

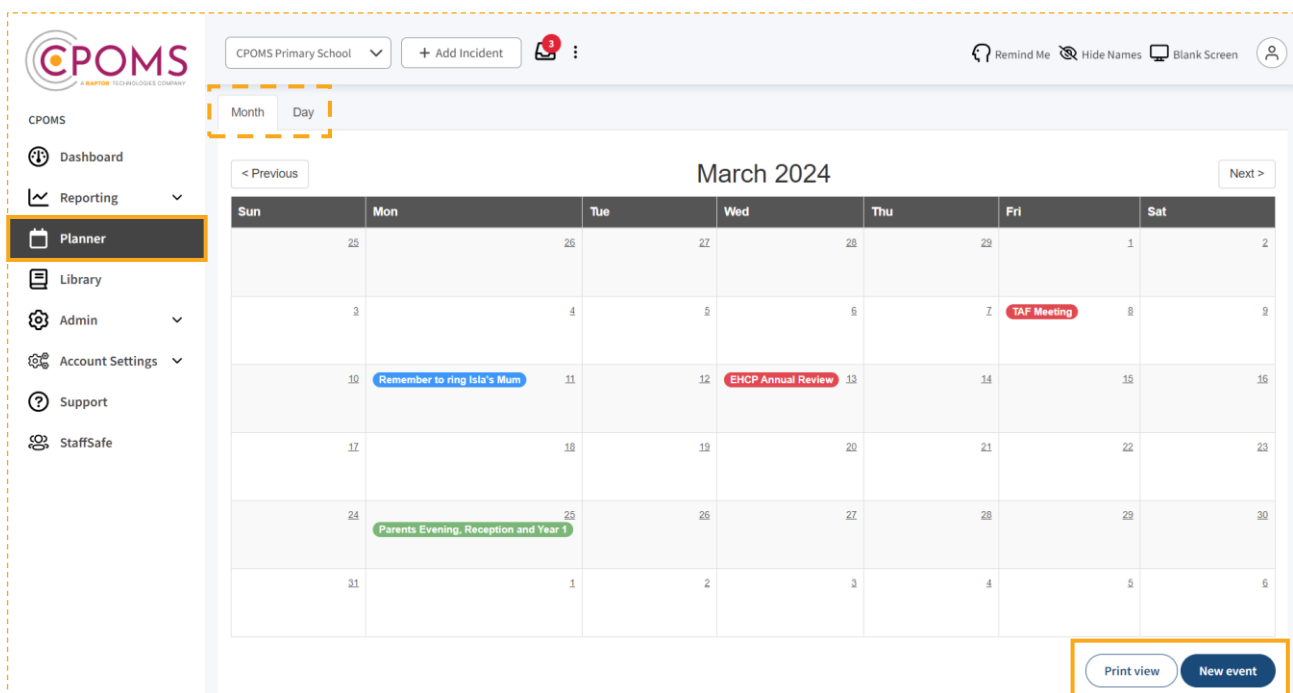
## Planner

CPOMS contains a **'Planner'** functionality, which can be accessed by those with both two-factor authentication setup and the relevant 'Planner' permissions selected within their User Group.

A CPOMS **Admin Key Holder**, can check and amend your User Group permissions via **'Admin' > 'Users'** tab, by clicking on a User Group name (to the right-hand side of the page).

<input type="checkbox"/>	Planner
<input checked="" type="checkbox"/>	View calendar
<input checked="" type="checkbox"/>	Add events
<input checked="" type="checkbox"/>	Add public events

The **'Planner'** area is available in the left-hand navigation panel.



The screenshot shows the CPOMS Planner interface. On the left is a navigation menu with options: Dashboard, Reporting, Planner (highlighted), Library, Admin, Account Settings, Support, and StaffSafe. The main area displays a calendar for March 2024. The calendar shows events such as 'Remember to ring Isla's Mum' on Monday 10th, 'EHCP Annual Review' on Wednesday 12th, 'TAF Meeting' on Friday 7th, and 'Parents Evening, Reception and Year 1' on Monday 24th. At the bottom right, there are buttons for 'Print view' and 'New event'.

The **'Planner'** displays any events or reminders set for each month, in a familiar calendar layout.

A day view is also available, which shows a timeline style display of events for the selected day. *Click on the date number to view a particular day.*

Public, shared and private events are differentiated by colour. Please see below key:-

Public event
Shared event
Your private event
Your shared event
Your public event

You may print a copy of the calendar, by selecting the **'Print View'** button, in the bottom right corner. This will generate a print-friendly PDF version, which you can then choose to print.

## New Event

To create a new event, click on the **'New event'** button, in the bottom right corner.

Complete the **'New event'** form:-

### New event

[Add student link\(s\)](#)

**Title**

**Text**

**Event at**  
16/03/2024 07:41

[Add reminder](#)

**Make event recur**

**Public**

**Shared with**  
  
These people will also receive an alert for this event

[Back](#) [Save Event](#)

 **Add student link(s)** – if the event is in relation to a student, you may add a student link.

*This is useful for example if you have a case review meeting for a particular child or family. You can then click through to their profile easily from the event to run off a comprehensive incident report ahead of the meeting.*

The event will also display at the top of the students 'Overview' tab, within their profile, until the event has taken place.

- ③ **Title** – enter a title or short summary about the event, this title will display in the calendar view.  
*For example, TAF/ TAC Meeting (Team around the Family/ Child), PEP Meeting (Personal Education Plan Meeting), Annual EHCP Review for student.*
- ③ **Text** – enter any further text about your event, *e.g. details of where it will take place, who else will be attending, a meeting agenda etc.*
- ③ **Event at** – choose your event date and time.
- ③ Click **'Add reminder'** to set a reminder for the event, you will then be able to choose your reminder timeframe *e.g. 1 week, 1 day, 1 hour before.*
- ③ **Make event recur** – if the event will reoccur in the future, tick 'Make event recur'. You can then choose its recurrence basis, *e.g. daily, weekly, monthly* and the number of recurrence you require. Choose your **'reminder'** timeframe, if required.
- ③ **Public** – tick 'Public' if you would like to share this event with all key holders with access to the Planner area. ***Not recommended for personal or confidential events.** If this option is not ticked, the event will automatically default to private.*
- ③ **Shared with** – begin to type the name of any other staff members you wish to share the event with and click on it once it appears for selection, *i.e. other attendees of a meeting.* The event will then appear within their planner area, and they will also receive any reminders that you have set for the event.
- ③ When you are ready click **'Save Event'**.

## 'Edit' or 'Delete' an existing event

To edit or delete an existing event, simply locate it within your 'Planner' and click on the event title to view further information about it.

Beneath the event information (to the right-hand side), you will see buttons to **'Edit'** or **'Delete'**.

## Event

Only you can see this event	
Linked to	Student: Maddy Greenwood
Title	TAF Meeting
Text	TAF Meeting
Event at	Fri, 05 Apr 2024 13:00
Reminders	<input type="button" value="Edit"/> <input type="button" value="Delete"/> Reminder set for Fri, 05 Apr 2024 12:30 <input type="button" value="Add reminder"/>

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

