

# **CPOMS - Categories and Agencies**

# **CPOMS** <u>Categories</u>

New categories can be added to CPOMS StudentSafe by an <u>Admin Key Holder</u> in school.

### How to add a new category

**Step 1** – Navigate to the **'Admin'** area > **'Categories'** tab and click on the **'New Category'** button, to the right-hand side of the page.

<b>EPOMS</b>	CPOMS Primary School 💙 🕂 Add Incident 🧟 :	🎧 Remind Me 🛛 🗞 Hide Names 🖵 Blank Screen 🔗
	There are possible student transfers  Admin	
Dashboard	Overview Settings Cases Imports Categories Agencies Calendar Users Transfers Data Sharing Groups Audits Integrations Bulk Management	Maps Add Student Form Builder Data Destruction Policies
✓ Reporting ✓ ✓ Planner	Categories Statuses Active Linactive	Show External Categories New category 3
E Library	Category name	
Overview	Edit           -(Yew/Mike/eig)         Edit	Delete/Disable Delete/Disable
Settings	- Constant	<u>Delete/Disable</u>
imports	- Charter Contrast Official Edit	Delete/Disable
Categories 2	Relation         Edit           Amount Down         Edit	<u>Delete/Disable</u>
Calendar	- Against Peers Edit	<u>Delete/Disable</u>

Step 2 – Complete the 'New Category' form.

nur 21	Child Protection		
ser Group Permissions	View Students	View Incidents	add incidents
Teachers			
Non-Teaching Staff			
Attendance Officer			
Business Manager			
Phase Leader			
Premium Cases and Forms			
Fest			



- 1. **Name -** enter the name of your new category.
- 2. **Colour** click on the coloured square to select your preferred colour, or click 'Copy category Colour' to choose a colour you have used before.
- 3. Parent Category This option is for the creation of sub-categories only. For top-level 'Parent Categories' leave blank.
- 4. Next, choose the 'User Group Permissions' for the new category, these are:-

View Students	View Incidents	Add Incidents
This permission allows users in the group to see if a student is 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

5. Lastly, click 'Save Category'.



# How to add a new sub-category

**Step 1** – Navigate to the **'Admin'** area > **'Categories'** tab and click on the **'New Category'** button, to the right-hand side of the page.

<b>C</b> POMS	CPOMS Primary School V + Add Incident	🎧 Remind Me 🔌 Hide Names 🖵 Blank Screen 🔗
сромя	Admin	
Dashboard	Overview Settings Cases Imports Categories Agencies Calendar Users Transfers Data Sharing Groups Audits Integrations Bulk Management	Maps Add Student Form Builder Data Destruction Policies
Planner	Categories Statuses Active Inactive	Show External Categories New category 3
E Library	Category name	
🔞 Admin 🛛 🚺	Edit Edit	Delete/Disable
Overview	- Internal Monitoring Edit	Delete/Disable
Settings	- Legal Action Edit	Delete/Disable
Cases	- Parent Contract Offered	Delete/Disable
	- Punctuality Edit	Delete/Disable
Aconcies	Behaviour Edit	Delete/Disable
Calendar	- (Apina Pees) Edit	Delete/Disable

Step 2 – Complete the 'New Category' form.

New Category	Meeting Copy category Colour		
User Group 4	□ View Students	□ View Incidents	Add Incidents
SLT	2		
Teachers			
Non-Teaching Staff			
Attendance Officer			
Business Manager			
Phase Leader			
Premium Cases and Forms			
			_

- 1. Name enter the name of your new sub-category.
- 2. **Colour** click on the coloured square to select your preferred colour, or click 'Copy category Colour' to select a colour you have used before.
- 3. Parent Category choose which category you would like the new sub-category to fall under.



4. Next, choose the 'User Group Permissions' for the new sub-category, these are:-

View Students	View Incidents	Add Incidents
This permission allows users in the group to see if a student is 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

5. Lastly, click 'Save Category'.

When adding an incident to the system, any sub-categories will be displayed for selection once a parent category is selected.

# Merging categories in CPOMS

If you need to merge categories for any reason in CPOMS, this can be done by an <u>Admin Key Holder</u> in school.



**Please note,** the merging of categories is <u>irreversible</u> so should only be selected if you are 100% sure.

To merge two categories together, please navigate to the **'Admin'** area, and click on the **'Categories'** tab. Next, click on **'Edit'** next to the name of the category you would like to merge.

Scroll right down to the bottom of the page and click on the 'Merge category' button.

Danger Zone	
Merge Category Once you merge a Category, there is no going back. Please be certain.	

Next, choose the category name that you would like to merge with, by typing part of its name and clicking on it. Click on **'Merge'** when you are ready.

Merge category		×
Warning: Merging c deleting this one. It cannot be undon	ategories means copying all the recorded information from this category record to another category record and e, so please ensure that you know what you are doing and that you select the correct category below.	
Merge with	Begin typing a category	*
	Cancel	ge



Once merged, all incidents assigned to the category will be re-assigned to the category you have chosen to merge with. Students currently monitored under the category will also become monitored for the category you have chosen to merge with.

# Changing a category name

If you need to amend a category name for any reason in CPOMS, i.e. a spelling error, this can be done by an <u>Admin Key Holder</u> in school.



Please do not change the meaning of a category when updating its name, as the new category name will be transferred to all past incidents logged against this category and also any students monitored for the category, past and present.

To amend a category name, please navigate to the **'Admin'** area, and click on the **'Categories'** tab. Next, click on **'Edit'** next to the name of the category you would like to update. Simply over-type the current category name, with the updated one, and scroll down to **'Save Category'**.

### How to delete a category

An <u>Admin Key Holder</u> in school can delete/ disable categories in CPOMS. Simply navigate to the 'Admin' area, and click on the 'Categories' tab. Click on 'Delete/Disable' next to the name of the category you would like to remove.

If there are no incidents assigned to the category it will be removed in full.

If the category has incidents assigned to it, the category will become disabled. This means no new incidents can be logged against the category, but incidents logged against the category can still be included in your reports.

You may also choose to 'Enable' the category again in the future if needed.



### **Example Categories**

#### **Child Protection**

- CP Plan
- Conference
- Core Group Meeting
- CIN Plan
- CIN Meeting
- C LAC
- C Previous LAC
- C LAC Review
- © PEP Meeting

#### **Cause for Concern**

- © Emotional Related
- © Neglect Related
- © Physical Related
- © Sexual Related
- C Home/Parenting Issues
- © Presentation/Hygiene

#### **Peer on Peer**

- C Verbal
- C Physical
- C Sexual
- Conline
- © Racial/Racist
- © Prejudice-based/Discriminatory

#### **Mental Health and Wellbeing**

- C Anxiety
- © Depression
- © Suicidal Thoughts
- C Self Harm
- © Eating Disorder
- © Substance Abuse

#### **Contact with Parents**

- C Telephone Call
- C Text Message
- C Email
- C Face to Face Conversation
- C Face to Face Meeting
- C Virtual Meeting

#### Attendance

- © Internal Monitoring
- C Legal Action
- © Parent Contract Offered
- © Punctuality
- © Unexplainable&/or persistent absence from education

#### **Safeguarding Concern**

- C TAF
- Care Plan
- Child in Need
- Grooming
- CSE CSE
- CCE
- C FGM
- © Domestic Violence
- Carteria Contraction Contractic Contr

#### **Sexual Harassment**

- C Sexting
- C Upskirting
- © Sexualised Behaviour
- C Language

#### SEND

- C School Support
- I:1 Support
- C EHCP
- C IEP
- Group Session
- C Observation

#### Medical

- C Medical Administered
- © Phone Call Home
- C Ambulance Phones
- C Allergies
- C Epi-Pen
- C Asthma
- C First Aid

#### **Contact with External Agency**

- C Telephone Call
- C Text Message
- C Email
- C Face to Face Conversation
- © Face to Face Meeting
- © Virtual Meeting

#### **Behaviour**

- C Against Staff
- G Against Peers
- C Positive Behaviour

#### **Friendship Related Issues**

# **CPOMS - Categories and Agencies**



# **CPOMS** <u>Agencies</u>

# Adding a new agency to CPOMS

New agencies can be added to CPOMS by an <u>Admin Key Holder</u> in school.

**Step 1** – Navigate to the **'Admin'** area, and click on the **'Agencies'** tab. Click on the **'New agency**' button, to the right-hand side of the page.

<b>CPOMS</b>	+ Add Incident	🕥 Remind M	e 🔌 Hide Names 🖵 Blank Screen 🔮 횑
СРОМS	Admin Overview Settings Imports Categories Agencies Calendar Users Transfers Groups Audits Integrations Bulk Management	Maps Add Student	Form Builder Data Destruction Policies
Planner	Agency name		New agency
Overview Settings Imports	Counsellor  Boctor  Educational Psychologist	Edit Edit Edit	Disable Disable Disable
Categories Agencies Calendar	Health Visitor Police Social Care/Services	Edit Edit Edit	Disable Disable Disable

Step 2 – Simply enter a Name for the new agency and click 'Save agency'.

New Agency	
Name	
	Save agency

On save, the agency will appear in your 'Agency Involved' list for selection when adding new incidents and actions.

# Changing an agency name

If you need to amend an agency name for any reason in CPOMS, i.e. a spelling error, this can be done by an <u>Admin Key Holder</u> in school.





Please do not change the meaning/ type of an agency when updating its name, as the new agency name will be transferred to all past incidents/ actions where this agency was tagged and also applied to any students marked as involved with the agency, past and present.

To amend an agency name, please navigate to the **'Admin'** area, and click on the **'Agencies'** tab. Next, click on **'Edit'** next to the name of the agency you would like to update. Simply over-type the current agency name, with the updated one, and scroll down to **'Save Agency'**.

# How to disable an agency

An <u>Admin Key Holder</u> in school can disable an agency in CPOMS. Simply navigate to the 'Admin' area, and click on the 'Agencies' tab. Click on 'Disable' next to the name of the agency you would like to remove from your agency involved list. You may also choose to 'Enable' the agency in the future if needed.

# **Example Agencies**

© ASD Team	© EWO	© Police
© Behaviour & Attendance Service	© GP / Paediatrician	© Probation
CAFCAS	C Health Visitor	© PRU
© CAMHS	C Hospital	© SALT
© Child Missing from Education	© Immigration	© School Nurse
Children's Centre	© LA Attendance & Inclusion Officer	© Shelter
© Children's Disability Team	C LAC/CLA Team	© Social Care/ Services
© Children's Hospital	${\ensuremath{\mathbb C}}$ Local Authority Designated Officer (LADO)	© Women's Aid
© Community Youth Team	© Looked After Children Team	© YOT
© Counselling	© MAST	© Young Carer Team
© Educational Psychologist	© Play Therapy	

For further assistance on any of the above please do not hesitate to contact us on

# 01756 797766 or support@cpoms.co.uk.

