



Services | EHCP Administration

EHCP User Defaults

The Education, Health and Care Plan (EHCP) requires the following areas to be set up by a system administrator:

- EHCP User Defaults.
- EHCP Configuration - For more information, see *RG_Services_EHCP Administration_Configuration*.
- EHCP Review Type Setup - For more information, see *RG_Services_EHCP Administration_Review Type Setup*.

The **EHCP User Defaults** page enables you to define the default persons against each of the roles required for the EHCP Assessment Form. These names are specific to your User ID and Service Team. It is not mandatory to define all the roles.

Once defined, the names will automatically populate the **EHCP Assessment Involvement - EHCP Professional Contacts** fields on the EHCP Assessment Involvement.

Permissions are set up via **Tools | Permissions | User Group Processes | CSS Administration Main Business Process**.

Defining EHCP User Defaults

To define the EHCP user defaults:

1. Select **Focus | Services | EHCP Administration | EHCP User Defaults** to display the **EHCP User Defaults** page.
2. Select the required people on the **EHCP Assessment User Defaults** panel.

The screenshot shows the 'EHCP User Defaults' window. The 'User Name' field is populated with '(i) System Administrator'. The 'Assessment Officer', 'Administrative Officer', 'Medical Officer', and 'Social Services' fields each have a search icon and a list of user icons. The 'Communication Log Sender' dropdown is set to 'Assessment Officer'. Callouts provide instructions: 'The User Name is automatically populated.', 'Click the Assessment Officer (Caseworker label) browse to display the Choose a Caseworker dialog. Available caseworkers are grouped by service team and post.', 'Click the Administrative Officer browse to display the Select Administrative Officer dialog. Available administrative officers are grouped by service team and post.', 'Select the Communication Log Sender from the drop-down list.', 'Click the Medical Officer browse to display the Select: Medical Officer dialog.', and 'Click the Social Services browse to display the Select: Social Services dialog.'

3. Click the **Save** button.

Related Reference Guides

- *RG_Services_EHCP Administration_EHCP Review Type Setup*
- *RG_Services_EHCP Administration_EHCP Configuration*
- *RG_Involvements_Creating an Involvement Record*
- *RG_Involvements_Creating an Involvement Form*