



# Administration

## Cloning an EHCP Form Definition

Instances of the Education, Health and Care Plan (EHCP) forms can be created to record and complete a student's EHCP. Capita One has provided an EHCP form definition template for you to clone. This is the recommended method to create a student's EHCP form.

A student's EHCP form must be signed off before it is complete. It is then locked for editing, but it can be unlocked by the signatories, if required, and another version created.

If you wish to design a new form definition according to your local authority's requirements, see *RG\_Administration\_Creating EHCP Form Definitions*.

### Cloning an EHCP Form Definition

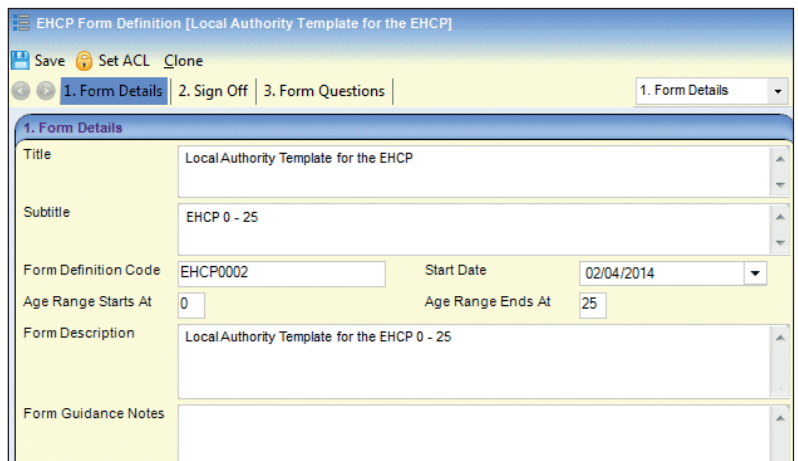
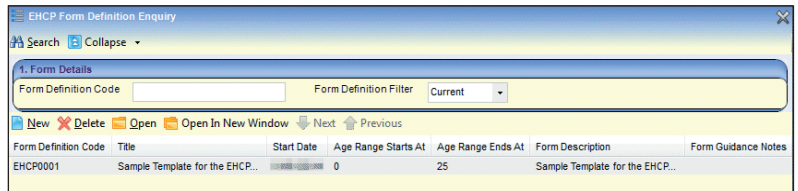
To clone the One EHCP form definition:

1. Select **Tools | Administration | Form Builder | EHCP Forms | EHCP Form Definitions** to display the **EHCP Form Definition Enquiry** page.
2. Click the **Search** button to display the sample template for the EHCP in the browse list.
3. Open the sample template to display the **EHCP Form Definition [Sample Template for the EHCP Plan]** page.
4. Click the **Clone** button to open a new, editable version of the sample template.
5. On the **Form Details** panel, enter the details relative to your local authority.

The **Form Definition Code** must be unique for each template. One regards EHCP templates with the same Form Definition Code as the same, and only the template with the most recent start date is available for selection in a student's chronology.

One does not allow an EHCP Form Definition Code to start with Z; this is used for ICS Form Definitions.

6. Click the **Save** button to save your **EHCP Form Definition [Name of Template]**.



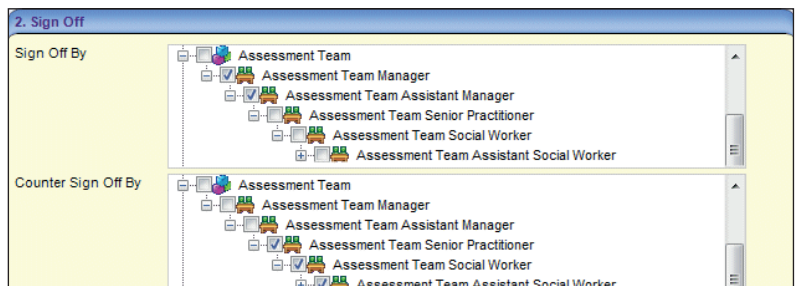
Once a template has been used to create a student's EHCP form, it becomes read-only. To amend a template, create a new cloned version and make the required changes. This cloned template supersedes the previous version, providing you do not change the Form Definition Code.

### Assigning Posts for Sign Off

The **Sign Off** panel is used to assign posts of One users who are responsible for digitally signing or counter signing a student's EHCP form.

To assign posts to **Sign Off By** and **Counter Sign Off By**:

1. Click the plus signs to open the navigation tree.
2. Select the required posts.
3. Click the **Save** button.





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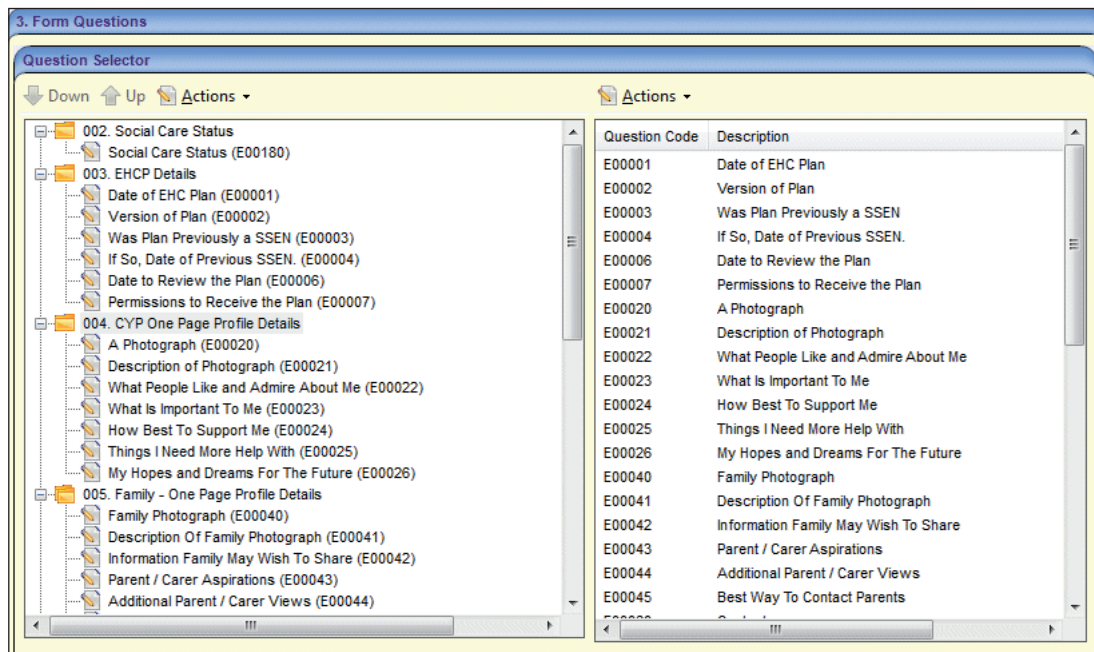
### Viewing the Form Questions

The **Form Questions | Question Selector** panel is the foundation of the EHCP form template. The questions and the question groups on the cloned template are displayed in the recommended order, but these can be changed. For more information, see *RG\_Administration\_Creating EHCP Form Definitions | Defining EHCP Form Questions*.

The full list of EHCP question definitions can be viewed via **Tools | Administration | Form Builder | EHCP Forms | EHCP Question Definitions**. For more information, see *RG\_Administration\_Viewing EHCP Question Definitions*.

The left pane of the panel is pre-populated with the sample EHCP form questions. Each question has been added to a group. The group number relates to the header on the EHCP form. The question groups start with 002, as the first question is always the subject details.

The right pane of the panel is pre-populated with the sample EHCP form questions. Each question relates to a field within a panel on the EHCP form. A question code can only be used once on a form.



If you do wish to make any changes, clicking the **Actions** button on the left pane enables you to:

- Edit Group
- Delete Group
- Delete Question From Group.

If you do wish to make any changes, clicking the **Actions** button on the right pane enables you to:

- Create New Question
- Add Question to Form
- Add Question to New Group on Form.



#### Related Reference Guides:

- [RG\\_Administration\\_Creating EHCP Form Definitions](#)
- [RG\\_Administration\\_Viewing EHCP Question Definitions](#)