

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

Things you will need before starting this process:

- The Technical Test Result.

What is the basic system functionality:

The system gives the functionality to:

- amend and result Technical Tests

The status of a batch changes from **OPEN** to **NOTIFIED** when you submit the batch.

Summary of steps to complete the process:

- **Step One:** Open a Notified Batch
- **Step Two:** Open the Notification
- **Step Three:** Edit the Notification
- **Step Four:** Resulting a Theory Test
- **Step Five:** Resulting a Practical Test
- **Step Six:** Changing the Employer details.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

1. Step One: Open a Notified Batch

- 1.1. Once logged into the system locate the batch you want to result by clicking on the **My Batches** button and then clicking on **My Notified Batches**.
- 1.2. From this screen you can see a quick summary of the Notified batches you have, showing how many Notifications you have in the batch and how many have been resulted.

Note: You do not have to result all of the Notifications in a batch at once. Should you have notifications which are a day later, you can result that notification after an earlier one. Once all notifications have been resulted, the batch will automatically close and will then appear in **My Closed Batches**.

- 1.3. To open the batch click on the **Open** button.

My Batches

Batches have three statuses: Open (not yet notified), Notified (awaiting test results), and Closed (all results recorded).

My Open Batches
My Notified Batches
My Closed Batches

Batch Name	Purchase Order Reference	Cost of Batch (£)	Created By	Date Created	Last Modified By	Notifications	Resulted	
20080901 Notified	PO123456	25	Test Centre User	17/07/2008 10:50:57	Test Centre User 1	1	0	Open

Cancel

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

2. Step Two: Open the Notification

- 2.1. When you open the Batch, you will see a familiar screen showing the batch summary in more detail. However, the buttons which you would have used before are now disabled.
- 2.2. From this screen you can view the notifications by clicking on the **Notifications** button.

Batch: 20080901 Notified

Summary **Notifications**

Batch Name:	20080901 Notified
Batch Purchase Order Reference:	PO123456
Created By:	Test Centre User
Date Created:	17/07/2008 10:50:57
Date Last Modified:	17/07/2008 11:55:41
Last Modified By:	Test Centre User
Number of Notifications:	1
Number of Notifications Resulted:	0
Cost to Date (£):	25
Batch Status:	Notified
Notification Clashes:	0

List Batches Edit Batch Add Notification Submit Batch

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

- 2.3. When you view the Notifications within a batch you will see more specific information about each Notification. You can see the result status of the notification.
- 2.4. There are three choices you can select from here:
- **View:** allows you see a read only version of the Notification Wizard
 - **Edit:** allows you to change a notification
 - **Result:** allows a Technical Test to be resulted

Batch: Test batch for user Guide

Summary Notifications

Test Ref	Individual ID	Individual Name	Site	Category	Tester ID	Test Level	Test Type	Test Date/Time	Cost (£)	Clashes	Resulted	Result			
84849	3111097	Sarah Sample	200	A61	133730	Standard	Theory	12/04/2010 08:00:00	25	0		Pending Achievement	View	Edit	Result
84850	3111097	Sarah Sample	200	A61	133730	Standard	Practical	12/04/2010 09:16:00	25	0		Pending Achievement	View	Edit	Result

Add Notification Submit Batch Print All Selected

- 2.5. By clicking on the **View** button you will be shown a read only version of the Notification Wizard; no values can be changed in the view state of the Wizard.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

3. Step Three: Edit the Notification

3.1. By clicking on the **Edit** button you will be shown the Notification Wizard where you will be allowed to make changes to the following elements up to and including the day of the test:

- Individual
- Tester
- Employer
- Category – See A, B and C below
- Type of Test – See A, B and C below
- Level of Test – See D below.

Edit Notification 8438 For Batch: LKANKYF

Notification Steps

- **Information**
- [Individual](#)
- [Site](#)
- [Tester](#)
- [Category](#)
- [Technical Test](#)
- [Employer](#)
- [Summary](#)

This wizard will help you create a notification step-by-step. You can use the menu on the left hand side to navigate the stages required to complete a Technical Test Notification.

Stage	Mandatory	Description
Individual	Yes	The page allows you to search to find an Individual. You will need the Individual's ID number, Surname, and Date of Birth.
Site	Yes	This is where the Technical Test will take place; you will be able to choose from your pre-approved sites.
Tester	Yes	This will be a Tester of the Technical Test; you will be able to choose from your pre-approved Testers.
Category	Yes	This is the Category the Technical Test will be carried out on.
Technical Test	Yes	Further details about the Technical Test such as Type, Level, Date, and Time of Technical Test. Please note that extra guidance is given in the User Guide.
Employer	No	An Employer ID can be given here to aid Grant claim.

Start Cancel

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

- A. The category and type of test can be changed but if the implication of the change is a longer duration (i.e. from a Theory to a Practical) so that the finish time now falls into Out of Hours then the changes to the Technical Test Notification **cannot** be saved. If you wish to do this, please contact the CPCS Department who will make the change and raise a manual invoice for the additional Out of Hours Fee either by:
 - o Telephone on **0844 844 4745** or
 - o E-mail to cpcs.product@citb.co.uk.
- B. The category and type of test can be changed but if the implication of the change is a shorter duration (i.e. from a Practical to an OSA) so that the finish time no longer falls into Out of Hours then the changes to the Technical Test Notification can be saved but no refund can be offered.
- C. If the category and type of test are changed the system will warn of clashes i.e. if a longer test is scheduled so that the end overlaps the start of another to be delivered by the same Tester, but the system will let the user progress through and submit the notification.
- D. The only element of the Advanced Technical Test Notification that can be changed is its reduction to a Standard Technical Test Notification (at which point all other rules above apply) but no refund can be offered.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

4. Step Four: Resulting a Theory Test

4.1. By clicking on the **Result** button you can result the notification.

4.2. There are three choices of Result for a Technical Test Notification:

- **Achieved:** This is where the Technical Test element has been passed
- **Not Achieved:** This is where the Technical Test element has not been passed
- **Cancelled:** This is where the Technical Test element has been withdrawn.

Note: A Test Centre will not be able to result an Advanced Technical Test until a Monitor Report has been completed by the CPCS Monitor confirming the result. The Test Centre will receive an email once a Monitoring Report has been completed to prompt the Test Centre to result the Advanced Technical Test.

4.3. Each of these choices is available within the drop down list.

The screenshot shows a web form with the following elements:


- Result Status:** A dropdown menu currently showing "--Please Select--". The dropdown is open, displaying the following options: "--Please Select--", "Achieved", "Not Achieved", and "Cancelled".
- Employer ID Number:** An input field.
- Employer Name:** An input field.
- Search:** A button to the right of the input fields.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

- 4.4. When **Achieved** or **Not Achieved** is selected a box will appear where you can enter the **Actual Duration** of the Test. This is to enable test times to be monitored and appropriate adjustments made. A warning will also appear asking if you are sure you have entered the correct result.

Result Status:	<input type="text" value="Achieved"/>	Warning: Are you sure that you have entered the correct result.
Actual Duration	<input type="text"/>	
		Enter duration in minutes. e.g. 1 hour 30 mins = 90

- 4.5. If you enter the incorrect format ie anything other then numeric's into the Actual Duration field an error message will be returned and you will not be able to result the Technical Test until the correct format has been entered.

 Invalid details found

- Actual Duration must be numeric

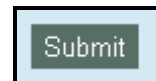
- 4.6. By clicking on the **Cancelled** button, you will be given the opportunity to record a short note as to why the Technical test was cancelled. This box is only 500 characters long and should not be used to keep anything more than a short description. This description will be available to CPCS to view. A warning will also appear asking if you are sure you have entered the correct result.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

Result Status: Warning: Are you sure that you have entered the correct result.

Cancellation Details

4.7. When you have selected the correct result for the Notification click on the **Submit** button to record the result.



Note: Once the result has been submitted, you will not be able to change any of the Notification details or the actual result of the Notification. Once all notifications have been resulted, the batch will automatically close and will then appear in **My Closed Batches**.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

5. Step Five: Resulting a Practical Test

5.1. By clicking on the **Result** button you can result the notification.

5.2. There are three choices of Result for a Technical Test Notification:

- **Achieved:** This is where the Technical Test element has been passed
- **Not Achieved:** This is where the Technical Test element has not been passed
- **Cancelled:** This is where the Technical Test element has been withdrawn.

Note: A Test Centre will not be able to result an Advanced Technical Test until a Monitor Report has been completed by the CPCS Monitor confirming the result. The Test Centre will receive an email once a Monitoring Report has been completed to prompt the Test Centre to result the Advanced Technical Test.

5.3. Each of these choices is available within the drop down list.

The screenshot shows a search form with the following fields and options:

- Result Status:** A dropdown menu currently showing "--Please Select--". The dropdown is open, showing the following options: "--Please Select--", "Achieved", "Not Achieved", and "Cancelled".
- Employer ID Number:** A text input field.
- Employer Name:** A text input field.
- Search:** A green button to submit the search.

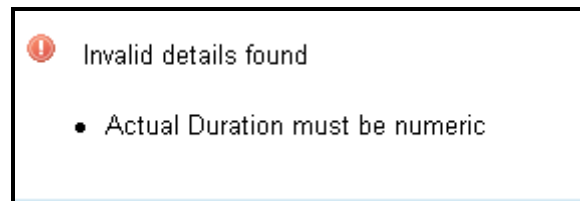
5.4. When **Achieved** or **Not Achieved** is selected a box will appear where you can enter the **Actual Duration** of the Test. This is to enable test times to be monitored and appropriate adjustments made. A warning will also appear asking if you are sure you have entered the correct result.

The screenshot shows the search form with the following changes:

- Result Status:** The dropdown menu is now set to "Achieved".
- Actual Duration:** A new text input field has appeared below the Result Status field.
- Warning:** A red warning message is displayed: "Warning: Are you sure that you have entered the correct result." Below this, a note says "Enter duration in minutes. e.g. 1 hour 30 mins = 90".

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

- 5.5. If you enter the incorrect format ie anything other then numeric's into the Actual Duration field an error message will be returned and you will not be able to result the Technical Test until the correct format has been entered.



- 5.6. By clicking on the **Cancelled** button, you will be given the opportunity to record a short note as to why the Technical test was cancelled. This box is only 500 characters long and should not be used to keep anything more than a short description. This description will be available to CPCS to view. A warning will also appear asking if you are sure you have entered the correct result.

Result Status: Cancelled Warning: Are you sure that you have entered the correct result.

Cancellation Details

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

5.7. If the candidate Achieved and is applying for a Trained Operator Card you will need to ensure that the **Card Type** selected is **Red** you will now be required to capture the following information:

- **Terms and Conditions:** Tick the box, to certify the candidate has accepted the terms and conditions.
- **LGV Licence (if applicable):** Tick the box, to certify that you have validated and stored a copy of an LGV licence held by the candidate.
- **Photograph:** Tick this box, to certify that the photograph is a true likeness of the candidate, detailed in the notification. A photograph will be shown here if the candidate has previously had one captured through their Health, safety & environment test, if **No Photo Available** is showing you will not be able to tick this box until a photograph has been uploaded. See below on how to upload a photograph.

Please note: If the **Card Type** selected is **Blue** you do not have to complete the additional fields and must submit Application for a First CPCS Operator Card or to add Further Categories (F1/1) or the Carding without Application form (CWA).

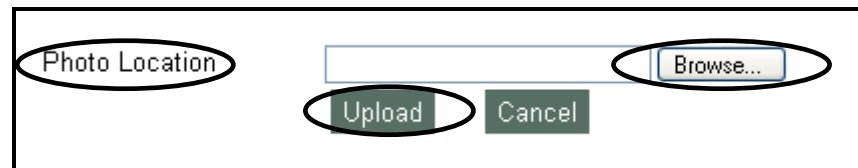
The screenshot displays a form with the following elements:

- Card Type:** A dropdown menu showing 'Red' (selected) and 'Blue'.
- Terms and Conditions:** A checkbox with the text: "By checking this box, you certify that the candidate has accepted the terms and conditions."
- LGV Licence:** A checkbox with the text: "By checking this box, you certify you have validated and stored a copy of an LGV license held by the candidate."
- Photograph:** A checkbox with the text: "By checking this box, you certify that the photograph is a true likeness of the candidate, detailed within this notification."
- Photo Upload:** A placeholder area containing the text "No Photo Available" and an "Upload Photo" button.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

Note: If **No Photo Available** is showing or the one already captured is not suitable you must take a photograph of the candidate and upload in to CPCS-ON.

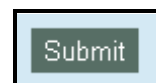
- 5.8. Click on **Upload Photo** and a new box will appear as below, click on **Browse** to search for the **Photo Location** (this will be the area where you store your photographs, for example **My Pictures**). When you have located the photograph double click on the image or click on **open** and the folder which contains the photo will now show in **Photo Location**, click on **Upload**:



Your photograph will now appear in the box as below if it is suitable click **Accept Photo**, if not click **Cancel** and follow step 5.8.



- 5.9. When you have selected the correct result for the Notification, selected the Card Type and checked the Terms & Conditions, LGV Licence and uploaded a photograph, click on the **Submit** button to record the result.



How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

5.10. Once the result has been submitted, the request will initially go to the **Not Eligible** tab within the **Cards** tab with a status description of: Validation incomplete - please try again later and status of Validating.

Individual ID	Name	Category	Test Date	Status
800463	Jo Smith	A64A	01/03/2016 09:01:00	Validation incomplete - please try later.

This adjustment to the card request process has been introduced to accommodate the performance issue raised in 2015, this change will refresh in 5 minute intervals. Once refreshed the request will either:

A – move to the **Eligible** tab or

B – remain in the **Not Eligible** tab with the correct Not Eligible status description

Note: Once the result has been submitted, you will not be able to change any of the Notification details or the actual result of the Notification. Once all notifications have been resulted, the batch will automatically close and will then appear in **My Closed Batches**.

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

6. Step Six: Changing the Employer Details

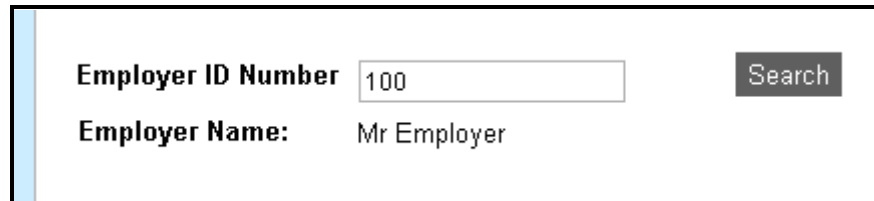
- 6.1. A summary screen of the Technical test Notification is displayed here to help identify the correct Notification to result.
- 6.2. From this screen you can change the Employer should you need to; here the Employer is an optional field and if left blank then it will not affect the resulting of the Notification. It may, however, affect the ease of which the Employer can claim Grant
- 6.3. To change the Employer click on the **Change** Button.

Test Result For Batch: 20080901 Notified

Individual Code:	3160471
Individual Name:	John Sample
Site ID:	124
Site Name:	Test Site
Category:	02A - Crawler Crane - Up to 10 tonnes
Tester:	3160472 - Mr Tester
Test Level:	Standard
Test Type:	Practical
Result Status:	<input type="text" value="--Please Select--"/>
Employer ID Number:	100
Employer Name:	Mr Employer

How to use CPCS-ON System: AMENDING OR RESULTING A NOTIFIED BATCH

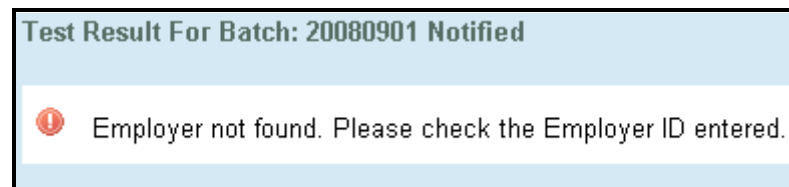
6.4. The first to do is enter in the **Employer ID Number**; this is the Employers Levy number. By clicking on the **Search** button the system will then search for the **Employer Name**.



Employer ID Number Search

Employer Name: Mr Employer

6.5. An unsuccessful search will display the message below.



Test Result For Batch: 20080901 Notified

⚠ Employer not found. Please check the Employer ID entered.

6.6. A successful search will display the following choices, from here you can either:

- **Update:** This will save the current search to the Notification Employer
- **Cancel:** This will back out of any changes and return the Employer to the Original state
- **New Search:** This will clear the search terms down and take you back to the search screen.



Employer ID Number Search

Employer Name: New Search Builders Ltd Update Cancel New Search