Capita

Citizen Portal – Free School Meals Refresher

Professional Services

Copyright

Contact Capita

Contact your account manager or simon.pixley@capita.com for further details relating to this.

Contents

Introduction

Eligibility for Free School Meals is more than a funded lunch for a child, it opens entitlement to additional funding to support their education within the school. Overall it is a key indicator of social deprivation for the Local authority.

The Grants and Benefits module is the foundation for the Citizen Portal for Free School Meals. Implementing both modules together makes perfect sense to getting the maximum benefit from your investment in time and resources.

Overall using the Grants and Benefits with Citizen Portal

- Improves the experience for parent, because they can get an immediate response

- The quality of the data submitted integrates with the One system

- Maximizes potential Pupil Premium Funding for schools

- Reduces costs of communicating with parents, because changes to status of applications can be shared via the Citizen Portal

- Claims can auto import into the Grants and Benefits module

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 Grants and Benefits teams to maximise applications and minimise the need to contact parents for clarifications

- Provide training so you can confidently support parents

- Understand the live environment up so you are ready for parents to apply online, and feel confident that 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 Grants and Benefits, FSM Citizen Portal 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:
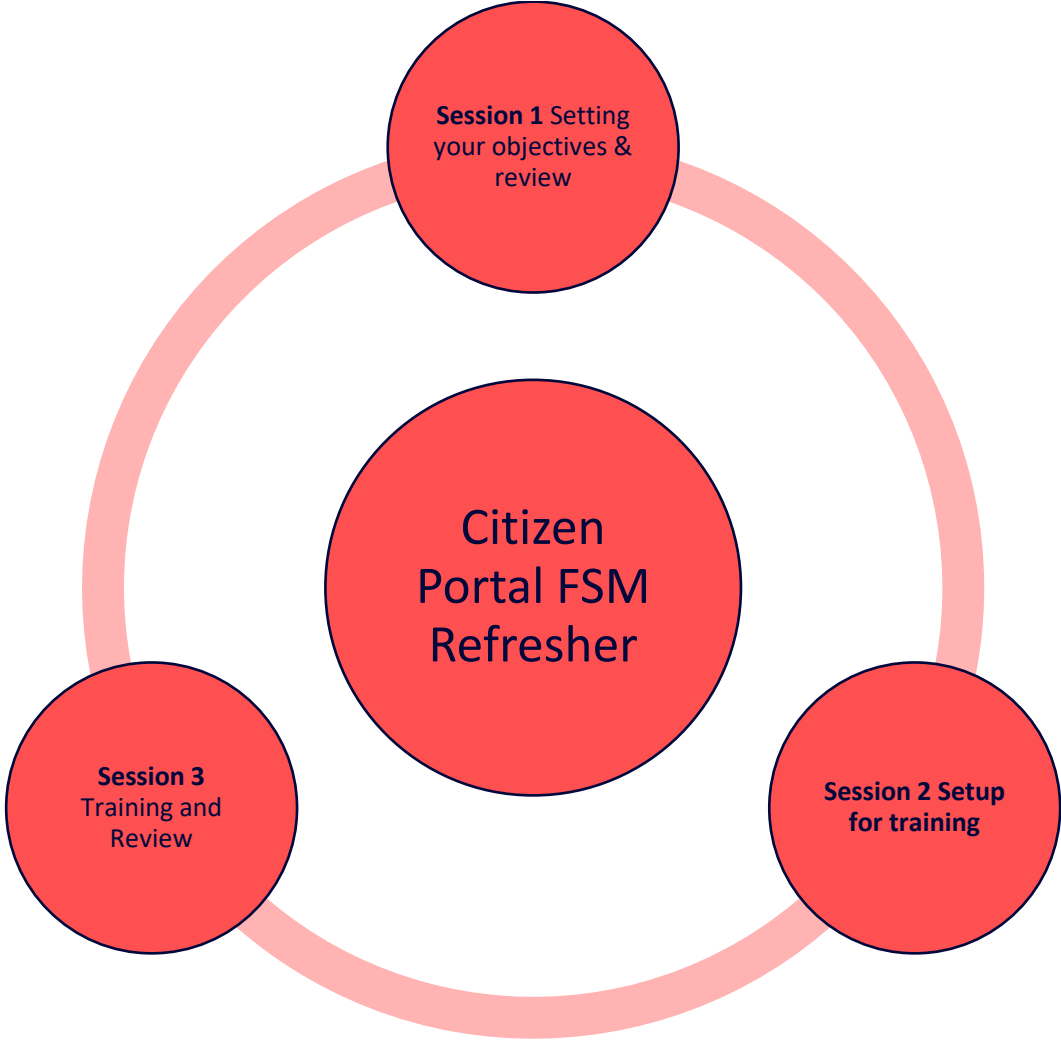
Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the 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, and the Citizen Portal • Test is recent copy of live
Objectives	• Review how you are using the Citizen Portal for Free School Meals • Understand the challenges you face • Agree what your training objectives are and what the training should focus on
Audience	• Grants and Benefits 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 Grants and Benefits 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 • Grants and Benefits team lead be available for any key questions
Standard Agenda	• Configure Grants and Benefits, Bases and Citizen Portal for FSM • Setup features not used currently that are needed for training • Configure the Citizen Portal for new features • Skim test – Registration, Application, Process in One
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 V4 Online, 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 • Grants and Benefits team
Standard Agenda	• Overview of end-to-end application • Parent experience - Applications • Parent experience – Messages to screen • Additional Questions • Changing text and how to find it • Latest changes in the module
Outcomes	• The Grants and Benefits team are confident to apply new knowledge to live

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 G&B Manager