Capita

Citizen Portal – Admissions & Transfers Refresher

Professional Services

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Contact Capita

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Contents

Introduction

Managing school places is never an easy task, not least because the process can involve complex parental enquiries, where detailed knowledge of each application is crucial.

The Citizen Portal for Admissions and Transfers is a powerful extension to the core A&T Module. Providing a convenient online self-service portal for all school applications across your authority. It simplifies the whole process, empowering parents and carers by giving them access to what they need.

Because the portal is accessed by families and the back-office elements of One Admissions & Transfers are fully integrated, using the module effectively is the key to success. The online application is the main source of data to the Admissions Module. Over time the percentage of applications has climbed from 10% to some local authorities achieving 95% online applications.

Benefits

This refresher provides your admissions team with an opportunity to review if they are getting the best use out of the module. It is an opportunity to.

- Train new staff, and staff with inherited knowledge

- Review best practice used by other admissions teams to maximise applications and minimise the need to contact parents for clarifications

- Provide training so you can confidently test and to support parents

- Get help to setup the live environment, ready for parents to apply online. Feel confident you can maintain and adapt to challenges parents present

- Test new features and opportunities the product offers

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

- Email service for One configured for One

- File upload configure for One

- Appropriate access to all One Clients for the Knowledge Specialist

Service Overview

Capita will assist, revisit, and review your use Citizen Portal for Schools Admissions by providing the following:
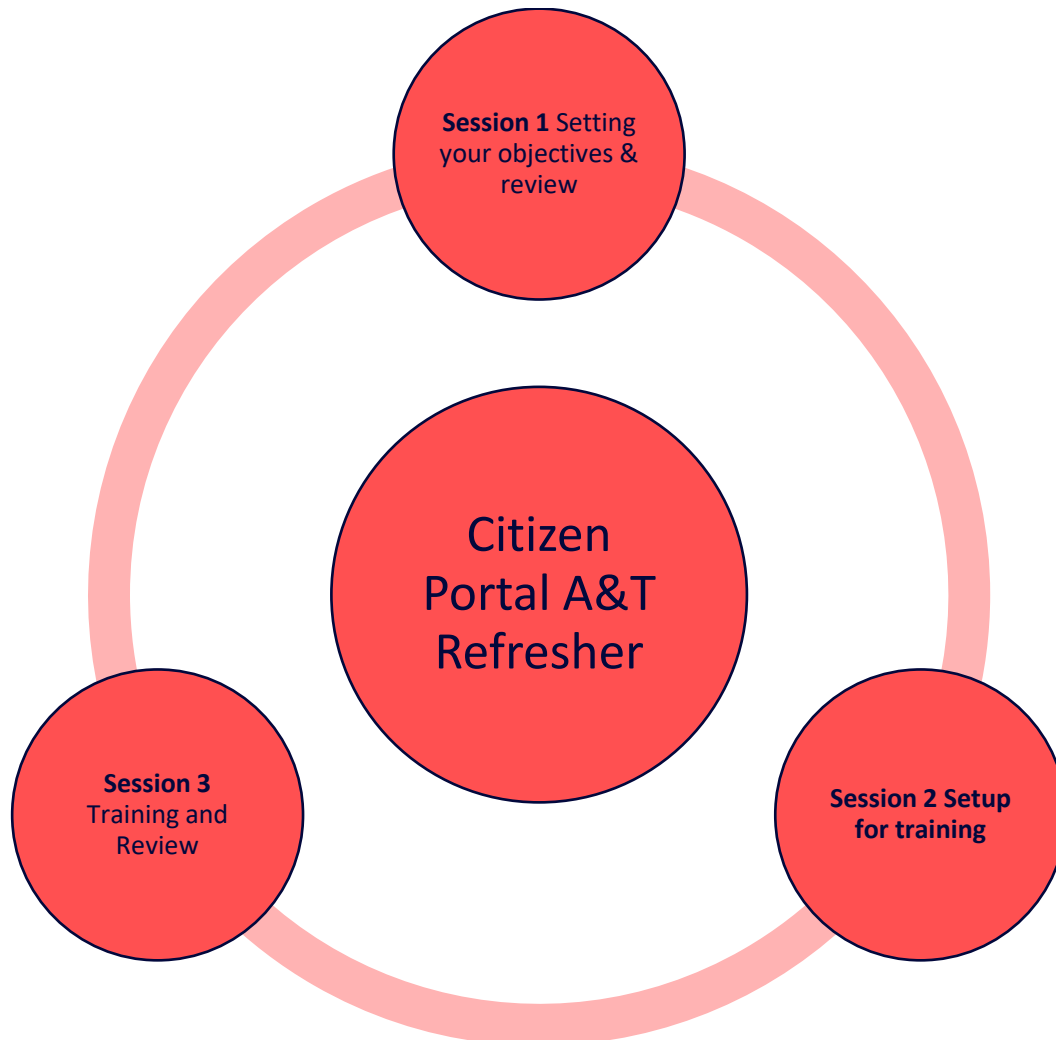
Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the 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(Remote): Refresher Scoping

Key Prerequisites (full list provided in RAID log)	• Location for a meeting with access to screen • Access to a workstation with full access to One Test, with system admin rights for V4 Client, A&T Backoffice and the Citizen Portal • Test is recent copy of live
Objectives	• Review how you are using the Citizen Portal for School Admissions • Understand the challenges you face • Agree what your training objectives are and what the training should focus on
Audience	• Admissions Managers to understand their service needs • One Support – impact on One and reporting and support
Standard Agenda	• Review the parents experience via the Test system • Local challenges – schools, parents and data needed for applications • Review the requirements how the Admissions and Transfer Process (End of Phase, e.g. Primary to Secondary) • Agree training agenda for on-site sessions
Outcomes	• All parties have a mutual understanding of what they want to achieve from the work package

Session 2(Remote): Configuration of Test

Key Prerequisites (full list provided in RAID log)	• 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 • Key contact has can participate in MS Teams, and Webex meetings
Objectives	• Set up the Test Environment • Skim test it works form Parent application to import into the ONE
Audience	• One coordinator or Key contact with full access to One • Admissions team lead be available for any key questions
Standard Agenda	• Configure A&T Backoffice and Bases, copying transfer groups • Setup features not used currently that are needed for training • Configure the Citizen Portal for School Places • Skim test – Registration, Application, Process in the Back Office
Outcomes	• Test system is working end to end, ready for training

Session 3(Onsite): User Training

Key Prerequisites (full list provided in RAID log)	• 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 • Venue for session and users have access to Test for both the A&T BackOffice, Citizen Portal and emails. • If emails are not active in test users will been to register as parents prior to the session to allow for accounts to be activated, users may also prefer to you're a non-work email account to test access from outside the office.
Objectives	• Understand the parents experience • Know how to match and process applications • Have a clear view of what they want to adopt in their live environment • Understand how to apply changes to the live environment
Audience	• One coordinator or Key contact with full access to One • Admissions team
Standard Agenda	• Overview of end to end application • Parent experience - Applications • Parent experience – Offers and Acceptances • Additional Questions • File uploads • Changing text and how to find it • Late's, allowing parents to continue applying – (NEW functionality for Summer planned) • Latest changes in the module
Outcomes	• The admissions team are confident to apply to live • Feel confident to invite other colleagues to make parent applications

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
Reporting (Off Site) Adapting reports to support local needs **Benefits** Importing data from the general public needs checking and review, we have extensive experience in this area, but every customer is different. Working with the team we a quick provide a set of up to 10 reports that will underpin the implementation **Cost:**	6	One Administrator Admission Manager
Portal – Citizen In-Year (Off Site & Onsite) Adapting software to manage phase and In-year phase applications **Benefits** **Cost:**		