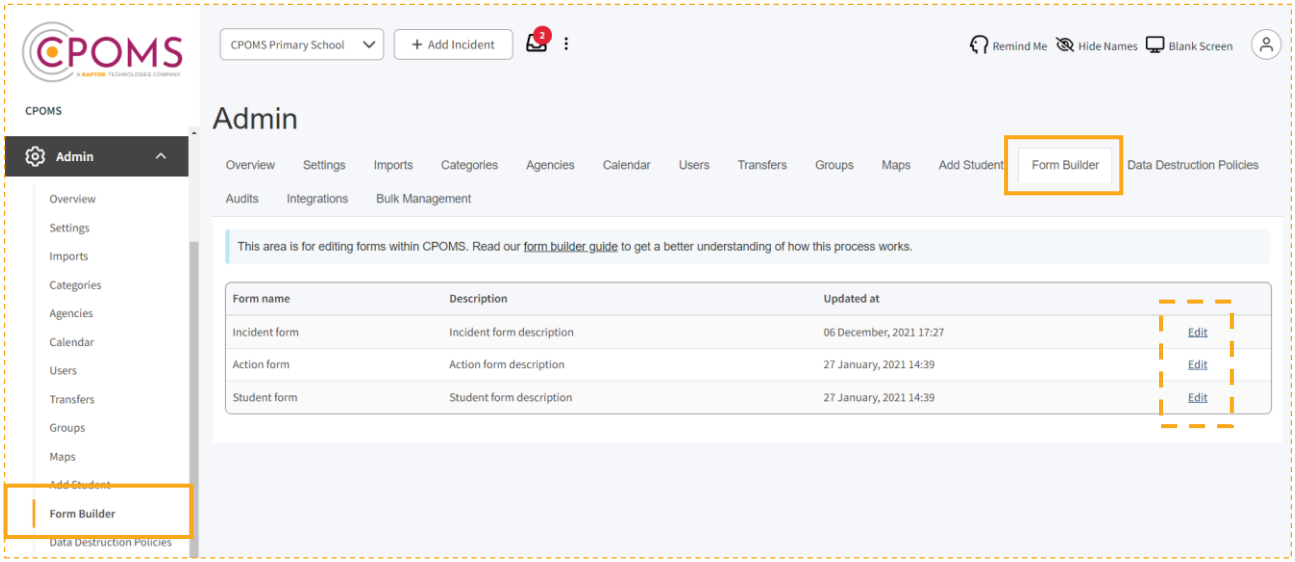
CPOMS – Form Builder

Custom Fields can be added to CPOMS by a CPOMS **Admin Key Holder** to your:- **Incident, Action** and **Student** forms.

This may be an additional drop-down list for the 'Location' of an incident *i.e. Playground, Classroom, Toilets, Out of School*, or a free text box to add a 'Summary' of an incident or action taken.

Using the Form Builder, you can also adjust the order of the form itself and add additional advice messages for staff *i.e. 'Please include as much information as possible'* for example.

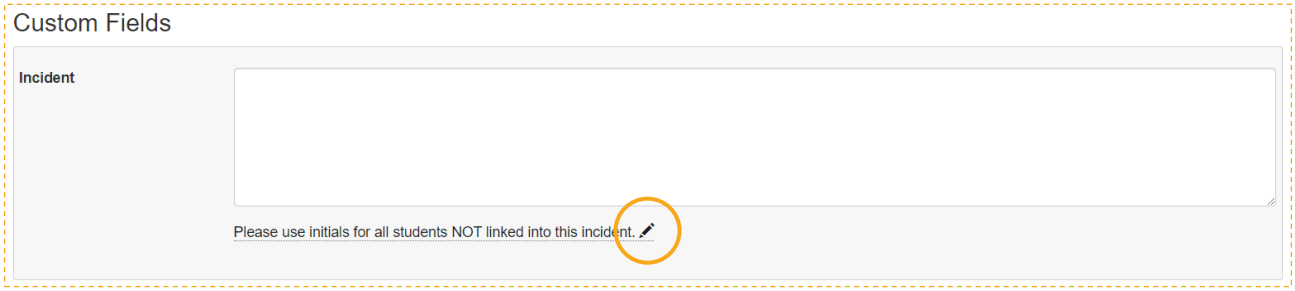
Step 1: To amend the order of a form or create a new custom field, please navigate to the **'Admin'** area > **'Form Builder'** tab and click **'Edit'** next to the name of the form you would like to amend/ add to.



Here you can now drag and drop the form fields into your preferred order.

If you click on the pencil icon beneath any field you can add an additional 'Advice Message' for staff, i.e.

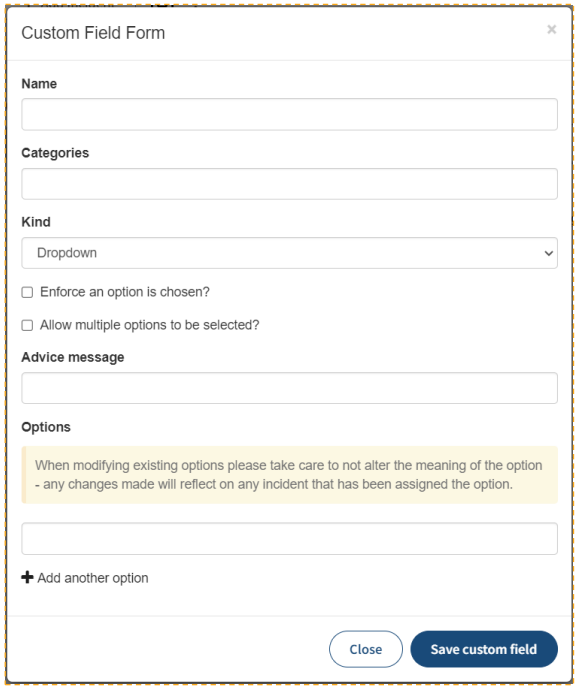
- *Please use initials for any students not linked into this incident.*
- *Please always alert the 'SLT' team for Safeguarding incidents.*



© CPOMS Systems Limited 2024

To add an additional Custom Field to the form, scroll down to the very bottom of the page and click on the **'+ New custom field'** button, to the right-hand side.

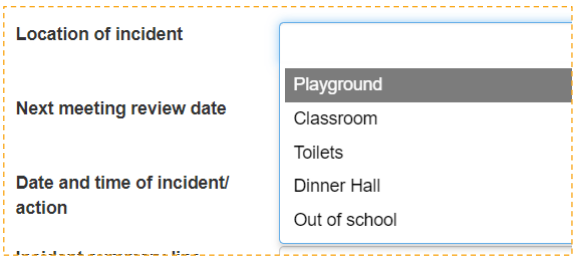
Step 2: Complete the 'Custom Field Form'



- Firstly enter the '**Name**' of your new custom field
- Under **'Categories'** you can choose which types of incidents you would like this field to appear for, i.e. Medical, Behaviour only. The field will then appear once this category(s) is chosen on the new incident/ action form. Please leave this field blank if you would like the custom field to appear for all incident types.
- Next choose the **'Kind'** of custom field from the available options, which are:-

Dropdown – to create a dropdown list of pre-set options to choose from

Example, dropdown list of Location of an incident/ action



© CPOMS Systems Limited 2024

Text – to add an additional line for free text

Example, to enter a Social Worker name on a student's overview

Multiline text – to add an additional text box for more free text

Example, free text box for a summary of incident/ action

Date/Time – to add an additional date and time field

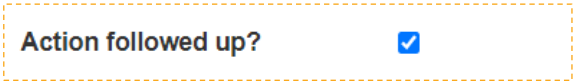
Example, to input the date and time the incident/ action took place

Date – to add an additional date field

Example, to enter the date of the next review meeting

Checkbox – to add a tick-box

Example – 'Action followed up?'

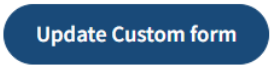


Radio button - to create a list of pre-set options to choose from

Example - 'Parent/Carer informed?'

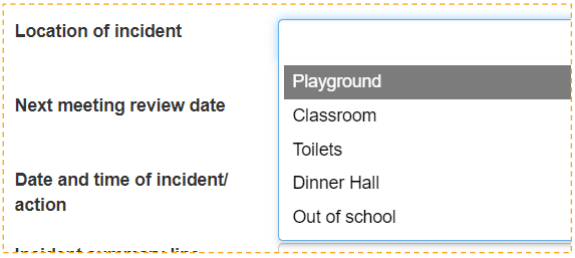
- **If you choose Dropdown** you will have the following additional check boxes:-
  - Enforce an option is chosen?
  - Allow multiple options to be selected?
- **For Dropdown and Radio Buttons** enter your 'Options' next – these will be the items you would like to display in your list.
  - You can add further options by clicking **'+ Add another option'**.
- For all new custom fields, you can also add an 'Advice message' for staff to read. This helps to ensure the field is completed correctly. The advice message will appear directly below the field on the chosen form.
- Once you have completed the form click **'Save Custom Field'**.

Step 3: IMPORTANT:- Once you have updated the form, scroll down to the bottom of the page again and click **'Update Custom form'** to save your changes. The custom field(s) will then be created and it will appear within the chosen form for staff to see/ select.



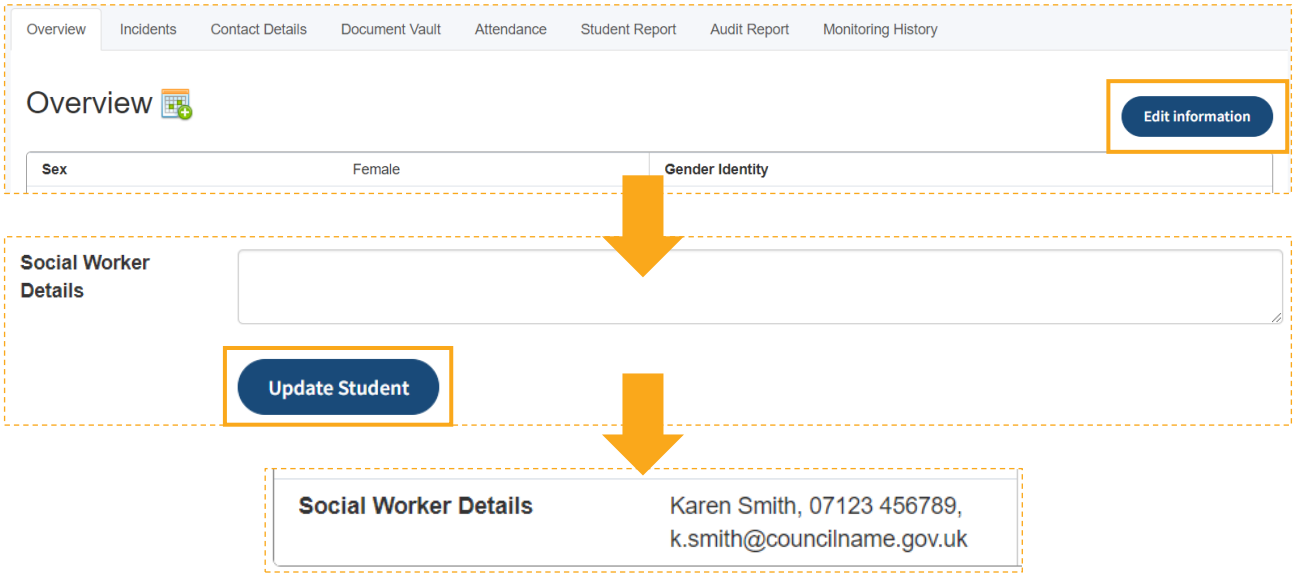
© CPOMS Systems Limited 2024

Example custom field on Add Incident form



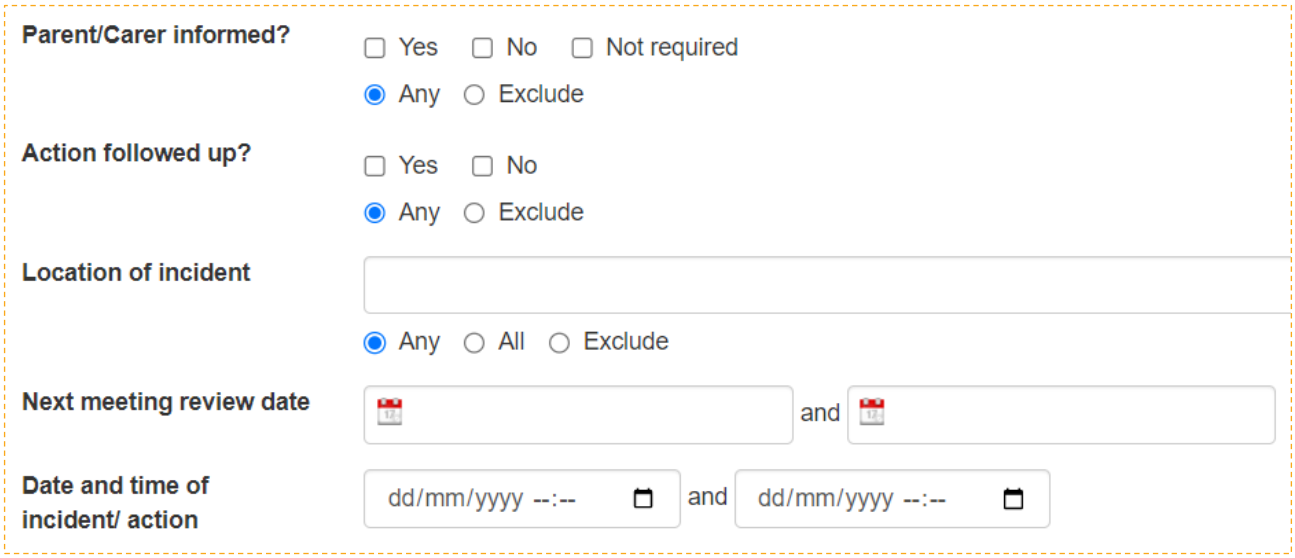
Example custom field on Student form

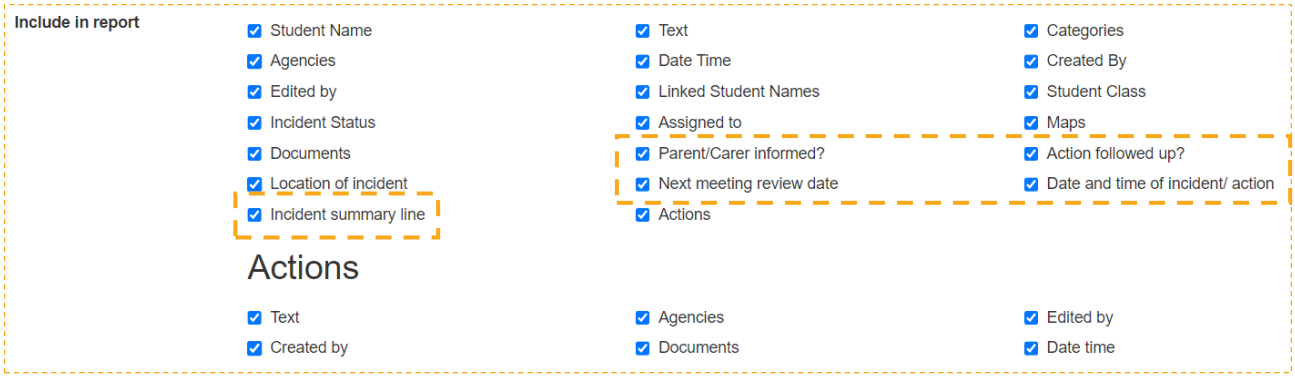
If added to the **Student Form**, the field will be available to use within each student's profile > **'Overview'** tab, by clicking the **'Edit Information'** button.



© CPOMS Systems Limited 2024

You may also **report on** Custom fields, they will appear for selection within the Filter by Student/ Incident options, or 'Include in report' checkboxes - depending on where the custom field was added to.





Managing your Custom Fields

You can view and edit your existing custom fields within the **'Admin'** area > **'Form Builder'** tab, by clicking **'Edit'** next to the relevant form name.

If you hover your mouse over a particular custom field the follow icons will appear *(to the right-hand side of the field)* to allow you to amend , or **delete** the custom field.

Please be aware, if you choose to delete a custom field which has been in use, it will delete the custom field and all data input into this field in previous entries. **This is irreversible.**

© CPOMS Systems Limited 2024

For further assistance on any of the above please do not hesitate to contact us on **01756 797766** or **support@cpoms.co.uk**.

www.cpoms.co.uk

© CPOMS Systems Limited 2024