

CPOMS – Form Builder

Custom Fields can be added to CPOMS by a CPOMS <u>Admin Key Holder</u> 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.

CPOMS	CPOMS Primary School 🗸 🕂	dd Incident 🤔 🗄	🎧 Remind Me ଷ	Hide Names 🖵 Blank Screen 🤇 🕱
CPOMS	Admin Overview Settings Imports	Categories Agencies Calendar Us	ers Transfers Groups Maps Add Student Form Bu	ilder Data Destruction Policies
Overview Settings Imports	Audits Integrations Bulk Manag	gement POMS. Read our <u>form builder guide</u> to get a better	r understanding of how this process works.	
Categories Agencies	Form name	Description	Updated at	
Calendar Users	Incident form Action form	Incident form description Action form description	06 December, 2021 17:27 27 January, 2021 14:39	Edit Edit
Transfers Groups	Student form	Student form description	27 January, 2021 14:39	Edit
Maps Add Student				
Form Builder Data Destruction Policies				

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.

ſ	Custom Fields	
	Incident	
		Please use initials for all students NOT linked into this incident.
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Page 1 of 6 © CPOMS Systems Limited 2024 CPOMS-1012-v1 UI



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.

Update Custom form	+ New custom field

Step 2: Complete the 'Custom Field Form'

Custom	Field Form
Name	
Categorie	s
Kind	
Dropdov	wn
Options	issadje
When m - any ch	odifying existing options please take care to not alter the meaning of the option anges made will reflect on any incident that has been assigned the option.
∔ Add and	ther option

- © 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:-

	Location of incident	
Dropdown – to create a dropdown list of		Playground
pre-set options to choose from	Next meeting review date	Classroom
Example, dropdown list of Location of an		Toilets
incident/ action	Date and time of incident/	Dinner Hall
	action	Out of school



Example, to enter a Social Worker name on a student's overview	Social Worker Details Karen Smith, 07123 456789, k.smith@councilname.gov.uk			
Multiline text – to add an additional text box for more free text	Incident summary line			
Example, free text box for a summary of incident/ action				
Date/Time – to add an additional date and				
Example, to input the date and time the incident/ action took place	Date and time of incident/ action			
Date – to add an additional date field				
Example, to enter the date of the next review meeting	Next meeting review date			
Checkbox – to add a tick-box	Action followed up?			
Example – 'Action followed up?'				
Radio button - to create a list of pre-set options to choose from	Parent/Carer informed? O Yes O No O Not requir			
Example - 'Parent/Carer informed?'				

- yea encode propuorin you win nave the followi
 - 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.

Update Custom form

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Example custom field on Add Incident form

Location of incident	
	Playground
Next meeting review date	Classroom
	Toilets
Date and time of incident/	Dinner Hall
action	Out of school
- Jue idente en 1999	

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.

Overview	Incidents	Contact Details	Document Vault	Attendance	Student Report	Audit Report	Monitoring History				
Overv	view 眠								Edit info	ormation]
Sex			Female		Gen	der Identity			 		
Social W Details	orker	Updat	e Student						 	,	
		Sc	ocial Worker E	Details	Ka k.s	aren Smith, smith@cou	07123 45678 ncilname.gov	39, .uk			



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.

Parent/Carer informed?	🗌 Yes 🗌 No 🗌) Not required	
	Any		
Action followed up?	🗆 Yes 🗌 No		
	Any O Exclude		
Location of incident			
	● Any 🔿 All 🔿 I	Exclude	
Next meeting review date	12	and	
Date and time of incident/ action	dd/mm/yyyy:	and dd/mm/yyyy:	
Include in report Stude	nt Name	Text	Categories
Ageno	ies	Date Time	Created By
Edited	by	Linked Student Names	Student Class
Incide	nt Status	Assigned to	Action followed up 2
	nemis	Parent/Carer Informed? Next meeting review date	 Action followed up? Date and time of incident/ action
Incide	nt summary line	Actions	
Actio	ons		
Text		Agencies	Edited by
Creat	d by	Documents	Date time

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



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



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

01756 797766 or support@cpoms.co.uk.

