Information and Guide for CMT use – Lead CCO User

Users: you can have as many users for a club record; so I can add additional CCOs to your club as needed. The CMT is only open to CCOs, please do not share your log in with anyone else. Regional CCOs can also use it for regional issues, but don't have access to any club info.

Records: Use only **SAVE** and **SAVE & CLOSE** for now – we will take a case on for further investigation when you have had a chance to get familiar with the system and entering the cases. Sometimes there feels too many places to go, and the important thing is to keep it simple to start off with.

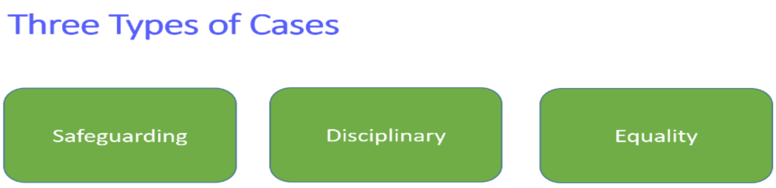
Tags: Please don't add to the tags at the moment; I am trying to build up a list of tags relevant to our cases.

Case reference: a unique system generated field. This is used behind the scenes if you ever need to reset a record or delete a record, the Case reference is a unique identifier to make sure there is no confusion. You should also use it to highlight which case you are referencing for additional advice.

If you save a record, it is there, so if you want to just test it out or try entering fields to see what it will do, **do not save the record**. I can get records deleted but would prefer not to have to keep doing that! Obviously when you have entered a real case it needs to be saved!

Overview

1. Case types



All three types of case are effectively handled the same way - the category drop down list changes. Use **Safeguarding** for now.

The workflow that follows depends on the level of severity

2. Level of severity

For Advice there is no workflow
Level 1 and Level 2 records there is workflow - see illustration below.
There are also mandatory fields to complete – the system will tell you if something is outstanding.

Advice: offered advice to members and no action to be taken.

- Subject of Concern (SOC) and Victim fields are hidden; record and then press **Save** to save it.
- If you want to save it and go back to it later, use the **Save and Close** button.

If there is a victim and SOC then set the threshold to level 1 instead. You can still record the YP affected if just Advice – they are not SOC; just mention them in the details.

An advice record is designed to basically record an enquiry from a club and the advice given – this is entered into the **Details** field.
Other tabs available for Advice record: Notes; Files, Case Chronology, Audit Log

Level 1 is a 'low level case' usually not requiring referral to any external body such as Garda/PSNI or Tusla/Gateway Teams. It can be handled internally, either in club or up to NGB depending on the type of case.

Level 2 is a 'serious' case, requiring referral to external body – Statutory Authorities, and should be reported to Head of Safeguarding**.**

For all levels, avoid using initials or Child A and Coach B etc – this makes no sense and we cannot identify a pattern of concerns into the future.

3. Buttons – Save, Save & Close, Submit

Save is used to save your work but stay on the record, effectively 'Save and Continue'
Status of the record: 'In Progress'

Save & Close is used to save your work and close the record; takes you back to the main view screen. Status of the record: 'In Progress'

Only use the following if absolutely sure you do not wish to change or add to the record:

Submit is used to move the record to the next stage (do not use unless the details are correct)
Status moves to 'Investigation' if Level 1 or 2; or 'Closed' if threshold is Advice
Lead Officer takes over (this can be the same person as the author and email a notification to the Lead Officer. The details cannot be changed once moved to Investigation or Closed
All the other tabs become available when the record is next edited (with the exception of Review which only becomes active once the investigation is complete.

Submit for Review moves the record to the final stage (do not use unless case closed)
Status of record: 'Review'.
Review tab becomes available. Not a reinvestigation of the case - it is simply a sign off stage for the record to indicate that it has been handled and investigated 'properly' and in line with organisation policy and best practice.

Overall Workflow for a Level 1 or Level 2 case

Adding Records

TAB: Case Details

This is where you enter all the details regardless of level of severity.

LHS

Primary Record type: Safeguarding/Disciplinary/Equality

Self-explanatory; use only information you know

Source of referral – this is who told you; once category is entered you will be asked for their information.

Victim –child or adult

Category of concern – this sometimes doesn't appear until save and gone back to it (it's a glitch!); choose the closest one to your case

On/Off line – self-explanatory

RHS

Abuse Position of Trust: Yes or No

Enter your club – it will be the only option for you

Source of original disclosure – who told the person who told you! Once category is entered you will be asked for their information, complete if known

Context of concern – in or out of sports, both

Tags – I will add tags to a case for the moment

Threshold Level – see overview to decide

Date

If Level 1 or 2 will need to provide Lead Officer and reason for threshold. I am checking if this can be you as Lead Officer especially for Level 1 – this is definitely in house.

Level 1 or 2 will then look for details of who is involved i.e. Victim and SOC (Subject of concern)

Details

Give details of what was reported to you; discussions etc;

Links

Self-explanatory

Attachments
Self-explanatory

Investigation Diary
Useful to record conversations had, emails (can save email in attachments), letters, meetings etc.
This will provide you with your step-by-step notes – and will be useful for us having conversations – I can add here as well as you (for your case in your club) so we can always return to the discussions we have had!

Save and Save & Close
See overview

TAB: Actions – very useful to use for current cases (not historical)

This is a little application within the main application really. It allows you to create actions against Level 1 or Level 2 cases.

There is a 3-stage workflow - Create the Action, Do the Action, Review the Action.

1: When an action is created, you are prompted to assign it to someone (the person who will be responsible for doing it) - the Actionee. This can of course be the person creating the action - I use this as a useful reminder to me to do something by a certain date. You are also prompted to enter a 'Due Date' - the date by which the action should be completed.

2: When the action is submitted, an email notification with a hyperlink goes to the Actionee. They then open the action, record what they have done to resolve the action and then submit back to the person who created the action in the first place.

3: The Action creator then receives an email notification saying the action has been completed and he/she can then review what has been done and either - sign it off and close it OR return it back to the Actionee for additional work.

Action records are a great way to demonstrate what has been done to remediate the effects of a case or to prevent it happening in the future (remedial/preventative actions) and by having due dates they are less likely to get forgotten or missed.

For your historic records, you really just want to record what has been done - the workflow is superfluous for historic records.

For historical records, i.e. those you are just adding afterwards as a complete record, note actions as an Investigation Diary entry, headed 'Actions Taken' and describe the actions taken there.

TAB: Case Management & All the Others
Take a look at this area – but take care not to get too embroiled at this stage!

Final words
This should get you started – and best to read through this with the CMT open – it makes more sense.

The RCOs will provide help if needed:
RCOConnacht@swimireland.ie Ken Doherty
RCOLeinster@swimireland.ie Fionnuala O'Neil
RCOMunster@swimireland.ie Leonie Galland
RCOUlster@swimireland.ie Martin Egan