



Children's Services Quick Guide

Using 'Copy From'


When recording an individual workstep for a child, it is possible to copy the content over to the same workstep on a sibling record. This is called the Copy From function. An example of when Copy From could be used would be if a worker has been allocated worksteps on siblings that have not yet been grouped. This means that the worker wouldn't have to record the information twice. Instead, the worker will only need to record the information once and then copy it over to the sibling's workstep. In most circumstances, the worker can ask for the step to be grouped before completing any steps individually, this will remove the need to use Copy From. If the workstep can be grouped, please speak to your Line Manager to arrange this to happen. Some workflows are not group enabled such as Family Time, meaning Copy From may be a suitable option if work is being done with siblings.

Please Note: Once the content of the workstep has been copied over, the worker **MUST** ensure that they edit the information so that it applies to the individual child.

Once you have recorded the content of the workstep for sibling 1, navigate to the same workstep in the record of sibling 2.

- Click the  copy from icon from the toolbar at the top of the form.
- Select the name of the sibling you wish to copy from out of those listed in the Relations and co-inhabitants drop down menu.
- The List window will display. Click the  copy icon on the right-hand side of the document you wish to copy from.

Please Note: If multiple forms appear in the list, you must ensure you are selecting the correct form by checking such details as the start and completion dates.

The data from all sections of the form will copy from the document you have selected. The only information that will not copy over is the Actions taken and any requests sent via the  requests icon. This information will have to be manually input onto the sibling's form you are copying to.

Once all information has been thoroughly checked for accuracy, the workstep that has been copied to can be saved and closed or finished.