

## OVERVIEW

Learner Template forms can be assigned to individual learners and can be completed multiple times, by creating instances of the form. The signatures can be customised to determine who completes the form, and in which order the form should be signed.

## USER RESTRICTIONS

Only learners, assessors, class form delegates and centre managers can be included in the form signatures.

## DETAILS

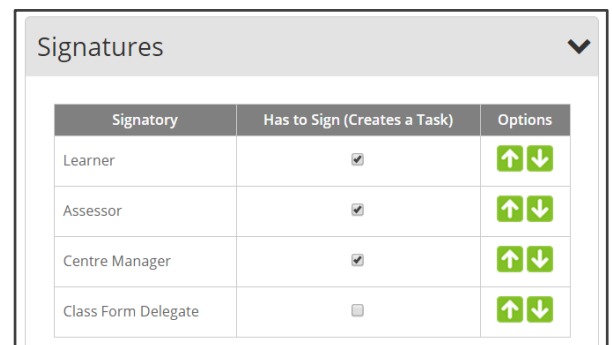
### Configuring the Form

Learner Template Forms need to be configured to specify which users and in what order they should sign the form. To do this, follow the steps below:

1. Click on the **Centre** icon and then the **Forms** icon
2. Click the **Open** button of the learner template form

If you haven't yet set the form as a "Learner Template", click on **Publish: off**, select **Learner Template** and click **Save**.

3. Scroll to the **Signatures** section at the bottom of the page
4. Tick the checkboxes of the users that are required to sign the form
5. Use the **Up** and **Down** icons to configure the order in which the form will be signed



| Signatory           | Has to Sign (Creates a Task)        | Options |
|---------------------|-------------------------------------|---------|
| Learner             | <input checked="" type="checkbox"/> | ↑ ↓     |
| Assessor            | <input checked="" type="checkbox"/> | ↑ ↓     |
| Centre Manager      | <input checked="" type="checkbox"/> | ↑ ↓     |
| Class Form Delegate | <input type="checkbox"/>            | ↑ ↓     |

**Important** – the user at the top of the signatory list is the person that will be able to complete the data entry of the form.

### Class Form Delegate

The class form delegate is an extension to the Centre Monitor account, which is done by assigning the **Class Form Delegate permission** to the Centre Monitor. Once the user is set up as a Class Form Delegate, you can specify which classes the Centre Monitor will be the Form delegate of. This is done in the **Quality** section, by editing the class and selecting the Class Form Delegate from the drop down list. The Class Form Delegate is the person responsible for signing the forms of all learners within the linked classes.

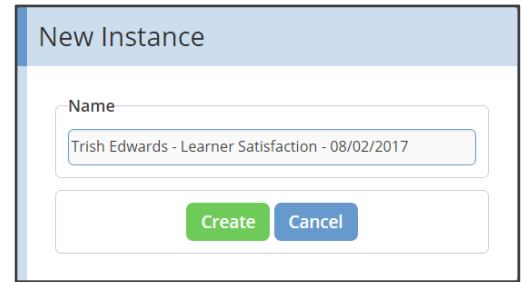
### Create New Form Instance

When the form has been assigned to a learner, the user at the top of the signatory list will see an icon on the learner's portfolio in the **Forms** tab.

# Learner Template Forms

To create a new instance or version of the Form, follow the steps below:

1. Open the learner's portfolio
2. Click on the **Forms** tab
3. Click on the icon of the relevant form
4. Click on the **Create new instance** button
5. Change the name, if required
6. Click the **Create** button



You will now see the fields of the form that have been created by the Centre Manager. Once all fields in the form have been completed, scroll to the bottom of the page, tick the checkbox to sign, and click the **Save** button.

Doing this will send a task to the next user in the list, where they will be able to see the entered data and sign.

You can easily see how many of the required signatures are present by looking at the colour of the boxes in the **Signatures** column.

| Form Name            | Learner Name | Instance Name                     | Date Created        | Date Modified       | Signatures  | Options              |
|----------------------|--------------|-----------------------------------|---------------------|---------------------|---|----------------------|
| Learner Satisfaction | Gemma Hall   | Trish Edwards - asdf - 09/05/2016 | 09/05/2016 13:10:23 | 09/05/2016 13:26:55 | <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: red;">■</span> <span style="color: red;">■</span> | <a href="#">Open</a> |