

Custom Field for 'People Involved' when using initials in incident text

If your LA/ Safeguarding Advisor recommends the use of initials in incident/ action text, it can be useful to add a custom field for 'People Involved' to use as a key.

i.e. *SM = Sue Maxfield*
LD = Laura Denby

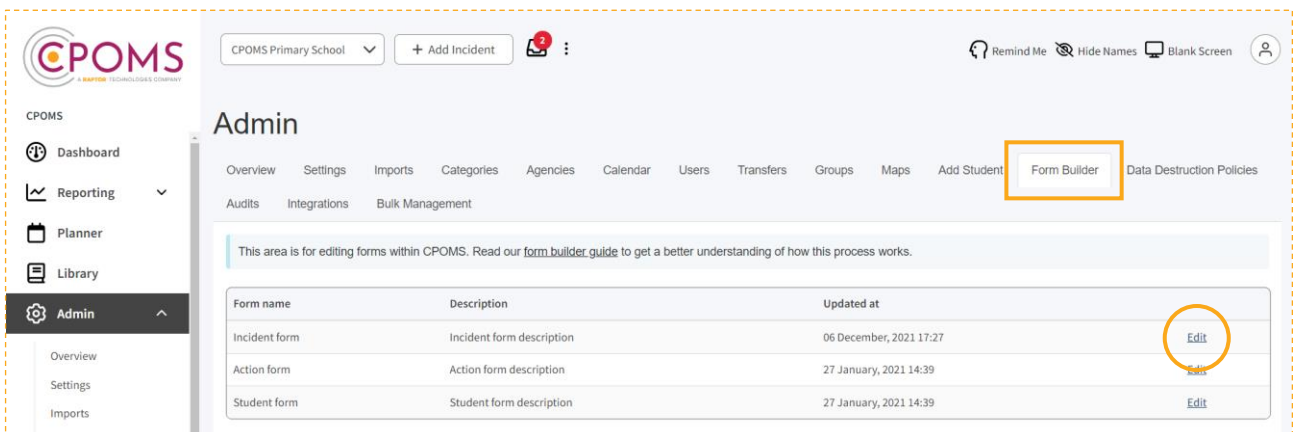
Or

Pupil A = Sue Maxfield
Pupil B = Laura Denby

If you then need to refer back to the incident in the future, you can cross check the initials against the key.

As the 'People Involved' is a custom field you can choose to not include it when running reports, i.e. for a Subject Access Request.

To create a 'People Involved' custom field, please go to '**Admin**' and select the '**Form Builder**' tab.



Form name	Description	Updated at	
Incident form	Incident form description	06 December, 2021 17:27	Edit
Action form	Action form description	27 January, 2021 14:39	Edit
Student form	Student form description	27 January, 2021 14:39	Edit

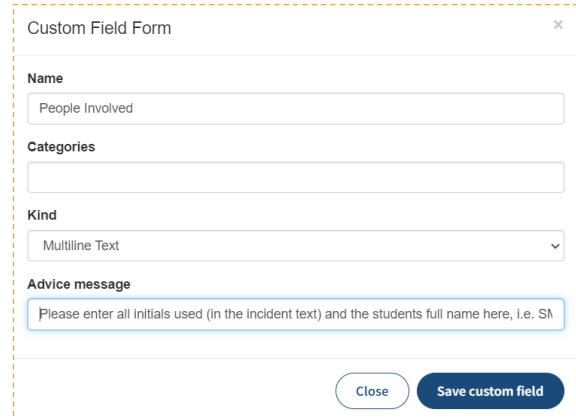
Click '**Edit**' next to the '**Incident form**'.

Scroll down to the very bottom of the page and click on the '**+ New custom field**' button, to the right-hand side.



Next, complete the 'Custom Field Form':-

- ③ **Name** - enter a name for the custom field, *i.e. People Involved.*
- ③ **Categories** – leave blank, unless you want this field to appear for certain categories only.
- ③ **Kind** – choose 'Multiline Text'.
- ③ **Advice message** - enter an advice message of your choice to guide staff when completing this field *i.e. Please enter all initials used (in the incident text) and the students full name here, i.e. SM = Sue Maxfield.*



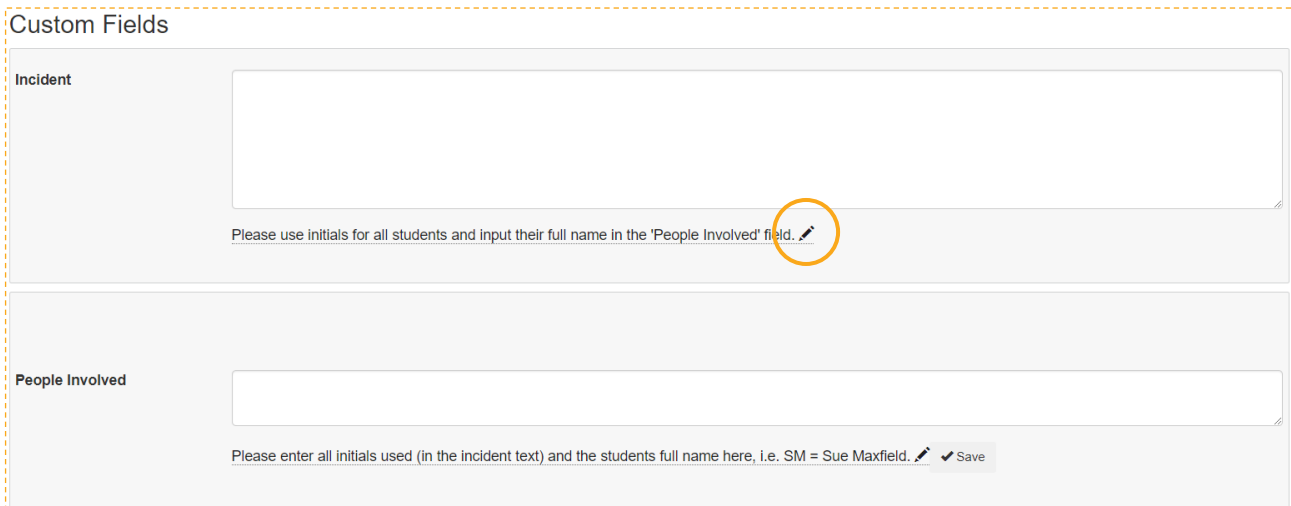
- ③ And click '**Save custom field**'.

If you would prefer for the field to appear elsewhere on the incident form *i.e. directly beneath the incident text box*, you can drag and drop the field to your preferred place.

You may also wish to add an additional 'Advice message' beneath the 'Incident' field for something along the lines of:- *Please use initials for all students and input their full name in the 'People Involved' field.*



Click on the small pencil icon beneath the 'Incident' field to add one.



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.

Update Custom form

The field and your advice notes will now appear on the 'Add Incident' form for all staff.

Incident

Please use initials for all students and input their full name in the 'People Involved' field.

People Involved

Please enter all initials used (in the incident text) and the students full name here, i.e. SM = Sue Maxfield.

When running reports on Incidents, you can then tick to include, or un-tick to not include, the 'People Involved' field/ key depending on the type of report you are running.

Include in report

<input checked="" type="checkbox"/> Student Name	<input checked="" type="checkbox"/> Text	<input checked="" type="checkbox"/> Categories
<input checked="" type="checkbox"/> Agencies	<input checked="" type="checkbox"/> Date Time	<input checked="" type="checkbox"/> Created By
<input checked="" type="checkbox"/> Edited by	<input checked="" type="checkbox"/> Linked Student Names	<input checked="" type="checkbox"/> Student Class
<input checked="" type="checkbox"/> Incident Status	<input checked="" type="checkbox"/> Assigned to	<input checked="" type="checkbox"/> Maps
<input checked="" type="checkbox"/> Documents	<input checked="" type="checkbox"/> People Involved	<input type="checkbox"/> Parent/Carer informed?

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