

Cases Module

The **'Cases'** module in CPOMS StudentSafe allows you to assign incidents to a specific user, and mark the incident status as 'Active', 'Closed' or 'No Further Action'.

A **'My Assigned'** section appears on each Key Users Dashboard, advising the user of any active incidents assigned to them. Once an incident is marked as 'Closed' or 'No Further Action' it will no longer appear in this section.

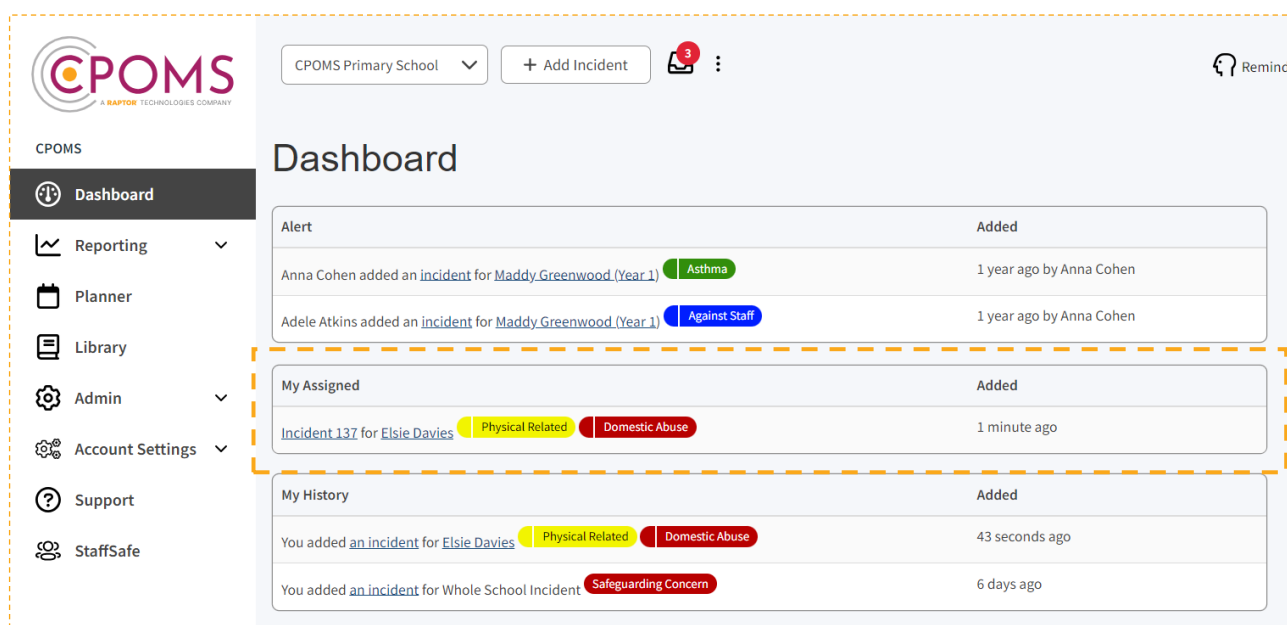
When a Key User is assigned a new incident, they will receive an email alert notification to inform them of this.

The 'Assigned to' and 'Status' fields also appear within the reporting 'Filter Incidents' options, so you are able to report on 'Active' incidents only, those 'Assigned to' a particular user, or those that are unassigned, for example.

This module can be switched off on request.

Dashboard: My Assigned

A **'My Assigned'** section will appear on each Key Users Dashboard so they can quickly see any active incidents assigned to themselves.



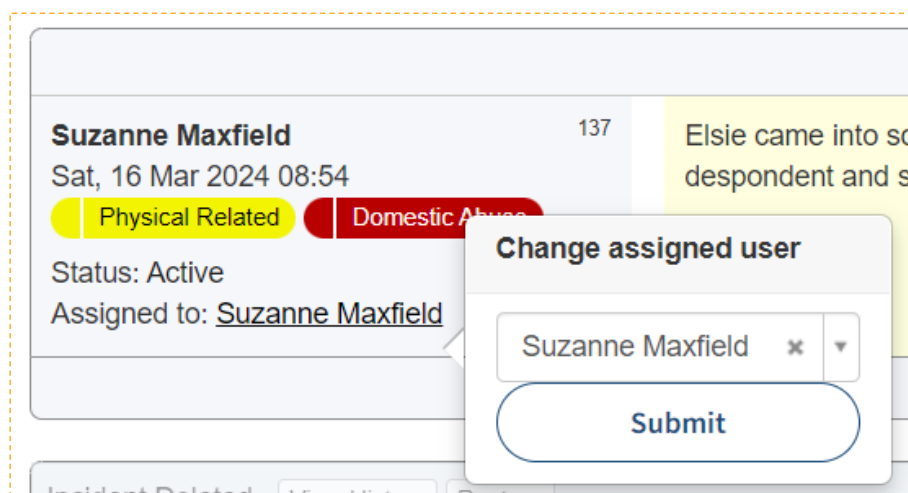
The screenshot shows the CPOMS StudentSafe Dashboard for 'CPOMS Primary School'. The left sidebar contains navigation links: Dashboard, Reporting, Planner, Library, Admin, Account Settings, Support, and StaffSafe. The main content area is titled 'Dashboard' and contains three sections: 'Alert', 'My Assigned', and 'My History'. The 'My Assigned' section is highlighted with a dashed orange box and contains one incident: 'Incident 137 for Elsie Davies' with tags 'Physical Related' and 'Domestic Abuse', added 1 minute ago. The 'Alert' section shows two incidents: 'Anna Cohen added an incident for Maddy Greenwood (Year 1)' with tag 'Asthma' (1 year ago) and 'Adele Atkins added an incident for Maddy Greenwood (Year 1)' with tag 'Against Staff' (1 year ago). The 'My History' section shows two incidents: 'You added an incident for Elsie Davies' with tags 'Physical Related' and 'Domestic Abuse' (43 seconds ago) and 'You added an incident for Whole School Incident' with tag 'Safeguarding Concern' (6 days ago).

If you click on the incident number hyperlink, it will take you directly to the incident to review.

How to assign an incident to a user

To the left of incident text, you will see two options for **'Status'** and **'Assigned to'**. To assign the incident to a user, click on Assigned to: 'Nobody' and choose who you would like to assign the incident to and **'Submit'**.
(please note, incidents can be assigned to Key Users only)

The option to assign will also appear on the initial 'Add incident' form for Key Users to choose from when adding a brand new incident.



When an incident is assigned to a staff member, it will display as an 'Edit' in the bottom-right corner of the incident. By selecting 'Options' (in the top-right corner of the incident) and then 'History,' you can view the details of who assigned the incident and when.

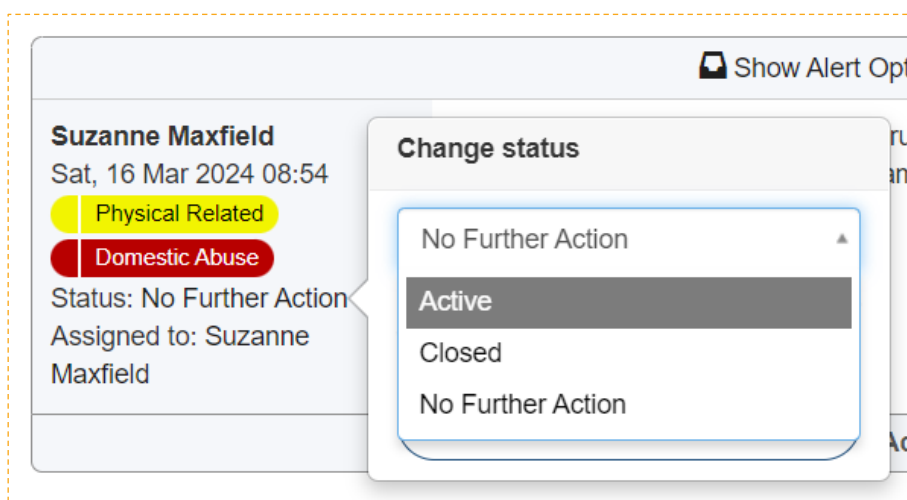
How to amend an incident status

To the left of the incident text, Key Users will see two options for **'Status'** and **'Assigned to'**. To amend the status, click on its Status: 'Active' and change it to 'Closed', or 'No Further Action', and **'Submit'**.

If the incident is 'Closed', the student will remain monitored for the incident category(s) but it will no longer be listed in your 'My Assigned' area.

If the incident is set to 'No Further Action', the student will no longer be monitored for the incident category(s) and it will not be listed in your 'My Assigned' area.

The option to set a status will also appear on the initial 'Add incident' form for Key Users to choose from when adding a brand new incident.





When an incident status is changed, it will display as an 'Edit' in the bottom-right corner of the incident. By selecting 'Options' (in the top-right corner of the incident) and then 'History,' you can view the details of who updated the incident status and when.

Bulk closing incidents

An Admin Key Holder can bulk close incidents via the **'Admin'** area > **'Bulk Management'** tab.

Firstly, enter the timeframe you wish to close incidents between.

Next select the status you would like to set incidents, *during the chosen timeframe*, to:-

-  **Closed:-** If you select 'Closed', the incident statuses will be set to Closed and the students will remain monitored for the incident categories.
-  **No Further Action:-** If you select 'No Further Action', the incident statuses will be set to No Further Action and the students will no longer be monitored for the incident categories.

Click **'Update Status'** when you are ready. *Please be aware this action is irreversible.*

Bulk Management

This area will allow you to bulk update the status of incidents to 'Closed' or 'No Further Action' based on the date filters selected.

Incidents to be updated between: and

Select status: Closed

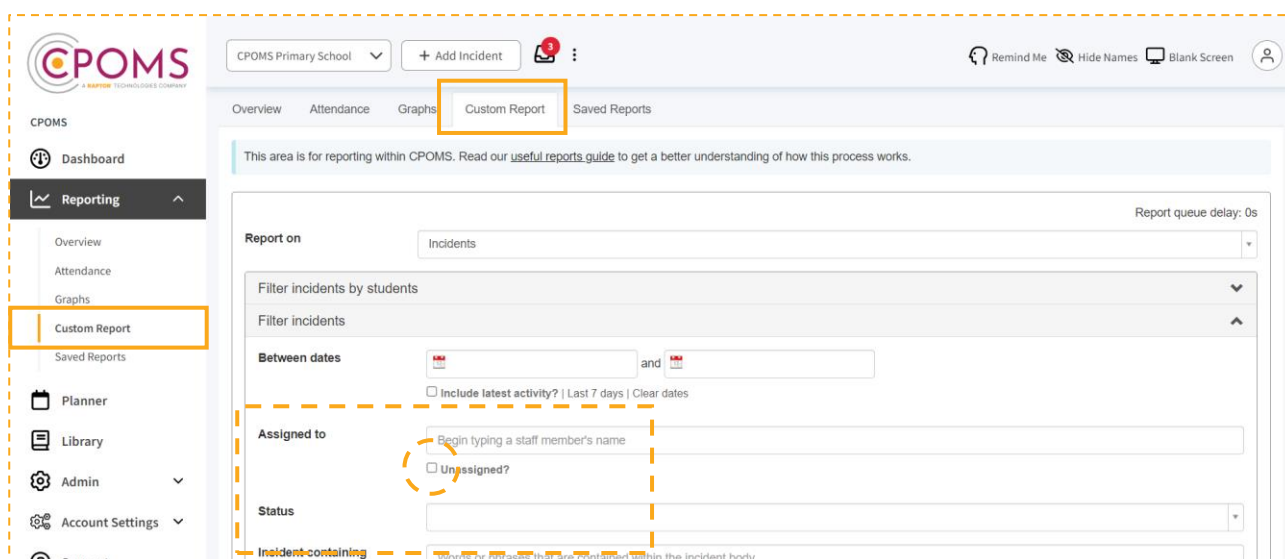
Monitoring will end if you change status to 'No Further Action'

Update Status

How do I report on this?

To report on these options, go to 'Reporting' > 'Custom Report', and open up the **Filter Incident** options.

Here you will find the filters for 'Assigned to' and 'Status'. You may also look at incidents which are 'Unassigned' by selecting the tick box here.



The screenshot shows the CPOMS web interface. On the left is a sidebar menu with options: Dashboard, Reporting (selected), Overview, Attendance, Graphs, Custom Report (highlighted with an orange box), Saved Reports, Planner, Library, Admin, and Account Settings. The main content area is titled 'Custom Report' and contains a 'Report on' dropdown set to 'Incidents'. Below this are filters for 'Filter incidents by students' and 'Filter incidents'. The 'Assigned to' filter has a text input field with the placeholder 'Begin typing a staff member's name' and an 'Unassigned?' checkbox. The 'Status' filter is a dropdown menu. At the bottom, there is an 'Incident containing' section with a text input field. The interface also includes a top navigation bar with 'CPOMS Primary School', '+ Add Incident', and user controls like 'Remind Me', 'Hide Names', 'Blank Screen', and a user profile icon.

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