

Capita



# Citizen Portal - Admissions Preparation for Next Year

Professional Services

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# Contents

<b>Contents</b> .....	<b>2</b>
<b>Introduction</b> .....	<b>3</b>
<b>Benefits</b> .....	<b>3</b>
<b>Pre-requisites</b> .....	<b>4</b>
<b>Service Overview</b> .....	<b>5</b>
<b>Service Details</b> .....	<b>6</b>
Session 1 (Onsite): Review .....	6
Session 2 (Onsite): Review if Module functionality .....	7
Session 3 (Remote): Admissions Roadmap .....	8
Session 4(Remote): Check-up Opening the rounds.....	9
<b>Additional Service Options</b> .....	<b>10</b>

## Introduction

Admissions is a cyclical process, year on year the deadlines are the same, but knowledge and people leave and change. Even in stable teams remembering why and how to configure the module is relevant on legacy notes.

The Admissions and Transfers module, with all the additional components for parental applications and using the portal for schools, means there are layers of configuration that must be setup and interlinked.

This is essentially a system health check of setup, an opportunity to review changes to software up to the summer release, and have support for working with the transition from the current to the next year.

There are 4 elements:

- Best value review
- New features
- Roadmap
- Pre go live support

## Benefits

This provides your admissions team with a streamlined mini project to take stock of the module to make sure they are prepared for the new admissions rounds.

We review how the module is being used, sharing good practice from different Local Authorities; the latest changes to the module, and unused features. We produce a template, planning a to do list for each transfer group, to signpost you through the year. Plus a final checks session to copy or check the setup that has been done and ready for the opening of the admissions rounds.

- We start by listening to and understanding your local admissions challenges so we appreciate how you can get the best out of the software.
- Review recent changes to the module that will impact on working practices, by demonstrating them so they are more meaningful.
- Finally, we don't abandon you once you are about to go live. We check your setup, or do the setup together.

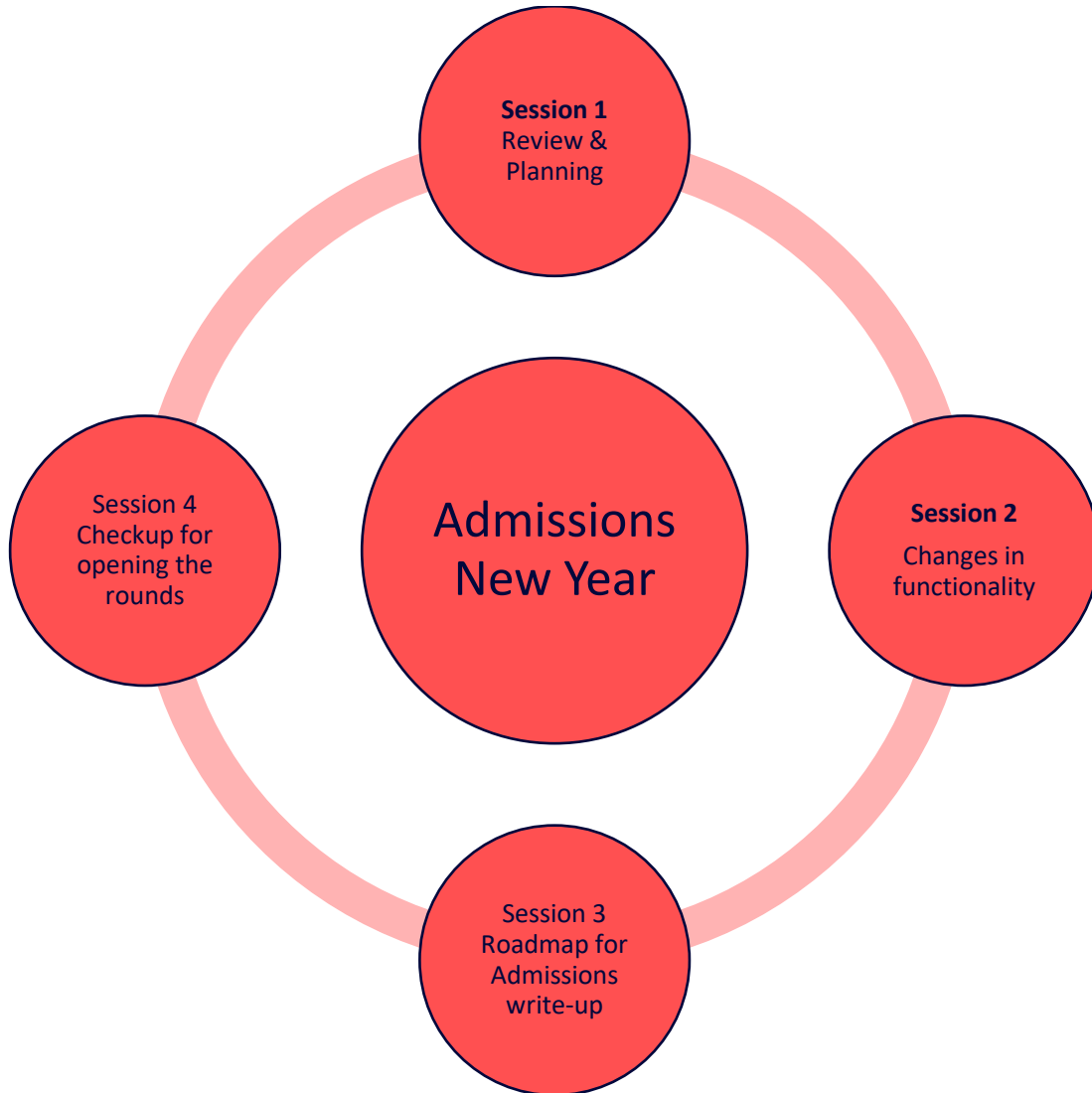
## Pre-requisites

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

- Have the A&T Backoffice, and Bases module
- Access to participate in Microsoft Teams and or Webex sessions for support and configuration by the knowledge specialist
- One database at the current version or previous version
- Appropriate access to all One Clients for the Knowledge Specialist

## Service Overview

Capita will assist in the successful implementation of the Citizen Portal for Schools Admissions by providing the following:



Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

# Service Details

## Session 1 (Onsite): Review

Length of session – 3 hours, it can be remote if preferred

<b>Key Prerequisites</b>	<ul style="list-style-type: none"> <li>• Location for a meeting with access to screen</li> <li>• Access to a workstation with full access to One live and test, with system admin rights for V4 Client, A&amp;T Backoffice and the Citizen Portal</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Establish how the module has performed in the current year and challenges for the next admissions round</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• Admissions Managers to understand their service needs</li> <li>• One Support – impact on One and reporting and support</li> <li>• Admissions users</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• A&amp;T module usage questionnaire</li> <li>• Module review – walk through how the module is setup</li> <li>• Challenges the admissions team from the current year</li> <li>• Next admission round changes to schools and Scheme</li> <li>• Summer term challenges</li> <li>• In-Year admissions</li> <li>• System routines and impact on other users</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• All parties have a mutual understanding of the service requirements, and resources needed for the next admissions round</li> </ul>

## Session 2 (Onsite): Review if Module functionality

Length of session – 3 hours, must be taken on the same day as Session 1

<b>Key Prerequisites</b>	<ul style="list-style-type: none"> <li>• Location for a meeting with access to screen</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Review the changes to the software over the last 3 releases for, and establish if they are going to be used in the next admissions round</li> <li>• Following session 1 understand functionality that may be of benefit for the next admissions round</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• Admissions Managers to understand their service needs</li> <li>• One Support – impact on One and reporting and support</li> <li>• Admissions users</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• Review A&amp;T Backoffice</li> <li>• Citizen Portal</li> <li>• Portal for schools</li> <li>• System wide changes that impacts on Admissions</li> <li>• New to LA functionality - demonstration</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• All parties have a mutual understanding of how the functionality may change and if there are new or existing features, they need to use for the next admissions round</li> </ul>



## Session 3 (Remote): Admissions Roadmap

<b>Objectives</b>	<ul style="list-style-type: none"><li>• Produce a customised checklist for the Admissions team to use that follows the key milestones and process for each transfer group</li></ul>
<b>Outcomes</b>	<ul style="list-style-type: none"><li>• The admissions team will have a plan they can follow that will sign post them to help and guidance in either the documentation or supplied process notes</li></ul>

## Session 4(Remote): Check-up Opening the rounds

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• Key contact for the Knowledge Specialist to contact who has full systems access to the One V4 Client, Online Client, and access to Crystal or permissions to run reports</li> <li>• Able participate in MS Teams, and Webex meetings</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Transfer groups are ready to receive applications</li> <li>• Answer any queries the Admissions team for supporting applications</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One coordinator or Key contact with full access to One</li> <li>• Admissions team</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• Copy the Transfer Groups with the admissions team</li> <li>• Check the new transfer groups and make changes as identified in session 1</li> <li>• Check the setup for Citizen Portal and make changes to text</li> <li>• Run data quality reports</li> <li>• Check the email service is running in test</li> <li>• Populate the transfer groups as required</li> <li>• Present and hand over Admissions Roadmap</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• The admissions team are confident the groups are applicant ready</li> </ul>

## Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
<p><b>Reporting (Off Site)</b> Adapting reports to support local needs</p> <p><b>Benefits</b> Reporting for a module the report writer in the LA is not familiar with is time consuming. We understand how the tables and links work and have similar reports .....</p> <p><b>Cost:</b></p>	<p>6</p>	<p>One Administrator Admission Manager</p>
<p><b>Portal – Citizen Admissions and Transfers (Off Site &amp; Onsite)</b> Using the software to manage Transfer applications</p> <p><b>Benefits</b></p> <p><b>Cost:</b></p>		
<p><b>Portal – Citizen Late’s (Off Site &amp; Onsite)</b> Adapting software to manage phase and In-year phase applications</p> <p><b>Benefits</b></p> <p><b>Cost:</b></p>		