Administration
Creating a SEND Professional Portal Form Definition

The Special Educational Needs and Disability (SEND) Professional Portal enables professionals to submit forms via the One Professional Portal on behalf of a child or young person.

The forms are created using the SEND Portal Form Builder in the v4 Client. The form builder functionality enables each local authority to define questions to be used in form definitions, according to their own individual requirements.

A form must be marked as **Live** for it to display on the Professional Portal. When a SEND Portal form is viewed via the Professional Portal, the title is always prefixed with **Special Educational Needs & Disabilities**.

The **SEND Portal Management** functionality is available in the v4 Client via **Focus | Services** to enable local authority teams to view filtered lists of the portal applications and the details of each application.

The forms are available on the child's chronology when they have been approved by the local authority.

The **SEND Portal Form Definitions** are created in the v4 Client via **Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions**.

Creating a New SEND Professional Portal Form Definition

To create a new SEND Professional Portal form definition:

1. Select **Tools | Administration | Form Builder | SEND Portal Forms | Form Definitions** to display the **SEND Portal Form Definition Enquiry** page.

2. Click the **New** button to display the **SEND Portal Form Definition** page.

   A note is displayed at the top of the **Form Details** panel informing you that the title of this form will always be prefixed with 'Special Educational Needs & Disabilities'.

3. On the **Form Details** panel, enter a **Title**.

4. Enter a **Subtitle**.

5. Enter a **Form Definition Code**. The **Form Definition Code** must be unique for each SEND Portal form definition.

6. If you want the form to be displayed on the Professional Portal, select the **Live** check box.

7. Select the **Portal Type**, i.e. Professional Portal

   The **Portal User Type** is not used for the Professional Portal.

8. Enter the **Form Description**.

9. If required, enter the **Form Guidance Notes** to assist the user filling in the form; this information can be printed on the SEND Portal form. For more information, see *RG_Administration_Printing SEND Portal Forms*.

10. Click the **Save** button.

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Defining SEND Portal Form Questions

The **Form Questions | Question Selector** panel is the foundation of the SEND Portal form template.

The right pane of the panel is pre-populated with some sample SEND Portal form questions. These can be used to create your SEND Portal form template, or you can define new questions. Education, Health and Care Plan (EHCP) questions can be used on the SEND Portal questions.

Each question relates to a field within a panel and each question <u>must</u> belong to a group; the panel heading.

> Click the column heading to sort by **Question Code** or **Description**.

To define a new question:

1. Click the **Actions** button on the right pane, then select **Create New Question** to display the **SEND Portal Question Definition** dialog.

2. On the **Question Information** panel, enter a <u>unique</u> **Question Code**.

3. Enter a **Description**.

4. Select a **Data Type**; this controls how the question is displayed on the form.

Text	Integer Number
Date	Decimal Number
Yes/No	Image

5. If required, select the **Memo** check box.

6. On the **Question Restrictions** panel, define a maximum character length for the answer.

7. If required, select **Answer is spell checked**.

8. If required, select **Answer is Mandatory**.

9. If required, select **Answer appears on the Chronology**.

10. If required, select **Answer is constrained**. This only allows the answer to be in a specific format.

11. If the answer <u>is</u> constrained, enter the list of items to display as a drop-down list on the form.

12. If required, select **Answer can be inherited multiple times**.

13. Click the **Save** button; the new question displays at the bottom of the list of questions.

To create additional questions, repeat the process.
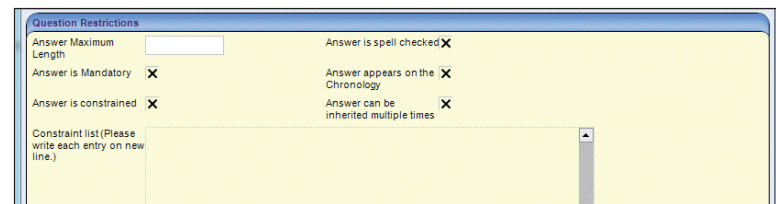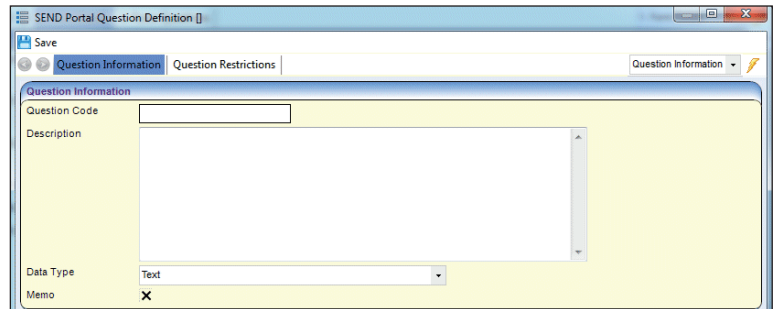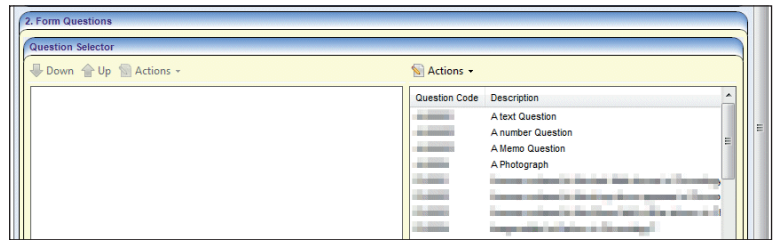
> **Answer can be inherited multiple times**.
>
> Selecting this check box enables multiple questions/answers with the same **Question Code** to be selected for inclusion in the chronology.
>
> It is advisable that this is not used with the 'repeating groups' functionality.

Adding Questions to Groups

To add the first question to a group:

1. On the right pane of the **Question Selector** panel, highlight a question, then click the **Actions** button and select **Add Question To New Group On Form** to display the **New Group [New Group]** dialog.

2. Enter a **Data Group Name**; this is the header of the panel.

3. If required, enter the **Data Group Guidance Notes**; these display above the panel.

4. Enter the **Number on Form**; panel number 1 is used for the **Student Details** panel.

5. Select **Does the group repeat** to create additional panels of the same question, e.g. People Involved.

6. Click the **Save** button to add the question and the group to the left pane.
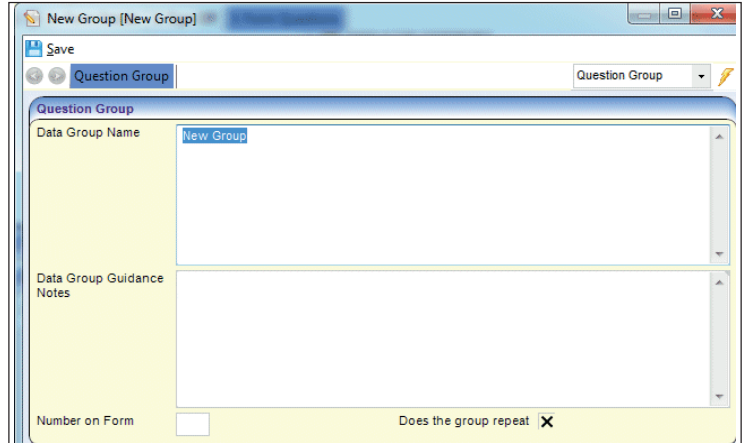
It is not advisable to use **Does the group repeat** with **Answer can be inherited multiple times**.

To add subsequent questions to a group:

1. On the left pane, highlight the group folder.

2. On the right pane, highlight a question, then click the **Actions** button and select **Add Question to Form**.

3. Repeat steps 1 and 2 until all the required questions and groups are displayed in the left pane.

4. Click the **Save** button.
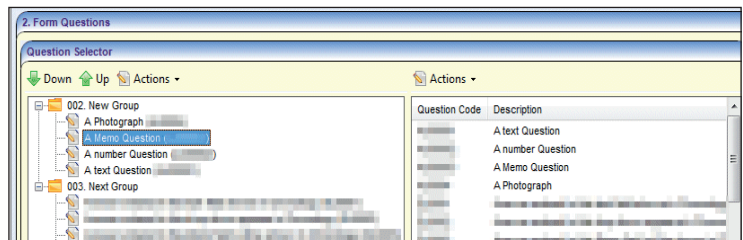
> If you wish to change the position of a question in a group, highlight the question in the left pane and click the **Up** or **Down** button.
>
> To move a question to a different group, it must be deleted from one group before it can be added to another group.
>
> Questions can also be added to a group by using drag and drop.

Editing a Group

To edit a group:

1. Highlight a group folder, then click the **Actions** button and select **Edit Group** to display the **Question Group** dialog.

2. Make the changes to the required fields.

   If you change the **Number on Form** field, i.e. the panel number, you are prompted with a message that all subsequent groups will be renumbered and you are advised to double-check all group numbers.

3. Click the **OK** button.

Related Reference Guides:
- RG_Administration_Cloning SEND Portal Form Definitions
- RG_Administration_Printing SEND Portal Form Definitions