CPOMS System User Guide

AWARDS 2018 WINNER

A RAPTOR COMPANY

THE QUEEN'S AWARDS FOR ENTERPRISE: INNOVATION 2020

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1 Non Key User - Restricted System Access

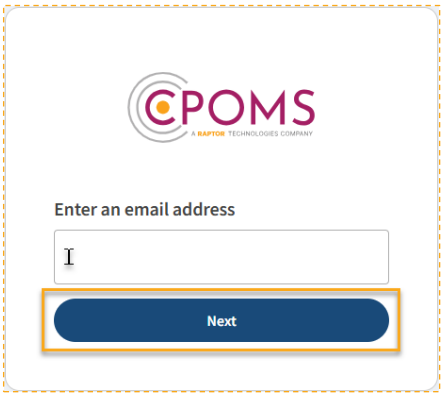
1.1 Using CPOMS for the first time

Firstly every user needs to set their own password.

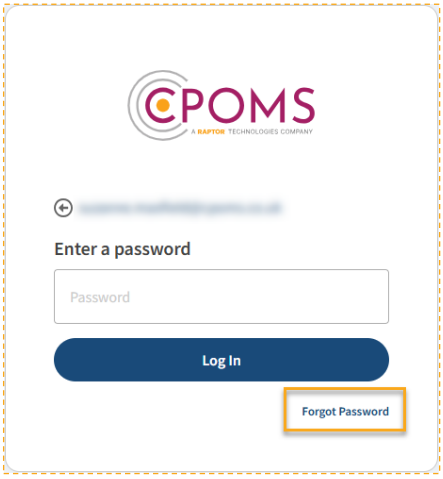
To ensure that all users change their password to something that is personal and secure, we do not provide you with a password to begin with.

To create your first password please **visit your school's CPOMS URL.**

Enter the email address which is associated with your CPOMS account and click **'Next'.**



Click on the **'Forgot Password'** option *(beneath the 'Log In' button).*



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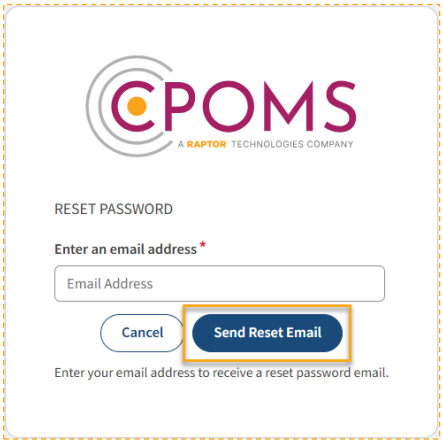
When prompted, input your email address and click **'Send Reset Email'**.



This will then send you a unique hyperlink, *to that email address*, which will enable you to create your first CPOMS password.

*Please note, the reset password link **expires at midnight** on the day it was sent, so should be generated on the day you are going to log in to CPOMS.*

*Therefore, when starting to use CPOMS, we recommend that you **share your CPOMS URL (web address) with users** and advise them to **click on the 'Forgot Password' option themselves**, to avoid the link expiring.*

*If you receive the error message **'An account with these details cannot be found'** when trying to reset your password, then it is likely that we have a different email address assigned to your account, or that your account has not yet been created.*

*In this case, please contact your CPOMS Administrator in school to check this, within the CPOMS **'Admin'** area > **'Users'** tab.*

Once you have created your first password, go back to the log in page and enter your email address, password and click the **'Log In'** button.

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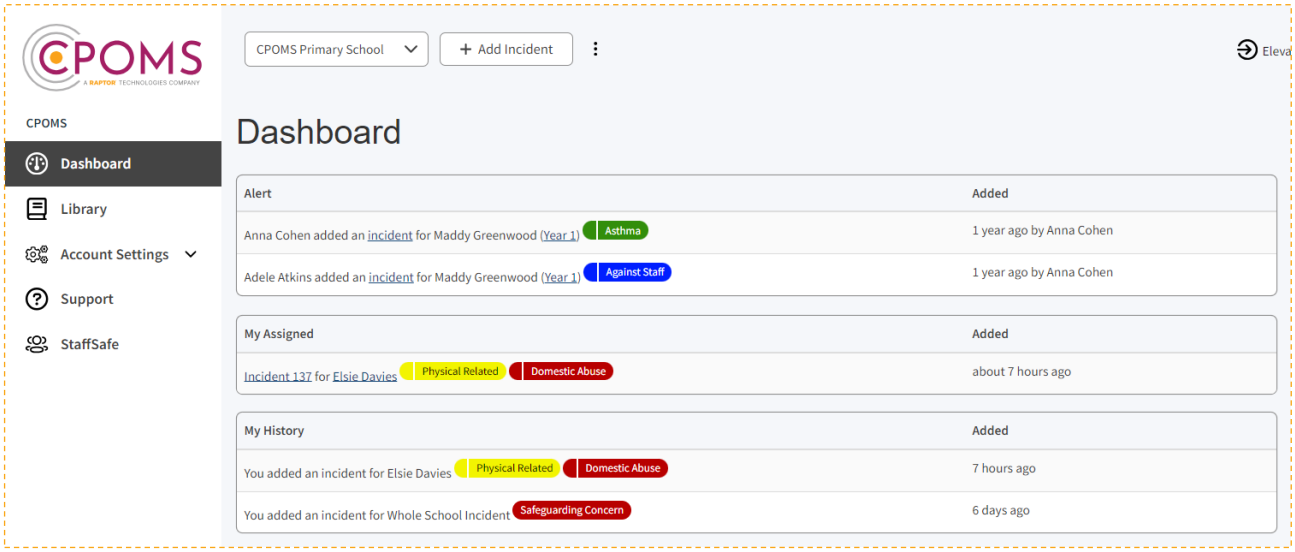
1.2 Restricted Access Dashboard

Once you are logged in to CPOMS, you will see an **'Alert'** and **'My History'** section.

If you have been alerted to anything at all within CPOMS it will display within your **'Alert'** section to view.

The **'My History'** section will list any incidents or actions that you have added in the last 7 days, for your information.



2 Viewing an Incident

If you have been sent any alerts at all, you will also receive an email to your school email address *(or the one which we have been given)* to make you aware of the fact that you have been sent an alert by a member of staff in school.

The email will tell you who has created the alert and which category it falls under but no other information. It will then give you a link to your CPOMS log in page to view the content in full.

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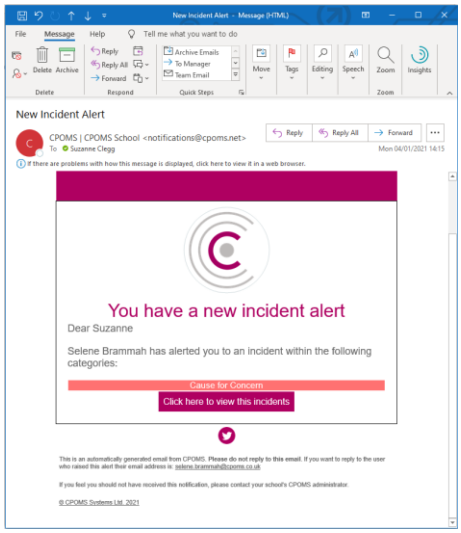
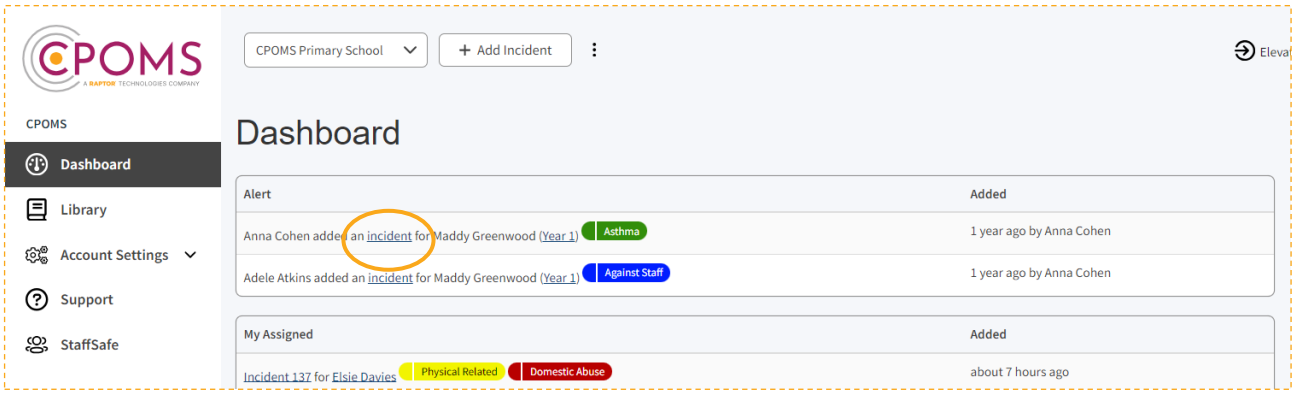


Once logged into the dashboard you will see your list of alerts. It will again tell you which member of staff has alerted you, which student the alert is about, the category(s) the incident falls under and when the incident alert was created.

If you now click on the word '**Incident'** you will be taken directly to view the incident.



Once you have read and dealt with the incident, you can choose to **'Add Action'** below the content, to add in the detail of any action you have taken, or what you would now like a colleague to follow up.

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Once you have added your action you may mark the incident as read to acknowledge that you have seen the incident and understand the content.

N.B Please note as you do not have key access, once you have marked the incident as read, the alert will disappear from your alerts dashboard and you will not be able to read it again. Therefore if you are required to add any further actions make sure to do this before you select the 'mark as read'.

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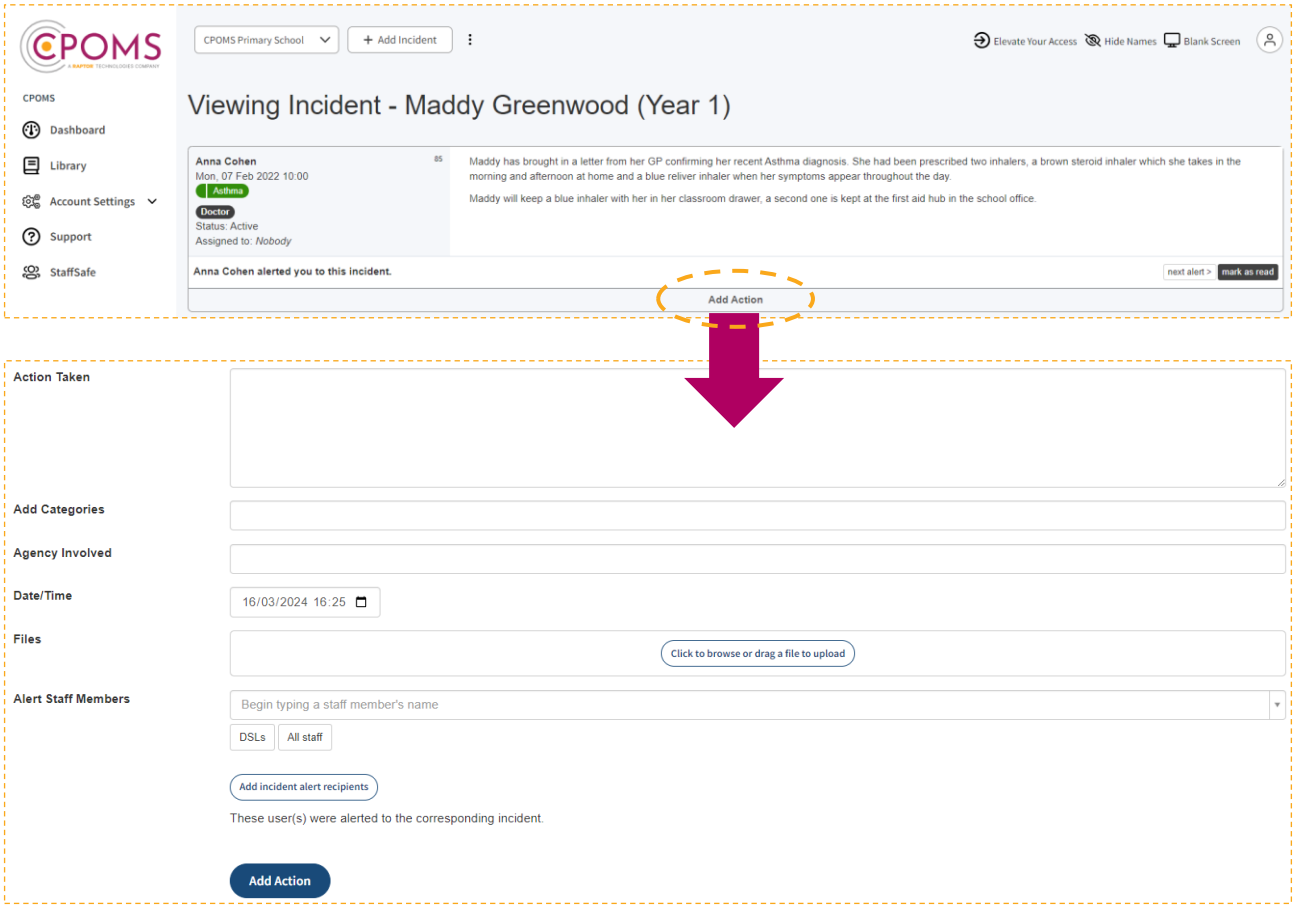
3 Adding an Action

Once you have read an alert, you can then log an action. This is very similar to incident logging and you can choose to alert other staff in the same manner. You can then make sure that there is a clear trail of what has been done, by whom and when. This ensures that everyone alerted has an up-to-date knowledge of what is happening with that student/ incident.



Action Taken

Firstly fill in the free text box with all of the information needed about the action taken. This could be a referral made, telephone call or meeting arranged, for example.

Add Categories

If required, you can add additional categories to the action which will be displayed against the original incident.

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Add action to linked students

If you would like the action to be copied to the linked students profile, click on the tick box to 'Add action to linked students' next and 'Share documents?' if necessary.

Agency Involved

You can also add any agency names to the action to make others aware of which agencies are involved with this action/ pupil.

Date/ Time

Select the date and time you wish to record, if it is different to the current.

Files

If you would like to attach a file/ document to support the incident *e.g. a social services letter, email, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add or drag a file from one of your folders into the area to upload.

Alert Staff Members

Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

Or you may click **'Add incident alert recipients'** to alert the same staff members who were alerted to the original incident.

Once all of the above has been done, you must select the **'Add Action'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added action.

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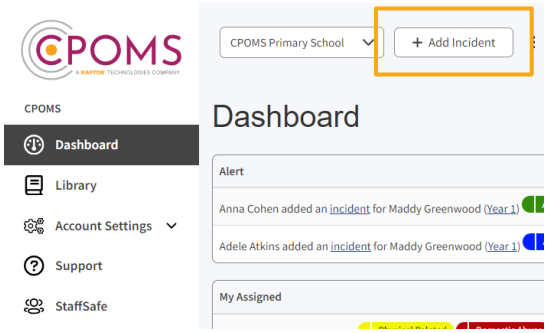
4 Adding an Incident

To add a new incident to the system click on the **'Add Incident'** button, available to the top left of your dashboard.



You will then be taken to the 'Add Incident' form, where you can fill in all of the details about the incident.

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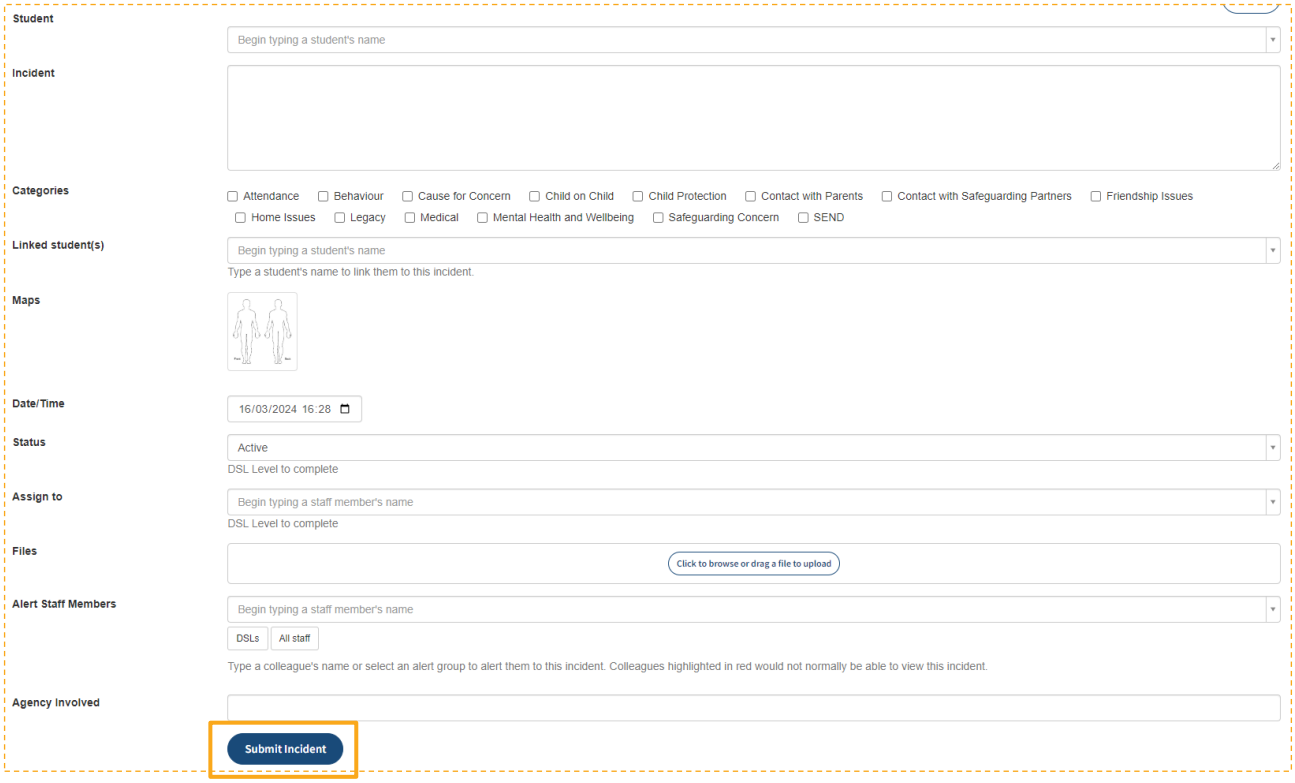
Add Incident Form (Non-Key Holder)



Student

Begin to type in part of the name of the student that you would like to add an incident about. This will begin to filter through all of the student names held within the system. Once their name appears for selection, please click on it. *If you select the wrong name click on the 'x' delete button to choose an alternative student.*

Incident

Fill in the 'Incident' text box with all of the details about the incident which you are adding. This is a free text box so you can add as much or as little as needed. Be careful to be **accurate** and **specific.**

*When inputting any linked student names into the incident text box, please ensure that you spell their name **identically** to how it is spelt within your MIS. This ensures that if the school needs to use the 'Hide Names' feature when reporting in the future, their name will be detected and blanked out.*

*If a student mentioned in the incident text will **not** be linked into the incident their name will not automatically be picked up by the 'Hide Names' feature should the school need to use it.*

*If recommended by your LA/Safeguarding Advisor **or** if you have a 'People Involved' custom field setup, you may use their initials instead or terms such as mum/ dad/ brother/ sister within the incident text.*

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Categories
Once you have filled in all of the details about the incident, you need to select at least one category to assign it to. If there is an overlap you may select more than one.

Linked student(s)
You can then choose to link in other students if more than one is involved in a particular incident. This will copy the incident to all pupils selected. You can also click to monitor the linked student under the same category(s) if necessary and choose whether to share any documents you attach to the incident to their profile(s) as well.

Maps
The 'Maps' feature allows you to apply numbered markers to a map image to support your incident text. This will default to our 'Body Map'.

Date/Time
Following this you can select a date and time. These will both default to the current date and time, however if you wish to change it to when the incident actually occurred you can do so here.

Status
You may set the 'Status' of the incident to 'Active' or 'Closed'.

Assign to
You may also assign an incident to a specific staff member *(Key Holders Only)* if they will be dealing with it, by selecting their name in the 'Assign to' field. *The chosen user will then receive an email notification to alert them to this and the incident will appear in the 'My Assigned' area of their dashboard until the incident status changes to 'Closed'*

Files
If you would like to attach a file/ document to support the incident *e.g. a social services letter, previous school case notes, or meeting minutes etc.* you can do so at this point. Simply click to browse and find the relevant document on your machine and add or drag a file from one of your folders into the area to upload.

Alert Staff Members
Next, you can choose which members of staff you wish to alert. Begin typing a name and CPOMS will filter through all CPOMS registered staff members for you to select from. Alternatively you can select to alert an entire alert group by choosing the relevant alert group button(s) available beneath the individual alert option.

Agency Involved
You can also add any agency names to the incident to make others aware of which agencies are involved with this incident/ pupil.

Once all of the above has been done, you must select the **'Add Incident'** button to submit. This will then send out email alerts to all of the selected staff members telling them that they need to log in to CPOMS to look at a newly added incident.

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5 Extra Features

A few final features on CPOMS are the **Hide Names** and **Blank Screen** functions, plus our extensive **Support** section.

You will find all of our Support options in the left-hand navigation panel.

Hide Names and Blank Screen mode are available in the top-right corner throughout CPOMS.

5.1 Hide Names

The **Hide Names** mode, available in the top right-hand corner of your screen, will star out the names of all students within the system. This follows suit throughout every page until you turn it off by re-clicking the button, which would now be called **Show Names**.

5.2 Blank Screen

The **Blank Screen** mode, available in the top right-hand corner of your screen, will quickly provide you with a cover to hide your screen; for example, if you are perhaps interrupted by someone who you do not want to see your screen when adding a new incident, without having to lose where you are in the system.

The blank screen mode will automatically activate after fifteen minutes of inactivity.

5.3 Contact Support

The **Support** section is available in the left-hand navigation panel.

Here you will find a comprehensive user guide, our step-by-step help sheets and FAQs, a Knowledge Base which includes searchable help articles, training videos and upcoming live webinars, as well as the Contact Support function should you need to contact us.

To raise a ticket with us, simply click on the 'Contact Support' button, enter your subject, message, phone number and submit. You may also attach any files to support your query here, i.e. a screenshot of an error message. This will then be sent directly to our CPOMS helpdesk where someone will carry out your request as soon as possible and notify you once it has been completed.

Contact Support is for any and all queries, however, if your request is **URGENT** please contact us by **telephone** on **01756 797766.**

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N.B Please note, any official requests are required in writing, therefore if you contact us via telephone you will often be referred to the Contact Support function.

6 CPOMS Support

Should you require any support at all for CPOMS our contact details are as follows:-

CPOMS Systems Limited
Unit 7
Acorn Business Park
Skipton
North Yorkshire
BD23 2UE

Telephone:- 01756 797766

e-Mail:- support@cpoms.co.uk

X/ Twitter | **Facebook** | **Instagram** | **LinkedIn**

There is also a built in **'Contact Support'** function, within the **Support** section (located in the left-hand navigation panel), which links directly to our helpdesk.

☎ The office is open Monday to Thursday 8:30am to 5:30pm, and Friday 8:30am to 5pm.

If your request is URGENT please always contact us by telephone.

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