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

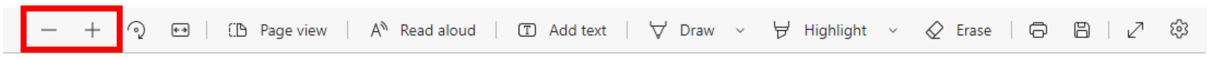
Guide Information

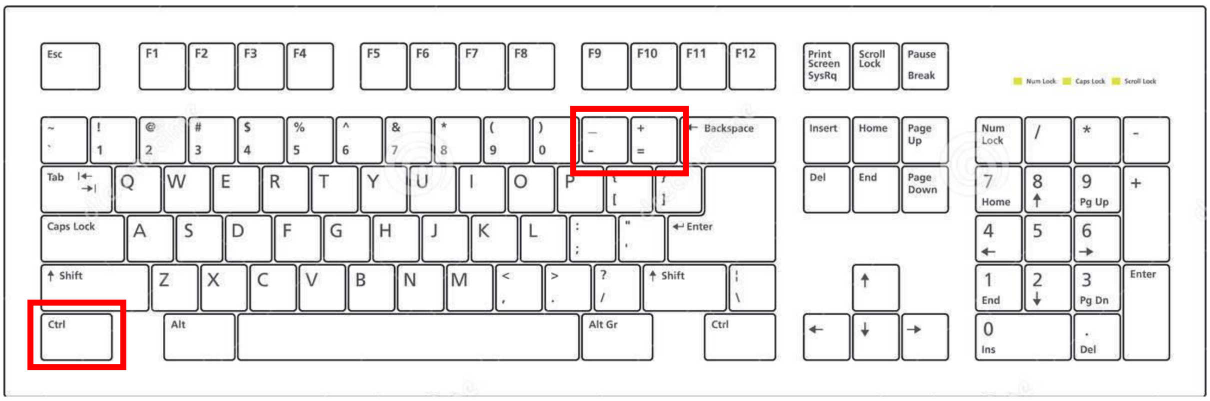
Before Live Access…

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.

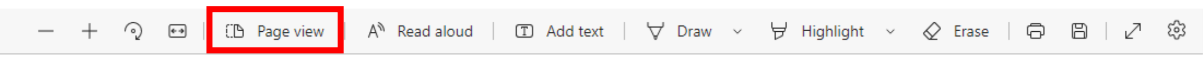
Guide Navigation

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.

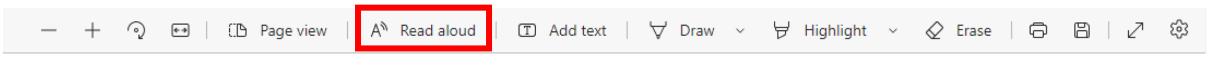




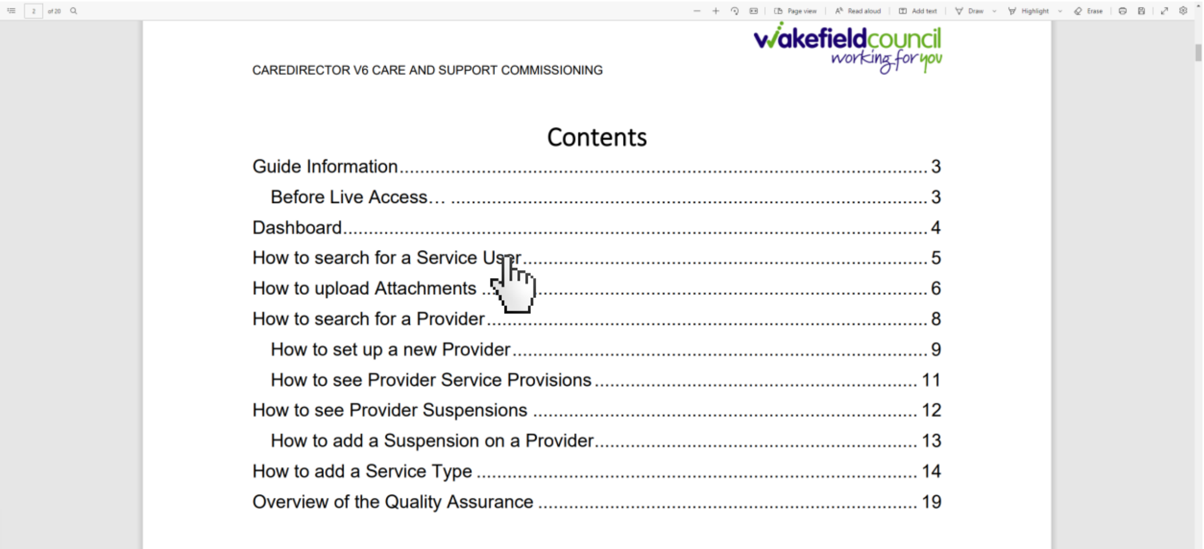
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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

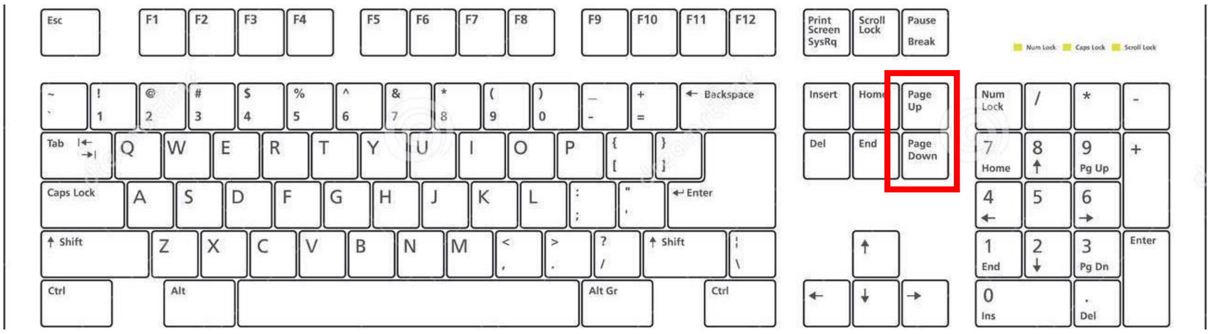


5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

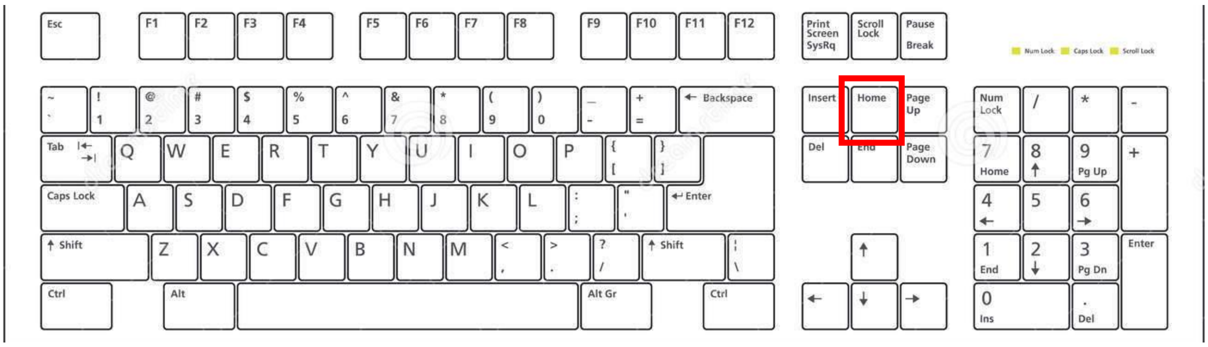

CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

Contents

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.

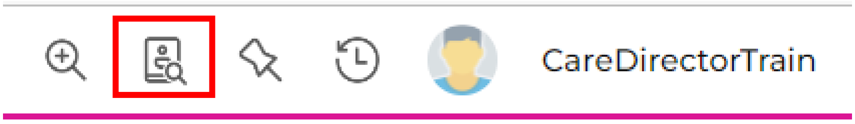


7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.

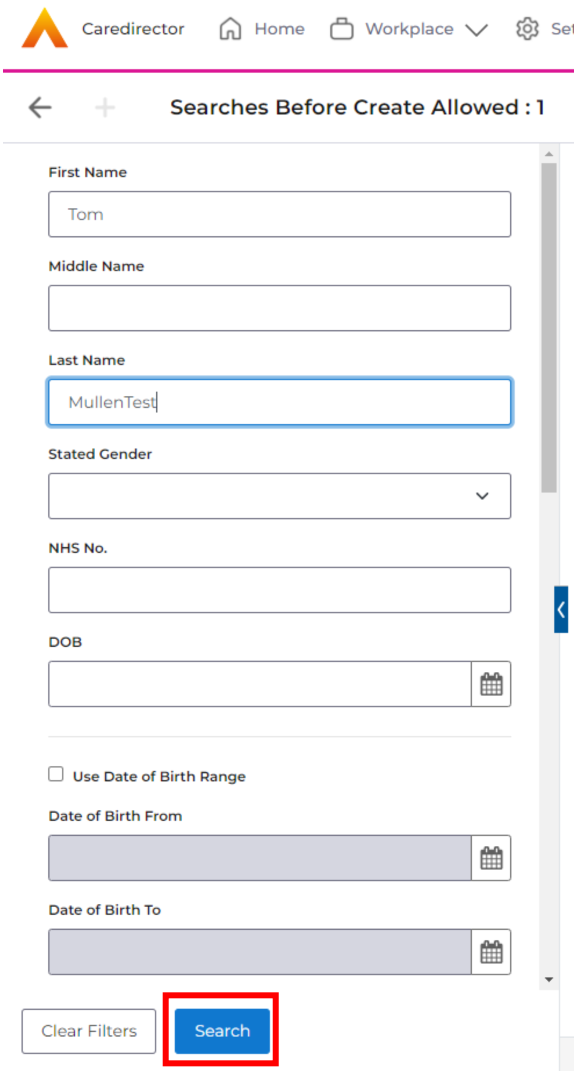


How to search for a Service User

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



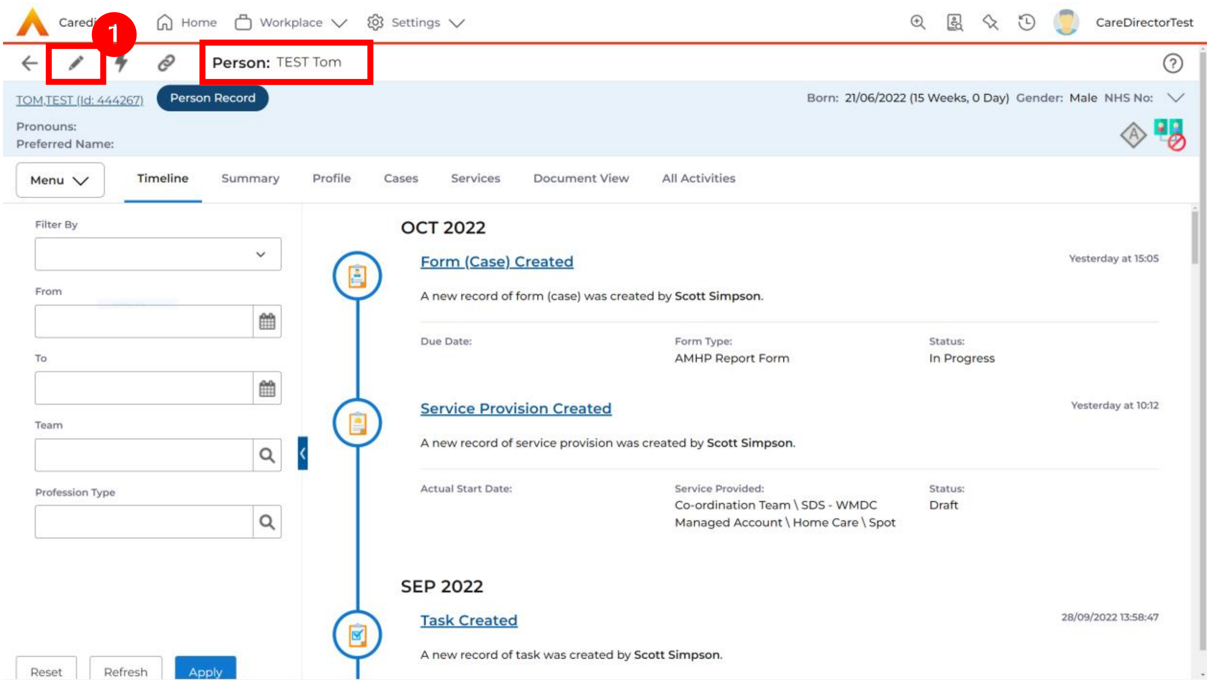
2. Enter their details provided. When finished, select **Search**.



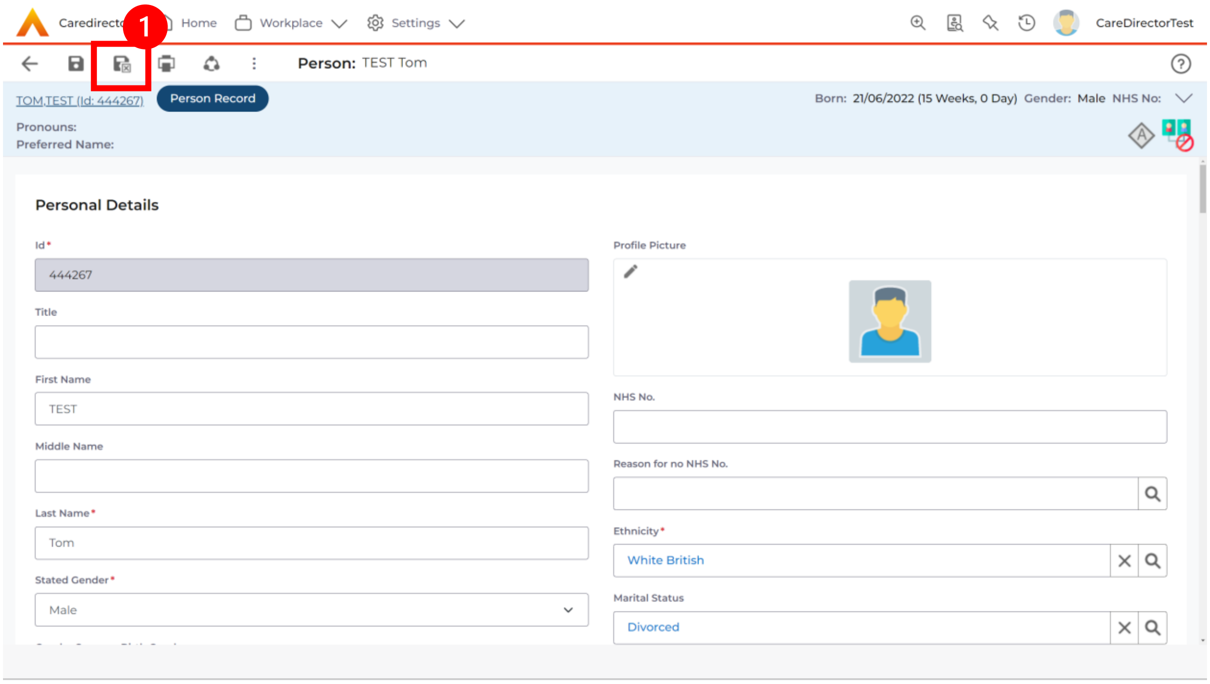
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

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

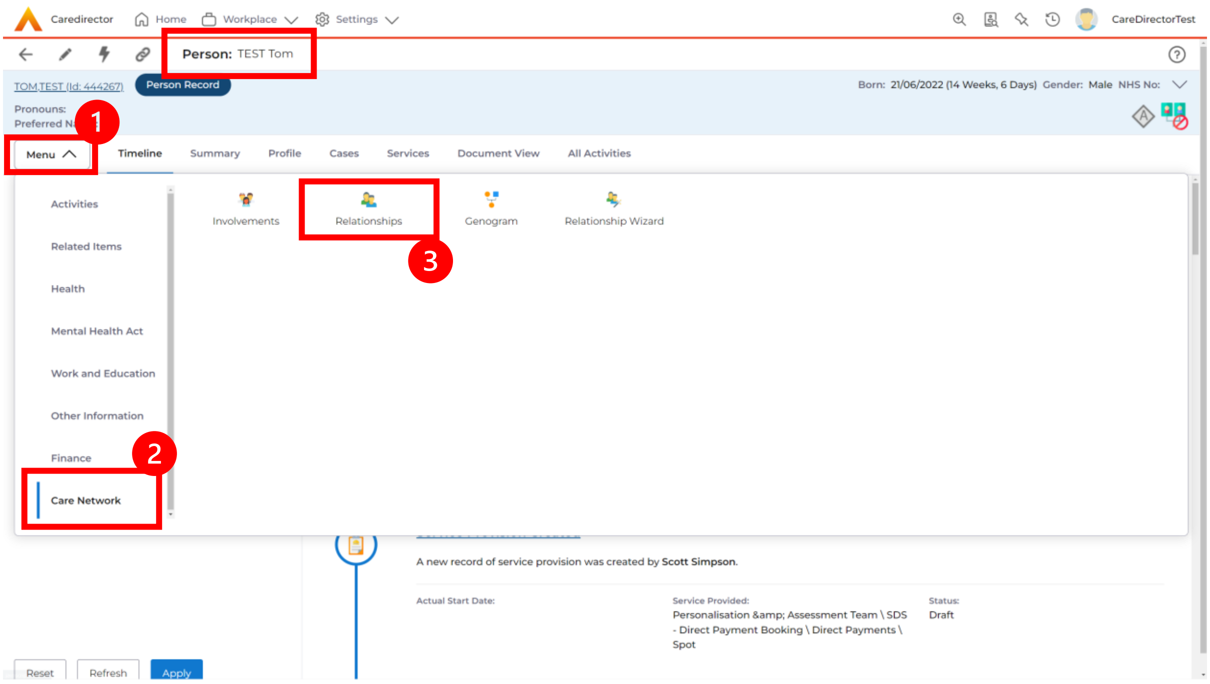


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

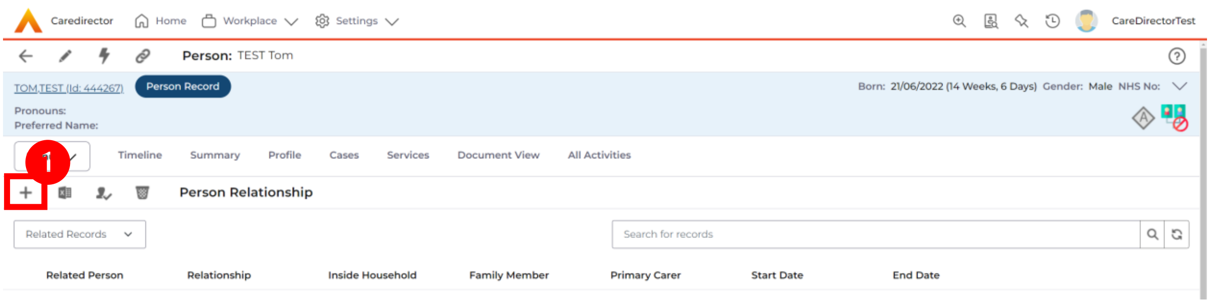


How to add relationships

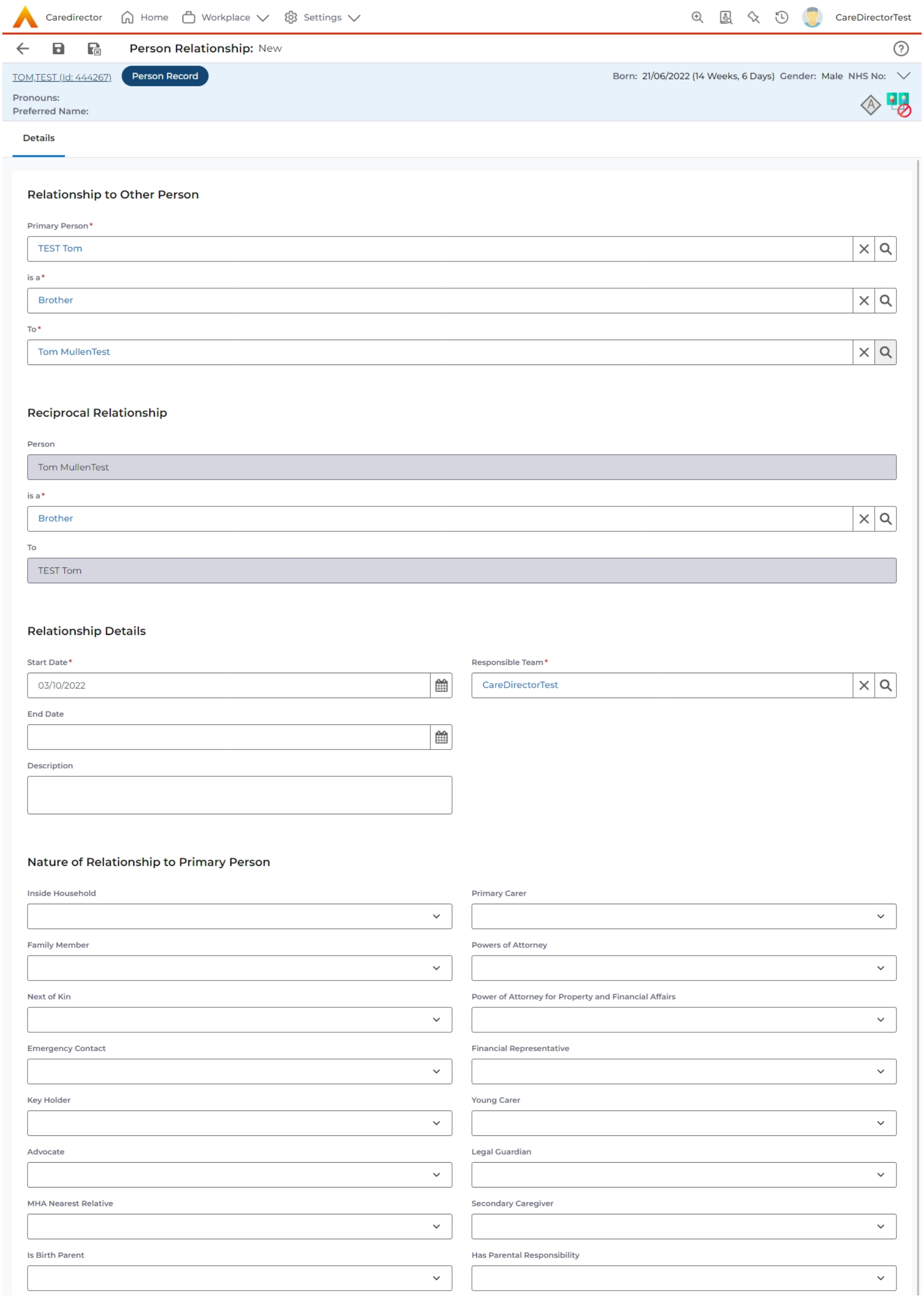
1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships.**



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



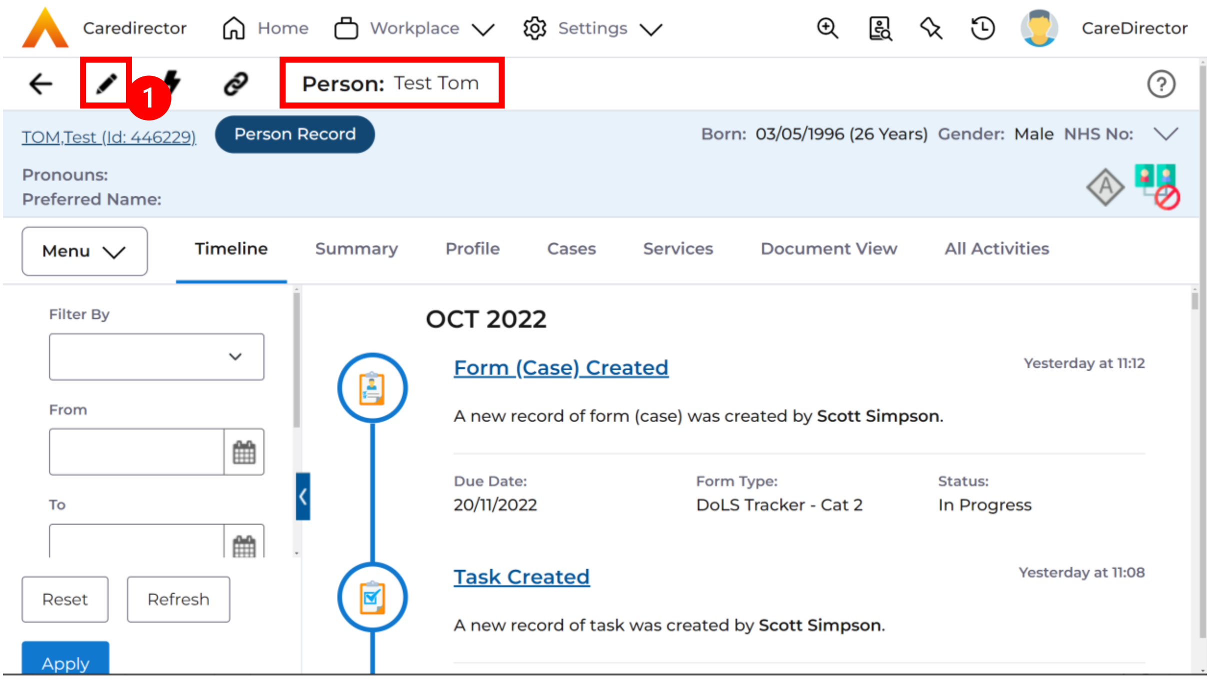
3. Inside this section:
   a. The **Service User** will be the **Primary Person**.
   b. **Is a** field, is what the **Primary Person** is **to** the other **Service User**.
   c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on 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.



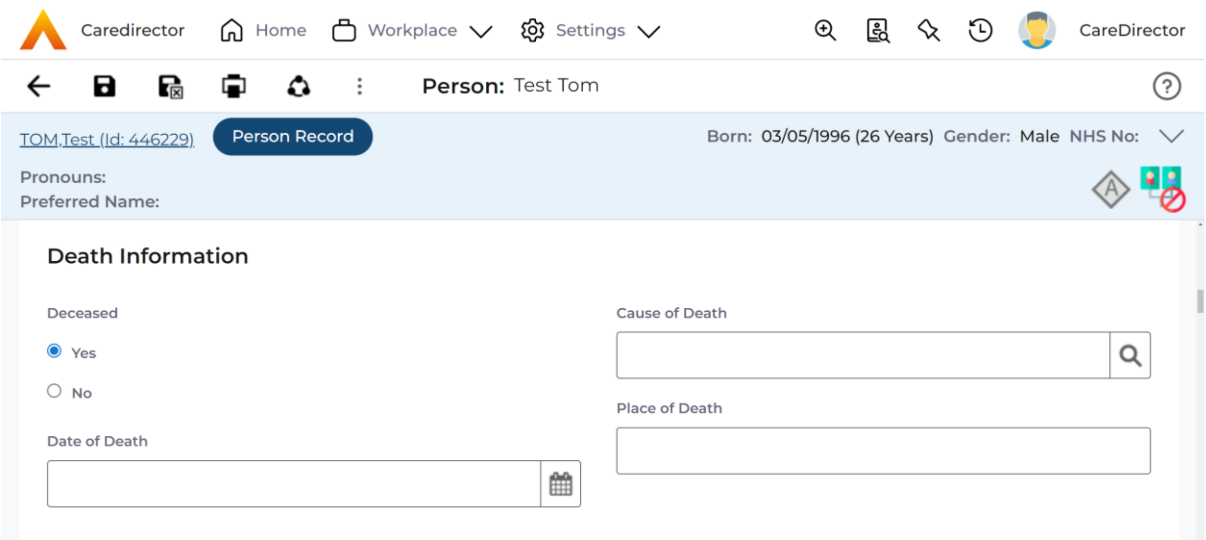
4. When finished, select **Save and Return to Previous Page.**

How to Enter Date of Death

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



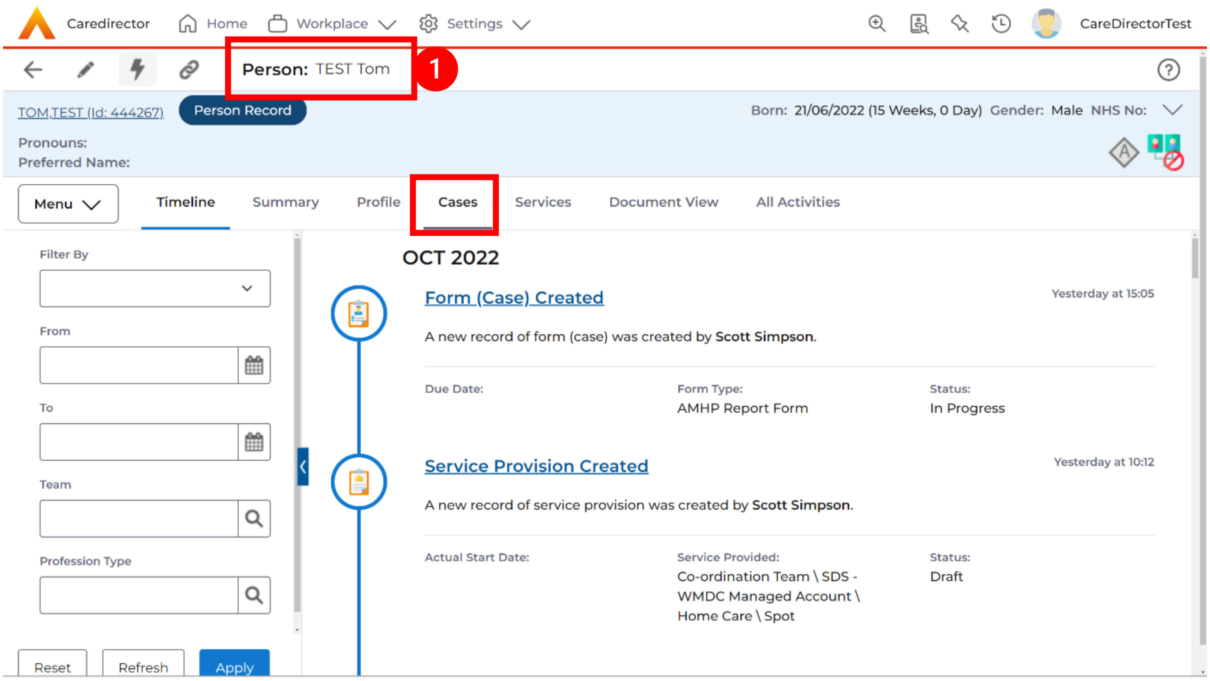
2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes.**



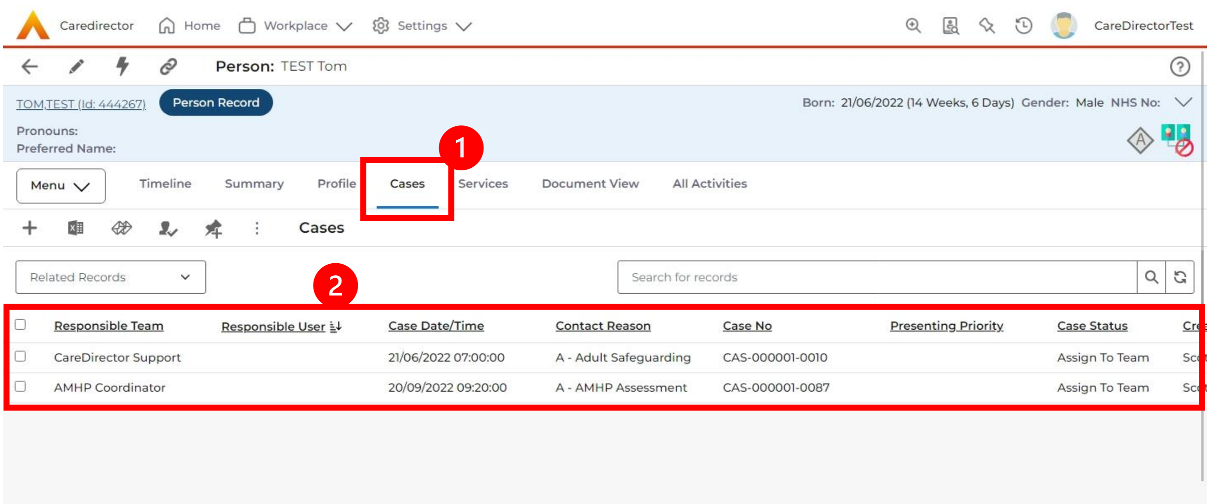
3. Enter in the details if known, when finished select **Save.** This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker.**

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.**

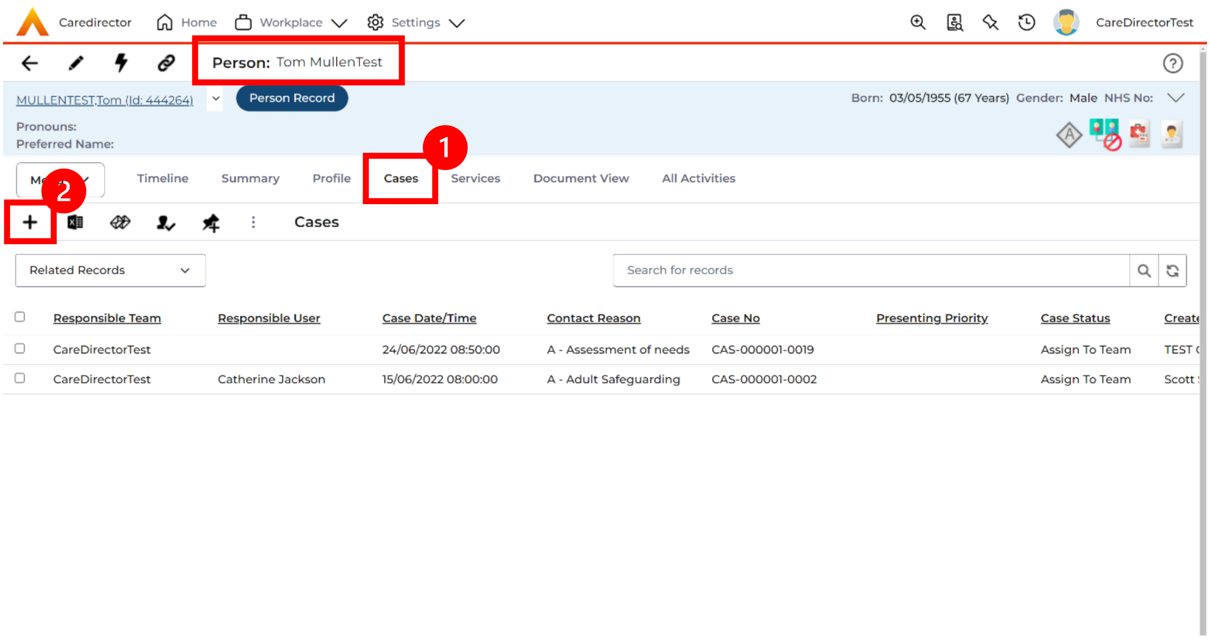


2. When found, select it to open the **Case Record**.

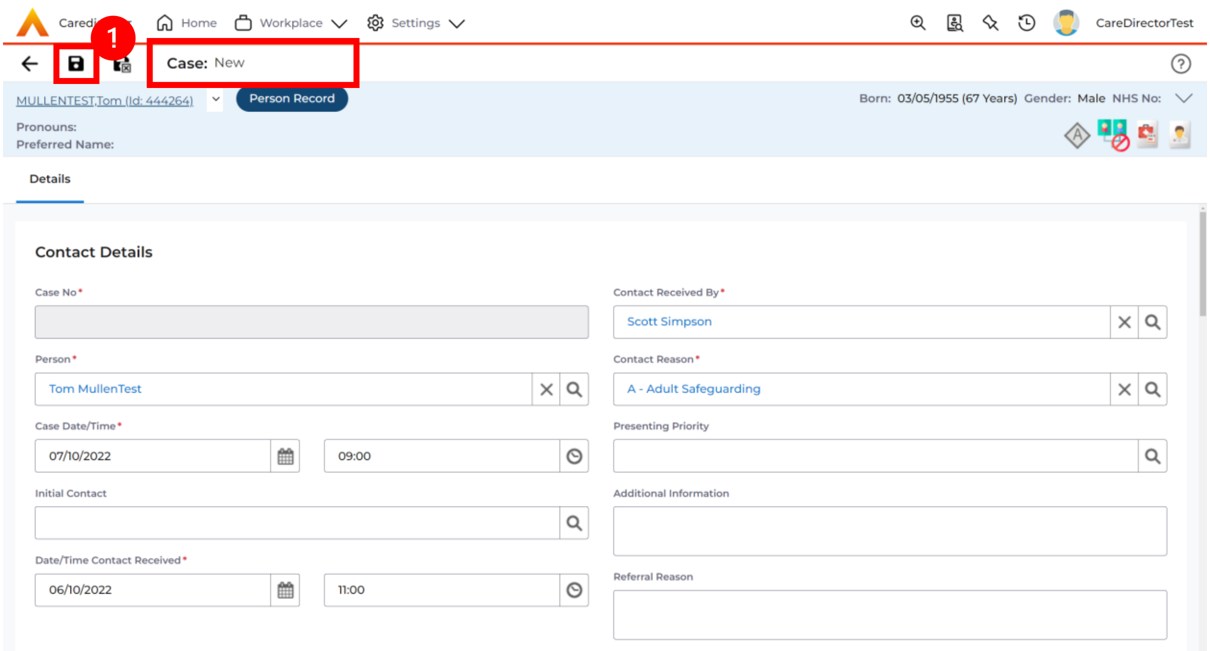


How to create a Case

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

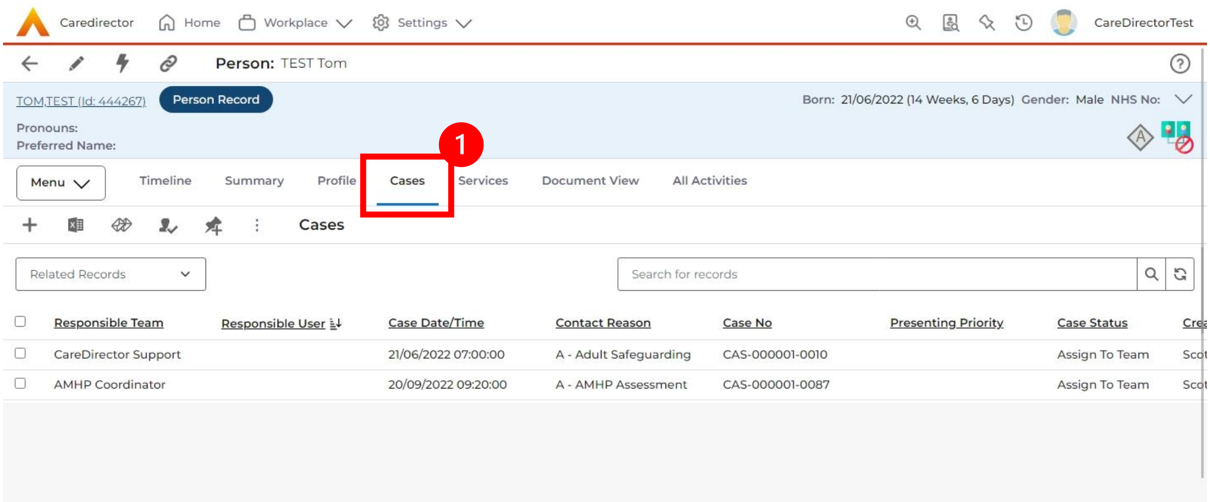


2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

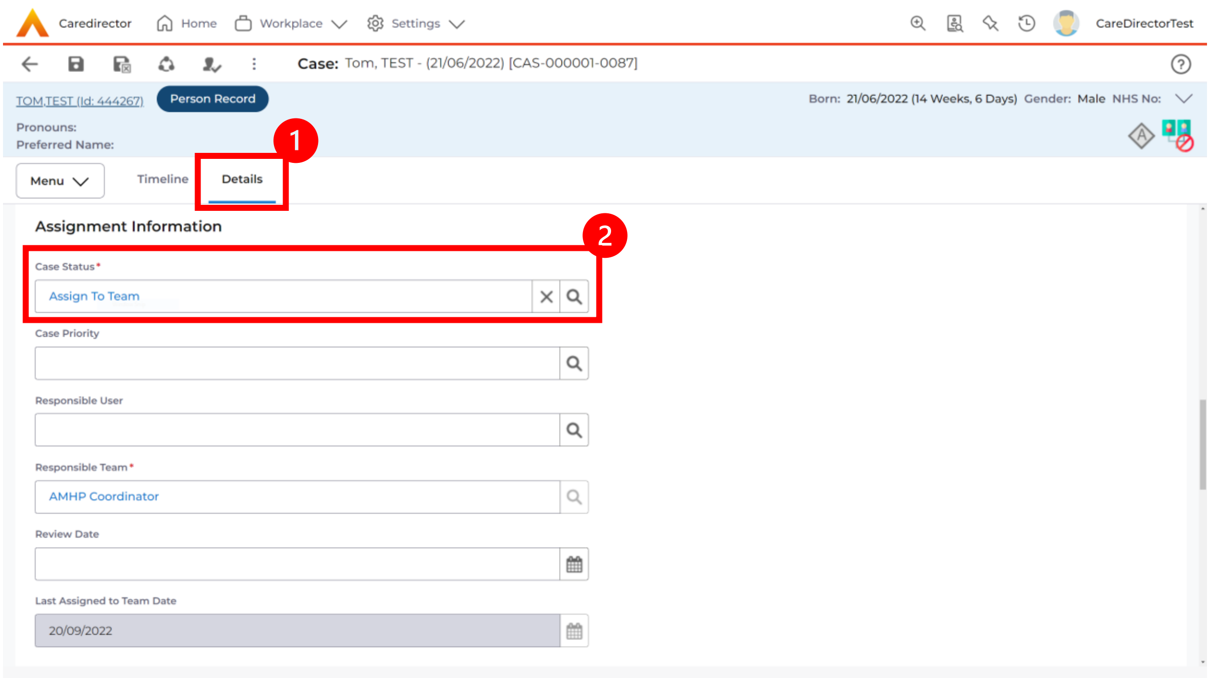


How to check the Case Status

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

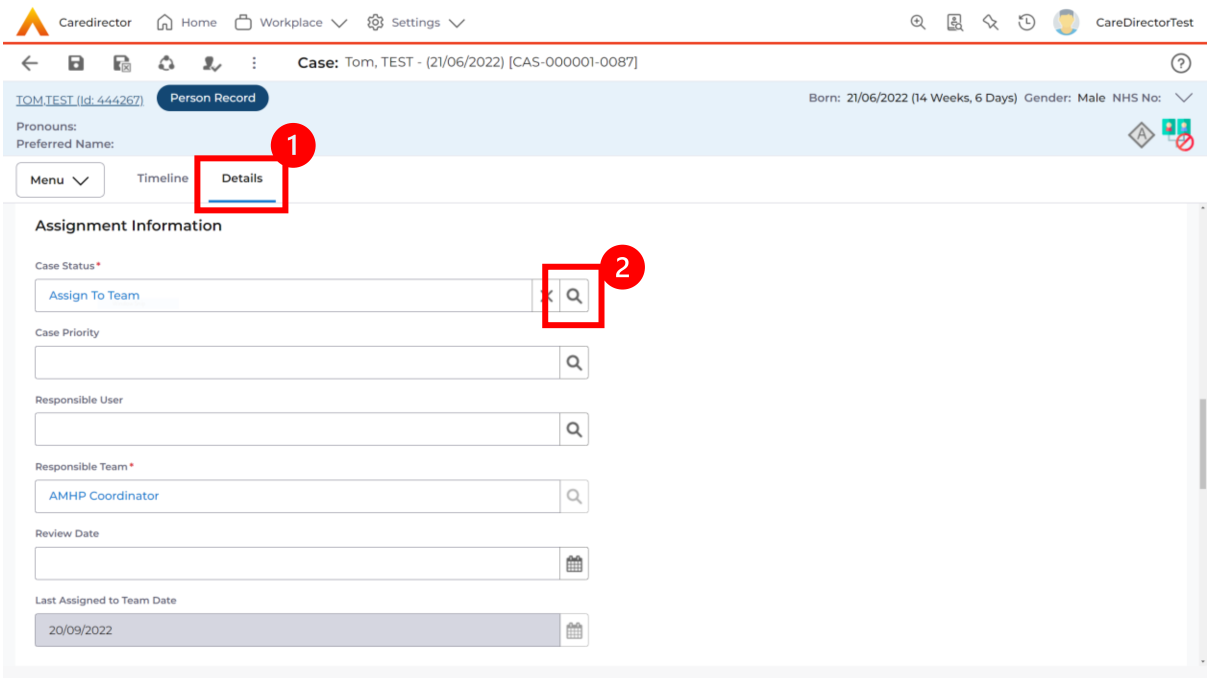


2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case** is **Allocated, Closed Under Review, etc.**

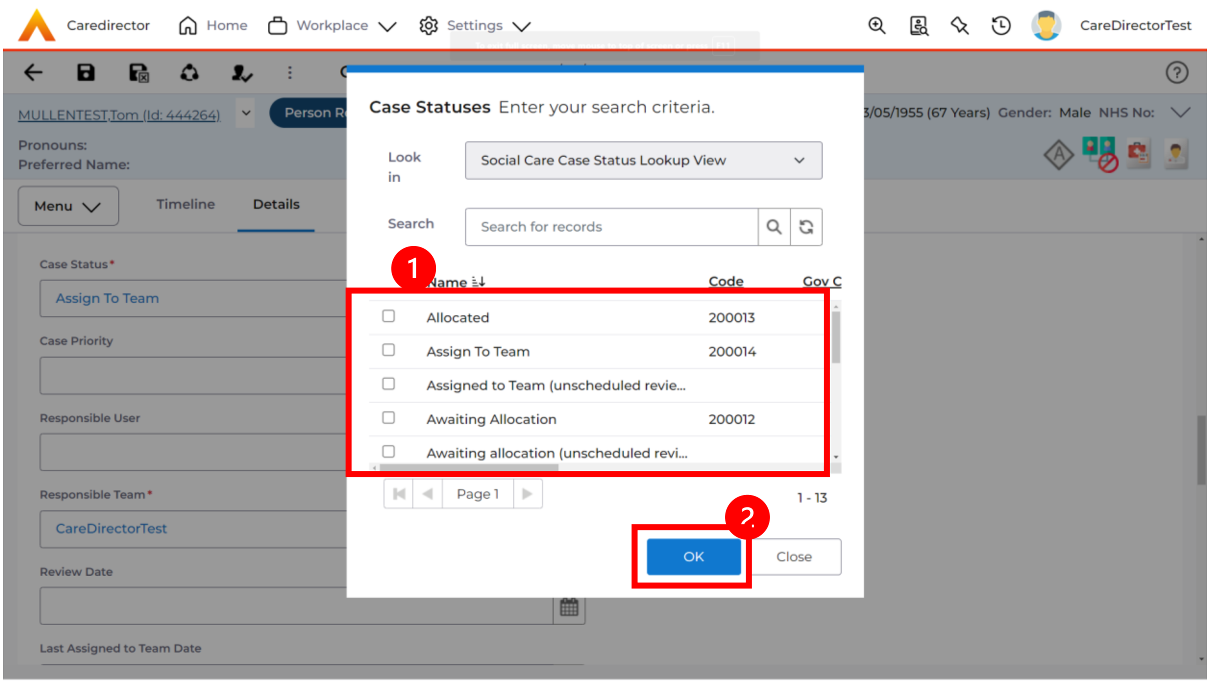


How to change the Case Status

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



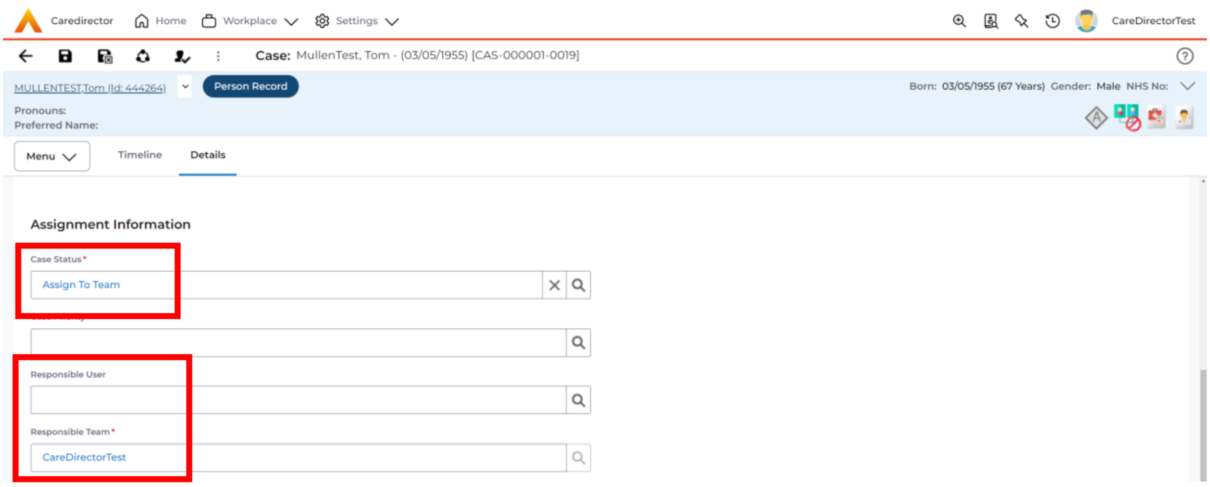
2. Choose the relevant option and select **OK** when found. Select **Save.**



How to Allocate a Case to a Worker

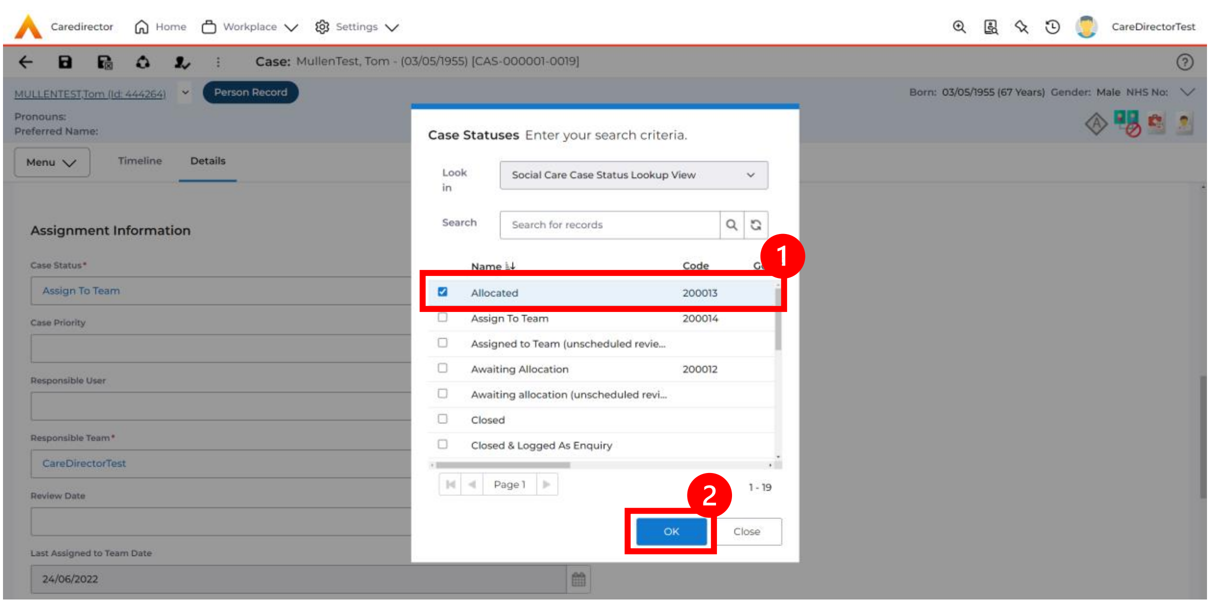
1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route.**

2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.

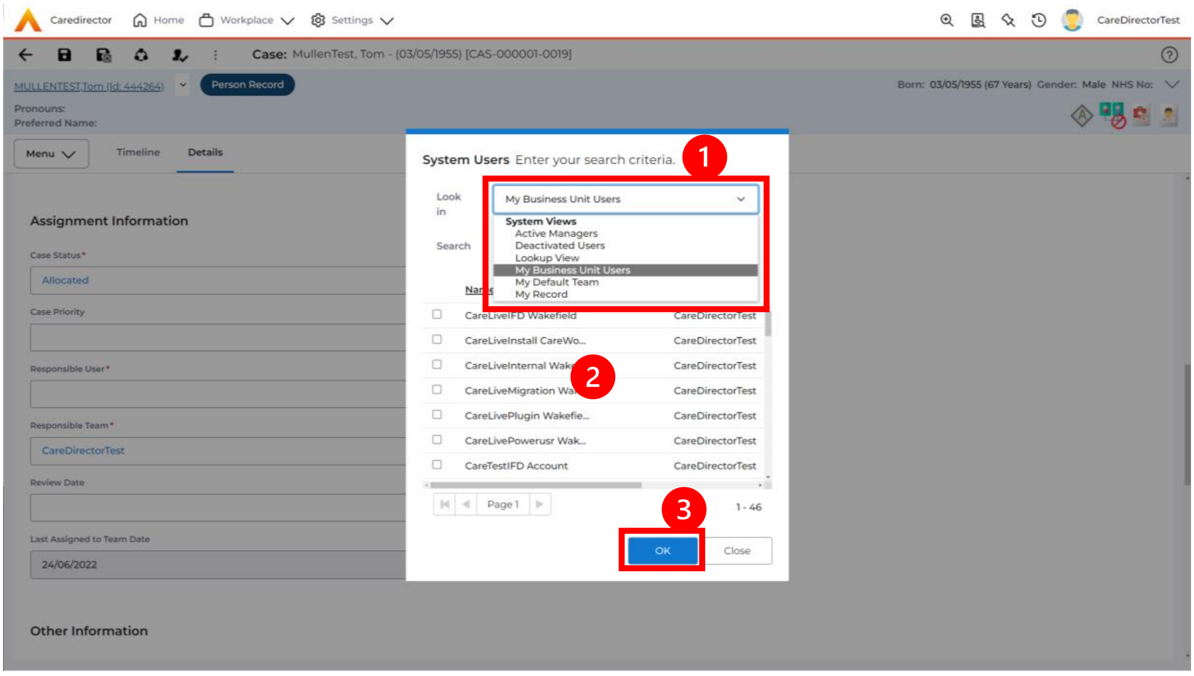


3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.

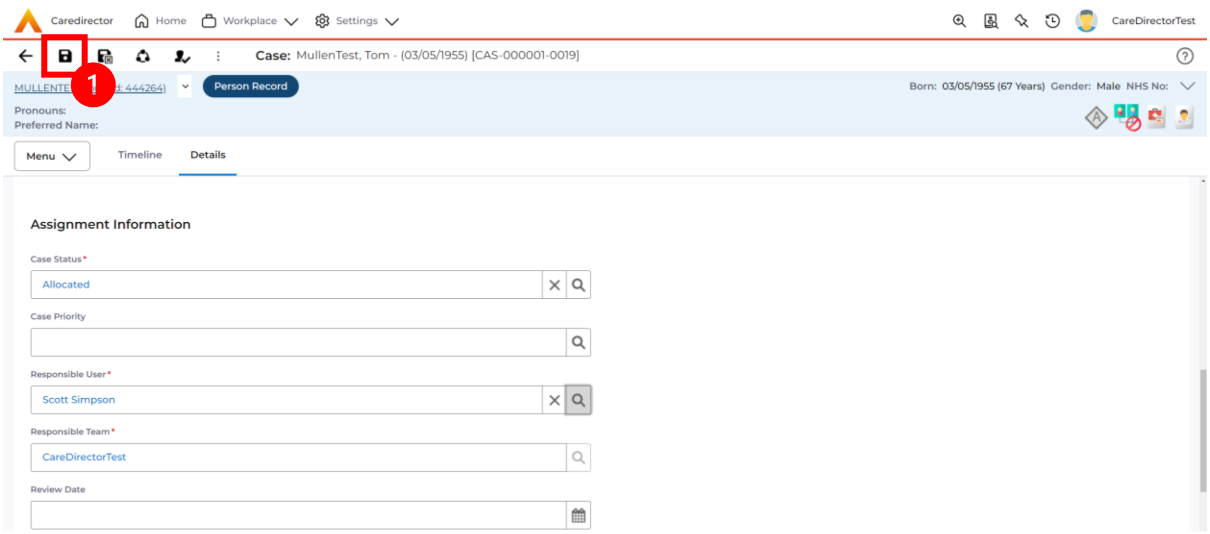
4. First select the **Lookup function** on the **Case Status** field and select **Allocate**. Then select **OK**.



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



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

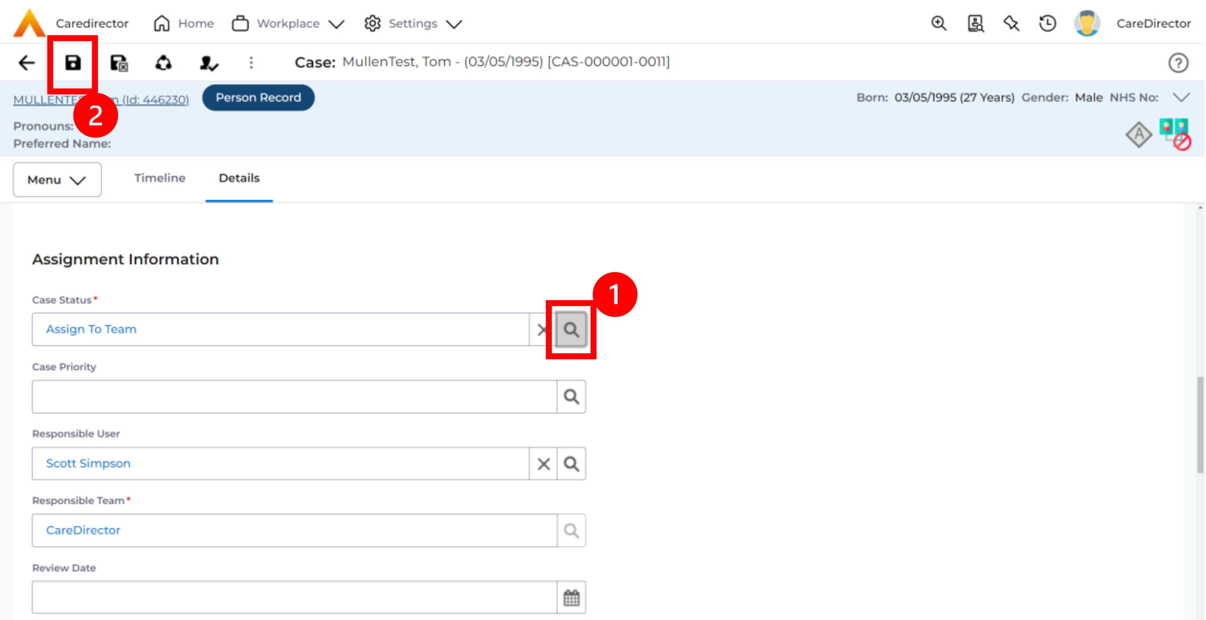


How to send a Case to another team

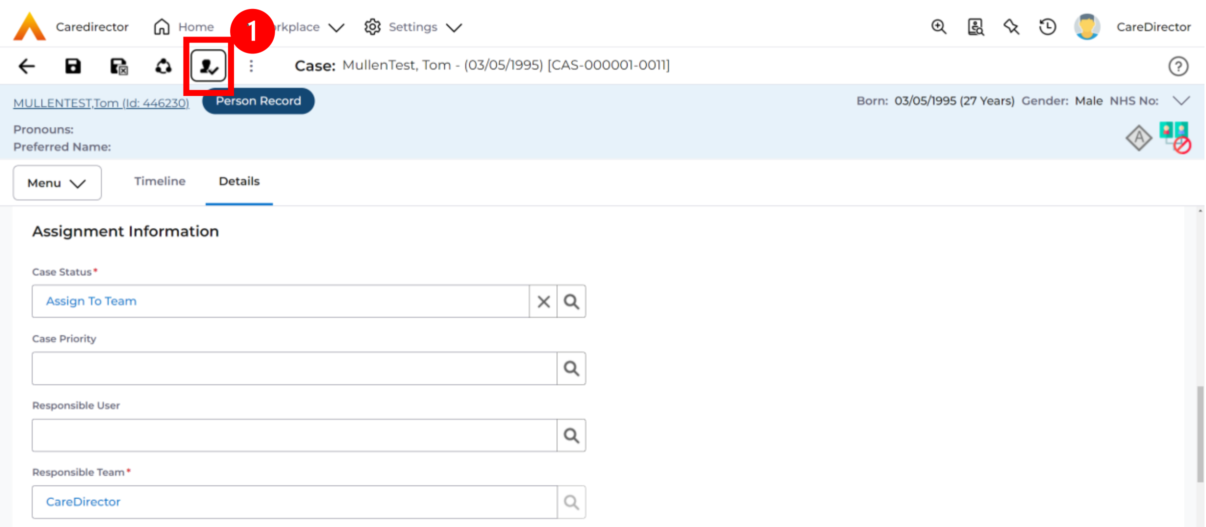
1. There may be reasons that a **Case** needs to be sent to another team.

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**.

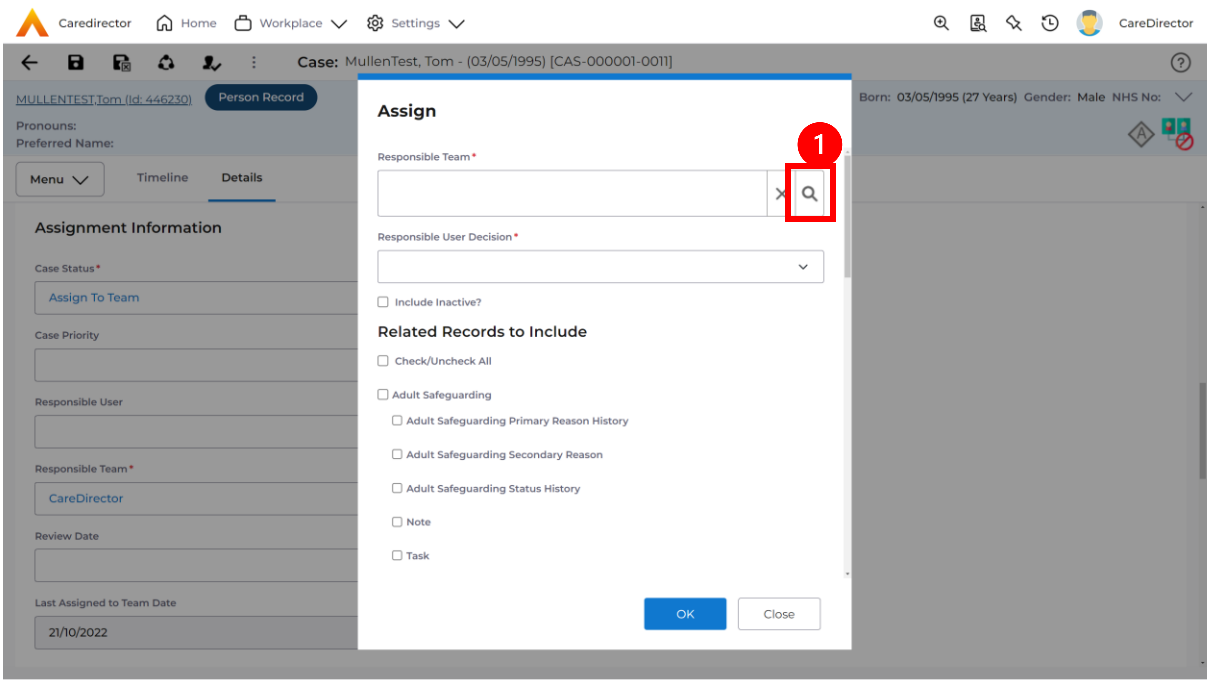
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save.**



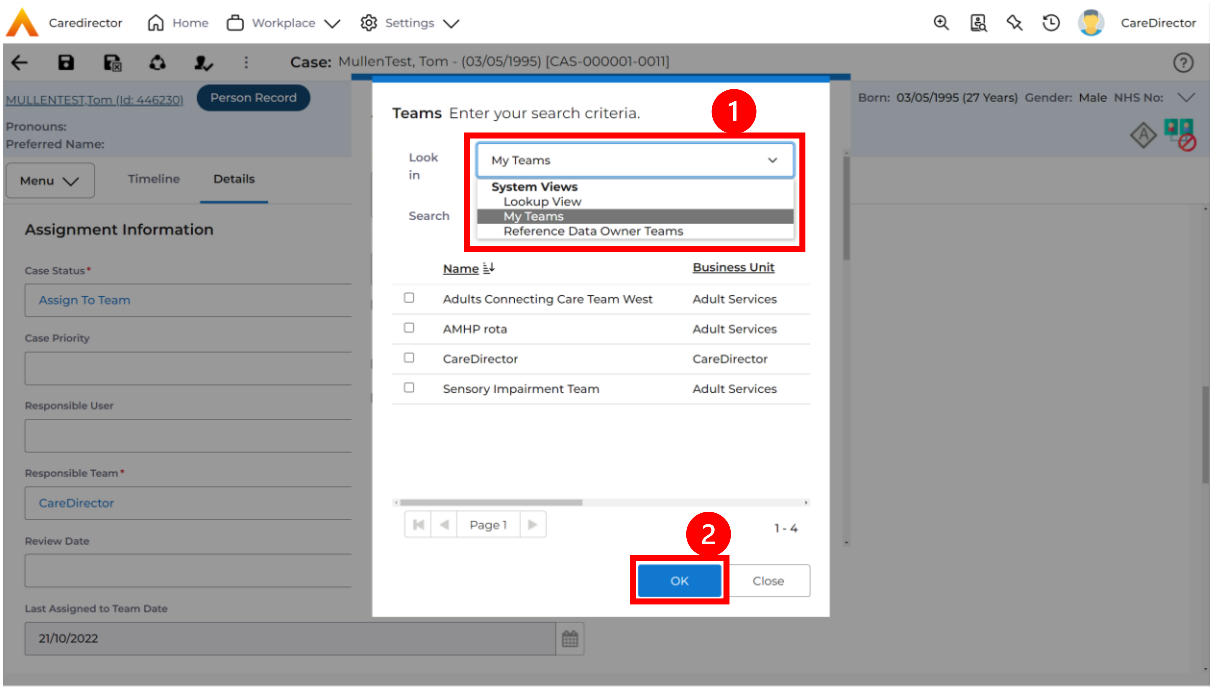
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.



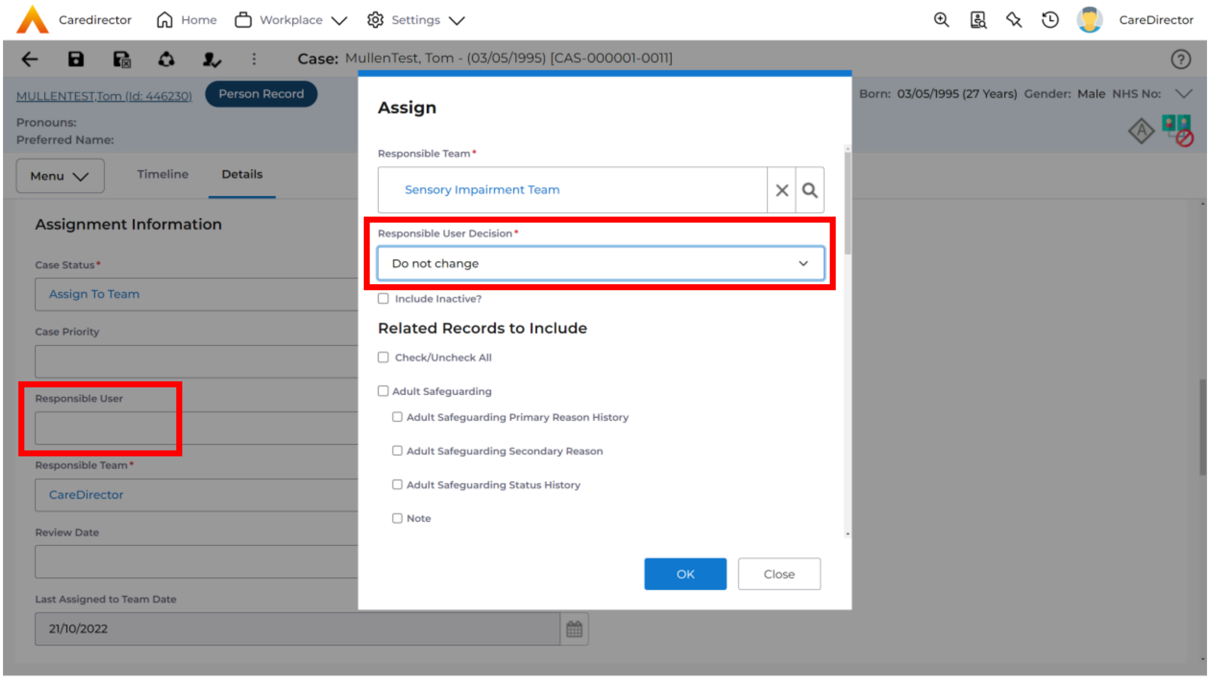
5. This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup function.**



6. 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.**



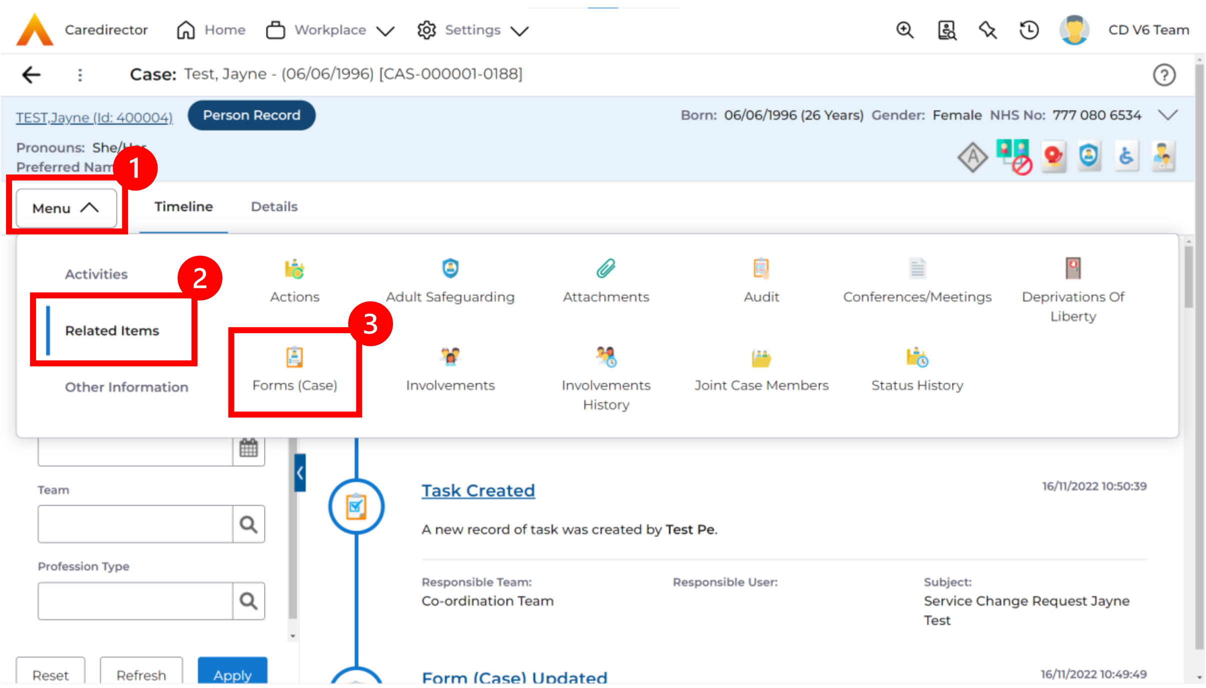
7. The next section is going to ask what you want to do about the **Responsible User**. Due to the **Responsible User Workflow** being triggered, removing the current **Responsible User** from the field. We can leave this as **Do Not Change** however, if it has not removed it (you can check by looking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



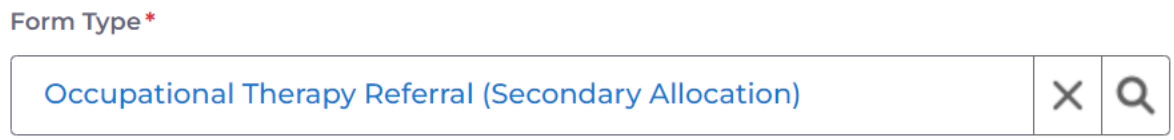
8. When finished, select **OK.** It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

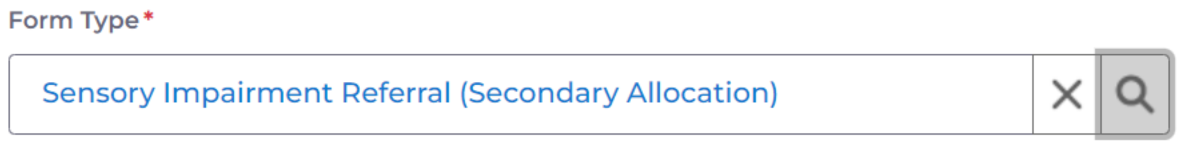
COT & SI Secondary Allocation Process

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

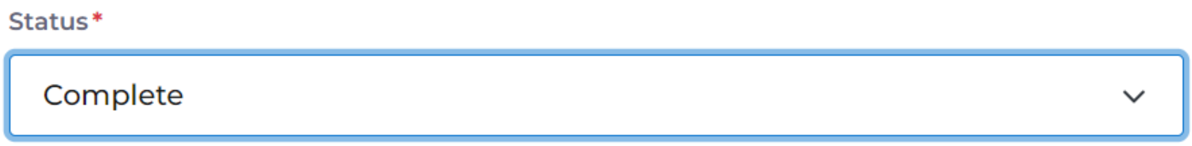


2. Select the relevant form, either **Occupational Therapy Referral (Secondary Allocation)** or **Sensory Impairment (Secondary Allocation)** form.



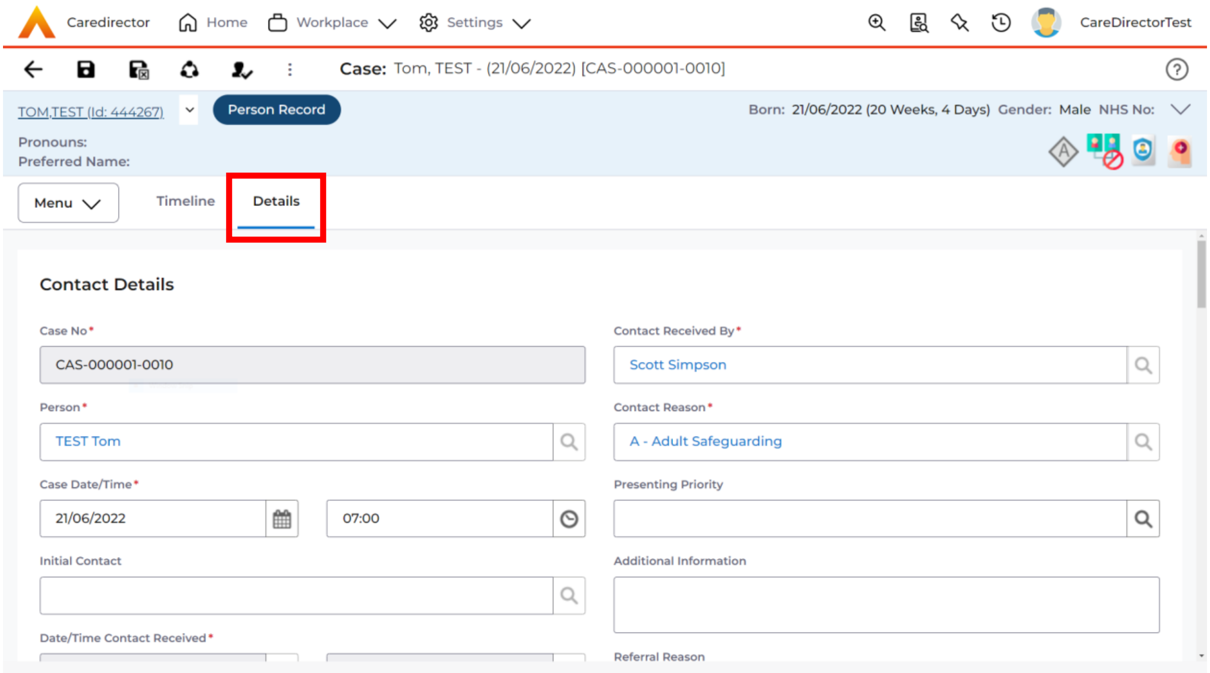


3. When this **Form** has been **Completed** a **Workflow** which creates the **Secondary Case** and generates a **Task** to the relevant team.

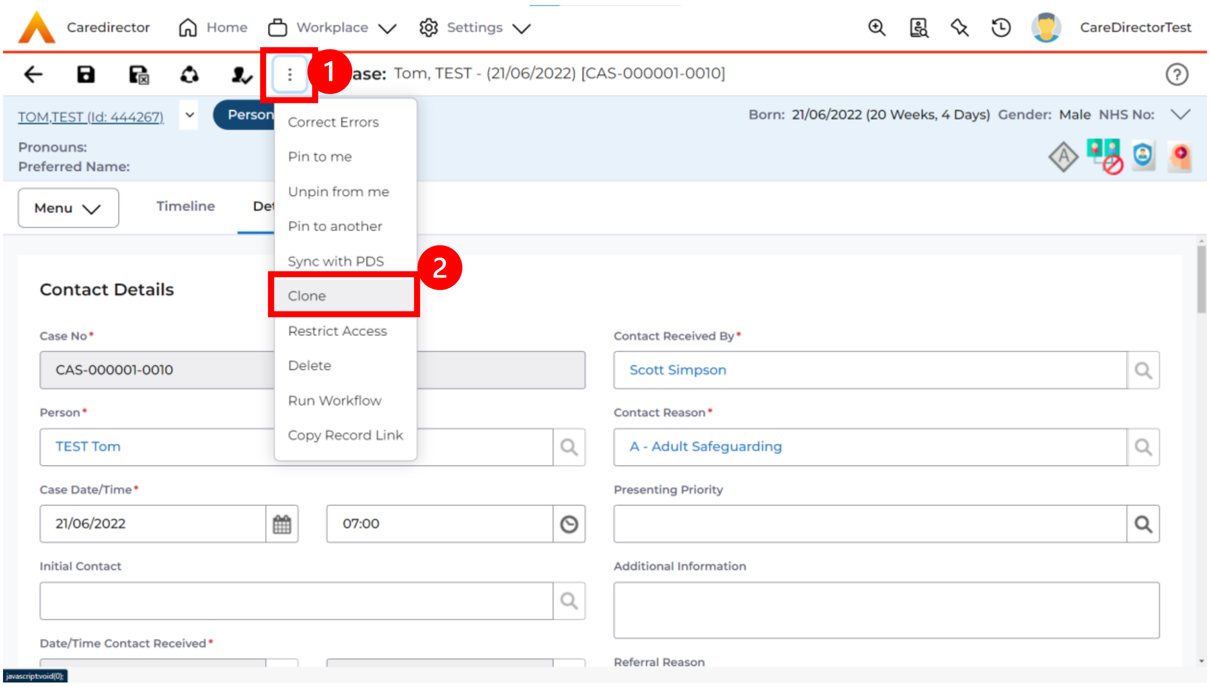


How to clone a Case

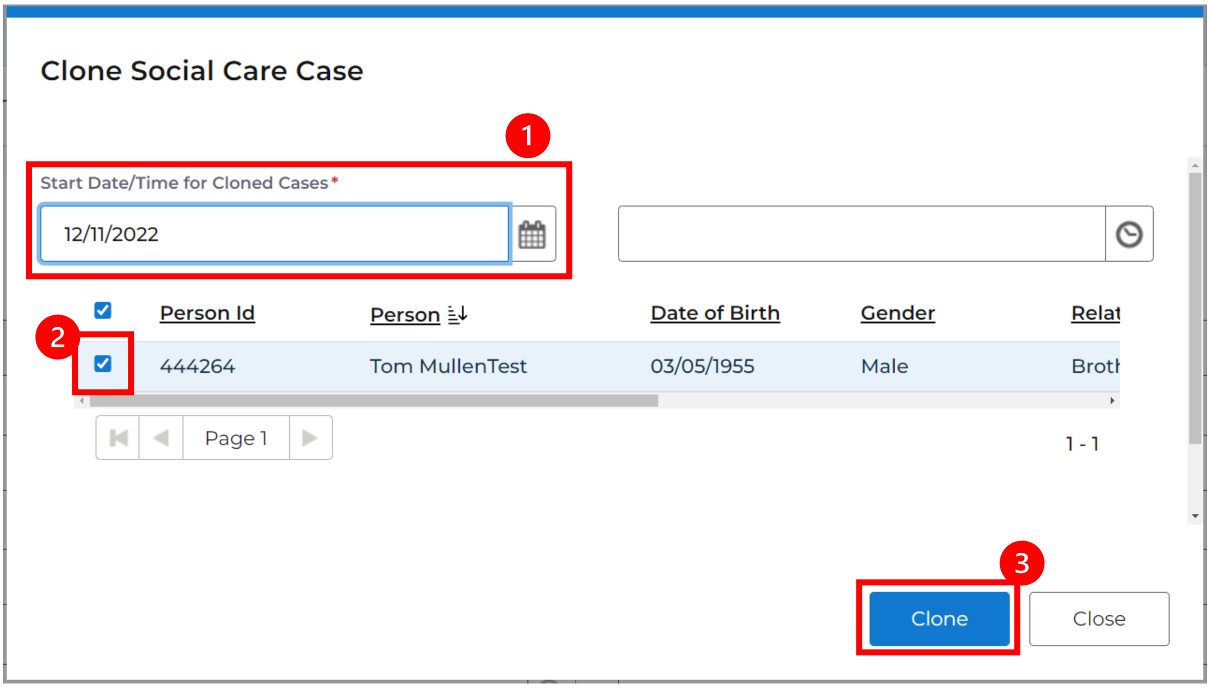
1. Locate the **Case** you want to **Clone**. Select **Details** tab.



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

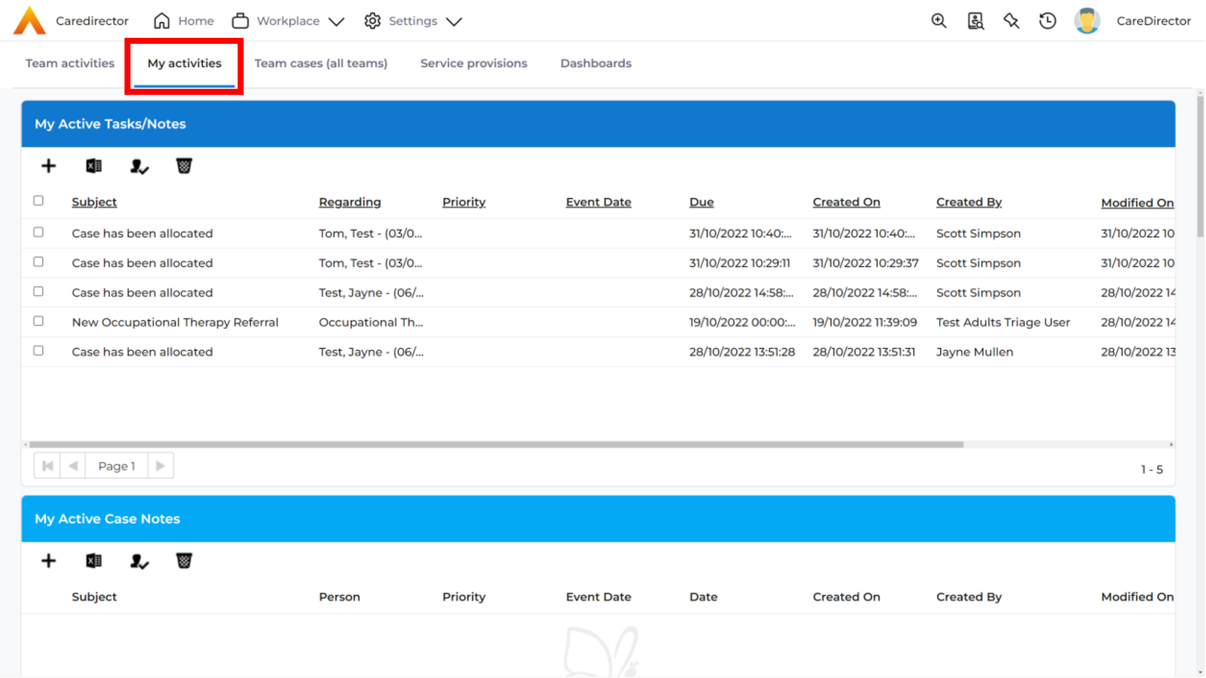


3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone.**

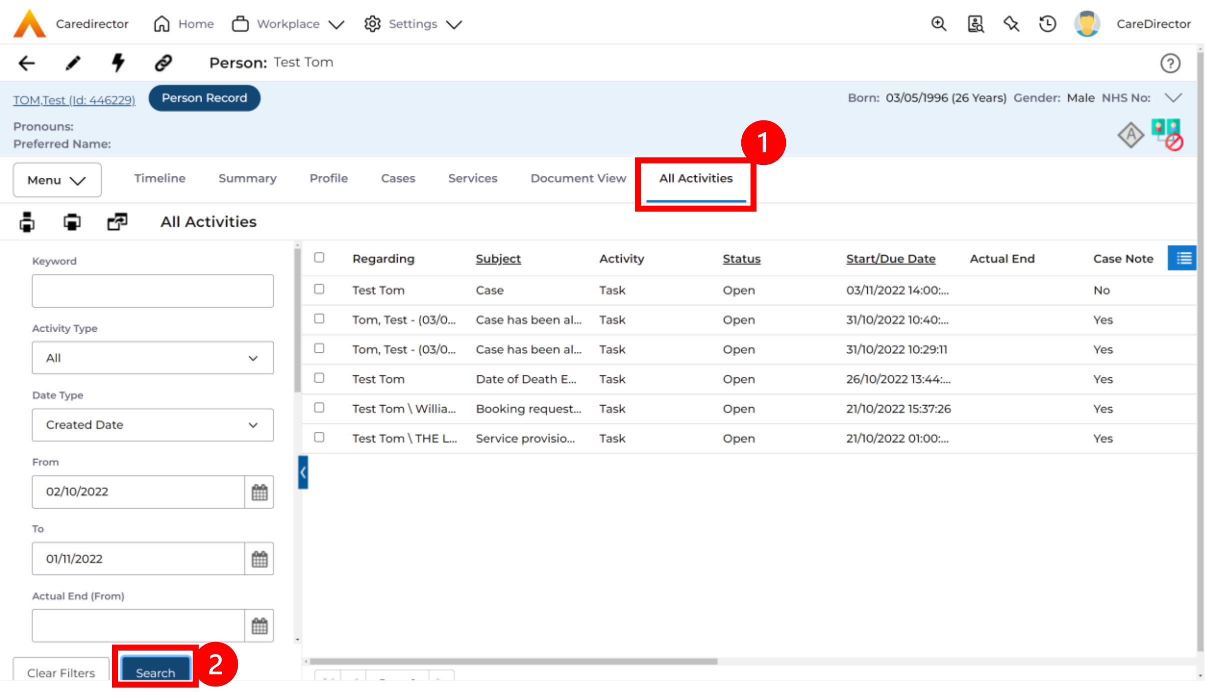


How to find Activities

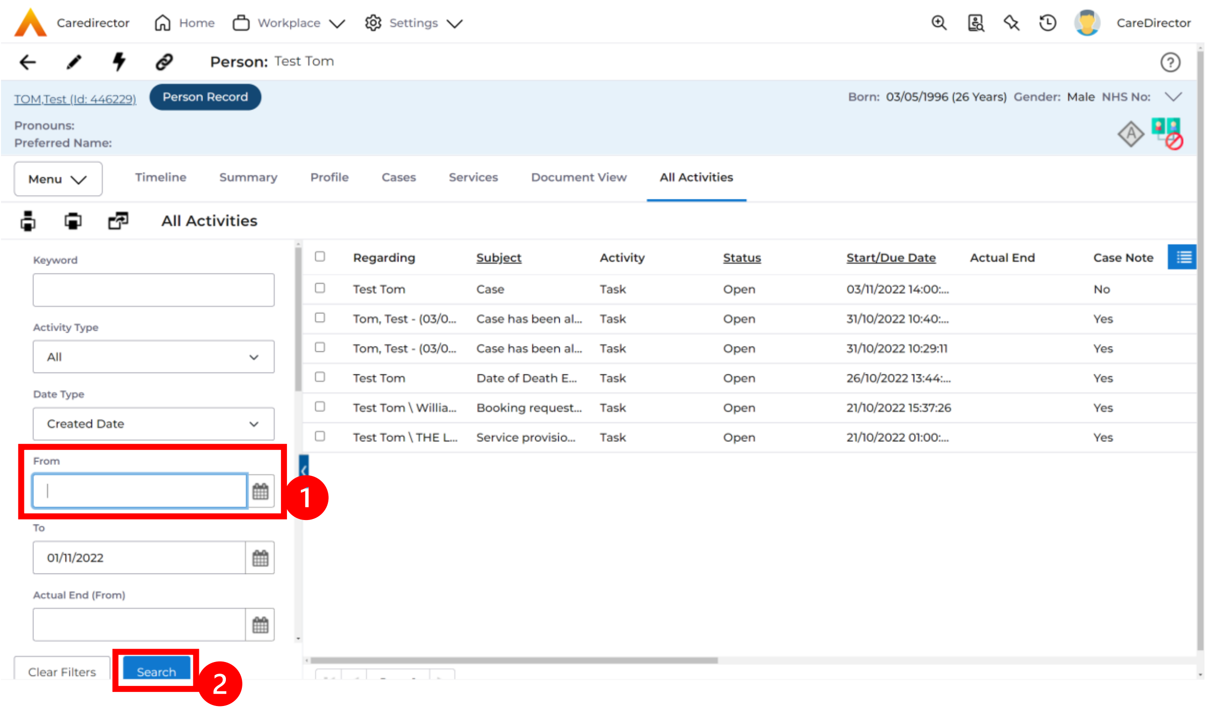
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



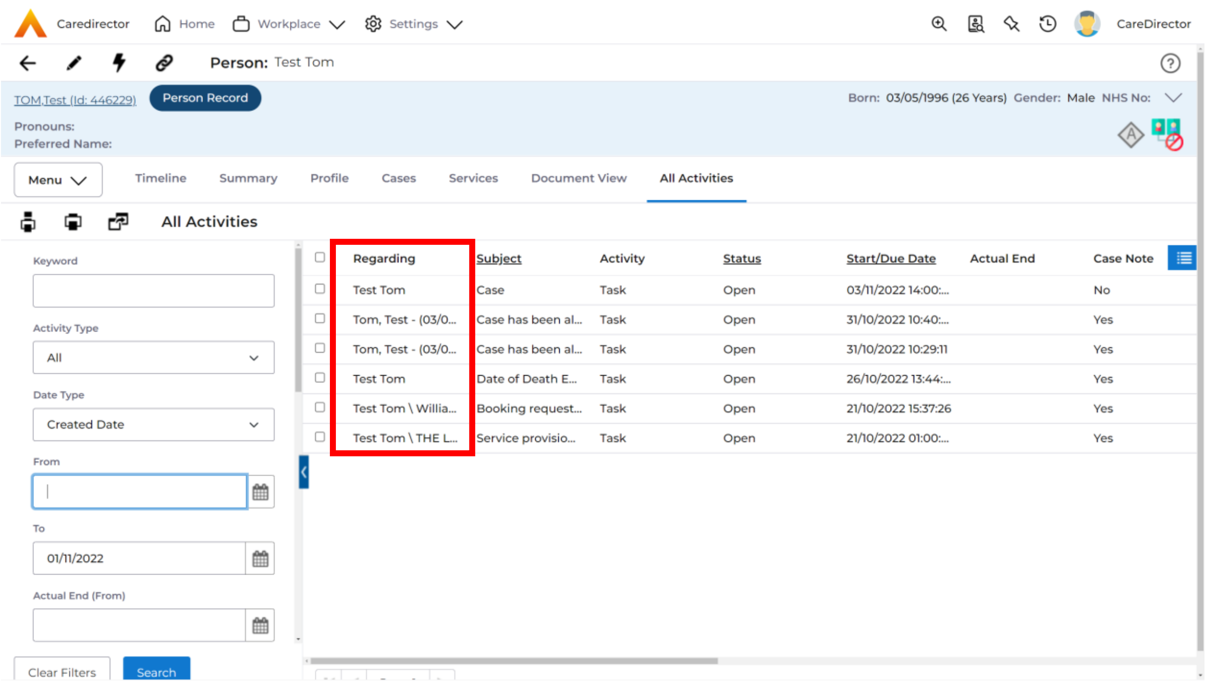
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



3. 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.

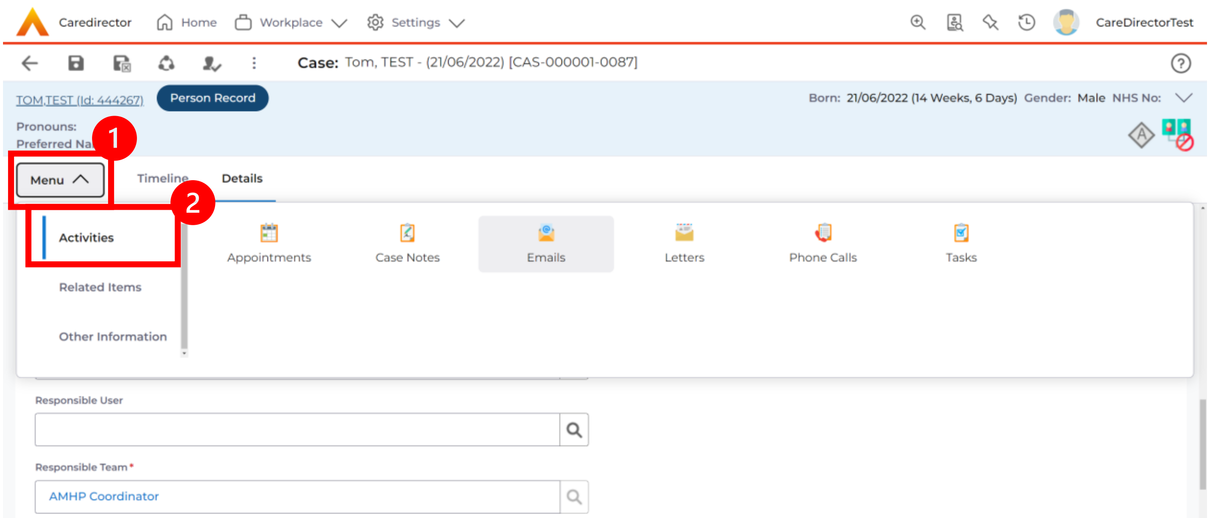


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

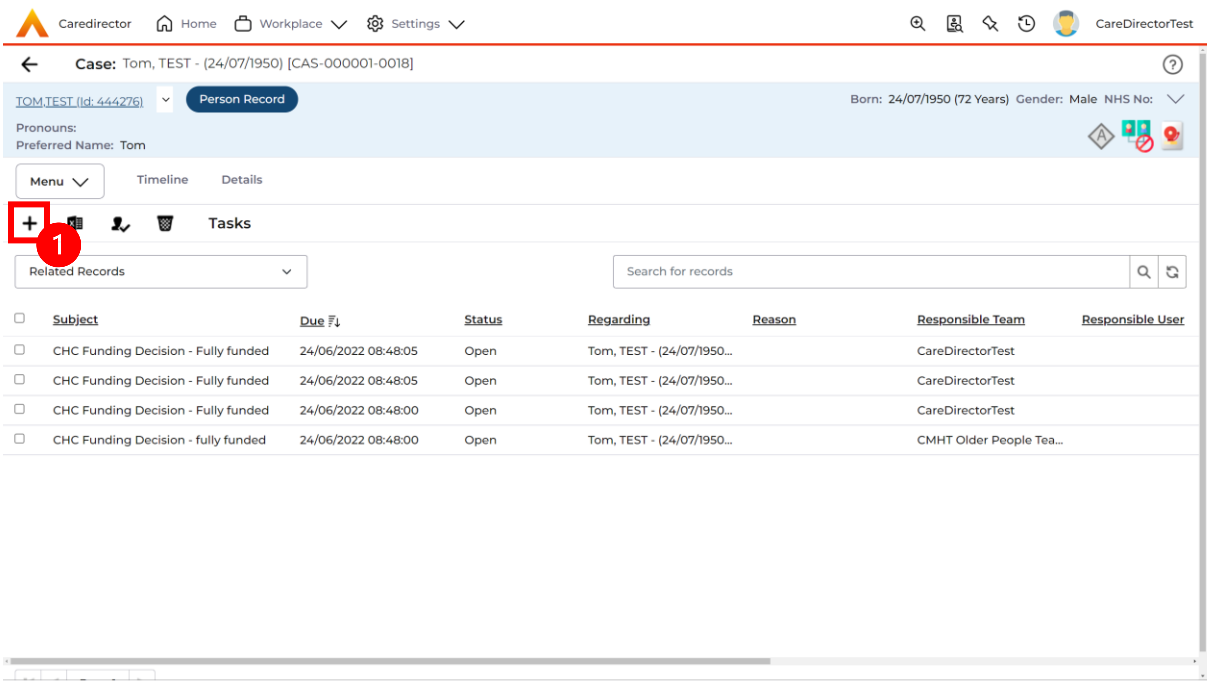


How to input an Activity

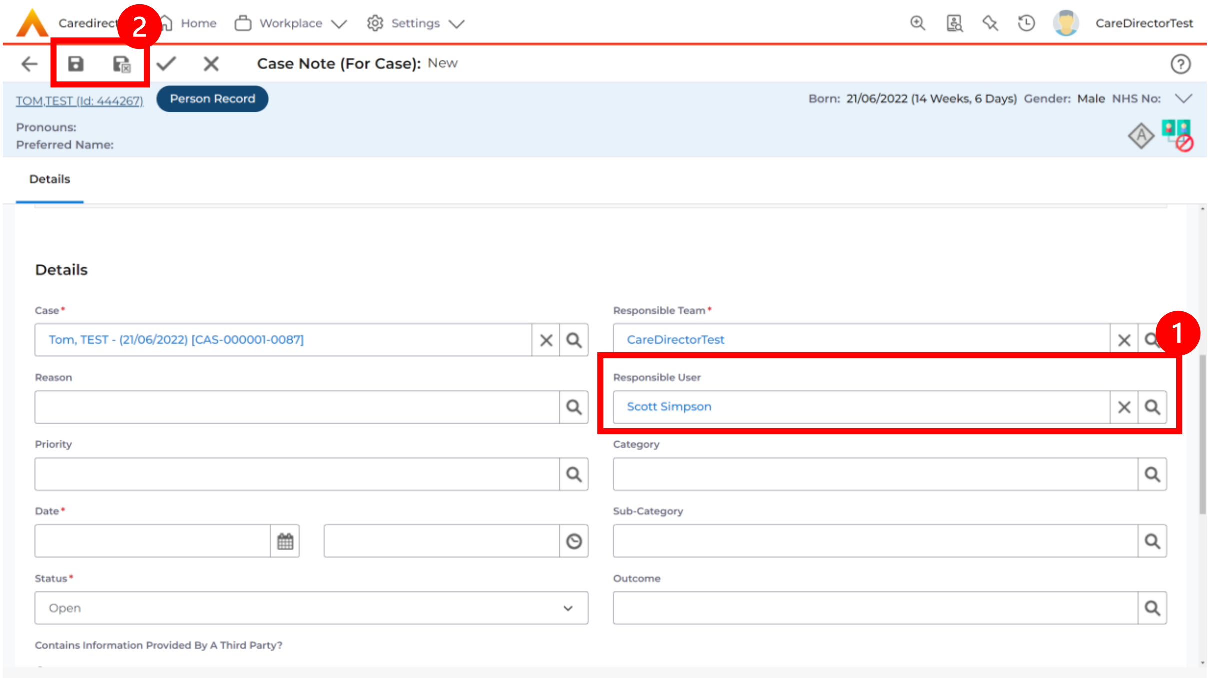
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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



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**.

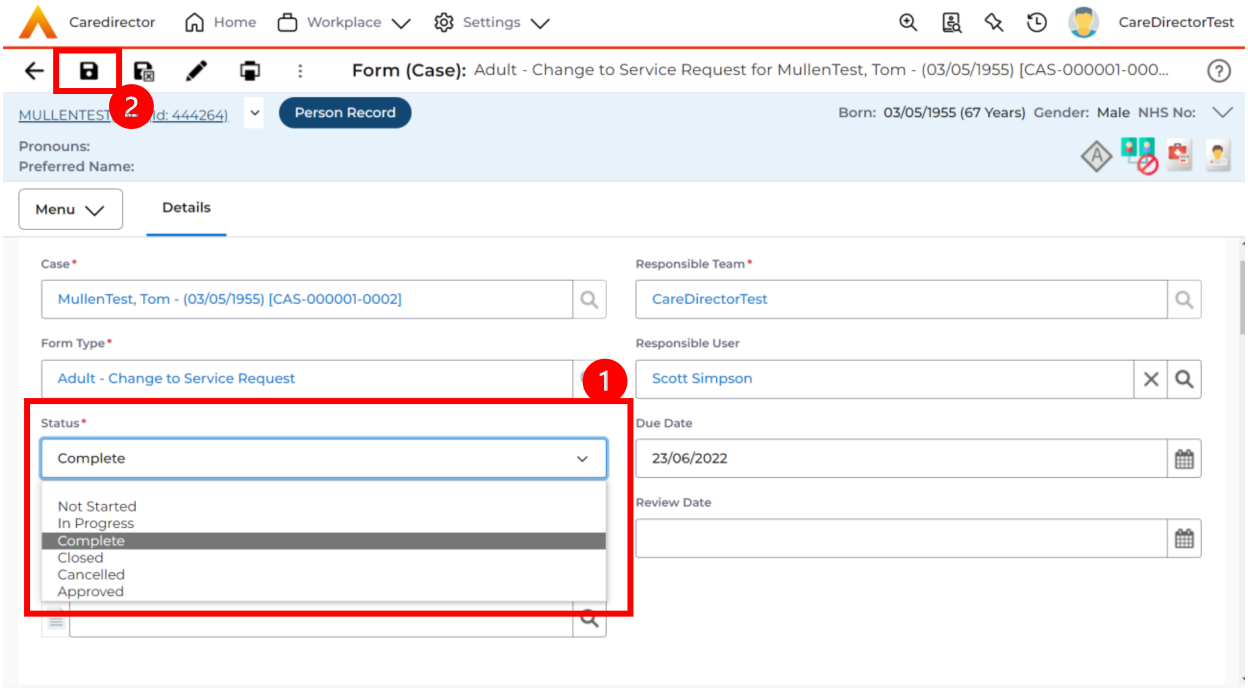


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

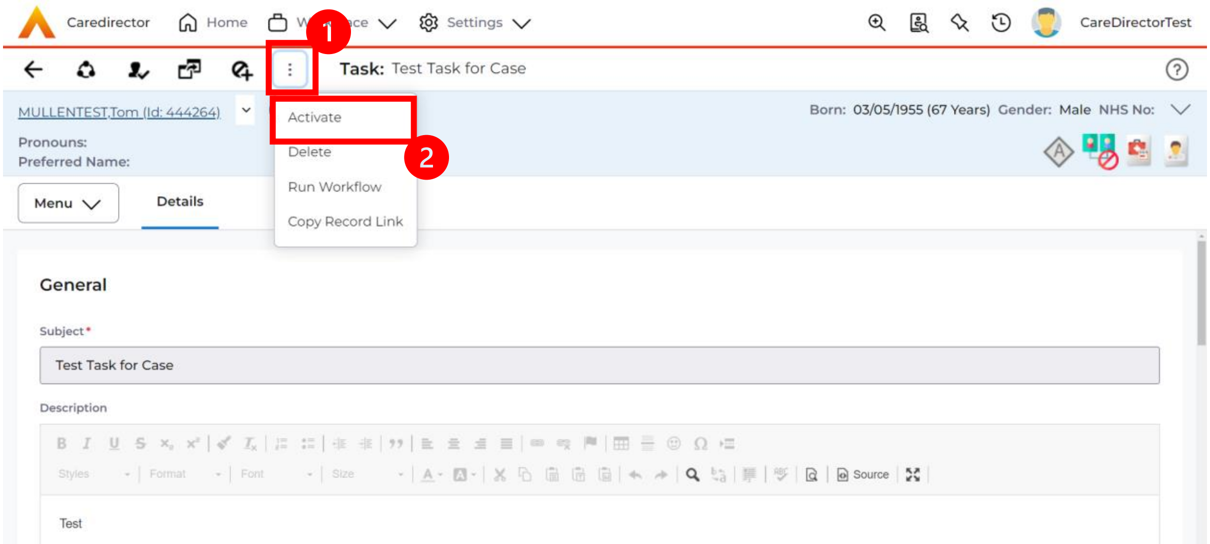
How to change status to Complete (Re-activate Activities)

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.**

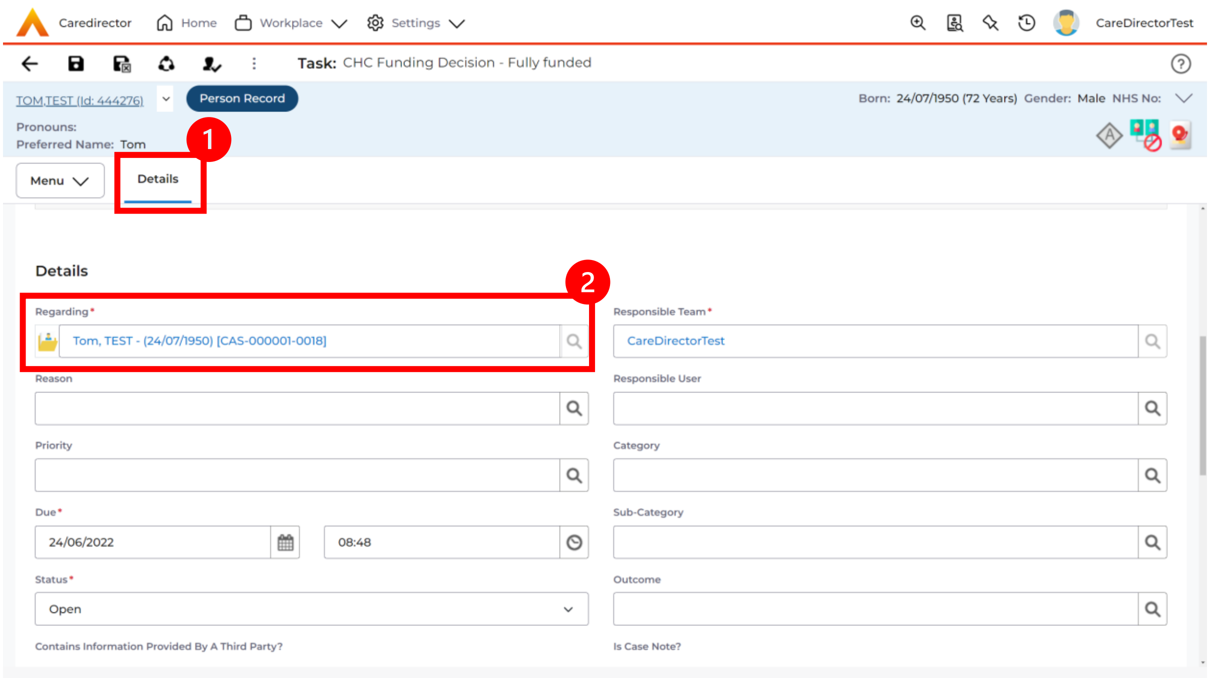


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

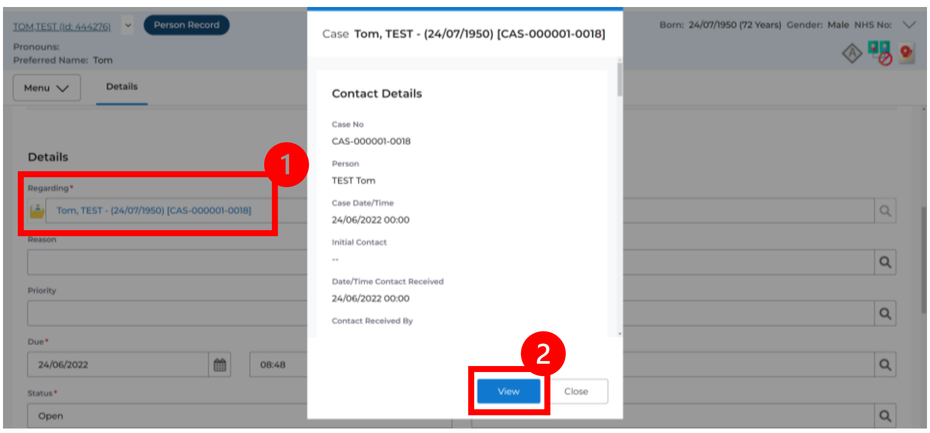
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.

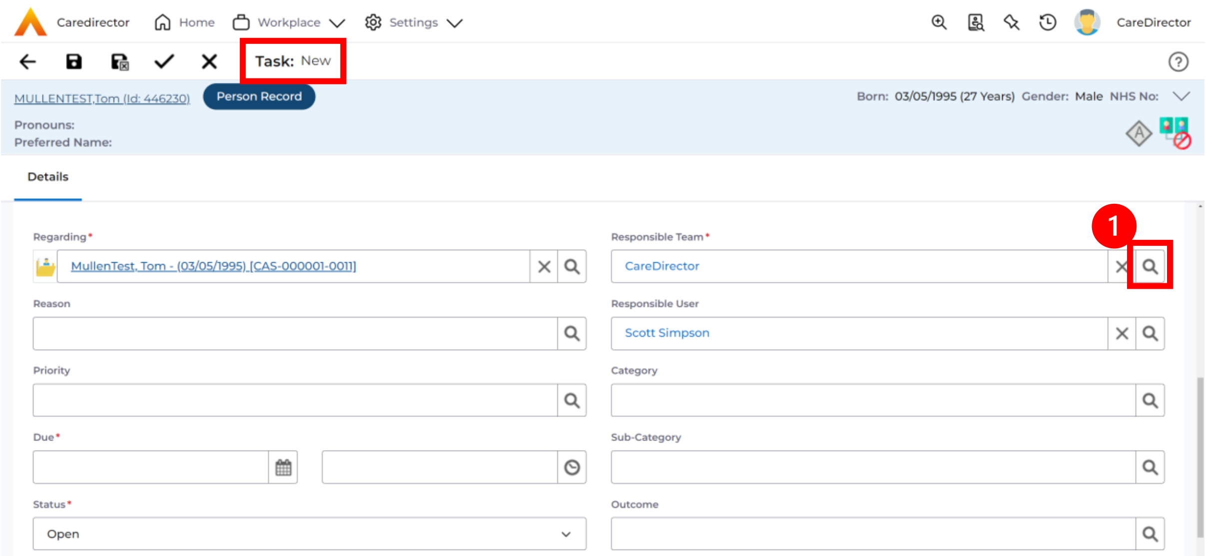
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

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.**

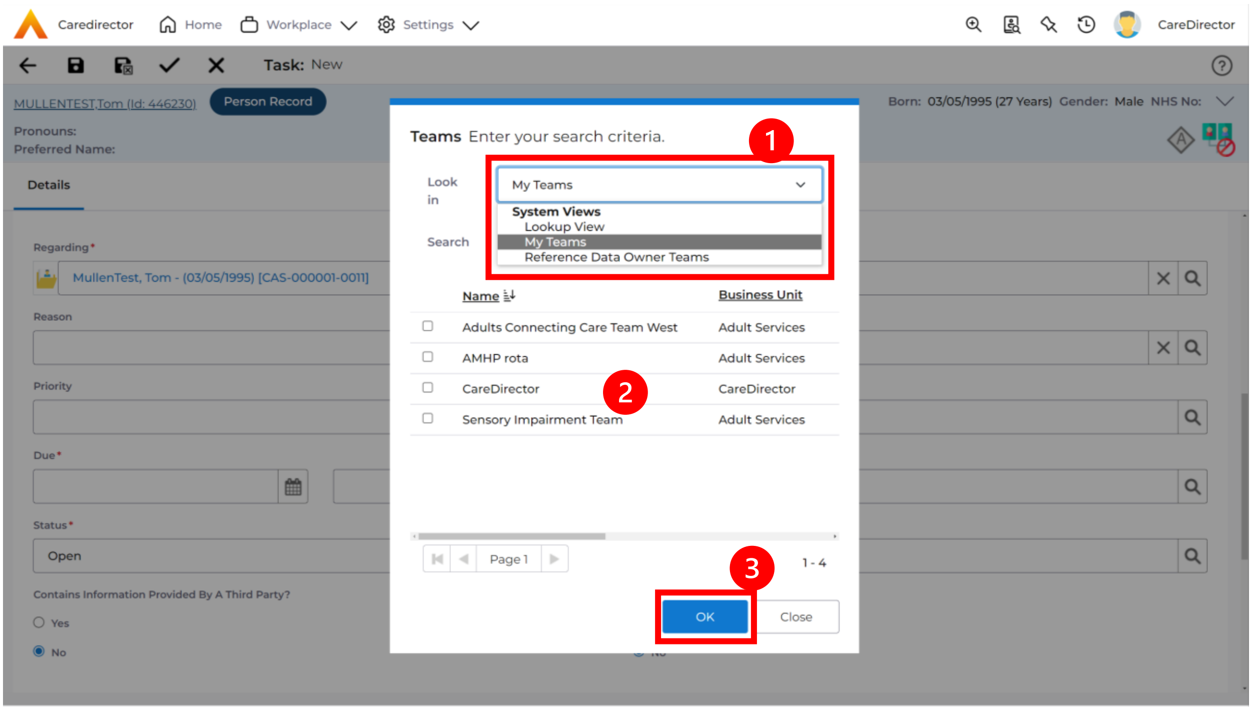


How to Allocate a new Activity to another team

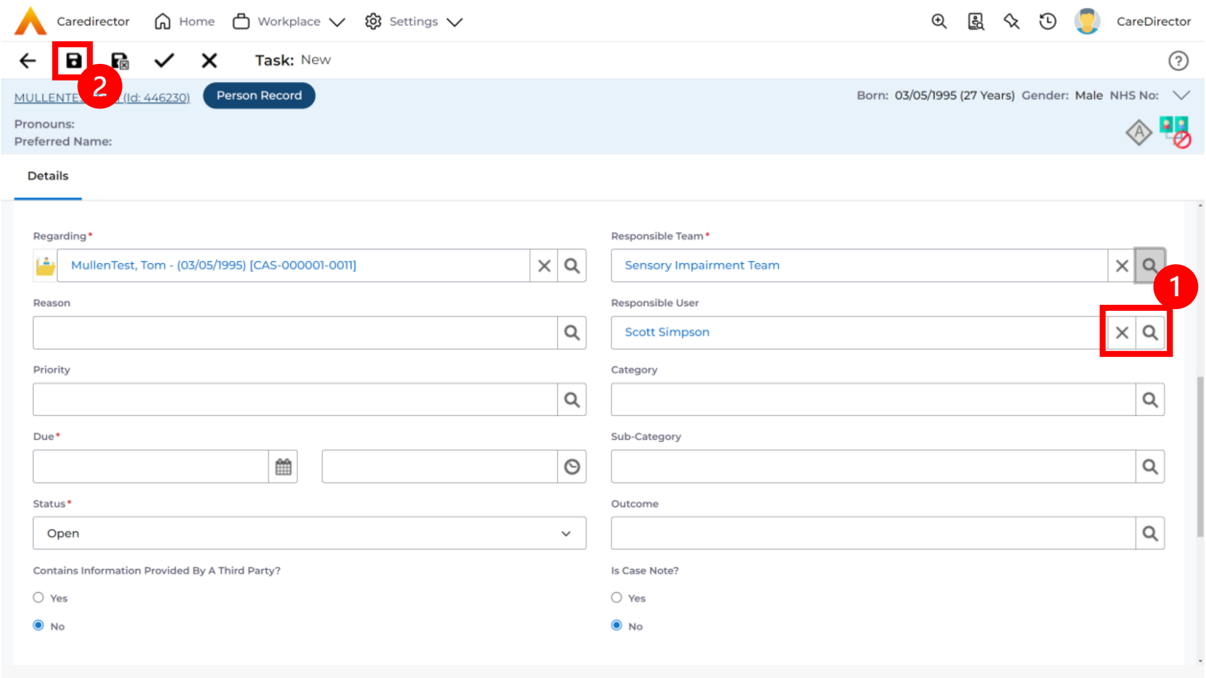
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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.**

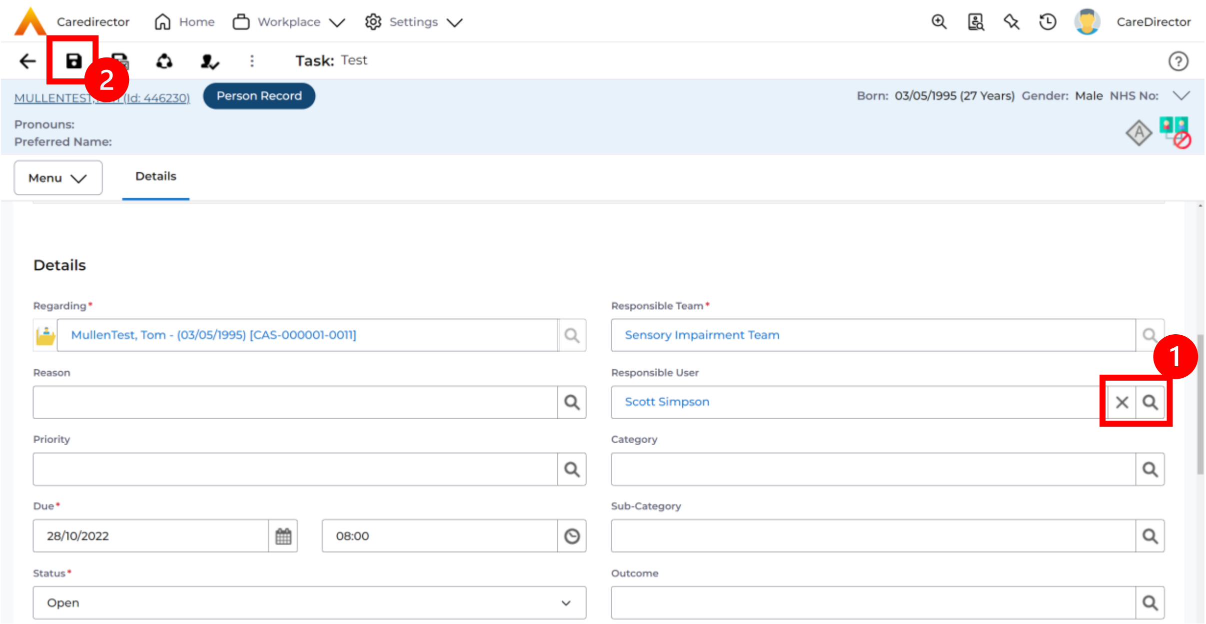


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

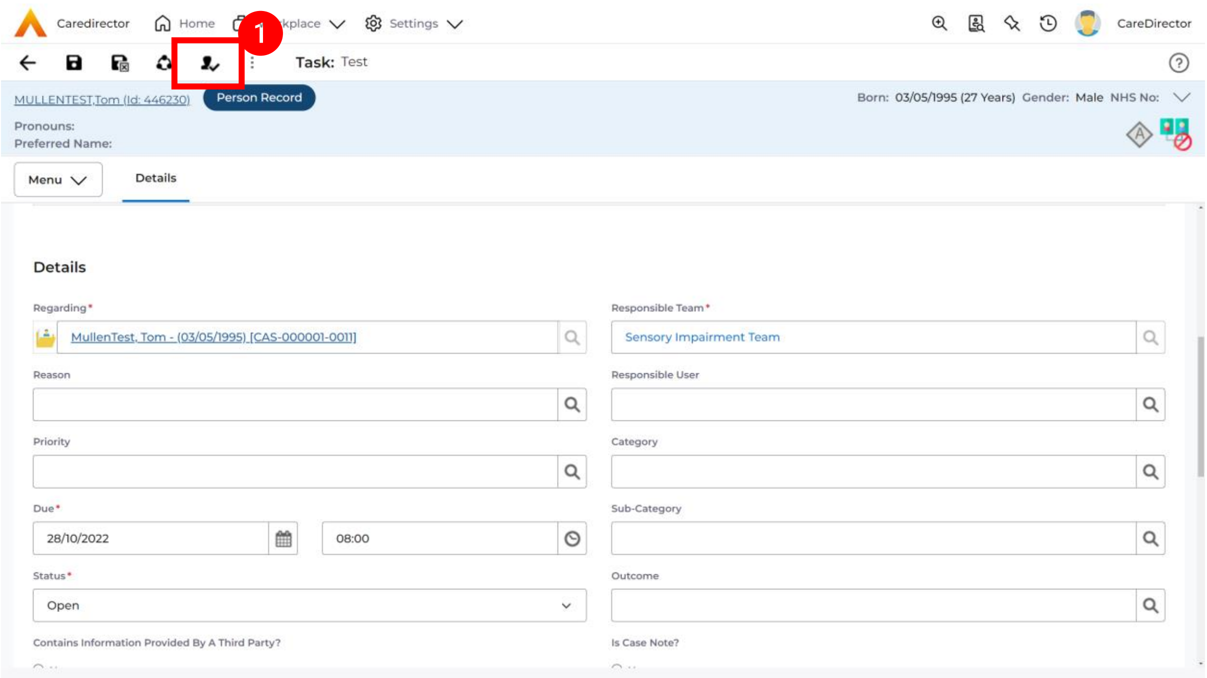


How to Allocate an existing Activity to another team

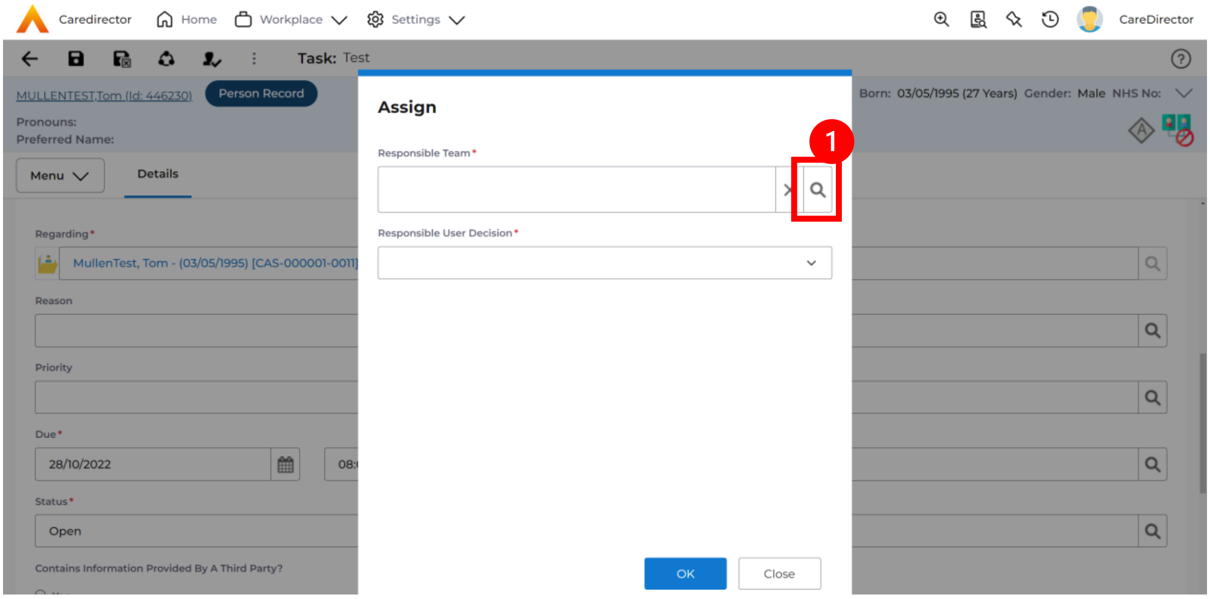
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



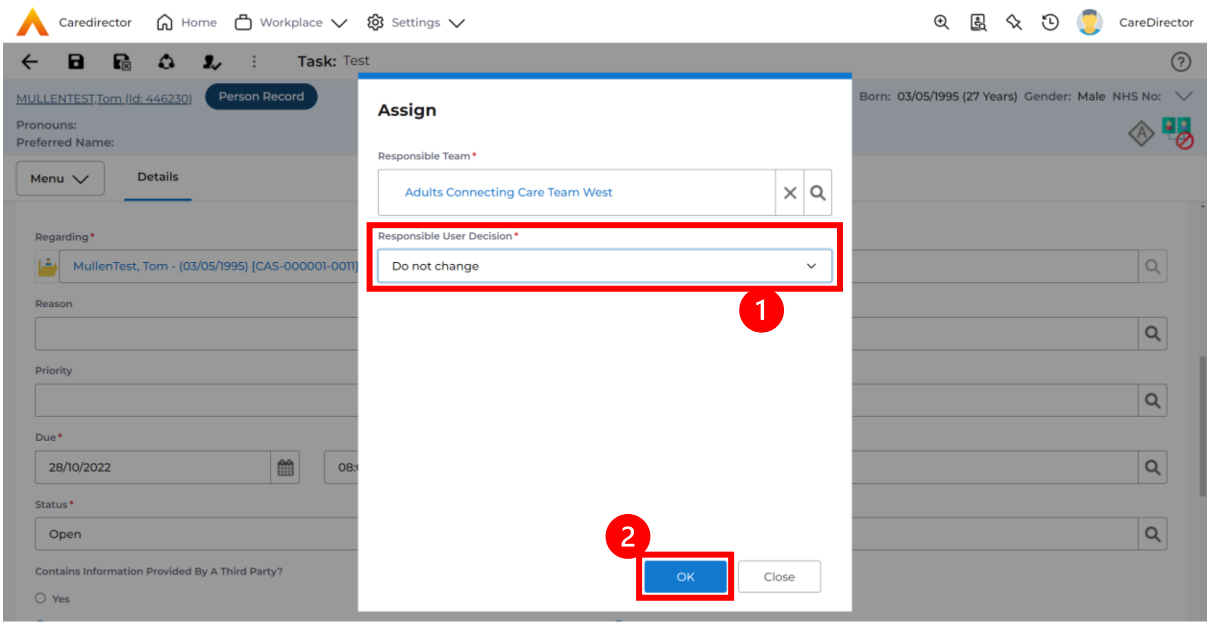
2. Next select **Assign this record to another team** from the toolbar.



3. 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.



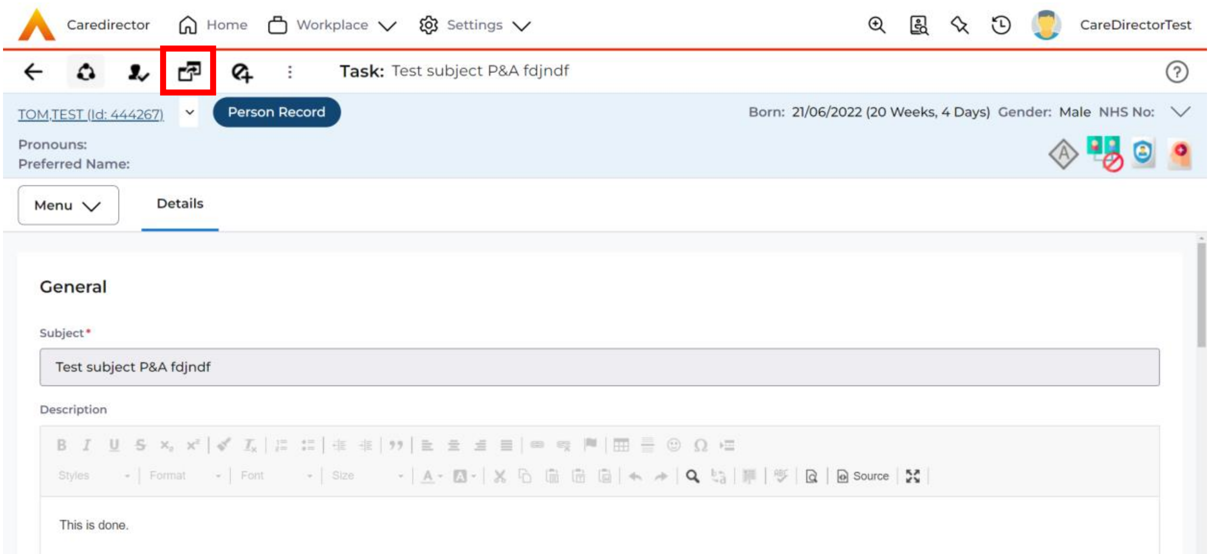
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



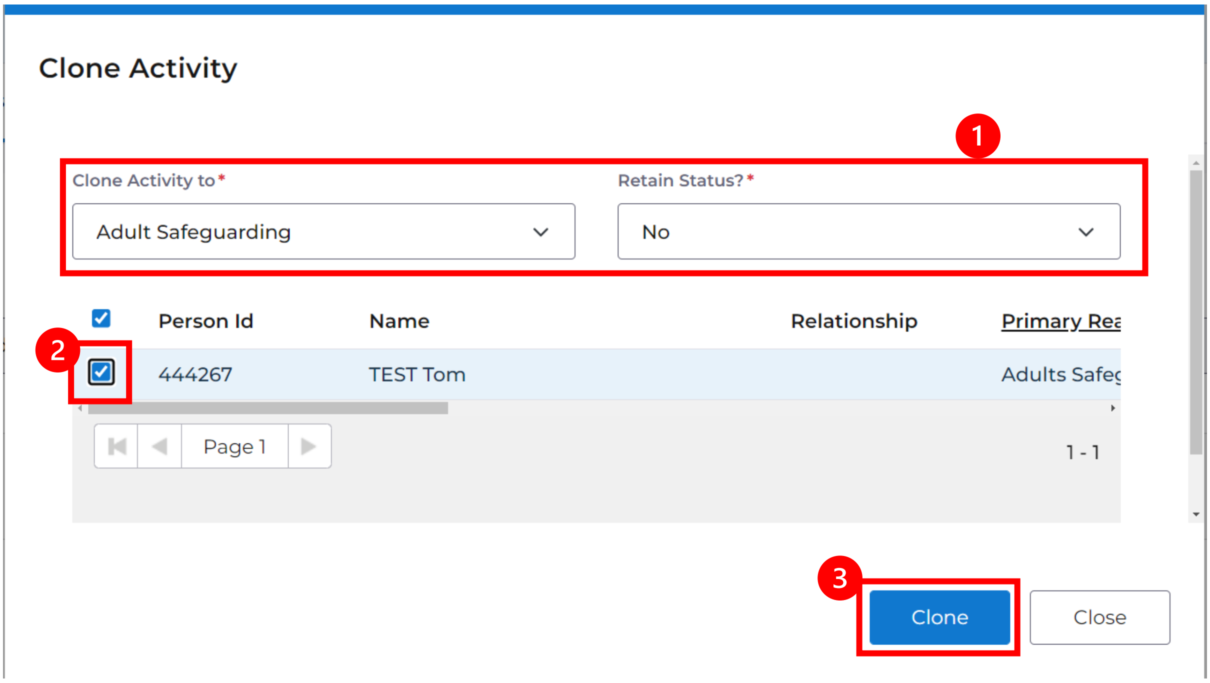
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

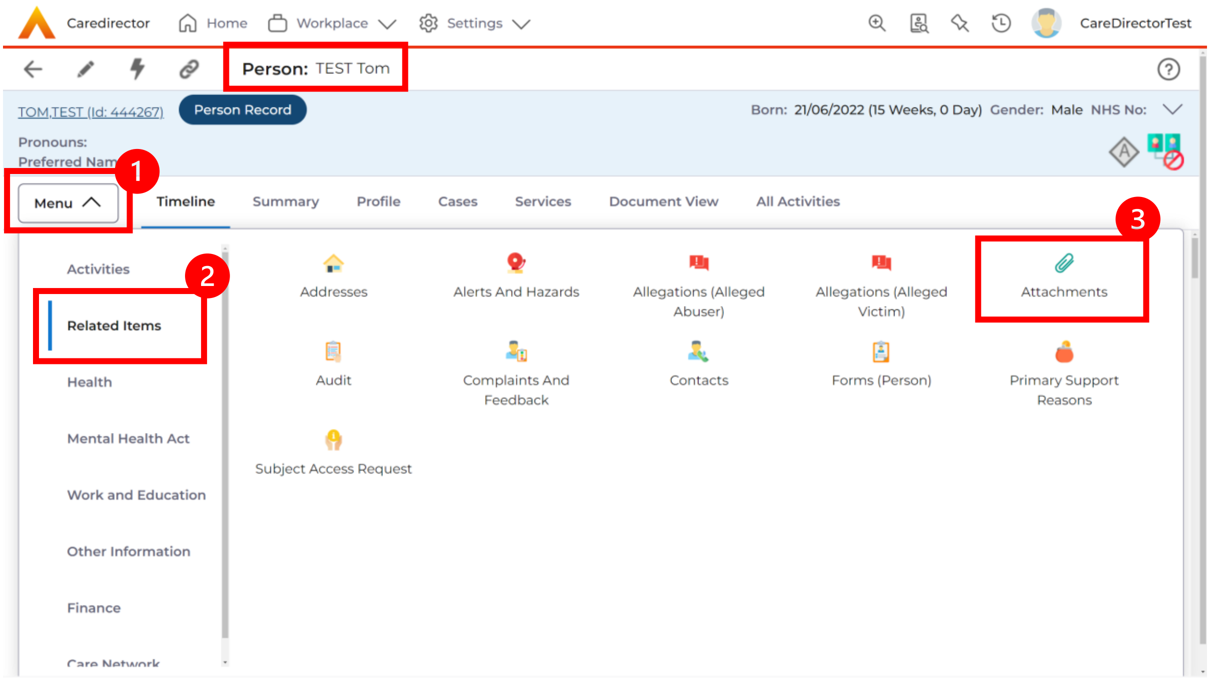


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

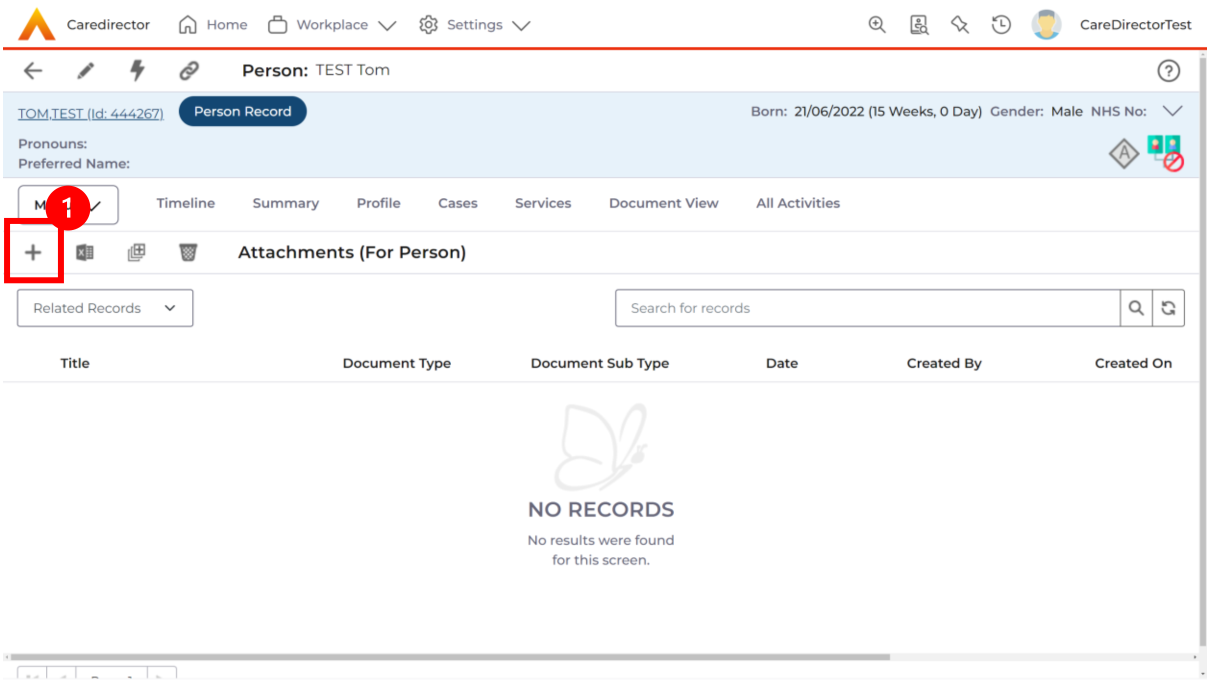


How to upload Attachments

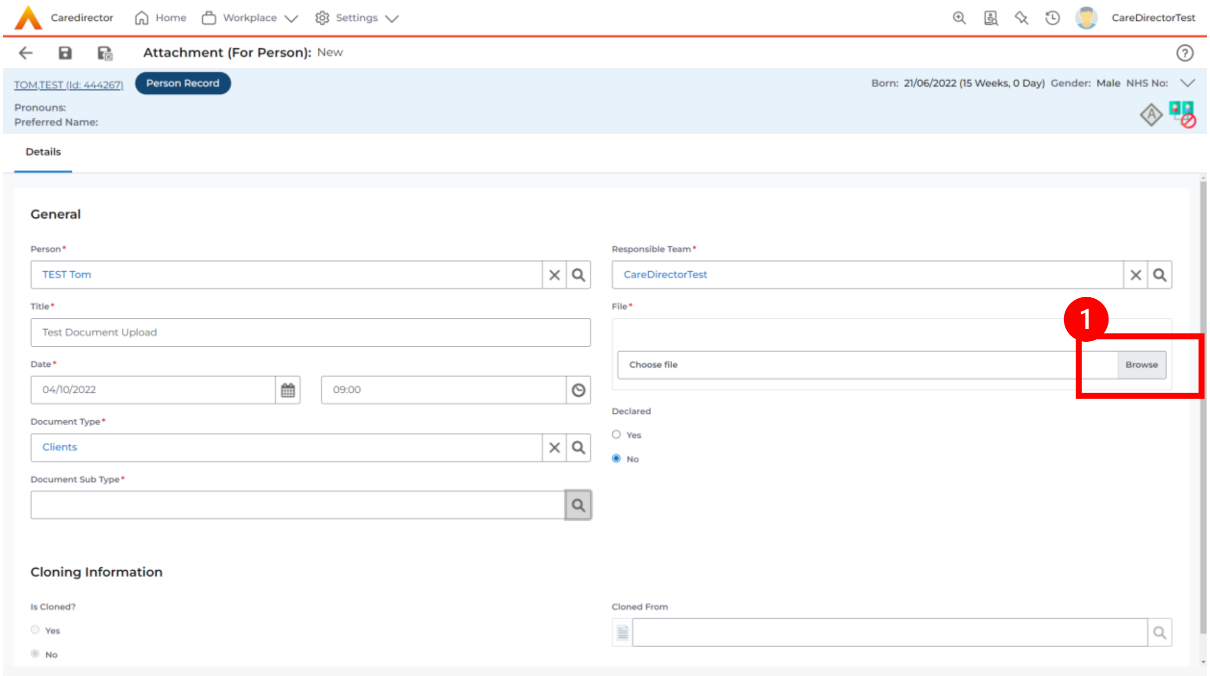
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



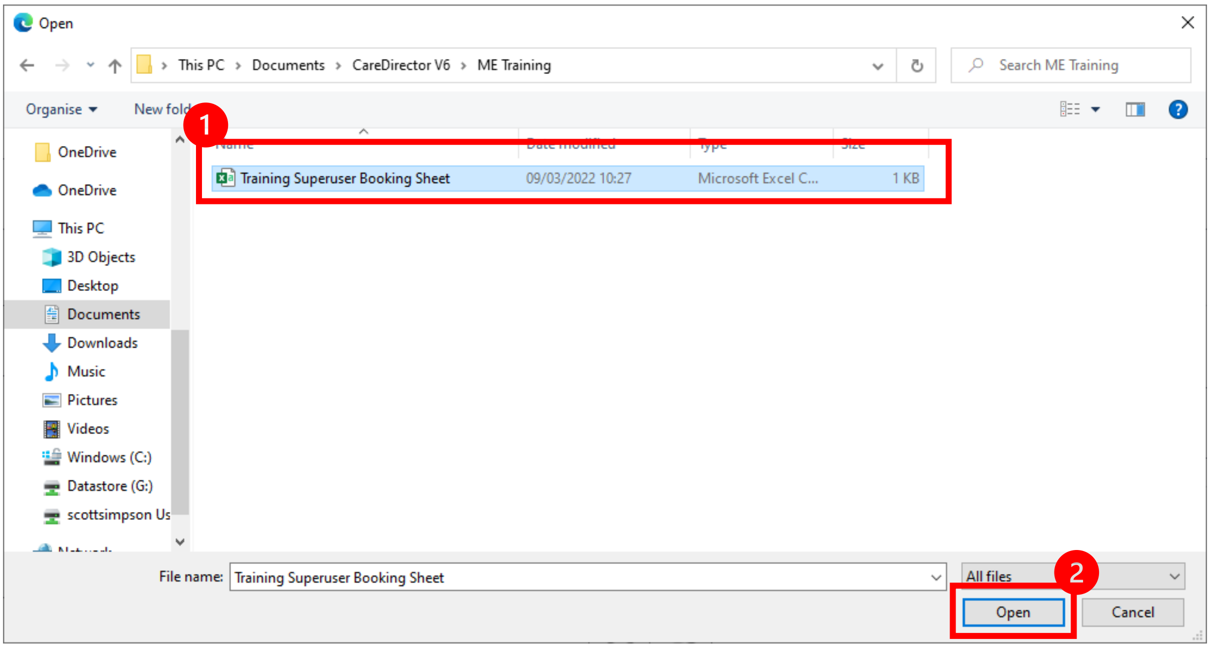
2. When opened, select the **Create New Record** from the toolbar.



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



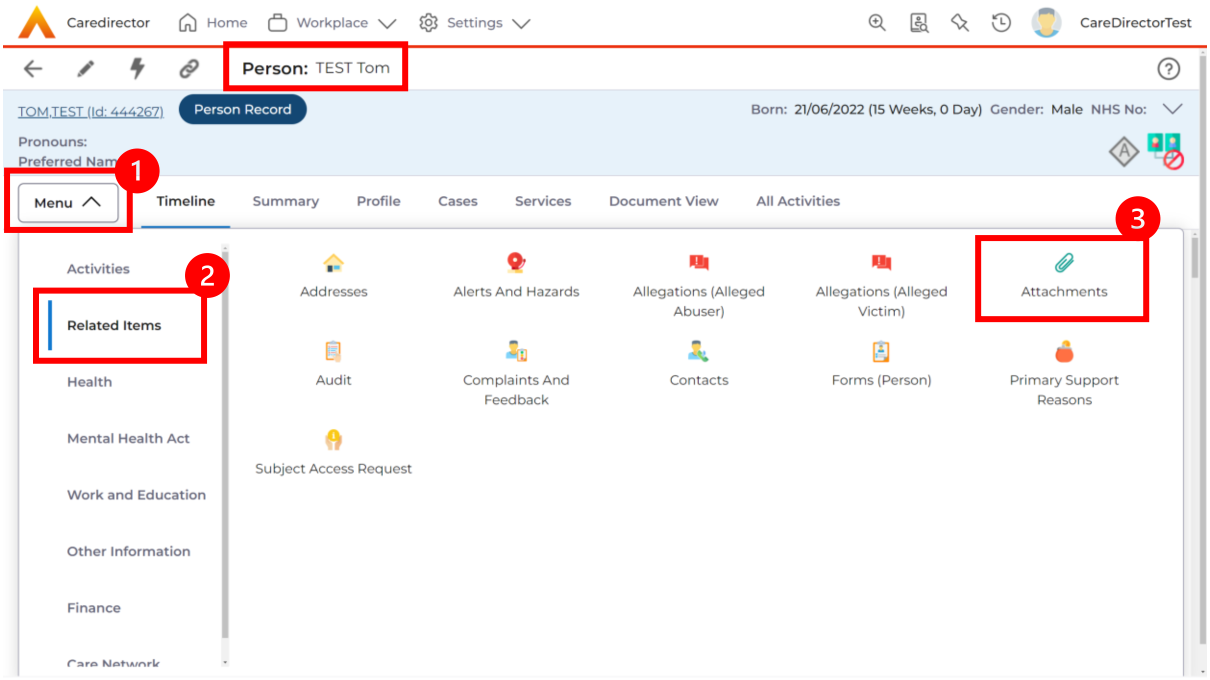
4. Select a **File** from your computer/ SharePoint and select **Open.**



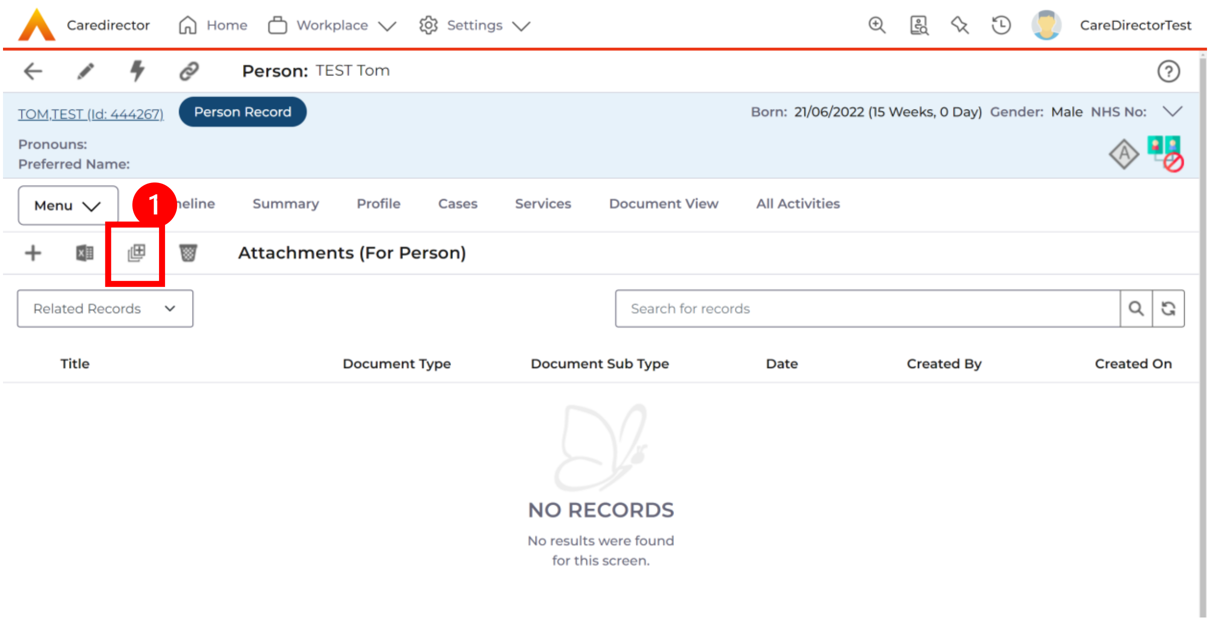
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

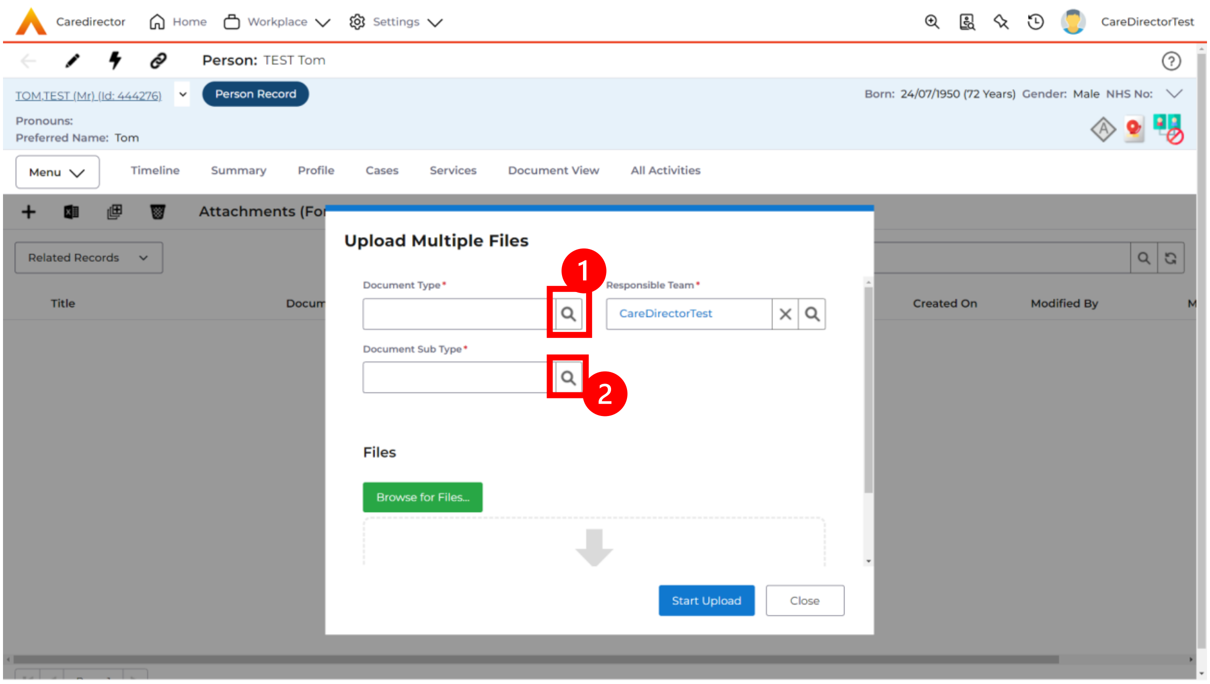
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



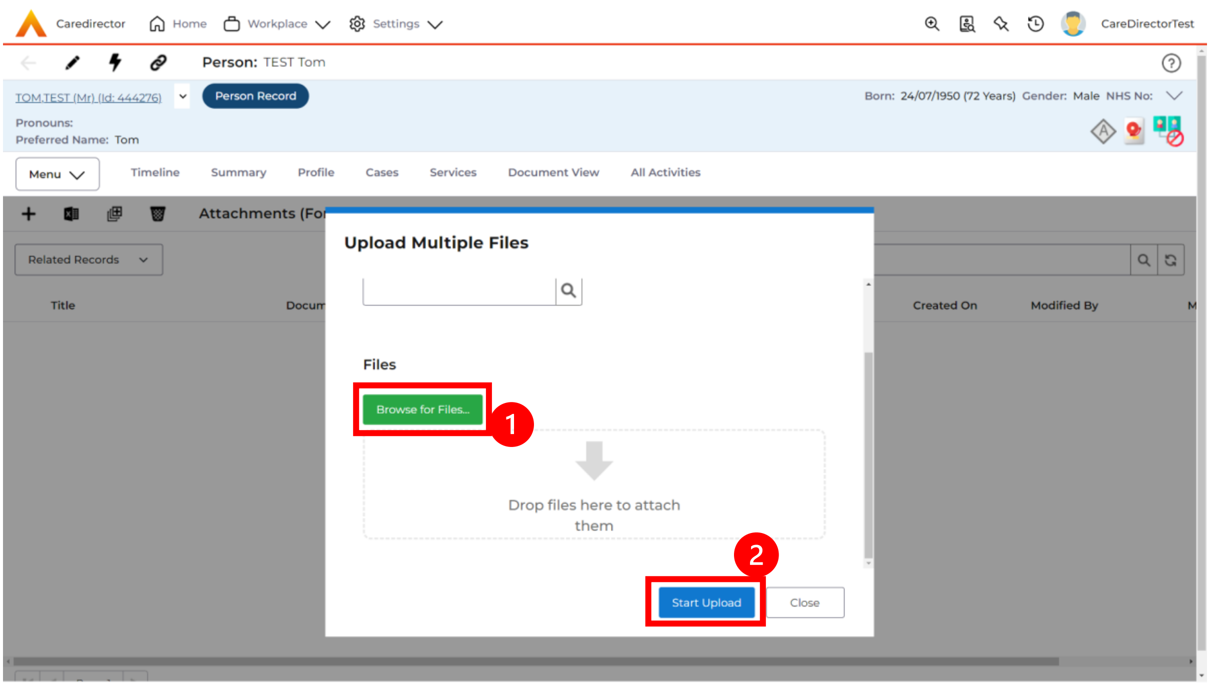
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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



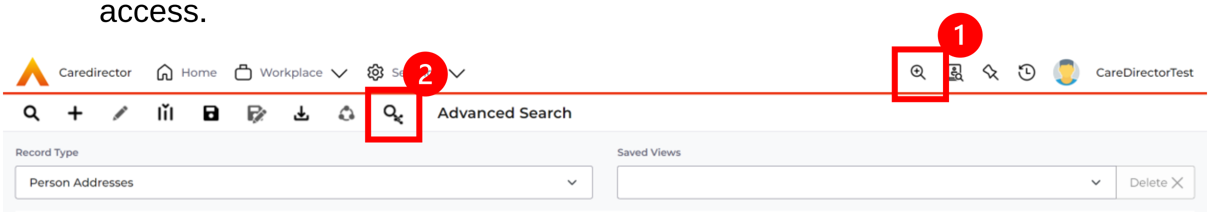
4. If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When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

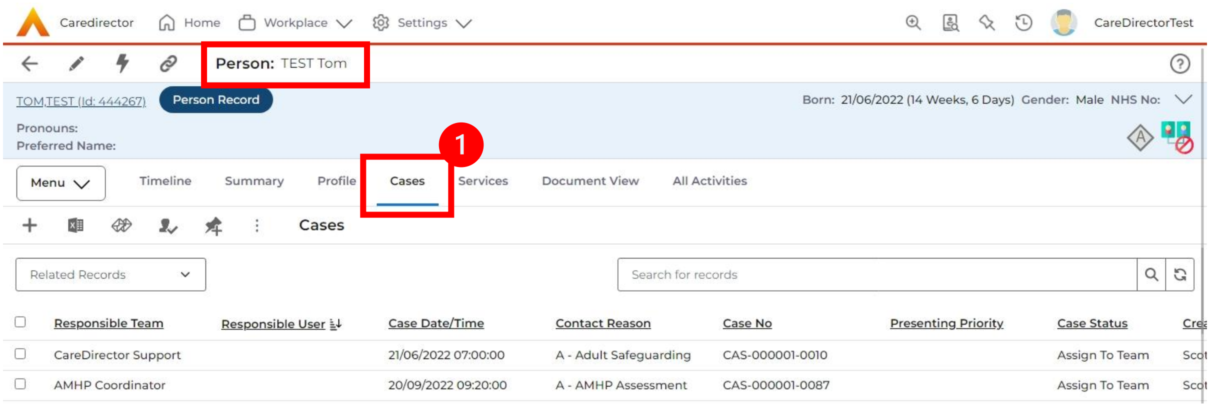
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.



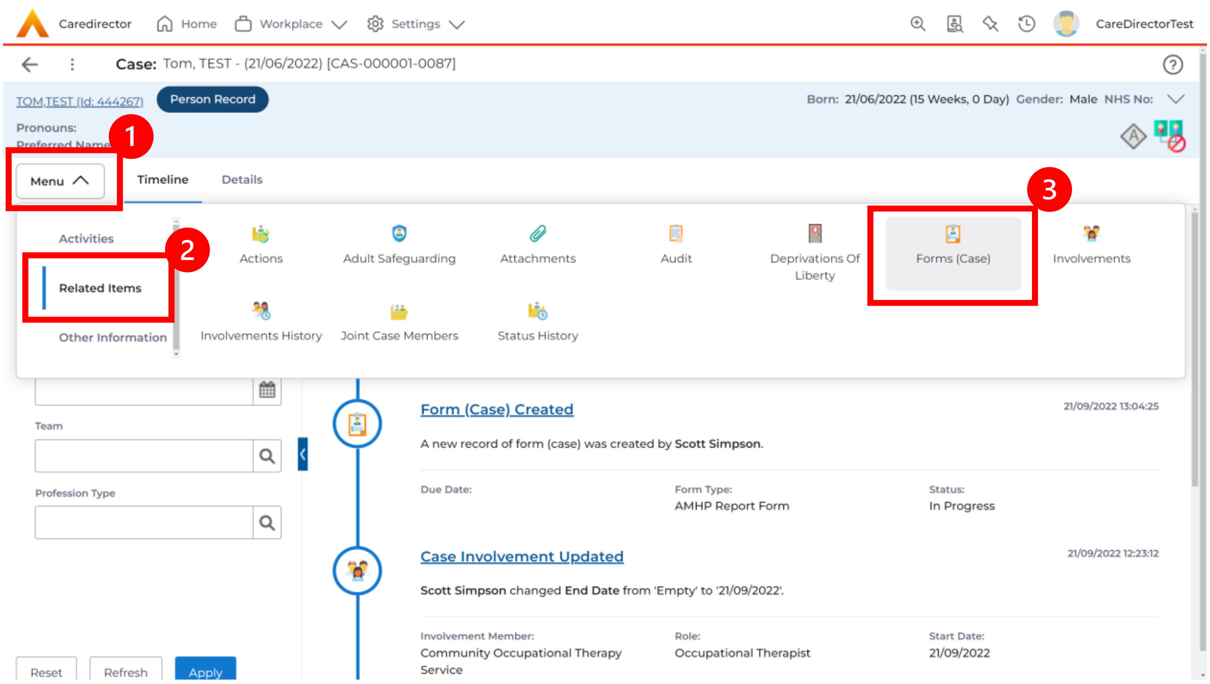
3. Select from the list to automatically search for the pre-built **advanced search.** If nothing is shared with you independently, tell your superuser.

How to add a Form

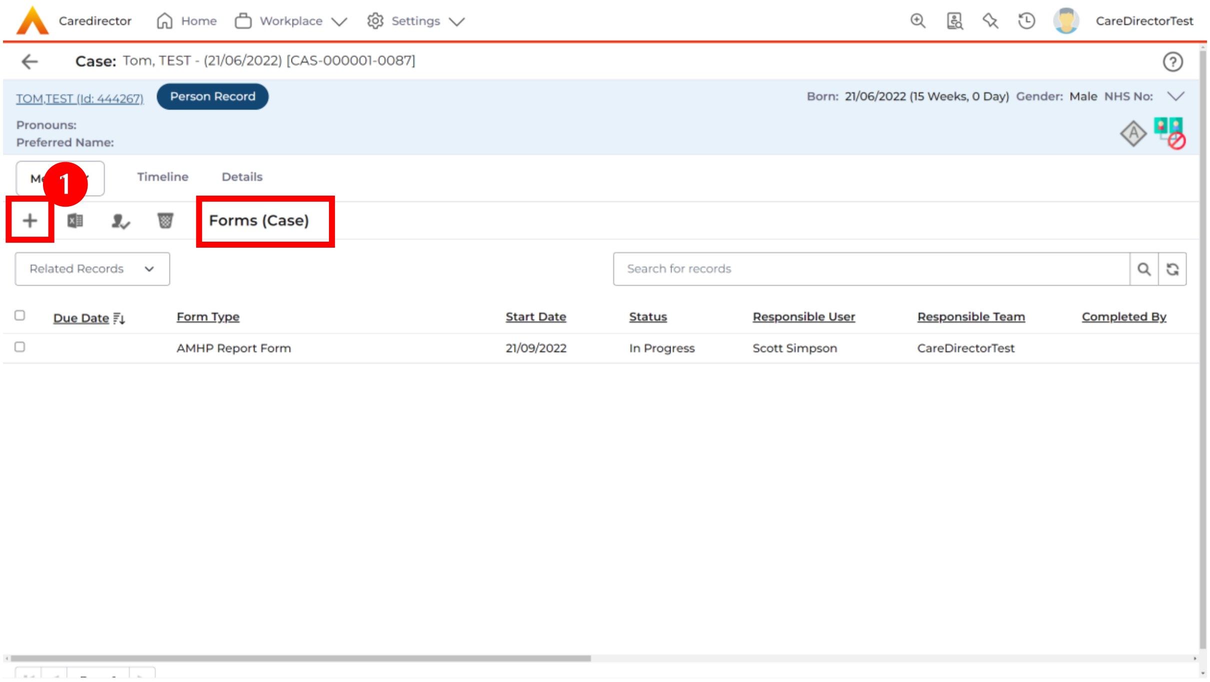
1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**. When found, select it to open the **Case Record**.



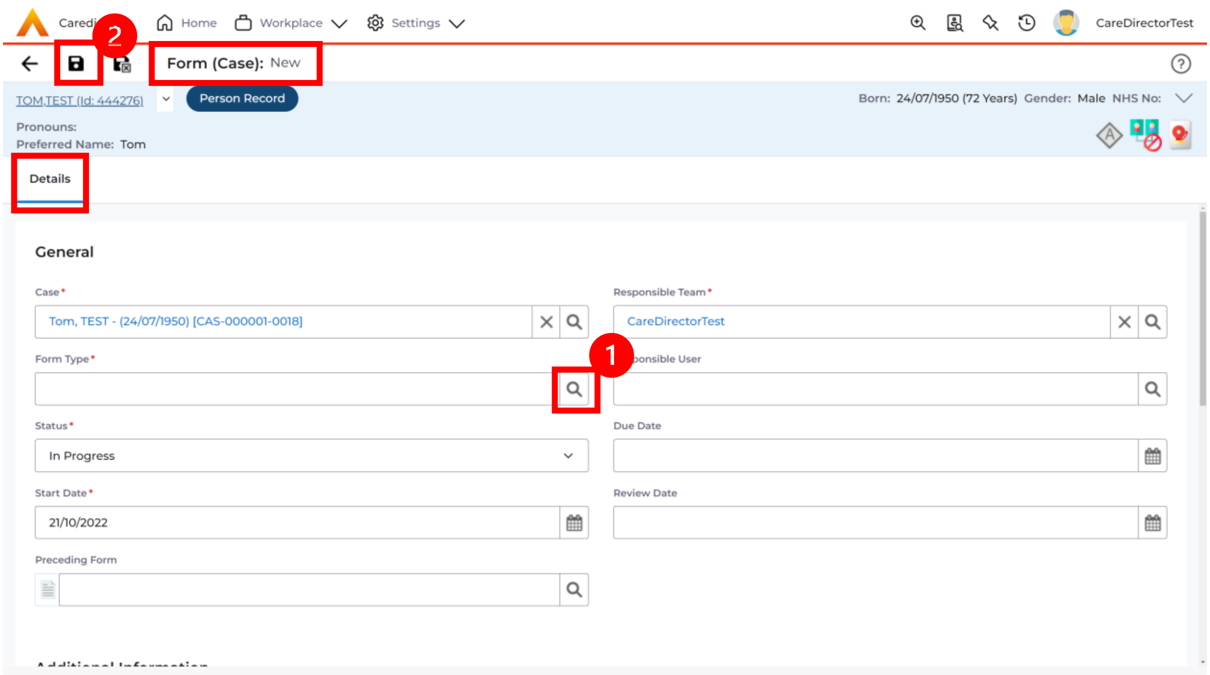
2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case).**



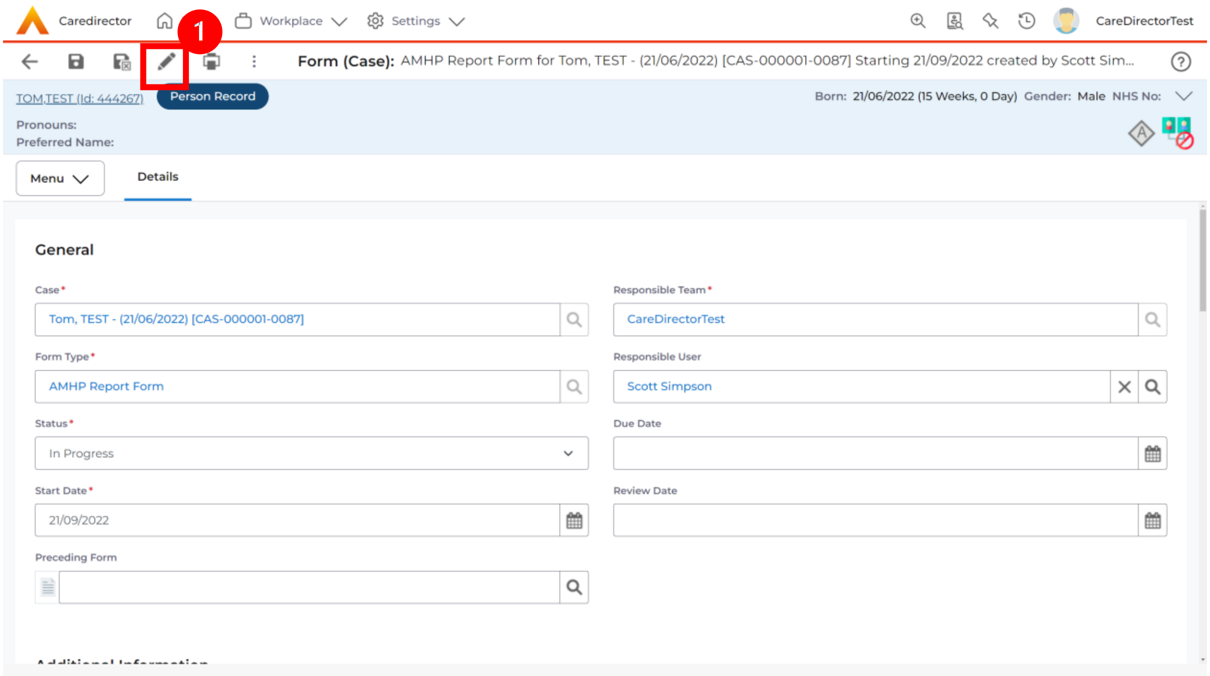
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



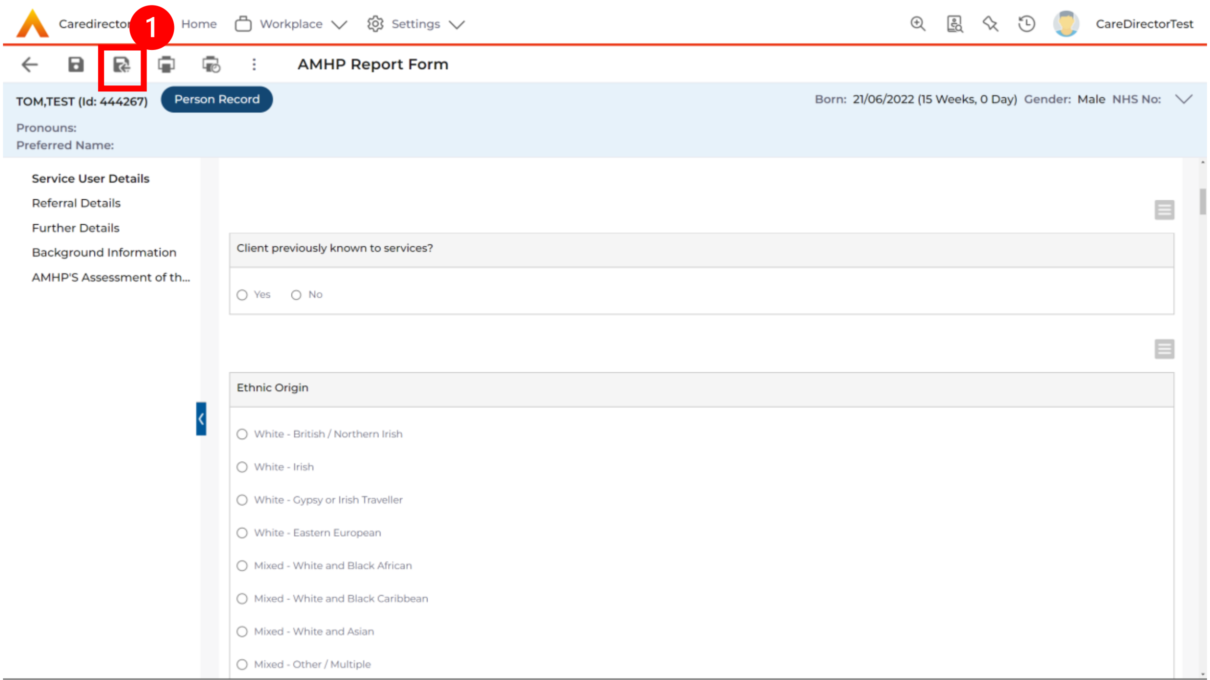
4. Once inside the **Details.** This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type.** When finished, select **Save.**



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.

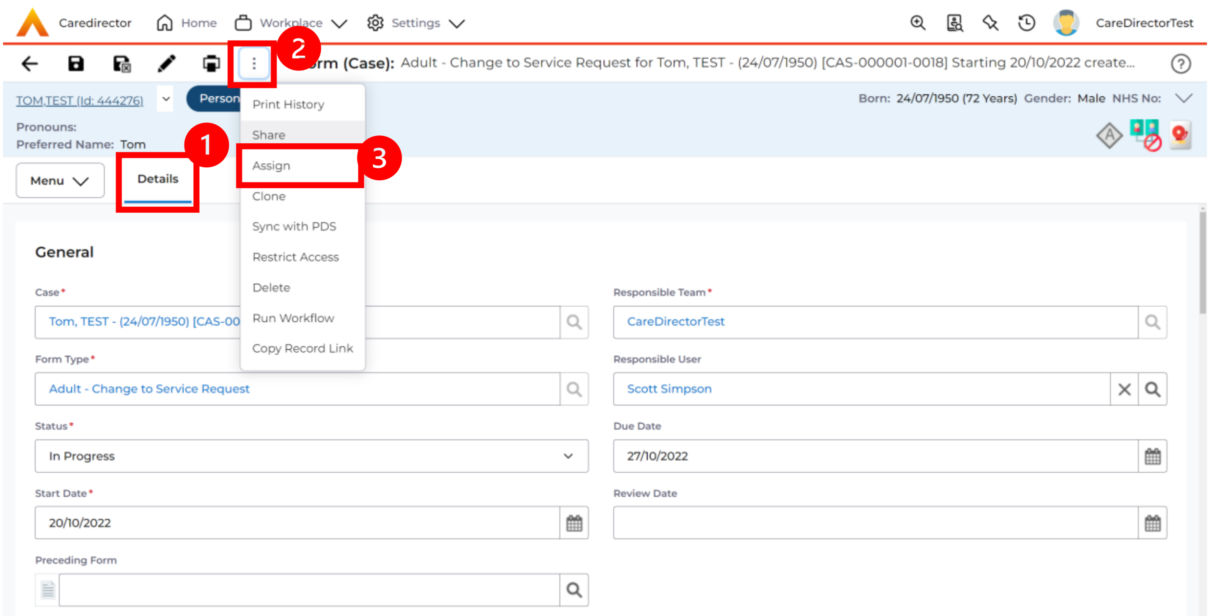


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

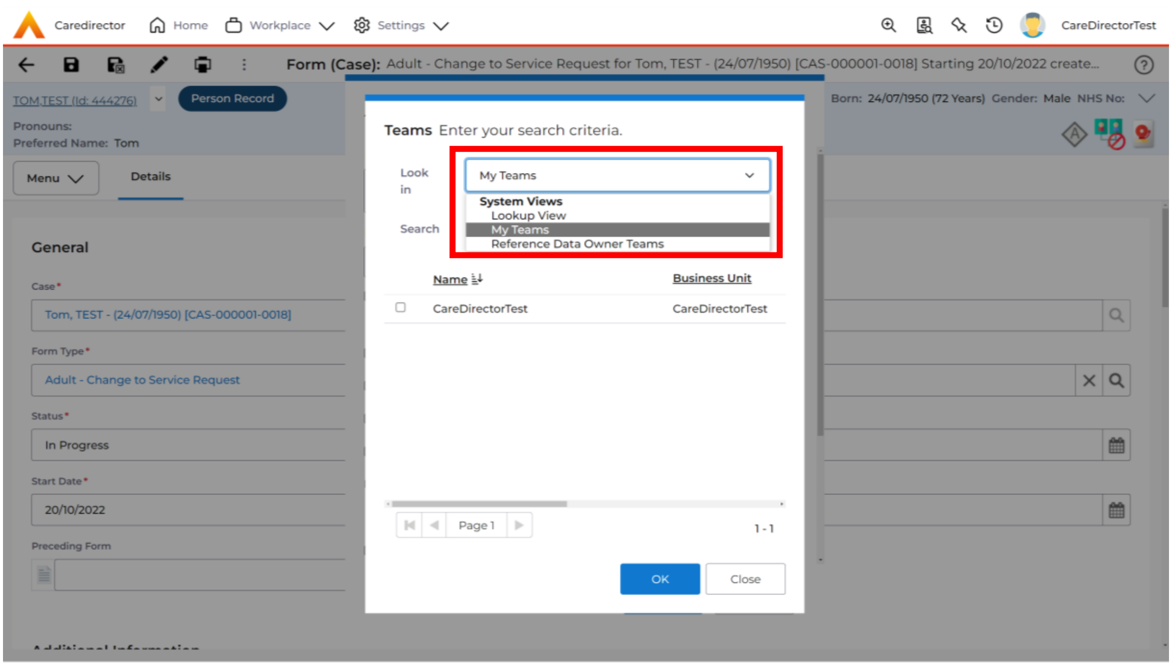


How to Allocate a Form

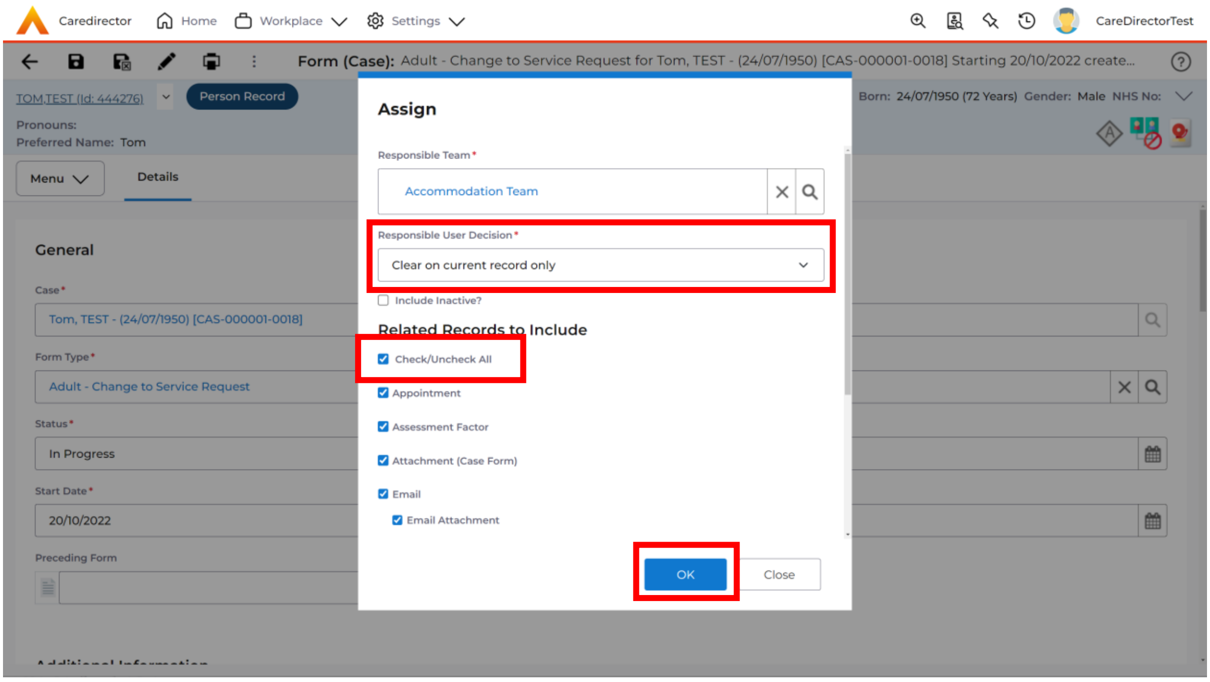
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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.

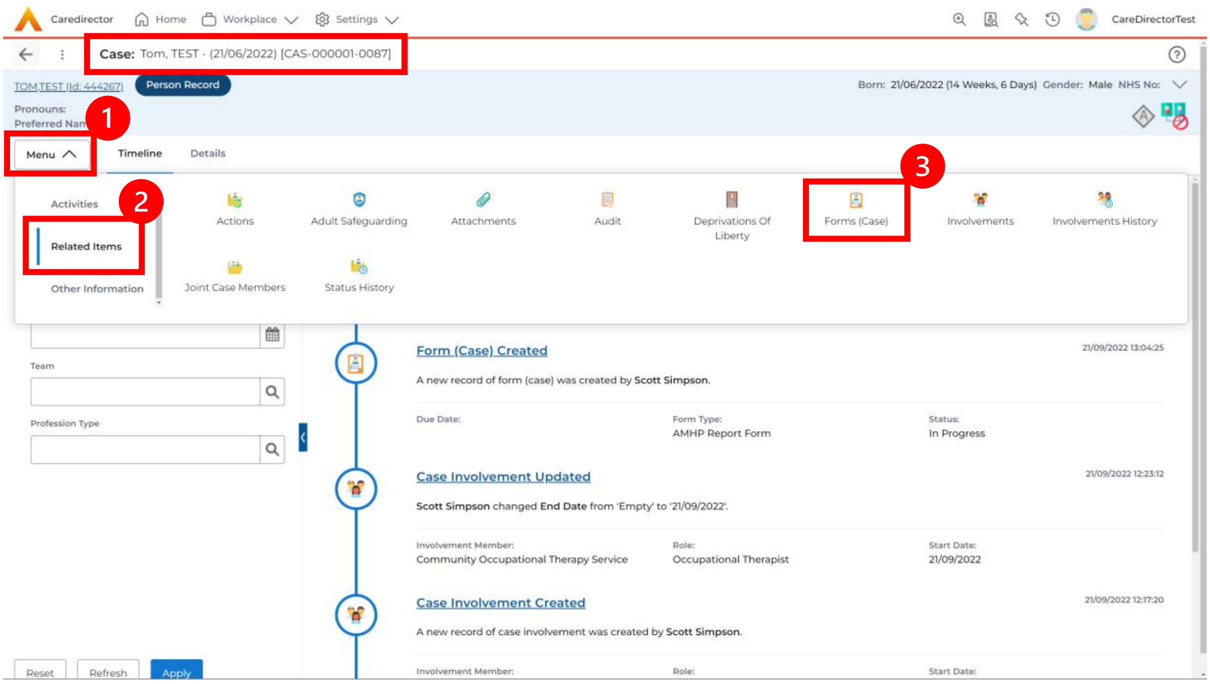


3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

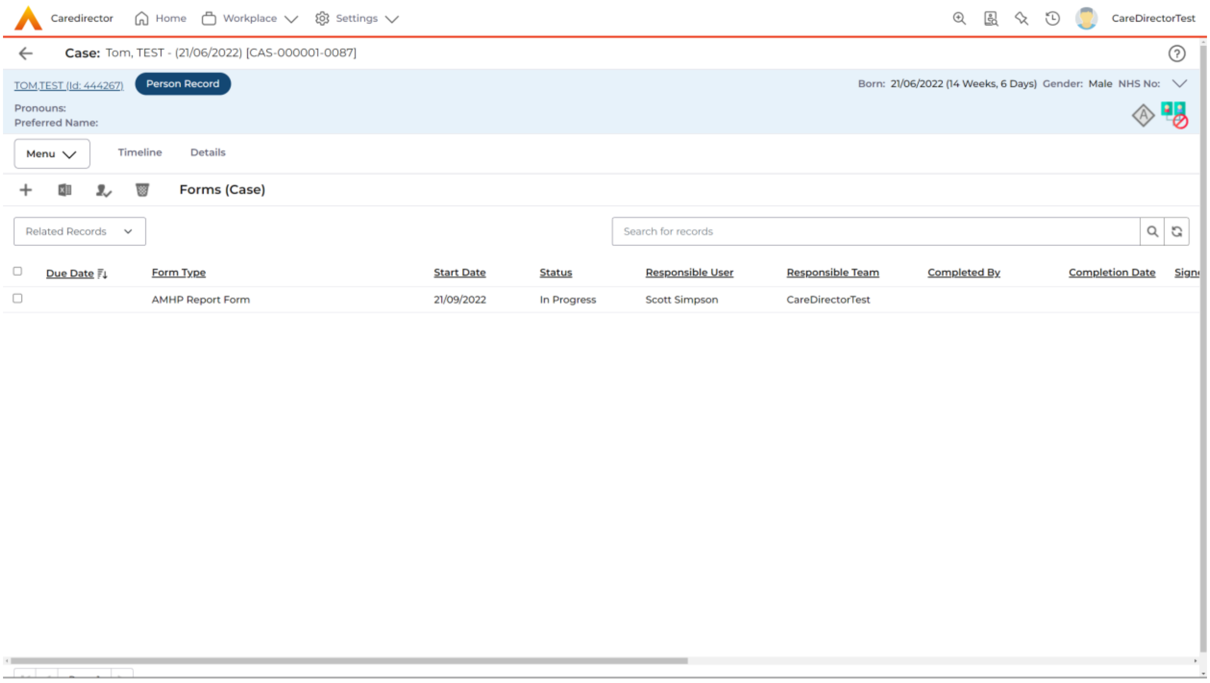


How to Clone a Form

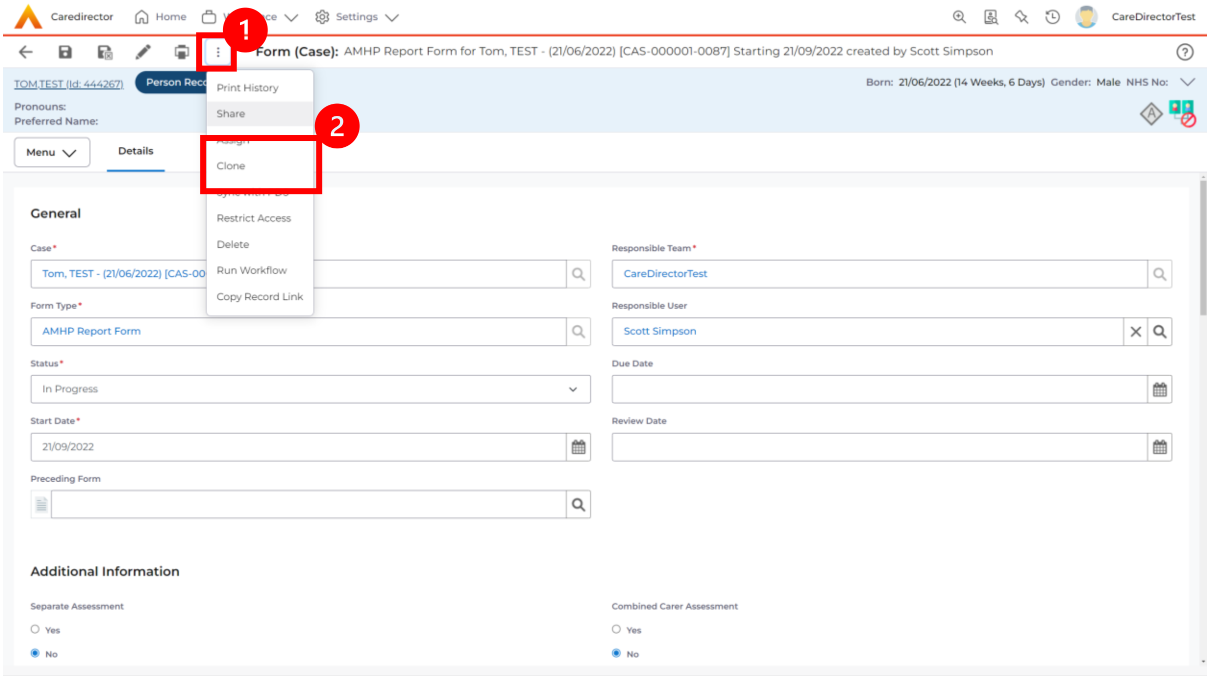
1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case).**



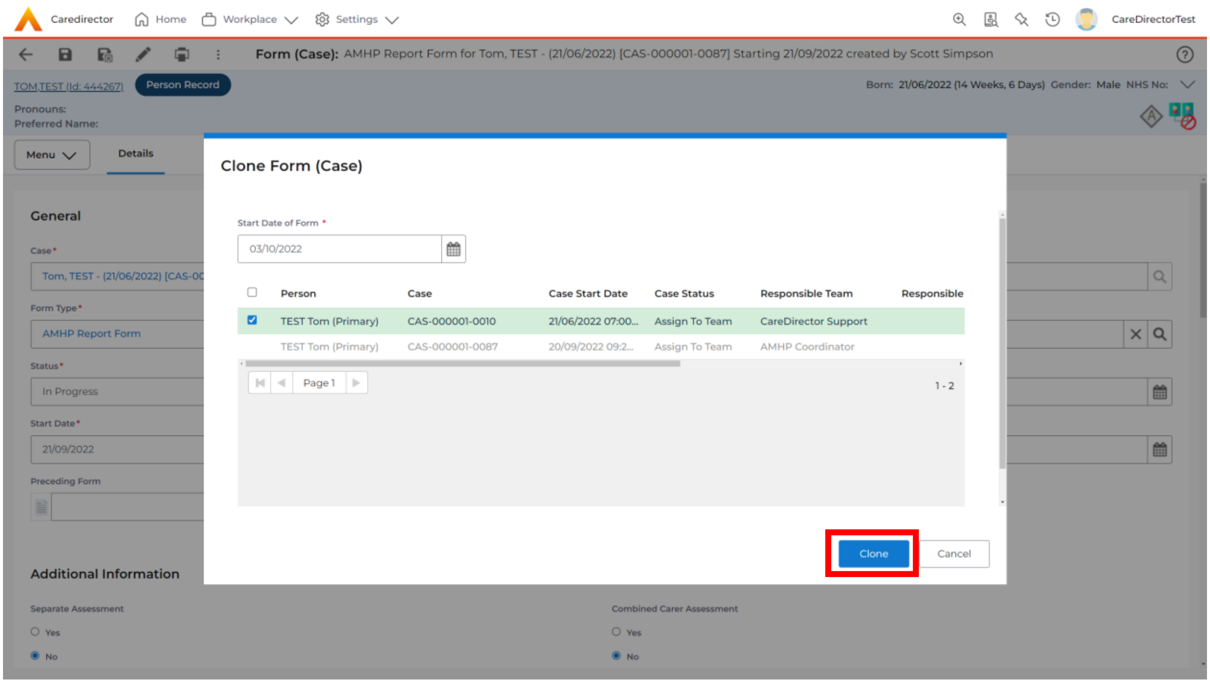
2. Select the relevant for **Form** to open.



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

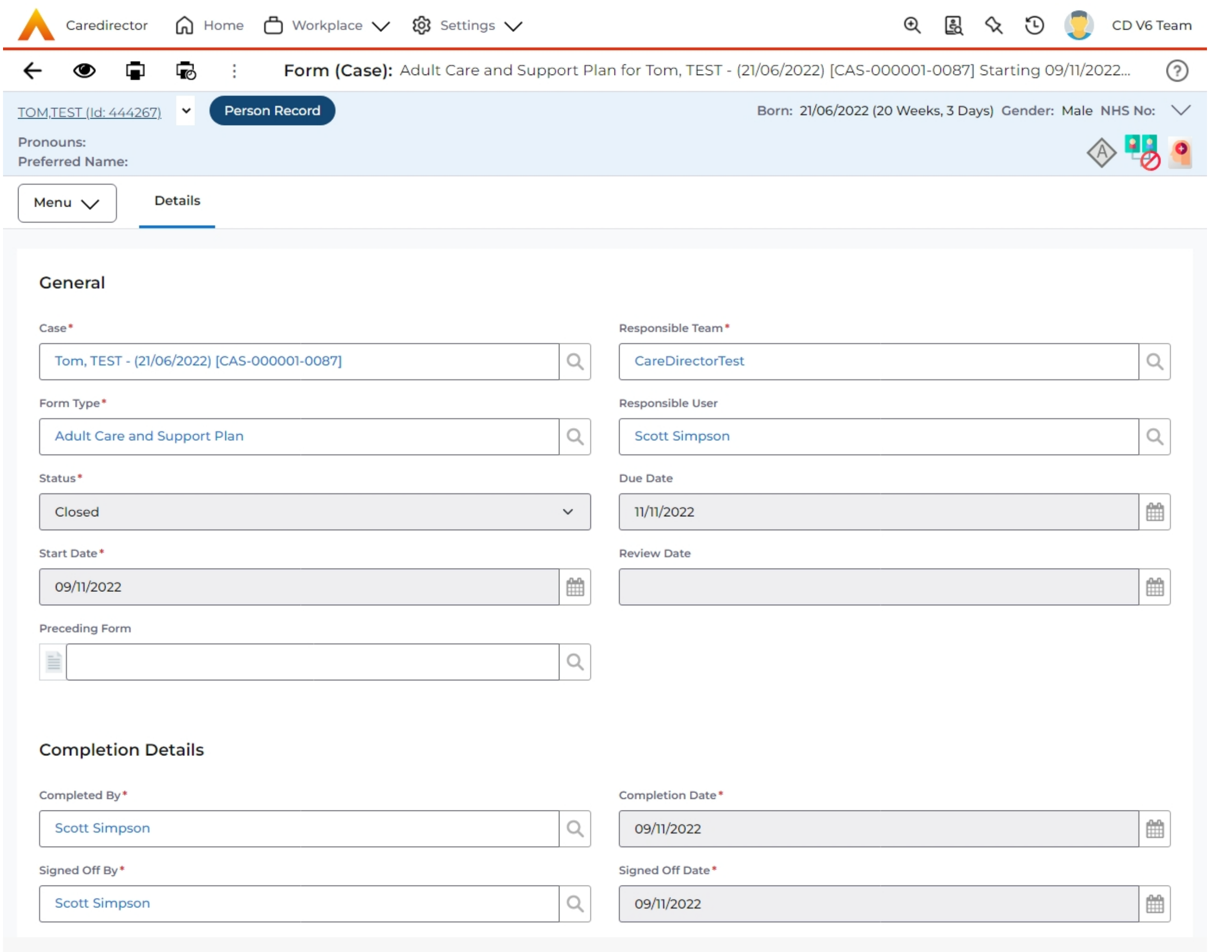


4. It will open a new window. Enter the **Start Date of Form.** Select which **Case** you would like this **Form** to be **Cloned** to. When check boxed, select **Clone.**



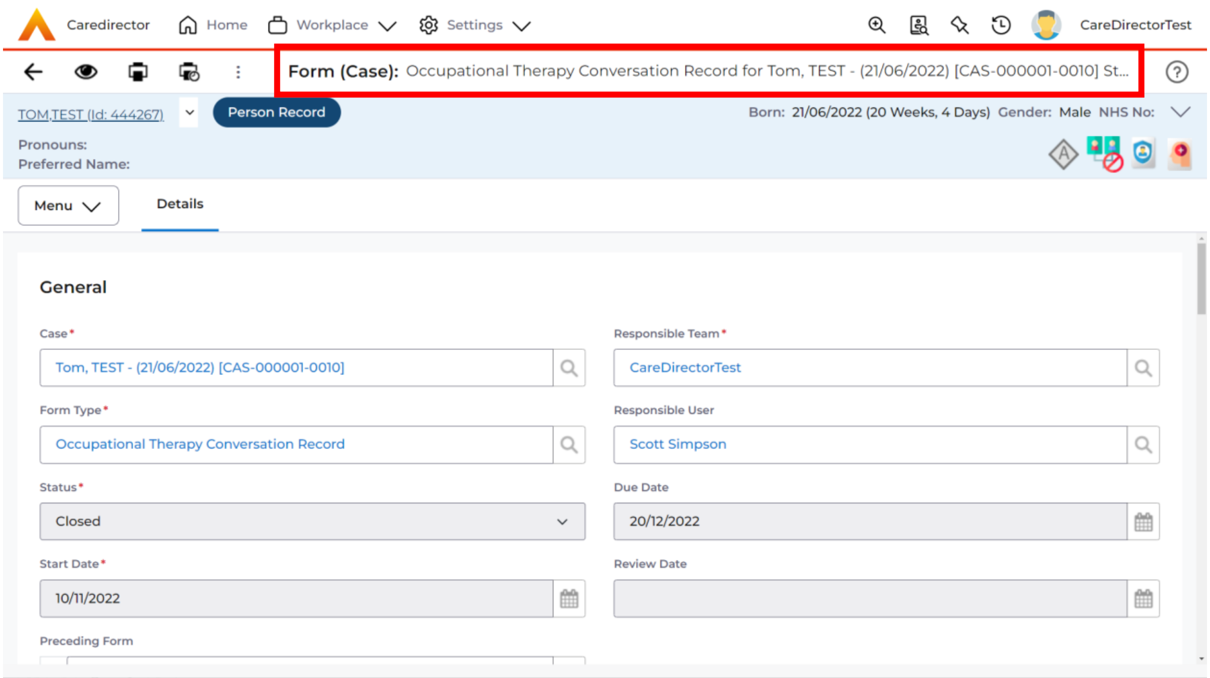
5. You do not need to **Save** this.

6. 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**.

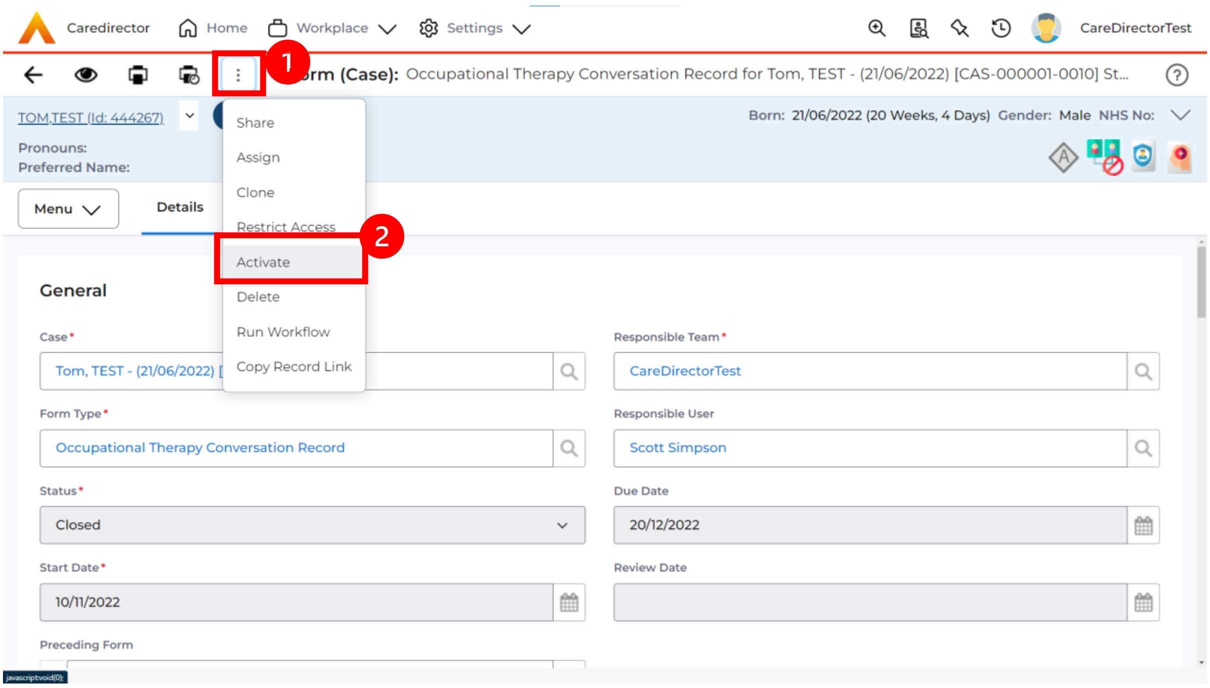


How to reactivate a Closed Form

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



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

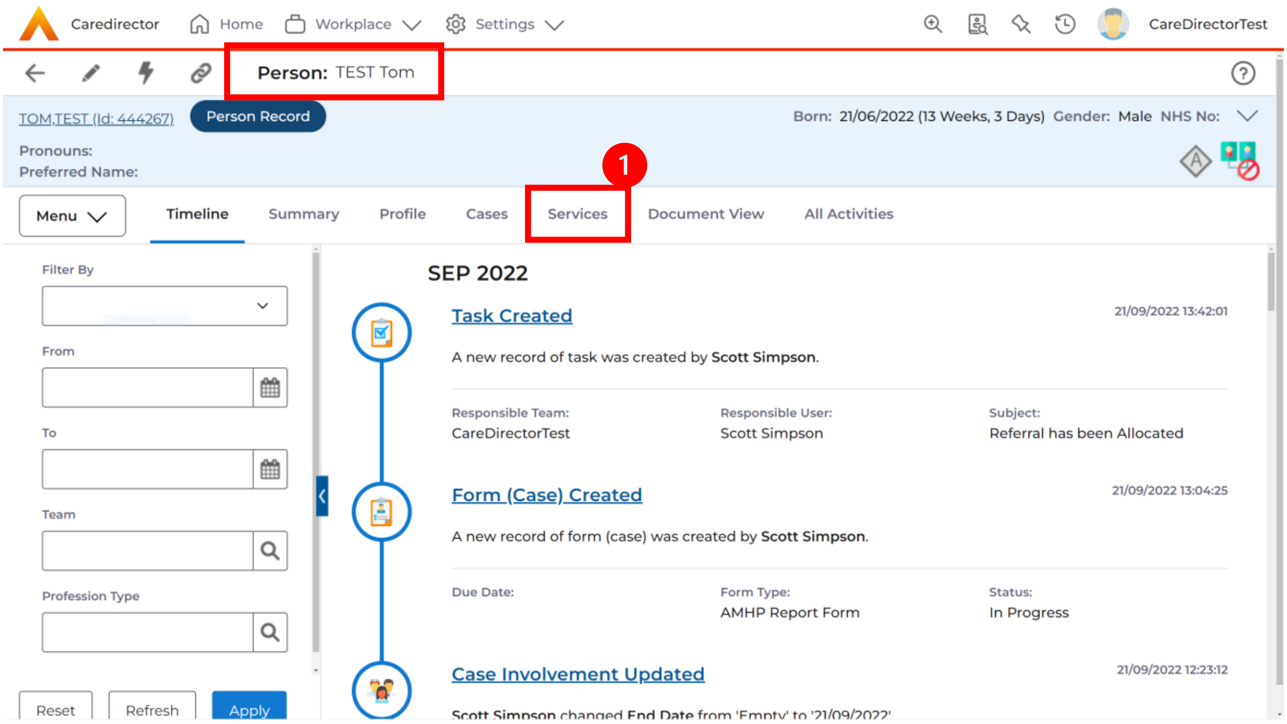


How to input Service Provisions

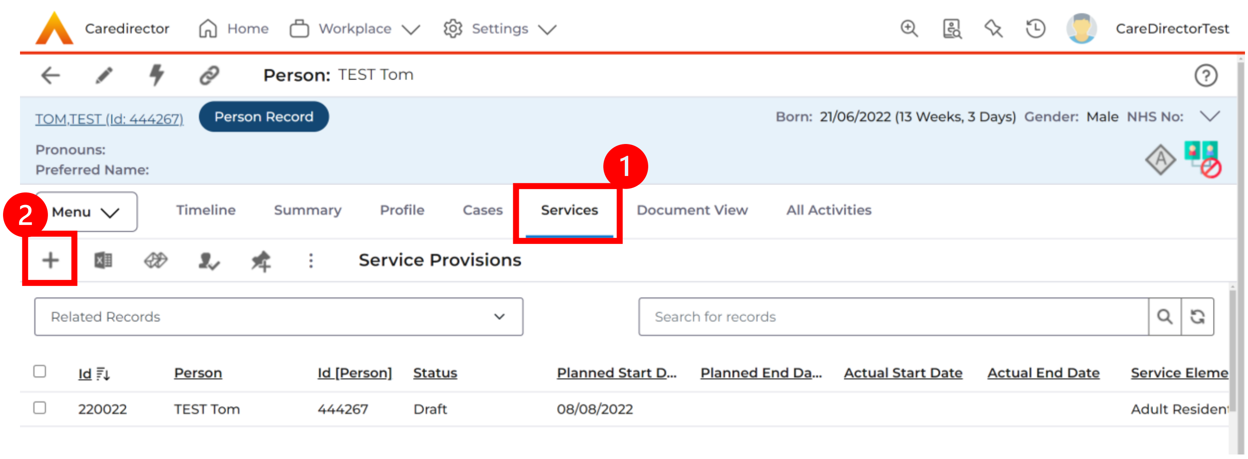
Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.

2. Select the relevant **Person Record** and select **Services**.



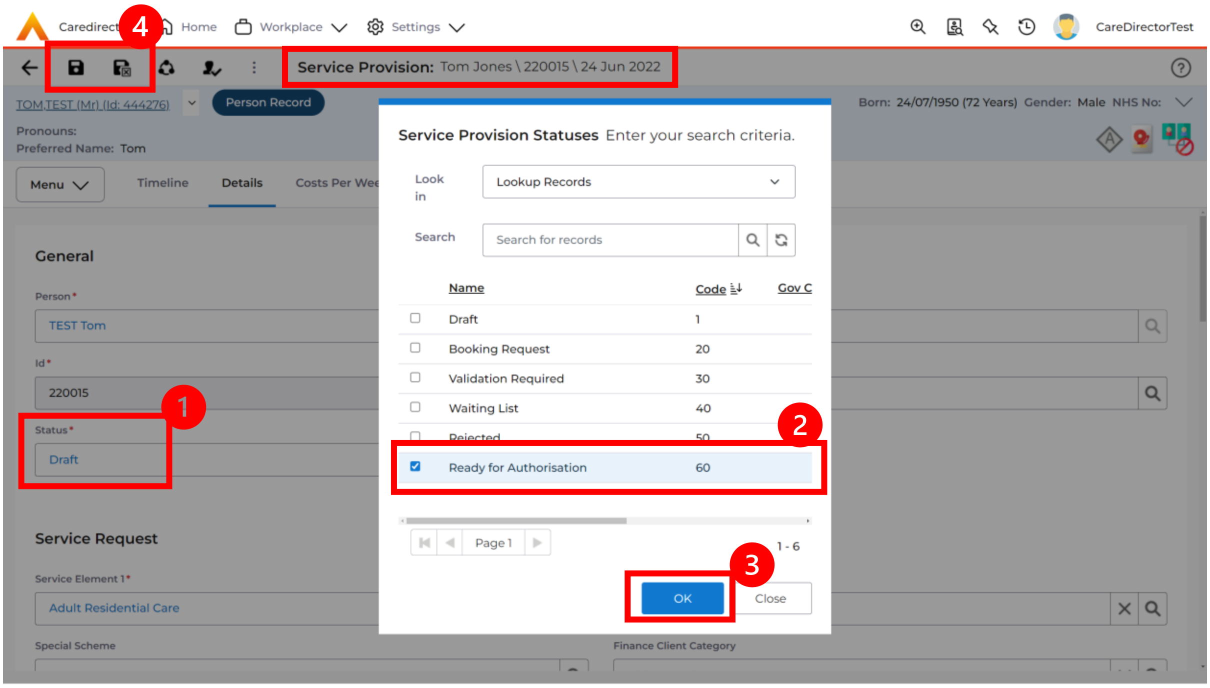
3. After selecting **Services,** if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



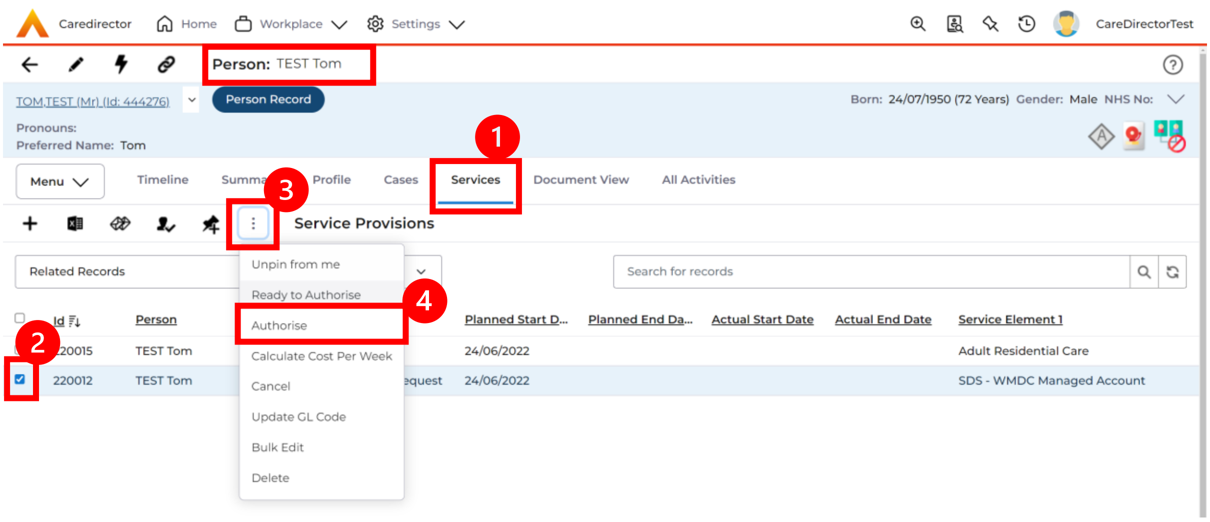
4. Then follow the appropriate section to complete the **Service Provision.**

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.**

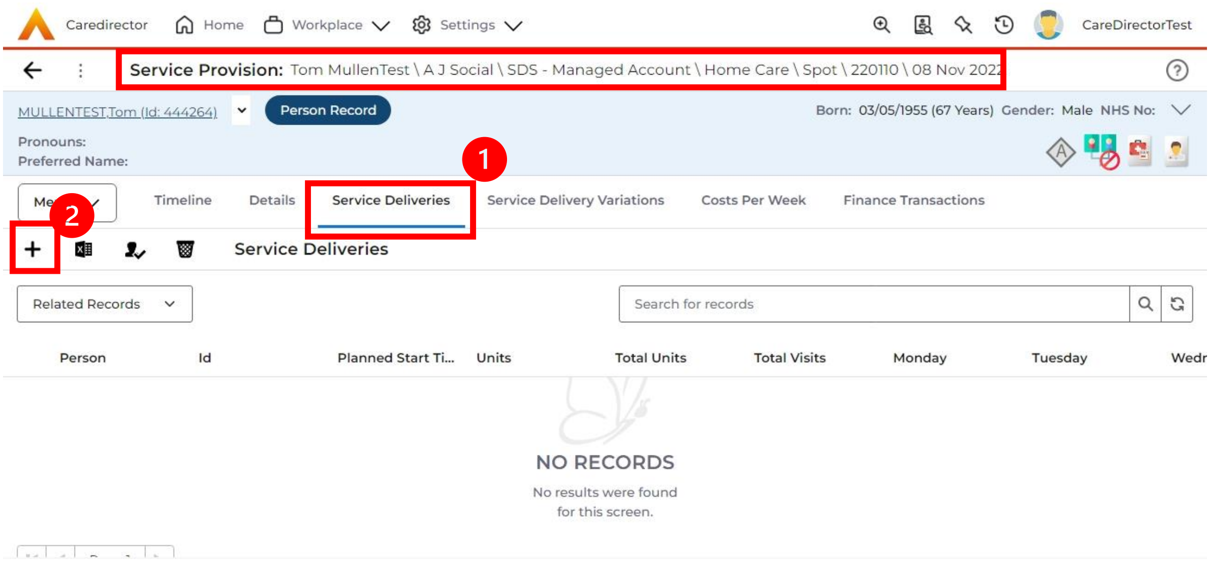


2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise.**



How to input Service Deliveries

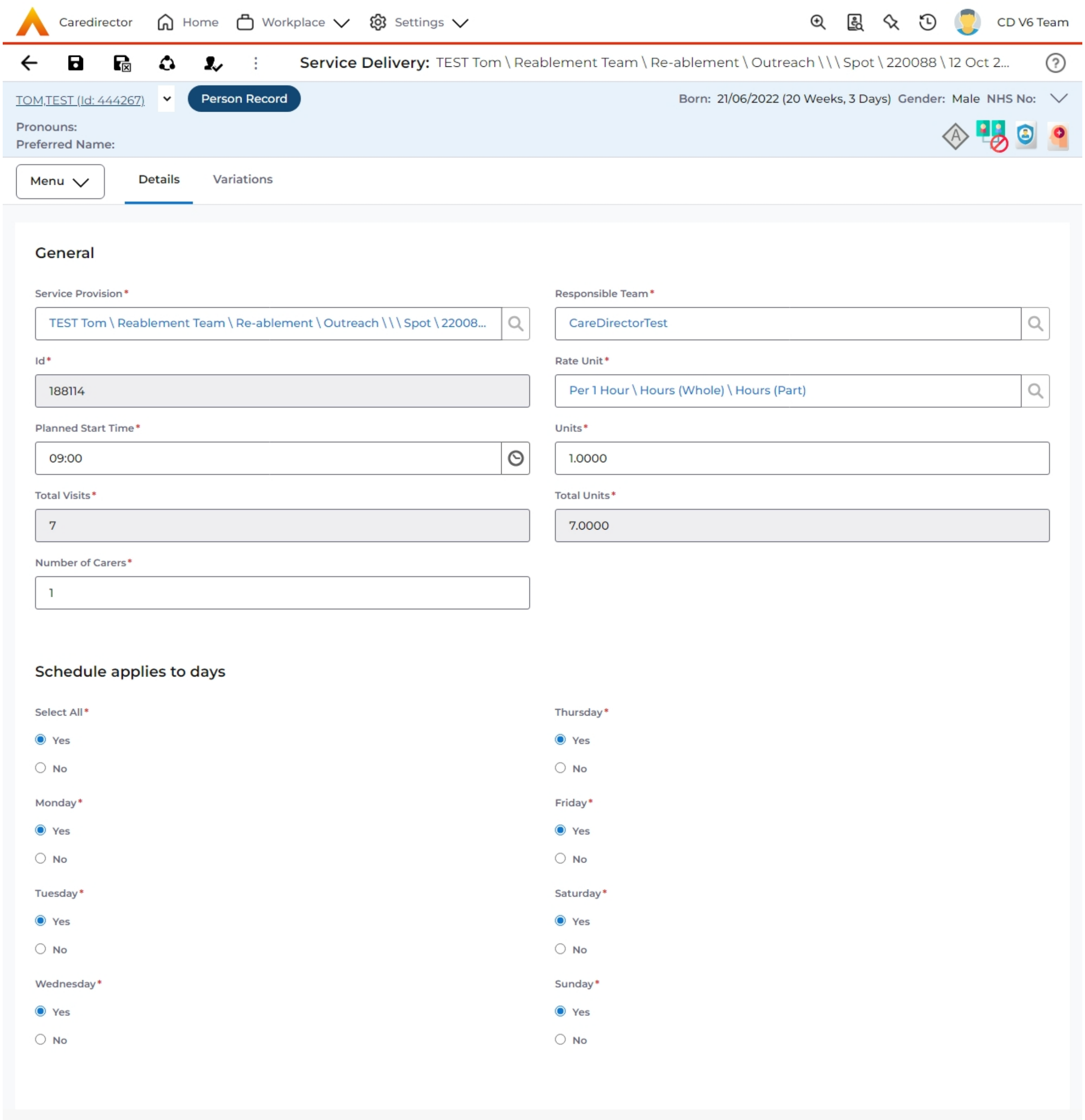
1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.



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.**

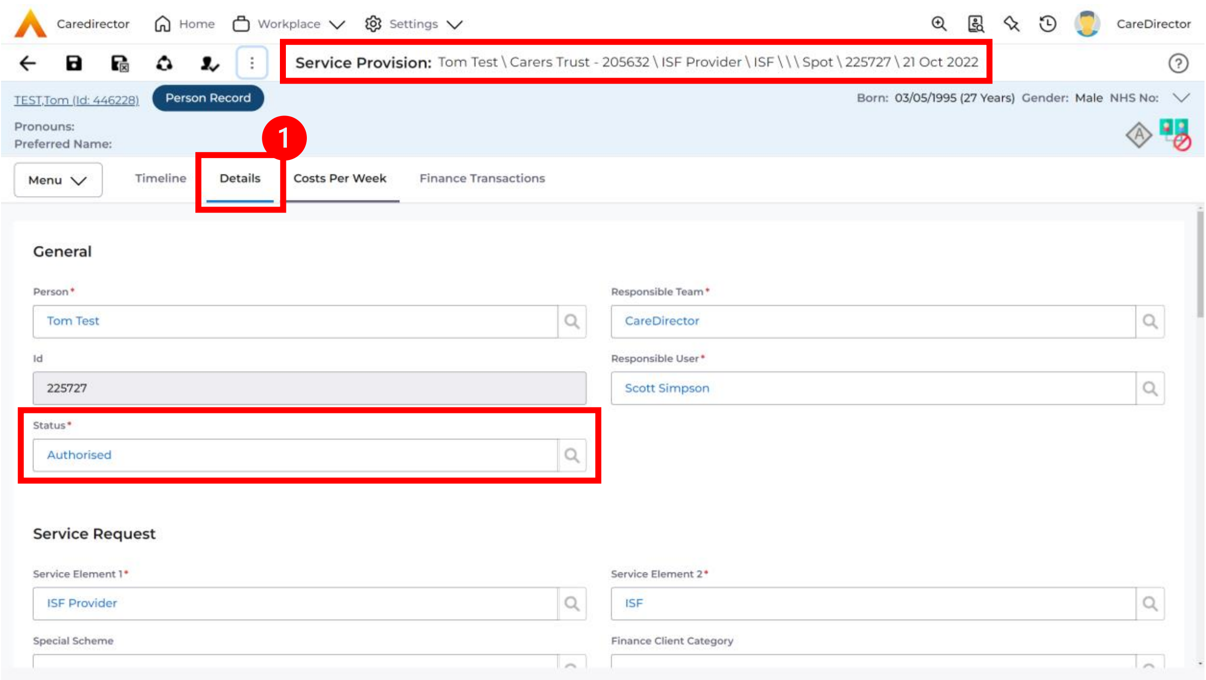
4. Once **Saved,** this will automatically generate **Total Visits/ Total Units.**



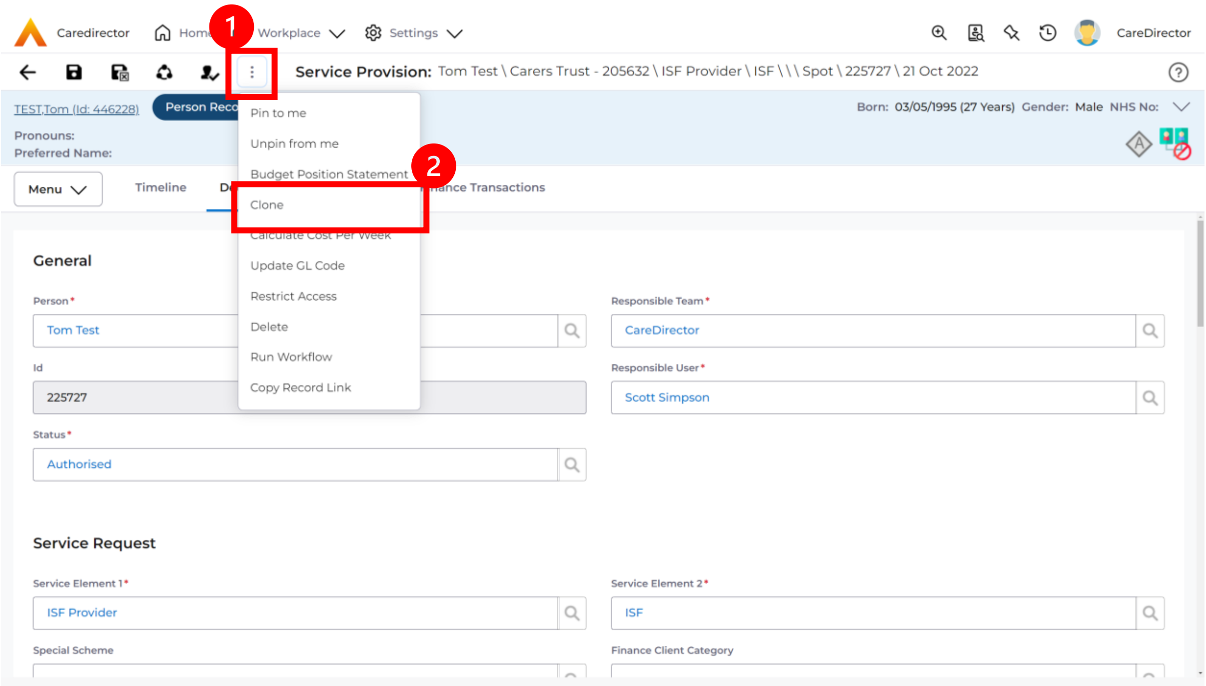
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

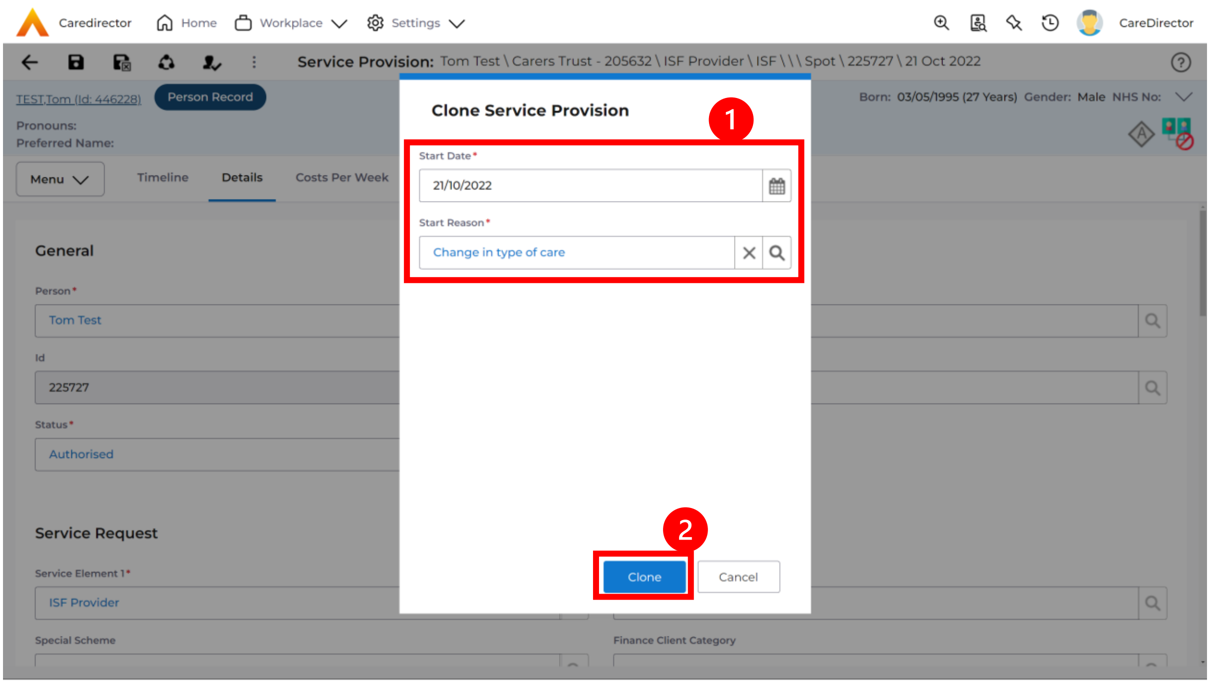
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised.**



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

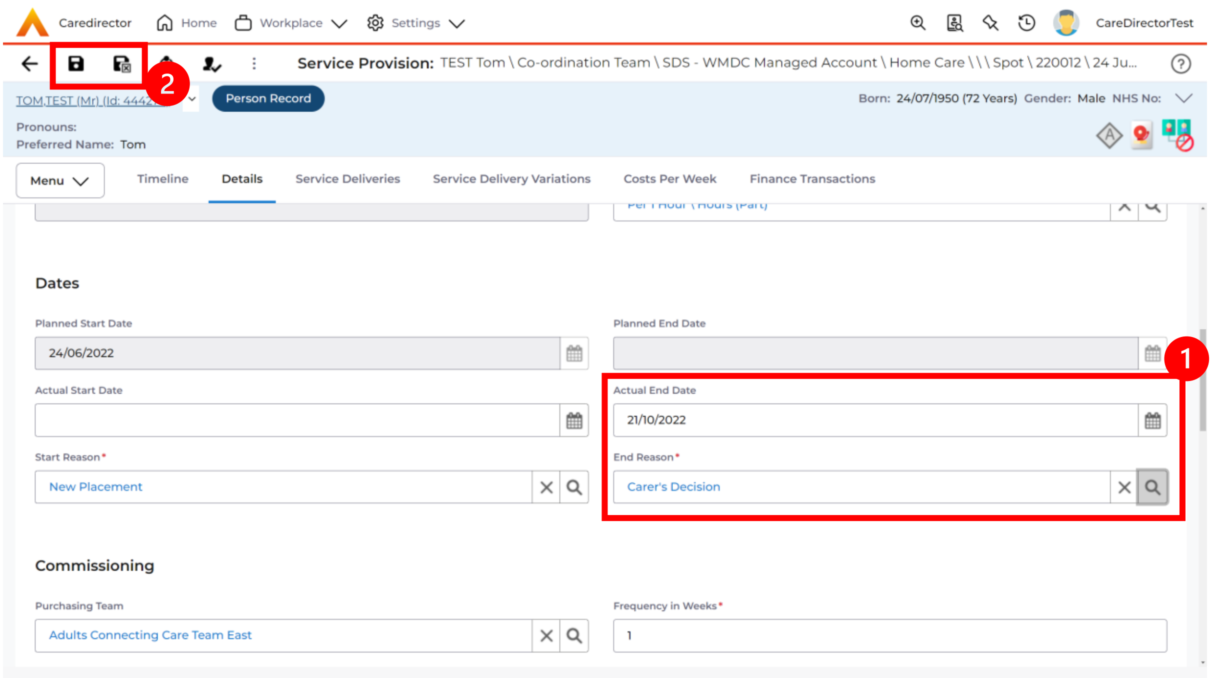


3. Select the new **Start Date** and **Start Reason** and select **OK**.



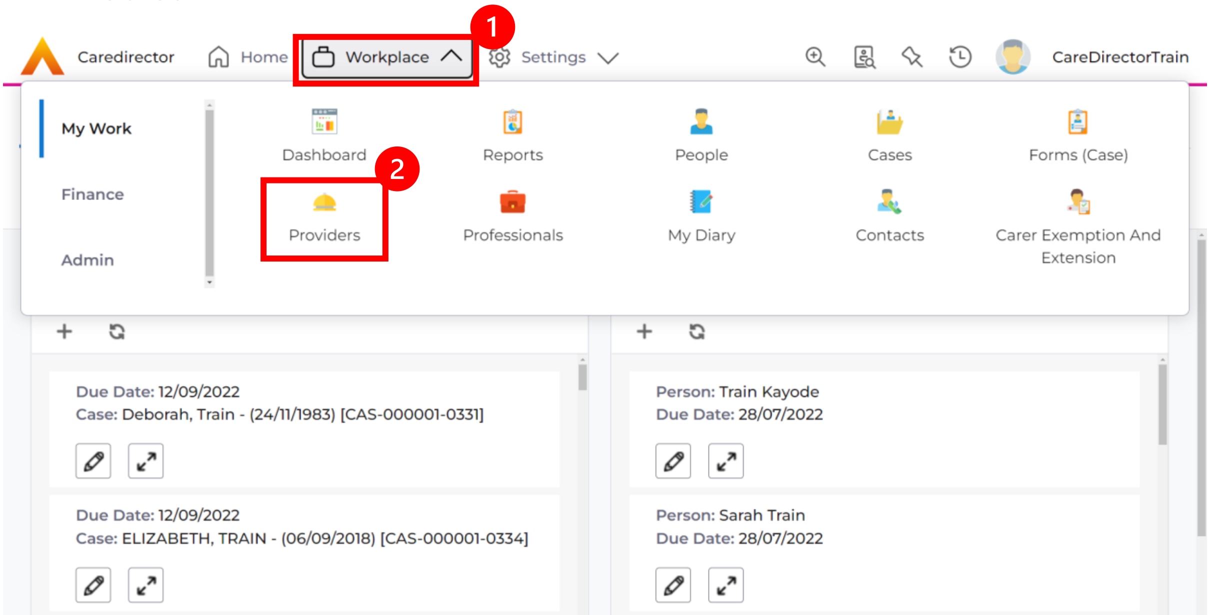
How to End Service Provisions

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.**

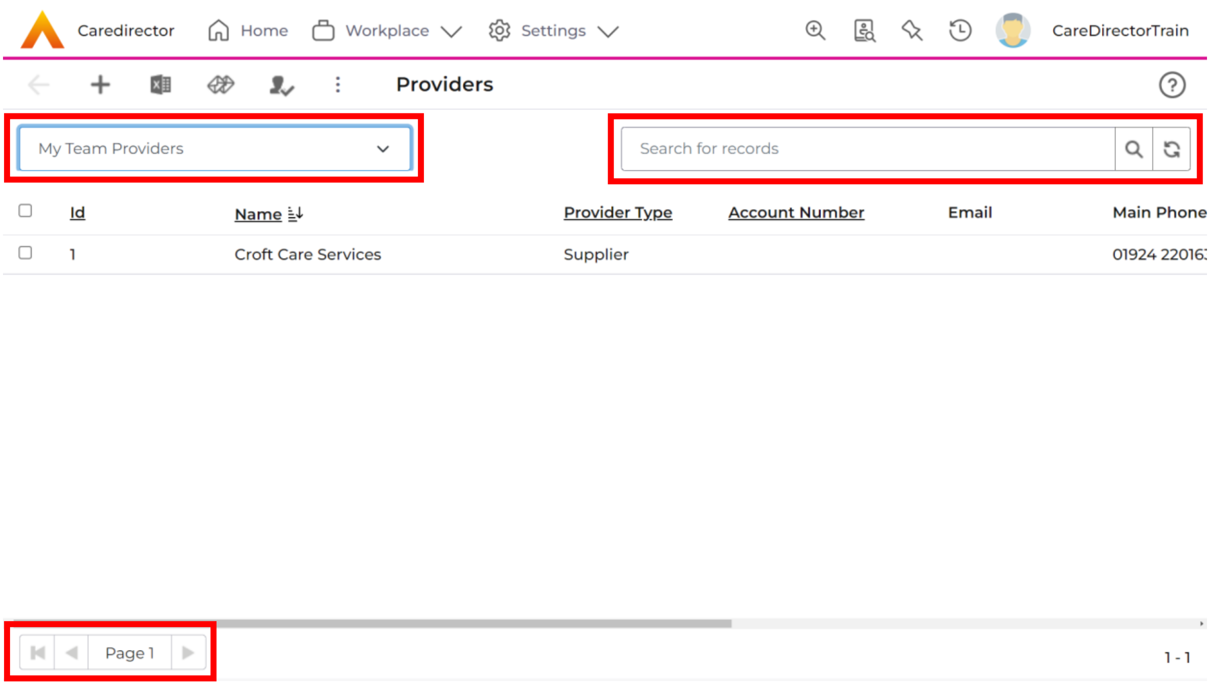


How to search for a Provider

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

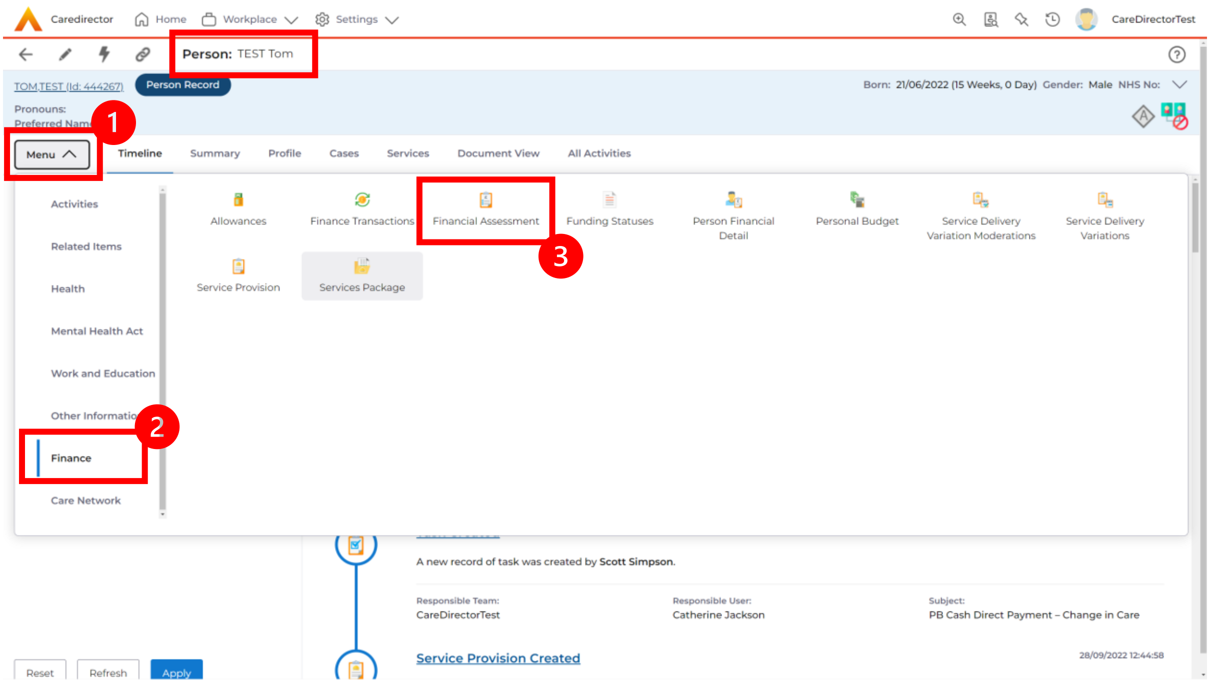


2. Use the **System View** or the **Search** box to enter in the name of a **Provider.** Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

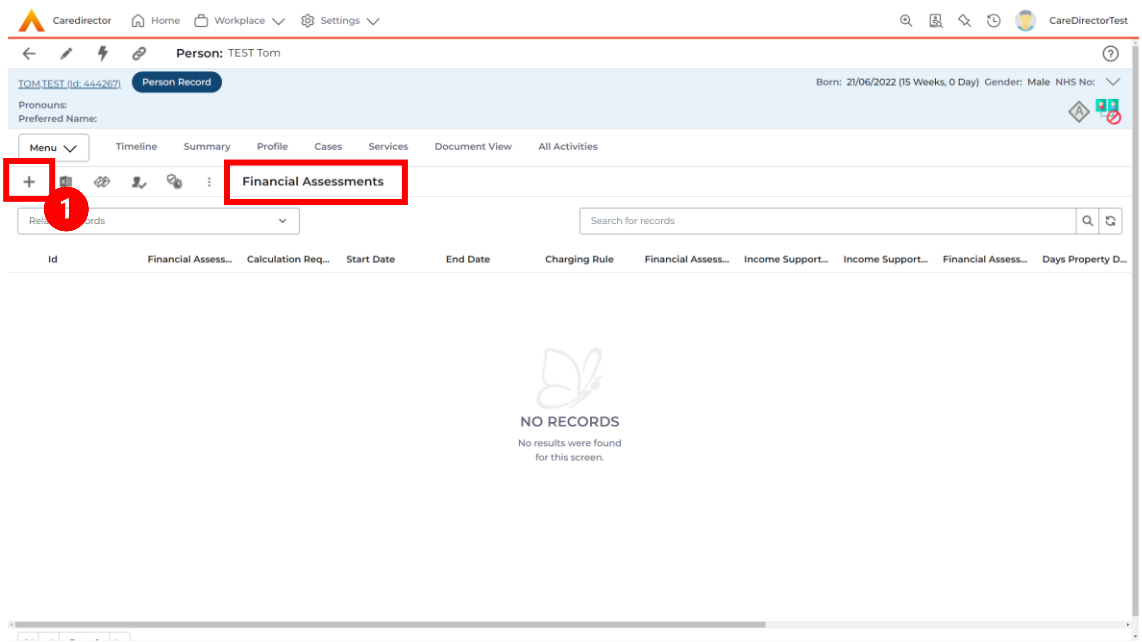


Where to find Financial Assessments

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.



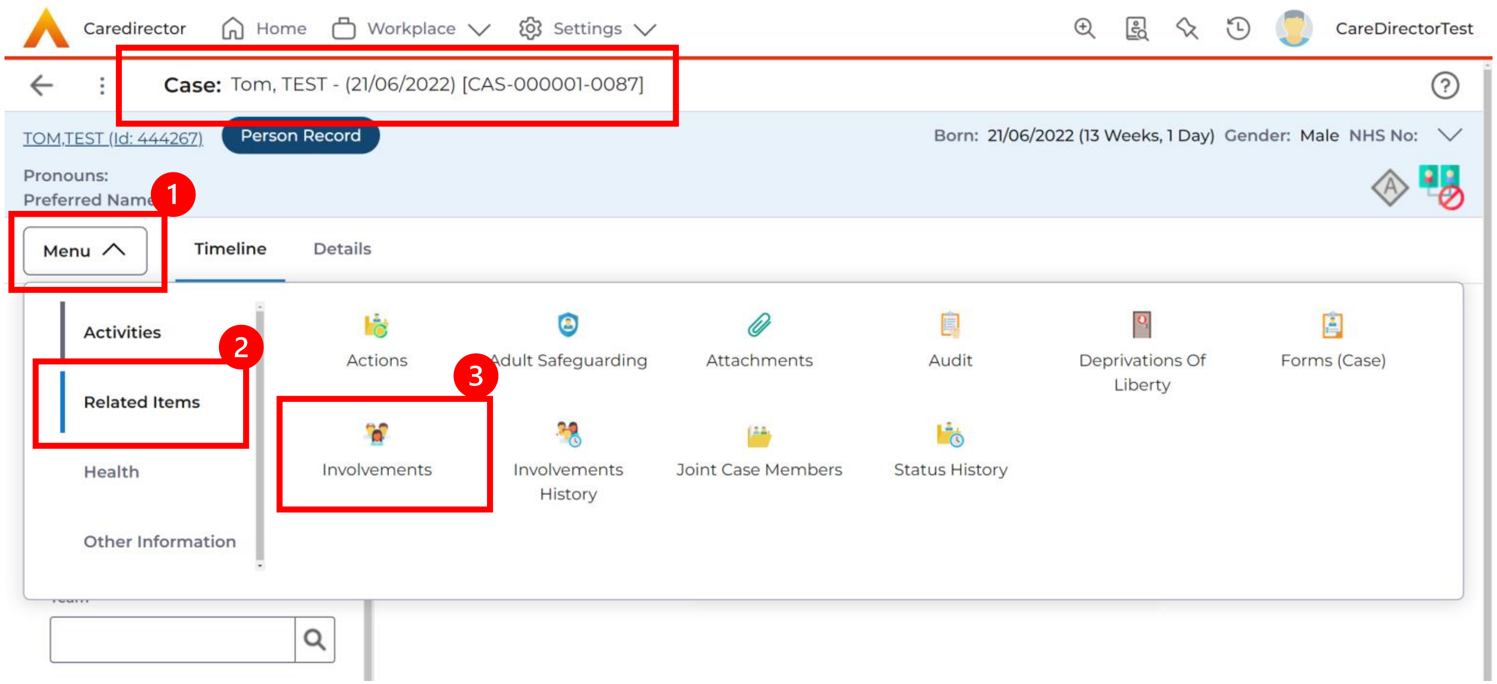
How to close a Case

Ending Secondary Involvements

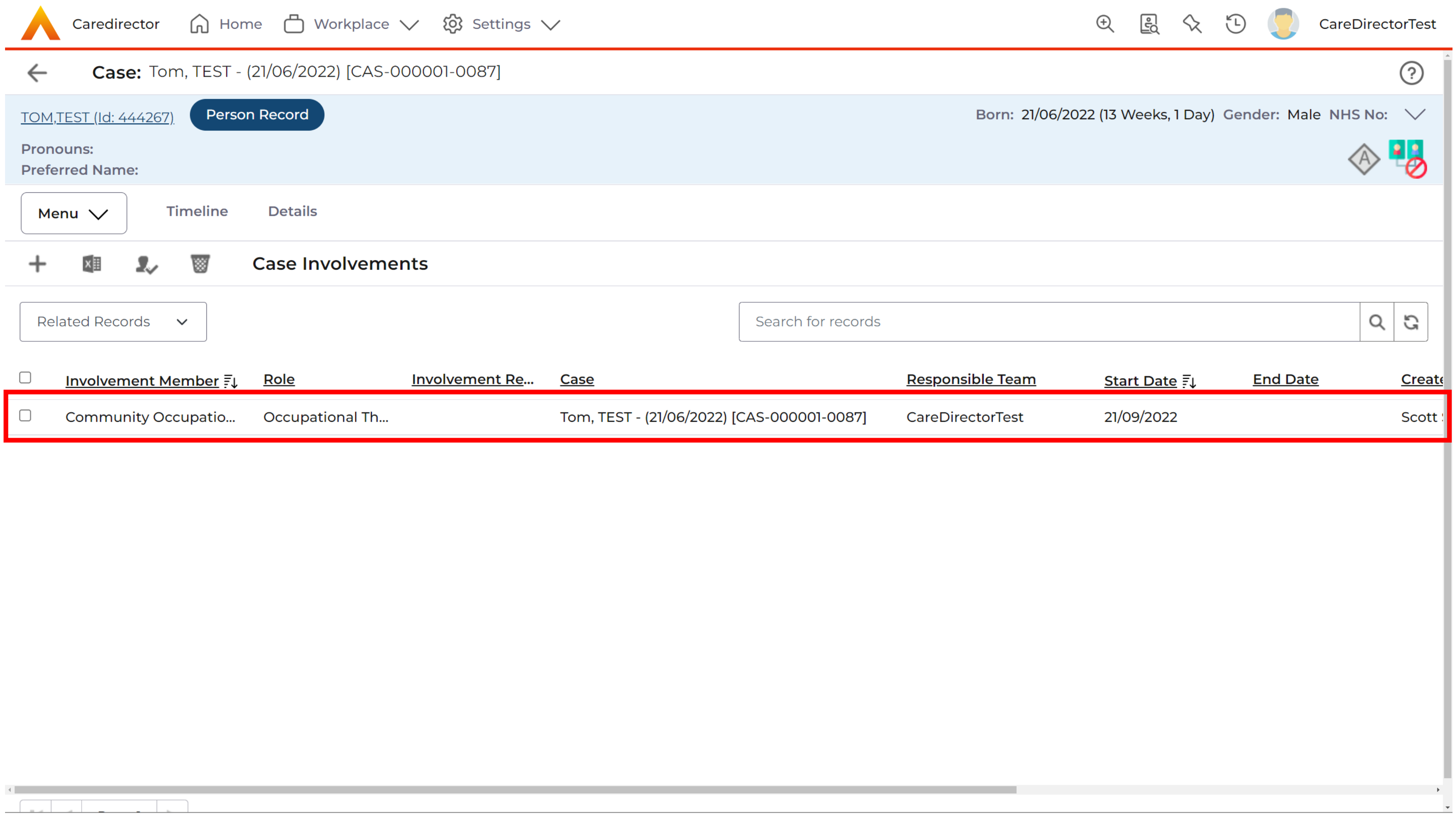
1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.

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**.

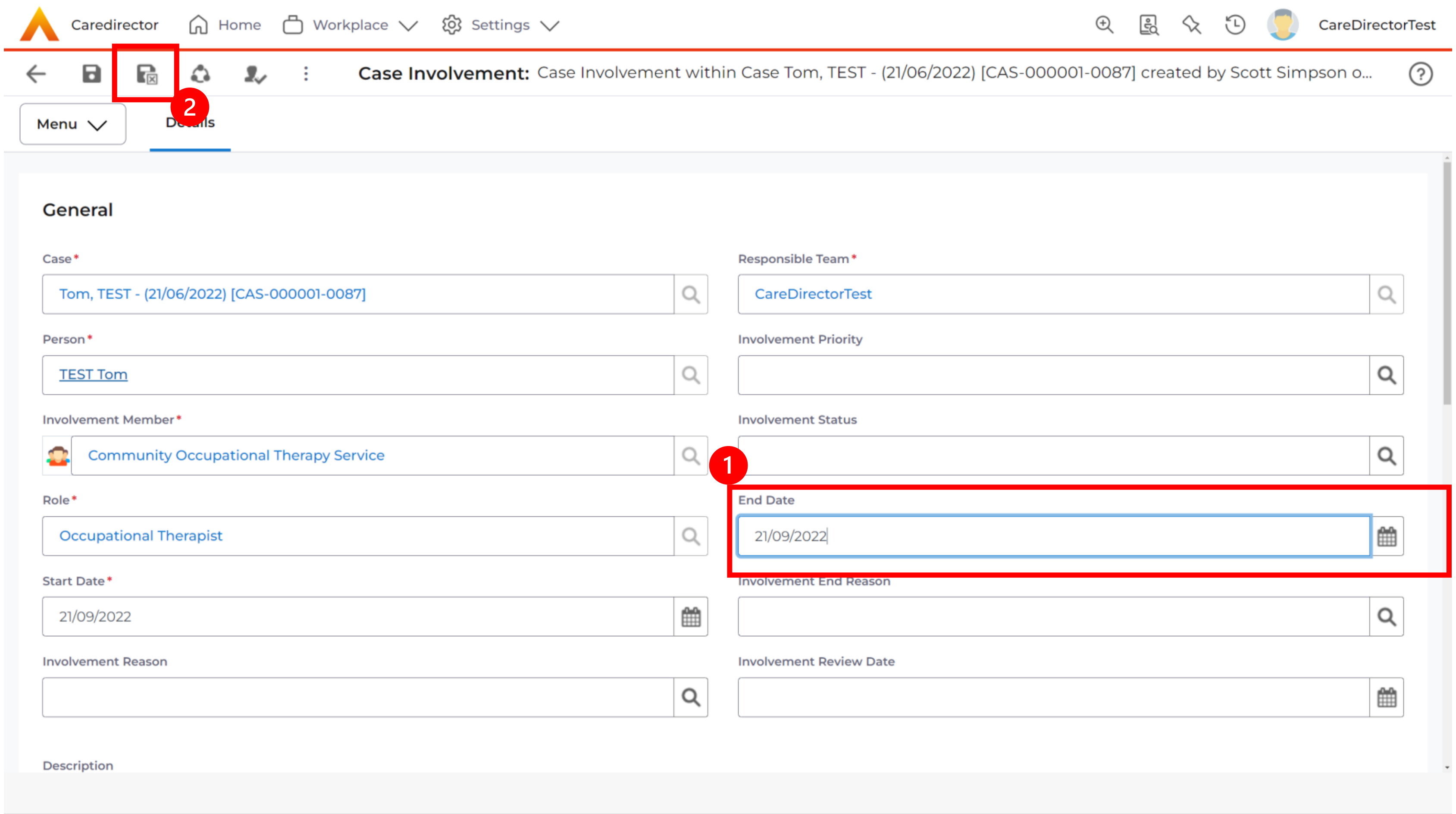
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements.**



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



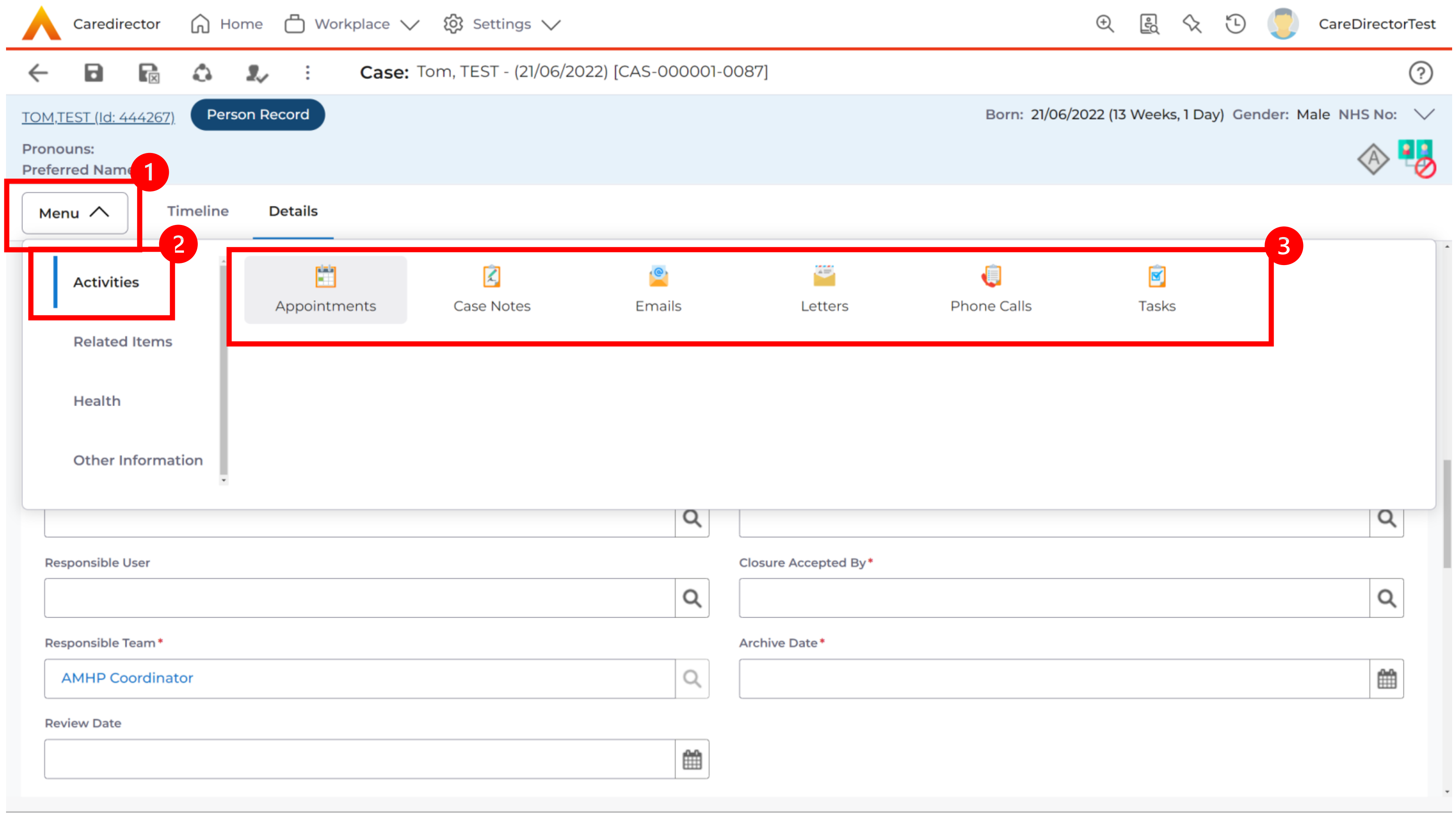
5. Enter today's date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Secondary and External Involvements** are ended.



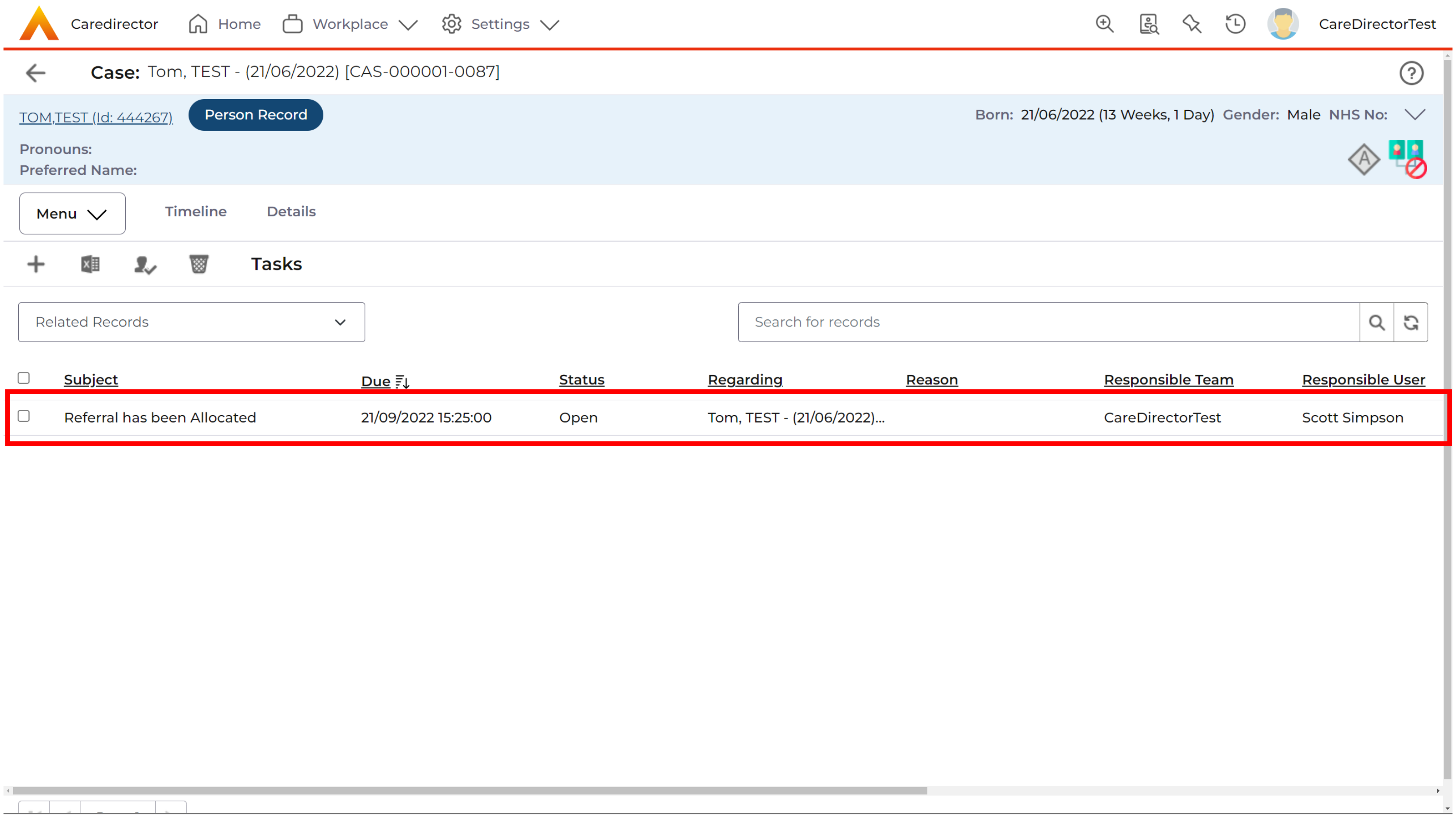
6. If the Case cannot be closed, there will be ongoing work associated with the Case.

Close an Open Activity

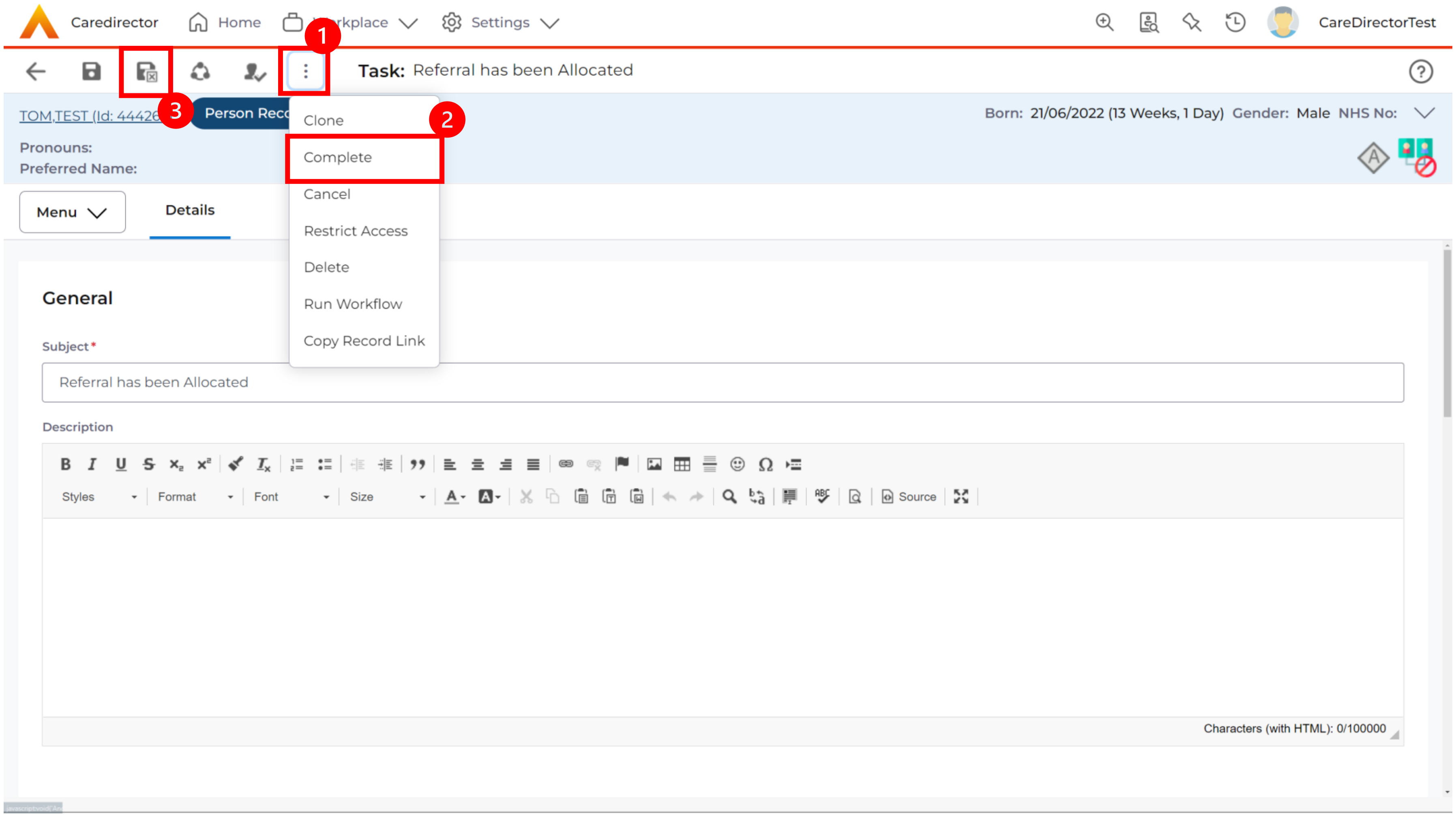
1. Select **Menu** within the **Case Record.** Then select **Activities** and open the relevant location of an activity.



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

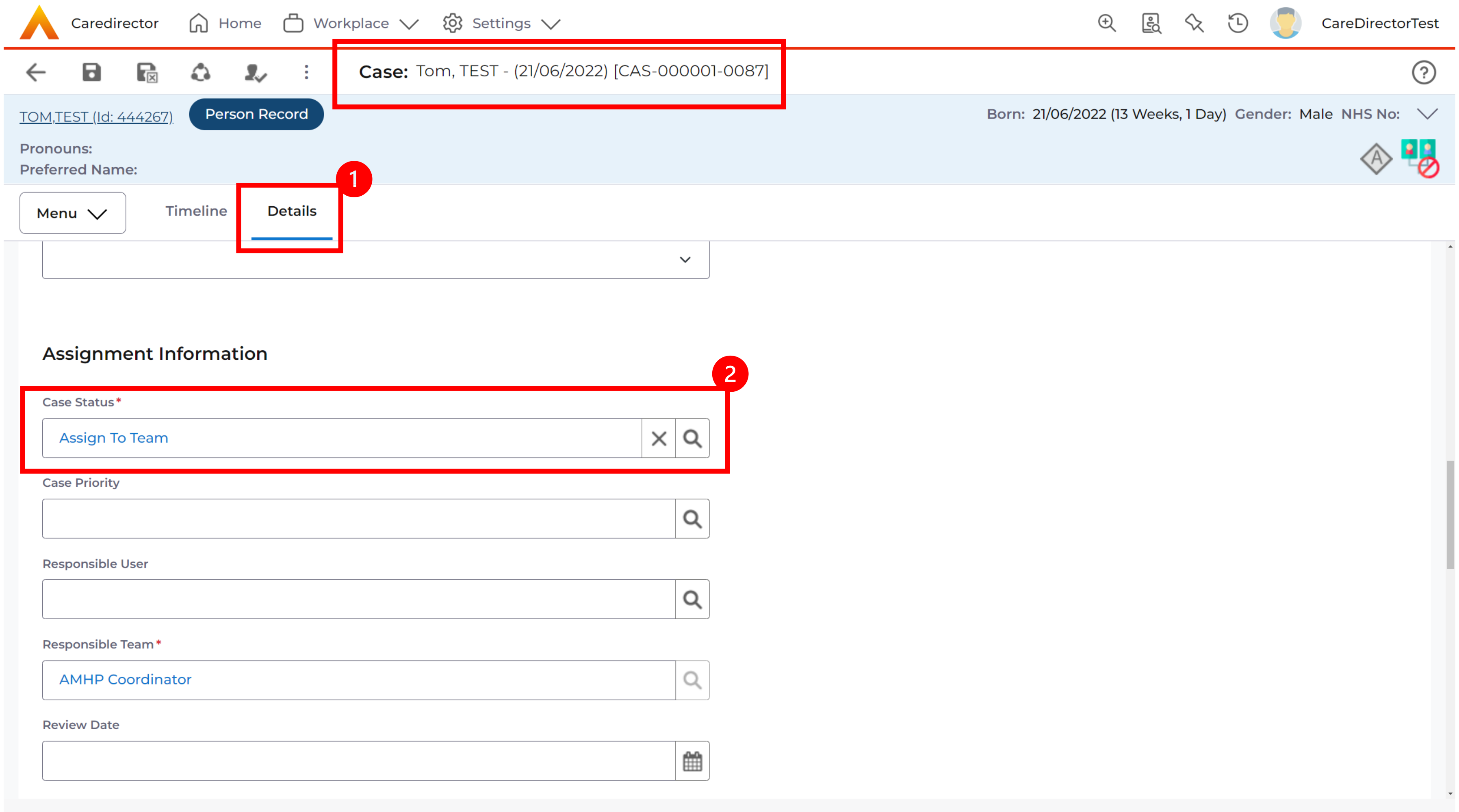


3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page.**

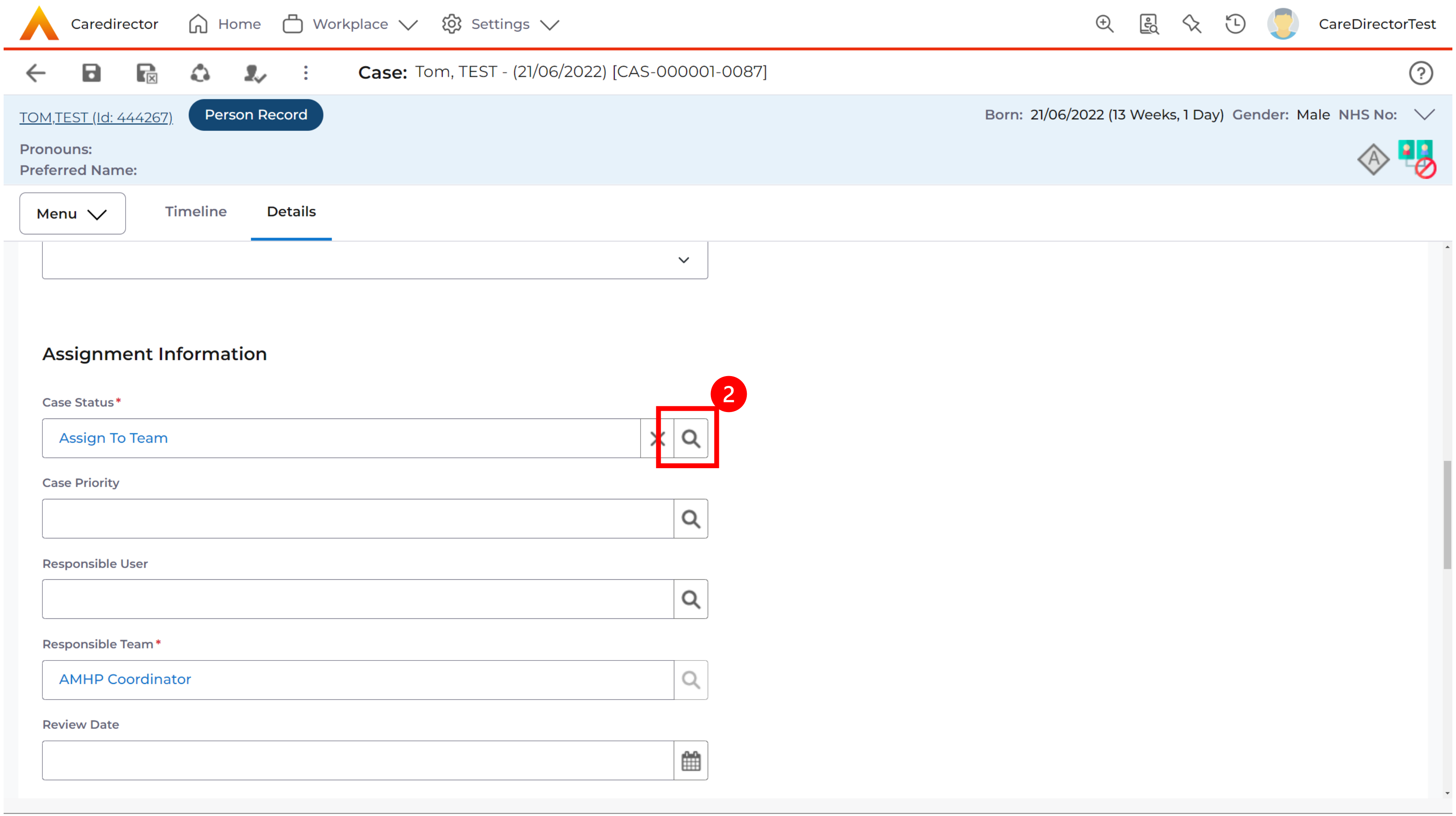


Closing a Case

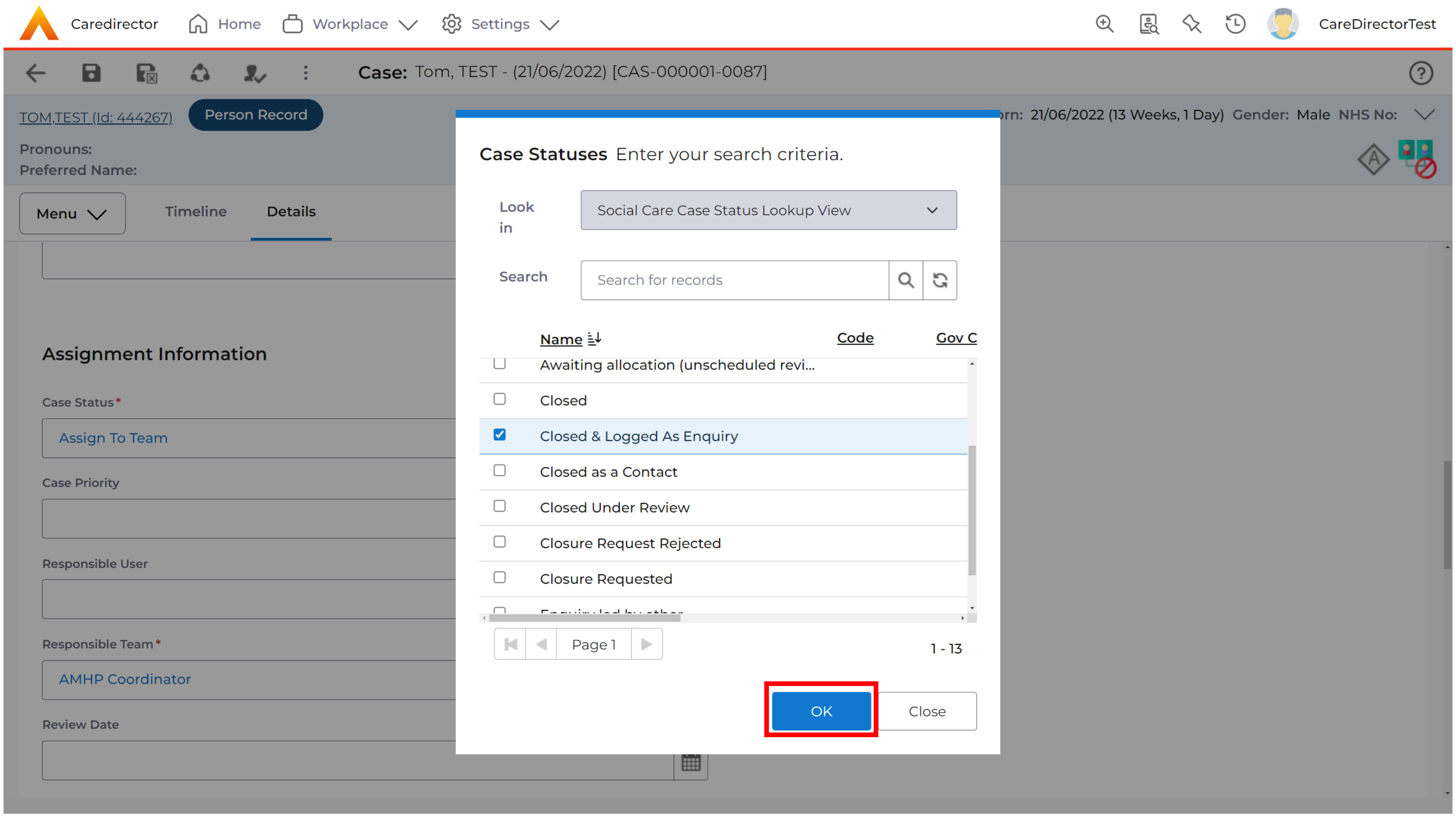
1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.



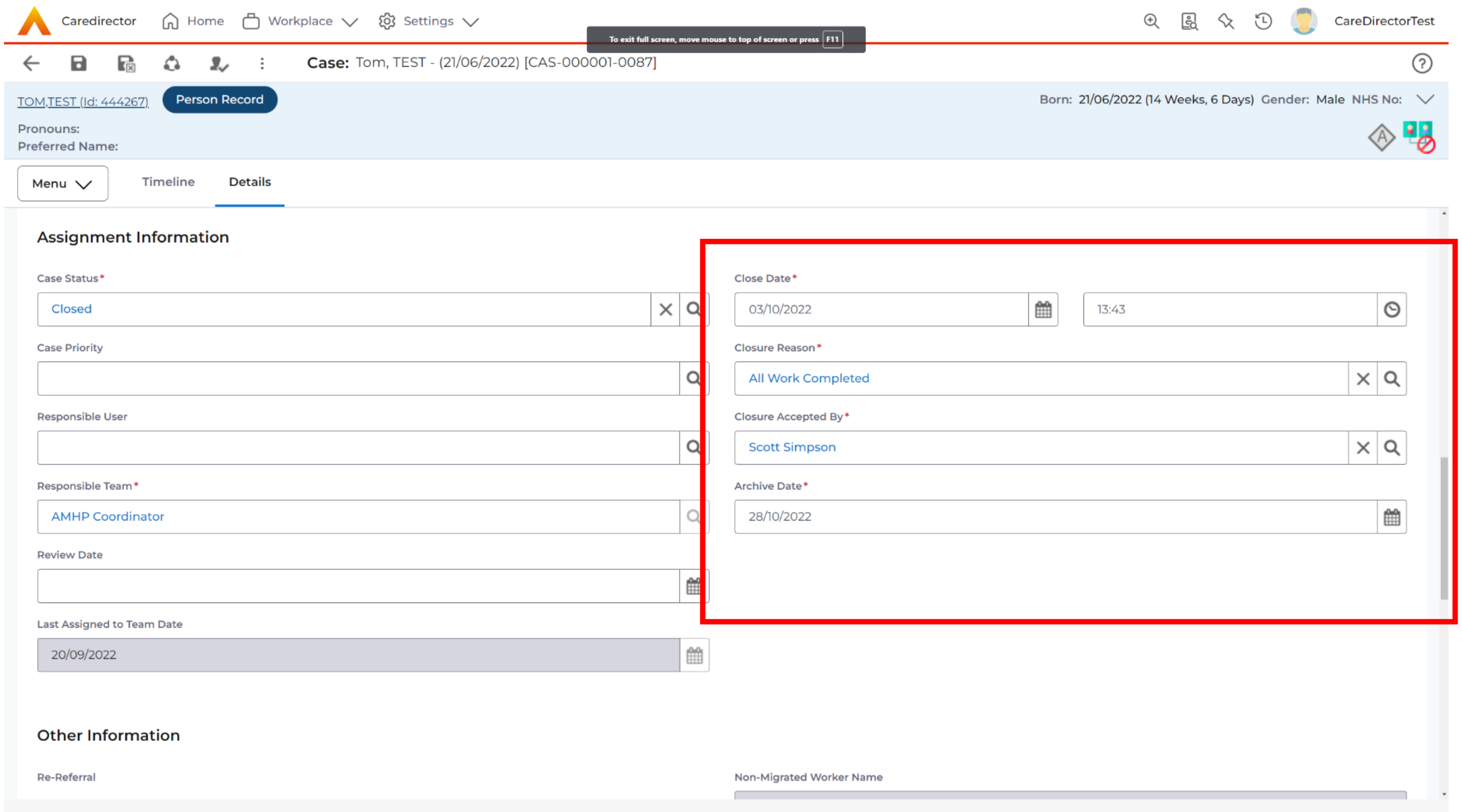
2. Select the **Lookup** function next to the **Case Status** field.



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



4. 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.**



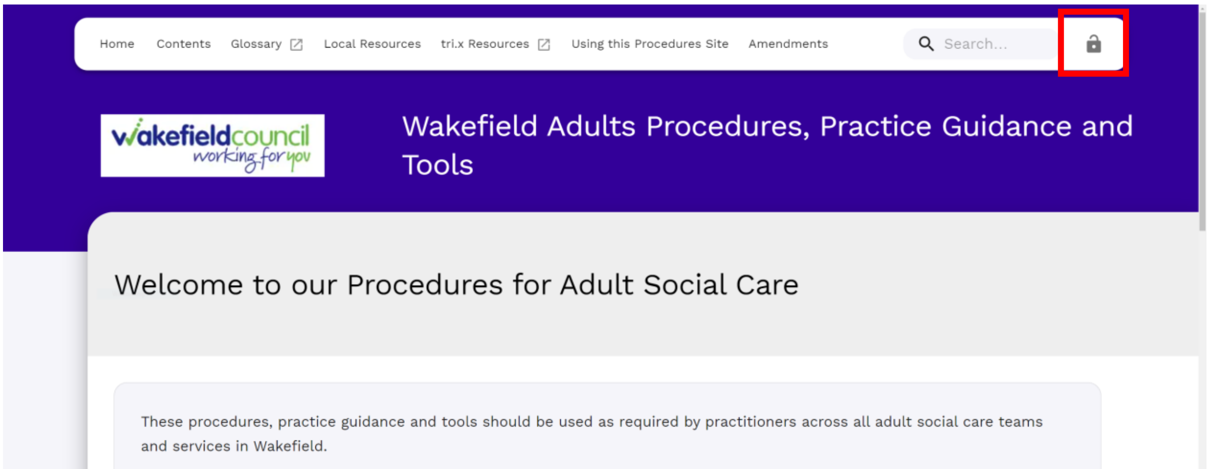
5. When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

Further CareDirector Guidance

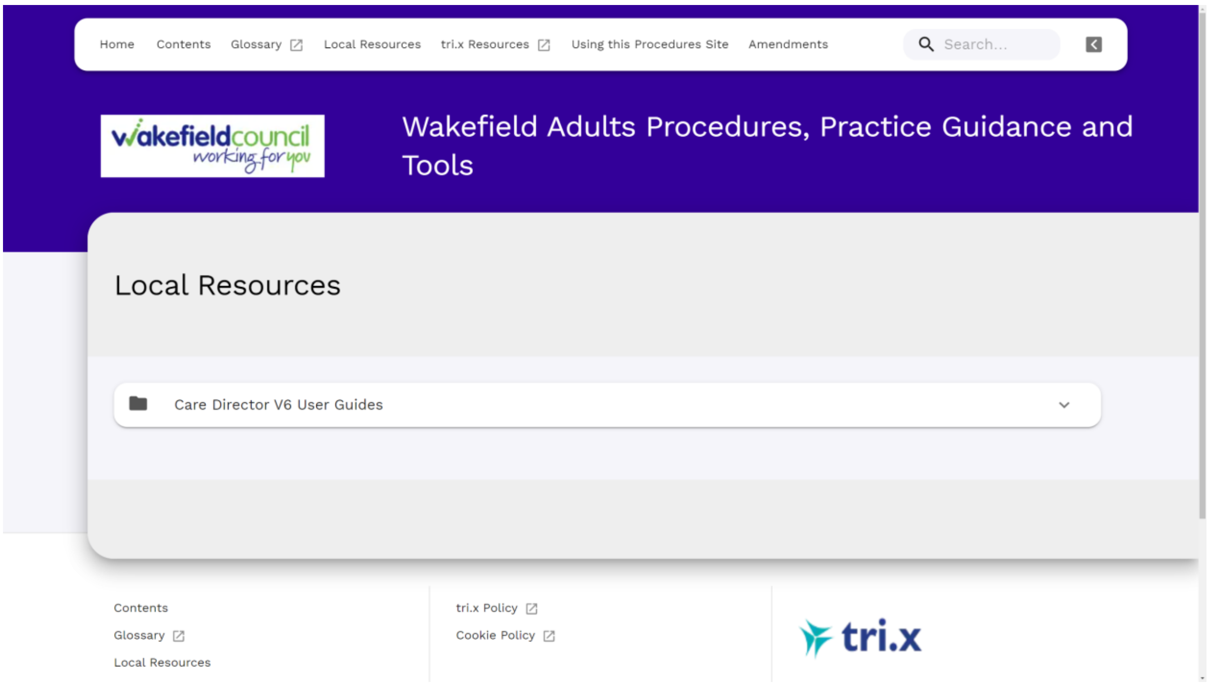
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

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