

How to use CPCS-ON System: CREATING A NOTIFICATION

Things you will need:

- The notification information

What is the basic system functionality:

This system gives the functionality to notify the CPCS scheme of Technical Tests without the need to send any files by email, call or arrange with CITB staff. The timing of the notification is within your control.

There are, however, some considerations as laid out in the CPCS Scheme Booklet for Test Centres:

- All tests notified for weekends or public holidays (England and Wales) are considered out of hours and will be charged at an enhanced rate
- All tests notified to start before or end after normal business hours (currently 08:00 to 17:00 Mon to Fri, 09:00 to 13:00 Sat) are considered out of hours and will be charged at an enhanced rate
- In accordance with scheme booklet, notification needs to be submitted by 6pm and have two (for Standard tests, 5 for Advanced tests) clear business days before the test takes place see example below

Test Date	Notify by (Date and Time) Standard (2 days)	Notify by (Date and Time) Advanced (5 days)
Friday 24/01/2014	Before 6pm Tuesday 21/01/2014	Before 6pm on Thursday 16/01/2014
Thursday 15/05/2014	Before 6pm Monday 12/05/2014	Before 6pm on Wednesday 07/05/2014
Tuesday 27/05/2014	Before 6pm Wednesday 21/05/2014	Before 6pm on Friday 16/05/2014

Summary of steps to complete the process:

- **Step One:** Open or create a Batch
- **Step Two:** Start the "Wizard"
- **Step Three:** Add an Individual
- **Step Four:** Add a Category
- **Step Five:** Add a Technical Test Details
- **Step Six:** Add a Site
- **Step Seven:** Add Tester
- **Step Eight:** Add Technical Test Details
- **Step Nine:** Add an Employer
- **Step Ten:** Complete the Notification.

How to use CPCS-ON System: CREATING A NOTIFICATION

1. **Step One: Open or create a Batch**
 - 1.1. To create a notification, you need to **Create a Batch** to hold the notification in.
 - 1.2. Every notification must be within a batch. A batch can contain just one notification or it can contain many notifications.
 - 1.3. How to create or open a batch is covered in the document entitled:
 - **How to use CPCS-ON - Preparing a Batch for Notification**

How to use CPCS-ON System: CREATING A NOTIFICATION

2. Step Two: Start the Wizard

2.1. From the batch summary page, click on the **Add Notification** button to start the wizard.



2.2. The start of the wizard gives you list of all the requirements you need to complete to fulfill a notification.

2.3. To start the wizard, click on the **Start** button. You can cancel the notification at any time throughout the process.

2.4. You can navigate through the wizard using the left hand menu items as well.

Notification Steps

- **Information**
- Individual
- Category
- Technical Test
- Site
- Tester ID
- 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.
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.
Site	Yes	This is where the Technical Test will take place; you will be able to choose from your pre-approved sites.
Tester ID	Yes	This will be a Tester of the Technical Test; you will be able to choose from your pre-approved Testers.
Employer	No	An Employer ID can be given here to aid Grant claim.

Start Cancel

How to use CPCS-ON System: CREATING A NOTIFICATION

3. Step Three: Add an Individual

Notification Steps

- Information
- **Individual**
- Category
- Technical Test
- Site
- Tester ID
- Employer
- Summary

Select the Individual that is taking the Technical Test.

ID Number	<input type="text"/>
Surname	<input type="text"/>
Date of Birth	<input type="text"/>

3.1. There are three pieces of information you will need to locate an individual in this system which are:

- Registration Number
- Surname and
- Date of Birth.

3.2. To locate an individual to add to the test your search must contain:

- Registration Number **and**
- Surname **or**
- Date of Birth.

How to use CPCS-ON System: CREATING A NOTIFICATION

Notification Steps

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

Select the Individual that is taking the Technical Test.

ID Number	<input type="text" value="1905657"/>
Surname	<input type="text" value="Edwards"/>
Date of Birth	<input type="text" value="02/09/1970"/>

3.3. An example of this could be:

- Registration and Surname 1905657 and EDWARDS
- Registration and Date of Birth 1905657 and 02/09/1970
- Registration, Surname and Date of Birth 1905657 and EDWARDS and 02/09/1970

3.4. Click on the **Search** button to perform the search.

3.5. If the search has been successful, you will get the information about that candidate returned to your screen this will include information on the Health & Safety status of the individual.

Add New Notification To Batch: User Guide

This individual's Health and Safety test expired on 20/03/2011. A candidate should have an in-date Health and Safety pass before taking a Technical Test. Please note continuing without a valid Health and Safety test pass completed within two years may invalidate this Technical Test result.

How to use CPCS-ON System: CREATING A NOTIFICATION

Notification Steps

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

Select the Individual that is taking the Technical Test.

ID Number	1905657
Surname	Edwards
Date of Birth	02/09/1970

Name: Melanie Anne Edwards
ID Number: 1905657
Date of Birth: 02/09/1970

Scheme Membership

Card Type	Start Date	Expiry Date
CPCS Competence Card	11/02/2008	28/02/2013
Categories	Start Date	Expiry Date
Health and Safety Tested	11/02/2008	28/02/2013
Lorry Loader - Clamshell Bucket	11/02/2008	28/02/2013
Lorry Loader - Hook	11/02/2008	28/02/2013
Card Type	Start Date	Expiry Date
CPCS Trained Operator Card	16/06/2008	-
Categories	Start Date	Expiry Date
Excavator 360 above 10 tonnes - Tracked	16/06/2008	15/06/2011
Excavator 360 below 10 tonnes - Tracked	16/06/2008	15/06/2011
Forward Tipping Dumper - Wheeled	10/09/2008	09/09/2010
Health and Safety Tested	21/10/2008	20/10/2011

Note: Categories that have expired are shown in Scheme Membership and are grey in colour.

How to use CPCS-ON System: CREATING A NOTIFICATION

Health and Safety Membership

Date Passed	Type
01/11/2011	CSCS
20/03/2009	CSCS

By checking this box, you certify that the candidate has accepted the terms and conditions.

By checking this box, you certify you have validated and stored a copy of an LGV license held by the candidate.

By checking this box, you certify that the photograph is a true likeness of the candidate, detailed within this notification.



Upload Photo

Please note: These boxes do not have to be completed at notification stage but you must ensure they are completed when resulting a Practical Test to enable a Trained Operator Card to be requested.

Add Individual

New Search

Book Health and Safety Test

IMPORTANT

An individual must have passed a Health, safety and environment test before a Technical Test takes place. If the individual does not have a valid Health, safety and environment test this may invalidate the Technical Test result.

3.6. From this screen you can do the following:

- **Add Individual:** This will attach the returned individual to the instance of a Technical Test
- **New Search:** This will clear the form and the search result for you to locate another individual
- **Book Health, safety and environment test:** This link will take you to the Health, safety and environment test booking page if you wish to book a test on behalf of a candidate.

Additional Fields:

- By checking this box, you certify that the candidate has accepted the Terms & Conditions.
- By Checking this Box, you certify that you have validated and stored a copy of an LGV license held by the candidate, if applicable, please note this box will only need to be ticked if the candidate is applying for category codes A06/A78(released 10th June 2016).

How to use CPCS-ON System: CREATING A NOTIFICATION

- By checking this box, you certify that the photograph is a true likeness of the candidate, detailed within the notification
- Upload Photo: If a photo is in the system it will automatically appear here, if a photograph is not already in the system it will show No Photo Available or if the one visible is not suitable you will need to take and upload a new photo of the candidate.

Please note: The additional field boxes do **NOT** have to be completed at notification stage but you must ensure they are completed when resulting a Standard Practical Test to enable a Red Trained Operator Card to be issued. Please refer to **04 How to use CPCS System: Amending or Resulting a Notified Batch.**

How to use CPCS-ON System: CREATING A NOTIFICATION

Step Four: Add a Category

4.1. Select a category from the drop down list of categories. There is further information to assist you on **Category & Test Type Selection**.

Notification Steps

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

Select the Category of the Technical Test.

Further Information on Category and Test Type Selection

There is a difference between the three Test Types of Theory, Practical and OSA Tests:

- The Theory Test is taken at a category level, and if there are endorsements for the category the Theory Test will cover all endorsements.
- The Practical Test and OSA are taken at the level of the endorsement (if there are endorsements).

Examples

For a category **without** endorsements (ie A42 Crusher) select the Theory Test against A42, and the Practical or OSA Test against A42.

For a category **with** endorsements (ie A02 Crawler Crane) select the Theory Test against A02, and the Practical or OSA Test against either A02A or A02B.

- If a Theory Test is entered against A02A this will be rejected and asked to select a valid Test Type and category combination
- If a Practical Test is entered against A02 this will be rejected and asked to select a valid Test Type and category combination

Categories

How to use CPCS-ON System: CREATING A NOTIFICATION

- 4.2. Remember that you can only notify a Technical Test for which your Test Centre has approval for, once selected, click on the **Add Category** button.

Notification Steps

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

Select the Category of the Technical Test.

Further Information on Category and Test Type Selection

There is a difference between the three Test Types of Theory, Practical and OSA Tests:

- The Theory Test is taken at a category level, and if there are endorsements for the category the Theory Test will cover all endorsements.
- The Practical Test and OSA are taken at the level of the endorsement (if there are endorsements).

Examples

For a category **without** endorsements (ie A42 Crusher) select the Theory Test against A42, and the Practical or OSA Test against A42.

For a category **with** endorsements (ie A02 Crawler Crane) select the Theory Test against A02, and the Practical or OSA Test against either A02A or A02B.

- If a Theory Test is entered against A02A this will be rejected and asked to select a valid Test Type and category combination
- If a Practical Test is entered against A02 this will be rejected and asked to select a valid Test Type and category combination

Categories

How to use CPCS-ON System: CREATING A NOTIFICATION

5. Step Five: Add Technical Test Details

5.1. To complete the Technical Test details, we will need to know the following:

- **Level:** Is it a Standard or Advanced Test? - Where Advanced is selected you will need to have the test pre- approved by a CPCS Monitor.
- **Type:** Is it a Theory, Practical, Practical or On-Site Assessment?
- **Date:** When is the date of the test?
- **Start Time:** When will the Test take place?

Add New Notification To Batch: User Guide

Notification Steps

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

Specify the Technical Test information.

Further Information on Category and Test Type Selection

There is a difference between the three Test Types of Theory, Practical and OSA Tests:

- The Theory Test is taken at a category level, and if there are endorsements for the category the Theory Test will cover all endorsements.
- The Practical Test and OSA are taken at the level of the endorsement (if there are endorsements).

Examples

For a category **without** endorsements (ie A42 Crusher) select the Theory Test against A42, and the Practical or OSA Test against A42.

For a category **with** endorsements (ie A02 Crawler Crane) select the Theory Test against A02, and the Practical or OSA Test against either A02A or A02B.

- If a Theory Test is entered against A02A this will be rejected and asked to select a valid Test Type and category combination
- If a Practical Test is entered against A02 this will be rejected and asked to select a valid Test Type and category combination

Level

Type

Date (dd/mm/yyyy)

Start Time (hh:mm)

How to use CPCS-ON System: CREATING A NOTIFICATION

6. Step Six: Add a Site

6.1. The addition of a site to the Technical Test notification, will tell us where the test will take place.

There are two types of sites that you can inform us of:

- **Pre-approved Site:** pre-approved in your accreditation application and
- **Off Centre Site:** which can be notified to use by completing the fields using the generic Site ID Number of 200.

6.2. To select a Pre-approved Site, simply select from the drop down list and choose the Site ID Number and Name given to you on completion of your accreditation application. **Note:** You will only be shown Sites that have been pre-approved for the category selected.

Select the Site where the Technical Test is to take place.

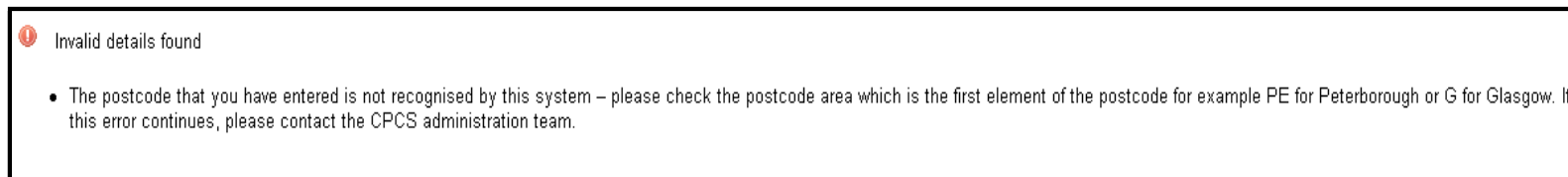
Site	<div style="border: 1px solid gray; border-radius: 5px; padding: 2px;"> -- Please Select -- </div>
Site Name	<div style="border: 1px solid gray; border-radius: 5px; padding: 2px;"> -- Please Select -- </div>
Address	<div style="border: 1px solid gray; border-radius: 5px; padding: 2px;">200 - Off Centre Site</div> <div style="border: 1px solid gray; border-radius: 5px; padding: 2px;">8381 - Test Site 1</div> <div style="border: 1px solid gray; border-radius: 5px; padding: 2px;">8380 - Test Site 2</div> <div style="border: 1px solid gray; border-radius: 5px; padding: 2px;">8382 - Test Site 3</div>
Postcode	<input style="width: 100%;" type="text"/>
Site Contact Name	<input style="width: 100%;" type="text"/>
Site Contact Number	<input style="width: 100%;" type="text"/>
Site Contact Email	<input style="width: 100%;" type="text"/>

Add Site
Clear Site

How to use CPCS-ON System: CREATING A NOTIFICATION

6.3. You can also select **Off Centre Site** if you have approval for it. To enable Postcode validation you must then select from the drop down list:

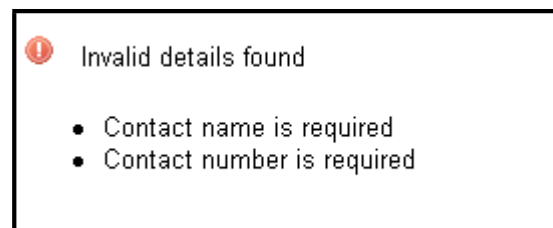
- Republic of Ireland
- Overseas
- United Kingdom: If United Kingdom is selected you must ensure that the correct Postcode is entered. If an unrecognised Postcode is entered a warning message will appear.



6.4. You can then type in the **Off Centre Site** details:

- Test Location
- Address
- Postcode (not mandatory for Republic of Ireland and Overseas)
- Contact Name
- Contact Number and
- Contact Email.

6.5. The Contact Name and Number fields are mandatory and a warning message will appear if they are not entered.



How to use CPCS-ON System: CREATING A NOTIFICATION

6.6. To add the site to the Technical Test Notification, click on the **Add Site** button

Select the Site where the Technical Test is to take place.

Site

Test Location

Address

Postcode

Contact Name

Contact Number

Contact Email

How to use CPCS-ON System: CREATING A NOTIFICATION

7. Step Seven: Add a Tester

Add New Notification To Batch: 20080901 Notified

Notification Steps

- Information
- Individual
- Category
- Site
- Tester ID
- Technical Test
- Employer
- Summary

Select the Tester who will be performing the Technical Test.

Tester: -- Please Select --

- Please Select --
- 123456 - Smith
- 123457 - Jones
- 1234568 - Bloggs
- 3160472 - Tester

Cancel

7.1. Each Technical Test Notification needs to have a Tester attached to it.

7.2. Here you can choose from your pre-approved Testers. **Note:** You will only be shown Testers who are pre-approved for the category selected.

Add New Notification To Batch: 20080901 Notified

Notification Steps

- Information
- Individual
- Category
- Site
- Tester ID
- Technical Test
- Employer
- Summary

Select the Tester who will be performing the Technical Test.

Tester: 3160472 - Tester

Surname: Mr Tester [Check Individual Record](#)

[Add Tester](#) [Clear Tester](#)

Cancel

How to use CPCS-ON System: CREATING A NOTIFICATION

- 7.3. On a successful search, the Name of the Tester is returned and you can either:
- Check the Testers credentials **or**
 - Add the Tester to the Technical Test Notification
- 7.4. Clear Tester will clear down the result and allow you to start again.
- 7.5 The check on a Testers credentials will return all of the Scheme Membership and Health and Safety details.

Add New Notification To Batch: 20080901 Notified

Select the tester who will be performing the test.

Tester: 3160472 - Tester

Surname: Mr Tester

Name: Sample Tester
ID Number: 3160472
Date of Birth: 01/01/1970

Scheme Membership

Card Type	Start Date	Expiry Date
CPCS Tester - Full	01/08/2008	31/07/2013
Categories	Start Date	Expiry Date
CPCS Tester - Full		
Crawler Crane	01/08/2008	31/07/2013

Health and Safety Membership

Date Passed	Type
01/07/2008	CSCS

How to use CPCS-ON System: CREATING A NOTIFICATION

8. Step Eight: Add Technical Test Details

8.1. To complete the Technical Test details, we will need to know the following:

- **Level:** Is it a Standard or Advanced Test? - Where Advanced is selected you will need to have the test pre-approved by a CPCS Monitor.
- **Type:** Is it a Theory, Practical, Practical or On-Site Assessment?
- **Date:** When is the date of the test?
- **Start Time:** When will the Test take place?

Add New Notification To Batch: User Guide

Notification Steps

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

Specify the Technical Test information.

Further Information on Category and Test Type Selection

There is a difference between the three Test Types of Theory, Practical and OSA Tests:

- The Theory Test is taken at a category level, and if there are endorsements for the category the Theory Test will cover all endorsements.
- The Practical Test and OSA are taken at the level of the endorsement (if there are endorsements).

Examples

For a category **without** endorsements (ie A42 Crusher) select the Theory Test against A42, and the Practical or OSA Test against A42.
 For a category **with** endorsements (ie A02 Crawler Crane) select the Theory Test against A02, and the Practical or OSA Test against either A02A or A02B.
 • If a Theory Test is entered against A02A this will be rejected and asked to select a valid Test Type and category combination
 • If a Practical Test is entered against A02 this will be rejected and asked to select a valid Test Type and category combination

Level

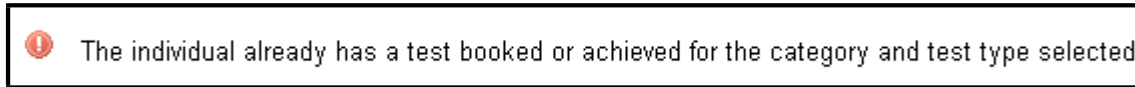
Type

Date (dd/mm/yyyy)

Start Time (hh:mm)

How to use CPCS-ON System: CREATING A NOTIFICATION

- 8.2. When you have populated the fields with your data, you will need to click on **Check**, you will be given a warning if any data is incorrect, see example below:



- 8.3. If all the information is correct then you can click **Add Test**

Add New Notification To Batch: User Guide

Notification Steps

- Information
- Individual
- Category
- Site
- Tester ID
- **Technical Test**
- Employer
- Summary

Specify the Technical Test information.

Further Information on Category and Test Type Selection

There is a difference between the three Test Types of Theory, Practical and OSA Tests:

- The Theory Test is taken at a category level, and if there are endorsements for the category the Theory Test will cover all endorsements.
- The Practical Test and OSA are taken at the level of the endorsement (if there are endorsements).

Examples

For a category **without** endorsements (ie A42 Crusher) select the Theory Test against A42, and the Practical or OSA Test against A42.
 For a category **with** endorsements (ie A02 Crawler Crane) select the Theory Test against A02, and the Practical or OSA Test against either A02A or A02B.

- If a Theory Test is entered against A02A this will be rejected and asked to select a valid Test Type and category combination
- If a Practical Test is entered against A02 this will be rejected and asked to select a valid Test Type and category combination

Level: Standard

Type: Theory

Date (dd/mm/yyyy): 20/02/2012

Start Time (hh:mm): 09:00

Estimated Finish Time: 10:00

Check





Add Test

- 8.4. The Technical Test cost is based on two factors:

- **Working Hours:** Monday to Friday 08:00 to 17:00 & Saturday 09:00 to 13:00.
- **Out of Hours:** Everything else, Public Holidays (England and Wales) are considered out of business hours.

How to use CPCS-ON System: CREATING A NOTIFICATION

8.5. If you have a test that is **Out of Hours**, you will be notified here.

<p>Start Time after 17:00 will produce this warning</p>	<p> The Technical Test will be booked out of business hours. This will incur an extra charge.</p> <ul style="list-style-type: none"> • Test end time is after 17:00
<p>Start Time Before 08:00 will produce this warning</p>	<p> The Technical Test will be booked out of business hours. This will incur an extra charge.</p> <ul style="list-style-type: none"> • Test start time is before 08:00
<p>A Date which falls on a Public Holiday (England and Wales) (eg. a Bank Holiday or Christmas) will produce this warning</p>	<p> The Technical Test will be booked out of business hours. This will incur an extra charge.</p> <ul style="list-style-type: none"> • Public holiday
<p>A Date which falls on a weekend will produce this warning (after 13:00 on a Saturday)</p>	<p> The Technical Test will be booked out of business hours. This will incur an extra charge.</p> <ul style="list-style-type: none"> • Test is on a weekend

How to use CPCS-ON System: CREATING A NOTIFICATION

9. Step Nine: Add an Employer

- 9.1. You can add an **Employer** to the Technical Test Notification. This will be used, where appropriate, when paying the Grant element of the Technical Test.
- 9.2. If you know the **Employer ID Number**, enter it into the Search field and click on **Search** button.

Add New Notification To Batch: User Guide

Notification Steps

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

Select an Employer for the Individual taking the Technical Test.
The Employer may be entitled to a Technical Test Grant.
To search, use the Employer Levy number.
Please note that this is an optional field.

Employer ID Number **Search**

No Employer

Cancel

How to use CPCS-ON System: CREATING A NOTIFICATION

- 9.3. On a successful search, you will get the **Employer Name**, next you can **Add Employer**, perform a **New Employer Search** or continue with **No Employer**.

Add New Notification To Batch: User Guide

Notification Steps

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

Select an Employer for the Individual taking the Technical Test.
The Employer may be entitled to a Technical Test Grant.
To search, use the Employer Levy number.
Please note that this is an optional field.

Employer ID Number Search

Employer Name: A Sundries

Add Employer
New Employer Search
No Employer

Cancel

- 9.4. You will have another opportunity to add an Employer to the notification when you add the result of the Technical Test.

How to use CPCS-ON System: CREATING A NOTIFICATION

10. Step Ten: Complete the Notification

10.1. The final stage of the notification is to save (finish) the details on the system; up to this point the notification has not been recorded. Only on clicking the **Finish** button will the notification be recorded.

Notification Steps

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

Summary of the notification

Individual:	1905657	Melanie Anne Edwards
Site:	1278	CPCS-ON Metastorm
Tester ID:	133625	Sample, Sam
Category:	A02 Crawler Crane	

Technical Test Details

Level: Standard

Type: Theory

Date (dd/mm/yyyy): 20/02/2012

Start Time (hh:mm): 09:00

Cost (£): 25 (Test: 25 + Out Of Hours: 0 + Monitoring: 0)

Employer Details

ID: 1

Name: A Sundries

Interpreter Required

Interpreter Language -- Please Select --

This test has been pre-approved by a CPCS Monitor:

CPCS Monitor to attend

Notification Clashes:
No clashes found

Optional action when finished select either: New blank wizard Retain details in new wizard

Finish
Cancel

How to use CPCS-ON System: CREATING A NOTIFICATION

- 10.2 You will have the **Summary** page listing all the details you have entered so far and the opportunity to change any element by navigating to the wizard using the left hand menu.
- 10.3. Where the **Level** of the Test is **Advanced** you must now tick the box to confirm that **This Test has been pre-approved by a CPCS Monitor** and select the **CPCS Monitor to attend** from the drop down list.
- 10.4. If an Interpreter is required tick the **Interpreter Required** box and select the **Interpreter Language** from the list, if the language required is not listed select **Other** and type in the **Other Language**.
- 10.5. There is an optional action at the bottom of the **Summary** page which allows a Test Centre to **Retain details in a new wizard** or select a **New blank wizard**. This will be useful in the following circumstances:
 - where multiple Appointed Persons Technical Tests are being notified and only the individual needs to be changed
 - an individual is completing a Theory and a Practical with the same Tester on the same category at the same location on the same day.
- 10.6. When you are happy with the data and wish to add the notification to the batch, click on **Finish** button.
- 10.7. These steps can be repeated until you have recorded all the notifications for this batch.