

CMS Package

Introduction

Together with the AMS-HOPS Package, the CMS Package forms the foundation of SAM's Managed Service. It offers members a fully managed, dependable back-office system for managing customers, cards, and products. It can support a range of smart ticketing schemes, from standard ENCTS concessionary schemes to the most complex commercial schemes.

The SAM CMS covers the full customer life cycle from initial application through card issuance and ongoing management. Our powerful application processing tools allow users to manage entitlement checking with ease. The system supports Hotlisting for lost/stolen cards and has comprehensive renewal management functionality, including usage-based renewal rules to reduce the overhead for ongoing scheme management.

The CMS Package also includes an ENCTS Web Portal, which allows customers to apply for, manage, and renew their passes online. The portal also allows users to self-serve address and photo updates and order and pay for replacement passes.

The CMS Package is fully integrated with the other SAM Managed Service Packages, such as the AMS-HOPS and Web Portal Packages, to provide a best-in-class experience.

As a SAM Member, when purchasing a Managed Service package from us, you are not just getting access to the software from the Supplier, but the support of a team dedicated to ensuring you can get the best out of your integrated smart system – however large or small that may be.

Services Provided within the CMS Package

The services provided as part of the CMS Package are based upon providing a CMS partition to the required functionality defined within the National Procurement Framework Technical Specification. In addition, the CMS Package provided by SAM includes the following services:

1. Standard CMS Performance Management.
2. Core Technical Functionality.
3. ENCTS Web Service.
4. Enhanced Customer Reporting via SAM Data Visualisation Service.
5. Supplier Liaison & Management.
6. CMS Supplier Service Levels (SLAs).
7. SAM Member CMS Support.

Standard CRM Performance Management

- Daily (M/F) monitoring of the CMS to ensure systems operate correctly.
- Run weekly reports within the CMS to monitor overall performance.
- Liaise with the Supplier where anomalies are identified.
- Report risks of threat to Members.
- UAT testing of all system upgrades before they go live.
- Managing interfaces between connected systems (both within the Managed Service and externally).
- Checking and validating data exports to the SAM Data Visualisation Service (DVS).

Concessionary Travel Web Service

The CMS Package includes a web service for Local Authorities / PTAs / Other Public Sector Members to manage online Concessionary Travel Applications and Renewals. The web service is focussed upon enabling customers to manage their own accounts and is designed to be:

- Intuitive to use and device responsive.
- Manage new card applications, replacements, and renewals.
- Configured for your business rules, including identity check.
- Compliant with accessibility and GDPR standards.
- Branded with the Council's own branding.
- Fully integrated with CMS/CRM

Enhanced Customer Reporting via SAM Data Visualisation Service

The Data Visualisation Service (DVS) is SAM's own bespoke reporting platform for Members. The basic package is provided at no additional cost to all CMS

Package customers. DVS enables a secure platform for:

- Monitoring and verifying import data.
- BAU review of product performance.
- Production of Member specific reports – weekly, monthly, and annual usage
- Bespoke products report service (available from SAM via email or phone)
- Onsite DVS training where required.
- Ability to undertake 'What If' analysis and drill down to transaction level.
- Provide bespoke data to support the police and other agencies where needed.
- Fraud and similar trend identification.

To ensure that as many members can benefit from DVS, it has been developed to run using Tableau, a freely available data presentation platform.

Supplier Liaison & Management

- Assessment of performance against SLAs.
- Regular Account meetings with key Suppliers.
- Registering identified issues with the Service Desk.
- Managing issues through weekly calls
- Broker support between Supplier and Member as required.
- Project escalation and solution standardisation as required.
- Identification of new opportunities.
- UAT testing Inc. advice and guidance.
- Testing advice and guidance.

SAM Member CMS Support

- Provision of 0900-1700 M/F phone support for Members.
- Provision of email support for Members.
- Provision of access to CMS Call Service Desk 0900-1700 M/F for Members.
- Access Member's CMS partitions to resolve queries as required.
- Log issues with Supplier(s) as required.

- Work with the supply chain to identify the source of the issue.
- Oversee management of resolving any identified issues.

ENCTS Web Front End (FESSI) Package

The SAM Self-Service Interface provides an online Portal interface to process concessionary pass applications, including uploading photos and any proof documents required as part of the application process. In addition, the Self-Service Interface allows concessionary pass holders to manage their accounts, including requesting, paying for a replacement pass, and updating their details. Finally, the interface enables customers to renew their passes, including uploading proof documents as required.

- The Self-Service Interface integrates seamlessly with the SAM CMS, allowing Local Authority staff to view, approve, and manage all accounts via the standard CMS interface.
- Although delivered through a single software platform to ensure consistency of delivery and the ability to apply improvements across all instances, each self-service interface is branded to match the branding of the relevant Local Authority to provide a seamless end-user experience.

Concessionary Travel Portal (FESSI) Implementation

- Explore required functionality with the Member.
- Develop and agree on an implementation plan with all parties.
- Supplier management throughout the process.
- FESSI Set Up assistance.
- Identification of new opportunities.
- Managing enhancements across multiple Members.

Enhanced Reporting

- Monitoring and verifying import data.
- BAU review of product performance.

- Produce Member-specific reports – weekly, monthly, and annually.
- Bespoke products report service (via email, phone and in person).
- Ongoing Support.
- Ongoing system monitoring to ensure the highest quality of service.
- Full testing of upgrades in UAT before being deployed to the live environment.
- End-to-end support, including UAT and full testing.

Troubleshooting issues

- Advice and support in developing and implementing new concessionary products.

Payment processing

- SAM will process all payments relating to replacement cards using our payment provider GOV.UK Pay.
- Any money collected for replacement cards will be paid to local authorities quarterly in arrears, net of any GOV.UK fees.
- A statement of fees charged will be provided with each payment.
- Integration with a Member's own Payment Service Provider will incur a development charge based on the complexity of the work.