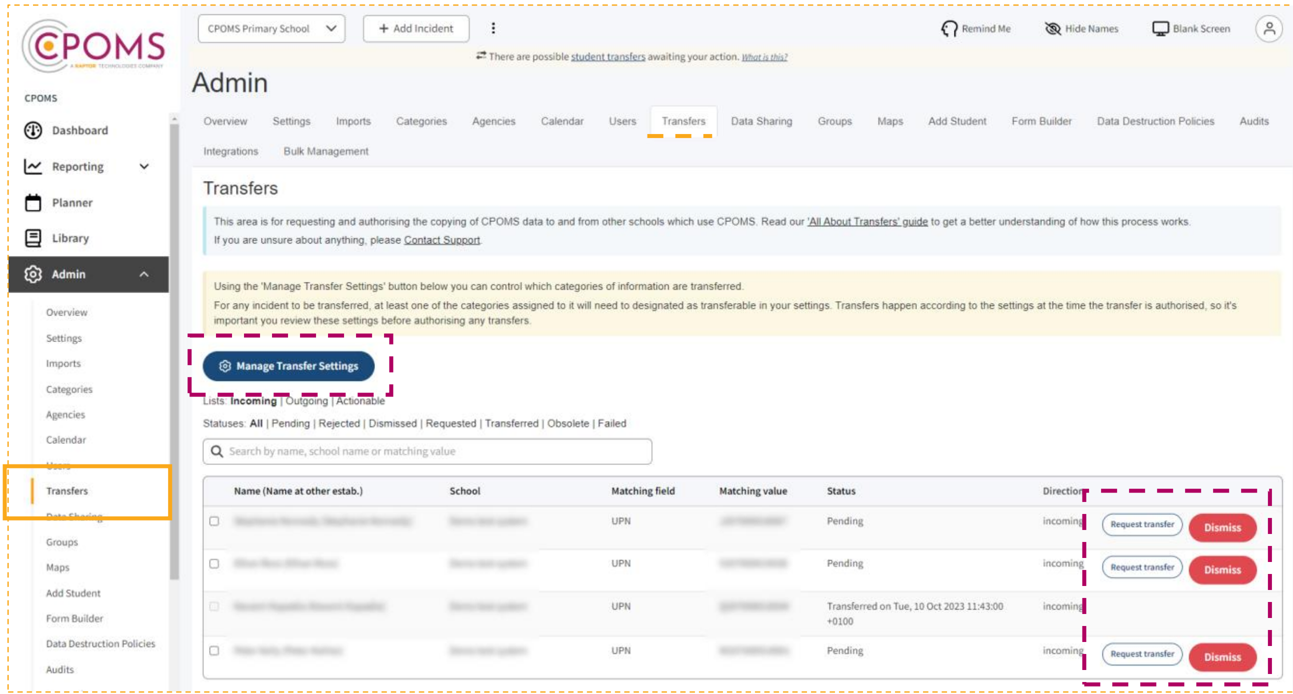
All About Transfers

The Transfer Process

If both the student's previous and new establishment uses CPOMS StudentSafe, once the student officially leaves or moves establishment and their UPN or ULN is added **identically** at both establishments *(within the MIS > CPOMS)*, the transfer between CPOMS will be detected automatically. Assuming the student has incidents and/or cases logged against them.

Once detected, the new establishment will receive a notification to **'Request'** the transfer at their side, within their CPOMS 'Admin' area > 'Transfers' tab.

On request, the previous establishment will receive a similar notification, this time to **'Authorise'** the transfer at their side, again within the 'Admin' area > 'Transfers' tab.



*__Before authorising any Transfers for students leaving your establishment,__ please ensure you have thoroughly reviewed and updated your **'Manage Transfer Settings'**, within the CPOMS **'Admin'** area > **'Transfers'** tab.*

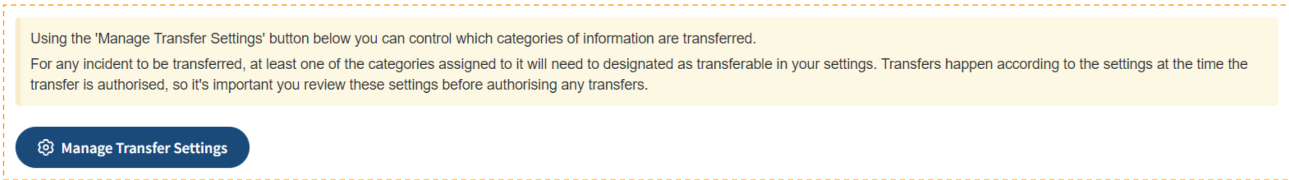
*By default, incident and action '**Categories'** are not selected, so it is crucial to specify which categories you wish to transfer to the receiving establishment.*

*If your setting has purchased the Premium Cases and Forms module, an additional **'Case Types'** tab will appear within your Manage Transfer Settings. Here, you can select the specific case types to be transferred. Please note, case types are not selected by default.*

CPOMS-1003-v2 UI

Once the previous establishment clicks to authorise, the new establishment will receive the student's incident history, cases and any attached documentation/ files within their document vault, based on the chosen 'Manage Transfer Settings'.

Transfer Preferences – Manage Transfer Settings



Each establishment must apply their own preferences so that only certain categories and case types are transferred. This can be set by a CPOMS **Admin Key Holder** within the establishment's **'Admin'** area > **'Transfers'** tab, by clicking on the **'** Manage Transfer Settings **'** button.

The 'Manage Transfer Settings' contains tabs for:- Categories and *Case Types *(*if you have purchased this module).*

- Tick the 'Categories' of incidents and actions you wish to transfer.
- Tick the 'Case Types' you wish to transfer.

When you are ready click **'Update'** to apply these settings.

Please note, when you add new categories or case types to the system, you will need to update your 'Manage Transfer Settings' to include the new categories or case types in future transfers, if desired.

> *If you do not tick any categories or case types within your **'Manage Transfer Settings'** section, and click to authorise a transfer in CPOMS, the receiving establishment will not receive any incidents or cases relating to the student.*
>
> *Once a transfer has been sent/ authorised it cannot be re-tracted or re-sent.*

What information is transferred via CPOMS?

Once a transfer has been requested by the student's new establishment and authorised by their previous establishment, the student's incident history, cases, plus any associated files and documentation within their document vault will be sent across to the new establishment's CPOMS system. *Based on the categories and case types chosen in the previous establishment's 'Manage Transfer Settings'.*

If a case type is selected to transfer, all associated incidents to the case will automatically transfer to the new school, regardless of their category. However, any attached incidents created for a different student will not transfer. Cases are transferred as a read-only copy, even if the school has not purchased Premium Cases and Forms.

The name of the staff member who logged the incident or case, to the left of the incident text, will change to the previous establishment's name (i.e. the school name who authorised the transfer).

Any linked student names, to the left of the incident text, will be hidden.

The incident and case text will send on (transfer) exactly as it is written.

Before authorising a transfer, we would always suggest that you double check the students 'Incidents tab, 'Cases' tab and document vault to ensure that all required names are removed from the text. If you do then find a name that you need to alter you can choose to 'Edit' the text of the incident/ case to use initials for any names or use a different term such as mum/ dad/ brother/ sister, for example. If this is required by your internal procedures.

Once you are happy with the incident and case text and documentation you may click to authorise the transfer.

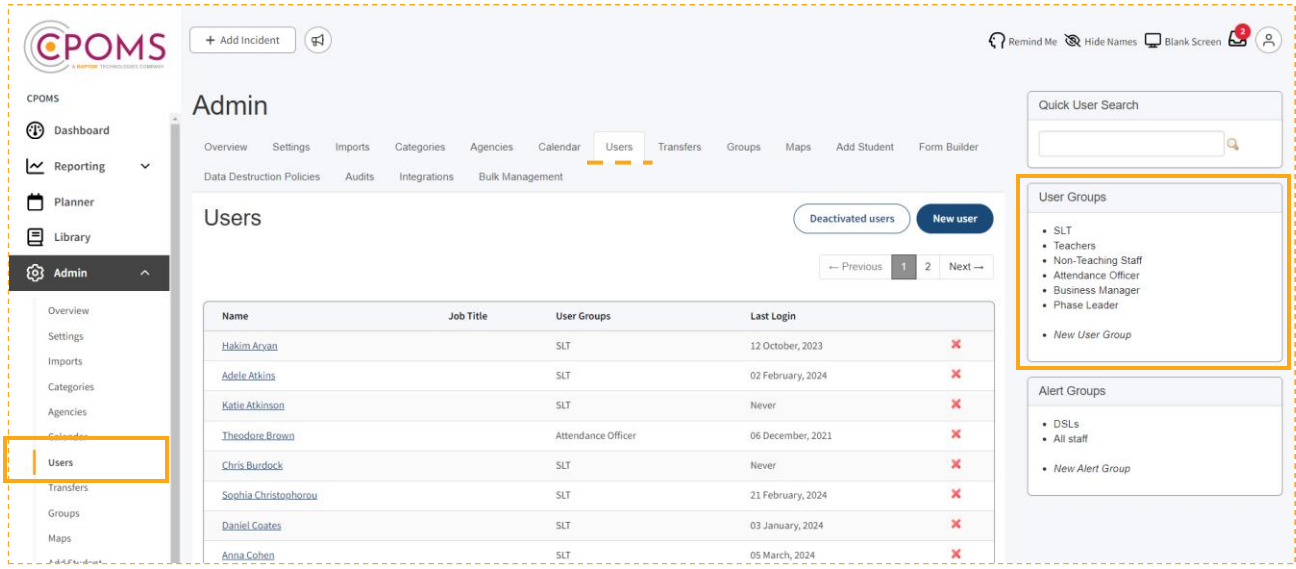
How to access the transfer

Once the transfer status changes to 'Transferred', the new establishment will receive the student's transfer information.

The establishment's/ student's previous incident categories are brought across to CPOMS also, under a main category of 'Legacy', with sub-categories of the previous establishment's category names.

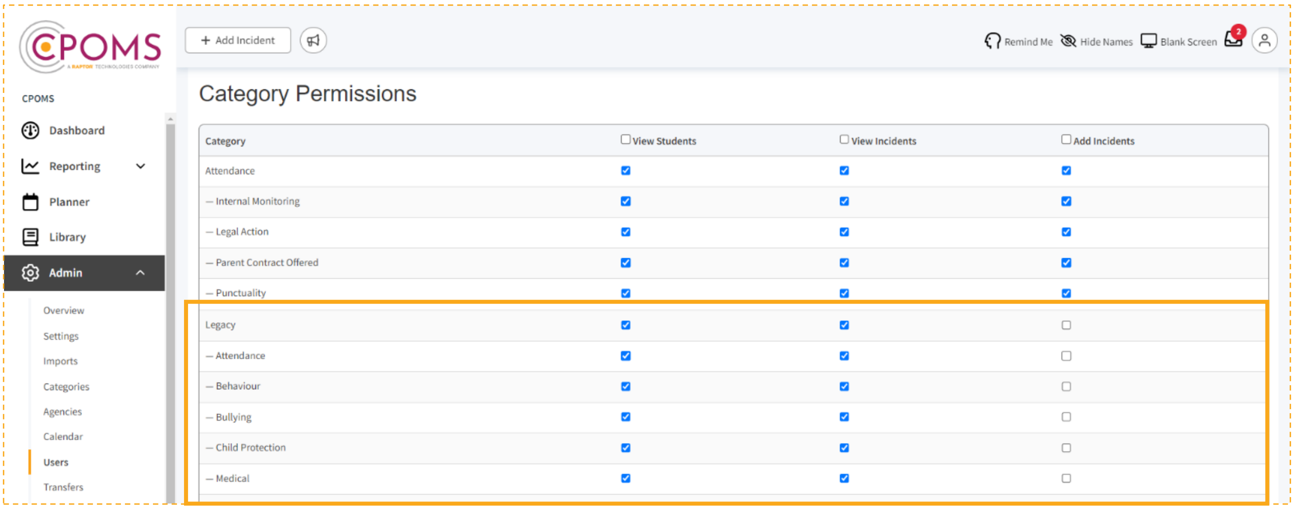
The Legacy categories are automatically deactivated, and the permissions are set to blank, to ensure that no new incidents can be logged against them and that only the correct level of staff at the new establishment can access the transferred information.

Therefore, in order to gain access to transferred incidents, a CPOMS **Admin Key Holder** needs to set the permissions for each Legacy category and any sub-categories, within the **'Admin'** area > **'Users'** tab, by clicking into the top-level User Group name, *i.e. SLT*, to the right-hand side of this page.


CPOMS
Add Incident
Remind Me
Hide Names
Blank Screen
CPOMS
Dashboard
Reporting
Planner
Library
Admin
Overview
Settings
Imports
Categories
Agencies
Users
Transfers
Groups
Maps
Admin
Overview
Settings
Imports
Categories
Agencies
Calendar
Users
Transfers
Groups
Maps
Add Student
Form Builder
Data Destruction Policies
Audits
Integrations
Bulk Management
Users
Deactivated users
New user
← Previous
1
2
Next →
Name
Job Title
User Groups
Last Login
Hakim Aryan
SLT
12 October, 2023
Adele Atkins
SLT
02 February, 2024
Katie Atkinson
SLT
Never
Theodore Brown
Attendance Officer
06 December, 2021
Chris Burdock
SLT
Never
Sophia Christophorou
SLT
21 February, 2024
Daniel Coates
SLT
03 January, 2024
Anna Cohen
SLT
05 March, 2024
Quick User Search
User Groups
SLT
Teachers
Non-Teaching Staff
Attendance Officer
Business Manager
Phase Leader
New User Group
Alert Groups
DSLs
All staff
New Alert Group

Within the User Group **‘Category Permissions’** please tick **'View Students'** and **'View Incidents'** against each Legacy category and any sub-categories, ensuring you **‘Save Group’** once ticked.

Please leave the **'Add Incidents'** column **un-ticked** so no new incidents can be logged against them.



*Once category permissions are enabled, transferred incidents will appear in the student’s profile > **‘Incidents’** tab, organised by date.*

*Any associated files will be available in the student’s profile > **‘Document Vault’** tab.*

*Transferred Cases will be available in the student’s profile **‘Cases’** tab, as a read-only copy.*

A transfer is not showing for me to request/ authorise?

For a transfer to be detected in CPOMS:-

- **There must be a matching value on both CPOMS systems.**

  CPOMS currently supports UPNs and ULNs, so either of these values must be the same on both CPOMS systems. Please ensure this by looking at the student's CPOMS record > ‘Overview’ tab.

- **The previous establishment must have the student archived in their CPOMS system.**

  CPOMS student archiving will take place once the MIS imports detect that the student has left the previous establishment. To check this in CPOMS, simply search for the child, choosing to ‘Include archived students’.

- **The receiving establishment must have the student active in their CPOMS.**

  CPOMS will import the student from the MIS once their start date is reached. Simply search for the child within CPOMS, to ensure they have imported (with a matching value as above).

- **The UPN must not be a temporary UPN.**

CPOMS will not detect a transfer using a temporary UPN as the matching value. Temporary UPNs usually have a letter at the end, typically an 'A'.

- **The previous establishment must have incidents and/or documents related to the student in their CPOMS.**

  CPOMS student transfers do not detect if there is no information to transfer. The previous establishment can take a glance at the student's CPOMS record to see if there is any information present.

Please note, the new establishment must firstly request the transfer to start the process.

Transfer Status

When a transfer appears within the Admin > Transfers section, it will have a 'Status' so you can easily see which stage it is at in the transfer process:-

Status	Definition
Pending	The transfer has been detected on both establishment's CPOMS systems. Ready for 'New' ('Incoming') establishment to click 'Request'.
Rejected	'New' establishment requested transfer information, 'Previous' establishment chose to 'Reject' the request. Check with the other establishment for reason why it was rejected.
Dismissed	'New' establishment does not want to receive the transfer information. This may be because the child did not eventually go to that establishment.
Requested	Awaiting 'Previous' ('Outgoing') establishment to click 'Authorise'.
Transferred	The transfer has been requested and authorised by both establishments, and the information has been transferred to the 'New' establishment's CPOMS system. Please see **page 3, How to access the transfer information** if you are unsure how to view it.
Obsolete	The student is archived on both 'Previous' and 'New' establishment's CPOMS system. No action available.

Transfer Direction

Each transfer will also have a 'Direction':-

Direction	Definition
Incoming	The establishment with the direction 'Incoming' will receive the transfer information. They are the child's 'New' establishment.

Outgoing	The establishment with the direction 'Outgoing' will transfer their CPOMS information, *for that student,* to the 'New' establishment. They are the child's 'Previous' establishment.

The new setting does not use CPOMS?

If a student's new setting does not use CPOMS, you can generate a full student report in CPOMS StudentSafe to either print a hard copy or send electronically.

If you use Premium Cases and Forms and wish to include cases in the report, you can also print them or save them electronically. Instructions for this can be found below.

Run a full student report

- Access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.
- Within the student's profile, click on the **'Student Report'** tab.
- Under **'Include in report'** tick to include **'Incidents'** in addition.
- In the additional **'Filter Incident'** options that now appear, you may wish to tick **'Include Linked Incidents'** to ensure you receive any incidents the student has been linked in to also. You may also wish to choose to **Hide Student and/ or Staff Names** in the report.
- *For all records please ignore the further filter options, **or** you may apply specific dates or select certain categories within the 'Filter incidents' options.*
- Scroll down to the **'Report format'** and amend this to **'PDF (print view)'.**
- If required enter a **'PDF password'** to password protect the report, and **'Generate Report'.**

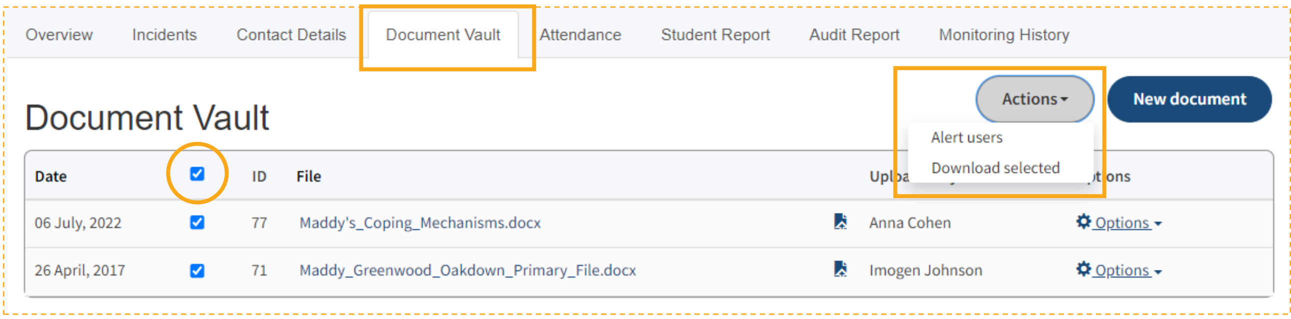
This will then generate a PDF copy of the student's incidents which you can then print or save electronically.

How do I download the student's documents/ files?

Once you have run the student report, you may wish to download the student's documents/ files as well.

To do this, access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name. Within their profile, click on the **'Document Vault'** tab.

To download all, click on the very top tick box *(In between the titles 'Date' and 'ID')* which will select all, *or if you do not wish to download all simply tick the documents you require one by one*. A new button for **'Actions'** will now appear to the right-hand side of the screen. Click on this option and **'Download selected'**.



This will create a zip file containing all of the selected documents. The zip file usually appears to the bottom left of your internet browser for quick access and is usually saved in the 'Downloads' folder of the machine you are on (depending on your individual machine settings).

Please note, if the student has multiple pages of documents, you will need to follow the above instructions on each individual page.

Hiding Names in a Student Report

When you are running the report, in the 'Incident Filters' you will find the option to 'Hide' either Student Names or Staff Names (or both).

When you select to hide Student Names, you can choose to hide 'All' names, or 'Just Linked' names only. If you choose to hide 'All' names, the name of the student whom the report is written about will be hidden, as well as any linked students. If you choose to hide 'Just Linked' names, the name of the student whom the report is written about will not be hidden.

*Please note, the system is only able to hide the first name, surname (or both) of the student for whom the report is written and any other students who are linked into the incident, as long as it is spelt identically to how it is registered in your MIS. It will **not** hide shortened/ mis-spelled versions of the names if used, or the names of any other students who are not linked into the incident.*

When you select to hide Staff Names, the name of the staff member who wrote the report will be hidden to the left-hand side of each incident, as well as the name of the staff member it is 'Assigned to'.

We would always suggest that before you print out a report, that you first run it in the report format 'Enquiry View' to check that all the required names are removed from the text. Once you are happy with it, you can then run it as a 'PDF (Print View)'. If you then find a name in a report that you wish to hide, you can either link in the required student(s) or edit the text of the incident/ action to use initials instead, *for any names that cannot be linked*, and re-run the report. If this is required by your internal procedures.

If there is a particular name or initials you wish to redact from a report as a one off, you can enter this in the 'Redact words or phrases' option before generating the report, which will redact it from the report you are generating. Simply type in the name/ initials and select it to add, you may add more than one word/ phrase.

Print or download a Case

If you would like to print or download a copy of a Case for transfer purposes:-

- Access the student's profile via their class list, or using the 'Quick Student Search' option and click on their name, into their profile.
- Within the student's profile, click on the **'Cases'** tab.
- Locate the case you wish to print/download and click on the 'Go to case' option (at the bottom of its box).
- Within the case, along the top, click on **'Options'** > **'Print view'**.
- To the top-right of the print view, you may then choose to 'Print' or 'Download' to save a copy electronically.

You will need to follow the above instructions for each case you wish to print/download.

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

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

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