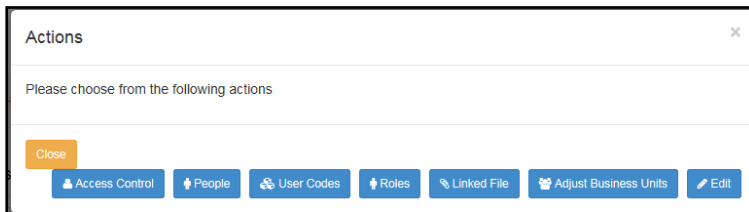
Assigning User Access to a Business Unit

User access can be set if a business unit is non-shared.

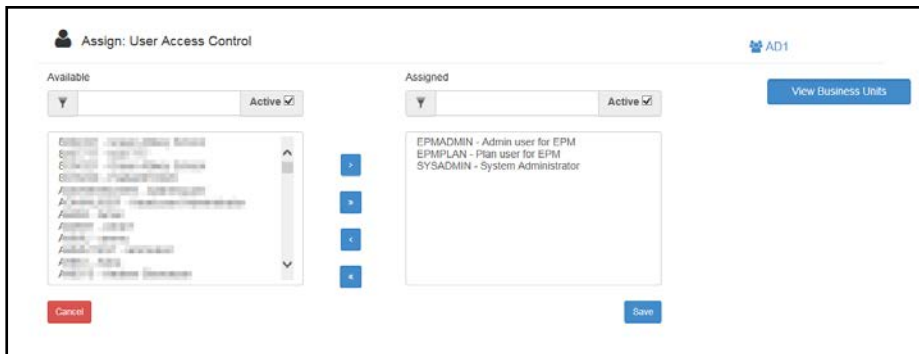
1. Display a list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.



- Click the **Actions** button adjacent to the required non-shared business unit to display the **Actions** dialog.



- Click the **Access Control** button to display the **Assign: User Access Control** page.



- Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.
- To assign a code to the current business unit, highlight the required code in the list of available codes and click the right arrow button.
- Alternatively, to assign all codes in the list, click the double arrow button.
- Click the **Save** button.

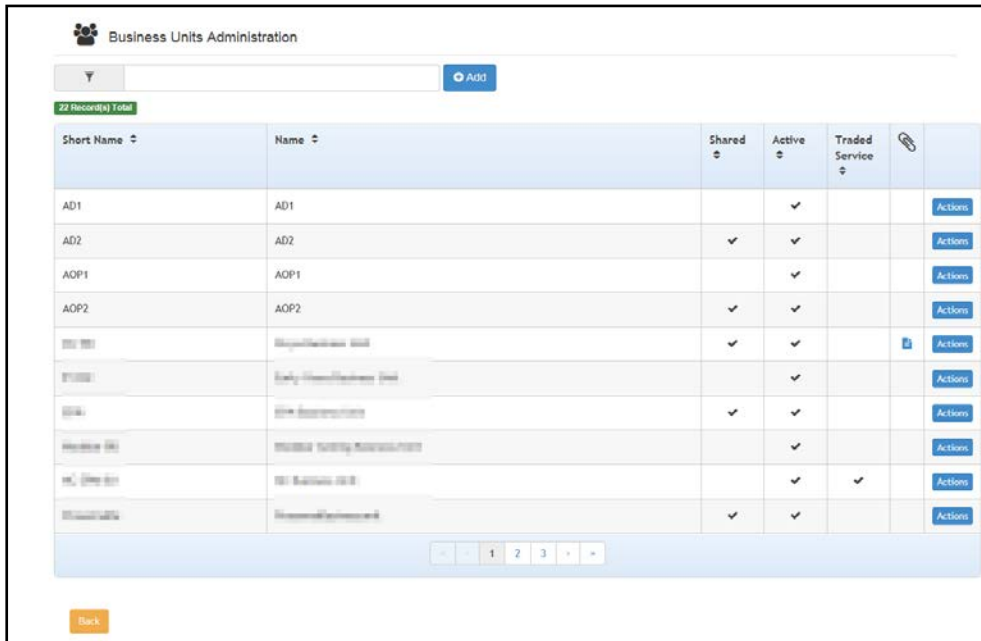
Assigning People to a Business Unit

If a business unit is not shared, one or more people can be assigned to it. However, they must already be assigned to a role that is assigned to the business unit.

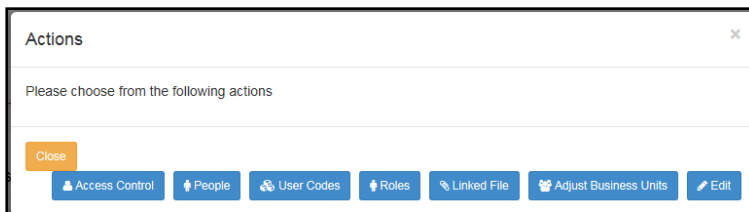
For more information, see [Assigning Roles to a Business Unit](#) on page 37.

NOTE: People are assigned to roles in the v4 Client via **Tools | Administration | Role Manager**. For more information, see [Assigning a Person to an EPM Role](#) on page 15.

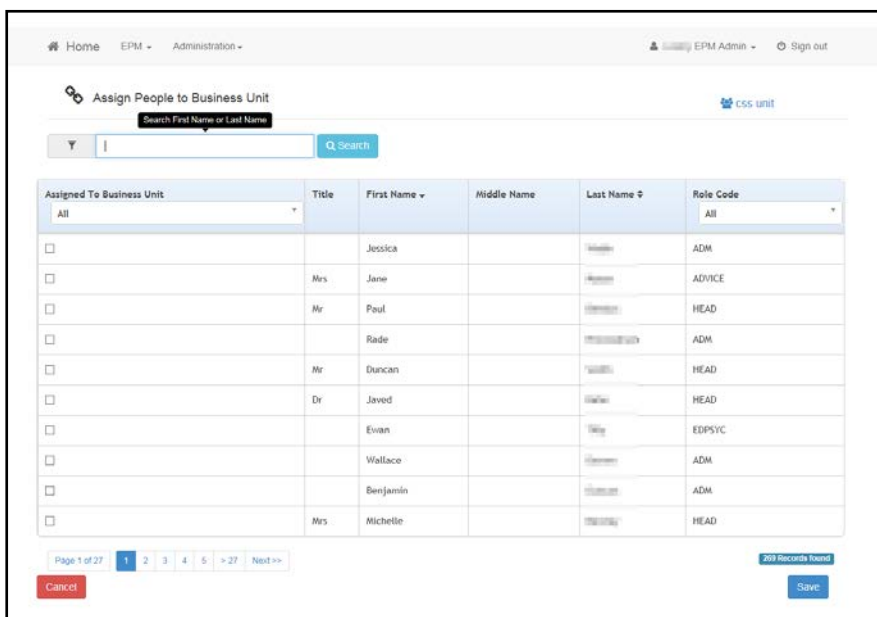
1. Display a list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.



2. Click the **Actions** button adjacent to the required non-shared business unit to display the **Actions** dialog.



3. Click the **People** button to display the **Assign People to Business Unit** page. This page lists all people who are assigned to a role that is assigned to this business unit.



4. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button to display a list of matching people.
5. If required, filter the list of people as follows:
 - a. Select an **Assigned to Business Unit** filter from the drop-down.
 - b. Select a **Role Code** from the drop-down.
6. Select the check boxes for the users you want to assign to this business unit.
7. Click the **Save** button.

Assigning a User Code to a Business Unit

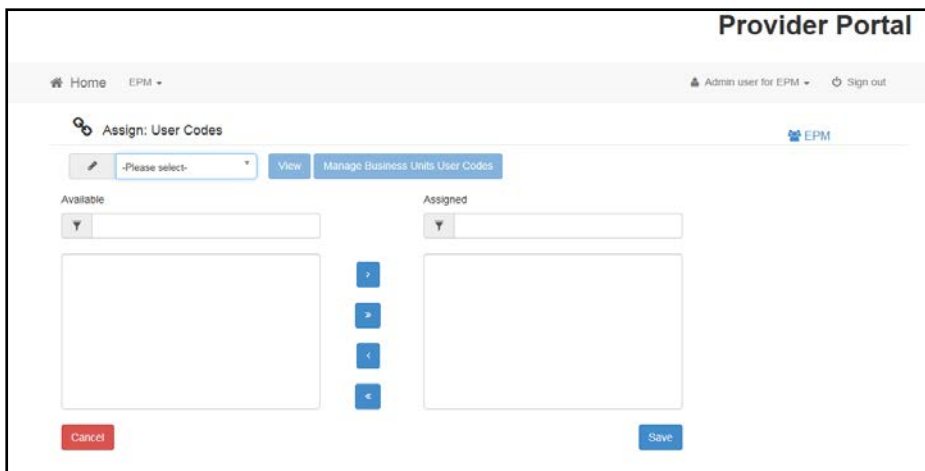
Activities, support types, target groups, focus codes, fee codes and monitoring codes can be assigned to specific business units.

When user codes are created, they are automatically assigned to the EPM business unit. You can define unit-specific lookup tables by assigning the user codes to specific business units.

For details of how to assign activities to a business unit, see [Assigning Projects and Activities to a Business Unit](#) on page 29.

To assign support types, target groups, focus codes, fee codes and monitoring codes to a business unit:

1. Display a list of business units on the **Business Units Administration** page. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.



4. Select the required lookup type from the drop-down list and click the **View** button:

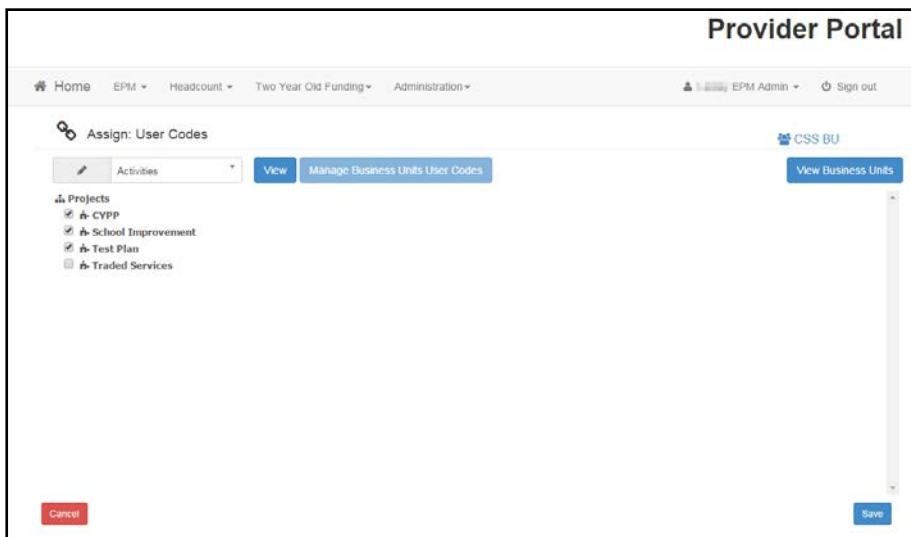


Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.

5. To assign a code to the current business unit, highlight the required code in the list of available codes and click the right arrow button.
6. Alternatively, to assign all codes in the list, click the double arrow button.
7. Click the **Save** button.

Assigning Projects and Activities to a Business Unit

1. Display a list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.
4. Select **Activities** from the drop-down.
5. Click the **View** button to display a list of available projects. Projects assigned to the business unit have the check box selected.

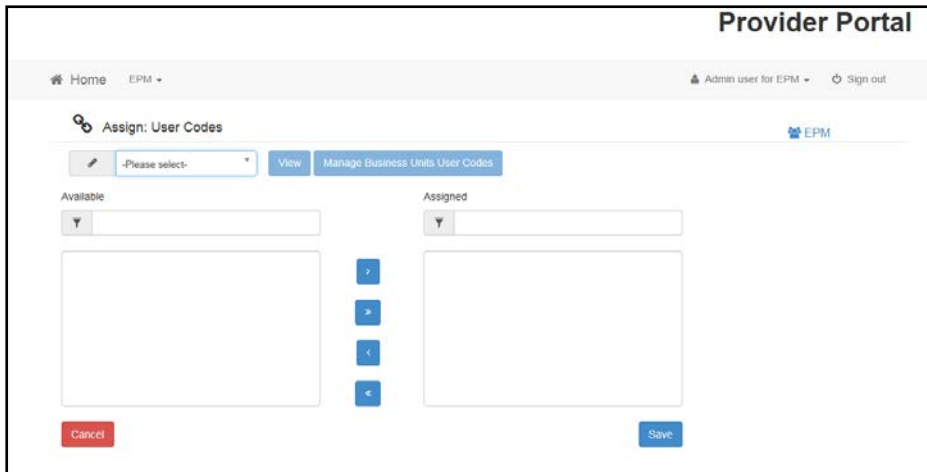


6. Select the required check box.
7. Click the **Save** button.

Viewing User Codes for a Business Unit

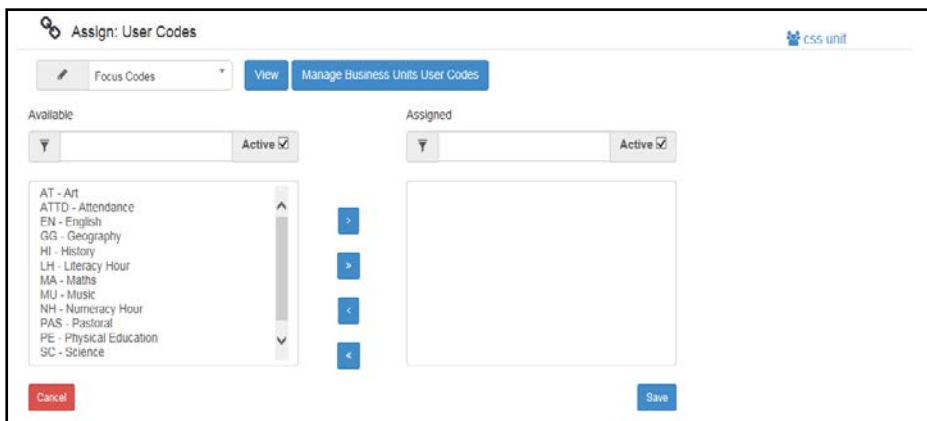
User codes can be assigned to specific business units. This enables unit-specific lookup tables to be used. The user codes assigned to the business unit can be viewed as follows:

1. Display a list of business units on the **Business Units Administration** page. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.



4. Select the required lookup type from the drop-down list and click the **View** button:
 - Activities. For more information, see [Viewing Activities Assigned to a Business Unit](#) on page 31.
 - Support Type
 - Focus Codes
 - Fee Codes
 - Monitoring Codes.

For the other types of user code, a list of **Available** and **Assigned** user codes is displayed. For example, the following graphic displays a list of **Focus Codes**.



Deselecting a User Code

To deselect (unassign) a user code from the business unit:

1. Display the available user codes. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.
Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.
2. Highlight the required code in the list of assigned codes and click the left arrow button.
3. Click the **Save** button.

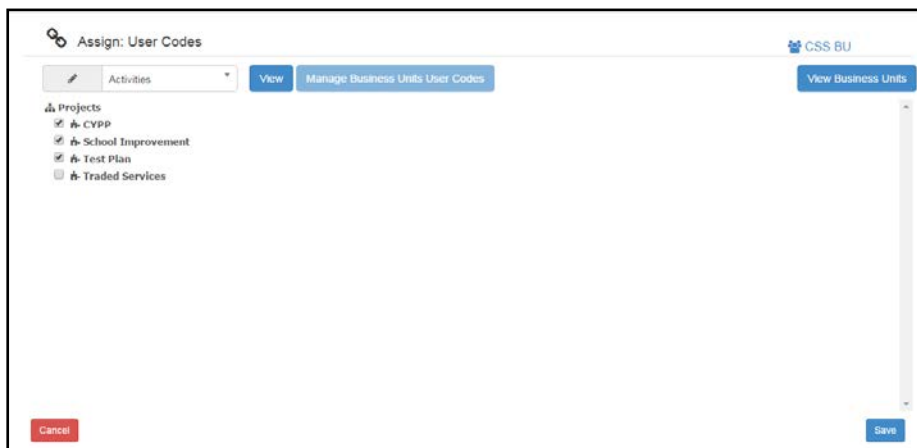
NOTES: Teaching quality, which was available in v3, is not included in EPM Provider portal. If you deselect a focus code that has a teaching quality record attached, a confirmation message is displayed. If you click the **Yes** button, the association between the teaching quality and the focus code is removed and it will not be displayed on the v3 teaching quality screen.

A user code that is attached to a school support or evaluation area record cannot be deselected.

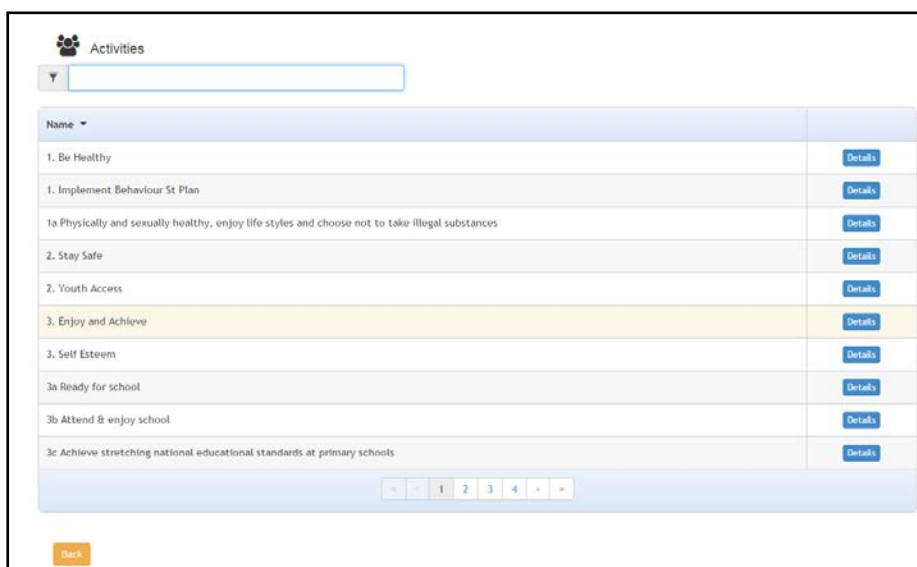
Viewing Activities Assigned to a Business Unit

A list of all activities and the associated business units can be displayed.

1. Display a list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.
4. Select **Activities** from the drop-down.
5. Click the **View** button to display a list of available projects. Projects assigned to the business unit have the check box selected.



6. Click the **View Business Units** button to display a list of **Activities**.



7. If required, click the **Details** button to see the Business Units associated with the selected activity.

Adding a New Focus Code or Support Type

Focus codes are used to specify the subject on which the support is focused. Multiple focus codes can be associated with an activity. Support types specify the type of support offered.

1. Display the available user codes. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.
2. Select either **Focus Code** or **Support Type** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes** page. The following graphics show the process for adding a new focus code although a support type can be added in a similar manner:

Code	Description	Active	Actions
AT	Art	<input checked="" type="checkbox"/>	Actions
ATTD	Attendance	<input checked="" type="checkbox"/>	Actions
EN	English	<input checked="" type="checkbox"/>	Actions
GG	Geography	<input checked="" type="checkbox"/>	Actions
HB	History	<input checked="" type="checkbox"/>	Actions
LH	Literacy Hour	<input checked="" type="checkbox"/>	Actions
MA	Maths	<input checked="" type="checkbox"/>	Actions
MU	Music	<input checked="" type="checkbox"/>	Actions
NH	Numeracy Hour	<input checked="" type="checkbox"/>	Actions
PAS	Pastoral	<input checked="" type="checkbox"/>	Actions

4. Click the **Add** button to display the user code **Add** page. For example, the following graphic displays the **Focus Codes: Add** page:

Focus Codes: Add

Code:

Description:

Active:

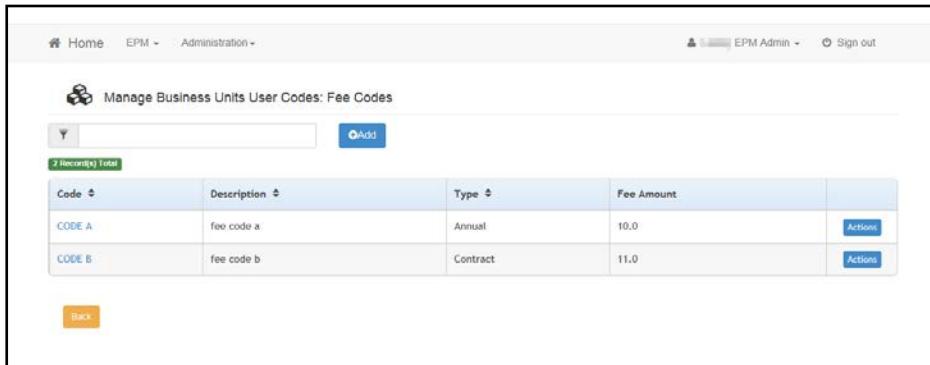
5. Enter a **Code**.
6. Enter a **Description**.
7. Click the **Save** button.

Adding a New Fee Code

Fee codes are used to define costs associated with the support offered. Fee codes include such information as the type (e.g. annual, contract, daily or fixed), the cost centre against which the cost will be recorded and the amount charged. For more information, see [Calculating the Cost of Support](#) on page 33.

1. Display the available user codes and select **Fee Code** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.

2. Select **Fee Codes** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes: Fee Codes** page.



4. Click the **Add** button to display the **Fee Codes: Add** page.

Fee Codes: Add

Code:

Description:

Type:

Fund Code:

Cost Centre:

Fee Amount:

5. Enter a **Code**.
6. Enter a **Description**.
7. Select a **Type** from the drop-down list.
8. If required, select a **Fund Code**.
9. If required, select a **Cost Centre**.
10. Enter a **Fee Amount**.
11. Click the **Save** button.

Calculating the Cost of Support

The fee type determines the calculations used to record a support cost. The following fee types and related calculations are available:

Annual

The fee is an amount per year, e.g. the annual salary of a visitor. The Fee Amount and the number of hours in a year (defined in the Support Parameters) are used to calculate an hourly rate. For more information, see [Managing Support Parameters](#) on page 21.

Hourly Rate = Fee Amount / Number of Hours in a Year

Support Cost = Hourly Rate * Elapsed Time

Contract

The fee is a fixed amount, agreed for a pre-determined contract.

Support Cost = Fee Amount.

Daily

The fee is an amount per day. The number of hours in a day (defined in the Support Parameters) is used to calculate an hourly rate. For more information, see [Managing Support Parameters](#) on page 21.

Hourly Rate = Daily Fee Code Amount / Number of Hours in a Day

Support Cost = Hourly Rate * Elapsed Time

Fixed

The fee is a fixed amount.

Support Cost = Fee Amount.

Hourly

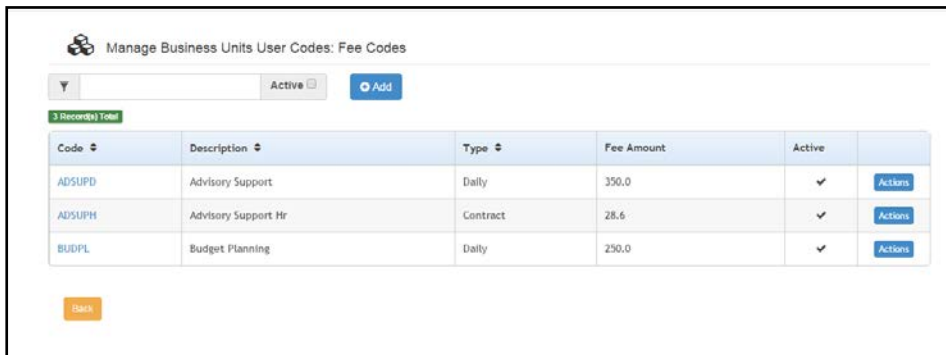
The fee is an amount per hour.

Support Cost = Fee Amount * Elapsed Time

Updating a Fee Code

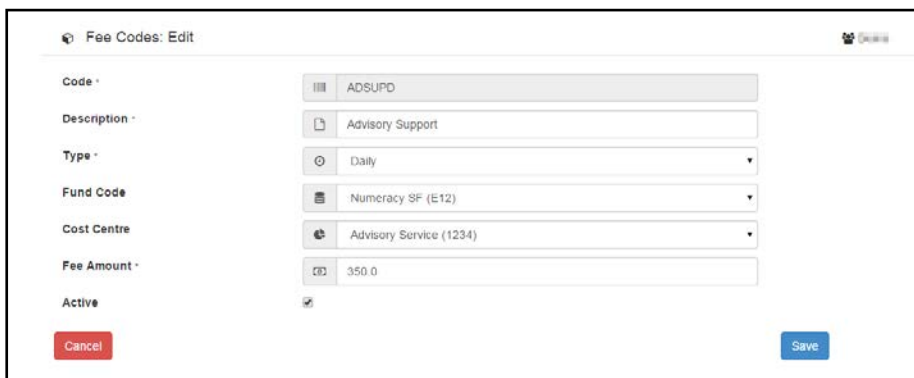
NOTE: A fee code that has sub-records attached to it cannot be deleted but can be made inactive so that it is no longer available for selection.

1. Display the available user codes and select **Fee Code** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.
2. Select **Fee Codes** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes: Fee Codes** page.



Code	Description	Type	Fee Amount	Active	Actions
ADSUPD	Advisory Support	Daily	350.0	<input checked="" type="checkbox"/>	Actions
ADSUPH	Advisory Support Hr	Contract	28.6	<input checked="" type="checkbox"/>	Actions
BUDFL	Budget Planning	Daily	250.0	<input checked="" type="checkbox"/>	Actions

4. Click the **Actions** button to display the **Actions** dialog.
5. Click the **Edit** button to display the **Fee Codes: Edit** page.



Fee Codes: Edit

Code: ADSUPD

Description: Advisory Support

Type: Daily

Fund Code: Numeracy SF (E12)

Cost Centre: Advisory Service (1234)

Fee Amount: 350.0

Active:

Buttons: Cancel, Save

6. Update the required fields.

To make the code inactive, deselect the **Active** check box.

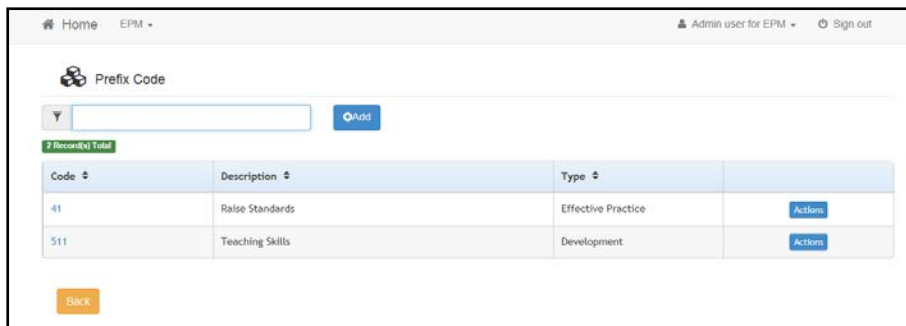
7. Click the **Save** button.

Adding a New Monitoring Code or Prefix Code

Monitoring codes are used in the monitoring of Areas of Effective Practice and Areas for Development. Monitoring codes consist of a prefix code followed by a monitoring code. A prefix code is used to group monitoring codes together, further subdividing the area of effective practice or development.

Adding a New Prefix Code

1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page 29 .
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.

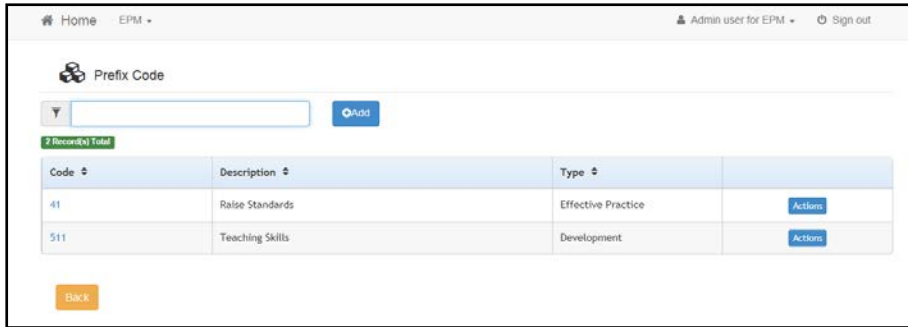


3. Click the **Add** button to display the **Prefix Code: Add** page.

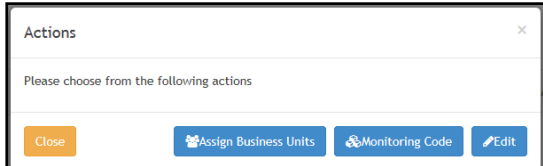
4. Enter a **Prefix Code** (maximum 3 digits).
5. Enter a **Description**.
6. Select a **Code Type** radio button.
7. Click the **Save** button.

Adding a Monitoring Code

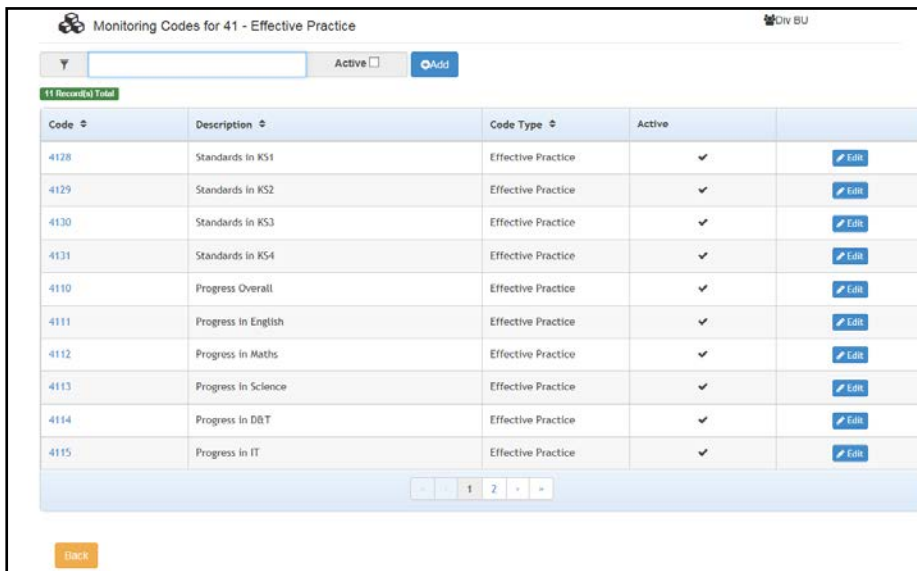
1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.



- Click the **Actions** button adjacent to the required prefix code to display the **Actions** dialog.



- Click the **Monitoring Code** button to display the **Monitoring Codes** page.



- Click the **Add** button to display the **Monitoring Codes: Add** page.

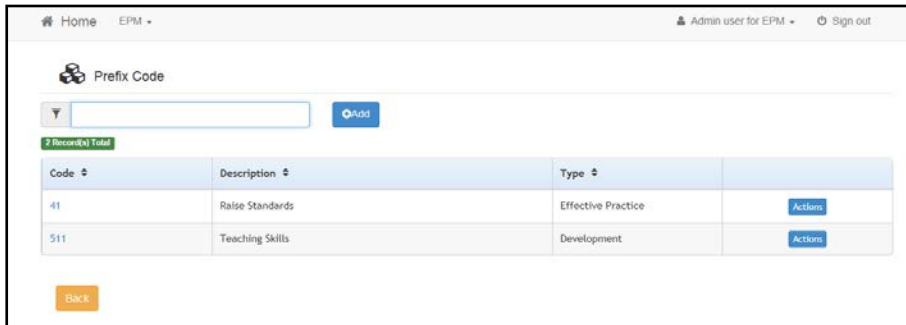


- Enter a **Code** (maximum 3 characters).
- Enter a **Description**.
- Click the **Save** button.

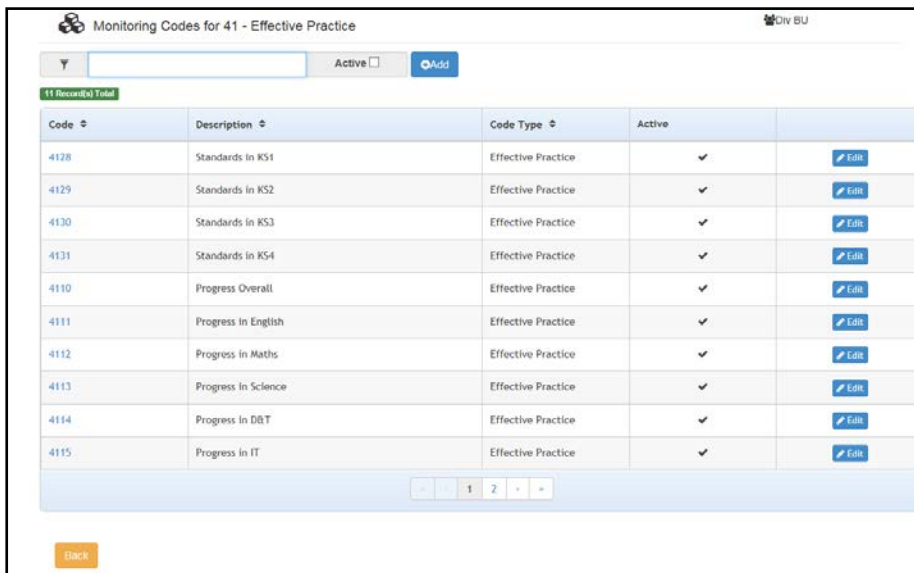
Updating a Monitoring Code

NOTE: A monitoring code that has sub-records attached to it cannot be deleted but can be made inactive so that it is no longer available for selection.

1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page 29.
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.



3. Click the **Actions** button adjacent to the required code to display the **Actions** dialog.
4. Click the **Monitoring Code** button to display the **Monitoring Codes** page.



5. Click the **Edit** button to display the **Monitoring Code: Edit** page.



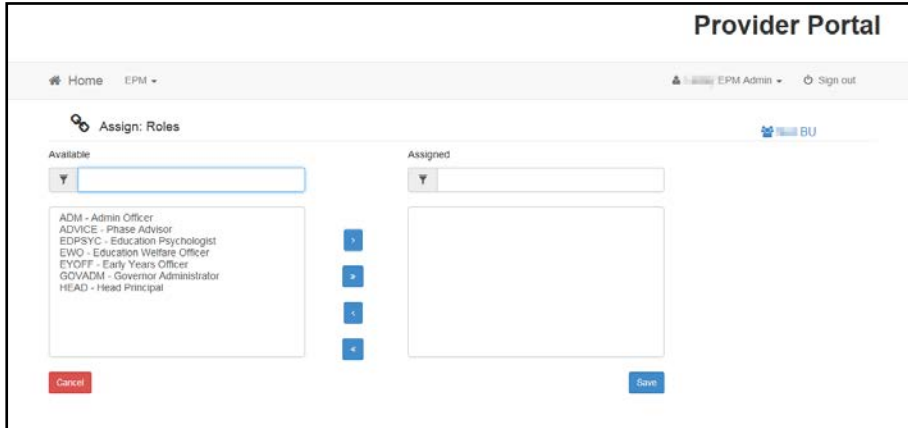
6. If required, enter a new **Description**.
7. If required, to make the monitoring code inactive, de-select the **Active** check box.
8. Click the **Save** button.

Assigning Roles to a Business Unit

You can assign user roles to specific business units. This enables the roles to be associated with people at the business unit.

EPM Administration

1. Select the required business unit. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Roles** button to display the **Assign: Roles** page with a list of **Available** roles and already **Assigned** roles.



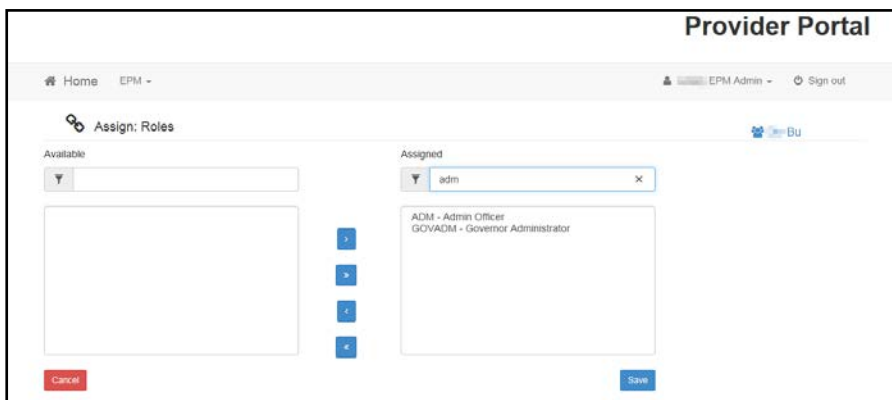
Arrows are available to move the roles from **Available** to **Assigned** or vice versa.

4. If required enter a partial role to filter either list.
5. Highlight the required role in the **Available** list and click the right arrow to move it to the **Assigned** list.
6. Click the **Save** button.

Removing Roles from a Business Unit

Assigned roles can be removed from a business unit and moved to the list of available roles.

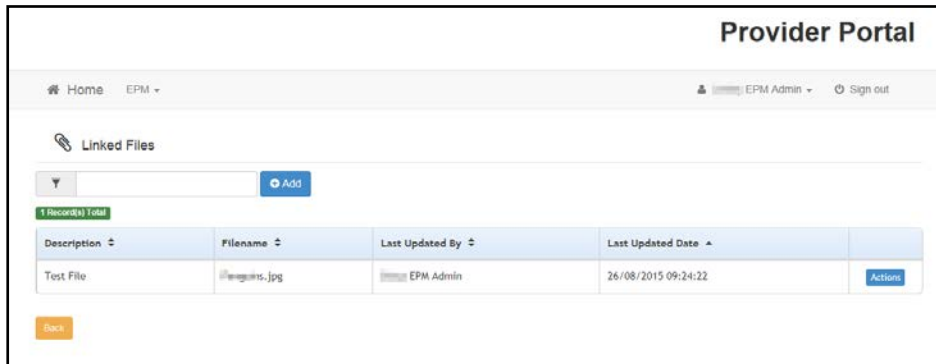
1. Select the required business unit. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Roles** button to display the **Assign: Roles** page with a list of **Available** roles and already **Assigned** roles.
4. If required enter a partial role to filter either list.



5. Highlight the required role in the **Assigned** list and click the left arrow to move it to the **Available** list.
6. Click the **Save** button.

Adding a Linked File to a Business Unit

1. Select the required business unit. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Linked File** button to display the **Linked Files** page.

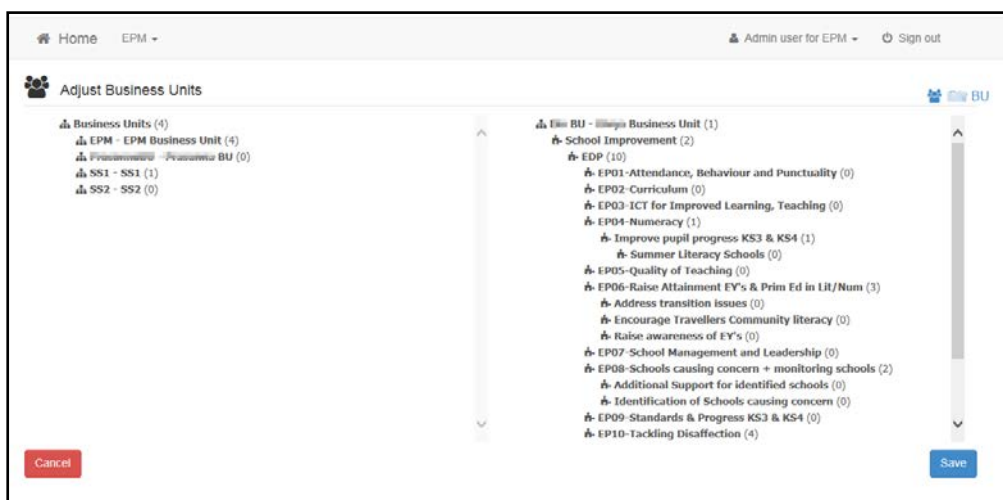


4. Click the **Add** button to display the **Linked Files** dialog.
5. Enter a **Description**.
6. Click the **Select File** button to display the **Choose File to Upload** dialog and choose the required file.
7. Click the **Save** button.

Adjusting Business Units

The Adjust Business Units functionality enables you to include additional EPM activities in a business unit.

1. Display the list of business units. For more information, see [Displaying a List of Business Units](#) on page 22.
2. Click the **Actions** button adjacent to the business unit that you wish to adjust.
3. Click the **Adjust Business Units** button to display the **Adjust Business Units** page.

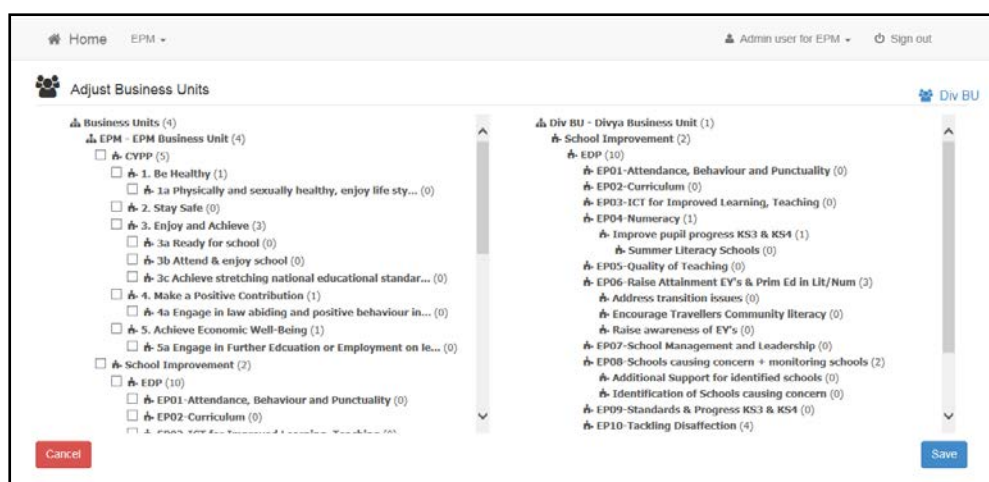


The list on the left-hand side displays all business units and all EPM records under those business units.

EPM Administration

The right-hand side displays the current business unit and a list of EPM records currently selected.

- Click the button adjacent to a business unit on the left-hand side to expand the list of records beneath it, as shown in the following graphic:



- Select the check boxes for the activities on the left-hand side that you wish to include in the current business unit to display the message:

Do you want to move all of the associated EPM records for the selected activity to this business unit?

- Click the **Yes** button.
- Click the **Save** button.

Managing Business Units User Codes

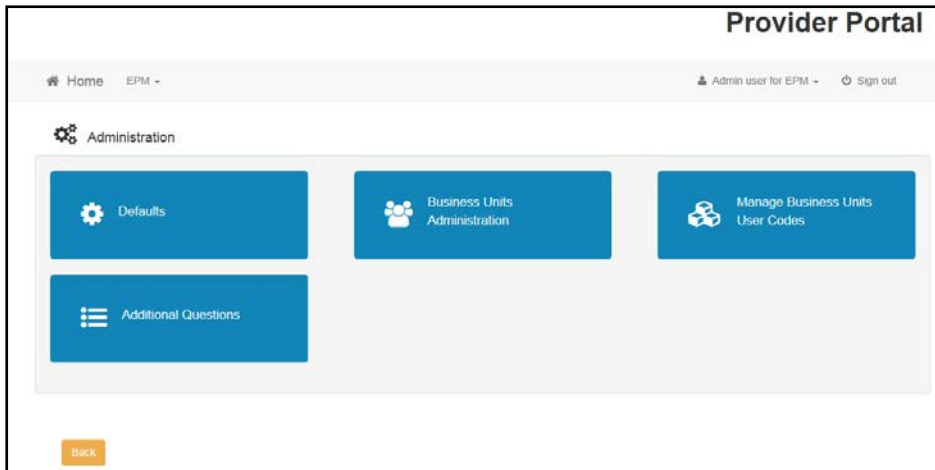
Introduction

This functionality enables you to define user codes to be used in EPM and assign them to the required business units. The types of user code are support types, focus codes, fee codes and monitoring codes.

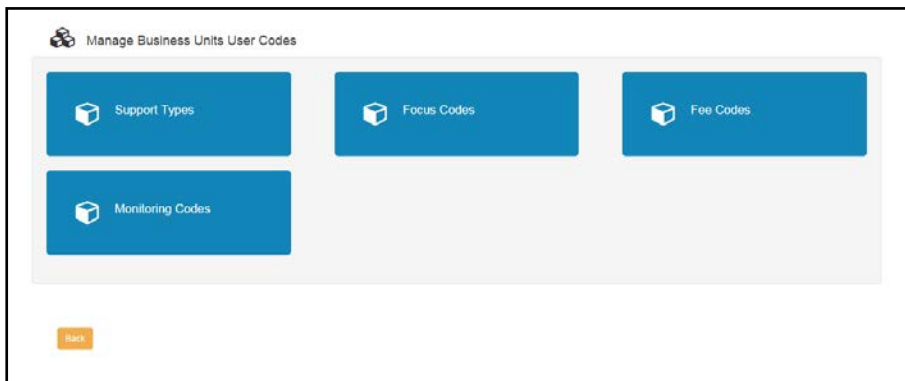
NOTE: Support types and focus codes are automatically added to the EPM business unit. The required business unit can be selected for a new fee code or monitoring code.

Displaying User Codes

- Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.



- Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes** page.



- Click the required button to display a list of available user codes.

Managing Support Types

NOTE: Support types are automatically assigned to the EPM business unit.

Viewing Support Types

- Display a list of available user codes. For more information, see [Displaying User Codes](#) on page 40.
- Click the **Support Types** button to display a list of available support types.

Code	Description	Active	Actions
AI	Assess/Inclusion	✓	Actions
AL	al	✓	Actions
LCLIBR	Letter received Curriculum	✓	Actions
LSUIPP	Letter received Support	✓	Actions
MDEPT	Meeting with Department	✓	Actions
MGTEAC	Meeting Group of Teachers	✓	Actions
MHEAD	Meeting with Head	✓	Actions
MITEAC	Meeting Individual Teacher	✓	Actions
MSMT	Meeting Senior Management Team	✓	Actions
OBS	Observing Classes	✓	Actions

Adding a Support Type

1. Display a list of available support types. For more information, see [Viewing Support Types](#) on page 41.
2. Click the **Add** button to display the **Support Types: Add** page.

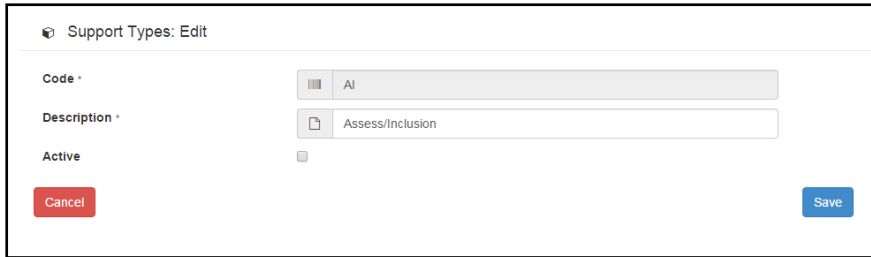
3. Enter a **Code** and **Description**.
4. Click the **Save** button.

Editing a Support Type

The **Description** and **Active** status of the support type can be amended.

1. Display a list of available support types. For more information, see [Viewing Support Types](#) on page 41.
2. Click the **Actions** button adjacent to the support type that you want to edit to display the **Actions** dialog.

3. Click the **Edit** button to display the **Support Types: Edit** page.

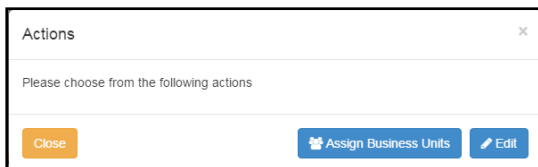


4. Make the required changes and click the **Save** button.

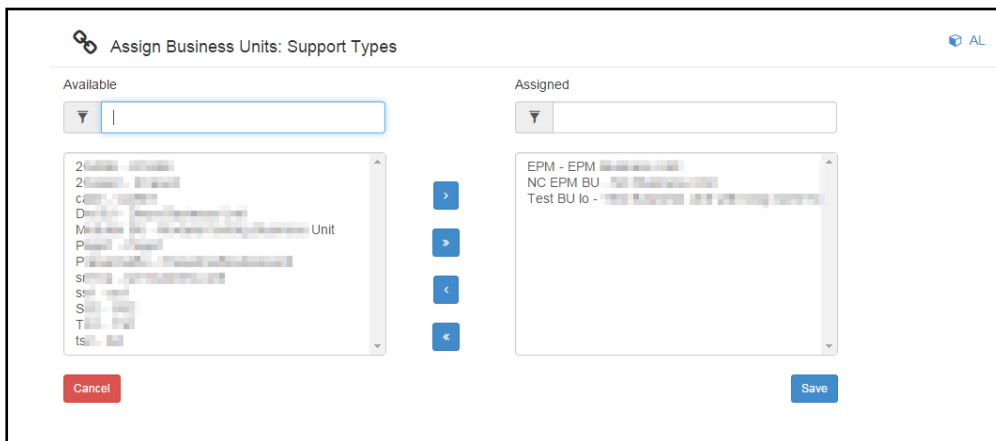
Assigning Business Units to a Support Type

A support type is automatically attached to the EPM business unit. Other business units can be assigned to the support type as follows:

1. Display a list of available support types. For more information see [Viewing Support Types](#) on page 41.
2. Click the **Actions** button adjacent to the support type that you want to edit to display the **Actions** dialog.



3. Click the **Assign Business Units** button to display the **Assign Business Units: Support Types** page. A list of **Available** business units and **Assigned** business units for the selected support type is displayed.



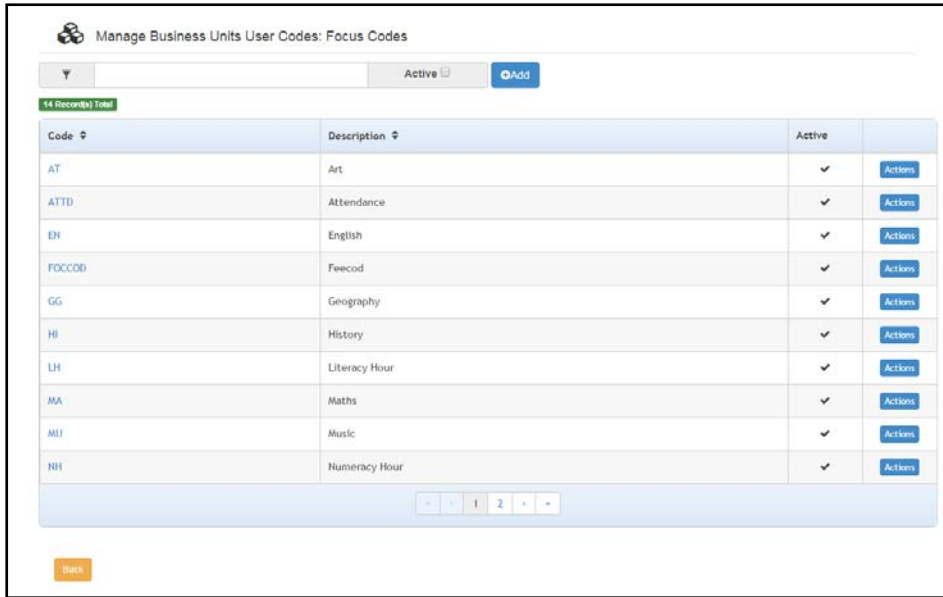
4. Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
5. Click the **Save** button.

Managing Focus Codes

NOTE: Focus codes are automatically assigned to the EPM business unit.

Viewing Focus Codes

1. Display a list of available user codes. For more information, see [Displaying User Codes](#) on page 40.
2. Click the **Focus Codes** button to display a list of available focus codes.



Adding a Focus Code

1. Display a list of available focus codes. For more information, see [Viewing Focus Codes](#) on page 43.
2. Click the **Add** button to display the **Focus Codes: Add** page.
3. Enter a **Code** and **Description**.

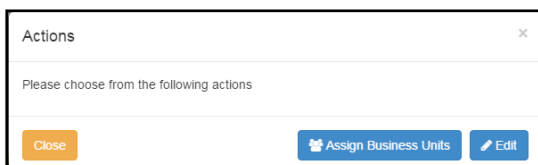


4. Click the **Save** button.

Editing a Focus Code

The **Description** and **Active** status of the focus code can be amended.

1. Display a list of available focus codes. For more information, see [Viewing Focus Codes](#) on page 43.
2. Click the **Actions** button adjacent to the focus code that you want to edit to display the **Actions** dialog.

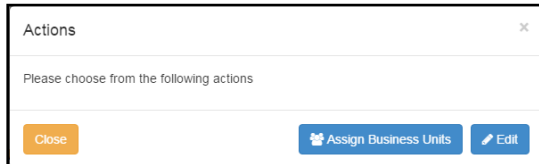


3. Click the **Edit** button to display the **Focus Codes: Edit** page.
4. Make the required changes and click the **Save** button.

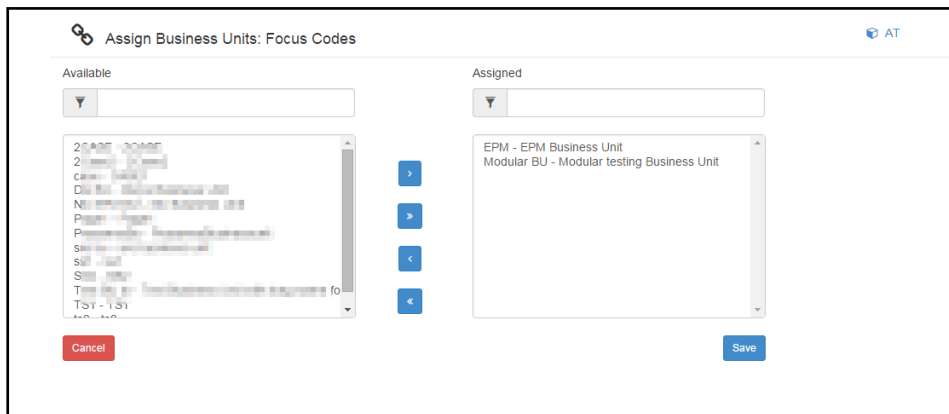
Assigning Business Units to a Focus Code

Focus codes are automatically attached to the EPM business unit. Other business units can be assigned to the focus code as follows:

1. Display a list of focus codes. For more information, see [Viewing Focus Codes](#) on page 43.
2. Click the **Actions** button adjacent to the focus code that you want to edit to display the **Actions** dialog.



3. Click the **Assign Business Units** button to display the **Assign Business Units: Focus Codes** page. A list of **Available** business units and **Assigned** business units for the selected support type is displayed.



4. Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
5. Click the **Save** button.

Managing Fee Codes

NOTE: Fee codes can be assigned to any business unit.

Viewing Fee Codes

1. Display a list of available user codes. For more information, see [Displaying User Codes](#) on page 40.
2. Click the **Fee Codes** button to display a list of available fee codes.

Code	Description	Type	Fee Amount	Active	Actions
ADSDPD	Advisory Support	Daily	350.0	✓	Actions
ADSDPH	Advisory Support Hr	Contract	28.6	✓	Actions
BUDPL	Budget Planning	Daily	250.0	✓	Actions
CONT	Contract Unit	Contract	1.0	✓	Actions
CORE	Core Activity	Daily	1.0	✓	Actions
FEECOD	Feeecod	Annual	15.0	✓	Actions
ICT	ICT Tutor	Annual	24000.0	✓	Actions
NDEF	Not defined	Contract	150.0	✓	Actions
REB	Rebels	Hourly	10.0	✓	Actions
SLA1	SLA - Primary School	Contract	2000.0	✓	Actions

Adding a Fee Code

1. View a list of available fee codes. For more information, see [Viewing Fee Codes](#) on page 45.
2. Select a business unit from the drop-down.
3. Click the **Add** button to display the **Fee Codes: Add** page.

4. Enter a **Code** and **Description**.
5. Select a **Type** from the drop-down.
6. If required, select a **Fund Code**.
7. If required, select a **Cost Centre**.
8. Enter a **Fee Amount**.
9. Click the **Save** button.

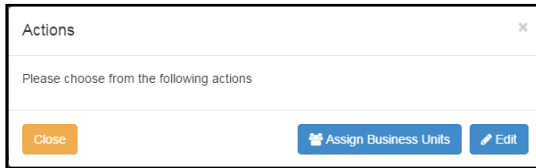
Editing a Fee Code

The **Description**, **Type**, **Fund Code**, **Cost Centre**, **Fee Amount** and **Active** status can be amended.

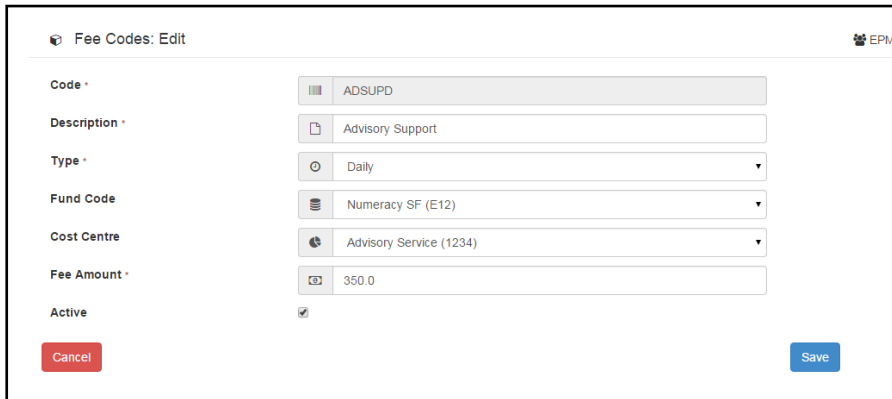
NOTE: If a fee code is inactive, it is not displayed in the School Support area.

1. View a list of available fee codes. For more information, see [Viewing Fee Codes](#) on page 45.

- Click the **Actions** button adjacent to the fee code that you want to edit to display the **Actions** dialog.



- Click the **Edit** button to display the **Fee Codes: Edit** page.

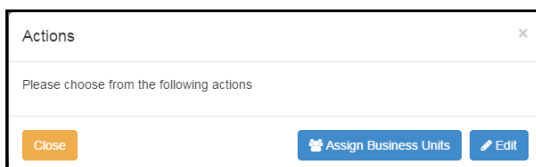


- Make the required changes.
- If required, deselect the **Active** check box to make the fee code inactive.
- Click the **Save** button.

Assigning Business Units to a Fee Code

A fee code is attached to a business unit when it is added. Other business units can be assigned to the fee code as follows:

- View a list of available fee codes. For more information, see [Viewing Fee Codes](#) on page 45.
- Click the **Actions** button adjacent to the fee code that you want to edit to display the **Actions** dialog.



- Click the **Assign Business Units** button to display the **Assign Business Units: Fee Codes** page.
- Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
- Click the **Save** button.

Managing Monitoring Codes

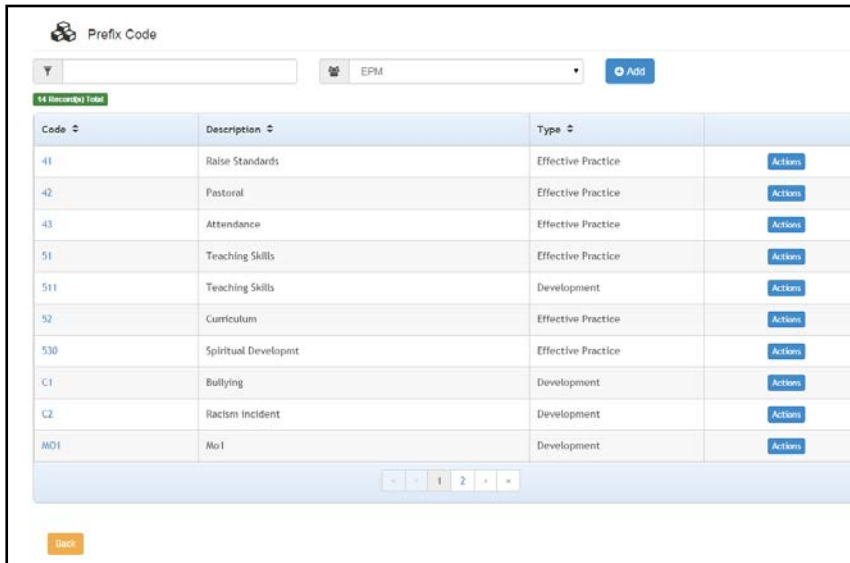
NOTE: Monitoring codes can be assigned to any business unit.

Viewing Monitoring Codes

Monitoring codes are used to monitor Effective Practice or Development and consist of a **Prefix Code** and a **Description**.

EPM Administration

1. Display a list of available user codes. For more information, see [Displaying User Codes](#) on page 40.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.



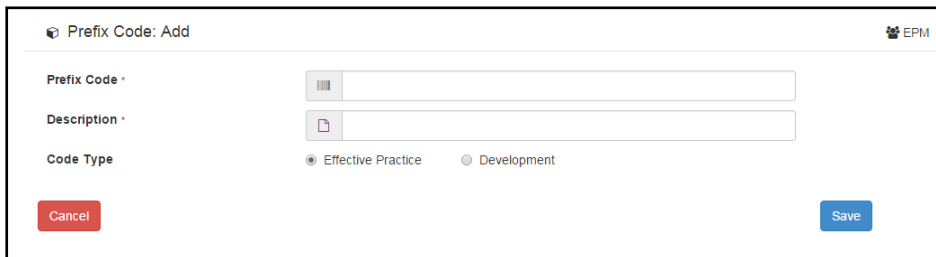
The screenshot shows a web interface titled "Prefix Code". At the top, there is a search bar, a dropdown menu set to "EPM", and an "Add" button. Below this, a table lists 14 records. Each row contains a Code, a Description, a Type, and an Actions button. The records are as follows:

Code	Description	Type	Actions
41	Raise Standards	Effective Practice	Actions
42	Pastoral	Effective Practice	Actions
43	Attendance	Effective Practice	Actions
51	Teaching Skills	Effective Practice	Actions
511	Teaching Skills	Development	Actions
52	Curriculum	Effective Practice	Actions
530	Spiritual Developmt	Effective Practice	Actions
C1	Bullying	Development	Actions
C2	Racism Incident	Development	Actions
MD1	Mo I	Development	Actions

At the bottom of the table, there are pagination controls showing "1" and "2". A "Back" button is located at the bottom left of the interface.

Adding a Prefix Code

1. View a list of available prefix codes. For more information, see [Viewing Monitoring Codes](#) on page 47.
2. Select the required business unit from the drop-down.
3. Click the **Add** button to display the **Prefix Code: Add** page.

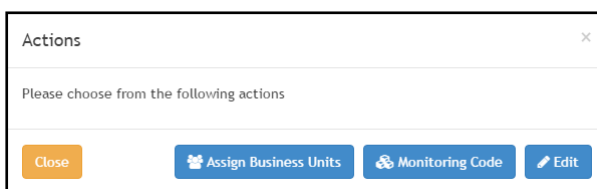


The screenshot shows the "Prefix Code: Add" form. It has a title bar with "Prefix Code: Add" and "EPM". The form contains three input fields: "Prefix Code", "Description", and "Code Type". The "Code Type" field has two radio buttons: "Effective Practice" (selected) and "Development". At the bottom, there are "Cancel" and "Save" buttons.

4. Enter a **Prefix Code** and **Description**.
5. Select either the **Effective Practice** or **Development** radio button.
6. Click the **Save** button.

Editing a Prefix Code

1. Display a list of available codes. For more information, see [Viewing Monitoring Codes](#) on page 47.
2. Click the **Actions** button adjacent to the prefix code that you want to edit to display the **Actions** dialog.



The screenshot shows the "Actions" dialog box. It has a title bar with "Actions" and a close button. The main area contains the text "Please choose from the following actions". At the bottom, there are four buttons: "Close", "Assign Business Units", "Monitoring Code", and "Edit".

3. Click the **Edit** button to display the **Prefix Code: Edit** page.

Prefix Code: Edit

Prefix Code: 41

Description: Raise Standards

Code Type: Effective Practice Development

Cancel Save

4. Make the required changes and click the **Save** button.

Adding a Monitoring Code

Add a new monitoring code to a prefix code as follows:

1. Display a list of available codes. For more information, see [Viewing Monitoring Codes](#) on page 47.
2. Click the **Actions** button adjacent to the prefix code that you want to edit to display the **Actions** dialog.

Actions

Please choose from the following actions

Close Assign Business Units Monitoring Code Edit

3. Click the **Monitoring Code** button to display the list of **Monitoring Codes** for the selected **Prefix Code**.

Monitoring Codes for 41 - Effective Practice

Active Add

11 Records Total

Code	Description	Code Type	Active	
4128	Standards in KS1	Effective Practice	✓	Edit
4129	Standards in KS2	Effective Practice	✓	Edit
4130	Standards in KS3	Effective Practice	✓	Edit
4131	Standards in KS4	Effective Practice	✓	Edit
4110	Progress Overall	Effective Practice	✓	Edit
4111	Progress in English	Effective Practice	✓	Edit
4112	Progress in Maths	Effective Practice	✓	Edit
4113	Progress in Science	Effective Practice	✓	Edit
4114	Progress in D&T	Effective Practice	✓	Edit
4115	Progress in IT	Effective Practice	✓	Edit

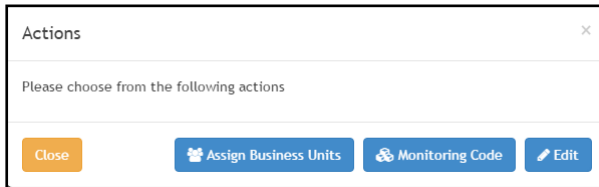
Back

4. Click the **Add** button to display the **Monitoring Code: Add** page.
5. Enter a new **Monitoring Code** and **Description**.
6. Click the **Save** button.

Editing a Monitoring Code

The description and active status of a monitoring code can be updated.

1. Display a list of available user codes. For more information, see [Viewing Monitoring Codes](#) on page 47.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.
3. Click the **Actions** button adjacent to the monitoring code that you want to edit to display the **Actions** dialog.



4. Click the **Monitoring Code** button to display the list of **Monitoring Codes** for the selected **Prefix Code**.

Code	Description	Code Type	Active	
4128	Standards in KS1	Effective Practice	✓	Edit
4129	Standards in KS2	Effective Practice	✓	Edit
4130	Standards in KS3	Effective Practice	✓	Edit
4131	Standards in KS4	Effective Practice	✓	Edit
4110	Progress Overall	Effective Practice	✓	Edit
4111	Progress in English	Effective Practice	✓	Edit
4112	Progress in Maths	Effective Practice	✓	Edit
4113	Progress in Science	Effective Practice	✓	Edit
4114	Progress in D&T	Effective Practice	✓	Edit
4115	Progress in IT	Effective Practice	✓	Edit

5. Click the **Edit** button to display the **Monitoring Code: Edit** page.

Monitoring Code: Edit

Code *

Description *

Active

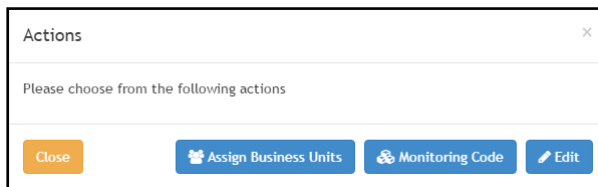
[Cancel](#) [Save](#)

6. If required, update the **Description**.
7. If required, deselect the **Active** check box to make the code inactive.
8. Click the **Save** button.

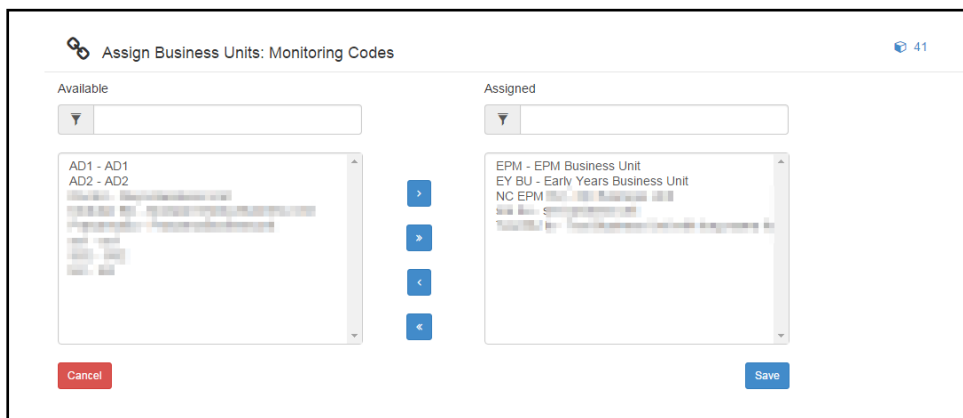
Assigning Business Units to a Monitoring Code

Monitoring codes are attached to a specific business unit when they are added. Other business units can be assigned to a monitoring code as follows:

1. Display a list of available user codes. For more information, see [Viewing Monitoring Codes](#) on page 47.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.
3. Click the **Actions** button adjacent to the monitoring code that you want to edit to display the **Actions** dialog.



4. Click the **Assign Business Units** button to display the **Assign Business Units: Monitoring Codes** page.



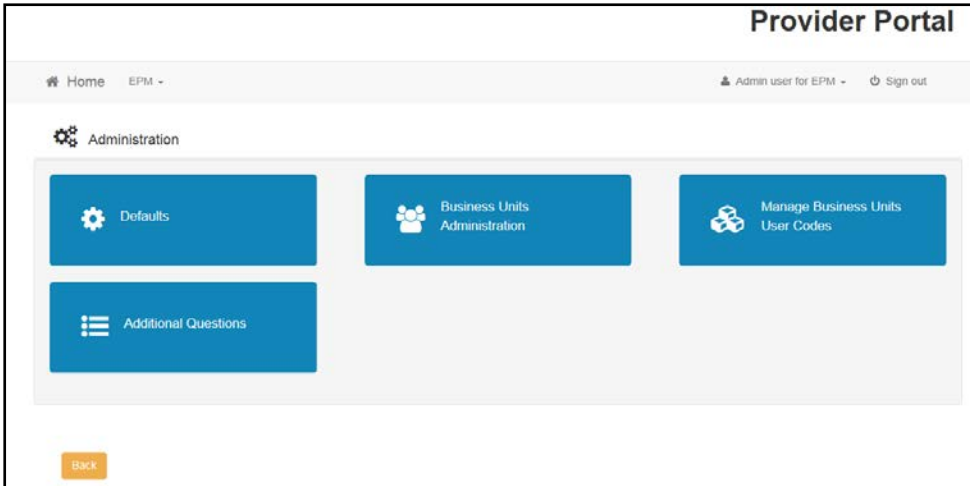
5. Use the arrows to move business units from **Available** to **Assigned**.
6. Click the **Save** button.

Setting Up Additional Questions

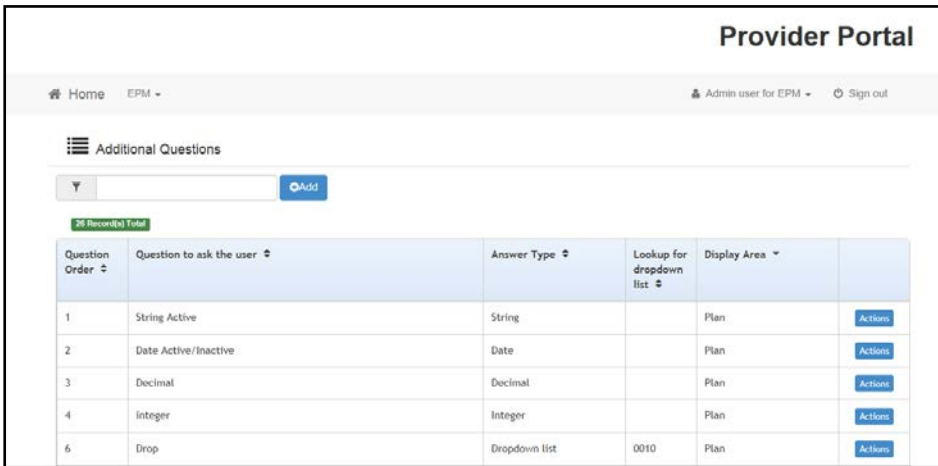
Additional questions enable user defined information to be recorded. They are not specific to a business unit, but are set up to be displayed and answered in a particular area e.g. Plan or School Support. They are set up in the Administration area.

Viewing Additional Questions

1. Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.



2. Click the **Additional Questions** button to display the **Additional Questions** page with a list of existing additional questions.



Adding an Additional Question

1. View the existing additional questions. For more information, see [Viewing Additional Questions](#) on page 51.
2. Click the **Add** button to display the **Additional Questions: Add** page.



3. Select an **Answer Type** from the drop-down list.
4. Enter the **Question to ask the user**.
5. Enter the **Question Order** which determines the order in which questions are displayed.
6. Select the **Display Area** from the drop-down list of areas where additional questions can be answered.

7. Click the **Save** button.

Editing an Additional Question

The details can be updated and a question can be made inactive so that it is no longer displayed. An inactive question can be made active.

1. View the additional questions. For more information, see [Viewing Additional Questions](#) on page 51.
2. Click the **Actions** button adjacent to the question that you want to edit to display the **Actions** dialog.
3. Click the **Edit** button to display the **Additional Questions: Edit** page.

The screenshot shows a form titled "Additional Questions: Edit - Date of Inspection". It has the following fields and values:

- Answer Type:** Date
- Question to ask the user:** Date of Inspection
- Question Order:** 1
- Display Area:** Plan
- Active:**

At the bottom of the form, there are two buttons: a red "Cancel" button on the left and a blue "Save" button on the right.

4. Edit the fields as required.
5. If required, select or de-select the **Active** check box.
6. Click the **Save** button.

Deleting an Additional Question

If an additional question is no longer required, it can be deleted along with any answers associated with it.

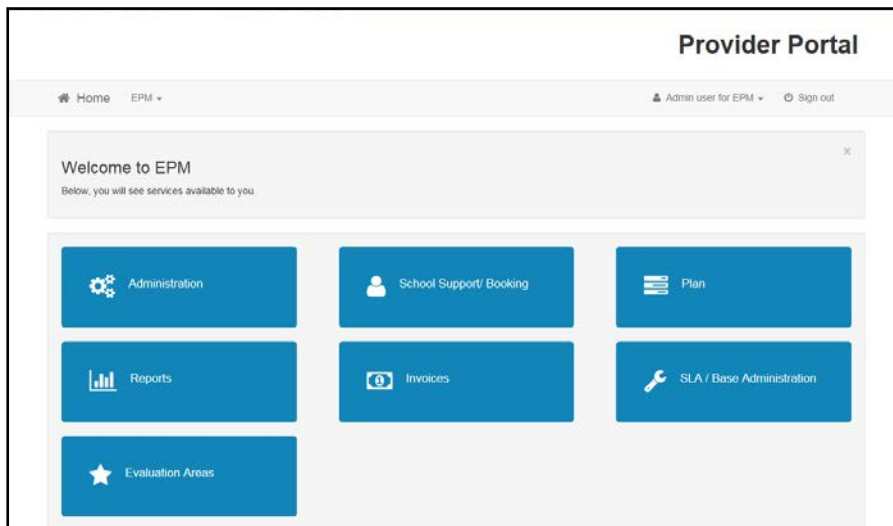
NOTE: Alternatively, you can make an additional question inactive so that it is no longer displayed. See [Editing an Additional Question](#) on page 53.

1. View the additional questions. For more information, see [Viewing Additional Questions](#) on page 51.
2. Click the **Actions** button adjacent to the question that you want to delete to display the **Actions** dialog.
3. Click the **Delete** button. A confirmation message is displayed.
4. Click the **Yes** button to confirm.

06 / Managing School Support

Introduction

School support is accessed via the **School Support / Booking** tile on the **Welcome to EPM** page.



Managing School Support Booking Details

Introduction

You can manage school support bookings for shared business units and those to which you have been assigned. For more information, see [Assigning People to a Business Unit](#) on page 26.

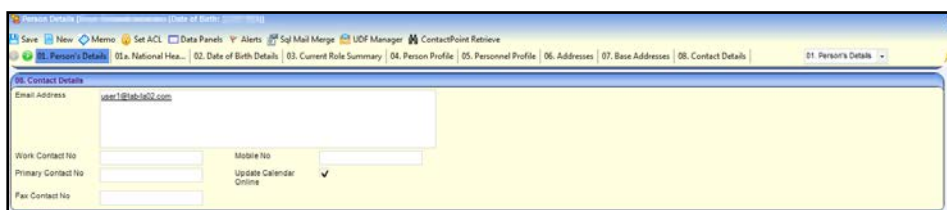
School support visits are booked and associated actions, costs and linked files are recorded.

NOTE: The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.

A diary facility provides integration of support recording with MS Outlook. For more information, see [Managing the Diary for School Support](#) on page 63.

NOTE: All users should be mapped to either a person or a base. For more information, see [Mapping a User to a Person](#) on page 14 and [Mapping a User to a Base](#) on page 15.

Mapping a user to a person enables appointments to be added to their Outlook calendar. The link to the appropriate calendar in Outlook is via the person's e-mail address, recorded in the v4 Client on the **Person Basic Details | Contact Details** panel.

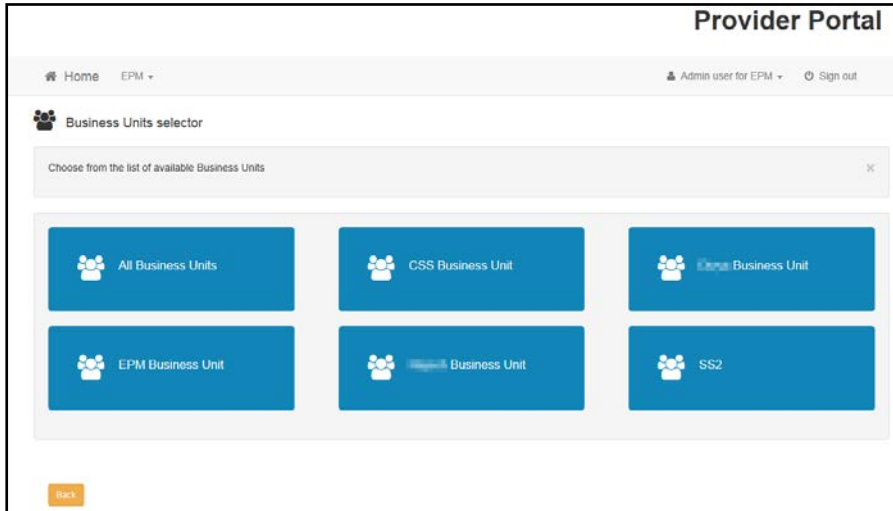


For more information, see [Setting Up the Link to Outlook](#) on page 16.

Selecting a Business Unit for School Support

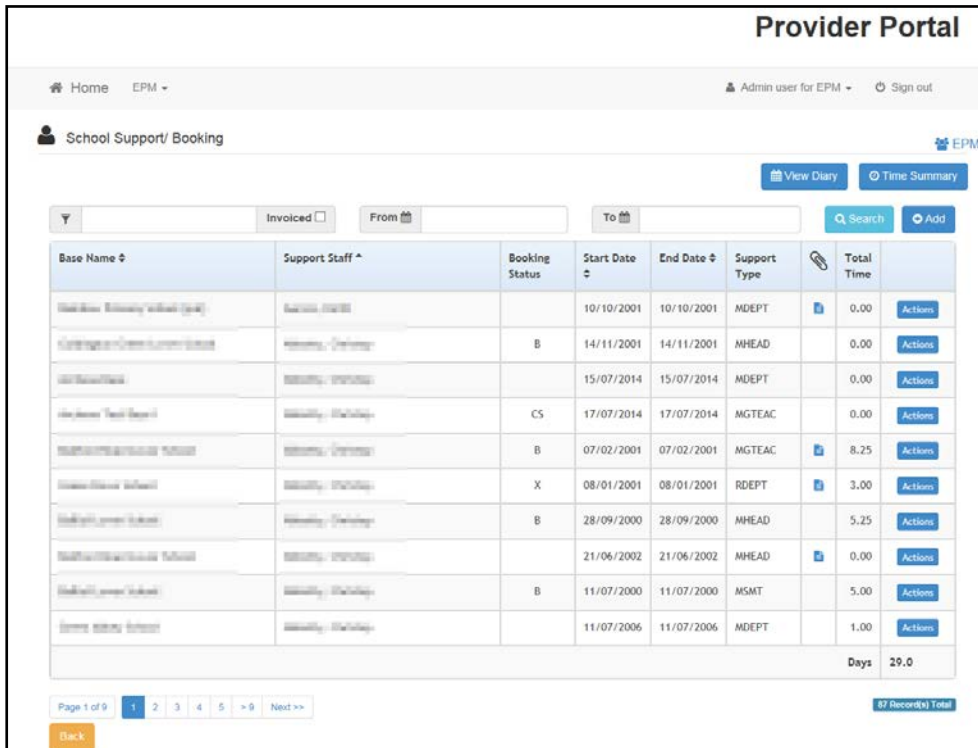
School support bookings can be managed for the business units to which you have access. For more information, see [Assigning People to a Business Unit](#) on page 26.

1. Click the **School Support/Booking** button on the **Welcome to EPM** page to display the business units to which you have access.



2. Select the required business unit to display the **School Support/Booking** page.

NOTE: If you select **All Business Units**, the information displayed is read-only.



NOTE: The selected business unit is displayed as a link on the top right-hand side of the page. To select a different business unit, click the link to display the **Business Unit** selector page.

Viewing School Support Bookings

NOTE: School support bookings are displayed for all support staff unless the user is mapped to a person or a base. For more information, see [Mapping a User to a Person](#) on page 14 and [Mapping a User to a Base](#) on page 15.

1. Select the required business unit for school support. For more information, see [Selecting a Business Unit for School Support](#) on page 56.
2. If required, enter a full or partial **Base Name** or **Support Staff** name to filter the list.
3. Select the required **From** and **To** dates.
4. If required, select the **Invoiced** check box.
5. Click the **Search** button to display a list of matching bookings.

School Support / Booking

Search Base Name, Support Staff

View Diary Time Summary

ab Invoiced From 14/09/2015 To 14/10/2016 Search Add

Base Name	Support Staff	Booking Status	Start Date	End Date	Support Type	Total Time	
Abacus College	Abriny, George	B	13/10/2015	13/10/2015		0.00	Actions
Abacus College	Dharanini,	B	13/10/2015	13/10/2015	LCURR	0.00	Actions
Abacus College	Abriny, George	B	13/10/2015	13/10/2015		0.00	Actions
101 Playgroup	Abriny, George	B	12/10/2015	12/10/2015	MDEPT	7.00	Actions
Abacus College	Abriny, George		12/10/2015	12/10/2015		0.00	Actions
						Days	0.93

5 Records Total

Back

Adding a School Support Booking

To record the details of a new school support booking:

1. Select the required business unit. For more information, see [Selecting a Business Unit for School Support](#) on page 56.
2. Click the **Add** button to display the **School Support/Booking:Add** page.

3. Click the **Base** browse button to display the **Base Search** dialog and select a base. For more information, see [Selecting a Base](#) on page 60.

4. Click the **Support Staff** browse button to display the **Support Staff Search** dialog and select the required person. For more information, see [Selecting Support Staff](#) on page 61.

Start Date and **End Date** are initially set to the current date.

5. If required, select a different dates for the appointment.

6. If required, select a **Support Type** from the drop-down list of support types assigned to this business unit. For more information, see [Assigning Business Units to a Support Type](#) on page 43.

7. If required, select a **Focus** from the drop-down list of focus codes assigned to this business unit. For more information, see [Assigning Business Units to a Focus Code](#) on page 45.

8. If required, click the **Activity** browse button to display the **Select an Activity** dialog and select an activity. For more information, see [Selecting an Activity](#) on page 62.

9. If required, enter **Travel Miles**.

10. If required, enter a **Follow Up** date.

11. If required, select a **Booking Status** from the drop-down list.

12. If required, select an **Originator** from the drop-down list (*Table ID: 0513*).

13. If required, click the **Contact** browse button to select a contact for this booking. For more information, see [Selecting a Person](#) on page 62.

14. If required, select an **SLA Code** to apply to this booking. For more information, see [Administering Service Level Agreements](#) on page 93.

15. Enter **Times (Hrs)** for the following:

- **General**
- **Preparation**
- **On-Site**
- **Follow Up**

■ **Travel.**

16. Click the browse button on the **Booking Details - Open/Close** panel to display the **Support Staff Search** dialog and select a person for the booking.
17. The invoice details are automatically completed when the invoice is produced. For more information, see [Producing an Invoice for School Support](#) on page 59.

18. If required, enter **Notes**.
19. Click the **Save** button.

NOTES: If the person has an overlapping school support booking, a warning message is displayed.

If the support staff member has an associated email address, a notification of this appointment is sent to them.

The appointment is only added to their Outlook calendar if their email address is mapped to a person in the v4 Client.

For more information, see [Mapping a User to a Person](#) on page 14.

Producing an Invoice for School Support

After a school support booking has been made and costs recorded, an invoice can be produced. The booking status must be **Booked**, **Completed** or **Provisional**.

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.

Base Name	Support Staff	Booking Status	Start Date	End Date	Support Type	Total Time	Actions
3 Dimensions	Acaster, Barry	B	20/11/2015	20/11/2015	LCURR	0.00	Actions
Abbey Maline School	Abbott, Christop	B	19/11/2015	19/11/2015		0.00	Actions
Days						0.0	

2. Click the **Actions** button adjacent to the school support booking that you want to invoice to display the **Actions** dialog.
3. Click the **Edit** button to display the **School Support/Booking: Edit** page.

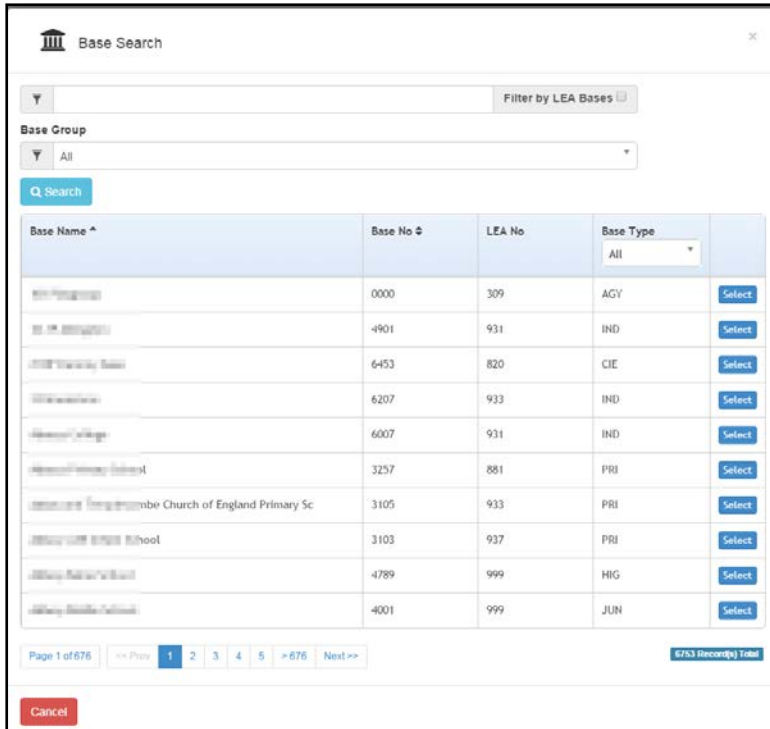
The screenshot displays the 'Booking Details - Open/Close' panel. At the top, there are several input fields: 'Support Type' (LCURR - Letter received Curriculum), 'Focus' (ATTD - Attendance), 'Activity' (School Improvement), 'Travel Miles' (0.0), 'Booking Status' (Booked (B)), and 'Contact'. Below these are sections for 'Times (Hrs) - Open/Close' and 'Booking Details - Open/Close'. The 'Times' section includes fields for 'General', 'Preparation', 'On-Site', 'Follow Up', and 'Travel', each with a value of 0.00, and 'Sub Total' and 'Total Time' fields. The 'Booking Details' section includes fields for 'By', 'Invoiced', 'Invoice No.', 'Invoice Date', and 'Invoice Prefix', along with an 'Invoice' button.

4. On the **Booking Details – Open/Close** panel, select an **Invoice Prefix** from the drop-down list (*Lookup Table ID: 0511*).
5. Click the **Invoice** button.

Selecting a Base

NOTE: Bases cannot be added or updated via the Provider portal. This can only be done in the v4 Client.

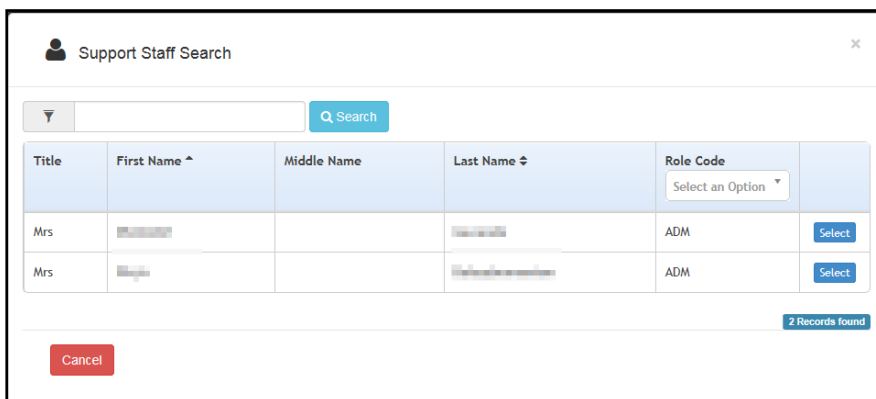
1. Click the base browse button to display the **Base Search** dialog.



2. If required, enter a full or partial **Base Name** or **Base No**.
3. If required, select the **Filter by LEA Bases** check box.
4. If required, select a **Base Group** from the drop-down list.
5. Click the **Search** button.
6. If required, select a **Base Type** from the drop-down list.
7. Click the **Select** button to select the required base.

Selecting Support Staff

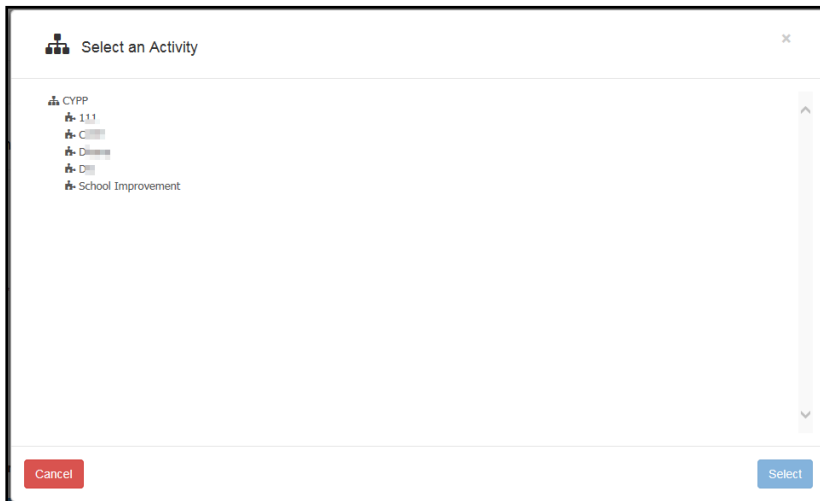
1. Click the browse button to display the **Support Staff Search** dialog listing only people who are assigned to EPM roles. For more information, see [Assigning a Person to an EPM Role](#) on page 15.



2. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button.
3. If required, select a **Role Code** from the drop-down list.
4. Click the **Select** button for the required person.

Selecting an Activity

1. Click the browse button to display the **Select an Activity** dialog.



2. Highlight the required activity and click the **Select** button.

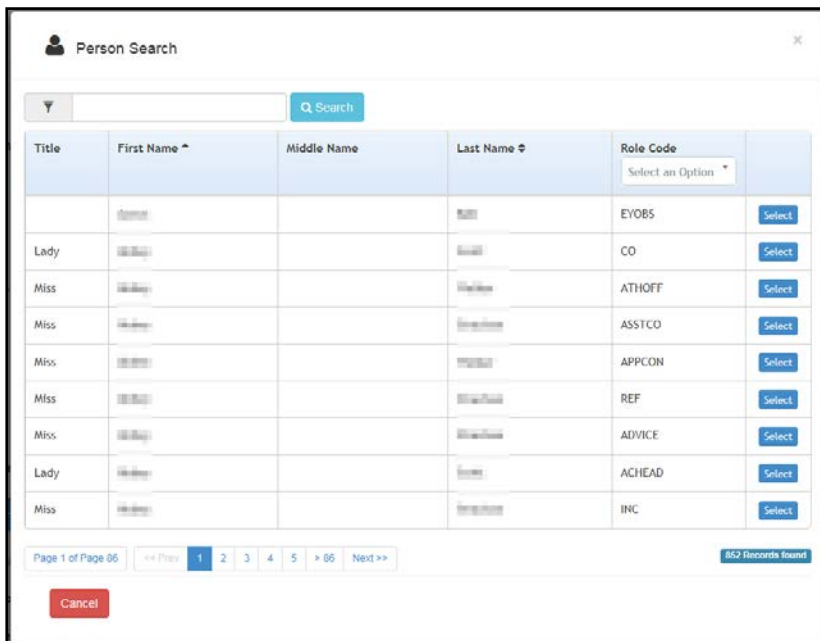
Selecting a Person

The **Person Search** dialog is used to search for any person who is assigned to a role.

NOTES: Records that are subject to ACL security are not displayed in the list.

People records cannot be added or updated in the Provider portal. This can only be done in the v4 Client.

1. Click the browse button to display the **Person Search** dialog listing all people who are assigned to a role.



2. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button.
3. If required, select a **Role Code** from the drop-down list.
4. Click the **Select** button for the required person.

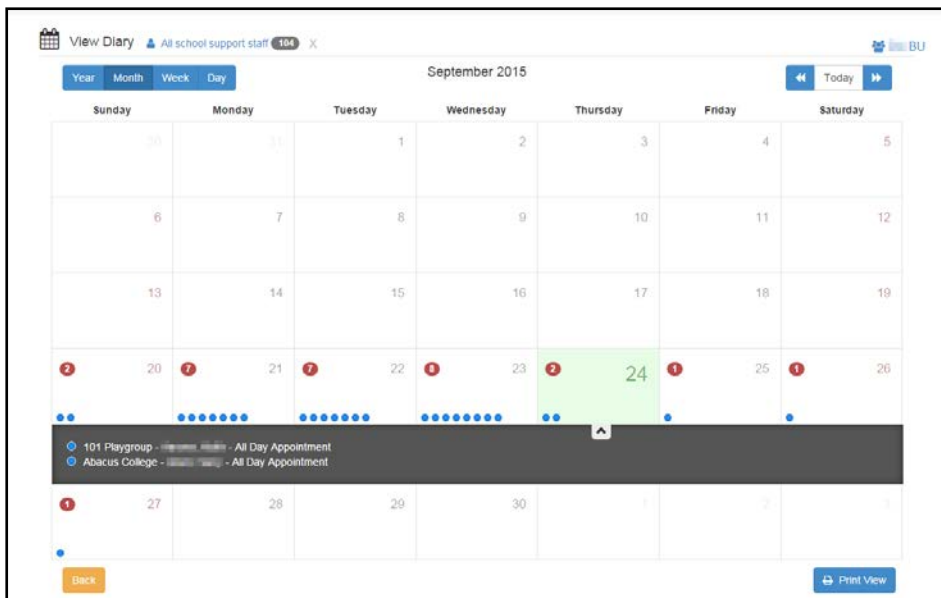
Managing the Diary for School Support

Viewing the Diary

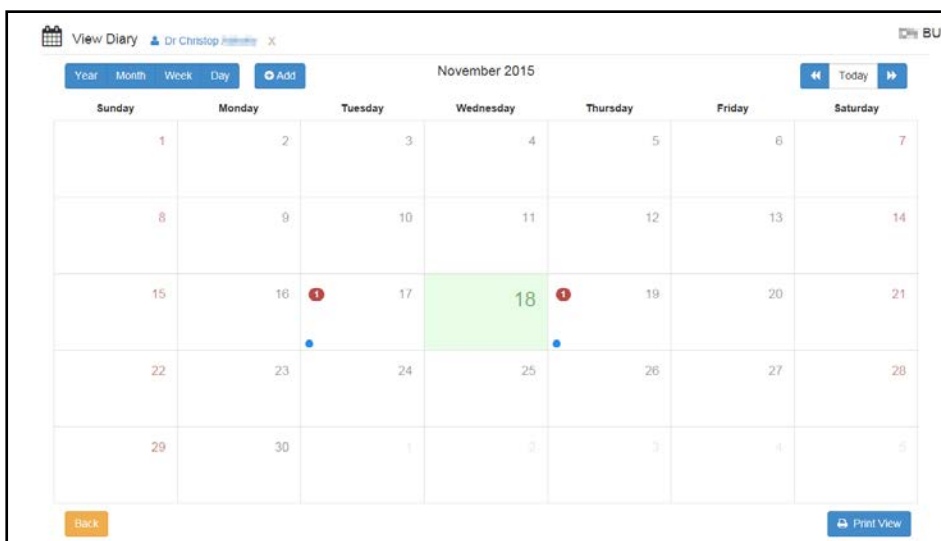
1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.
2. Click the **View Diary** button to display the **View Diary** page showing appointments for the current month for an individual, a base or all support staff.

NOTE: If the user is mapped to a person, the diary for that person is displayed. If they are mapped to a base, appointments relating to the base are displayed. Otherwise, appointments for all school support staff are displayed. For more information, see [Mapping a User to a Person](#) on page 14 and [Mapping a User to a Base](#) on page 15.

The number of appointments for each day and individual appointments for the current day are displayed. The following graphic shows appointments for **All school support staff** for the current day:

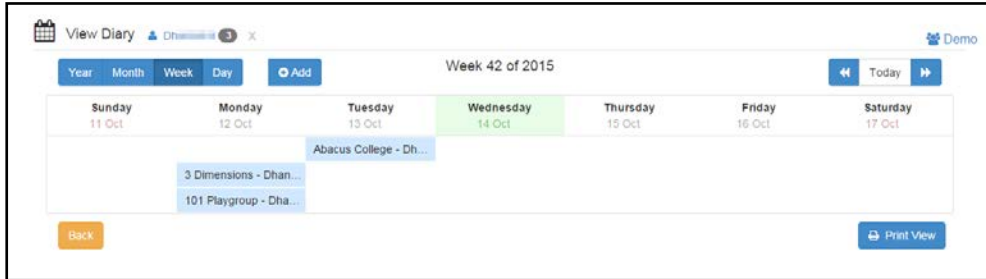


NOTE: If the user is mapped to a person, the name of the person is displayed as a link as shown in the following graphic.



Managing School Support

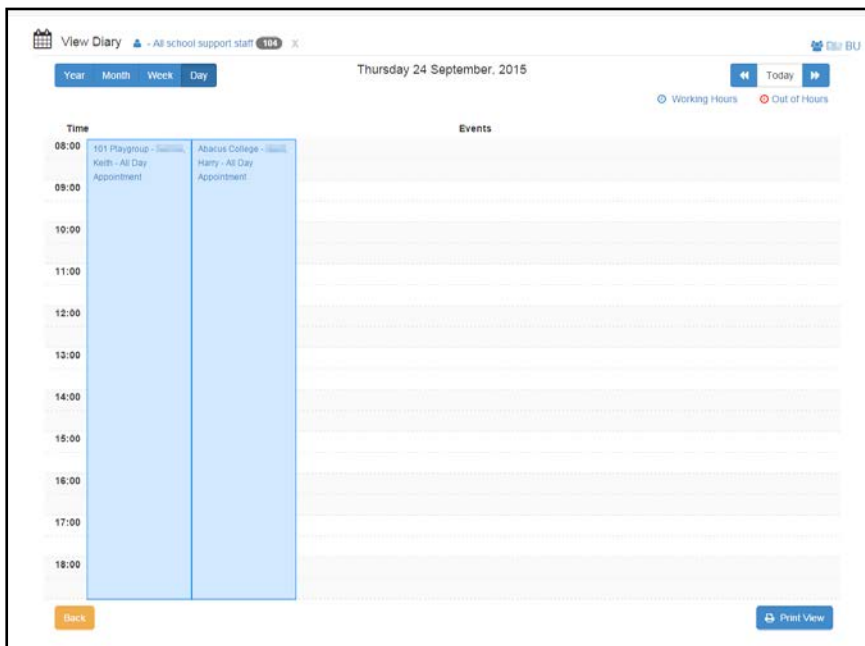
3. If required, select a different day on the displayed calendar to expand the list of appointments.
4. If required, click the **All school support staff** or name link to display the **Support Staff Search** dialog and select a support staff member. The diary for the selected person is displayed.
5. If required, click the **Year**, **Week** or **Day** button to display the diary in the appropriate view. The following graphic shows the current week's diary for an individual:



6. If required, click the forward or back arrows to display the next or previous year, month, week or day.

Viewing the Diary for a Selected Day

1. View the diary for the current month for the required support staff. For more information, see [Viewing the Diary](#) on page 63.
2. Click the **Day** button to display the diary for the selected day.



NOTE: The standard working hours are displayed. These standard working hours cannot be amended. If any appointments are outside of these standard times, the **Out of Hours** link is enabled and displayed in red.

3. If required, click the **Out of Hours** link to display appointments outside of the standard working hours.

Printing the Diary

1. View the diary for the required business unit, school support staff and time period. For more information, see [Viewing the Diary](#) on page 63.
2. Click the **Print View** button to view the report in a print view window.

View Diary (From: 24/09/2015 - To: 24/09/2015)

Name : All Support Staff
Business Unit : All Business Units

Base Name	Visitor	Start Date	End Date	Start Time	End Time
101 Playgroup	Aspinall, Keith	24/09/2015	24/09/2015	00.00	23.59
Abacus College	Smith, Harry	24/09/2015	24/09/2015	00.00	23.59

[Print](#)

- Click the **Print** button to display the **Print** dialog and print the report.

Editing School Support and Booking Details

- Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.
- Click the **Actions** button for the school support booking that you want to edit to display the **Actions** dialog.
- Click the **Edit** button to display the **School Support/Booking: Edit** page.

School Support / Booking: Edit Demo

Base:	Primary School	Support Staff:	Mr [Name]
Start Date:	15/10/2015	Start Time:	12:00 AM
End Date:	15/10/2015	End Time:	11:59 PM
Support Type:	MDEPT - Meeting with Department	Focus:	Please select...
Activity:		Travel Miles:	100.0
Follow Up:	dd/mm/yyyy	Booking Status:	Booked (B)
Originator:	Select an Option	Contact:	
SLA Code:			
Target:			

Times (Hrs) - Open/Close

General	10.00		
Preparation	2.00		
On-Site	3.00		
Follow Up	2.00	Sub Total	17.00
Travel	3.00	Total Time	20.00

- Make the required changes.
- Click the **Save** button.

NOTES: The target group lookup code is not included in the EPM portal. Any historic **Target** groups attached to the school support record will be shown in read-only format. Amendments can only be made via database scripts and these scripts are not provided as part of the portal delivery. The **Other Items** time which was recorded in v3 is not displayed in the EPM portal.

Adding an Action Point

To add an action point related to the school support visit:

- Select the required business unit to display the **School Support/Booking** page.
- For more information, see [Selecting a Business Unit for School Support](#) on page 56.

Managing School Support

- Click the **Actions** button adjacent to the school support booking to which you want to add an action point to display the **Actions** dialog.



- Click the **Action Points** button to display the **Action Points** page.
- Click the **Add** button to display the **Action Point** page.
- Enter a **Summary**.
- Click the **Responsibility** browse button to display the **Person Search** dialog and select the person responsible for this action. For more information, see [Selecting a Person](#) on page 62.
- Enter a **Due Date**.
- Select a **Status** from the drop-down (*Table ID: 0816*).
- If required, enter **Notes**.
- Click the **Save** button.

Viewing Action Points

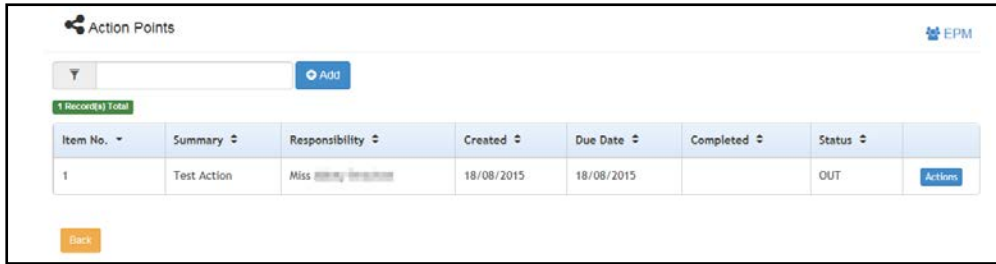
- Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.

Base Name	Support Staff	Booking Status	Start Date	End Date	Support Type	Total Time	Actions
Abacus College	Abram, George	B	13/10/2015	13/10/2015		0.00	Actions
Abacus College	Dhanraj, S	B	13/10/2015	13/10/2015	LCURR	0.00	Actions
Abacus College	Abram, George	B	13/10/2015	13/10/2015		0.00	Actions
101 Playgroup	Abram, George	B	12/10/2015	12/10/2015	MDEPT	7.00	Actions
Abacus College	Abram, George		12/10/2015	12/10/2015		0.00	Actions
						Days	0.93

- Click the **Actions** button adjacent to the school support booking to which you want to add an action point to display the **Actions** dialog.



- Click the **Action Points** button to display the **Action Points** page.

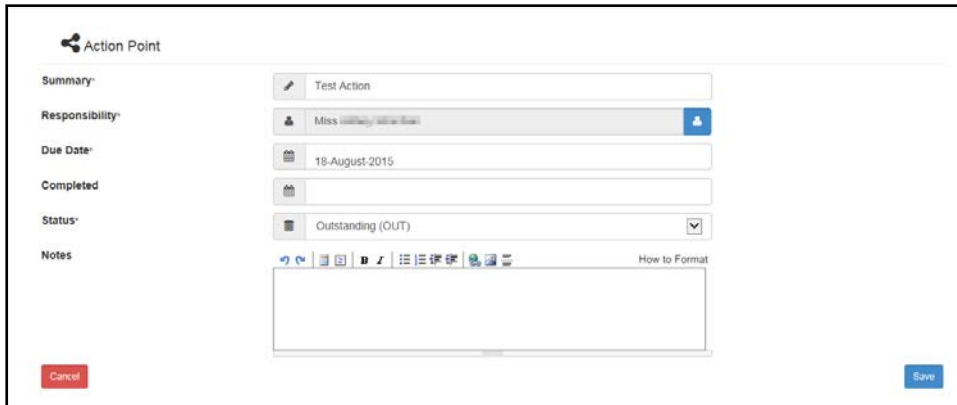


Editing an Action Point

1. Select the required action point. For more information, see [Viewing Action Points](#) on page 66.
2. Click the **Actions** button adjacent to the action point you want to edit to display the **Actions** dialog.



3. Click the **Edit** button to display the **Action Point** page.



4. Edit the information as required.
5. Click the **Save** button.

Deleting an Action Point

1. Select the required action point. For more information, see [Viewing Action Points](#) on page 66.
2. Click the **Actions** button adjacent to the action point you want to delete to display the **Actions** dialog.

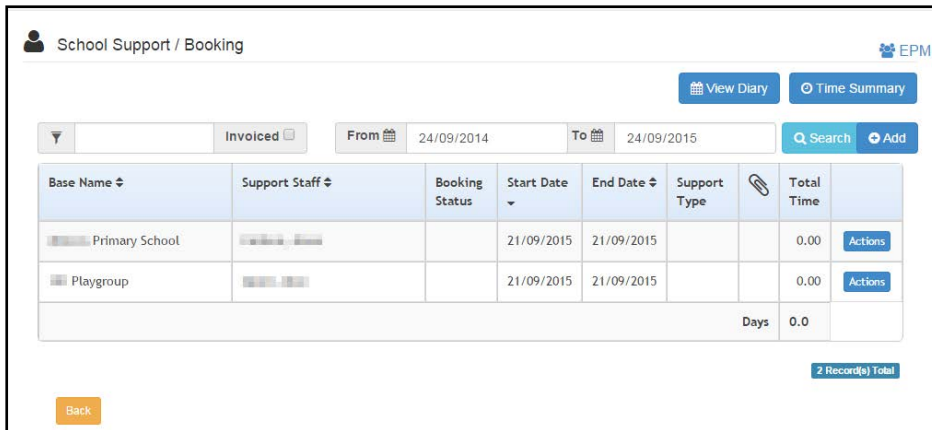


3. Click the **Delete** button to display a confirmation message:
Are you sure you want to delete this Action Point?
4. Click the **Yes** button.

Adding Costs for School Support

To record costs related to the school support visit:

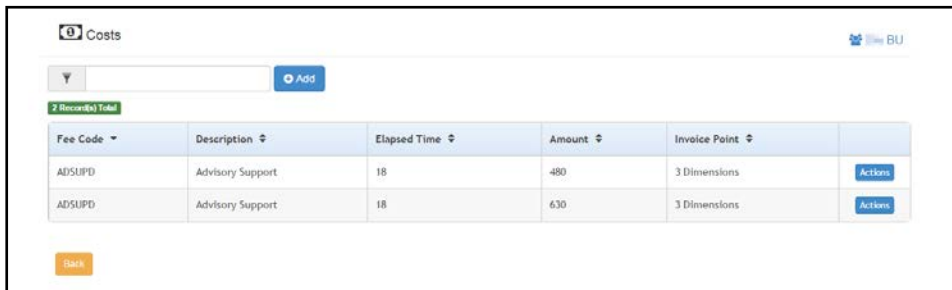
1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.



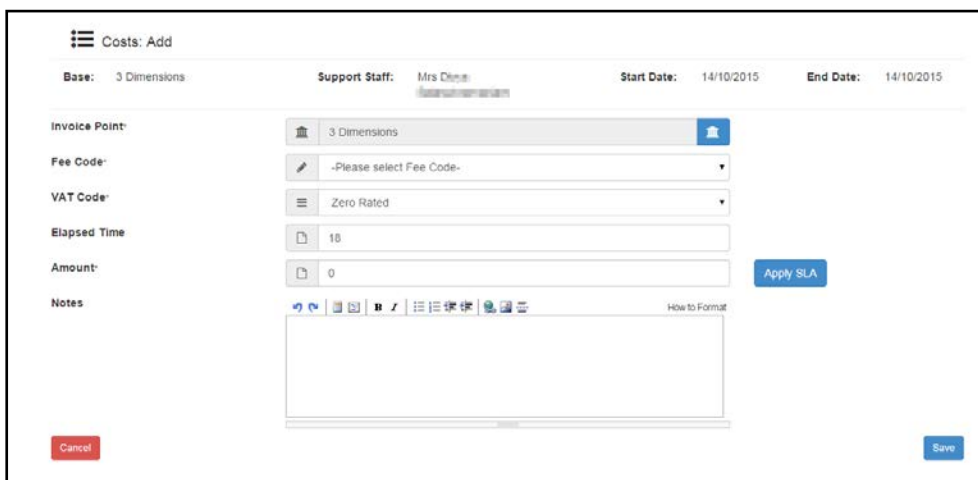
2. Click the **Actions** button adjacent to the booking to which you want to add costs to display the **Actions** dialog.



3. Click the **Costs** button to display the **Costs** page.



4. Click the **Add** button to display the **Costs: Add** page.



5. Select a **Fee Code** from the drop-down list.

6. If required, select a **VAT Code** from the drop-down list.
7. If required, enter **Elapsed Time**.

Amount is automatically calculated based on the fee code, VAT code and elapsed time. For more information, see [Calculating the Cost of Support](#) on page 33.

NOTE: The **Apply SLA** button is enabled if an SLA is associated with this base. For more information, see [Assigning a Service Level Agreement to a Base](#) on page 93.

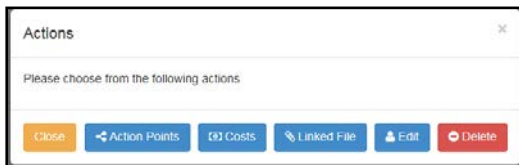
8. If required, click the **Apply SLA** button to apply a Service Level Agreement associated with the invoice point.

IMPORTANT NOTE: An SLA may already have applied to this cost. If this is the case, the amount will already have been updated. Applying the SLA again will result in the wrong amount being calculated.

9. If required, enter **Notes**.
10. Click the **Save** button.

Viewing Costs for School Support

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.
2. Click the **Actions** button adjacent to the booking for which you want to view costs to display the **Actions** dialog.



3. Click the **Costs** button to display the **Costs** page.

Fee Code	Description	Elapsed Time	Amount	Invoice Point	Actions
ADSUPD	Advisory Support	18	480	3 Dimensions	Actions
ADSUPD	Advisory Support	18	630	3 Dimensions	Actions

4. If required, filter the list of costs by entering a full or partial **Fee Code** or **Description**.

Editing Costs for School Support

Costs for school support are calculated based on the **fee code**, **VAT code** and **elapsed time**. If the invoice point is a base that has a Service Level Agreement (SLA) associated with it, the SLA can be applied and a new amount calculated.

1. View the costs for school support for a business unit. For more information, see [Viewing Costs for School Support](#) on page 69.

Managing School Support

Fee Code	Description	Elapsed Time	Amount	Invoice Point	Actions
ADSUPD	Advisory Support	18	480	3 Dimensions	Actions
ADSUPD	Advisory Support	18	630	3 Dimensions	Actions

- Click the **Actions** button adjacent to the booking for which you want to edit costs to display the **Actions** dialog.
- Click the **Edit** button to display the **Costs: Edit** page.

Costs: Edit

Base: 3 Dimensions Support Staff: Mrs Divya Balasubramaniam Start Date: 14/10/2015 End Date: 14/10/2015

Invoice Point: 3 Dimensions

Fee Code: ADSUPD - Advisory Support - Daily

VAT Code: Zero Rated

Elapsed Time: 18

Amount: 480 **Apply SLA**

Notes: [Rich text editor]

Cash Date: [Field]

Cheque Date: [Field]

Cheque No.: [Field]

Cancel **Save**

NOTE: The **Apply SLA** button is enabled if an SLA has been defined for EPM and is associated with this base. For more information, see [Assigning a Service Level Agreement to a Base](#) on page 93.

- If required, click the **Apply SLA** button to apply the associated SLA and calculate a new amount. For example, in the following graphic the **Amount** has been reduced by the value of the SLA associated with the base:

Costs: Edit

Base: 3 Dimensions Support Staff: Mrs Divya Balasubramaniam Start Date: 14/10/2015 End Date: 14/10/2015

Invoice Point: 3 Dimensions

Fee Code: ADSUPD - Advisory Support - Daily

VAT Code: Zero Rated

Elapsed Time: 18

Amount: 455 **Apply SLA**

Notes: [Rich text editor]

Cash Date: [Field]

Cheque Date: [Field]

Cheque No.: [Field]

Cancel **Save**

NOTES: An SLA may be defined as a percentage or an absolute value. For more information, see [Defining a New SLA](#) on page 18.

An SLA may already have been applied. If this is the case, the amount is already updated and applying the SLA again will result in the wrong amount being calculated.

Recording Answers to Additional Questions for School Support Costs

1. View the costs for school support for a business unit. For more information, see [Viewing Costs for School Support](#) on page 69.

Fee Code	Description	Elapsed Time	Amount	Invoice Point	Actions
ADSIUPD	Advisory Support	18	480	3 Dimensions	Actions
ADSIUPD	Advisory Support	18	630	3 Dimensions	Actions

2. Click the **Actions** button adjacent to the booking for which you want to record answers to display the **Actions** dialog.
3. Click the **Additional Questions** button to display additional questions that have been set up for the **School Support Cost** area. For more information, see [Setting Up Additional Questions](#) on page 51.
4. Enter the **required** answers.
5. Click the **Save** button.

Adding a Linked File

One or more files can be linked to the school support record.

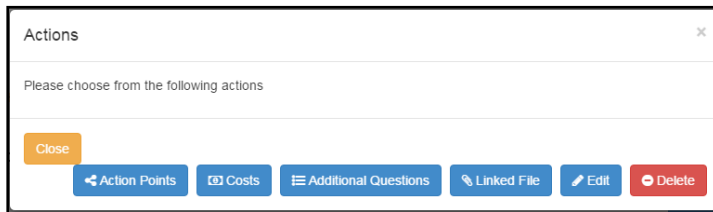
NOTE: The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.

Base Name	Support Staff	Booking Status	Start Date	End Date	Support Type	Total Time	Actions
...	...	B	20/11/2015	20/11/2015		0.00	Actions
...	...		20/11/2015	20/11/2015		7.50	Actions
...	...	B	20/11/2015	20/11/2015		0.00	Actions
...	...	B	31/10/2015	31/10/2015		6.00	Actions
...	...	B	14/10/2015	14/10/2015		21.00	Actions
...	...		07/10/2015	07/10/2015		1.00	Actions
...	...		07/10/2015	07/10/2015		0.00	Actions
						Days	4.73

Managing School Support

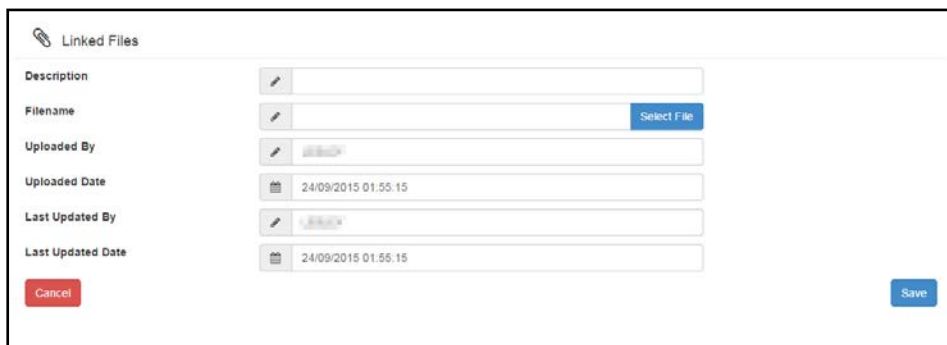
- Click the **Actions** button adjacent to the booking for which you want to add a linked file to display the **Actions** dialog.



- Click the **Linked File** button to display the **Linked Files** page.



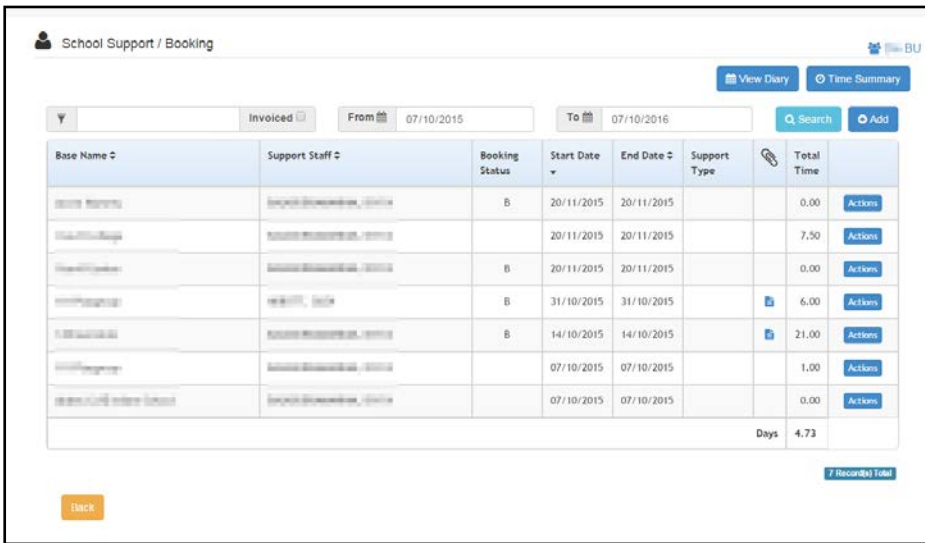
- Click the **Add** button to display the **Linked Files** selection page.



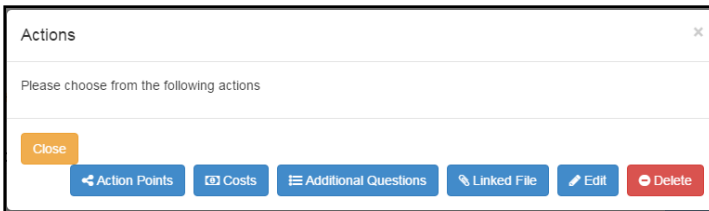
- Enter a **Description**.
- Click the **Select File** button and select the required file.
- Click the **Save** button.

Removing a Linked File

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.



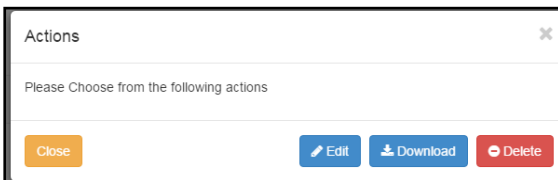
2. Click the **Actions** button adjacent to the booking for which you want to remove a linked file to display the **Actions** dialog.



3. Click the **Linked File** button to display the **Linked Files** page.



4. Click the **Actions** button adjacent to the linked file that you want to remove to display the **Actions** dialog.



5. Click the **Delete** button. A confirmation message is displayed.
6. Click the **Yes** button.

Recording Answers to Additional Questions for School Support

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.

Base Name	Support Staff	Booking Status	Start Date	End Date	Support Type	Total Time	Actions
College	Joan	B	23/09/2015	23/09/2015	AI	0.00	Actions
Abingdon	Nicholas	B	23/09/2015	23/09/2015	MITEAC	0.00	Actions
Primary School	Harry		21/09/2015	21/09/2015	MGTEAC	24.00	Actions
College	Harry	X	20/09/2015	23/09/2015		0.00	Actions
Abbey School	Harry	X	16/09/2015	20/09/2015		0.00	Actions
						Days	3.20

2. Click the **Actions** button adjacent to the booking for which you want to record answers to display the **Actions** dialog.

Actions

Please choose from the following actions

Close

Action Points Costs Additional Questions Linked File Edit Delete

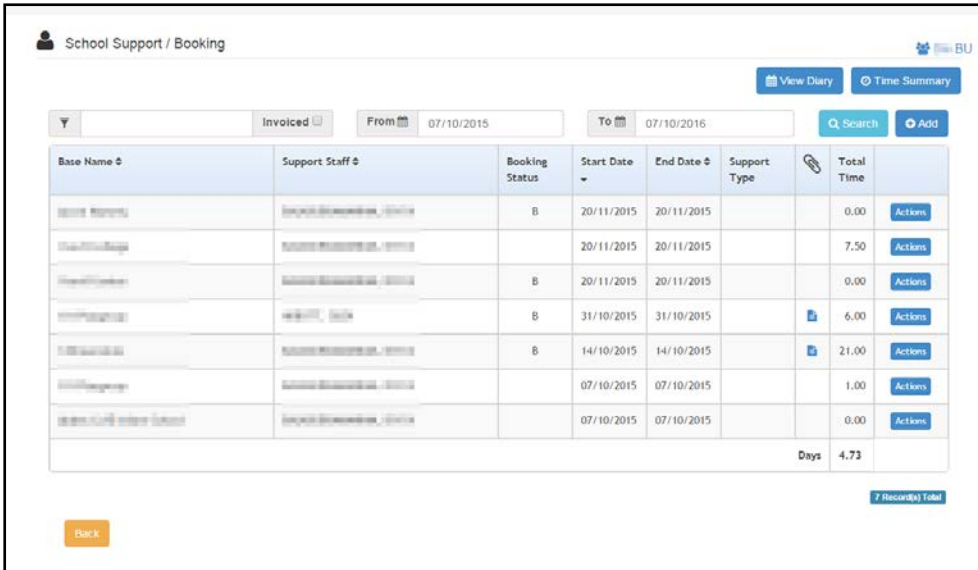
3. Click the **Additional Questions** button to display additional questions that have been set up for the School Support area. For more information, see [Setting Up Additional Questions](#) on page 51.
4. Enter the required answers.
5. Click the **Save** button.

Viewing the Time Summary

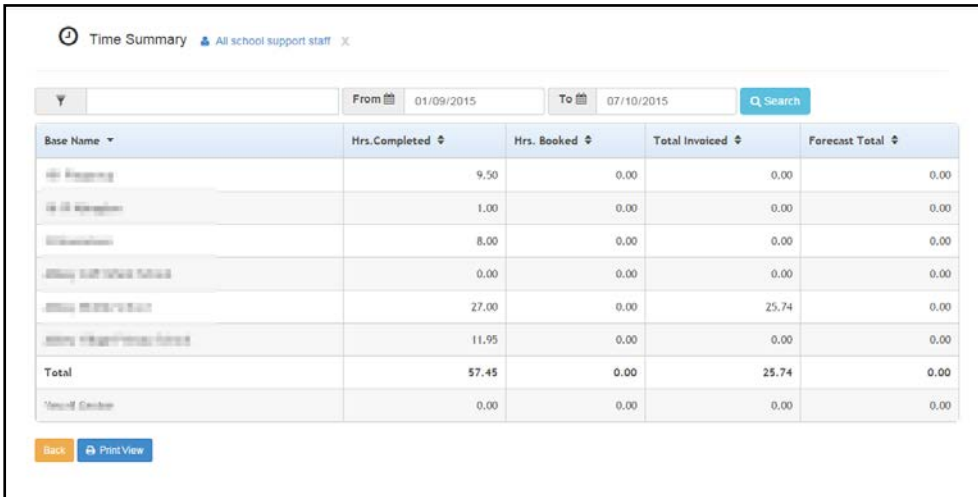
A summary of the time spent at each base can be viewed and printed. The list can be filtered using base name.

NOTE: The time spent in hours is converted into days before being displayed.

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page 56.



- Click the **Time Summary** button to display the **Time Summary** page. The date range is initially set to display the previous month, but can be changed.

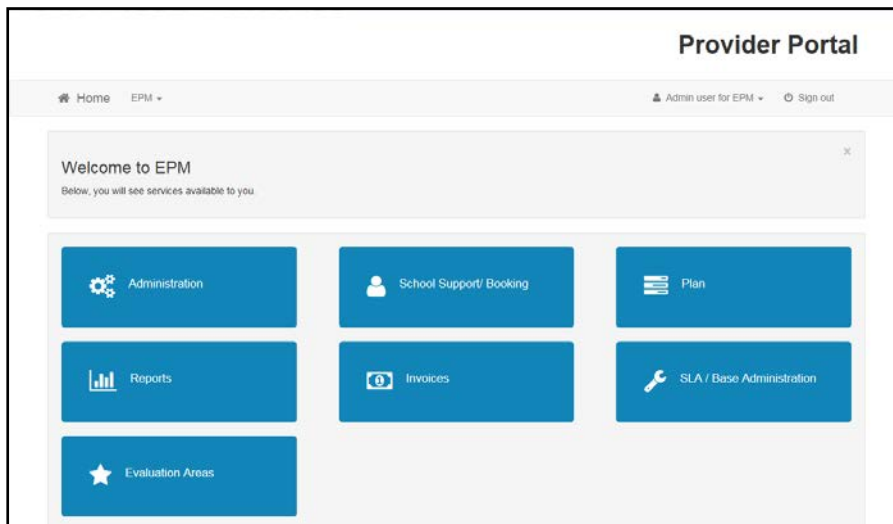


- If required, click the **All school support staff** link to display the **Support Staff Search** dialog and select a staff member.
- If required, click the **Print View** button to display the **Time Summary** in print view.

07 / Managing a Plan

Introduction

School support visits are booked and associated actions, costs and linked files are recorded in the Plan area. This is accessed via the **Plan** tile on the **Welcome to EPM** page.



Selecting a Plan

1. Click the **Plan** button on the **Welcome to EPM** page to display the **Business Units selector** page.
2. Select the required business unit to display the **Plan** page. The plan is displayed as a tree structure, as shown in the following graphic:



NOTE: If you select **All Business Units**, the data displayed is read-only.

Adding an Activity to a Plan

An activity can be a project, target or task.

To add an activity to a plan:

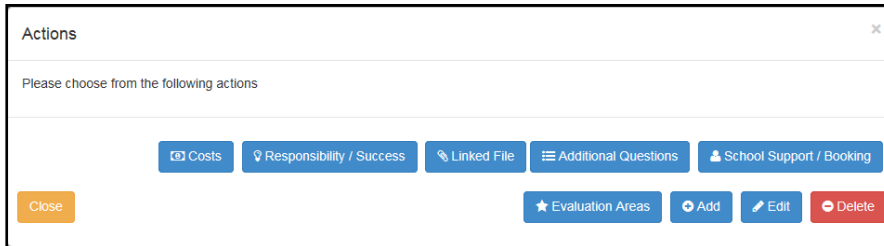
1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.

Managing a Plan

2. Select the required area of the plan.



3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **Add** button to display the **Add** page.

The 'Add' page is shown, featuring a form for creating a new activity. The form includes fields for Type (a dropdown menu), Name, Manager (with a browse button), Status, National Priority, Short Code, Days, Date Proposed, Estimated Start, Estimated End, Must End By, Actual Start, and Actual End. A Notes field with a rich text editor is at the bottom.

5. Select an Activity **Type** from the drop-down list.
6. Enter a **Name**.
7. If required, click the browse button to display the **Support Staff Search** and select a **Manager**.

The 'Support Staff Search' dialog box is shown, displaying a search results table. The table has columns for Title, First Name, Middle Name, Last Name, and Role Code. A 'Select' button is visible next to the first row.

Title	First Name	Middle Name	Last Name	Role Code
Dr	[Redacted]		[Redacted]	ADM0FF

8. If required, select a **Status** from the drop-down list.
9. If the activity **Type** is **Project**, you can select a **National Priority** from the drop-down list (*Lookup Table ID: 0501*).

10. If required, enter the following information about the activity:

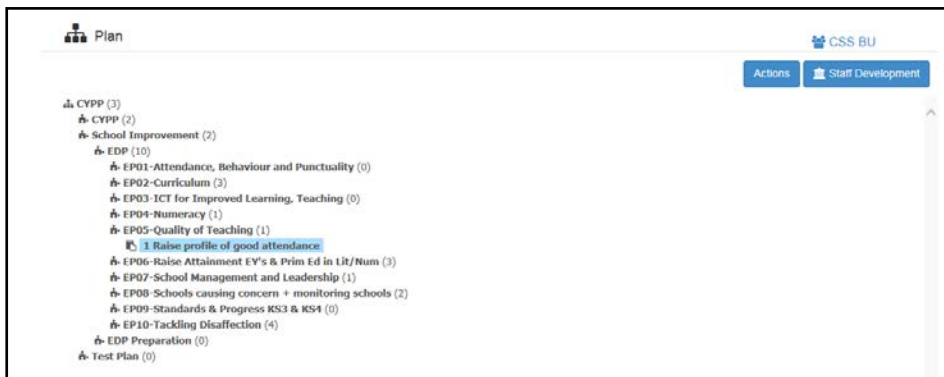
- A **Short Code**.
- The number of **Days**.
- The **Date Proposed**.
- **Estimated Start** and **End** dates.
- **Must End By** date.
- **Actual Start** date.
- **Actual End** date.
- **Notes**.

11. Click the **Save** button.

Adding a Cost to an Activity

To attach a cost to an activity:

1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.
2. Select the required area of the plan.

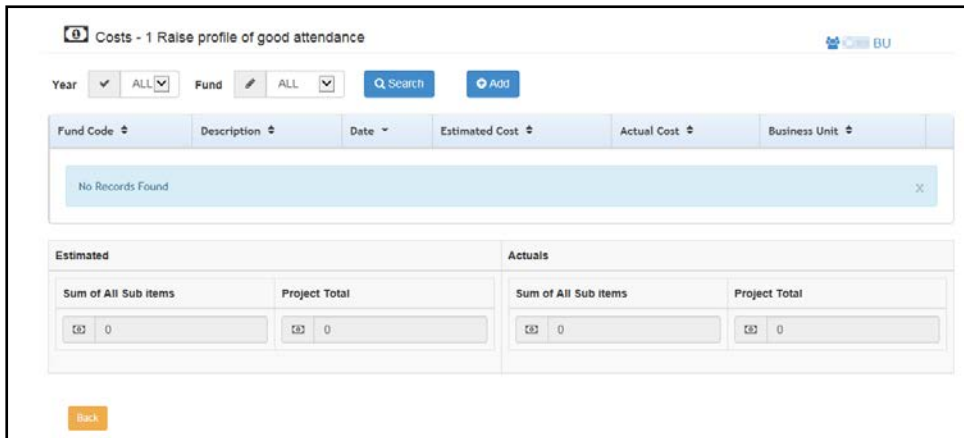


3. Click the **Actions** button to display the **Actions** dialog.

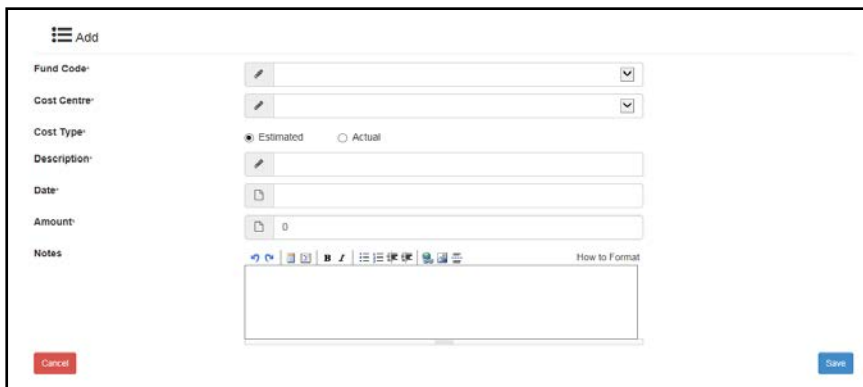


4. Click the **Costs** button to display the **Costs** page.

Managing a Plan



5. Click the **Add** button to display the **Add** page.



6. Select a **Fund Code** from the drop-down list.
7. Select a **Cost Centre** from the drop-down list (*Lookup Table ID: 0503*).
8. Select a **Cost Type** radio button.
9. Enter a **Description**.
10. Enter a **Date**.
11. Enter an **Amount**.
12. If required, enter **Notes**.
13. Click the **Save** button.

Adding a Linked File to the Plan

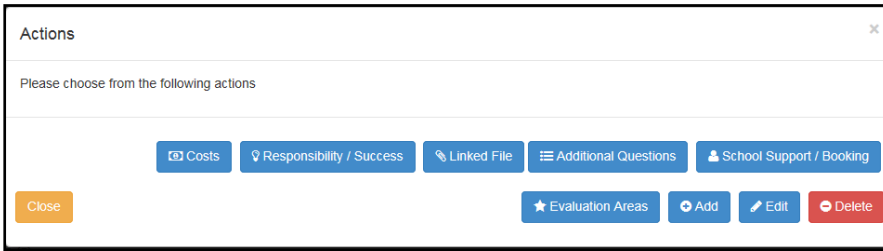
One or more files can be linked to the plan.

NOTE: The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.

1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.
2. Select the required area of the plan.



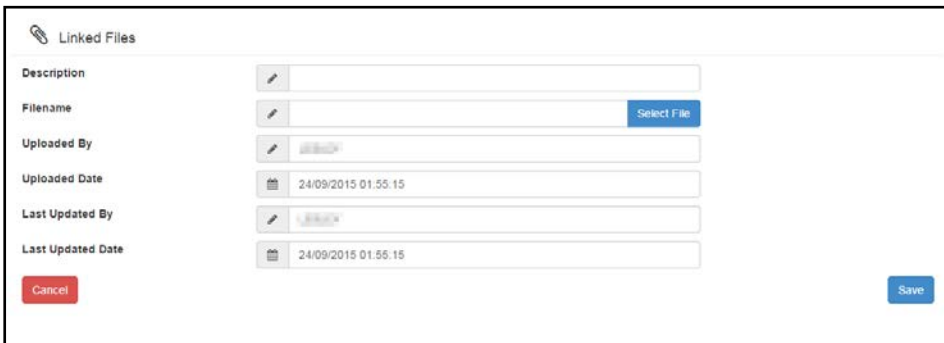
- Click the **Actions** button to display the **Actions** dialog.



- Click the **Linked File** button to display the **Linked Files** page.



- Click the **Add** button to display the **Linked Files** selection page.



- Enter a **Description**.
- Click the **Select File** button and select the required file.
- Click the **Save** button.

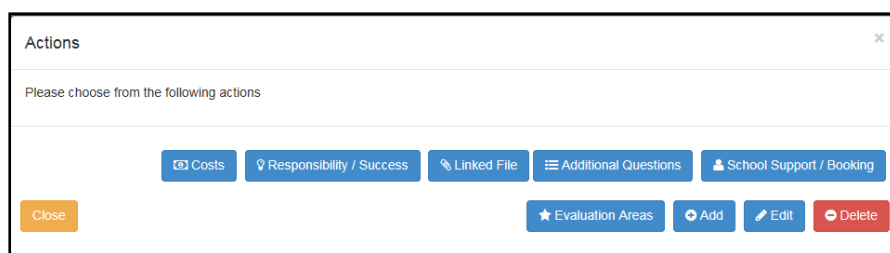
Recording Answers to Additional Questions for a Plan

- Select a plan. For more information, see [Selecting a Plan](#) on page 77.
- Select the required area of the plan.



- Click the **Actions** button to display the **Actions** dialog.

Managing a Plan



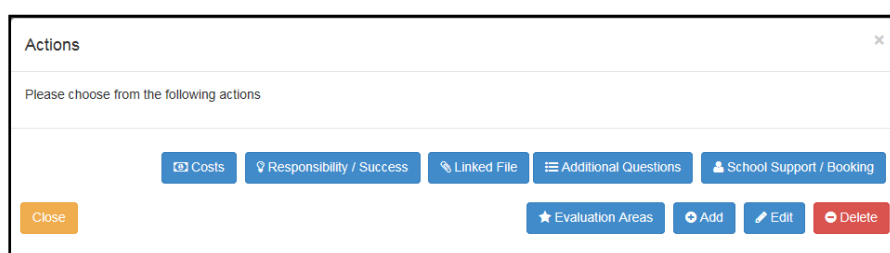
4. Click the **Additional Questions** button to display additional questions that have been set up for the Plan area. For more information, see [Setting Up Additional Questions](#) on page 51.
5. Enter the required answers.
6. Click the **Save** button.

Recording School Support for a Plan

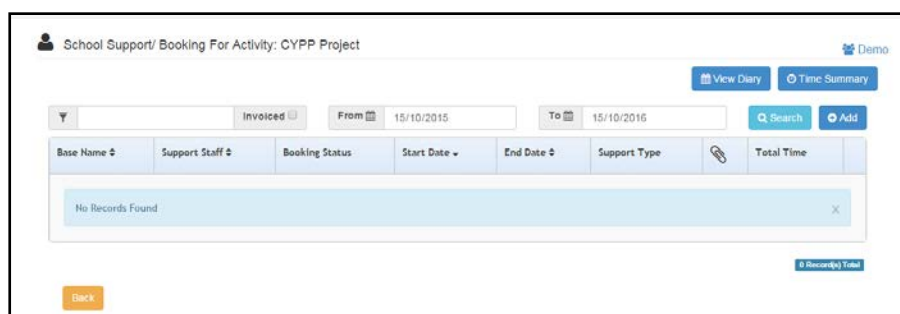
1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.
2. Select the required area of the plan.



3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **School Support / Booking** button to display the **School Support/Booking For Activity** page.



5. Click the **Add** button to display the **School Support/Booking Add** page and record a new booking. For more information, see [Adding a School Support Booking](#) on page 57.

Recording Responsibility and Success

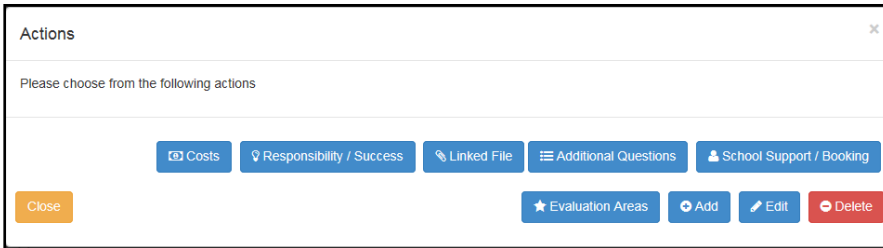
Details of outcomes of projects and activities and those responsible can be recorded against the plan.

1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.

2. Select the required area of the plan.



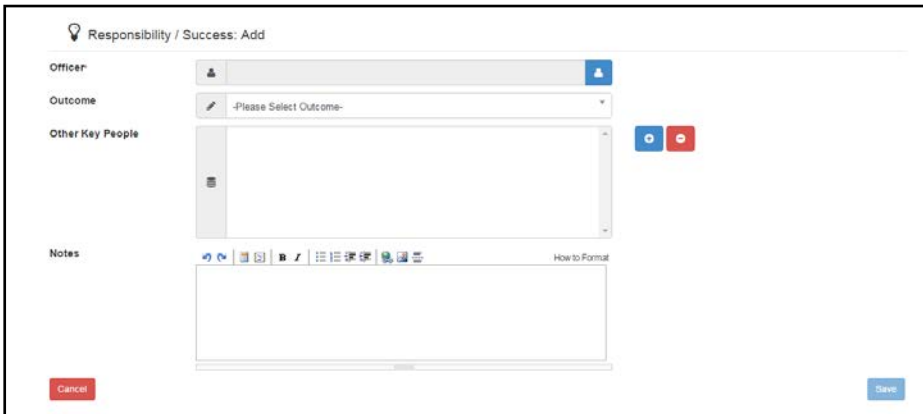
3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **Responsibility/Success** button to display the **Responsibility/Success** page.



5. Click the **Add** button to display the **Responsibility/Success: Add** page.



6. Click the browse button to display the **Support Staff Search** dialog and select an **Officer**.
7. If required, select an **Outcome** from the drop-down list (*Lookup Table ID: 0504*).
8. If required, click the add button to display the **Support Staff Search** dialog and select **Other Key People**.
9. If required, enter **Notes**.
10. Click the **Save** button.

Displaying Staff Development Linked to a Plan

To display staff training that has been provided in relation to a plan:

NOTE: The training courses displayed are those recorded via v4 Training Manager. Courses recorded via v3 Training Manager are not displayed.

1. Select a plan. For more information, see [Selecting a Plan](#) on page 77.
2. Select the required activity.



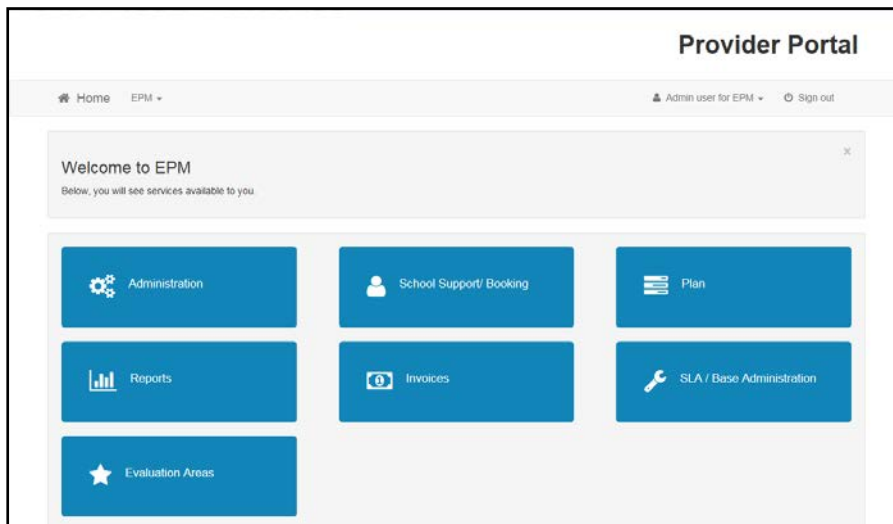
3. Click the **Staff Development** button to display the **Staff Development** page.



08 / Managing Reports

Introduction

The Report Manager enables you to run and manage EPM reports. It is accessed via the **Reports** tile on the **Welcome to EPM** page.



Standard reports are provided and any existing or newly created Crystal reports can be run from the EPM portal provided one of the following criteria applies:

- The report does not use any parameters or
- The report uses parameters that match those on the EPM portal reporting screens.

Reports that do not meet these criteria can still be run from the v4 Client.

Standard Reports

The following standard reports are provided.

NOTE: These are sample reports provided for the initial release of EPM Provider portal and, as such, are not supported for future releases. Any required amendments can be made by the local authority or can be requested as chargeable work.

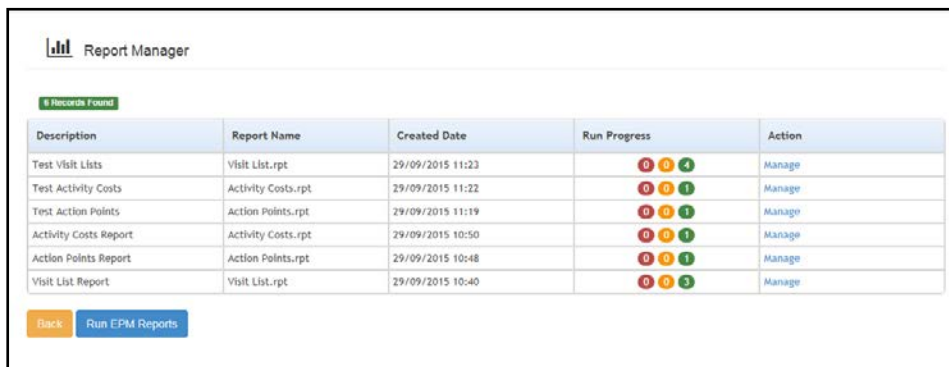
Report	Description
Action Points	Lists all action points that match the parameters. The date range is applied to the due date and all other parameters relate to the visit to which the action point is associated.
Activity Costs	Lists all costs recorded against activities. The Business Unit ID and Activity ID are the only parameters used in this report.
External Finance Reference Numbers	A simple list of all bases with a reference number recorded (no parameters).
Invoices	A basic template to be used with the invoice routine. This report will produce one page per invoice number.

Report	Description
Invoices Issued	A list of all issued invoices. The date range is applied to the invoice date and all other parameters relate to the visit to which the invoice relates.
Visit Costs	A list of all visits with costs recorded against them, plus invoice details where relevant. The date range is applied to the visit date and all other parameters relate to the visit to which the invoice relates. An invoiced and un-invoiced total are included in the report footer.
Visit List	A list of all visits. The date range is applied to the visit date and all other parameters relate to the visit. Any questions and answers recorded against the visit are provided as a sub-report.

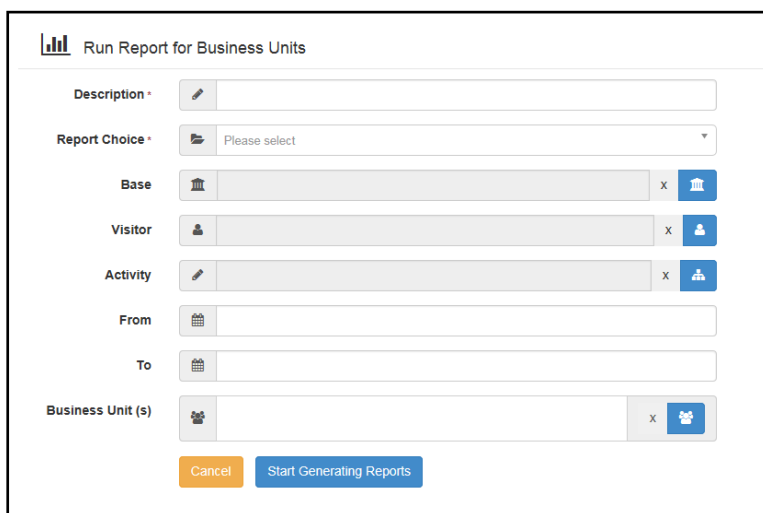
Running a Report

NOTE: If no report parameters are selected, the report will be generated for all possible parameters.

1. Click the **Reports** tile on the **Welcome to EPM** page to display the **Report Manager** page.



2. Click the **Run EPM Reports** button to display the **Run Report for Business Units** page.



3. Enter a **Description**.
4. Select a **Report Choice** from the drop-down list.
5. Enter one or more parameters for the report as follows:
 - a. Click the **Base** browse button and select a base.
 - b. Click the **Visitor** browse button to display the **Person Search** and select a visitor.

- c. Click the **Activity** browse button and select an activity.
 - d. Select a **From** and **To** date.
 - e. Select the required business unit as follows:
 - i. Click the **Business Unit(s)** browse button to display a list of shared business units and those to which you have access.
 - ii. Select the required business unit.
6. Click the **Start Generating Reports** button.

Managing EPM Reports

1. Click the **Reports** tile on the **Welcome to EPM** page to display the **Report Manager** page.

Description	Report Name	Created Date	Run Progress	Action
PRG	Invoice.rpt	14/10/2015 09:49	0 0 1	Manage
PRG	Invoice.rpt	14/10/2015 09:47	0 0 1	Manage
Nics Reports	Visit List.rpt	12/10/2015 17:04	0 0 1	Manage
INV	Invoice.rpt	12/10/2015 16:58	0 1 0	Manage
INV	Invoice.rpt	12/10/2015 16:01	0 0 1	Manage
Nics test Report	Visit List.rpt	12/10/2015 14:53	0 0 0	Manage

Buttons: Cancel, Run EPM Reports

2. Click the **Manage** link for the required report to display the **Manage Report** page.

Description	Report Name	Created Date	Run Progress
PRG	Invoice.rpt	14/10/2015 09:49	0 0 1

Search: Search

Business Unit	Person Name	Base Name	Activity Name	From	To	Last Updated	Invoice	Status	Action
						14/10/2015 09:50:03	✓	Generated	Preview

Buttons: Cancel, Refresh, Re-Generate Reports

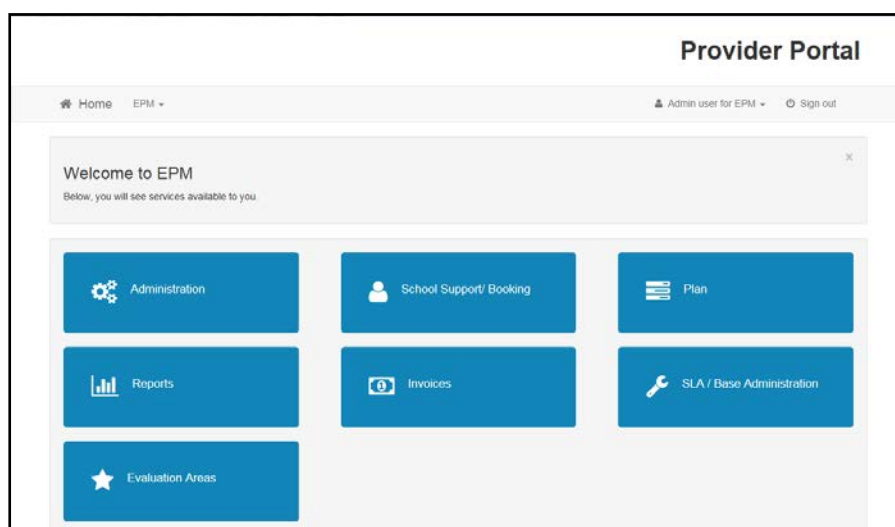
3. If required, enter a filter of **Business Unit**, **Person Name**, **Base Name** or **Activity Name** and click the **Search** button.
4. If required, click the **Re-Generate Reports** button to re-generate all reports for the current filter. A confirmation message is displayed.
5. Click the **Yes** button to confirm.
6. If required, click the **Refresh** button to refresh the list.
7. If required, click the **Preview** button to preview a generated report.

09 / Managing Invoices

Introduction

Invoices can be produced for any booking with a booking status of **Booked**, **Completed** or **Provisional**.

Viewing Bookings to be Invoiced



1. Click the **Invoices** tile on the **Welcome to EPM** page to display the **Invoice Bookings** page.

2. Enter the **End date before**.
3. Enter the **Invoice Date**.
4. Select the **Invoice no. Prefix**.
5. If required, select an invoice report template from the **Invoice Design** drop-down. For more information, see [Managing Reports](#) on page 85.
6. Click the **Choose** button to display the **Bookings to be Invoiced** page.

Managing Invoices

Bookings to be Invoiced

Records Total: 2

End Date	School No.	Base Name	Base Type	Support Staff	Activity Name	Business Unit Short Name	Amount
23/10/2001	4002	Middle School	MID - Middle School	Address transition issues	Address transition issues	EPM	280
23/05/2002	2072	Lower School	LOW - Lower School	EP01-Attendance, Behaviour and Punctuality	EP01-Attendance, Behaviour and Punctuality	EPM	272.73

Available Bookings Amount: 552.73 Selected Bookings Amount: 0.00

Buttons: Cancel, Process

- If required, click a booking to display the details.

Bookings to be Invoiced

Records Total: 2

End Date	School No.	Base Name	Base Type	Support Staff	Activity Name	Business Unit Short Name	Amount
23/10/2001	4002	Middle School	MID - Middle School	Address transition issues	Address transition issues	EPM	280
23/05/2002	2072	Lower School	LOW - Lower School	EP01-Attendance, Behaviour and Punctuality	EP01-Attendance, Behaviour and Punctuality	EPM	272.73

School No.	Base Name	Base Type	Amount
4002	Middle School	MID - Middle School	280

Available Bookings Amount: 552.73 Selected Bookings Amount: 0.00

Buttons: Cancel, Process

Producing Invoices

Invoices can be produced for one or more bookings with a status of **Booked**, **Completed** or **Provisional**.

NOTE: After the invoice has been produced, the booking cannot be updated or any further costs added.

- View the bookings to be invoiced. For more information, see [Viewing Bookings to be Invoiced](#) on page 89.

Bookings to be Invoiced

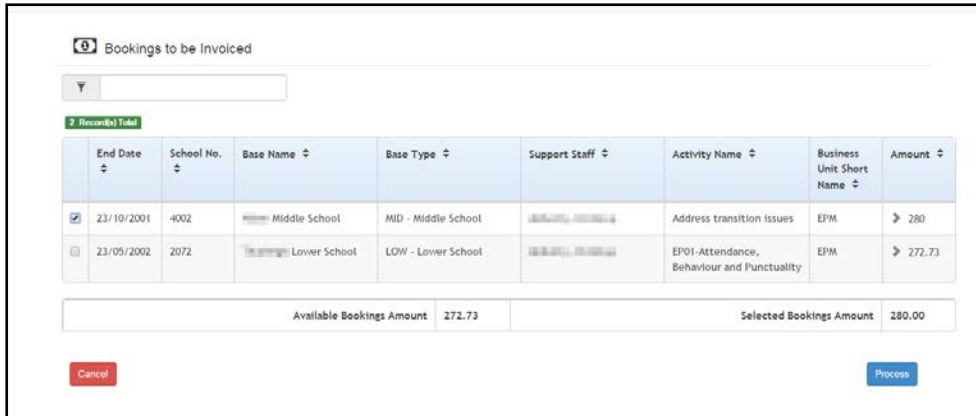
Records Total: 2

End Date	School No.	Base Name	Base Type	Support Staff	Activity Name	Business Unit Short Name	Amount
23/10/2001	4002	Middle School	MID - Middle School	Address transition issues	Address transition issues	EPM	280
23/05/2002	2072	Lower School	LOW - Lower School	EP01-Attendance, Behaviour and Punctuality	EP01-Attendance, Behaviour and Punctuality	EPM	272.73

Available Bookings Amount: 552.73 Selected Bookings Amount: 0.00

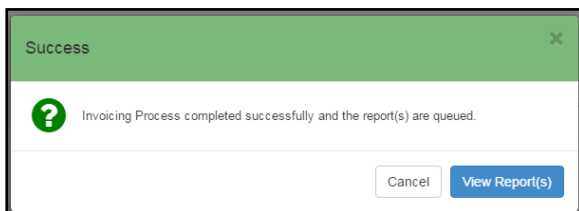
Buttons: Cancel, Process

- Select one or more bookings.

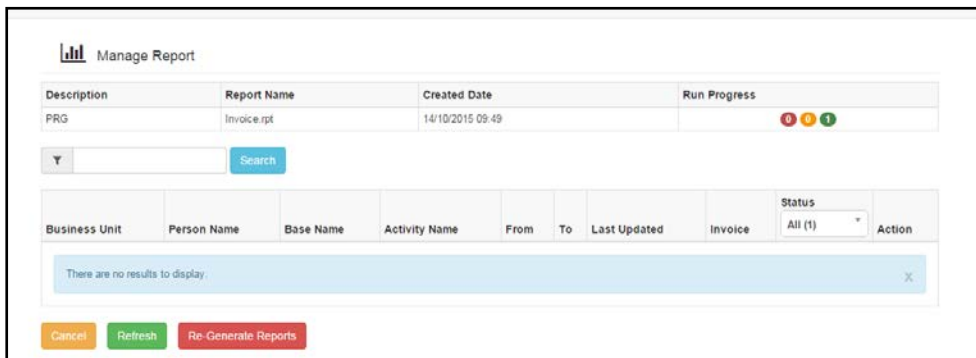


3. Click the **Process** button.

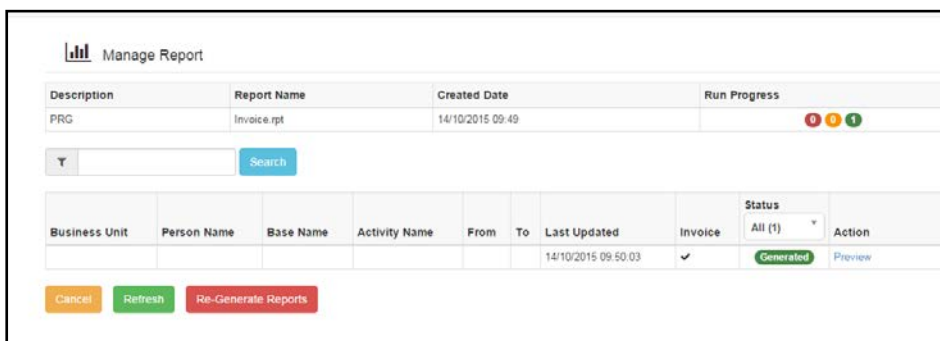
The following success message is displayed:



4. Click the **View Report(s)** button to display the **Manage Report** page.



5. Click the **Refresh** button to refresh the list of reports.



6. If required, click the **Preview** link to display the invoice.

Managing Invoices

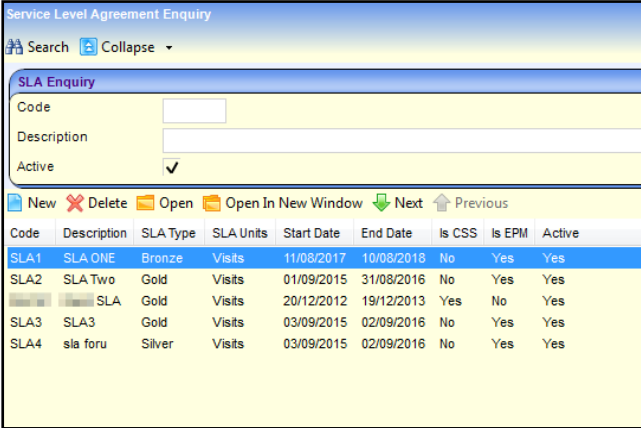
Invoice				
[redacted] Lower School High Street, [redacted], BEDFORD, Simshire, [redacted]			Invoice number: PRG00003 Invoice date: 14/10/2015 Our reference:	
Start date	End date	Visitor	Fee code	Fee
23/05/2002	23/05/2002	[redacted]	Budget Planning	£272.73
				£272.73

The report can be managed via the Report Manager. For more information, see [Managing EPM Reports](#) on page 87.

10 | Administering Service Level Agreements

Introduction

Service Level Agreements (SLAs) are created in the v4 Client via **Focus | Services | Service Level Agreements | Maintain Service Level Agreement**.



Service Level Agreement Enquiry

Search Collapse

SLA Enquiry

Code:

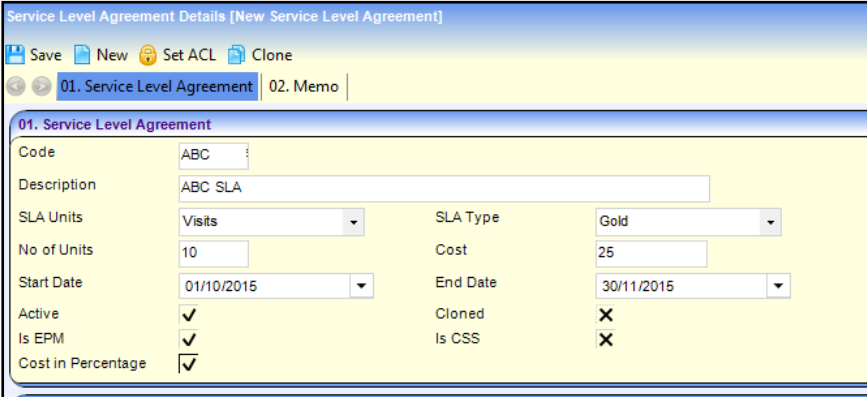
Description:

Active:

New Delete Open Open In New Window Next Previous

Code	Description	SLA Type	SLA Units	Start Date	End Date	Is CSS	Is EPM	Active
SLA1	SLA ONE	Bronze	Visits	11/08/2017	10/08/2018	No	Yes	Yes
SLA2	SLA Two	Gold	Visits	01/09/2015	31/08/2016	No	Yes	Yes
	SLA	Gold	Visits	20/12/2012	19/12/2013	Yes	No	Yes
SLA3	SLA3	Gold	Visits	03/09/2015	02/09/2016	No	Yes	Yes
SLA4	sla foru	Silver	Visits	03/09/2015	02/09/2016	No	Yes	Yes

To enable the SLA to be used in EPM and assigned to a base, the **Is EPM** check box and the **Active** check box must be selected as shown in the following graphic:



Service Level Agreement Details [New Service Level Agreement]

Save New Set ACL Clone

01. Service Level Agreement 02. Memo

01. Service Level Agreement

Code: ABC

Description: ABC SLA

SLA Units: Visits SLA Type: Gold

No of Units: 10 Cost: 25

Start Date: 01/10/2015 End Date: 30/11/2015

Active: Cloned:

Is EPM: Is CSS:

Cost in Percentage:

NOTES: If the **Cost in Percentage** check box is selected, the SLA will be applied as a percentage. An SLA that is defined in CSS cannot be selected in the EPM portal.

For more information, see [Defining a New SLA](#) on page 18.

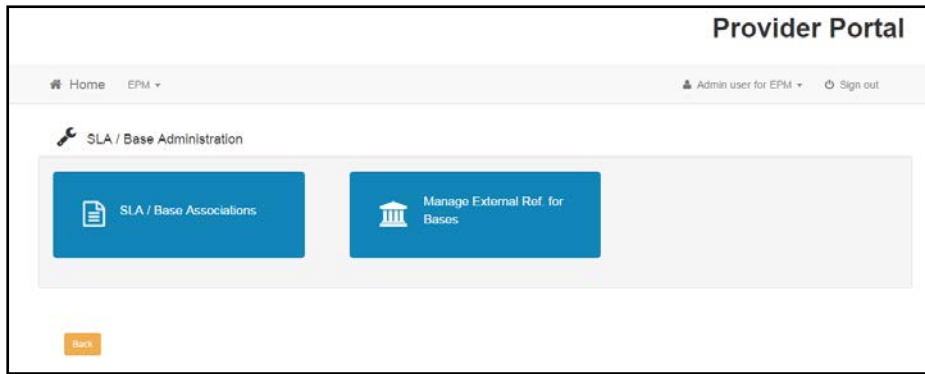
Assigning a Service Level Agreement to a Base

A Service Level Agreement SLA can be assigned to one or more bases. This enables costs to be calculated based on the SLA.

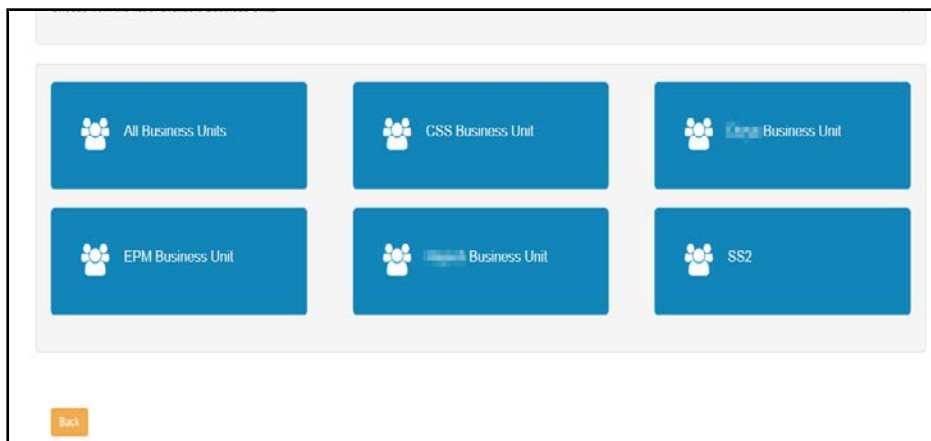
Adding a New SLA/Base Association

1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.

Administering Service Level Agreements



2. Select the **SLA/Base Associations** tile to display the business unit selector page.



3. Select the required business unit to display the **SLA/Base Associations** page.

Code	Description	Base	Active	Start Date	End Date	Memo		
DIV01	SLA Code	Playgroup	✓	30/09/2015	09/10/2015	✓		Actions
DIV01	SLA Code	Playgroup	✓	30/09/2015	09/10/2015	✓		Actions
t1		Village Primary School	✓	01/09/2015	21/10/2015			Actions
t1		Primary School	✓	01/09/2015	21/10/2015			Actions
Test	Test EPM SLA	Playgroup	✓	01/09/2015	31/12/2016	✓		Actions
Test	Test EPM SLA	Playgroup	✓	01/09/2015	31/12/2016			Actions
Test	Test EPM SLA	Village Primary School	✓	01/09/2015	31/12/2016			Actions
Test01	Test SLA Code01	Middle School	✓	01/10/2015	31/10/2015			Actions
Test01	Test SLA Code01	Insions	✓	01/10/2015	31/10/2015			Actions
Test01	Test SLA Code01	College	✓	01/10/2015	31/10/2015			Actions

4. Click the **Add** button to display the **SLA/Base Associations: Add** page.

5. Select an **SLA Code** from the drop-down list of SLAs defined for EPM. For more information, see [Defining a New SLA](#) on page 18.

The fields are automatically completed with the details of this SLA as shown in the following graphic:

6. Click the **Base (s)** browse button to display the **Base Search** dialog with the bases currently associated with the SLA selected.

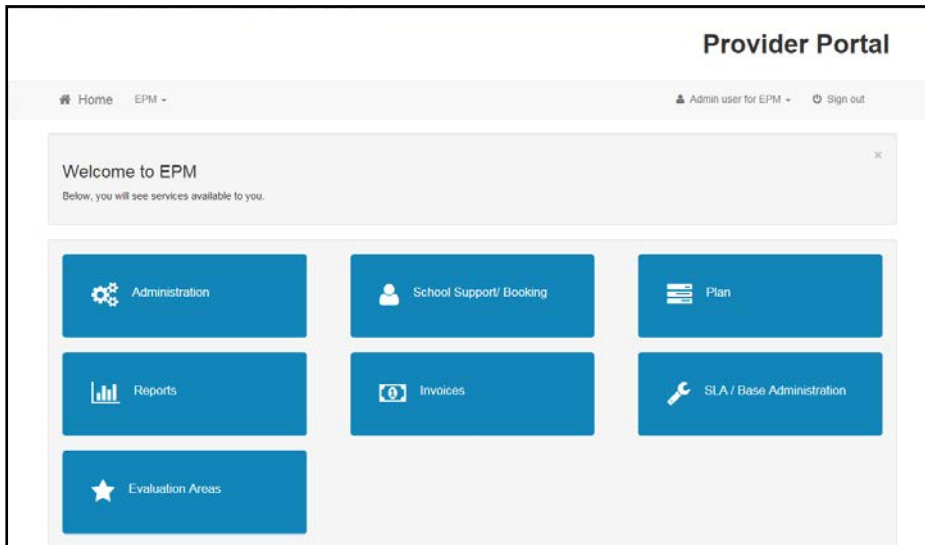
Administering Service Level Agreements

Base Name	Base No	LEA No	Base Type
<input checked="" type="checkbox"/> 0000	0000	309	AGY
<input checked="" type="checkbox"/> 4901	4901	931	IND
<input checked="" type="checkbox"/> 6207	6207	933	IND
<input checked="" type="checkbox"/> 6007	6007	931	IND
<input type="checkbox"/> 3257	3257	881	PRI
<input type="checkbox"/> 3105	3105	933	PRI
<input type="checkbox"/> 3103	3103	937	PRI
<input type="checkbox"/> 4789	4789	999	HIG
<input type="checkbox"/> 4001	4001	999	JUN
<input type="checkbox"/> 2565	2565	888	PRI

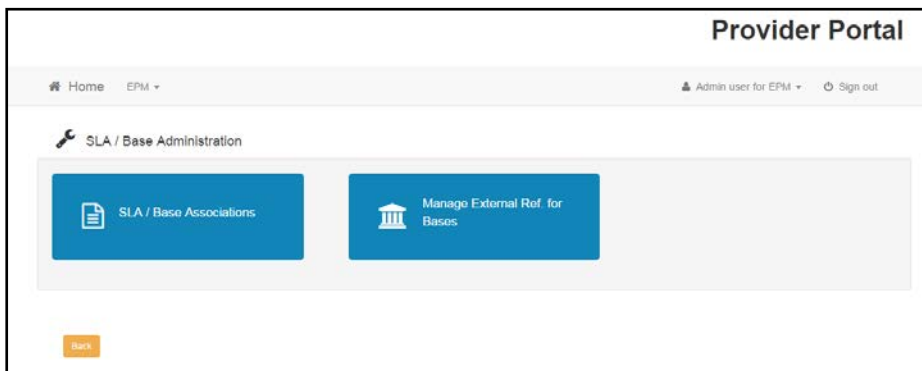
7. To associate a new base or bases:
 - a. If required, enter search criteria and click the **Search** button.
 - b. Select the required check boxes.
 - c. Click the **Select** button to display the **SLA/Base Associations: Add** page showing the selected **Base(s)**.

8. If required, enter **Notes** about this association.
9. Click the **Save** button.

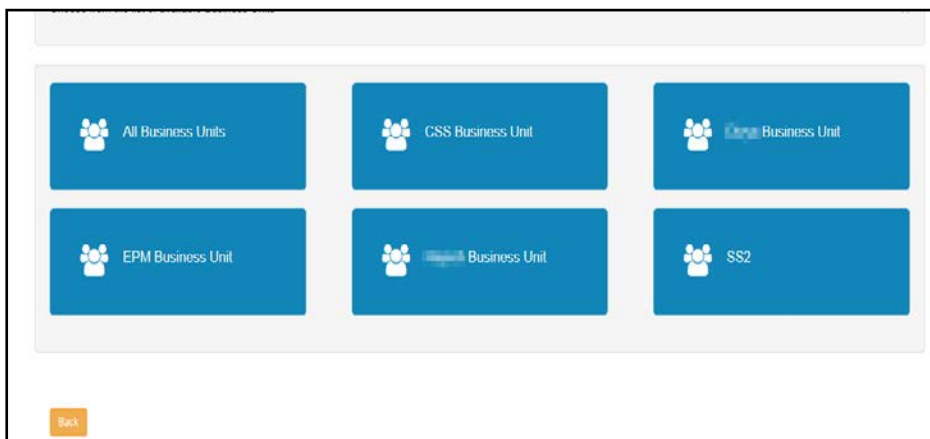
Viewing SLA/Base Associations



1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.



2. Select the **SLA/Base Associations** tile to display the business unit selector page.



3. Select the required business unit to display the **SLA/Base Associations** page.

Administering Service Level Agreements

Code	Description	Base	Active	Start Date	End Date	Memo	Actions
DIV01	SLA Code	3 Dimensions	<input checked="" type="checkbox"/>	30/09/2015	09/10/2015	<input checked="" type="checkbox"/>	Actions
DIV01	SLA Code	Playgroup	<input checked="" type="checkbox"/>	30/09/2015	09/10/2015	<input checked="" type="checkbox"/>	Actions
t1		Village Primary School	<input checked="" type="checkbox"/>	01/09/2015	21/10/2015		Actions
t1		Primary School	<input checked="" type="checkbox"/>	01/09/2015	21/10/2015		Actions
Test	Test EPM SLA	3 Dimensions	<input checked="" type="checkbox"/>	01/09/2015	31/12/2016	<input checked="" type="checkbox"/>	Actions
Test	Test EPM SLA	Playgroup	<input checked="" type="checkbox"/>	01/09/2015	31/12/2016		Actions
Test	Test EPM SLA	Village Primary School	<input checked="" type="checkbox"/>	01/09/2015	31/12/2016		Actions
Test01	Test SLA Code01	Middle School	<input checked="" type="checkbox"/>	01/10/2015	31/10/2015		Actions
Test01	Test SLA Code01	Dimensions	<input checked="" type="checkbox"/>	01/10/2015	31/10/2015		Actions
Test01	Test SLA Code01	College	<input checked="" type="checkbox"/>	01/10/2015	31/10/2015		Actions

NOTE: If you select **All Business Units**, the data displayed is read-only.

- If required, enter a filter and click the **Search** button:
 - Enter a full or partial **Code** or **Base**.
 - Select the **Active** check box.
 - Enter a date range.
- Click the **Code** link to display the details of the **SLA/Base Association**.

SLA / Base Associations: Edit

Base: 3 Dimensions | SLA Code: Test

Description: Test EPM SLA | Active: Cloned

Type: TEST | Units: VSTS

No. Units: 1 | Costs: 25.0

Start Date: 01/09/2015 | End Date: 31/12/2016

Notes: [Text Area]

Buttons: Back, Save

Editing SLA/Base Associations

The notes for an SLA/Base association can be updated. No other fields can be edited.

- View the required SLA/Base Association. For more information, see [Viewing SLA/Base Associations](#) on page 97.
- Click the **Actions** button adjacent to the SLA / Base association that you want to edit to display the **Actions** dialog.
- Click the **Edit** button to display the **SLA / Base Association: Edit** page.

- If required, enter **Notes** and click the **Save** button.

Adding a Linked File to an SLA/Base Association

One or more linked files can be added to an SLA/Base association.

NOTE: The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.

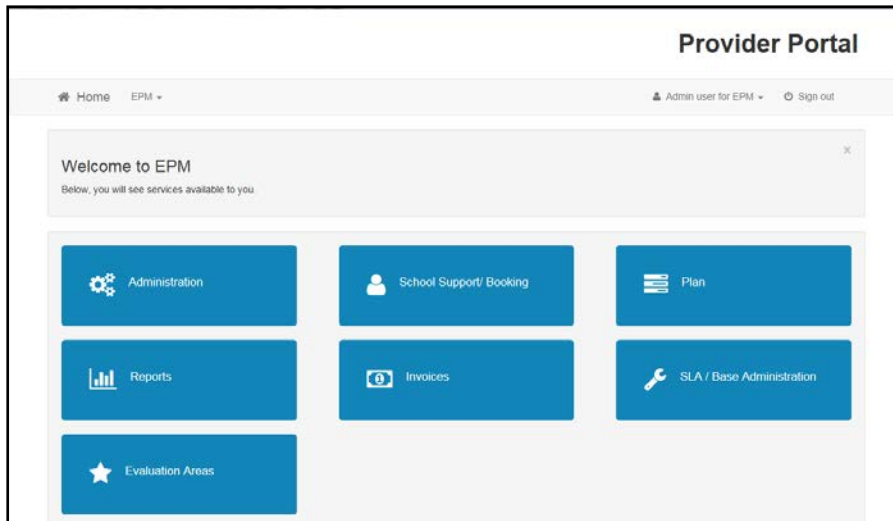
- View the required SLA/Base Association. For more information, see [Viewing SLA/Base Associations](#) on page 97.
- Click the **Actions** button adjacent to the SLA / Base association to which you want to add a linked file to display the **Actions** dialog.
- Click the **Linked Files** button to display the **Linked Files** page.
- Click the **Add** button.

- Enter a **Description**.
- Click the **Select File** button and select the required file.
- Click the **Save** button.

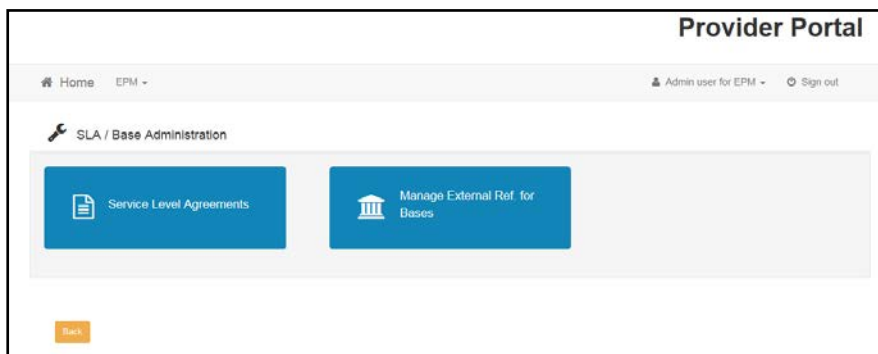
Managing External References

An external reference code can be used to link a base to an external system e.g. a financial system. A standard report of bases with a reference numbers can be produced. For more information, see [Managing Reports](#) on page 85.

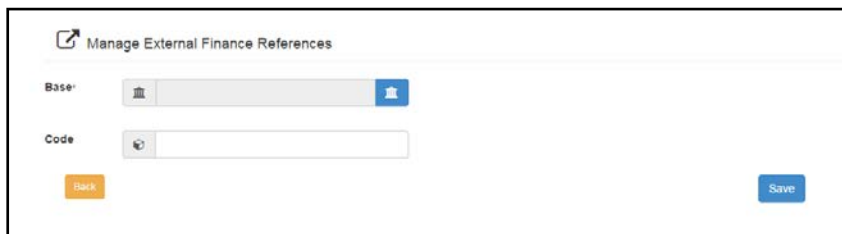
Administering Service Level Agreements



1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.



2. Click the **Manage External Ref. for Bases** tile to display the **Manage External Finance References** page.

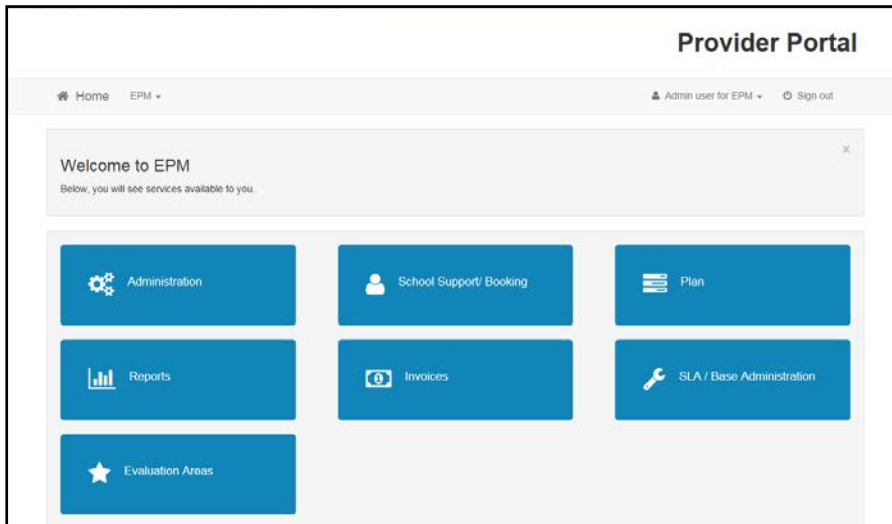


3. Click the **Base** browse button to display the **Base Search** and select a base. For more information, see [Selecting a Base](#) on page 60.
4. Enter an external reference **Code**.
5. Click the **Save** button.

11 / Managing Evaluation

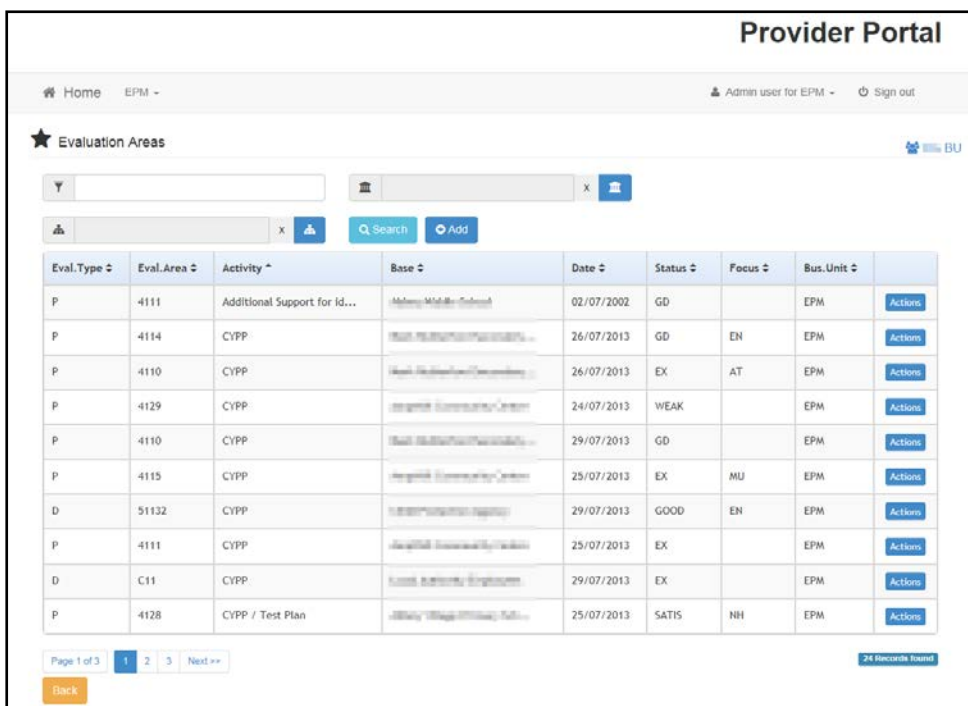
Managing Evaluation Areas

Evaluation areas are accessed via the **Evaluation Areas** tile on the **Welcome to EPM** page. Evaluation types are Effective Practice (P) and Development (D).



Displaying Evaluation Areas

1. Click the **Evaluation Areas** tile on the **Welcome to EPM** page to display the **Business Units selector** page.
2. Select the required business unit to display the **Evaluation Areas** page.



3. To filter the record list:

Managing Evaluation

- a. Enter a filter of **Evaluation Area, Base, Activity** or **Status**.
- b. Search for a base as follows:
 - i. Click the **Base** browse button to display the **Base** search and select a base.
 - ii. Click the **Search** button.
- c. Search for an activity as follows:
 - i. Click the **Activity** browse button to display the **Select an Activity** dialog.
 - ii. Click the **Search** button.

Adding a New Area of Effective Practice

1. Display the evaluation areas. For more information, see [Displaying Evaluation Areas](#) on page 101.
2. Click the **Add** button to display the **Evaluation Area Details: Add** page.
3. Select the **Area of Effective Practice** radio button.

The screenshot shows the 'Evaluation Area Details: Add' form. At the top, there is a title bar with a user icon and the text 'Evaluation Area Details: Add'. Below this, there are two radio buttons for 'Eval.Type': 'Area of Effective Practice' (selected) and 'Area for Development'. The form contains several input fields: 'Base' with a browse button, 'Activity' with a browse button, 'Practice' with a drop-down menu showing '-Please select-', 'Status' with a drop-down menu showing '-Please select-', 'Focus' with a drop-down menu showing '-Please select-', 'Support' with a browse button and a close button (X), 'Date' with a calendar icon and a text input field containing 'dd/mm/yyyy', 'Observed By' with a browse button and a close button (X), and 'Is Confidential' with a checkbox. At the bottom, there is a 'Notes' field with a rich text editor toolbar and a 'How to Format' link. There are 'Cancel' and 'Save' buttons at the bottom left and right respectively.

4. Click the **Base** browse button to select a base.
5. Click the **Activity** browse button to select an activity.
6. Select a **Practice** from the drop-down.
7. Select a **Status** from the drop-down.
8. If required, select a **Focus** from the drop-down.
9. If required, click the **Support** browse button to display the **School Support / Booking** dialog and select the required booking.
10. Enter a **Date**.
11. If required, click the browse button to display the **Support Staff Search** dialog and select an **Observed By** person.

Adding a New Area for Development

1. Display the current evaluation areas. For more information, see [Displaying Evaluation Areas](#) on page 101.
2. Click the **Add** button to display the **Evaluation Area Details: Add** page.
3. Select the **Area of Development** radio button.

The screenshot shows the 'Evaluation Area Details: Add' form. At the top, there are radio buttons for 'Area of Effective Practice' and 'Area for Development'. Below this are several input fields: 'Base' (with a browse button), 'Activity' (with a browse button), 'Development' (dropdown menu), 'Status' (dropdown menu), 'Focus' (dropdown menu), 'Support' (with a browse button and a close button), 'Date' (with a date picker), 'Observed By' (with a browse button and a close button), 'Is Confidential' (checkbox), and 'Notes' (rich text editor). At the bottom left is a 'Cancel' button and at the bottom right is a 'Save' button.

4. Click the **Base** browse button to select a base.
5. Click the **Activity** browse button to select an activity.
6. Select a **Development** from the drop-down.
7. Select a **Status** from the drop-down.
8. If required, select a **Focus** from the drop-down.
9. If required, click the **Support** browse button to display the **School Support / Booking** dialog and select the required booking.
10. Enter a **Date**.
11. If required, click the browse button to display the **Support Staff Search** dialog and select an **Observed By** person.

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