



Pecyn Cymorth Llywodraethu
Gwybodaeth Cymru
**Welsh Information Governance
Toolkit**

IGDC • DHCW

Welsh IG Toolkit

Copy Down Feature

Copy Down Feature

Copy down functionality has been made available within the Caforb platform for organisations who are set up in the Parent (Host) and Child relationship. The Parent and Child relationship refers to a Host organisation, where organisations sit underneath, these organisations are referred to as Child organisations.

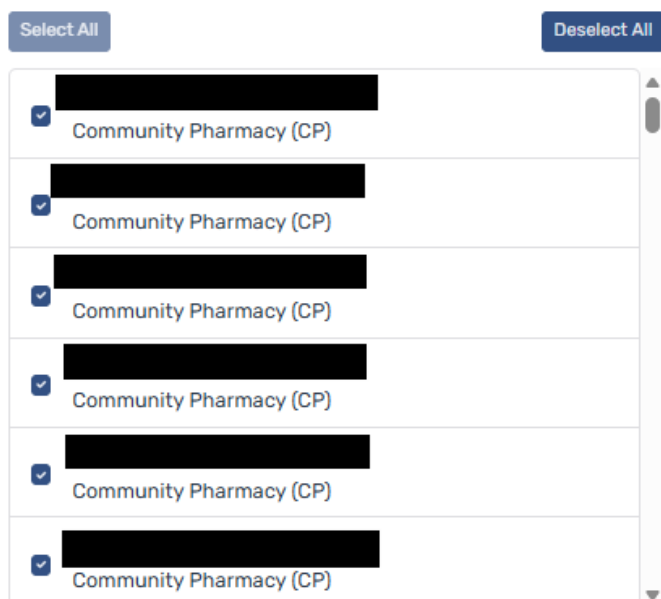
The Parent organisation typically provides strategic direction, policies and overall governance. While Child organisations may have its own operational autonomy and local deviations, they generally follow the overall direction set by the Parent organisation. However, each dynamic may be different.

The copy down feature enables the Parent organisation to copy down elements of their WIGTK form to their Child organisations. There is a choice of copying down the entirety of the form or only certain sections or even specific question down to the children. Where only certain sections or questions are copied down, this allows Child organisation to make local deviations to their own forms.

There is functionality within the copy down feature which allows you to select which child organisations to copy the information down to. All child organisations will automatically be selected.

You can choose to 'Deselect all' organisations, or alternatively, you can uncheck the individual child organisations the copy down is not applicable to by using the blue tick box next to the organisation name. Should you need to select all child organisations again, you can click the 'Select All' button.

Child Organisations



There is also an option for a post copy down action, in which the Parent organisation has the choice to either do nothing, submit their own form, submit their own and their Child organisations form or only submit for their Child organisations. Therefore, when using copy down, you will need to select one of the following four options under the post copy down action section:

- Nothing
- Try to submit Host form



- Try to submit all Child forms
- Try to submit Host and all Child forms

You will also have the option to select which controls to be copied down. You will need to select from the below options:

- All Controls (this copies down the entirety of the form)
- Specific Controls (All controls will be selected by default, but users will have functionality to de-select what sections or certain questions you do not wish to be copied down)

Copy down

Assigned Sections
Copy down

Copy down configuration for Community Pharmacies Parent (Demo) (2222A)

? What's this?

Post copy down action

Nothing

Try to submit Host form

Try to submit all Child forms

Try to submit Host and all Child forms

Which controls should be copied down?

All controls

Specific controls

The copy down feature has a number of rules around its functionality which should be carefully considered, these can be found below:

- Copy down can only be used by Organisation Administrators of a Parent Organisation that have Child Organisation set up.
- If the Parent's question is irrelevant to the Child, the answer will not be copied down.
- If the Parent's question is unanswered, the question is ignored and will therefore not clear the Child's answer.
- If a Parent's File upload control is answered with file upload(s), a copy of the file(s) will be created for the Child.
- Chosen answers from the Parent's form will overwrite the Child's answer.
- The Child will be unable to make changes to their form until the copy down process is complete.
- Copy down can be used as many times as required.

It is important to remember that if the parent organisation submits their form prior to copying down the answers to their children organisations, the declaration controls at the bottom of each section will be cleared from the parent form and therefore cannot be copied down to the child organisations, which will prevent them from submitting.

If this does happen, the parent organisation will be required to copy down the answers from the parent form into the children organisations and will need to ensure the 'Post Copy Down Action' selected is set as 'Nothing'. This means the forms will not be submitted. Once the copy down process has completed, you will then be required to go into each of the child organisations and tick every declaration at the bottom of the sections and submit each child form individually.



Please note: Initiating a copy down will form part of an enqueue process, meaning that requests will be handled sequentially. Therefore, a copy down will not be actioned until the previous copy down task has been completed. Subsequently, organisations should plan accordingly as deadlines approach, ensuring that work is carried out well in advance of the submission period deadline. Organisations should also be mindful that multiple organisations will be accessing this feature concurrently, which may impact processing times and cause longer delays.

For further information on this feature, please visit our User Guide which is available on the [Support and Resources](#) page. For any queries regarding the WIGTK or this feature, please contact the team via email: WelshIGToolkit@wales.nhs.uk.

