



Capacity Planning & Monitoring System (CPMS) Registration Guide

Version 1.0
26/9/2022



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Version Control

Version	Author	Date	Notes
1.0	Richard Disley-Jones	3/8/2022	First draft

1. Background

The Capacity Planning & Monitoring System (CPMS) was developed by NECS and implemented in September 2022.

The system allows bed availability (or the availability of non-inpatient 'sessions') to be recorded at individual bed level. Organisations or individuals searching for a bed can then use the system search facilities to query this information in order to locate suitable capacity.

CPMS replaces the following systems:

- CAMHS Bed Availability System
- WebBeds (Perinatal)

In addition, the system introduces the ability to create and maintain strategic bed plans (or non-inpatient capacity) for all Specialised Mental Health (SMH) services.

2. General Information

The system is accessed at <http://www.cpms.necsu.nhs.uk>.

Prospective system users can register for access to the system by clicking on the 'Create an account' button. Depending on the access requested, the registration request will be routed to one or more designated approvers.

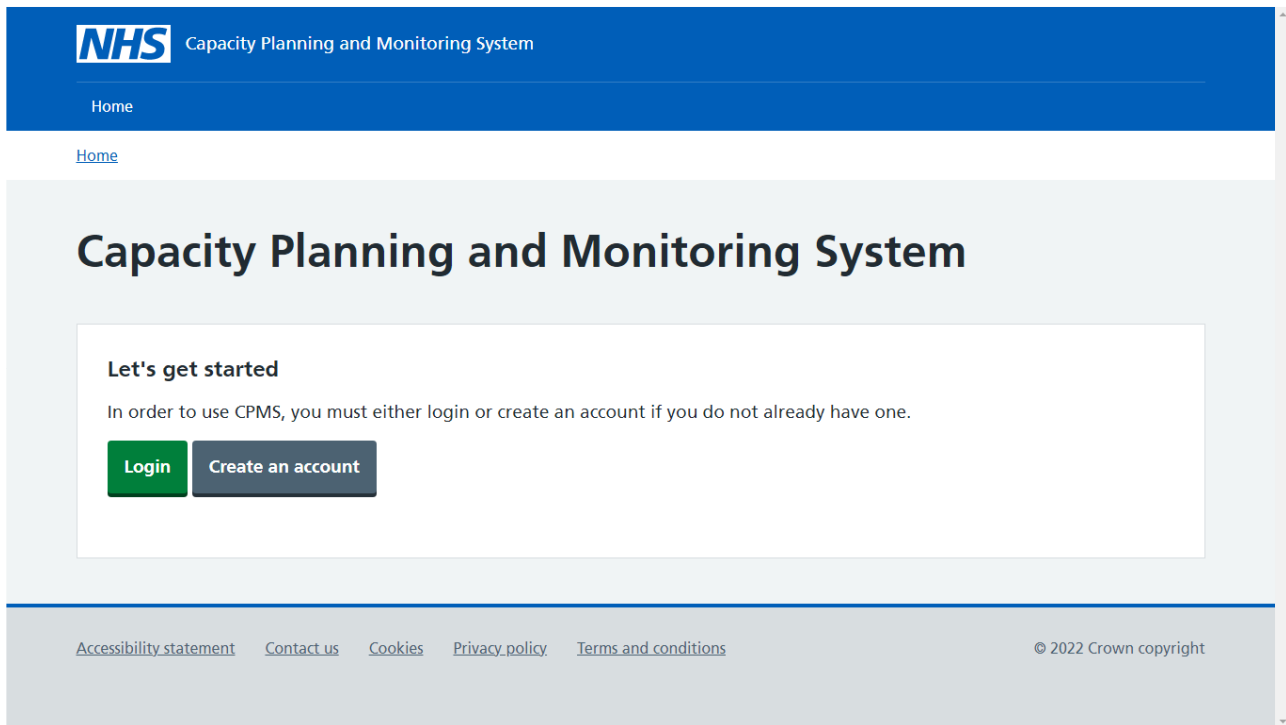
If you require any assistance, please contact the Specialised Mental Health (SMH) Helpdesk at smh.helpdesk@nhs.net. Helpdesk support is available 8:30 to 16:30 Monday to Friday.

3. Creating a User Account

3.1 Registration Part 1

When first launching the system, you are presented with the screen below. From here you can create a new account (if you don't already have one) by clicking on the 'Create an account' button.

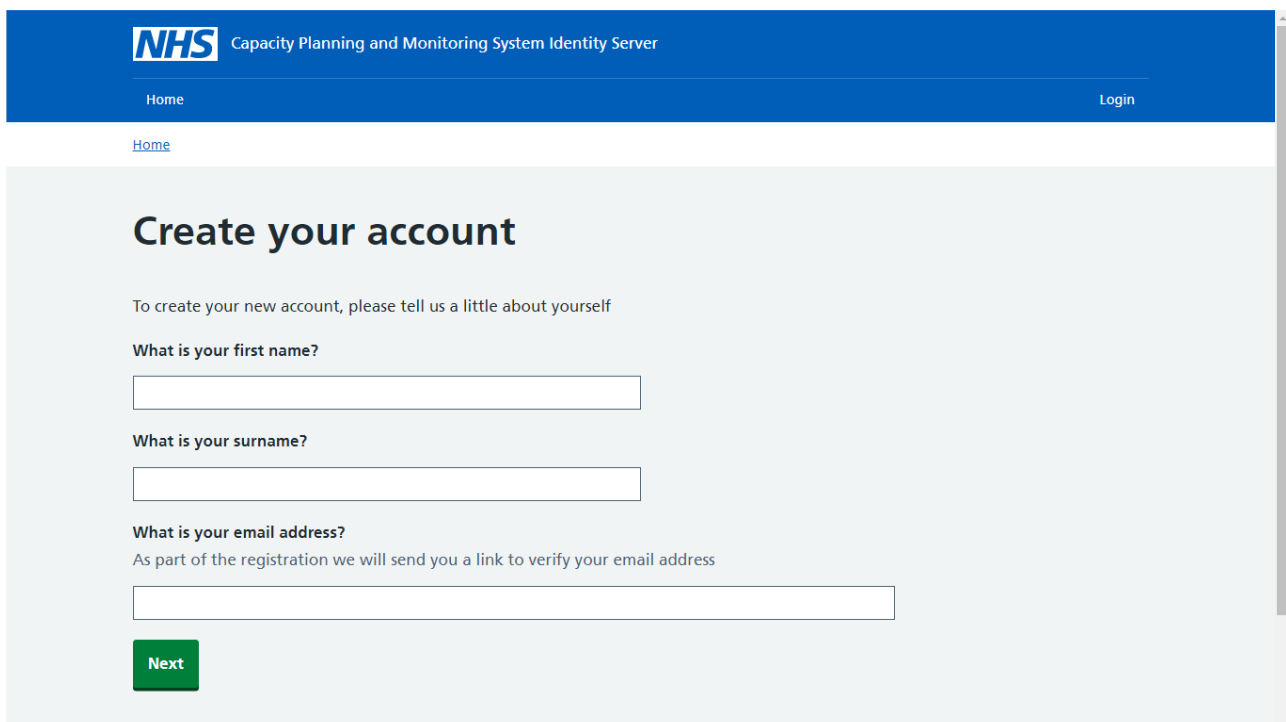
Fig 1



The screenshot shows the NHS Capacity Planning and Monitoring System login page. The header is blue with the NHS logo and the text 'Capacity Planning and Monitoring System'. Below the header is a navigation bar with a 'Home' link. The main content area has a large heading 'Capacity Planning and Monitoring System' and a section titled 'Let's get started'. This section contains the text 'In order to use CPMS, you must either login or create an account if you do not already have one.' and two buttons: 'Login' (green) and 'Create an account' (dark grey). The footer is light grey and contains links for 'Accessibility statement', 'Contact us', 'Cookies', 'Privacy policy', and 'Terms and conditions', along with the copyright notice '© 2022 Crown copyright'.

The following screen will then be displayed:

Fig 2



The screenshot shows the NHS Capacity Planning and Monitoring System Identity Server 'Create your account' page. The header is blue with the NHS logo and the text 'Capacity Planning and Monitoring System Identity Server'. Below the header is a navigation bar with 'Home' and 'Login' links. The main content area has a large heading 'Create your account' and the text 'To create your new account, please tell us a little about yourself'. There are three form fields: 'What is your first name?', 'What is your surname?', and 'What is your email address?'. Below the email field is the text 'As part of the registration we will send you a link to verify your email address'. A green 'Next' button is at the bottom of the form. The footer is light grey and contains the text 'NHS England and NHS Improvement'.

Enter all requested fields then click 'Next'. The following screen will be displayed.

Fig 3

NHS Capacity Planning and Monitoring System Identity Server

Home Login

[Home](#)

Create your account

Details about where you work

What is your job title? (optional)

What is your organisation postcode?

What is the postcode of the place you work?

Previous Next

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Entry of job title is optional, but the organisation postcode must be entered. This is used as the default location when searching for availability. To move to the next page, click 'Next'. The following screen will then be displayed.

Fig 4

NHS Capacity Planning and Monitoring System Identity Server

Home Login

[Home](#)

Create your account

What would you like your password to be?

The password must be at least 8 characters long. It must also contain at least 1 upper case letter, at least 1 lower case letter, at least 1 number and at least 1 special character

Please confirm your password by typing it again

Previous Next

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Enter the required password corresponding to the minimum entry requirements:

- At least 8 characters.
- At least 1 upper case letter.
- At least 1 lower case letter.
- At least 1 special character.

Click 'Next' to display a summary of the information entered, as per the example below.

Fig 5

The screenshot shows the 'Create your account' page of the NHS Capacity Planning and Monitoring System Identity Server. The page has a blue header with the NHS logo and the text 'Capacity Planning and Monitoring System Identity Server'. Below the header is a navigation bar with 'Home' and 'Login' links. The main content area is light blue and contains the title 'Create your account'. Below the title is a form with five rows of user details, each with a 'Change' button to its right:

First Name	Richard	Change
Surname	Test1	Change
Email Address	rdjtest1@co.ukk	Change
Job Title	Technical Lead	Change
Postcode	CH61 4XR	Change

Below the form is a checkbox labeled 'I confirm my details are correct' and a green 'Register' button.

If you're happy that the details are correct, tick the 'I confirm my details are correct' box and click the 'Register' button. If you need to amend any details first, click on the 'Change' button alongside the relevant piece of information.

Before you can enter further registration information, an automated email is forwarded to the entered email address, similar to the one below. This is to verify that a valid email address has been entered.

Fig 6

From	Capacity Planning and Monitoring System
Reply to	smh.helpdesk@nhs.net
To	rdjtest1@co.ukk
Subject	NECS CPMS Account Registration
<p>Hi Richard,</p> <p>Thank you for registering to CPMS.</p> <p>To complete your registration please confirm your email address by clicking the following link :</p> <p>https://cpmsdev-identity.azurewebsites.net/Onboarding/Registration/ConfirmEmail/?userId=d24300c2-1c93-4544-bd16-b988d6e4f597&client=cpms&token=CfDJ8B60uRegvi1EvZAOVDPi1rirvH88taE1y2%2fvmx%2fMB6hkRMzwPpUSUejg9brC9Tu79k4KDLrHfERyWJqwxVRAINRZgYRjgXHfOr7g3iVPujnWyMp83kRL4eTrpRQwnTbv2pyLdAFfn7GXq4xDddyGXphnk0h2U9zFRVZqFW1u%2b8z4US91%2f5xUNXyHBmWtk3aa%2f7SSa7%2f1zKpzi6zzQs0YKezDRAXC6aKZbhK9QWH49ycvDULI7C8a6BmC52ufPfw%3d%3d</p> <p>If you have any issues please contact the CPMS Service Desk.</p> <p>T: 01234 567890 E: support@placeholder.info</p> <p>Kind Regards, CPMS Support Team</p>	

To complete registration, click on the link in the email. You will then be taken back to the screen in Fig 1 above. Click on the 'Login' button to open up the login form as shown below.

3.2 Registration Part 2

Fig 7

The screenshot shows the NHS Capacity Planning and Monitoring System Identity Server login interface. The header is blue with the NHS logo and the text 'Capacity Planning and Monitoring System Identity Server'. Below the header, there are links for 'Home' and 'Administration', and the user name 'Richard Test1'. The main content area is light gray and contains a white login box. Inside the box, the title 'Login' is at the top. Below it, the text 'What is your email address?' is followed by a text input field containing 'rdjtest1@co.uk'. Below this, the text 'Password' is followed by a password input field with masked characters. There is a checkbox labeled 'Remember your login details?' which is checked. At the bottom of the box are two buttons: 'Login' (green) and 'Cancel' (gray). Below the box, there is a link for 'Forgotten password?'.

Enter your email address and password chosen in Fig 4. To retain your login details to remove the need for re-entry in the future, tick the 'Remember your login details?' box. Click the 'Login' button. The registration process will then continue, beginning with the screen below.

Fig 8

The screenshot shows the NHS Capacity Planning and Monitoring System registration interface. The header is blue with the NHS logo and the text 'Capacity Planning and Monitoring System'. Below the header, there is a link for 'Home' and the user name 'Richard Test1'. The main content area is light gray and contains a white registration box. Inside the box, the title 'Registration' is at the top. Below it, the text 'Organisation Details' is followed by the text 'Your Organisation'. There are three radio button options: 'Provider / Provider Collaborative', 'NHS England', and 'Other'. Below this, the text 'Required Access' is followed by two questions. The first question is 'Do you require bed/session availability access?' with 'Yes' and 'No' radio button options. The second question is 'Do you require bed/capacity plans access?' with 'Yes' and 'No' radio button options. At the bottom right of the box is a green 'Next' button.

Under 'Organisation Details', 'Your Organisation', chose the most appropriate option as follows:

- **Provider / Provider Collaborative**

If you are employed by an SMH provider and/or are aligned to a provider collaborative, choose

this option.

- **NHS England**

If you are employed directly by NHS England – at a national level or for a specific region – choose this option.

- **Other**

If neither of the above apply, choose this option.

If you choose 'Provider / Provider Collaborative', you will be prompted to select your provider from a dropdown as shown below.

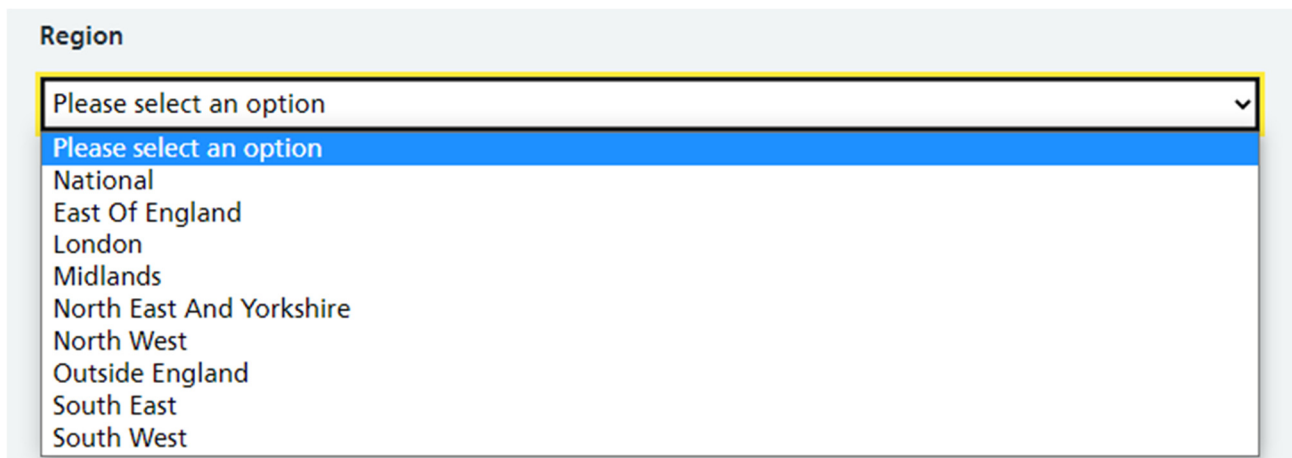
Fig 9



The screenshot shows a form titled "Your Provider" with a dropdown menu. The dropdown menu is currently closed and displays the text "Please select an option" with a downward arrow icon on the right side.

If you choose 'NHS England', you will be prompted to select your region (or 'National') from a dropdown as shown below.

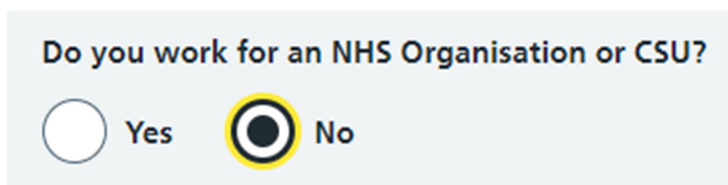
Fig 10



The screenshot shows a form titled "Region" with a dropdown menu. The dropdown menu is open, displaying a list of options: "Please select an option", "National", "East Of England", "London", "Midlands", "North East And Yorkshire", "North West", "Outside England", "South East", and "South West". The "Please select an option" text is highlighted in blue.

If you choose 'Other', you will initially be presented with the prompt below.

Fig 11



The screenshot shows a form titled "Do you work for an NHS Organisation or CSU?". Below the title are two radio buttons. The "Yes" radio button is unselected, and the "No" radio button is selected, indicated by a black dot in the center of the circle.

If you are employed by an NHS organisation other than NHS England, or by a commissioning support unit, click 'Yes', otherwise click 'No'. Depending on your response, some or all of the items below will be requested.

Fig 12

Organisation Name

Contact Address

Further Contact Information, e.g. mobile number (in case we need to contact you regarding your application) (optional)

If you responded 'Yes' to the prompt in Fig 11, only your 'Organisation Name' will be requested. If you responded 'No', the additional items will be requested to assist with the approval process.

You will then be required to select the required options under 'Required Access' in Fig 8, to indicate whether you require access to either or both of:

- The bed (and session) availability features of the system (prompt 'Do you require bed/session availability access?')
- The strategic bed (and capacity) plan features of the system (prompt 'Do you require bed/capacity plans access?')

After all information has been entered, click 'Next'. If you requested access to the bed availability features of the system, the screen below will be displayed.

Fig 13

NHS Capacity Planning and Monitoring System
Richard Test1

Registration

Bed/Session Availability

Access required for Service Groups

☒ CAMHS

Do you require 'edit access', i.e. do you need to be able to update bed/session availability information?

☐ Yes ☒ No

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The check box under 'Access required for Service Groups' is disabled and automatically set to 'CYPMHS' only at the present time. This is because initially only CYPMHS users will be able to register for access to bed availability features. All Perinatal users will be pre-registered.

Nationwide 'search availability' access is granted by default. If you also need to update bed availability for one or more providers, units or wards, click on 'Yes' under 'Do you require edit access?'. Further detail will then be requested as shown in the example below.

Fig 14

The screenshot shows a user interface for selecting access locations. It consists of three sections, each with a dropdown menu and an 'Add' button (a green circle with a white plus sign followed by the text 'Add').

- Organisation:** The dropdown shows 'Please select an organisation'. Below it, the text 'The Huntercombe Group' is displayed with a blue 'Remove' link.
- My Units:** The dropdown shows 'Please select a unit'. Below it, the text 'The Huntercombe Group: Huntercombe Hospital - Maidenhead' is displayed with a blue 'Remove' link.
- My Wards:** The dropdown shows 'Please select a ward'. Below it, the text 'The Huntercombe Group: Huntercombe Hospital - Maidenhead: CAMHS-Kennet- ED' is displayed with a blue 'Remove' link.

In this section, you can select the providers, units or wards for which you need to update bed availability. In the example above, I've selected access to a single ward 'CAMHS – Kennet – ED' in Huntercombe Hospital Maidenhead.

Begin by selecting the relevant organisation (provider) from the first dropdown, then clicking 'Add' to add it to the list of access required. If you require edit access for all units in an organisation, there is no need to select anything from the other dropdowns. However, if you only require access to a single unit or a single ward, select these as appropriate and click 'Add' each time. As many organisations, units or wards as required can be selected.

Once you have completed this section, click 'Next' to continue.

If you requested access to the bed plan features of the system, the screen below will be displayed.

Fig 15

The screenshot shows the 'Registration' page of the NHS Capacity Planning and Monitoring System. The page has a blue header with the NHS logo and the text 'Capacity Planning and Monitoring System'. Below the header, the user's name 'Richard Test1' is displayed.

The main content area is titled 'Registration' and 'Bed/Capacity Plans'. Under 'Service Group', there are two radio buttons: 'Adult Secure' (which is selected) and 'CAMHS'. At the bottom of the main content area, there are two green buttons: 'Previous' and 'Next'.

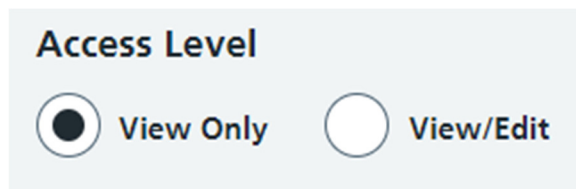
The footer contains links for 'Accessibility statement', 'Contact us', 'Cookies', 'Privacy policy', and 'Terms and conditions', followed by the copyright notice '© 2022 Crown copyright'.

At the present time, this functionality is available for Adult Secure and CYPMHS services. Further

services will be added in due course.

To request access to bed plans for specific services, first select the relevant Service Group. You will then be prompted to choose 'View Only' access or 'View/Edit' access as below.

Fig 16



The image shows a section titled "Access Level" with two radio button options. The first option, "View Only", is selected with a filled black circle. The second option, "View/Edit", is unselected with an empty white circle.

As the name suggests, 'View Only' access will not permit you to make any changes to bed plans.

If you select 'View/Edit', you will be asked to confirm which Provider Collaborative's plans you need to be able to edit.

Fig 17



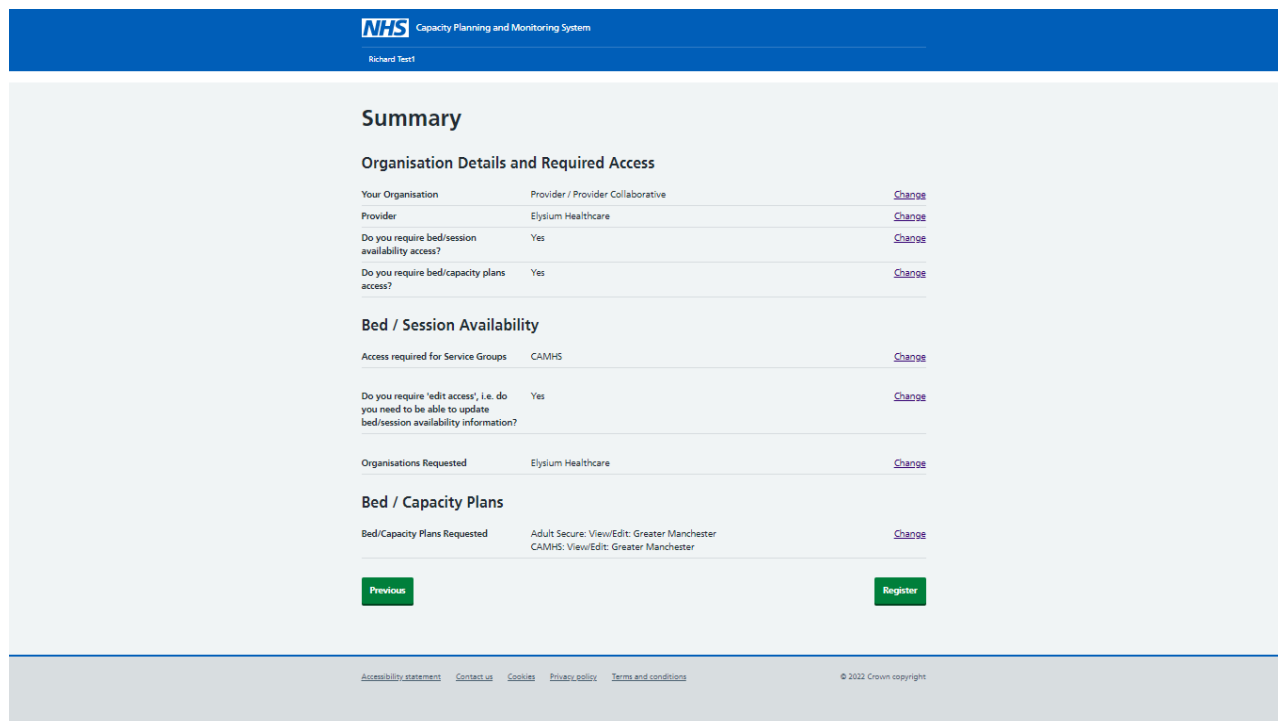
The image shows a section titled "Provider Collaborative" with a dropdown menu. The text inside the dropdown is "Please select a provider collaborative". A small downward arrow is visible on the right side of the dropdown box.

After completing the above information, click the 'Add' button to add this request to the list of access required. To request additional bed plan access, repeat the above process as required.

Once you have completed this section, click 'Next' to continue.

You will then be presented with a summary of the information you have entered, and access you have requested, as per example below.

Fig 18



The image shows a summary page titled "Summary" under the "NHS Capacity Planning and Monitoring System" header. The page is divided into several sections, each with a table of details and a "Change" link.

Organisation Details and Required Access		
Your Organisation	Provider / Provider Collaborative	Change
Provider	Elysium Healthcare	Change
Do you require bed/session availability access?	Yes	Change
Do you require bed/capacity plans access?	Yes	Change

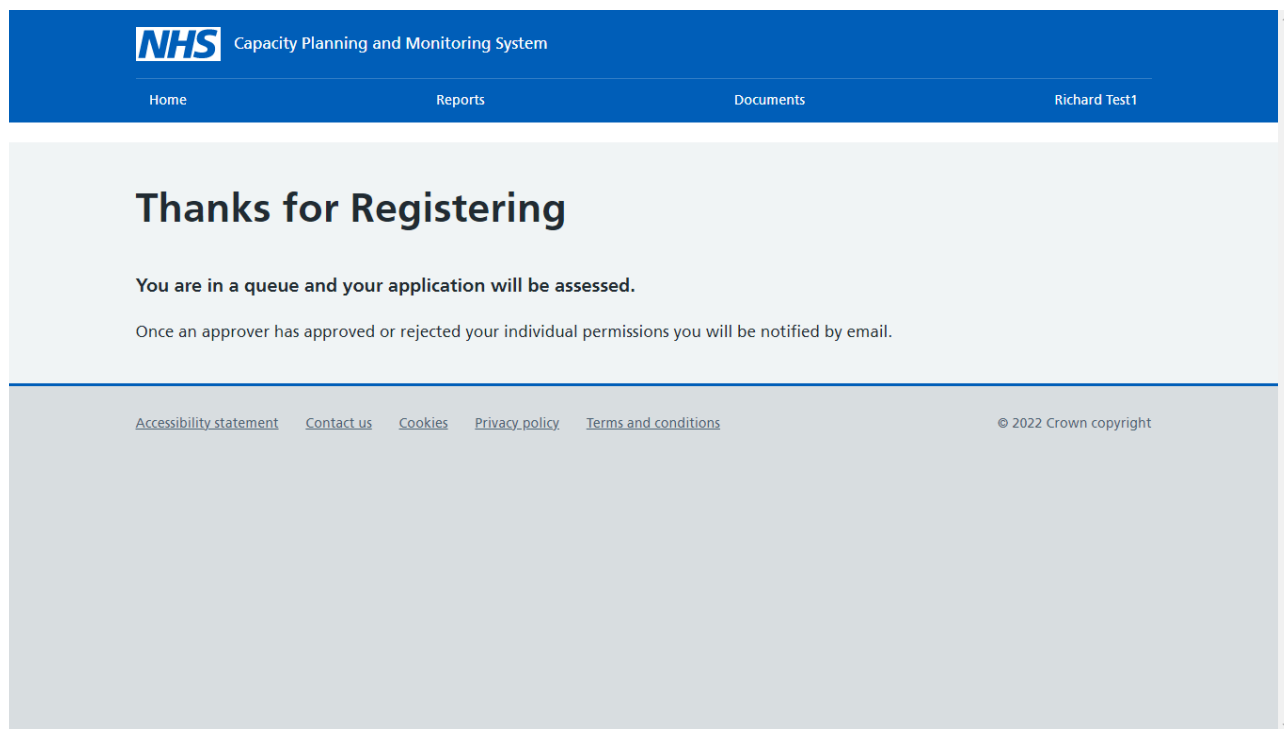
Bed / Session Availability		
Access required for Service Groups	CAMHS	Change
Do you require 'edit access', i.e. do you need to be able to update bed/session availability information?	Yes	Change
Organisations Requested	Elysium Healthcare	Change

Bed / Capacity Plans		
Bed/Capacity Plans Requested	Adult Secure: View/Edit: Greater Manchester CAMHS: View/Edit: Greater Manchester	Change

At the bottom of the summary page, there are two green buttons: "Previous" and "Register".

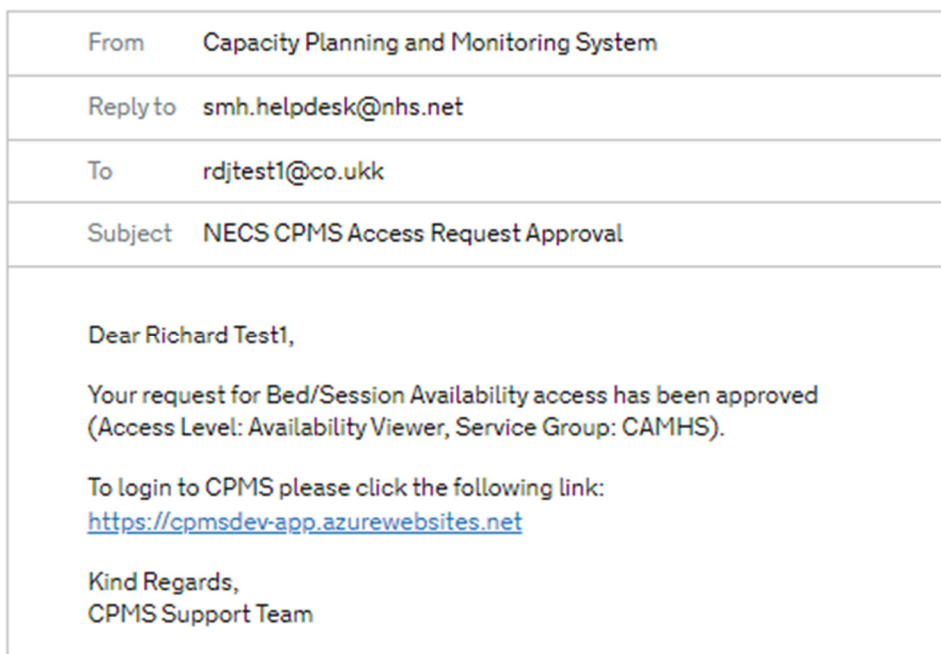
If you are happy with the details, click the 'Register' button to submit the registration request, If you need to change anything, click on the 'Change' link alongside the relevant item. The message below will then be displayed.

Fig 19



Depending on the access requested, your application will be routed to one or more approvers for authorisation. Once authorised (or in the event that your request is declined), you will receive an e-mail by way of confirmation. An example approval email is shown below.

Fig 20

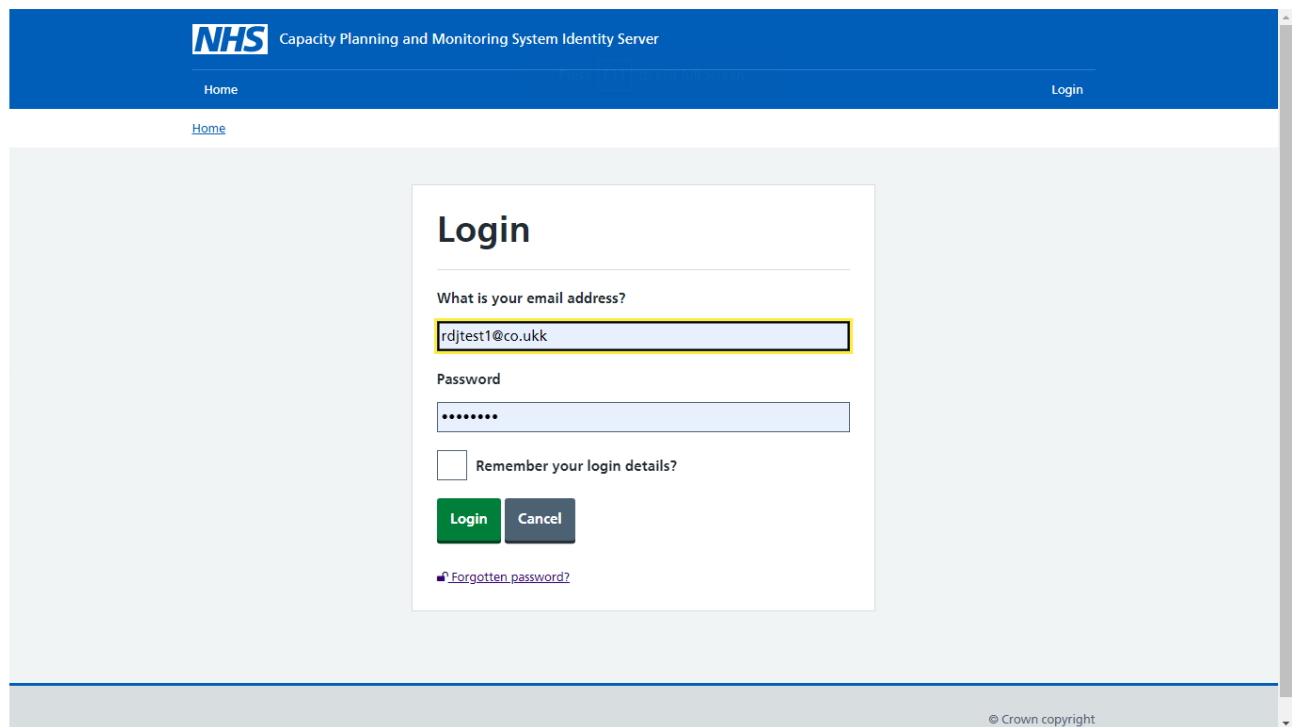


Note that if you request access to different system areas, organisations, etc., access may be granted at different times, so you may find some restrictions until all access requests have been authorised.

3.3 Logging in to The System

Once your account has been approved, navigate to the system at <http://www.cpms.necsu.nhs.uk>. The page in Fig 1 will be shown. Click on 'Login' to navigate to the logon screen shown below.

Fig 21



The screenshot shows the login interface for the NHS Capacity Planning and Monitoring System Identity Server. The page has a blue header with the NHS logo and the text 'Capacity Planning and Monitoring System Identity Server'. Below the header, there are links for 'Home' and 'Login'. The main content area is light gray and contains a white login box. Inside the box, the title 'Login' is at the top. Below it, the text 'What is your email address?' is followed by a text input field containing 'rdjtest1@co.ukk'. Below that, the text 'Password' is followed by a password input field with masked characters. There is a checkbox labeled 'Remember your login details?'. At the bottom of the box are two buttons: 'Login' (green) and 'Cancel' (gray). Below the box, there is a link for 'Forgot your password?'. The footer of the page is gray and contains the text '© Crown copyright'.

Log into the system by entering your email address and password and hitting the 'Login' button. If you wish your login details to be retained to avoid the need to enter them each time, click the 'Remember your login details?' box.

After logon, you will be presented with a home page containing a number of tiles corresponding to your level of access.