



SI/ OT Team V1.0.1

Document CareDirector SI/ OT Team Bespoke Guide.
Purpose SI/ OT daily tasks on CareDirector.
Version V1.0.1
Owner ICT Business Transformation Team
Last Updated 18/11/2022

Contents

Guide Information.....	4
Before Live Access... ..	4
Guide Navigation	4
How to search for a Service User.....	6
Updating Person Details	7
How to add relationships	8
How to Enter Date of Death.....	10
How to search for a Case.....	11
How to create a Case	12
How to check the Case Status.....	13
How to change the Case Status	14
How to Allocate a Case to a Worker	15
How to send a Case to another team	17
COT & SI Secondary Allocation Process.....	20
How to clone a Case.....	21
How to find Activities	23
How to input an Activity	25
How to change status to Complete (Re-activate Activities)	27
How to tell if an Activity is linked to a Case or Person Record.....	28
How to Allocate a new Activity to another team	29
How to Allocate an existing Activity to another team	31
How to Clone Activities.....	33
How to upload Attachments	34
How to upload multiple attachments.....	36
How to use Advanced Search	38
How to add a Form	39
How to Allocate a Form	42
How to Clone a Form.....	44
How to reactivate a Closed Form.....	47
How to input Service Provisions.....	48
Where to find Service Provisions	48
How to Authorise a Service Provision.....	49

How to input Service Deliveries	50
How to Clone a Service Provision.....	52
How to End Service Provisions.....	54
How to search for a Provider.....	55
Where to find Financial Assessments.....	56
How to close a Case	57
Ending Secondary Involvements	57
Close an Open Activity	60
Closing a Case	63
Further CareDirector Guidance	67

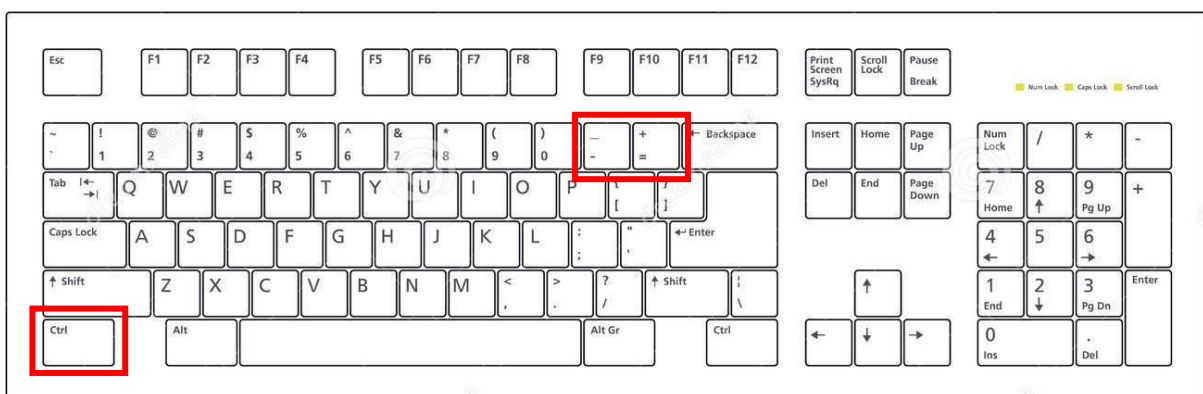
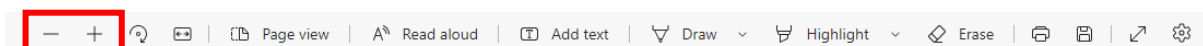
Guide Information

Before Live Access...

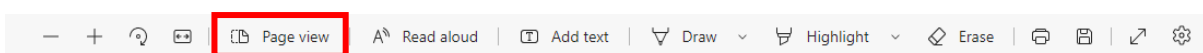
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

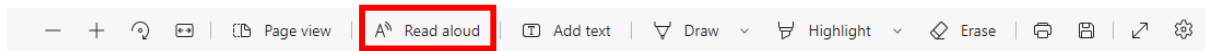
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



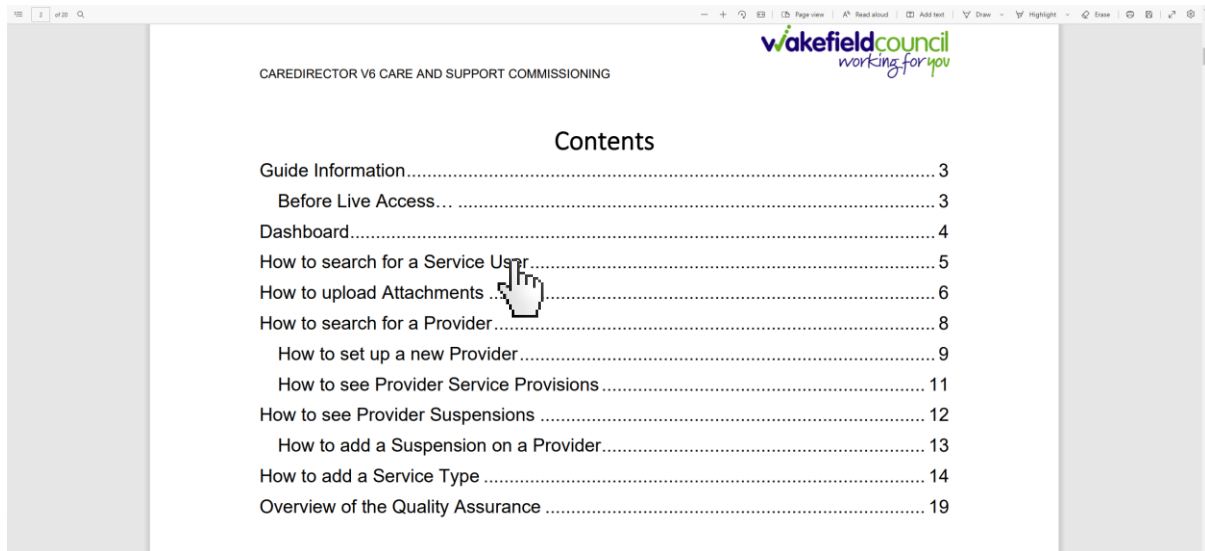
3. To put pages next to one another, select the **Page View** icon on the toolbar.



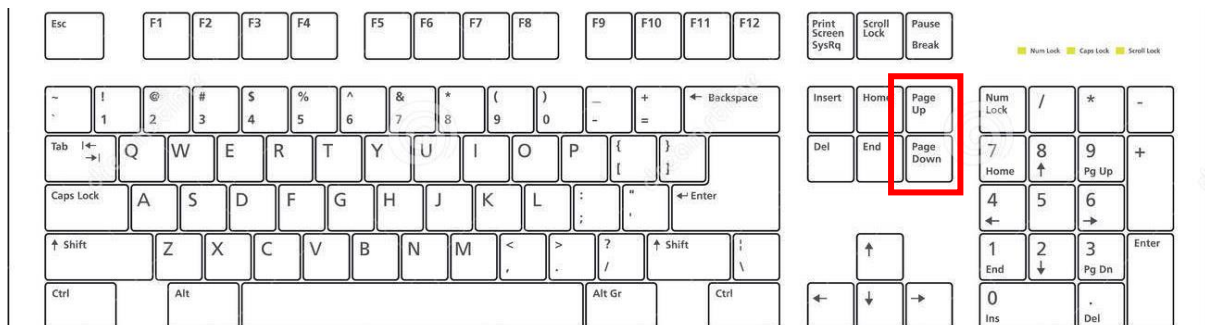
4. For auditory assistance, select **Read Aloud** from the toolbar.



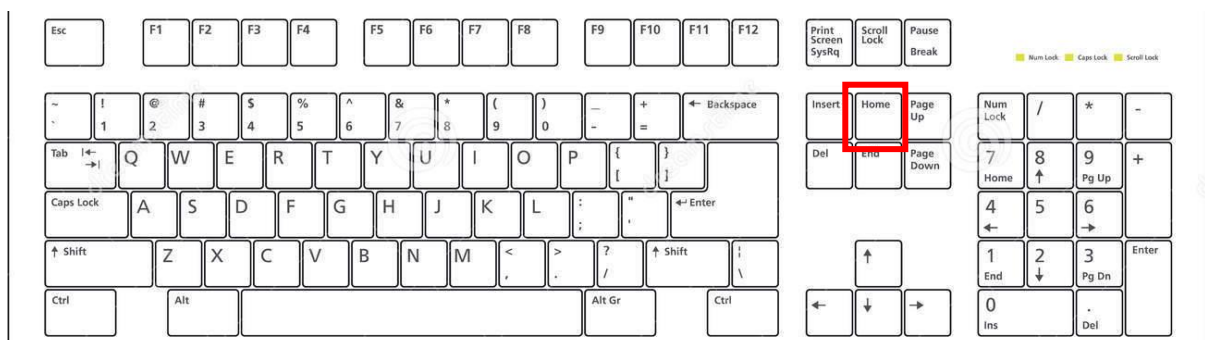
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to “jump” up and down a page.

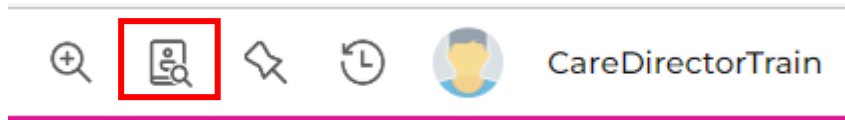


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



How to search for a Service User

1. Select the **Person Search** icon on the **Navigation Menu**



2. Enter their details provided. When finished, select **Search**.

3. Select from the list on the right-hand side. This will open their **Person Record**.

Updating Person Details

1. Select the **Person Record** that needs updating. Then select the **Edit** function from the toolbar (Pencil Icon).

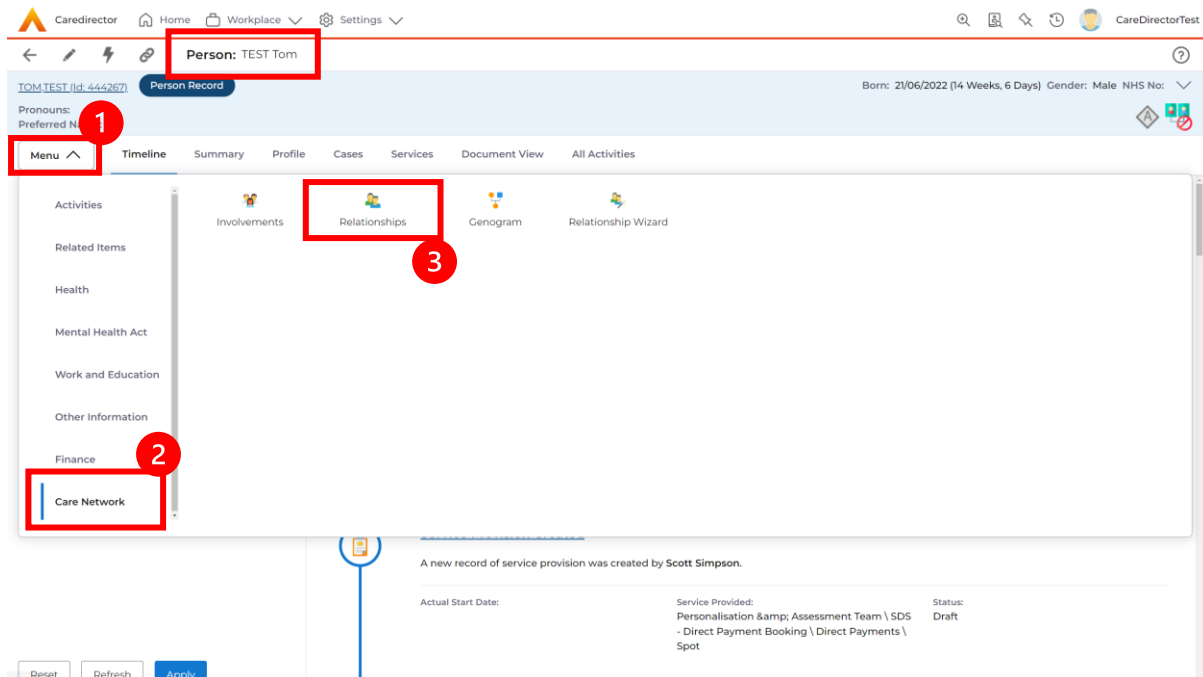
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for 'OCT 2022' and 'SEP 2022', including 'Form (Case) Created', 'Service Provision Created', and 'Task Created'.

2. This will open the **Person Creation Screen**. Scroll down and edit the details required. When finished, select **Save and Return to Previous Page**.

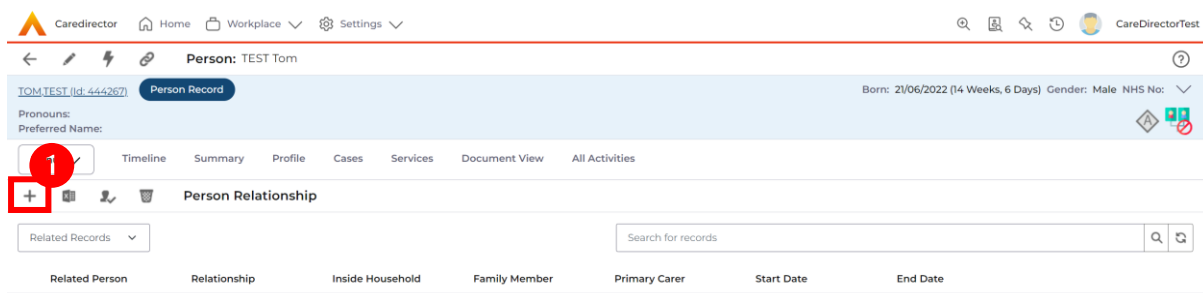
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page shows a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no NHS No., Ethnicity, and Marital Status.

How to add relationships

1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships**.



2. When selected, **Create New Record** from the toolbar.



3. Inside this section:
 - a. The **Service User** will be the **Primary Person**.
 - b. **Is a** field, is what the **Primary Person** is to the other **Service User**.
 - c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on the system, they need to be created).
 - d. Within **Reciprocal Relationship** section will be the opposite.
 - e. **Nature of Relationship to Primary Person** can be manually inputted.

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

TOM.TEST (id: 444267) **Person Record** Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No:

Pronouns: Preferred Name:

Details

Relationship to Other Person

Primary Person*

is a*

To*

Reciprocal Relationship

Person

is a*

To

Relationship Details

Start Date*

Responsible Team*

End Date

Description

Nature of Relationship to Primary Person

Inside Household <input type="text"/>	Primary Carer <input type="text"/>
Family Member <input type="text"/>	Powers of Attorney <input type="text"/>
Next of Kin <input type="text"/>	Power of Attorney for Property and Financial Affairs <input type="text"/>
Emergency Contact <input type="text"/>	Financial Representative <input type="text"/>
Key Holder <input type="text"/>	Young Carer <input type="text"/>
Advocate <input type="text"/>	Legal Guardian <input type="text"/>
MHA Nearest Relative <input type="text"/>	Secondary Caregiver <input type="text"/>
Is Birth Parent <input type="text"/>	Has Parental Responsibility <input type="text"/>

4. When finished, select **Save and Return to Previous Page**.

How to Enter Date of Death

1. Locate the **Person Record** and select the **Edit** icon on the toolbar.

The screenshot shows the CareDirector interface for a person record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a toolbar with a back arrow, an edit icon (pencil) highlighted with a red box and a '1' in a red circle, and a 'Person: Test Tom' label also highlighted with a red box. The main content area shows the 'Person Record' for 'TOM,Test (Id: 446229)'. The record includes fields for 'Born: 03/05/1996 (26 Years)', 'Gender: Male', and 'NHS No:'. Below this is a 'Menu' dropdown and a 'Timeline' tab. The timeline shows two entries for 'OCT 2022': 'Form (Case) Created' and 'Task Created', both by Scott Simpson.

2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes**.

The screenshot shows the 'Death Information' section of the person record. The 'Deceased' option is set to 'Yes' (radio button selected). Below this are fields for 'Cause of Death' and 'Place of Death', both with search icons. There is also a 'Date of Death' field with a calendar icon.

3. Enter in the details if known, when finished select **Save**. This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker**.

How to search for a Case

1. Open the **Person Record** the **Case** is linked too. Then select the **Cases** tab to find the current **Case**.

The screenshot shows the 'Person Record' for TOM.TEST (Id: 444267). The 'Cases' tab is selected and highlighted with a red box and a red circle containing the number 1. The main content area displays a timeline for OCT 2022 with two entries:

- Form (Case) Created** (Yesterday at 15:05): A new record of form (case) was created by Scott Simpson. Details: Due Date, Form Type: AMHP Report Form, Status: In Progress.
- Service Provision Created** (Yesterday at 10:12): A new record of service provision was created by Scott Simpson. Details: Actual Start Date, Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot, Status: Draft.

2. When found, select it to open the **Case Record**.

The screenshot shows the 'Cases' tab selected and highlighted with a red box and a red circle containing the number 1. Below the tab, a table of 'Related Records' is displayed, with the first three rows highlighted by a red box and a red circle containing the number 2.

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Cre
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Sc
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Sc

How to create a Case

1. Locate the **Person Record** and under the tab **Cases**, select **Create New Record**.

The screenshot shows the 'Person Record' page for 'MULLENTTEST, Tom (Id: 444264)'. The 'Cases' tab is active. A red box highlights the '+ Create New Record' button. Below the tabs, there is a table of related records:

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
CareDirectorTest	Catherine Jackson	15/06/2022 08:00:00	A - Adult Safeguarding	CAS-000001-0002		Assign To Team	Scott :

2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

The screenshot shows the 'Case: New' form. The form is titled 'Contact Details' and contains the following fields:

- Case No *
- Person * (Tom MullenTest)
- Case Date/Time * (07/10/2022, 09:00)
- Initial Contact
- Date/Time Contact Received * (06/10/2022, 11:00)
- Contact Received By * (Scott Simpson)
- Contact Reason * (A - Adult Safeguarding)
- Presenting Priority
- Additional Information
- Referral Reason

How to check the Case Status

1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**.
When found, select it to open the **Case Record**.

The screenshot shows the 'Person Record' page for TOM.TEST (Id: 444267). The 'Cases' tab is highlighted with a red box and a circled '1'. Below the tabs, there is a search bar and a table of related records.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scot
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case is Allocated, Closed Under Review, etc.**

The screenshot shows the 'Case Record' page for Tom, TEST - (21/06/2022) [CAS-000001-0087]. The 'Details' tab is highlighted with a red box and a circled '1'. The 'Assignment Information' section is highlighted with a red box and a circled '2', showing the 'Case Status' dropdown menu set to 'Assign To Team'.

Assignment Information

Case Status *
Assign To Team

Case Priority

Responsible User

Responsible Team *
AMHP Coordinator

Review Date

Last Assigned to Team Date
20/09/2022

How to change the Case Status

1. On the **Case Status** field select the **Lookup** function and select the relevant **Case Status**.

The screenshot shows the 'Person Record' page for TOM.TEST. The 'Details' tab is highlighted with a red box and a '1'. Below it, the 'Case Status' dropdown menu is open, showing 'Assign To Team' with a red box and a '2'. Other fields like 'Case Priority', 'Responsible User', and 'Responsible Team' are visible.

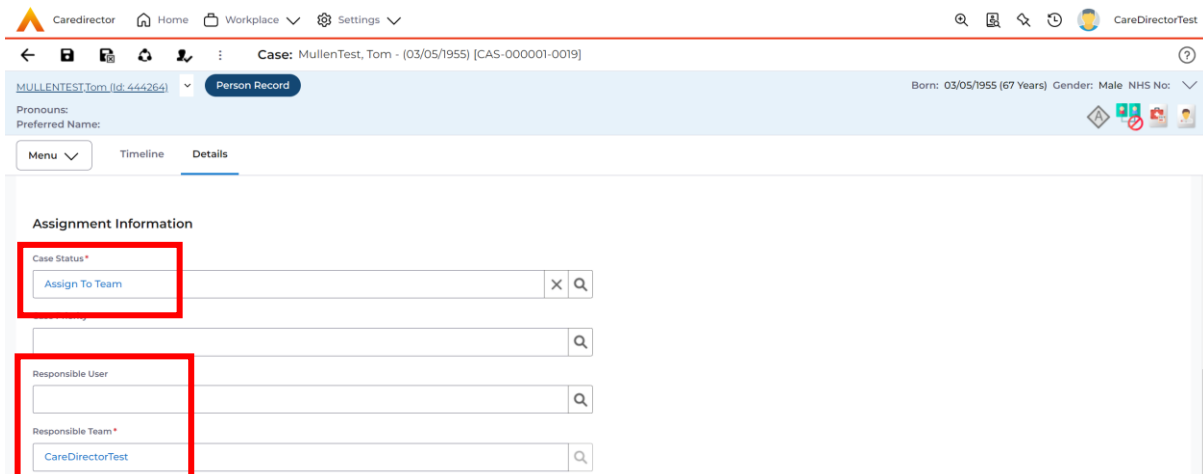
2. Choose the relevant option and select **OK** when found. Select **Save**.

The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. A table of case status options is shown, with 'Allocated' selected (1). The 'OK' button is highlighted (2).

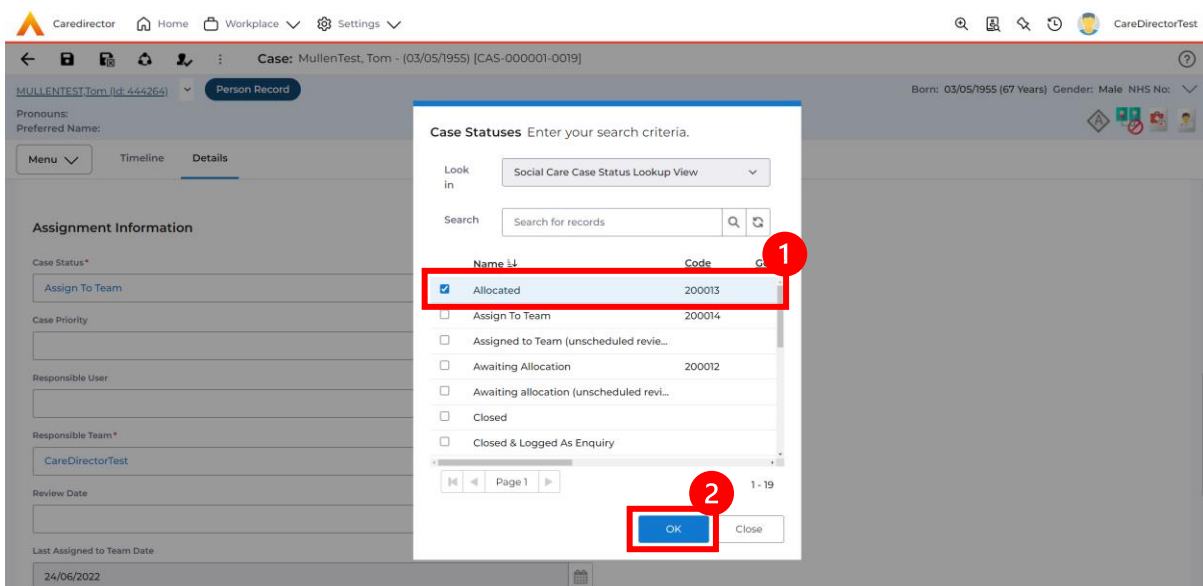
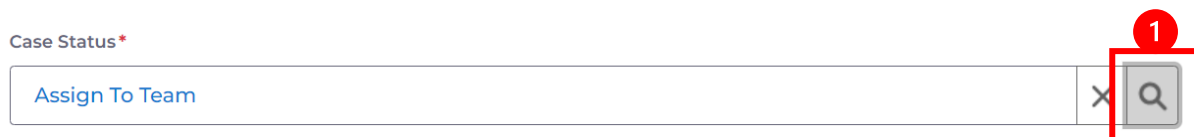
Name	Code	Gov C
<input type="checkbox"/> Allocated	200013	
<input type="checkbox"/> Assign To Team	200014	
<input type="checkbox"/> Assigned to Team (unscheduled review...)		
<input type="checkbox"/> Awaiting Allocation	200012	
<input type="checkbox"/> Awaiting allocation (unscheduled review...)		

How to Allocate a Case to a Worker

1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route**.
2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.



3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.
4. First select the **Lookup** function on the **Case Status** field and select **Allocate**. Then select **OK**.



- After, the **Responsible User** field will be mandatory. Use the **Lookup** function and select the **Responsible User** for this **Case**. When selected, select **OK**.

Responsible User*

🔍

The screenshot shows the 'System Users' dialog box with the following elements:

- 1**: Search criteria input field.
- 2**: List of system users including 'My Business Unit Users', 'Active Managers', 'Deactivated Users', 'Lookup View', 'My Business Unit Users', 'My Default Team', and 'My Record'.
- 3**: 'OK' button.

The background interface shows the 'Assignment Information' section with the 'Responsible User*' field highlighted.

- When a **Responsible User** has been chosen, select **Save** from the toolbar. This will send the **Case** to their **Dashboard** and **System Views**.

The screenshot shows the 'Assignment Information' section with the following fields:

- Case Status*: Allocated
- Case Priority:
- Responsible User*: Scott Simpson
- Responsible Team*: CareDirectorTest
- Review Date:

The toolbar at the top shows the 'Save' button highlighted with a red box and a '1'.

How to send a Case to another team

1. There may be reasons that a **Case** needs to be sent to another team.
2. Locate the **Case** that requires assigning to another team, if this **Case** has a **Responsible User**, then it will have the **Case Status** of **Allocated**.
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save**.

The screenshot shows the CareDirector interface for a case record. The 'Assignment Information' section contains the following fields:

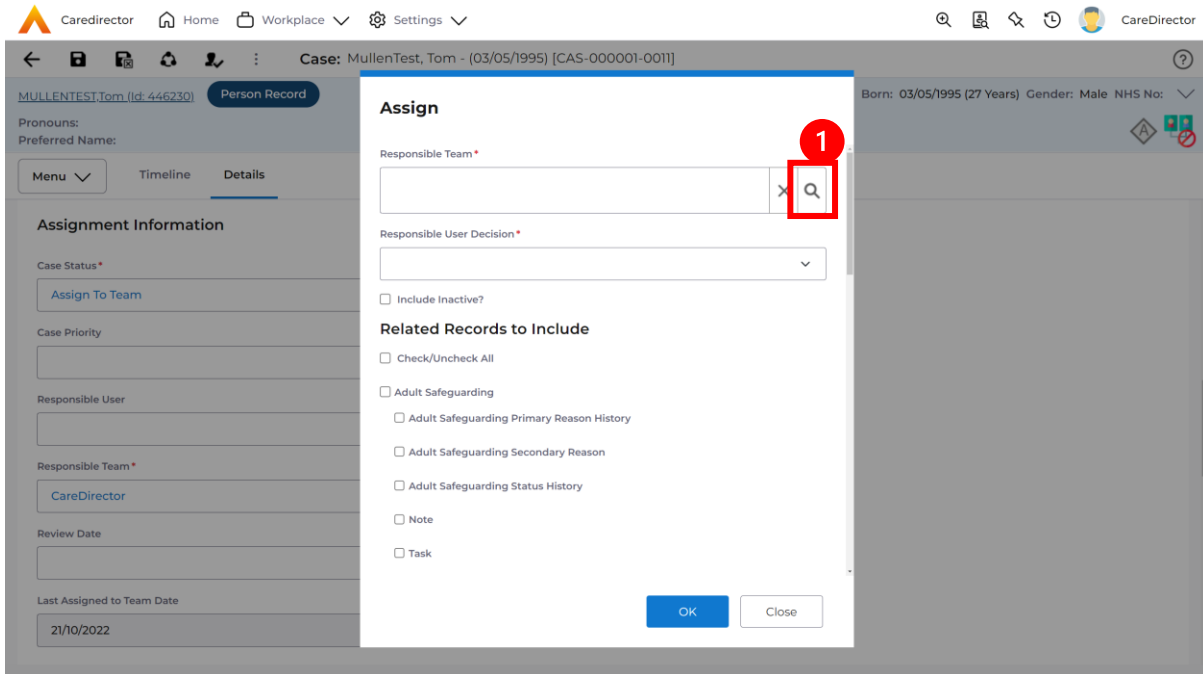
- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights the dropdown, and a red circle with the number '1' is next to it.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A text input field containing 'Scott Simpson'. A red box highlights the field, and a red circle with the number '2' is next to it.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker icon.

4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.

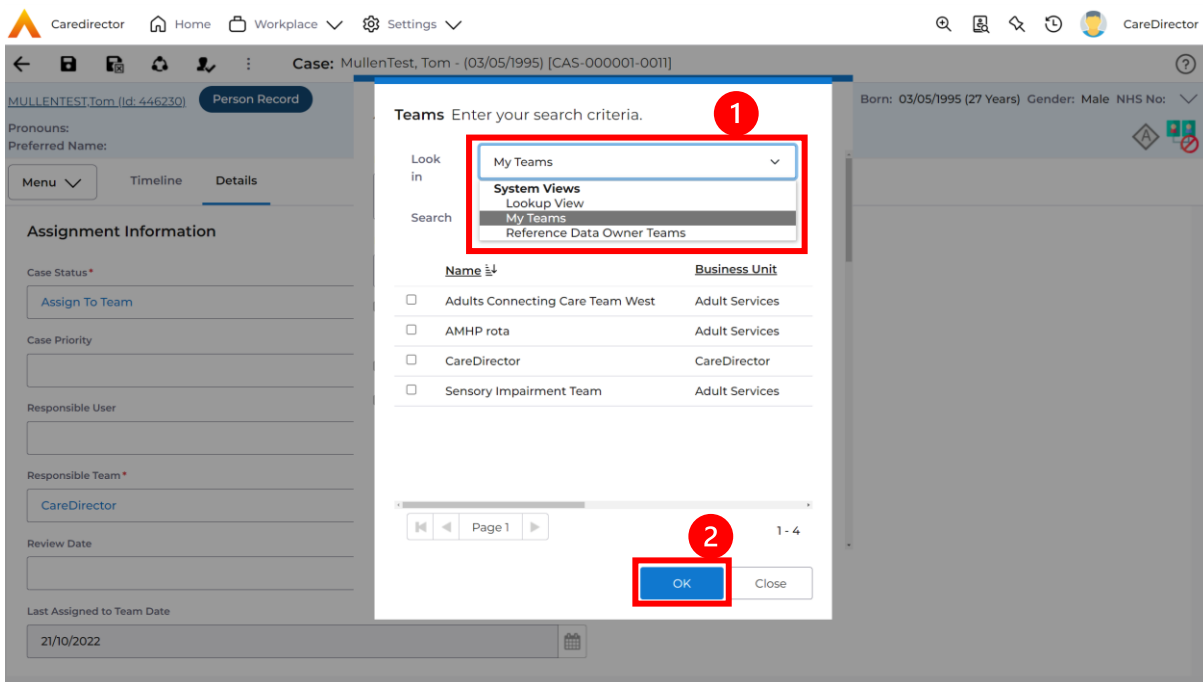
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- Case Status ***: A dropdown menu showing 'Assign To Team'. A red box highlights the dropdown, and a red circle with the number '1' is next to it.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: An empty text input field with a search icon. A red box highlights the field, and a red circle with the number '2' is next to it.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker icon.

- This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup** function.



- Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.



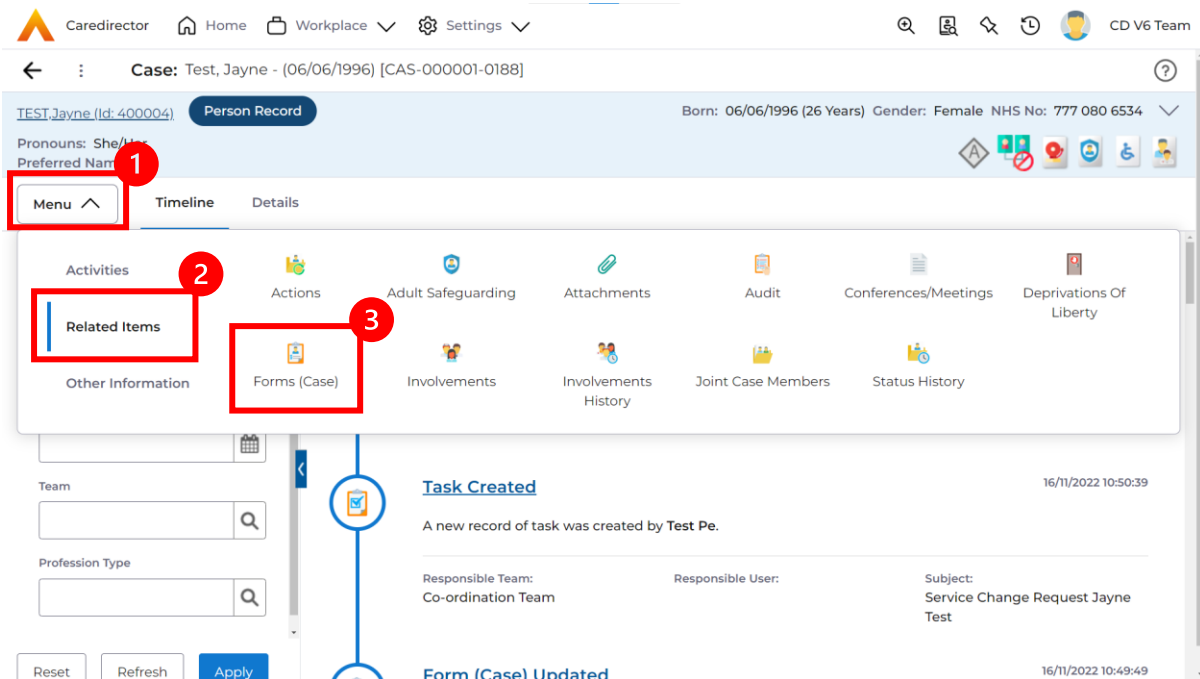
- The next section is going to ask what you want to do about the **Responsible User**. Due to the **Responsible User Workflow** being triggered, removing the current **Responsible User** from the field. We can leave this as **Do Not Change** however, if it has not removed it (you can check by looking at the field on screen) set it as **Clear on Current Record Only**.

The screenshot shows the 'Assign' modal in CareDirector. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown is set to 'Do not change'. The 'Responsible User' field in the background is empty and highlighted with a red box. The 'Related Records to Include' section has several checkboxes, all of which are unchecked. The 'OK' button is highlighted in blue.

- When finished, select **OK**. It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

COT & SI Secondary Allocation Process

1. Locate the **Case** where the **Secondary Allocation** should be incorporated. Then **Menu > Related Items > Forms (Case)**.



2. Select the relevant form, either **Occupational Therapy Referral (Secondary Allocation)** or **Sensory Impairment (Secondary Allocation)** form.

Form Type *

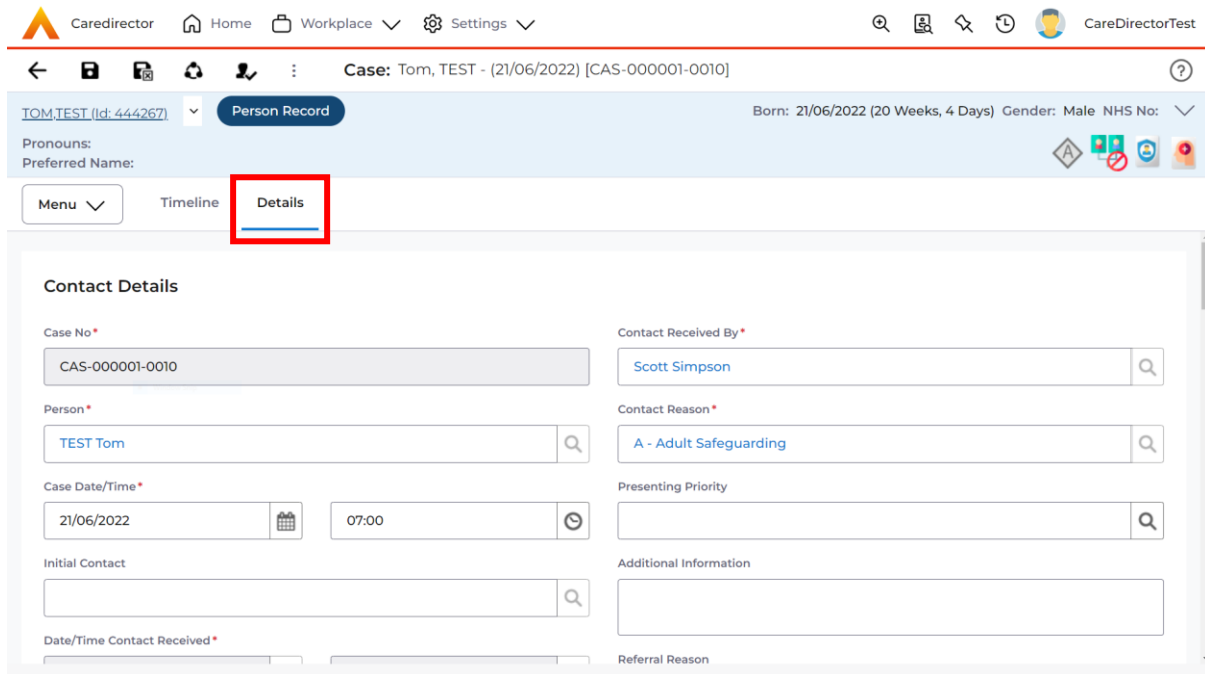
Form Type *

3. When this **Form** has been **Completed** a **Workflow** which creates the **Secondary Case** and generates a **Task** to the relevant team.

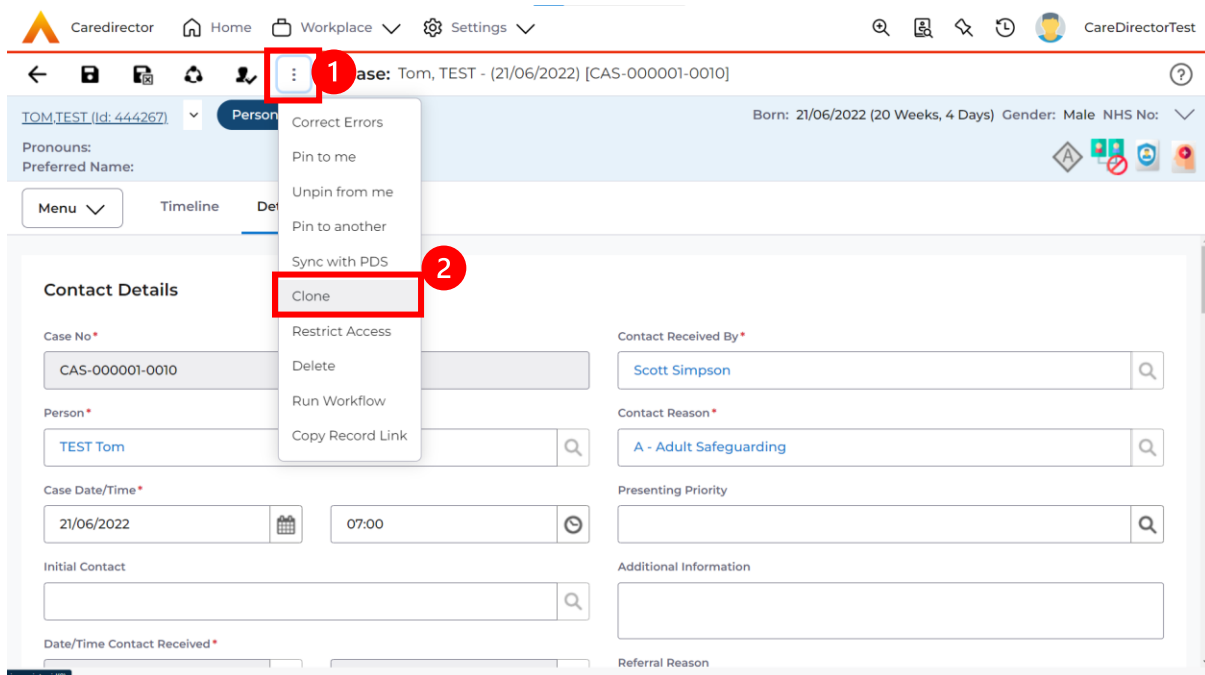
Status *

How to clone a Case

1. Locate the **Case** you want to **Clone**. Select **Details** tab.



2. Then select the **Three Dots** on the toolbar. Then select **Clone**.



3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone**.

Clone Social Care Case

1

Start Date/Time for Cloned Cases *

12/11/2022

<input checked="" type="checkbox"/>	<u>Person Id</u>	<u>Person</u> ⌵	<u>Date of Birth</u>	<u>Gender</u>	<u>Relat</u>
2 <input checked="" type="checkbox"/>	444264	Tom MullenTest	03/05/1955	Male	Brot

Page 1

1 - 1

3

Clone

Close

How to find Activities

1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.

My Active Tasks/Notes

Subject	Regarding	Priority	Event Date	Due	Created On	Created By	Modified On
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:40:...	31/10/2022 10:40:...	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:29:11	31/10/2022 10:29:37	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 14:58:...	28/10/2022 14:58:...	Scott Simpson	28/10/2022 14
<input type="checkbox"/> New Occupational Therapy Referral	Occupational Th...			19/10/2022 00:00:...	19/10/2022 11:39:09	Test Adults Triage User	28/10/2022 14
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 13:51:28	28/10/2022 13:51:31	Jayne Mullen	28/10/2022 13

2. If locating **Activities** on **Person Record** then locate the **Person Record**. Then select the tab **All Activities** then select **Search**.

Person: Test Tom

TOM,Test (Id: 446229) **Person Record** Born: 03/05/1996 (26 Years) Gender: Male NHS No: [dropdown]

Menu | Timeline | Summary | Profile | Cases | Services | Document View | **All Activities**

All Activities

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
<input type="checkbox"/> Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
<input type="checkbox"/> Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
<input type="checkbox"/> Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
<input type="checkbox"/> Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

Search [2]

- This can be filtered further using the options on the left. By default, the search will bring through all **Activities** that are linked to that **Service User** for the past month. Delete the **From Date** to bring through all.

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' filter panel is open on the left. The 'From' date field is highlighted with a red box and a '1' callout. The 'Search' button is highlighted with a red box and a '2' callout.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

- If you want to see where that **Activity** is from. Look on the **Regarding** column.

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' table is visible. The 'Regarding' column is highlighted with a red box.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

How to input an Activity

1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM.TEST (id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: [dropdown]

Menu ^ Timeline Details

- Activities
- Appointments
- Case Notes
- Emails
- Letters
- Phone Calls
- Tasks

Related Items

Other information

Responsible User: [input field]

Responsible Team*: AMHP Coordinator [input field]

2. Once the **Activity** has been selected, select the **Create New Record** from the toolbar.

Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]

TOM.TEST (id: 444276) Person Record Born: 24/07/1950 (72 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: Tom

Menu v Timeline Details

+ [dropdown] [dropdown] [dropdown] [dropdown] Tasks

Related Records [dropdown] Search for records [input field]

<input type="checkbox"/>	Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CMHT Older People Tea...	

3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the 'Case Note (For Case): New' form in the CareDirectorTest system. The form includes several fields for case details:

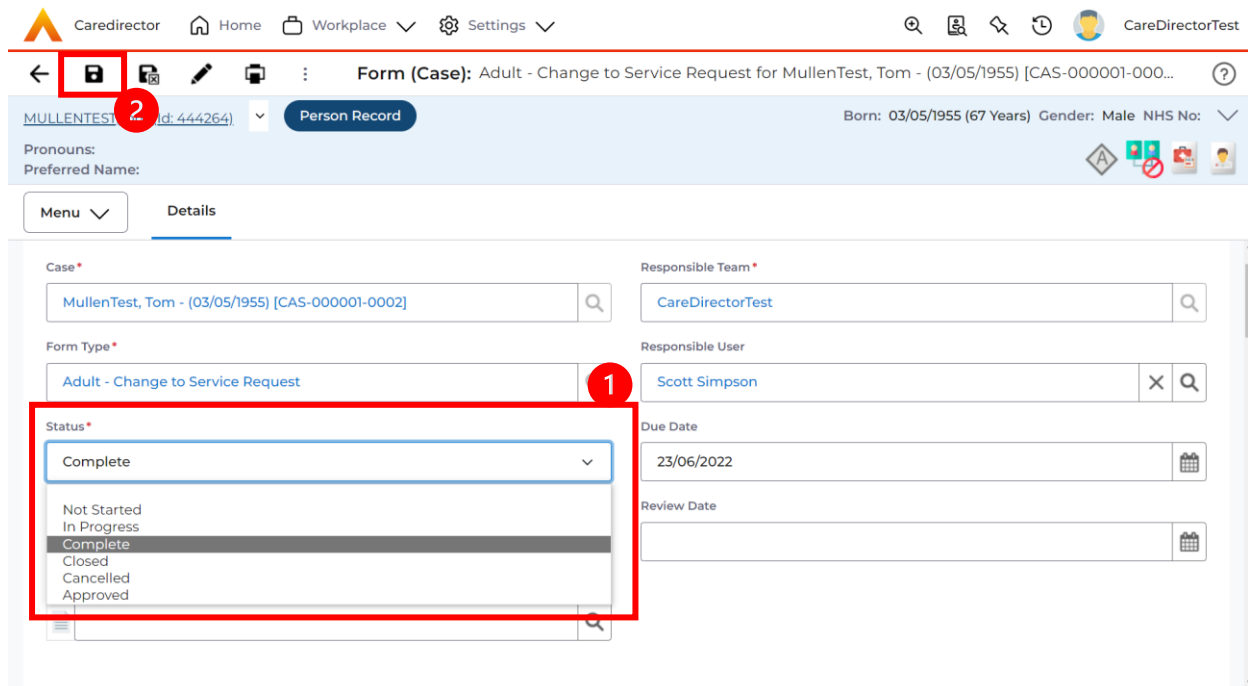
- Case ***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team ***: CareDirectorTest
- Responsible User**: Scott Simpson
- Reason**: (Empty)
- Priority**: (Empty)
- Date ***: (Empty)
- Status ***: Open
- Category**: (Empty)
- Sub-Category**: (Empty)
- Outcome**: (Empty)

Red annotations highlight the 'Save' icon in the top navigation bar (labeled '2') and the 'Responsible User' field (labeled '1').

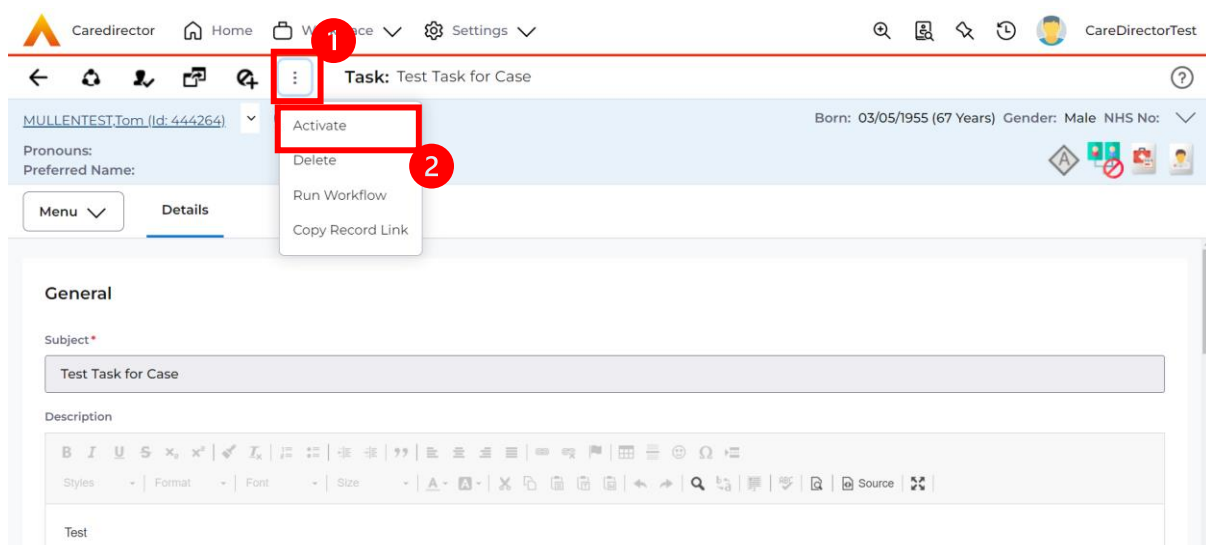
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

How to change status to Complete (Re-activate Activities)

1. Select the **Form** or **Activity** that requires to be **Completed**. This will send an **Activity** to your **Team Managers** dashboard for them to approve.
2. Under **Status** use the dropdown list to select **Completed**. After select **Save**.

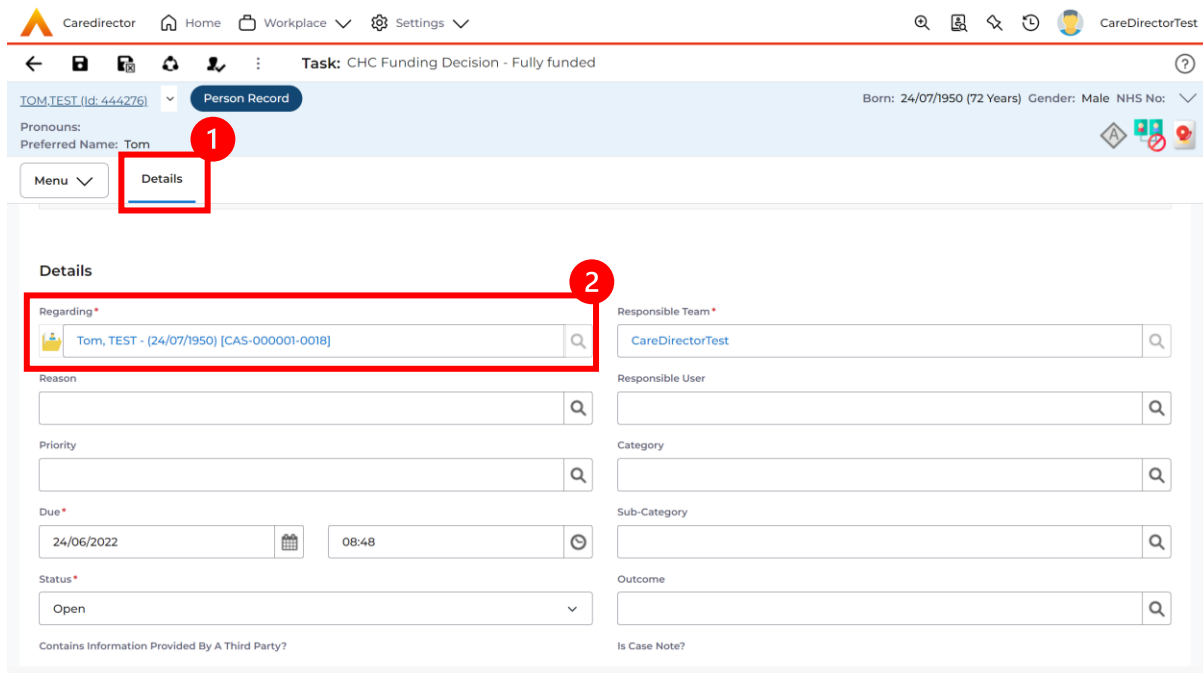


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

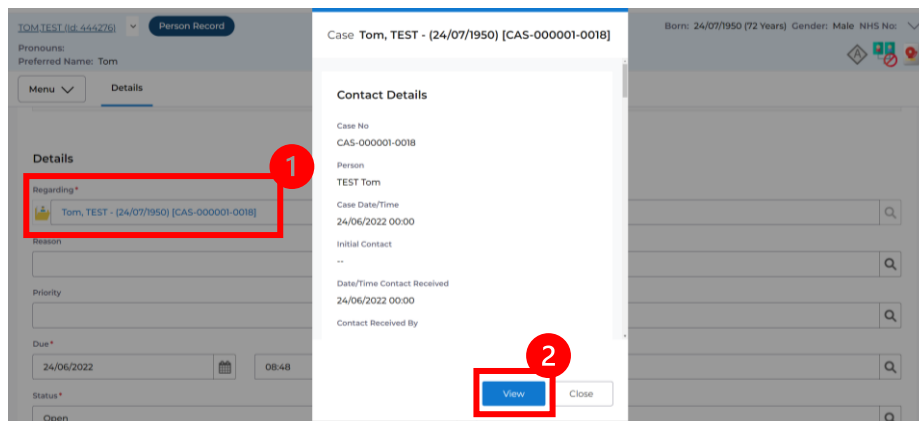


How to tell if an Activity is linked to a Case or Person Record

1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding**.



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test**. It is linked to a **Person Record**.
4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record**) and go into the record by selecting **View**.



How to Allocate a new Activity to another team

1. Before saving a new **Activity**, you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup** function.

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' as the selected option. Other fields include 'Regarding' (MullenTest_Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'.

2. Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.

The screenshot shows the 'Task: New' form with a 'Teams' lookup dialog box open. The dialog box has three red circles: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The list of teams is as follows:

Name	Business Unit
<input type="checkbox"/> Adults Connecting Care Team West	Adult Services
<input type="checkbox"/> AMHP rota	Adult Services
<input type="checkbox"/> CareDirector	CareDirector
<input type="checkbox"/> Sensory Impairment Team	Adult Services

3. If you know the **Responsible User** use the **Lookup** function, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

The screenshot shows the CareDirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom (Id: 446230)'. The 'Responsible User' field is set to 'Scott Simpson' and is highlighted with a red box and a '1' in a red circle. The 'X' icon next to the field is also highlighted. A red box with a '2' in a red circle highlights the 'X' icon in the top navigation bar. The form includes fields for 'Regarding', 'Reason', 'Priority', 'Due', 'Status', 'Responsible Team', 'Category', 'Sub-Category', and 'Outcome'. There are also radio buttons for 'Contains Information Provided By A Third Party?' and 'Is Case Note?'.

How to Allocate an existing Activity to another team

1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User** field. Then select **Save**.

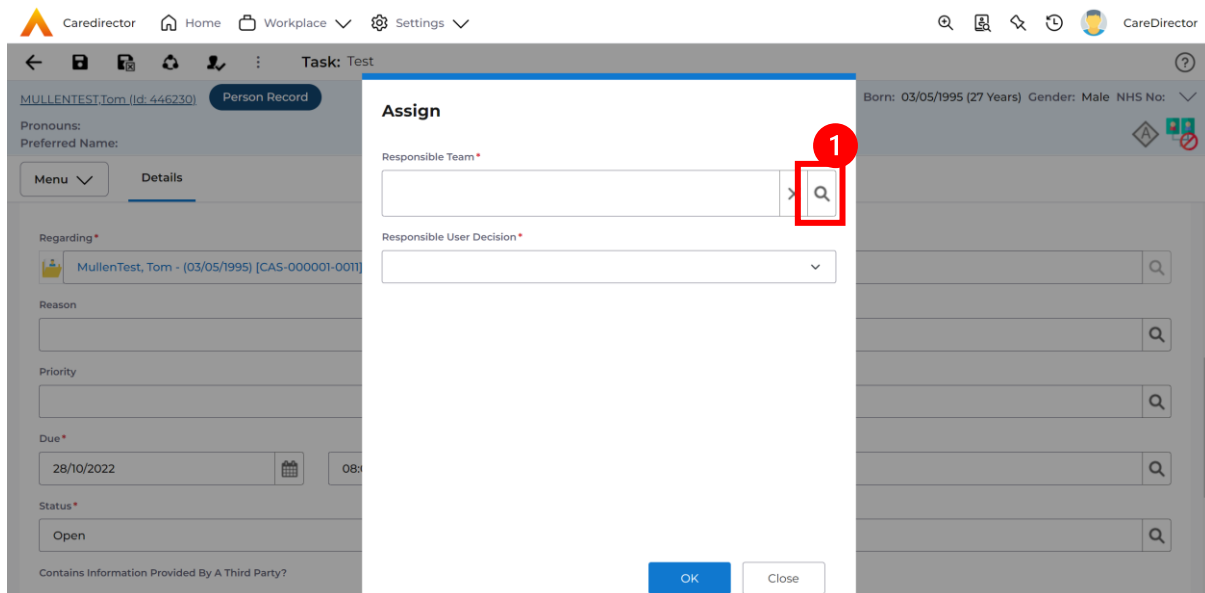
The screenshot shows the CareDirector interface for a task record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The record details include:

- Person Record: MULLENTEST, Tom (Id: 446230)
- Born: 03/05/1995 (27 Years) Gender: Male NHS No: [redacted]
- Details section:
 - Regarding*: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
 - Responsible Team*: Sensory Impairment Team
 - Responsible User: Scott Simpson (highlighted with a red box and a '1' in a red circle)
 - Reason: [empty]
 - Priority: [empty]
 - Due*: 28/10/2022, 08:00
 - Status*: Open
 - Category: [empty]
 - Sub-Category: [empty]
 - Outcome: [empty]

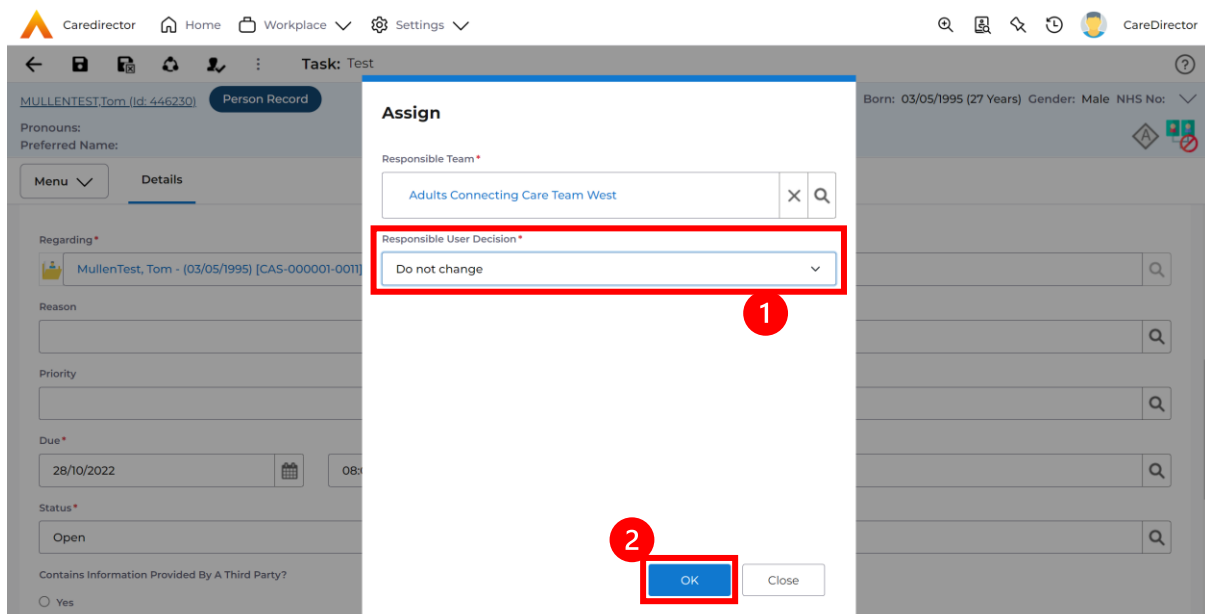
2. Next select **Assign this record to another team** from the toolbar.

This screenshot shows the same CareDirector interface as above, but with the 'Assign' icon in the top toolbar highlighted by a red box and a '1' in a red circle. The task details remain the same, but the 'Responsible User' field is now empty, indicating the record has been assigned to a team.

- This will open a new window. Choose the **Responsible Team** that this **Activity** will be sent to using the **Lookup** function. Remember to use **Look in** once selected to pick from other teams.



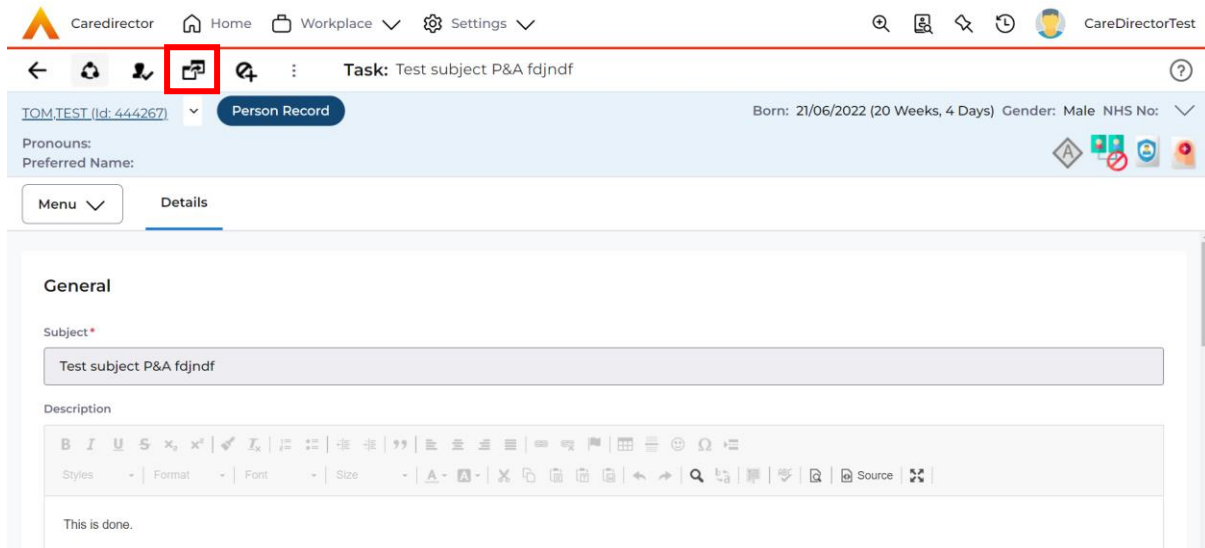
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**. Then select **OK**.



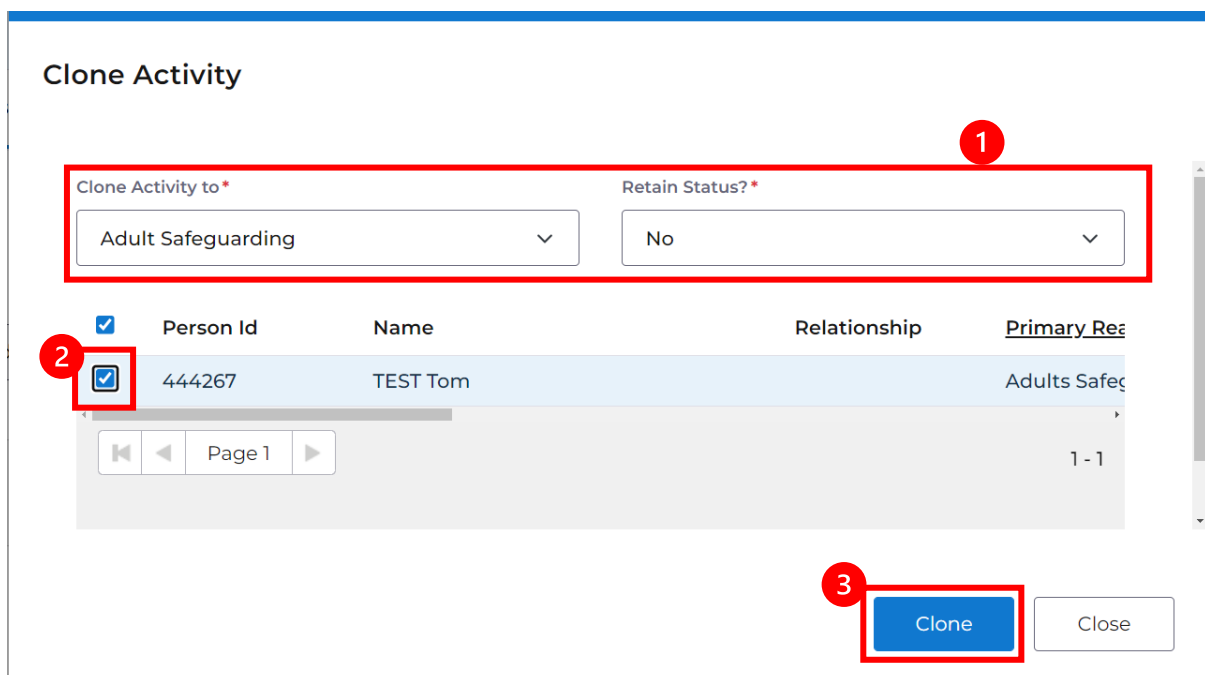
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

1. Locate the **Activity** that requires **Cloning**. Then select the **Clone** icon from the toolbar.

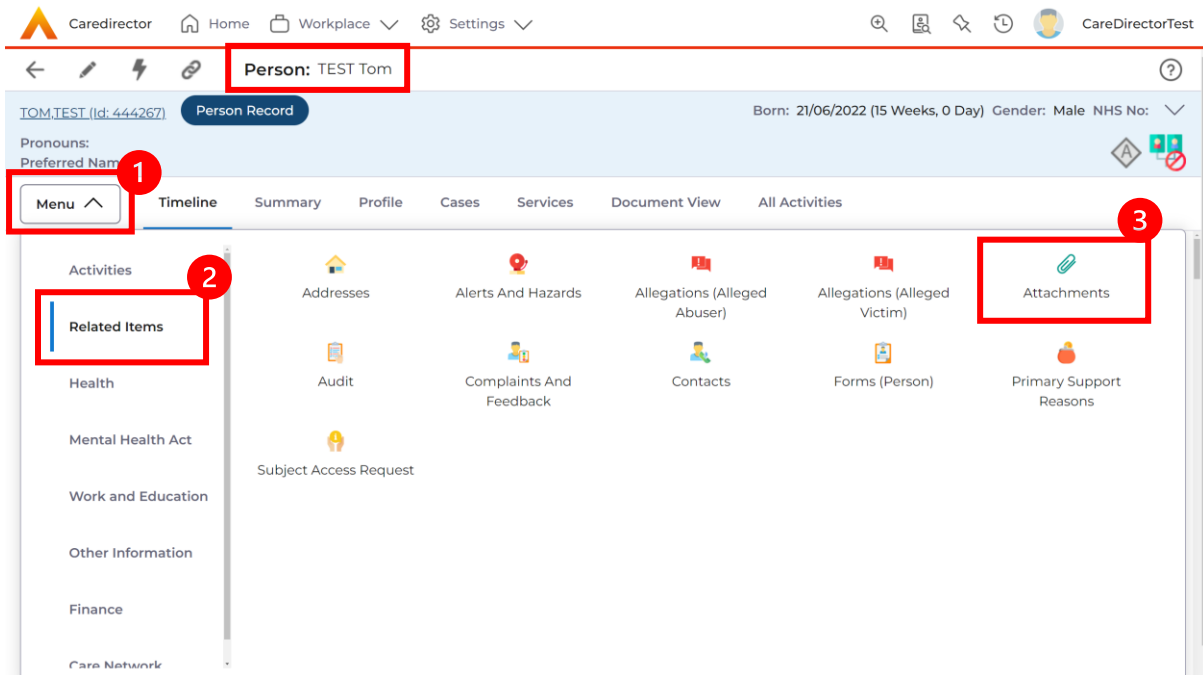


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

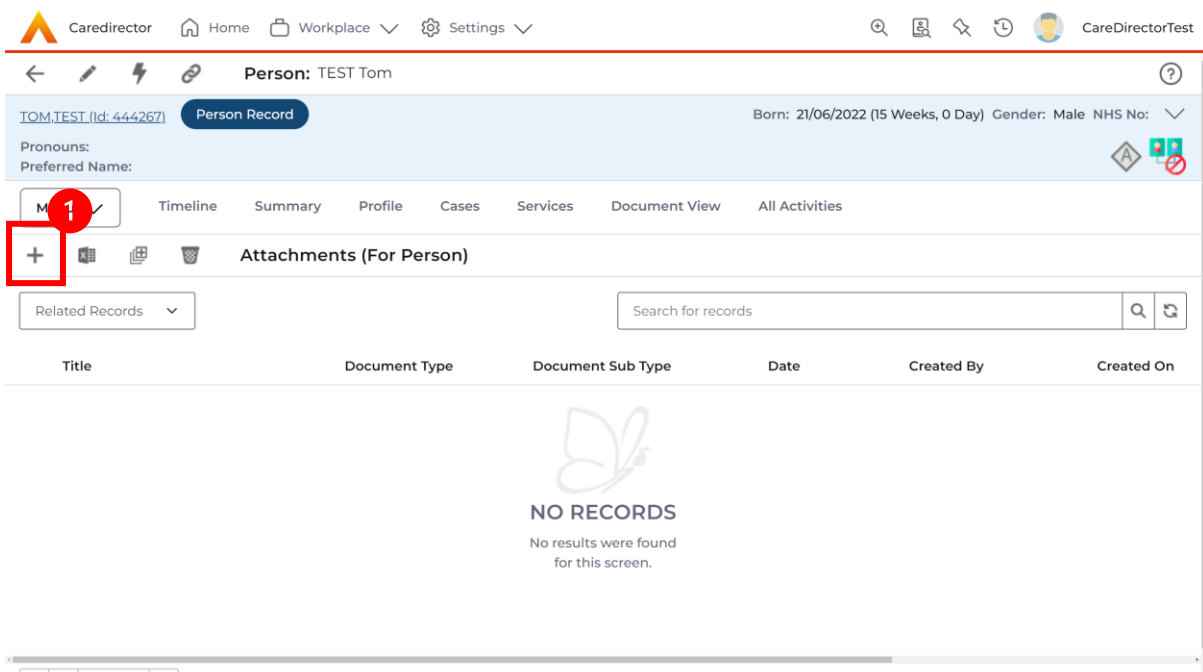


How to upload Attachments

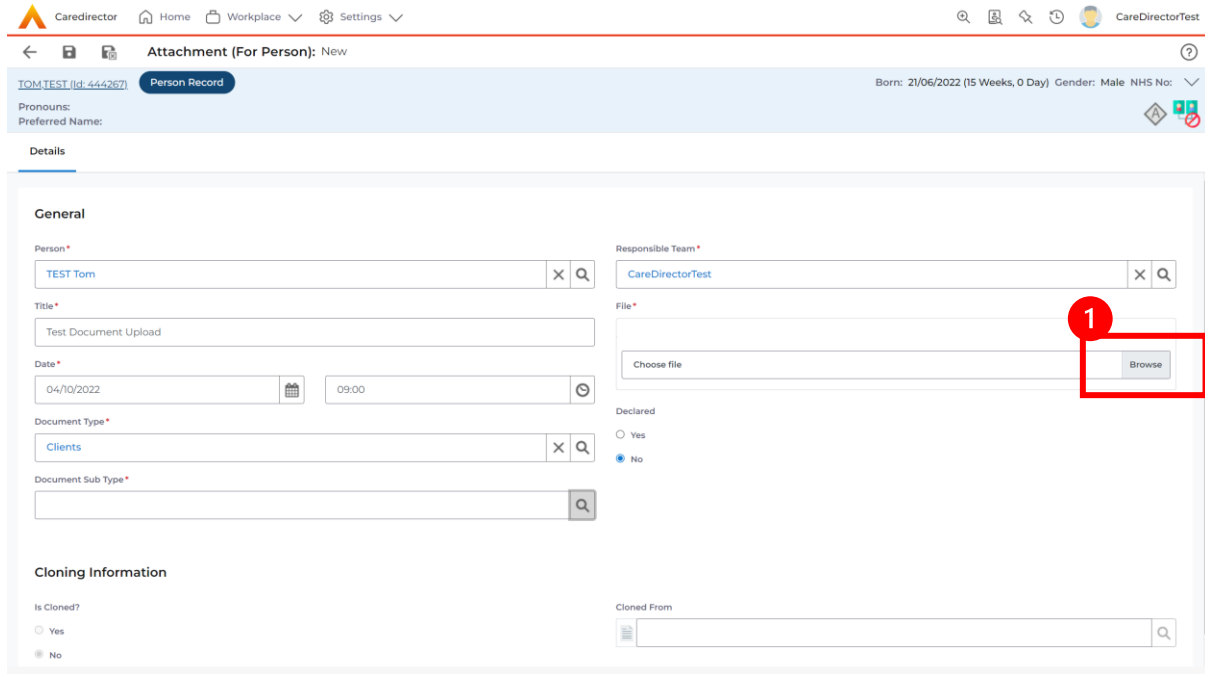
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu**, **Related Items** and then select **Attachments**.



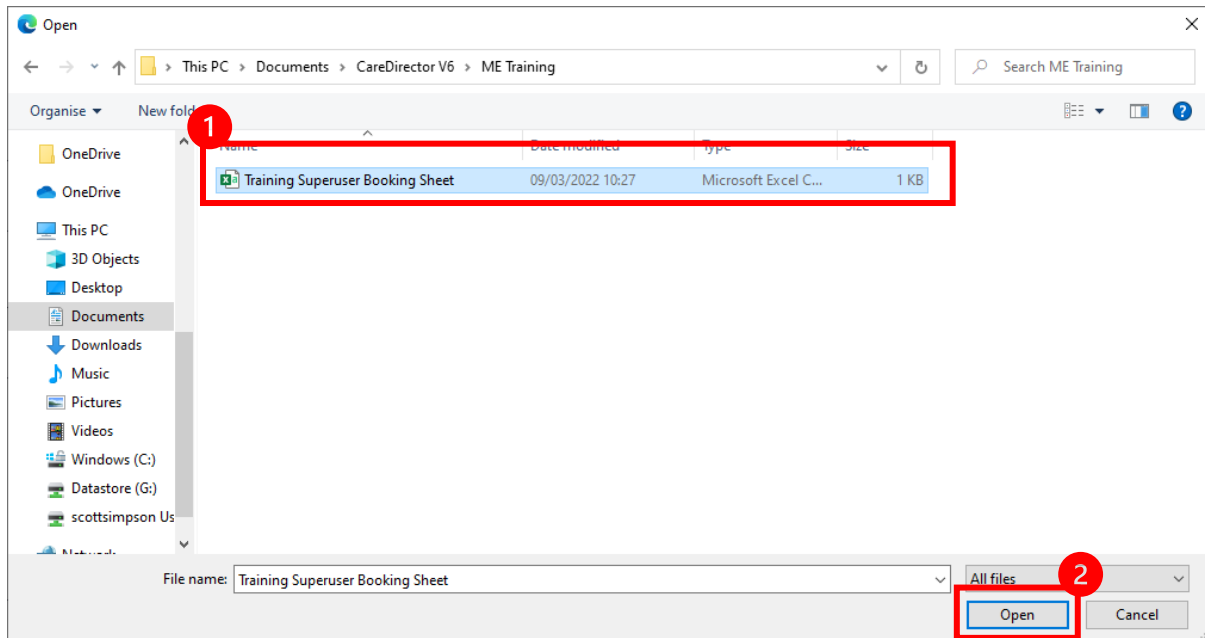
2. When opened, select the **Create New Record** from the toolbar.



3. Fill in the mandatory fields. When finished, select the **Browse** button in the **File** field.



4. Select a **File** from your computer/ SharePoint and select **Open**.



5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

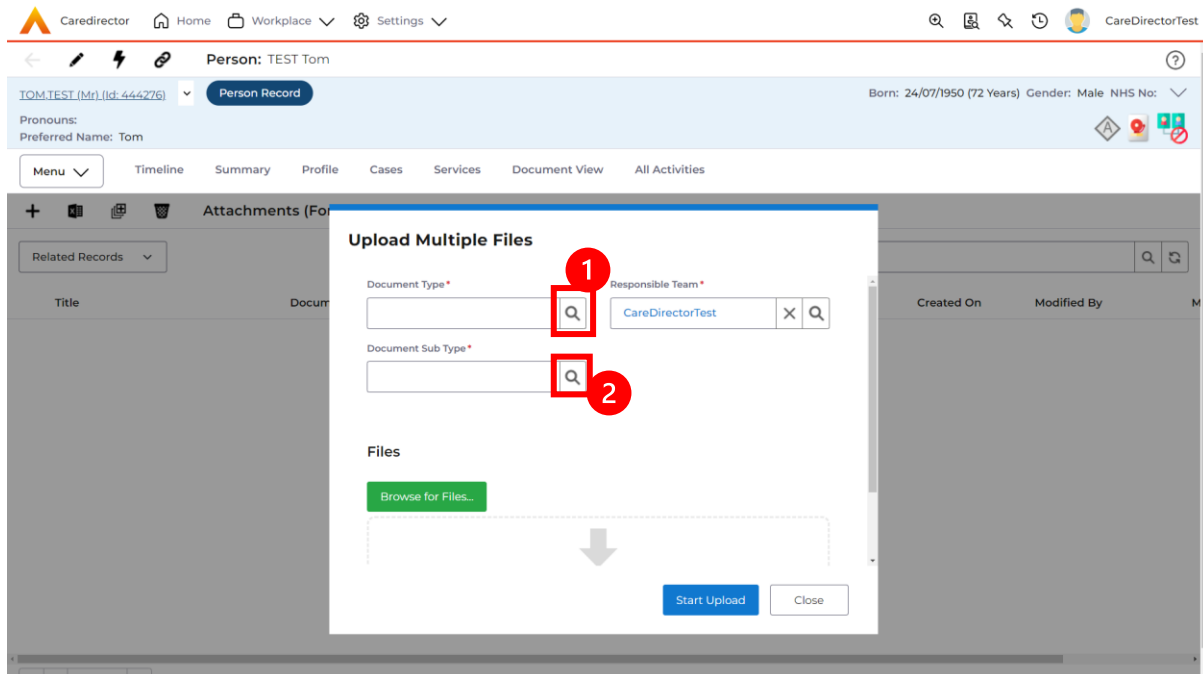
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The record is for 'Person: TEST Tom' (ID: 444267), born 21/06/2022, male. The 'Menu' is open, and 'Related Items' is selected. The 'Attachments' option is highlighted in the 'Related Items' list.

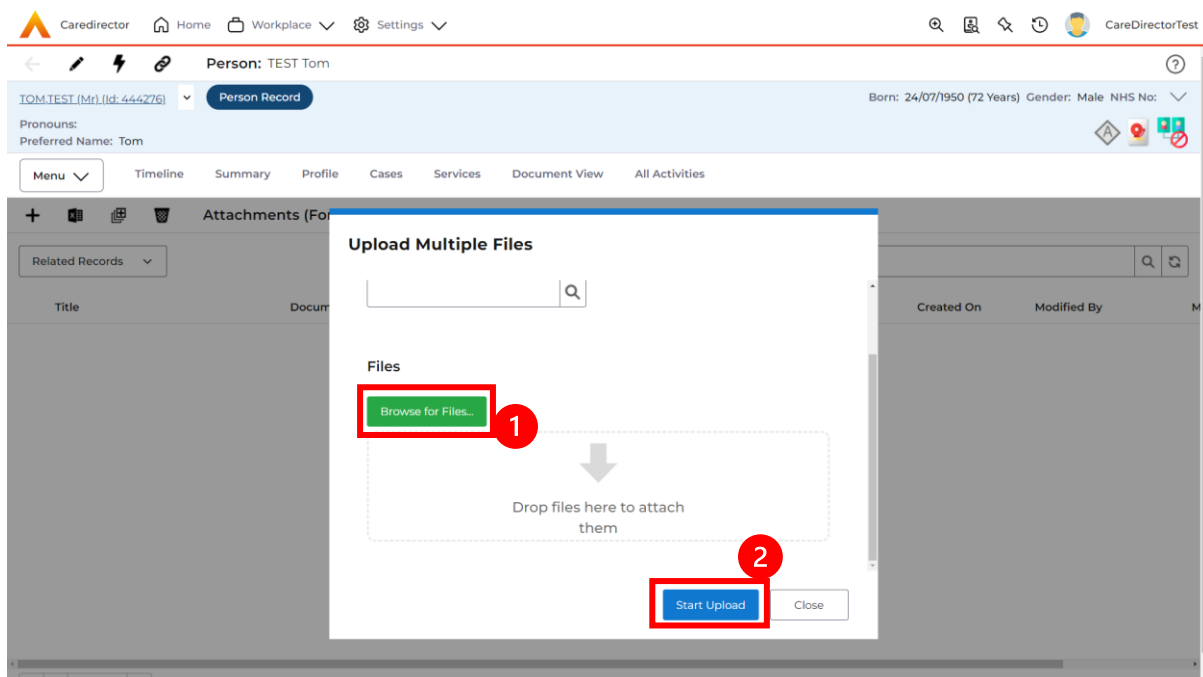
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.

The screenshot shows the 'Attachments (For Person)' screen. The top navigation bar is the same as in the previous screenshot. The 'Menu' is open, and 'Attachments' is selected. The toolbar includes a '+', a trash icon, and a document icon with a plus sign, which is highlighted. Below the toolbar is a search bar and a table with columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is empty, and a message says 'NO RECORDS No results were found for this screen.'

- This will open a window and the **Document Type** and **Document Sub Type** needs to be chosen using the **Lookup** function.



- If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When done, select **Start Upload**.



How to use Advanced Search

1. Most **Advanced Searches** are available through your **Dashboards**. However, situationally there may be a reason to use the **Advanced Search** button on the **Navigation Menu**. You are not able to build your own, you can only choose from pre-built **Saved** ones.
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.

The screenshot shows the CareDirector navigation menu. The 'Advanced Search' icon is highlighted with a red box and a '2' callout. The search icon in the top right corner is highlighted with a red box and a '1' callout.

3. Select from the list to automatically search for the pre-built **advanced search**. If nothing is shared with you independently, tell your superuser.

The screenshot shows the 'Advanced Searches Shared with me' list. The list is highlighted with a red box and a '1' callout. The list contains columns for Business Object Name and Advanced Search Name.

Business Object Name	Advanced Search Name
<input type="checkbox"/> Document	Active Documents
<input type="checkbox"/> ServiceProvision	Booking requests for carers trust
<input type="checkbox"/> ServiceProvision	Booking requests for Coordination te...
<input type="checkbox"/> ServiceProvision	Booking requests- support & enable...
<input type="checkbox"/> ServiceProvision	Cancelled booking requests for Coord...

How to add a Form

1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**.
When found, select it to open the **Case Record**.

Person: TEST Tom

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Menu Timeline Summary Profile **Cases** Services Document View All Activities

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created By
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scott Simpson
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scott Simpson

2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case)**.

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

Person Record

Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Menu ^ Timeline Details

Activities Actions Adult Safeguarding Attachments Audit Deprivations Of Liberty **Forms (Case)** Involvements

Related Items Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

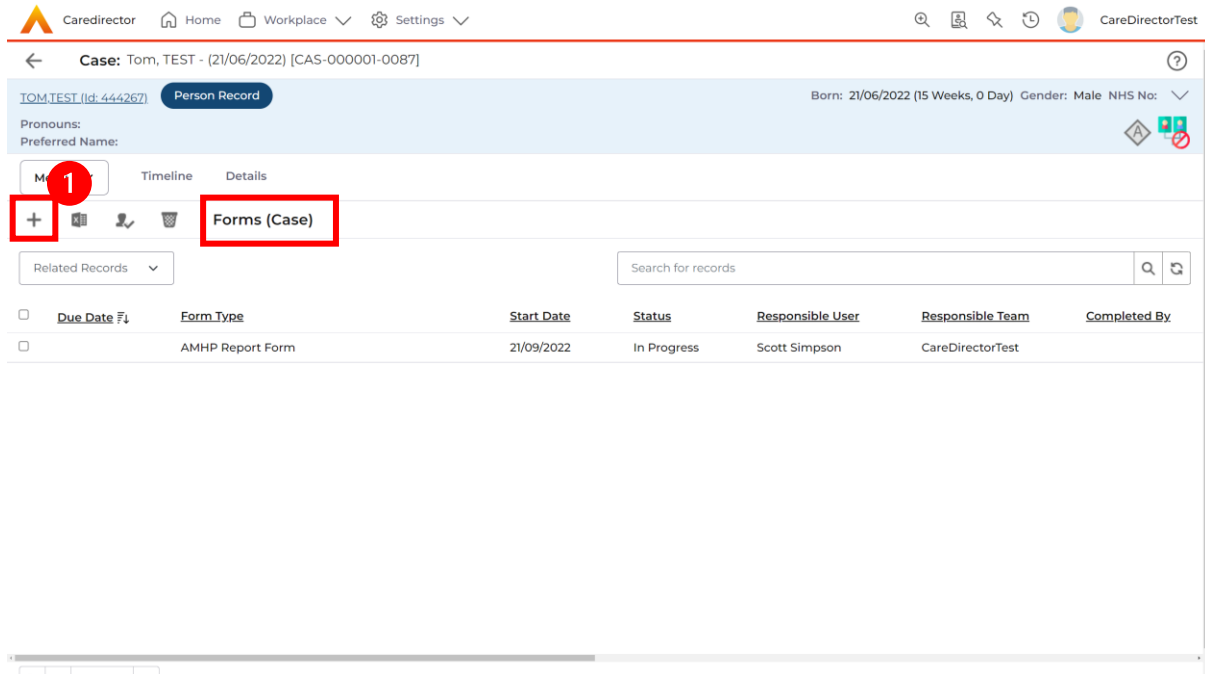
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

Due Date: [input] Form Type: AMHP Report Form Status: In Progress

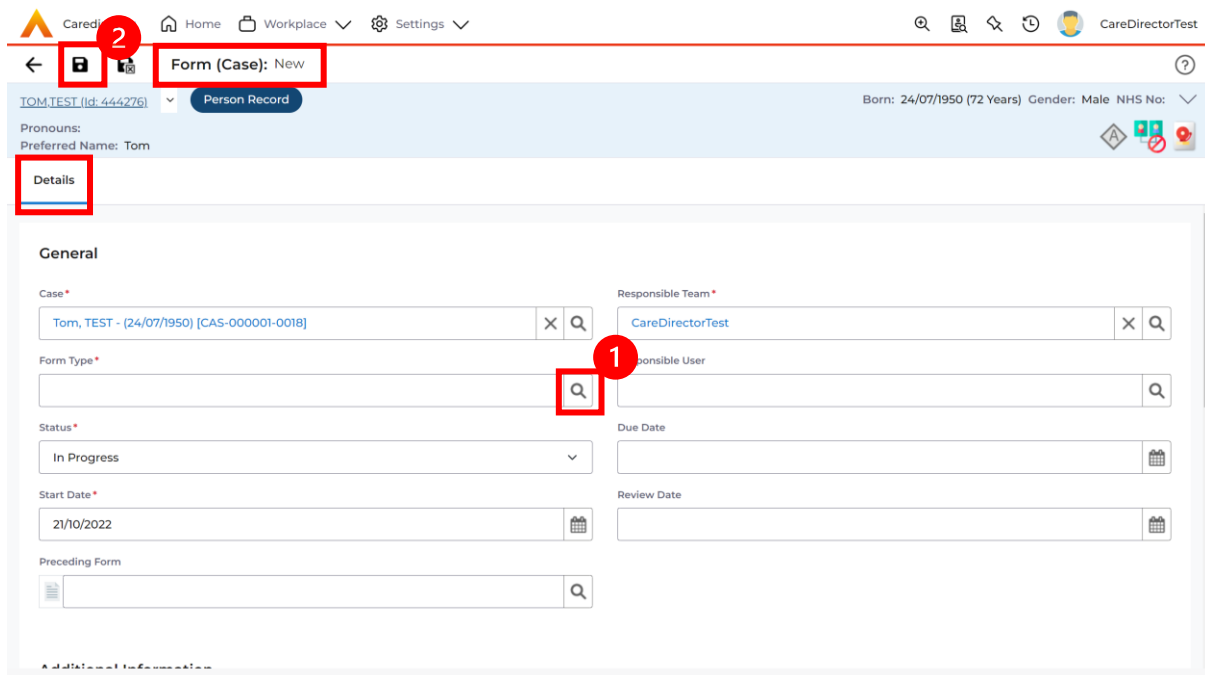
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational Therapist Start Date: 21/09/2022

3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



4. Once inside the **Details**. This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type**. When finished, select **Save**.



5. Now that CareDirector has given us the correct **Form**, the **Edit** button appears on the toolbar. This will allow us to go into the **Form** and fill it out.

The screenshot shows the CareDirector interface for a specific case. The toolbar at the top contains several icons, with the 'Edit' icon (a pencil) highlighted by a red circle and the number '1'. The main content area is titled 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]'. Below the title, there are several form fields:

- Case ***: Tom, TEST - (21/06/2022) [CAS-00001-0087]
- Responsible Team ***: CareDirectorTest
- Form Type ***: AMHP Report Form
- Responsible User**: Scott Simpson
- Status ***: In Progress
- Due Date**: (empty)
- Start Date ***: 21/09/2022
- Review Date**: (empty)
- Preceding Form**: (empty)

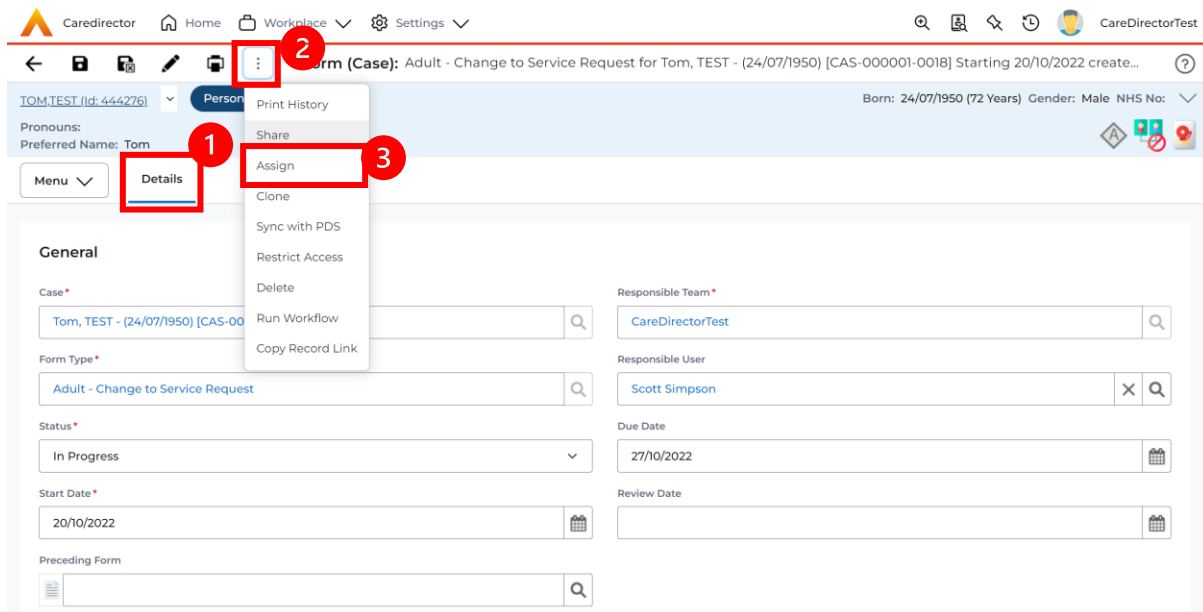
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

The screenshot shows the CareDirector interface for the 'AMHP Report Form'. The toolbar at the top contains several icons, with the 'Save' icon (a floppy disk) highlighted by a red circle and the number '1'. The main content area is titled 'AMHP Report Form'. Below the title, there are several form fields:

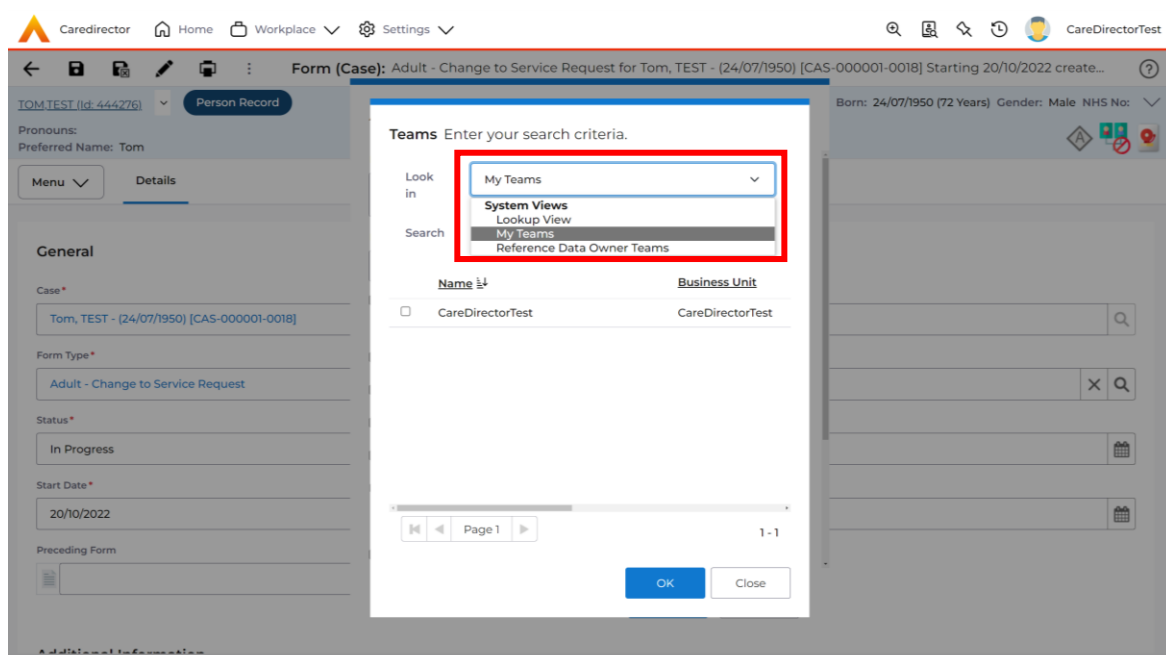
- Service User Details**
- Referral Details**
- Further Details**
- Background Information**
- AMHP'S Assessment of th...**
- Client previously known to services?**: Yes No
- Ethnic Origin**:
 - White - British / Northern Irish
 - White - Irish
 - White - Gypsy or Irish Traveller
 - White - Eastern European
 - Mixed - White and Black African
 - Mixed - White and Black Caribbean
 - Mixed - White and Asian
 - Mixed - Other / Multiple

How to Allocate a Form

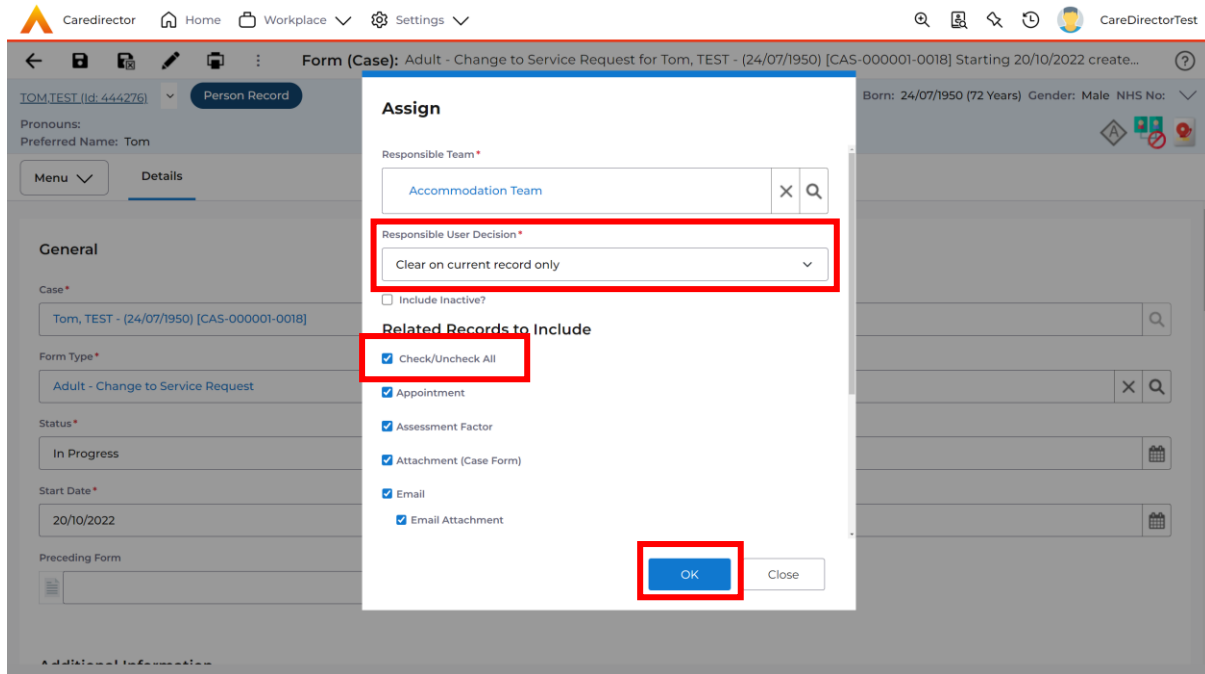
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



2. This will open a separate window for you to allocate this **Form** to another **Team**. Remember to select **Look in** and change to **Lookup View** to find teams.



3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.



How to Clone a Form

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.

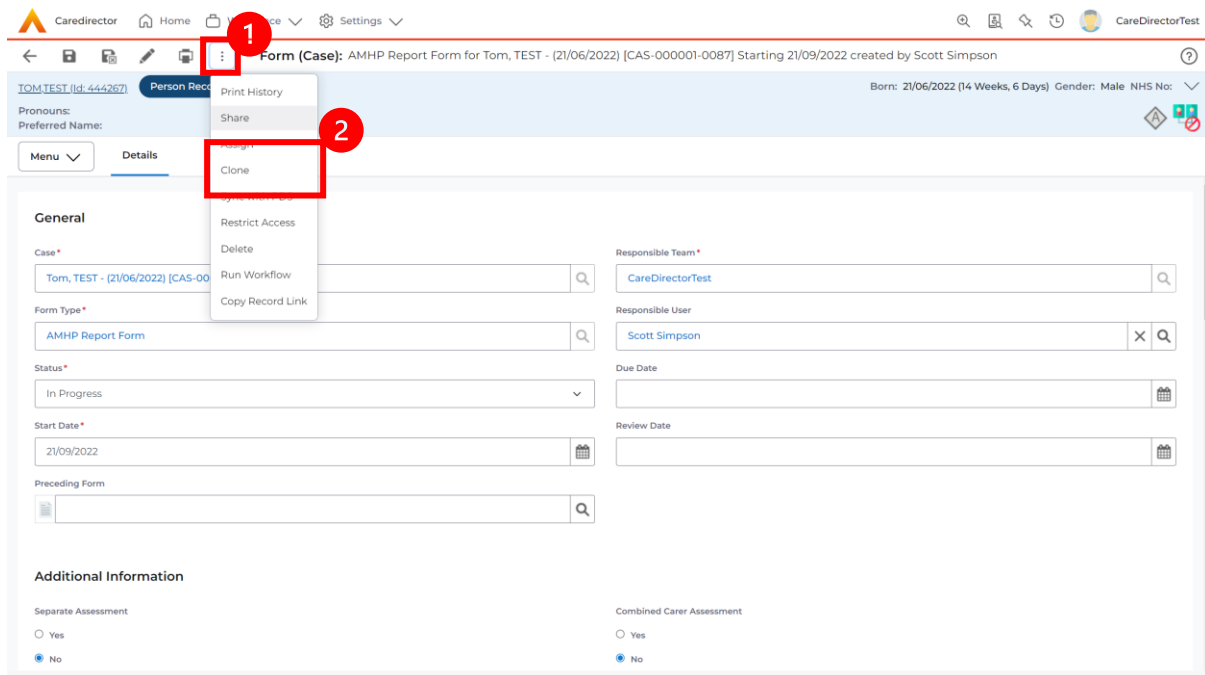
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' dropdown. The main content area shows a timeline of events related to the case, including 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

2. Select the relevant for **Form** to open.

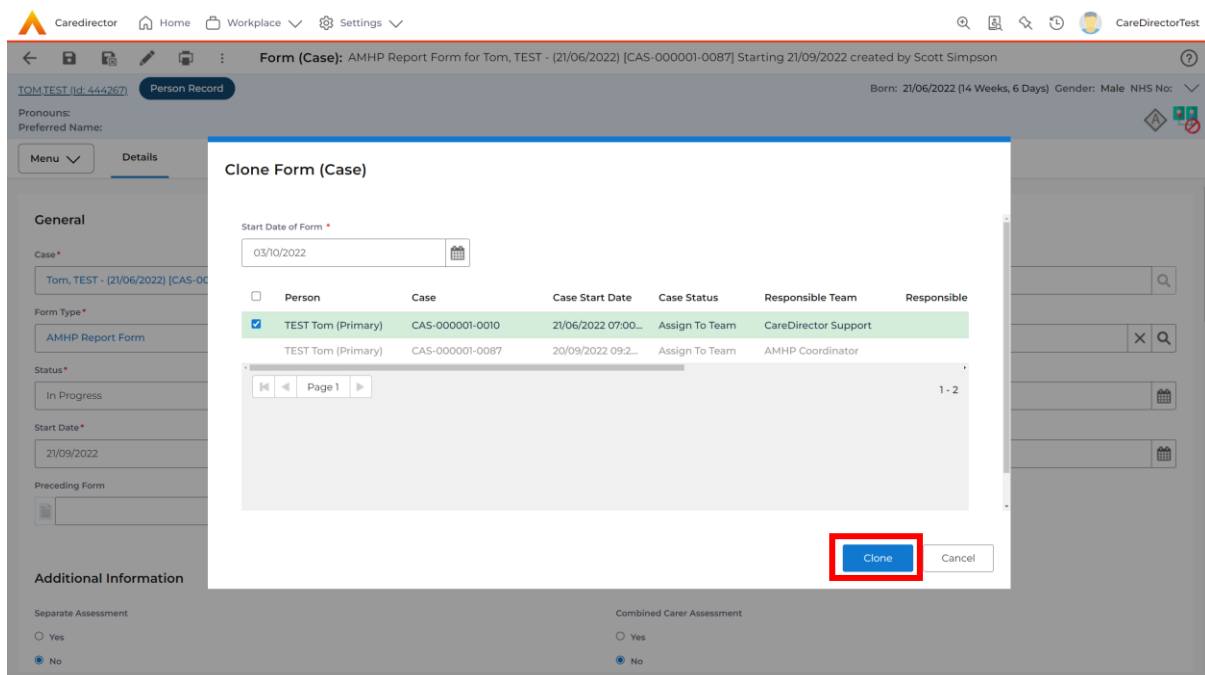
The screenshot shows the CareDirector interface for the 'Forms (Case)' page. The 'Related Records' dropdown is open, and the 'AMHP Report Form' is selected. The table below shows the details of the selected form.

	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

3. From the toolbar, select the **Three Dots** and select **Clone**.



4. It will open a new window. Enter the **Start Date of Form**. Select which **Case** you would like this **Form** to be **Cloned** to. When checked, select **Clone**.



5. You do not need to **Save** this.

- Please note: If you would like to **Clone** a **Form** that has another **Status** other than **closed**. You cannot have two **Forms** that are the same in the same **Case**. Therefore, if you want to **Clone** a **Form** to the same **Case** ensure that you **Closed** that **Form** first and get that signed off by the appropriate **System User**.

The screenshot displays the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. A search bar and user profile 'CD V6 Team' are also visible. Below the navigation bar, a breadcrumb trail shows the path: 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. The main content area is titled 'Person Record' and shows details for 'TOM TEST (id: 444267)'. It includes fields for 'Born: 21/06/2022 (20 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A 'Menu' dropdown and 'Details' tab are present. The 'Details' tab is active, showing two sections: 'General' and 'Completion Details'. The 'General' section contains fields for 'Case*', 'Form Type*', 'Status*', 'Start Date*', 'Responsible Team*', 'Responsible User', 'Due Date', and 'Review Date'. The 'Completion Details' section contains fields for 'Completed By*', 'Signed Off By*', 'Completion Date*', and 'Signed Off Date*'. All fields are populated with data from the form.

General	
Case*	Tom, TEST - (21/06/2022) [CAS-000001-0087]
Form Type*	Adult Care and Support Plan
Status*	Closed
Start Date*	09/11/2022
Responsible Team*	CareDirectorTest
Responsible User	Scott Simpson
Due Date	11/11/2022
Review Date	
Preceding Form	
Completion Details	
Completed By*	Scott Simpson
Signed Off By*	Scott Simpson
Completion Date*	09/11/2022
Signed Off Date*	09/11/2022

How to reactivate a Closed Form

1. Locate the **Form** that needs to be **reactivated**.
Please note: If the same **Form Type** is open, you cannot **Reactivate** it.

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area shows the 'Person Record' for 'TOM.TEST (Id: 444267)'. The form details are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0010]
Form Type *	Occupational Therapy Conversation Record
Status *	Closed
Start Date *	10/11/2022
Responsible Team *	CareDirectorTest
Responsible User	Scott Simpson
Due Date	20/12/2022
Review Date	

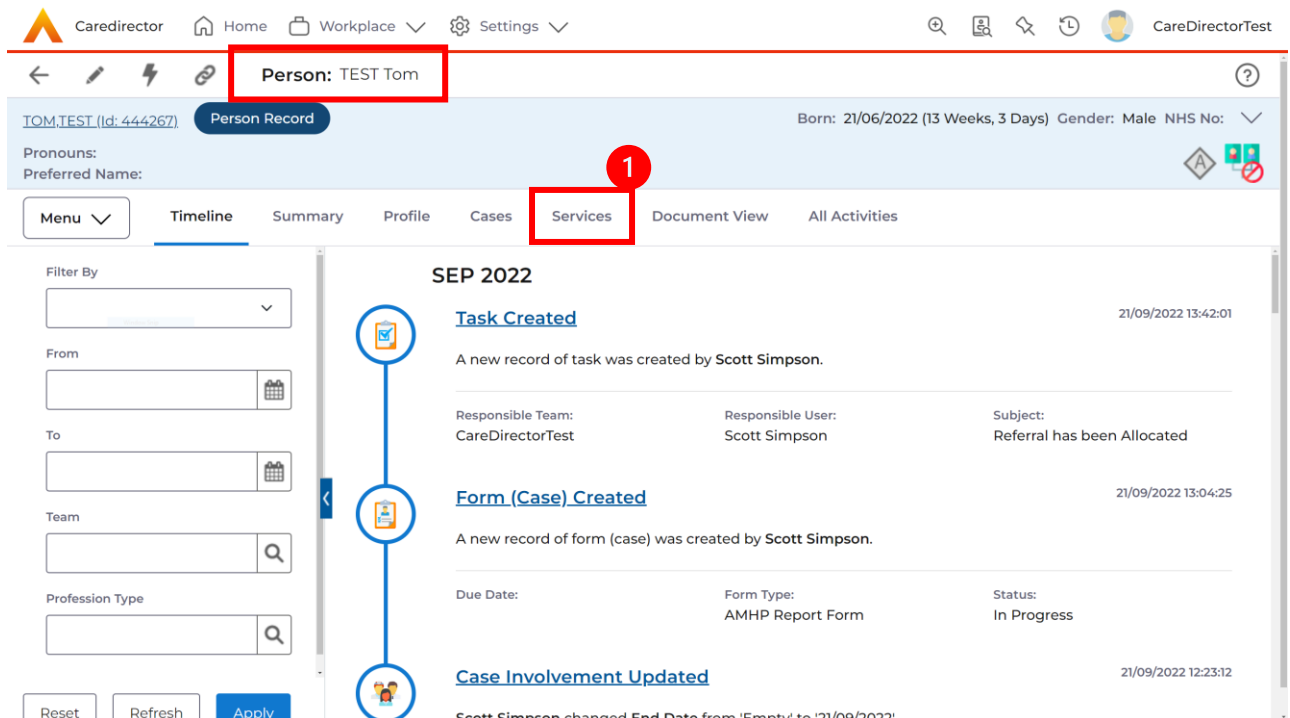
2. Select the **Three Dots** and select **Activate**.

This screenshot shows the same form as above, but with the three-dot menu open. The menu options are: Share, Assign, Clone, Restrict Access, **Activate**, Delete, Run Workflow, and Copy Record Link. The 'Activate' option is highlighted with a red box and a '2' in a red circle. The form details remain the same as in the previous screenshot.

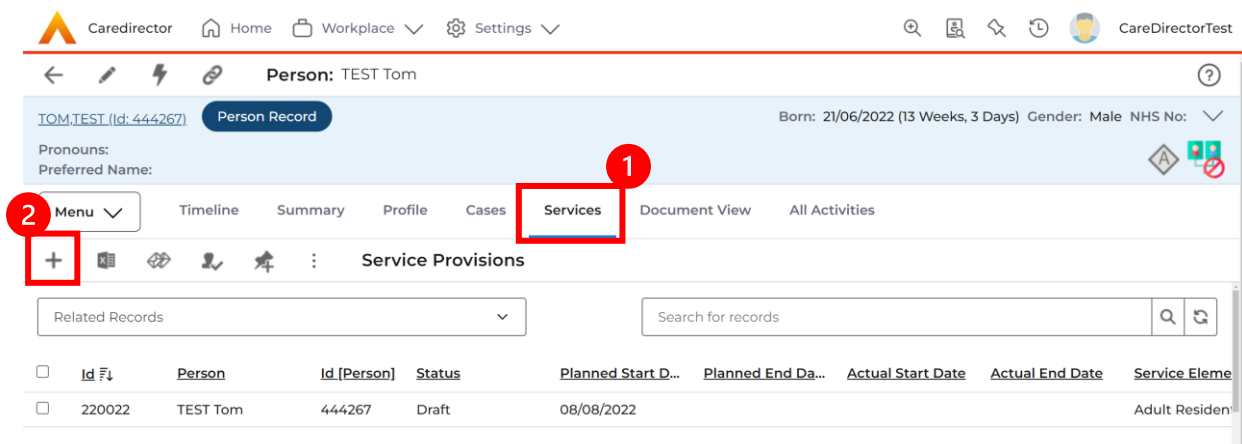
How to input Service Provisions

Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.
2. Select the relevant **Person Record** and select **Services**.



3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



4. Then follow the appropriate section to complete the **Service Provision**.

How to Authorise a Service Provision

1. Locate the **Service Provision** and make sure the **Status** is **Ready for Authorisation**. If it is not, then go into the record and change the **Status** to **Ready for Authorisation** then select **Save**.

The screenshot shows the 'Service Provision' record for Tom Jones. A modal window titled 'Service Provision Statuses' is open, allowing the user to change the status. The modal contains a search bar and a table of status options:

Name	Code	Gov C
<input type="checkbox"/> Draft	1	
<input type="checkbox"/> Booking Request	20	
<input type="checkbox"/> Validation Required	30	
<input type="checkbox"/> Waiting List	40	
<input type="checkbox"/> Rejected	50	
<input checked="" type="checkbox"/> Ready for Authorisation	60	

Red callouts indicate: 1. The 'Draft' status in the background record. 2. The 'Ready for Authorisation' status in the modal. 3. The 'OK' button in the modal. 4. The 'Service Provision' title bar.

2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise**.

The screenshot shows the 'Person Record' for Tom Jones. The 'Services' tab is active, displaying a grid of service provisions. A context menu is open over the second row, with 'Authorise' highlighted. Red callouts indicate: 1. The 'Services' tab. 2. The 'Person' column header. 3. The 'Authorise' menu item. 4. The selected row.

Id	Person	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1
220015	TEST Tom	24/06/2022				Adult Residential Care
<input checked="" type="checkbox"/> 220012	TEST Tom	24/06/2022				SDS - WMDC Managed Account

How to input Service Deliveries

1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022'. The main header area displays the user's name 'MULLENTEST, Tom (Id: 444264)', a 'Person Record' button, and personal details: 'Born: 03/05/1955 (67 Years) Gender: Male NHS No:'. A tabbed interface below the header has 'Service Deliveries' selected, indicated by a red circle '1'. To the left of the 'Service Deliveries' tab is a toolbar with a '+' icon, also highlighted with a red circle '2'. Below the toolbar is a search bar for records and a table header with columns: 'Person', 'Id', 'Planned Start Ti...', 'Units', 'Total Units', 'Total Visits', 'Monday', 'Tuesday', and 'Wedr'. The table content area displays 'NO RECORDS' with the message 'No results were found for this screen.'

2. Now select the information required. **Units** is based around **1** being a **1 of the Rate Unit**. For example, if your **Rate Unit** shows **Per 1 Hour Unit** then you put **Units** as **1** this will record that each visit will be **1 hour long**. If it says **0.5** it will be **half an hour each visit**.
3. **Planned Start Time** is the time that the visit takes place on the chosen dates. If more than one visit is required and at different times, then when **Saved** create a new **Service Delivery**.
4. Once **Saved**, this will automatically generate **Total Visits/ Total Units**.

Caredirector Home Workplace Settings CD V6 Team

Service Delivery: TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2...

TOM.TEST (Id: 444267) Person Record Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:
 Pronouns: Preferred Name:

Menu Details Variations

General

Service Provision * TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088...	Responsible Team * CareDirectorTest
Id * 188114	Rate Unit * Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time * 09:00	Units * 1.0000
Total Visits * 7	Total Units * 7.0000
Number of Carers * 1	

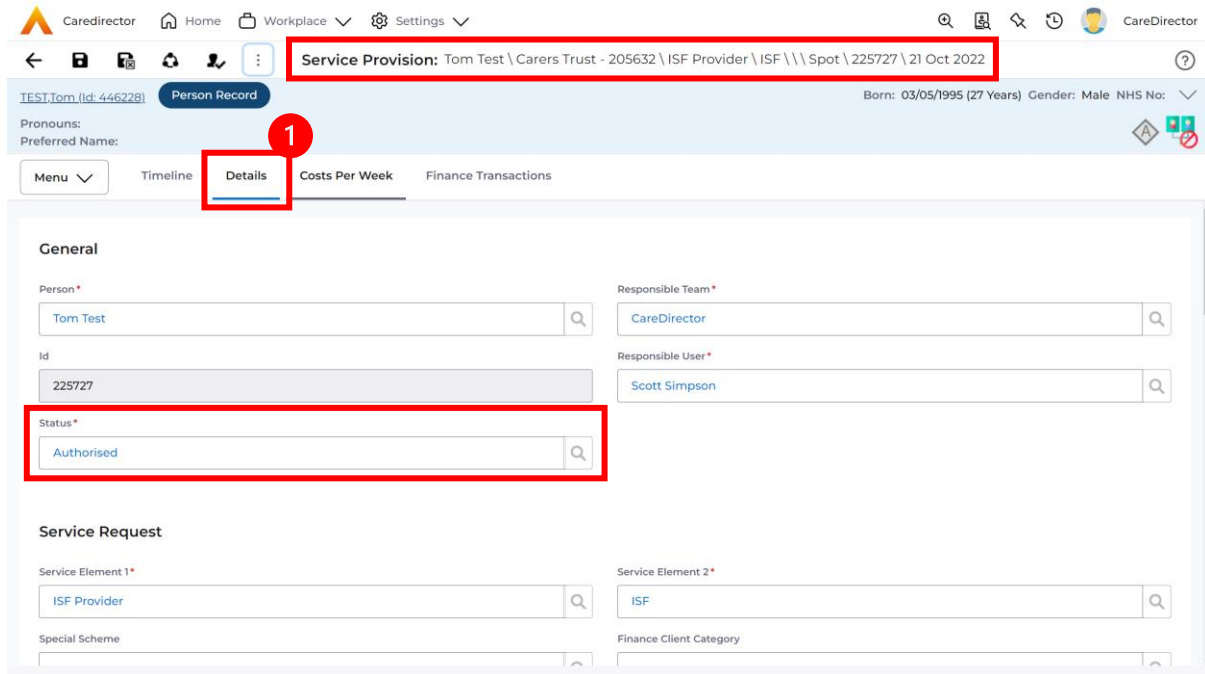
Schedule applies to days

Select All * <input checked="" type="radio"/> Yes <input type="radio"/> No	Thursday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Monday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Friday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Tuesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Saturday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Wednesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Sunday * <input checked="" type="radio"/> Yes <input type="radio"/> No

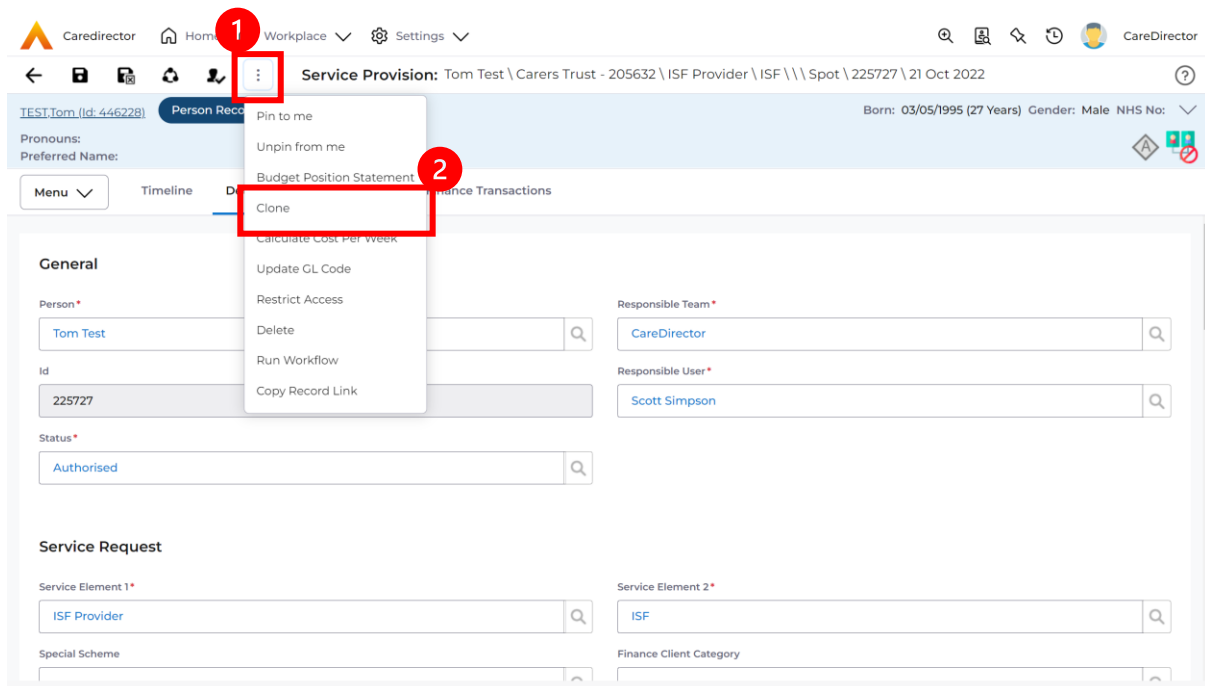
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

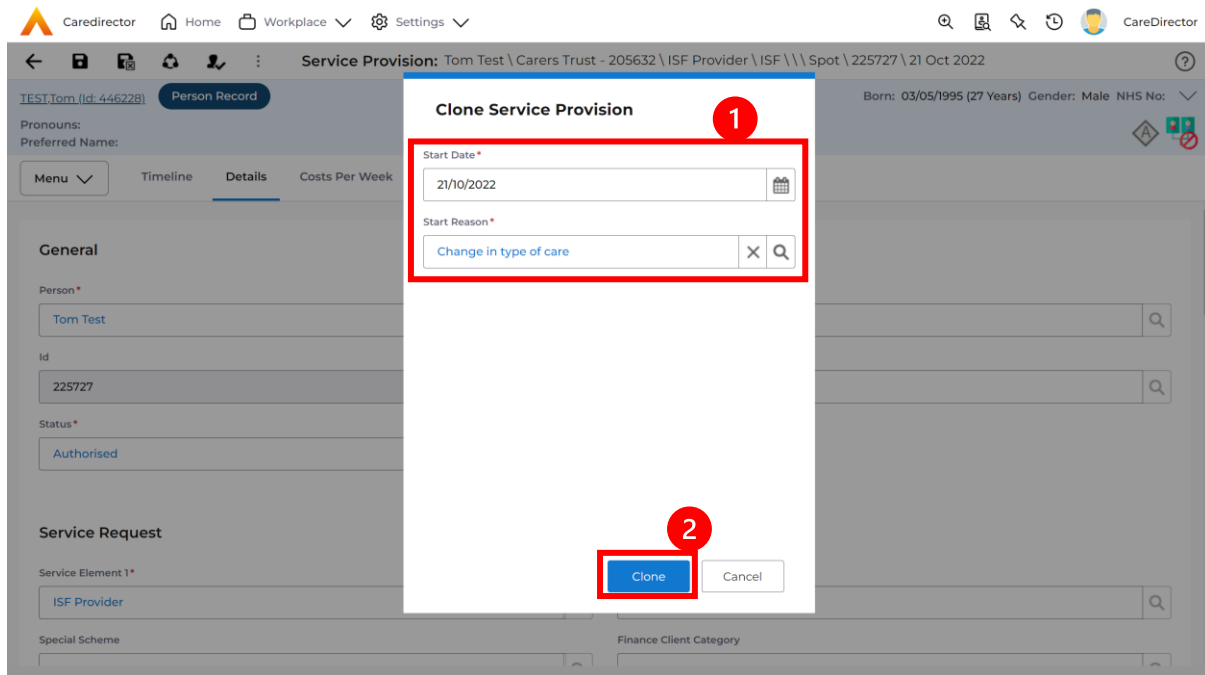
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



2. Select the **Three Dots** from the toolbar and select **Clone**.



3. Select the new **Start Date** and **Start Reason** and select **OK**.



How to End Service Provisions

1. Locate the **Service Provision** that requires an end date. Select the **Details** tab, scroll down to the **Dates** heading and enter an **Actual End Date** and **End Reason**. When finished, select **Save**.

The screenshot shows the CareDirector interface for a service provision. The breadcrumb trail is: Service Provision: TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju... The 'Details' tab is selected. The 'Dates' section contains the following fields:

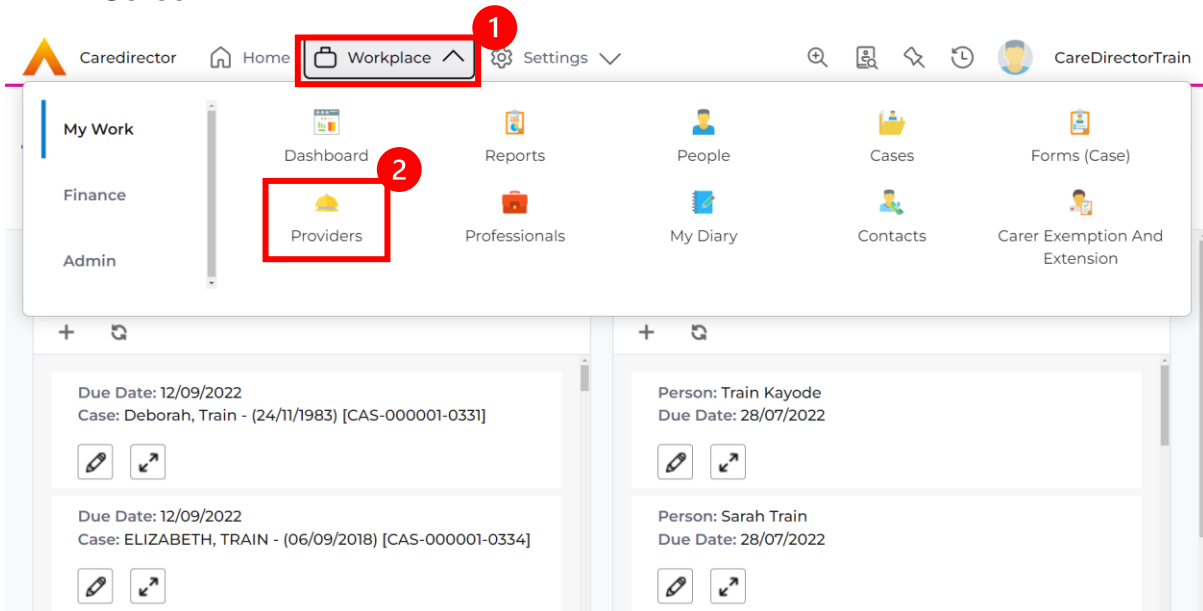
Field	Value
Planned Start Date	24/06/2022
Planned End Date	
Actual Start Date	
Actual End Date	21/10/2022
Start Reason*	New Placement
End Reason*	Carer's Decision

The 'Commissioning' section contains the following fields:

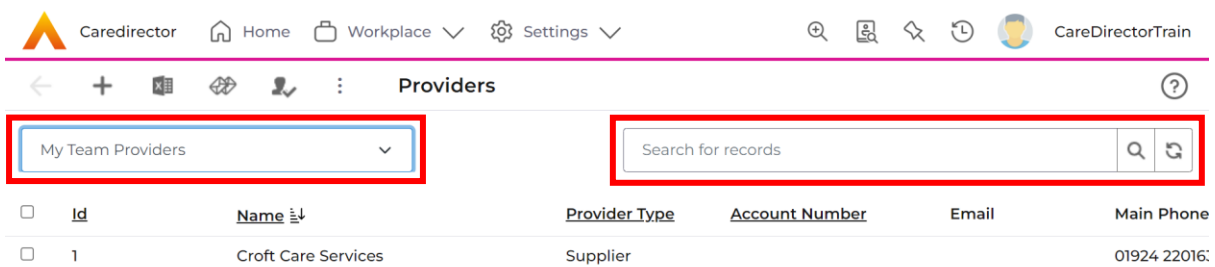
Field	Value
Purchasing Team	Adults Connecting Care Team East
Frequency in Weeks*	1

How to search for a Provider

1. Select **Workplace**, then **Provider**. This will open the **Provider Search Screen**.

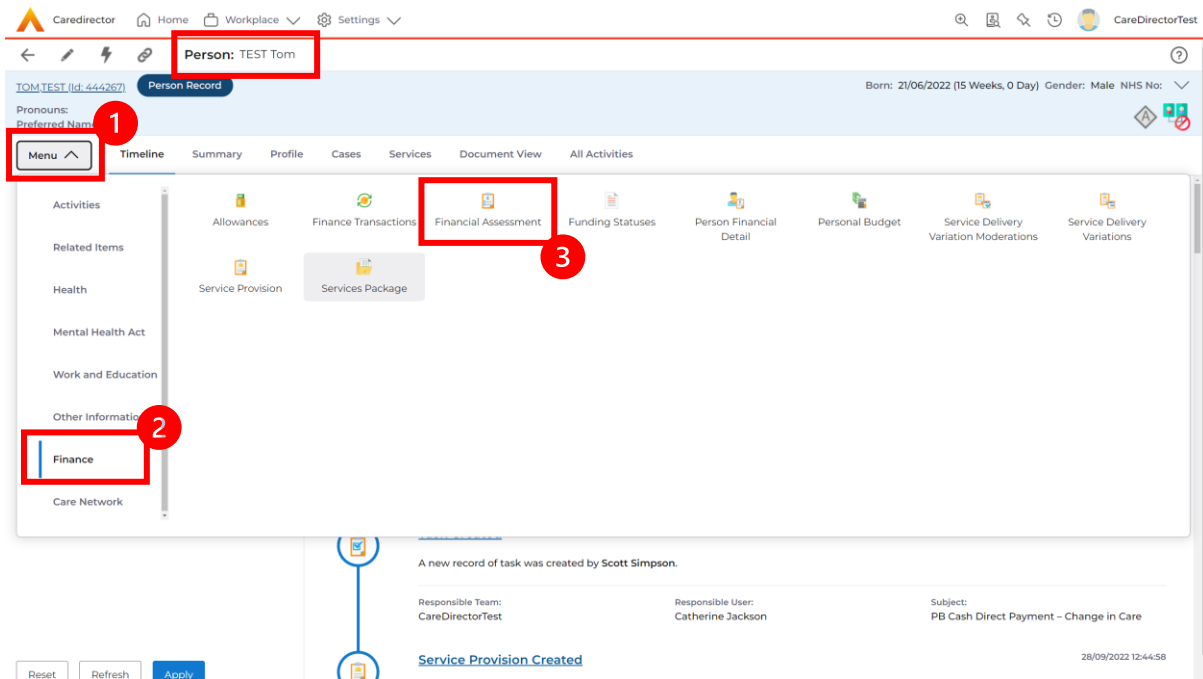


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

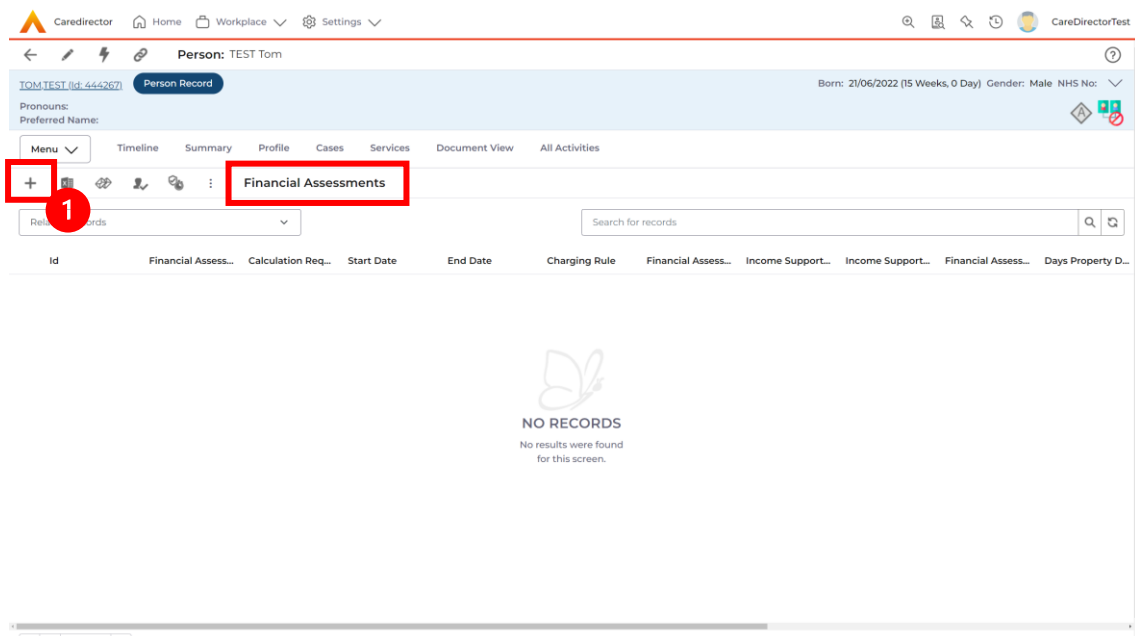


Where to find Financial Assessments

1. Locate the **Person Record** to create/ view a **Financial Assessment** on.
Select **Menu**, **Finance** then select **Financial Assessment**.



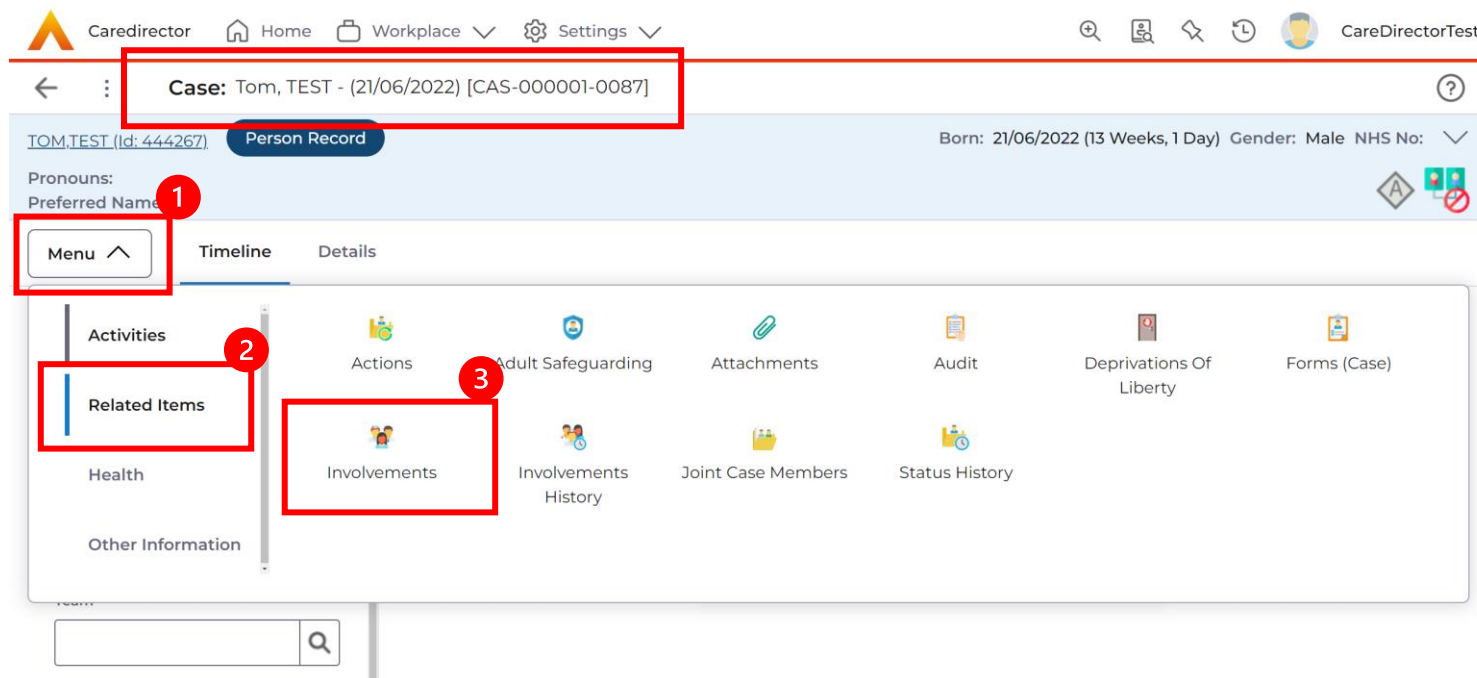
2. Once there, to view an existing **FA** select it, however select the **Create New Record** function from the toolbar.



How to close a Case

Ending Secondary Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.
2. Only the secondary and external **Involvements** need to have an end date. The **Responsible User/ Team** will automatically end once the **Case** has been **closed**.
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements**.



4. Open the relevant entry by double clicking an open space. This will open the involvement.

Caredirector Home Workplace Settings CareDirectorTest

← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] ?

TOM,TEST (Id: 444267) Person Record Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:
 Pronouns: Preferred Name:

Menu Timeline Details

+ Case Involvements

Related Records Search for records

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	End Date	Create
<input type="checkbox"/>	Community Occupatio...	Occupational Th...		Tom, TEST - (21/06/2022) [CAS-000001-0087]	CareDirectorTest	21/09/2022		Scott

5. Enter today's date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Secondary and External Involvements** are ended.

The screenshot displays the CareDirector interface for a Case Involvement. The top navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus, along with search, user profile, and notification icons. The main header shows the current case: "Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...". Below the header, a "Menu" dropdown and a "Details" tab are visible. The main content area is titled "General" and contains several form fields:

- Case***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team***: CareDirectorTest
- Person***: TEST Tom
- Involvement Member***: Community Occupational Therapy Service
- Role***: Occupational Therapist
- Start Date***: 21/09/2022
- Involvement Reason**: (empty)
- End Date**: 21/09/2022 (highlighted with a red box and a red circle with '1')
- Involvement End Reason**: (empty)
- Involvement Review Date**: (empty)

The "Description" field is partially visible at the bottom.

6. If the Case cannot be closed, there will be ongoing work associated with the Case.

Close an Open Activity

1. Select **Menu** within the **Case Record**. Then select **Activities** and open the relevant location of an activity.

The screenshot displays the CareDirector interface for a case record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the patient information section shows 'TOM,TEST (Id: 444267)' and 'Person Record'. The 'Menu' button is highlighted with a red box and a circled '1'. The 'Activities' button in the left sidebar is highlighted with a red box and a circled '2'. The main content area, which includes 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks', is highlighted with a red box and a circled '3'. Below the main content area, there are several input fields for 'Responsible User', 'Responsible Team*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By*', and 'Archive Date*'.

2. Open the relevant location of an activity has been opened. Select the **Activity** that needs to be closed from the options.

Caredirector Home Workplace Settings CareDirectorTest

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (Id: 444267) Person Record Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name: [dropdown]

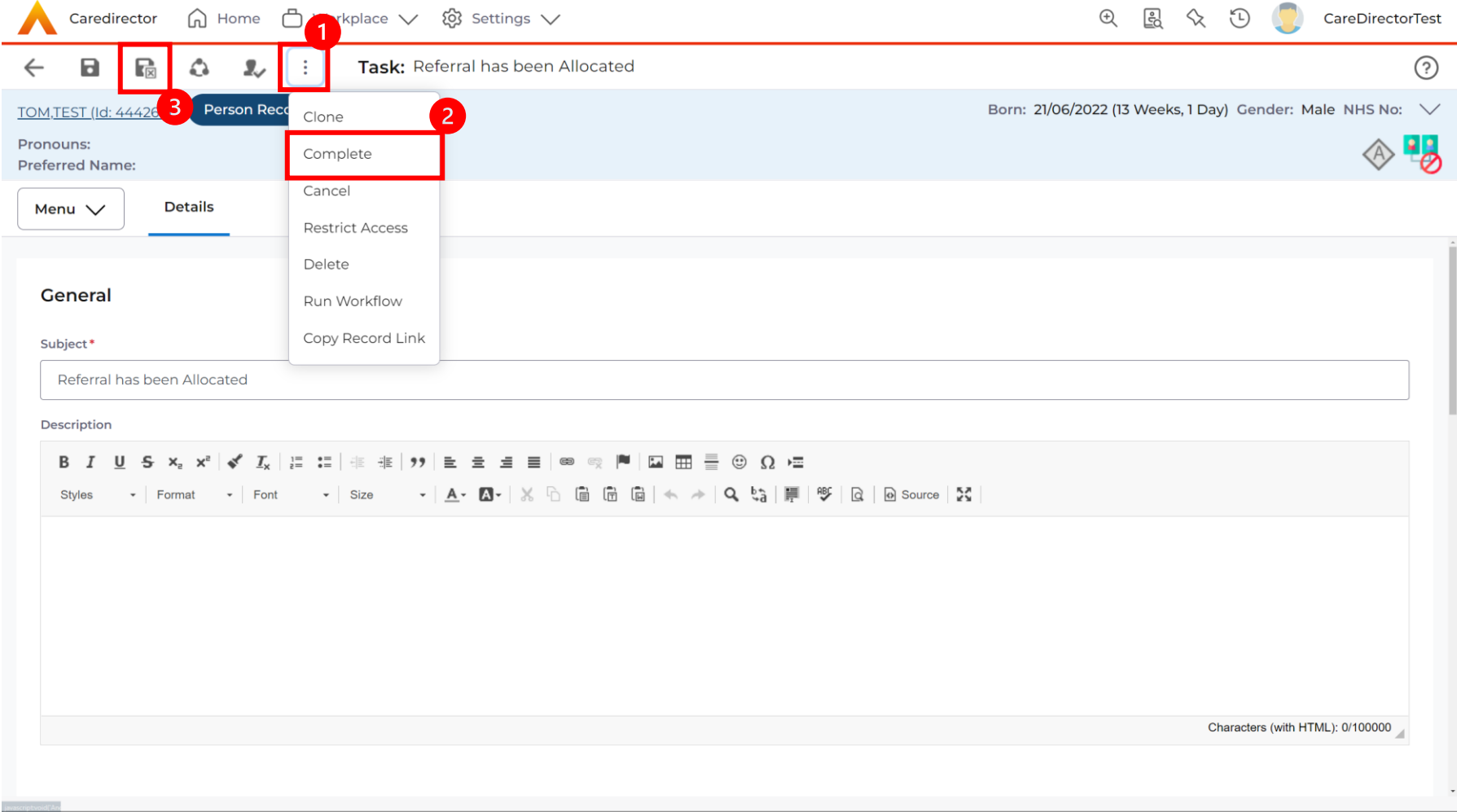
Menu Timeline Details

Tasks

Related Records [dropdown] Search for records [input] [search] [refresh]

<input type="checkbox"/>	Subject	Due [dropdown]	Status	Regarding	Reason	Responsible Team	Responsible User
<input type="checkbox"/>	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom, TEST - (21/06/2022)...		CareDirectorTest	Scott Simpson

3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page**.



Closing a Case

- 1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.

Caredirector Home Workplace Settings

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (Id: 444267) Person Record Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Pronouns: Preferred Name:

Menu Timeline **Details**

Assignment Information

Case Status*
Assign To Team

Case Priority

Responsible User

Responsible Team*
AMHP Coordinator

Review Date

2. Select the **Lookup** function next to the **Case Status** field.

Caredirector Home Workplace Settings

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Menu Timeline **Details**

Assignment Information

Case Status *
 2

Case Priority

Responsible User

Responsible Team *

Review Date

3. This will open a new window, to select a relevant option. Then select **OK**.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main content area displays a case record for 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. A modal window titled 'Case Statuses' is open, prompting the user to 'Enter your search criteria.' The modal includes a 'Look in' dropdown menu set to 'Social Care Case Status Lookup View' and a search input field. Below the search field is a table of case statuses:

	Name	Code	Gov C
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		
<input type="checkbox"/>	Closed		
<input checked="" type="checkbox"/>	Closed & Logged As Enquiry		
<input type="checkbox"/>	Closed as a Contact		
<input type="checkbox"/>	Closed Under Review		
<input type="checkbox"/>	Closure Request Rejected		
<input type="checkbox"/>	Closure Requested		
<input type="checkbox"/>	Enquiry led by other		

At the bottom of the modal, there are navigation controls for 'Page 1' and a total count of '1 - 13'. The 'OK' button is highlighted with a red box, and a 'Close' button is also visible.

- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot displays the CareDirector interface for a 'Person Record' of TOM TEST (ID: 444267). The page title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is logged in as 'CareDirectorTest'. The 'Assignment Information' section is highlighted with a red box and contains the following fields:

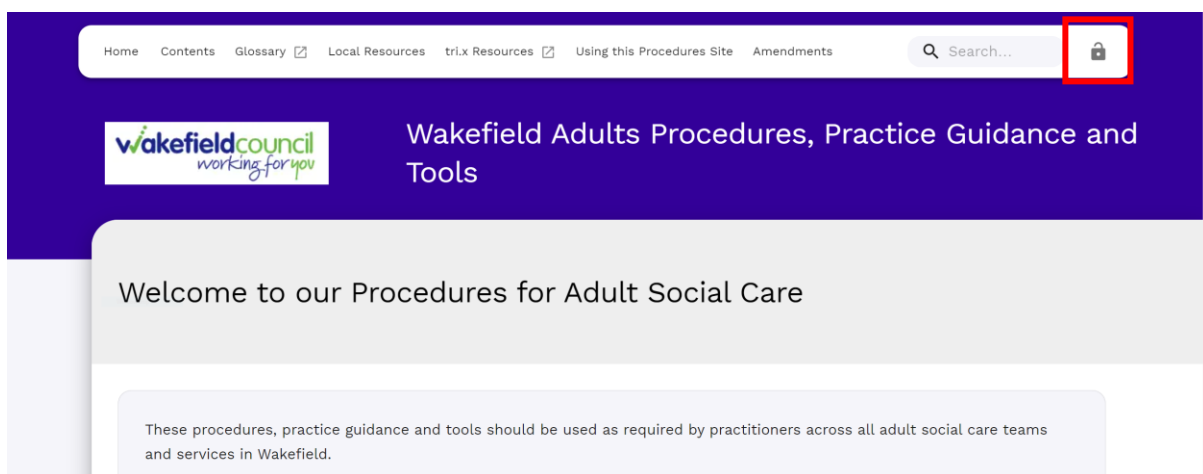
- Case Status***: Closed
- Case Priority**: (Empty)
- Responsible User**: (Empty)
- Responsible Team***: AMHP Coordinator
- Review Date**: (Empty)
- Last Assigned to Team Date**: 20/09/2022
- Close Date***: 03/10/2022 13:43
- Closure Reason***: All Work Completed
- Closure Accepted By***: Scott Simpson
- Archive Date***: 28/10/2022

Below the highlighted section is the 'Other Information' section, which includes 'Re-Referral' and 'Non-Migrated Worker Name' (both empty).

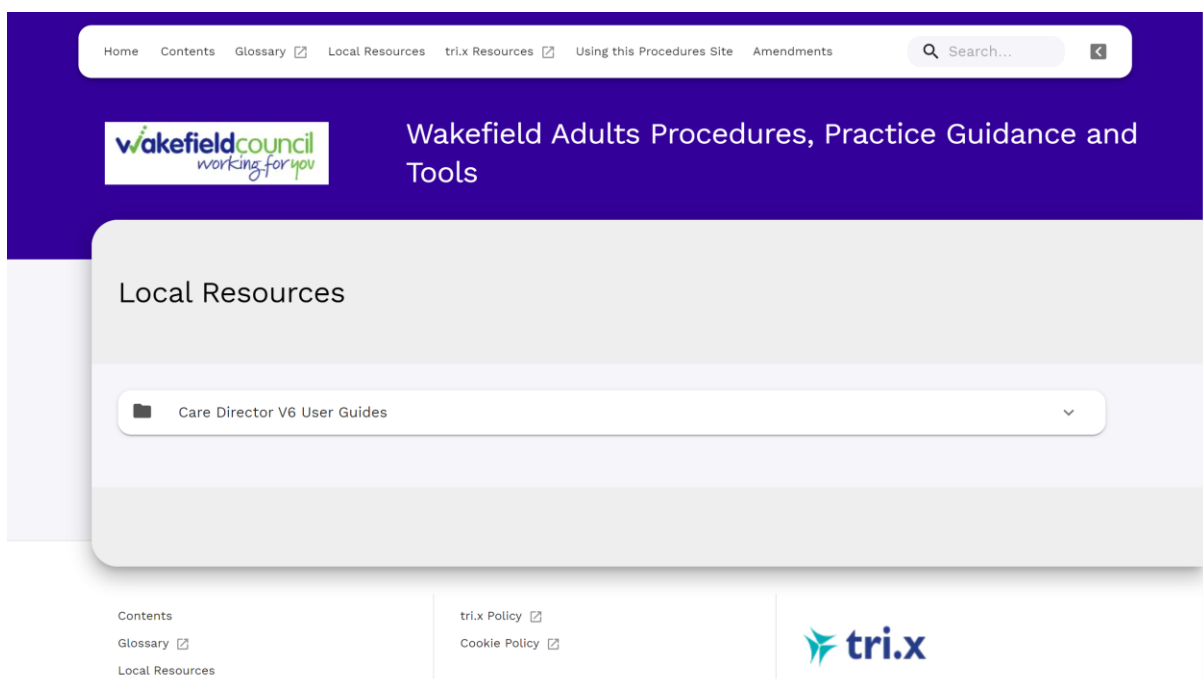
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

Further CareDirector Guidance

1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.
2. Go to **Microsoft Edge** and copy and paste this URL:
 - a. <https://wakefieldadults.proceduresonline.antser.com/>
3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	14/10/2022
V1.0.1	Secondary Allocation	Scott Simpson	18/11/2022