



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



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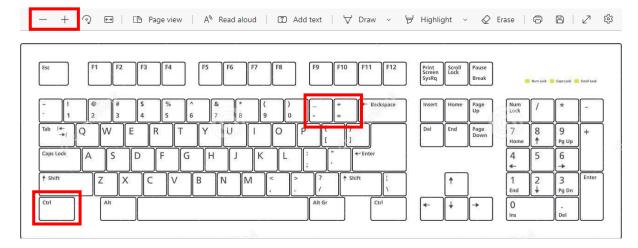
Guide Information

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.
- 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.

- + 🤉 🖽 | 🗈 Page view 🛛 A[®] Read aloud | 🗊 Add text | 🖓 Draw 🗸 😾 Highlight 🗸 🖉 Erase | 🛱 🛱 | 🖉 🕸



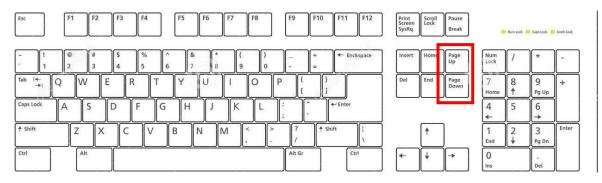
4. For auditory assistance, select Read Aloud from the toolbar.

| — 🕂 🕤 📼 🗂 Page vie | w A Read aloud | Add text | ∀ Draw ~ | Highlight | Erase | o B | 2 ∰ |
|----------------------|----------------|----------|----------|-----------|-------|-----|-----|
| | | | | P | ~ | | |

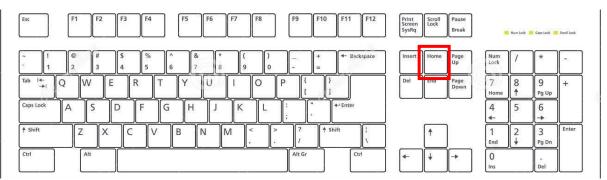
5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

| 1 of 20 Q | | - + 🤉 🖽 🗅 Page view A ^b Read aloud 🖽 Add text | \forall Draw \sim \forall Highlight \sim Q Erase \mid \ominus \mid $ _{k^{2}}$ \otimes |
|-----------|---|--|--|
| | CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING | vakefieldcouncil working for you | |
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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.



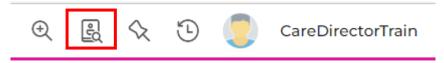
7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.





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.

| | Se | arches Bef | ore Create | Allowed | 1:1 |
|----------|---------------|------------|------------|----------|-----|
| First Na | me | | | | |
| Tom | I | | | | |
| Middle | Name | | | | |
| | | | | | |
| Last Na | me | | | | |
| Mull | enTest | | | | |
| Stated | Gender | | | | |
| | | | | ~ | |
| NHS No | | | | | |
| | | | | | |
| DOB | | | | | |
| | | | | | |
| | | | | | |
| Use | Date of Birth | Range | | | |
| Date of | Birth From | | | | |
| | | | | # | |
| Date of | Birth To | | | | |
| | | | | Ê | |

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).

| Cared G Home 🗂 Work | place 🗸 🔞 Settings | \sim | | | Ð | - | \$ D | CareDirector |
|------------------------------------|--------------------|----------------|-----------------------|---|------------|------------------|------------|---------------------------------------|
| 🔶 🖉 🌴 🔗 Person: TE | ST Tom | | | | | | | (1 |
| OM,TEST (Id: 444267) Person Record | | | | Born: 21/06 | 5/2022 (15 | Neeks, | 0 Day) Gen | der: Male NHS No: 🚿 |
| Pronouns: Preferred Name: | | | | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Summary | Profile Cases | Services | Document View | All Activities | | | | |
| Filter By | ост | 2022 | | | | | | |
| ~ | For | rm (Case) C | Created | | | | | Yesterday at 15:05 |
| From | | ew record of f | orm (case) was create | ed by Scott Simpson. | | | | |
| m | Due | Date: | | Form Type: | | Status: | | |
| То | Due | Dute. | | AMHP Report Form | | In Prog | ress | |
| m | | | sion Created | | | | | Yesterday at 10:12 |
| Team | | | | | | | | |
| Q | | ew record of s | ervice provision was | created by Scott Simpson. | | | | |
| Profession Type | Actu | al Start Date: | | Service Provided: Co-ordination Team \ SDS - WMD | | Status: Draft | | |
| ٩ | | | | Managed Account \ Home Care \ ! | | Drait | | |
| | SEP | 2022 | | | | | | |
| | Tas | k Created | | | | | | 28/09/2022 13:58:47 |
| | (🗹) | | ask was created by S | cott Simpson. | | | | |
| Reset Refresh Apply | T | | | | | | | |

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

| A Caredirector 1 Home 🖞 Workplace 🗸 🕸 Settings 🗸 | \mathbb{Q} 🛃 🛠 🕚 🌅 CareDirectorTest |
|--|---|
| 🔶 🖬 🗟 🖨 👶 : Person: TEST Tom | 0 |
| TOM,TEST (Id: 444267) Person Record | Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 💛 |
| Pronouns: Preferred Name: | le 🖓 🖷 |
| Personal Details | |
| ld* | Profile Picture |
| 444267 | 1 |
| Title | |
| First Name | |
| TEST | NH5 No. |
| Middle Name | |
| | Reason for no NHS No. |
| | Q |
| Last Name* | Ethnicity* |
| Tom | White British X Q |
| Stated Gender* | |
| Male 🗸 | Marital Status |
| | Divorced X Q |



How to add relationships

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

| Caredirector 🟠 Home 🗂 Workplace 🗸 😫 Settings 🗸 | छ 🛃 🛠 🐌 🌅 CareDirectorTest |
|---|---|
| + Person: TEST Tom | 0 |
| TOM/TEST ((d: 444267) Person Record Born: 21/06/20 | 022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred N | I I I I I I I I I I I I I I I I I I I |
| Menu A Timeline Summary Profile Cases Services Document View All Activities | |
| Activities Relationships Genogram Relationship Wizard | |
| Related Items 3 | |
| Health | |
| Mental Health Act | |
| Work and Education | |
| Other Information | |
| Finance | |
| Care Network | |
| A new record of service provision was created by Scott Simpson. | |
| | Status: Draft |
| Reset Refresh Apply | |

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

| <u> Caredirector</u> 🎧 Home 📇 Workplace 🗸 🛞 Settings 🗸 | 0् 🧕 🛠 🕐 🌅 CareDirectorTest |
|--|--|
| 🔶 🖋 🦸 Person: TEST Tom | 0 |
| TOM,TEST.(Id: 444267) Person Record | Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Timeline Summary Profile Cases Services Document View All | I Activities |
| + 💷 🎗 🗑 Person Relationship | |
| Related Records V | Search for records |
| Related Person Relationship Inside Household Family Member | Primary Carer Start Date End Date |

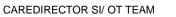
- 3. Inside this section:
 - a. The Service User will be the Primary Person.
 - b. Is a field, is what the Primary Person is to the other Service User.
 - c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on the system, they need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



CAREDIRECTOR SI/ OT TEAM

| Person Relationship: New | | | | | | | |
|--|--------|--|-------------|---------|----------|---------|---------------------------------------|
| M.TEST (Id: 444267) Person Record | | Born: 21/06/2 | 2022 (14 We | eeks, 6 | Days) Ge | nder: M | tale NHS No: |
| nouns: ferred Name: | | | | | | | A 4 |
| etails | | | | | | | * |
| | | | | | | | |
| | | | | | | | |
| Relationship to Other Person | | | | | | | |
| Primary Person* | | | | | | | |
| TEST Tom | | | | | | | XQ |
| is a * | | | | | | | |
| Brother | | | | | | | XQ |
| To* | | | | | | | × 0 |
| Tom MullenTest | | | | | | | XQ |
| | | | | | | | |
| Reciprocal Relationship | | | | | | | |
| Person | | | | | | | |
| Tom MullenTest | | | | | | | |
| s a* | | | | | | | |
| Brother | | | | | | | ×c |
| ĩo là chiến | | | | | | | |
| | | | | | | | |
| | | Responsible Team* | | | | | × |
| Relationship Details _{Start Date} * | | | | | | | ×Q |
| Relationship Details _{Start Date} * | | | | | | | ×C |
| Relationship Details Start Date* 03/10/2022 End Date | | | | | | | × 0 |
| Relationship Details itart Date* 03/10/2022 ind Date | | | | | | | ×c |
| Relationship Details itart Date* 03/10/2022 ind Date | | | | | | | ×C |
| Relationship Details itart Date* 03/10/2022 ind Date | | | | | | | ×c |
| Relationship Details Natr Date* 03/10/2022 ind Date Description | | | | | | | ×c |
| Relationship Details Start Date* O3/10/2022 Ind Date Description Nature of Relationship to Primary Person | | CareDirectorTest | | _ | | | × c |
| Relationship Details tart Date* 03/10/2022 ind Date Description Nature of Relationship to Primary Person | | | | | | | |
| Relationship Details tart Date* O3/10/2022 ind Date Description Nature of Relationship to Primary Person nside Household | | CareDirectorTest Primary Carer | | | | | |
| Relationship Details tart Date* O3/10/2022 ind Date Description Nature of Relationship to Primary Person nside Household | × | CareDirectorTest | | | | | ~ |
| Relationship Details tart Date O3/10/2022 Ind Date Description Nature of Relationship to Primary Person nside Household amily Member | | CareDirectorTest Primary Carer | | | | | ~ |
| Relationship Details Start Date * O3/10/2022 Ind Date Description Nature of Relationship to Primary Person Inside Household Stamily Member | × | CareDirectorTest Primary Carer | 5 | | | | |
| Relationship Details tart Date O3/0/2022 ind Date Description Nature of Relationship to Primary Person nside Household amily Member text of Kin | × | CareDirectorTest Primary Carer | 5 | | | | ~ |
| Relationship Details Xart Date * O3/0/2022 ind Date Description Nature of Relationship to Primary Person nside Household Tamily Member Next of Kin | × × | CareDirectorTest Primary Carer | 5 | | | | · · · · · · · · · · · · · · · · · · · |
| Relationship Details Start Date * O3/0/2022 Ind Date Description Nature of Relationship to Primary Person Inside Household Family Member Start of Kin Emergency Contact | × | CareDirectorTest Primary Carer | | | | | · · · · · · · · · · · · · · · · · · · |
| Relationship Details Start Date * O3/0/2022 Ind Date Description Nature of Relationship to Primary Person Inside Household Family Member Start of Kin Emergency Contact | × × | CareDirectorTest Primary Carer | 5 | | | | · · · · · · · · · · · · · · · · · · · |
| Relationship Details Start Date * 03/0/2022 End Date Description Nature of Relationship to Primary Person Inside Household Family Member Next of Kin Emergency Contact Key Helder | × | CareDirectorTest Primary Carer | 5 | | | | · · · · · · · · · · · · · · · · · · · |
| Relationship Details Start Date * O370/2022 End Date Description Start of Relationship to Primary Person Inside Household Family Member Start of Kin Emergency Contact Emergency Contact Exercise Start Star | | CareDirectorTest Primary Carer | | | | | |
| Relationship Details Start Date* 03/0/2022 End Date Description Nature of Relationship to Primary Person Inside Household Family Member Next of Kin Emergency Contact Key Holder Advocate | × | CareDirectorTest Primary Carer | 5 5 | | | | · · · · · · · · · · · · · · · · · · · |
| Relationship Details Start Date * 03/0/2022 End Date Description Nature of Relationship to Primary Person Inside Household Family Member Next of Kin Emergency Contact Key Helder | | CareDirectorTest Primary Carer | | | | | |
| Relationship Details Start Date* 03/0/2022 End Date Description Nature of Relationship to Primary Person Inside Household Family Member Next of Kin Emergency Contact Key Holder Advocate | | CareDirectorTest Primary Carer | *s | | | | · · · · · · · · · · · · · · · · · · · |

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





How to Enter Date of Death

| Caredirector | G Home | 💾 Workp | lace 🗸 | ලි Settings | \sim | ⊕ <u>E</u> | \$ D | CareD | irector |
|------------------------------|-----------|-------------|-----------------------|-------------------------|---------------|----------------------------|-----------------------|--------------------------------------|---------|
| < /1 | 0 F | Person: Tes | t Tom | | | | | | ? |
| TOM,Test (Id: 446229) | Person Re | ecord | | | Borr | : 03/05/1996 (26 Yea | rs) Gender: I | Male NHS No: | \sim |
| Pronouns: Preferred Name: | | | | | | | | $\langle \! \! \wedge \! \! \rangle$ | 0 |
| Menu 🗸 | Timeline | Summary | Profile | Cases | Services | Document View | All Activi | ties | |
| Filter By | <u> </u> | | | Case) Cre | | eated by Scott Simp | ison. | Yesterday at 11:1 | 12 |
| То | < | | Due Date 20/11/202 | | Form DoLS | Type: Tracker - Cat 2 | Status: In Progres | 55 | |
| Reset Refres | sh | | | reated ecord of task | was created I | by Scott Simpson. | | Yesterday at 11:0 | 8 |

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.**

| Caredirector | Home Home | 💾 Work | place 🗸 | 😥 Setting | gs 🗸 | Ð | EQ (| \$ D | CareDirector |
|--|------------|--------|---------|-----------|----------------|--------------|----------|------------|----------------|
| \leftarrow B F | • | : | Person: | Test Tom | | | | | ? |
| <u>TOM,Test (Id: 446229)</u> Pronouns: Preferred Name: | Person Rec | cord | | | Born | : 03/05/1996 | (26 Year | s) Gender: | Male NHS No: 🗸 |
| Death Informat | ion | | | | | | | | |
| Deceased | | | | | Cause of Death | | | | |
| • Yes | | | | | | | | | Q |
| O No | | | | | Place of Death | | | | |
| Date of Death | | | | | | | | | |
| | | | | | [| | | | |

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**.

| Caredirector 🞧 Hor | me 📋 Workplace 🗸 | 😥 Settings 🗸 | (| € 🛃 🛠 🖱 | CareDirectorTest |
|---|------------------|-----------------------------------|---|-------------------------|--------------------|
| < 1 4 0 | Person: TEST Tom | 1 | | | ? |
| TOM.TEST (ld: 444267) Pronouns: Preferred Name: | on Record | | Born: 21/06/2022 (| (15 Weeks, 0 Day) Gende | er: Male NHS No: 🗸 |
| Menu V Timeline | Summary Profile | Cases Services Docur | nent View All Activities | | |
| Filter By | | DCT 2022 | | | ĺ |
| From | | Form (Case) Created | reated by Scott Simpson. | | Yesterday at 15:05 |
| То | | Due Date: | Form Type: AMHP Report Form | Status: In Progress | |
| Team | | Service Provision Created | | | Yesterday at 10:12 |
| | Q 7 | A new record of service provision | was created by Scott Simpson . | | |
| Profession Type | Q | Actual Start Date: | Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot | Status: Draft | |
| Reset Refresh A | pply | | | | |

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

| 人 Caredirector 🔓 Home 🗂 Workplace 🗸 | ôð Settings 🗸 | | | Q B & C |) | rTest |
|--|---------------------|------------------------|-----------------|------------------------------|---------------------|--------|
| 🔶 🖋 🐐 🤗 🏾 Person: TEST Tom | | | | | | ? |
| TOM,TEST (Id: 444267) Person Record | | | Born: 21/ | 06/2022 (14 Weeks, 6 Days) G | ender: Male NHS No: | \sim |
| Pronouns: Preferred Name: | 1 | | | | | 0 |
| Menu Timeline Summary Profile + Image: Image | Cases Services | Document View All Ac | tivities | | | |
| Related Records ~ | | Search for re | cords | | ۵ | 3 |
| □ <u>Responsible Team</u> <u>Responsible User</u> ±↓ | Case Date/Time | Contact Reason | Case No | Presenting Priority | Case Status | Cr |
| CareDirector Support | 21/06/2022 07:00:00 | A - Adult Safeguarding | CAS-000001-0010 | | Assign To Team | Sc |
| | 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**.

| Caredirector 🎧 Home 🗂 Workplace 🗸 | 鑁 Settings 🗸 | | | 0. E. & | 🕑 🌅 CareDire | ctorTest |
|---|---------------------|-------------------------|-----------------|-----------------------------|---------------------|----------------|
| 🔶 🖌 🐓 🤗 Person: Tom Mullen | ēst | | | | | 0 |
| MULLENTEST,Tom.(Id: 444264) Person Record | | | | Born: 03/05/1955 (67 Years) | Gender: Male NHS No | . ~ |
| Pronouns: Preferred Name: | | | | | I 🖓 🕙 | 2 |
| M2 Timeline Summary Profile | Cases Services | Document View All Act | tivities | | | |
| 🕇 🕼 🌮 🎝 📌 🗄 Cases | | | | | | |
| Related Records ~ | | Search for re | ecords | | Q | S |
| <u>Responsible Team</u> <u>Responsible User</u> | Case Date/Time | Contact Reason | Case No | Presenting Priority | Case Status | <u>Creat</u> e |
| CareDirectorTest | 24/06/2022 08:50:00 | A - Assessment of needs | CAS-000001-0019 | | Assign To Team | TEST (|
| 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**.

| Caredian 🔓 🔓 | iome 📩 Workplace | \sim | ැලි Settin | ngs 🗸 | | | | € | ł | \Diamond | € | | CareD | irectorTes |
|----------------------------|-------------------|--------|------------|-------|---|---|------------------------|-----------|----------|------------|--------|---------|---------|------------|
| 🗧 🖬 🗟 Ca | se: New | | | | | | | | | | | | | ? |
| ULLENTEST,Tom (Id: 444264 | 👔 👻 🛛 Person Reco | ord | | | | | Borr | n: 03/05, | /1955 (6 | 7 Years | ;) Ger | nder: M | lale NH | S No: 🗸 |
| onouns: referred Name: | | | | | | | | | | | | Â | > 🌄 | R . |
| Details | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Contact Details | | | | | | | | | | | | | | |
| Case No* | | | | | | | Contact Received By* | | | | | | | |
| | | | | | | | Scott Simpson | | | | | | × | Q |
| Person* | | | | | | | Contact Reason* | | | | | | | |
| Tom MullenTest | | | | | × | Q | A - Adult Safeguarding | | | | | | × | Q |
| Case Date/Time* | | | | | | | Presenting Priority | | | | | | | |
| 07/10/2022 | | 09:0 | 00 | | | Θ | | | | | | | | Q |
| Initial Contact | | | | | | | Additional Information | | | | | | | |
| | | | | | | Q | | | | | | | | |
| Date/Time Contact Received | | | | | | | | | | | | | | |
| 06/10/2022 | ** | 11:00 | 0 | | | Θ | 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**.

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 | 👸 Settings 🗸 | | | 0 I | CareDirectorTest |
|-------------------------------------|---------------------|------------------------|-----------------|-------------------------------|----------------------|
| 🔶 🖋 🦸 🤗 Person: TEST Tom | | | | | (?) |
| TOM,TEST (Id: 444267) Person Record | | | Born: 21/0 | 06/2022 (14 Weeks, 6 Days) Ge | nder: Male NHS No: ∨ |
| Pronouns: Preferred Name: | 1 | | | | I |
| Menu V Timeline Summary Profile | Cases Services | Document View All Ac | tivities | | |
| + 🕮 🕸 🎝 🏚 : Cases | | | | | |
| Related Records | | Search for re | cords | | Q 3 |
| Responsible Team Responsible User | Case Date/Time | Contact Reason | Case No | Presenting Priority | Case Status Crea |
| 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.

| 人 Caredirector 🔓 Home 🗂 Workplace 🗸 🕸 Settings 🗸 | | छ् 🧕 🛠 🔁 🌷 CareDirectorTest |
|--|--------|--|
| 🔶 🖬 🔞 🎝 🛃 : Case: Tom, TEST - (21/06/2022) [CA | S-0000 | 001-0087] |
| TOM,TEST (ld: 444267) Person Record | | Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 💛 |
| Pronouns: Preferred Name: | | In the second se |
| Menu V Timeline Details | | |
| Assignment Information | | 2 |
| Case Status* | | |
| Assign To Team | ×Q | 2 |
| Case Priority | | |
| | 0 | 2 |
| Responsible User | | _ |
| | C | A Contraction of the second seco |
| Responsible Team * | | _ |
| AMHP Coordinator | 0 | |
| Review Date | | _ |
| | Ê | |
| Last Assigned to Team Date | | |
| 20/09/2022 | Ű | |
| | | |



How to change the Case Status

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

| 🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🔅 Settings 🗸 | @ 🧕 🛠 🔁 🌅 CareDirectorTest |
|--|--|
| 🔶 🖬 🕼 🔕 🎣 : Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] | 0 |
| OM,TEST (Id: 444267) Person Record | Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸 |
| ronouns: referred Name: | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | |
| Assignment Information | |
| Case Status* | |
| Assign To Team | |
| Case Priority | |
| ٩ | |
| Responsible User | |
| ٩ | |
| Responsible Team* | |
| AMHP Coordinator Q | |
| Review Date | |
| m | |
| Last Assigned to Team Date | |
| 20/09/2022 | |

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

| Caredirector 🎧 Home 🗂 Workpla | ce 🗸 🔞 Settings 🗸 | | 🍳 🛃 🏡 🖸 🌅 CareDirectorTest |
|-------------------------------|--|------------|---|
| ← 🖬 🖬 🎝 🎝 ፡ 🤇 | | | ? |
| MULLENTEST.Tom (ld: 444264) Y | Case Statuses Enter your search criteria | а. | 3/05/1955 (67 Years) Gender: Male NHS No: 📏 |
| Pronouns: Preferred Name: | Look Social Care Case Status Lookup V | iew 🗸 | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | Search Search for records | Q 3 | |
| Case Status* | | Code Gov C | |
| Assign To Team | Allocated | 200013 | |
| Case Priority | Assign To Team | 200014 | |
| | Assigned to Team (unscheduled revie | | |
| Responsible User | Awaiting Allocation | 200012 | |
| | Awaiting allocation (unscheduled revi | - | |
| Responsible Team* | Page 1 | 1 - 13 | |
| CareDirectorTest | | | |
| Review Date | ок | Close | |
| | (iii) | | |
| Last Assigned to Team Date | | | |



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.

| 🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸 | र् 🛃 🛠 🕑 🌅 CareDirectorTest |
|--|--|
| ← 🖬 🗟 & I ← i Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019] | (?) |
| MULLENTEST.Tom (ld: 444264) V Person Record | Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | I 🖓 🔧 🖄 🖉 |
| Menu V Timeline Details | |
| | |
| Assignment Information | |
| Case Status* | |
| Assign To Team X Q | |
| | |
| ٩ | |
| Responsible User | |
| ٩ | |
| Responsible Team * | |
| CareDirectorTest Q | |

- 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**.

| Case Status* | | |
|--|--|--|
| Assign To Team | | ×Q |
| 🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🔞 Settin | ngs 🗸 | ९ द्वि 🛠 🕲 🌷 CareDirectorTest |
| ← 🖬 🗟 🎝 L→ i Case: MullenTest, | Tom - (03/05/1955) [CAS-000001-0019] | 0 |
| MULLENTEST.Tom (ld: 444264) Person Record | | Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | Case Statuses Enter your search criteria. | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | Look Social Care Case Status Lookup View V | |
| Assignment Information | Search for records Q Q | |
| Case Status* | Name 14 Code G | |
| Assign To Team | Allocated 200013 | |
| Case Priority | Assign To Team 200014 | |
| | Assigned to Team (unscheduled revie | |
| Responsible User | Awaiting Allocation 200012 | |
| | Awaiting allocation (unscheduled revi | |
| Responsible Team* | Closed | |
| CareDirectorTest | Closed & Logged As Enquiry | |
| Review Date | H ≪ Page1 ► 2 1-19 | |
| | | |
| Last Assigned to Team Date | OK Close | |
| 24/06/2022 | | |

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**.

| Responsible User* | | Q |
|--|---|--|
| 💊 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settin | igs 🗸 | 🔍 🛃 🍕 🕑 🌅 CareDirectorTe |
| - B 🗟 🌢 🎝 : Case: MullenTest, | Tom - (03/05/1955) [CAS-000001-0019] | C |
| ULLENTESTTom (kt. 444264) Person Record onouns: eferred Name: | | Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🔌 |
| Menu V Timeline Details | System Users Enter your search criteria. Look In System Views Active Managers Search Descritated Users | |
| Case Status* Allocated | Leackup View My Business Unit Users My Default Team Nat 5 My Record | |
| Case Priority | CareLivelFD Wakefield CareDirectorTest CareLiveInstall CareWo CareDirectorTest | |
| Responsible User* | CareLiveInternal Wake 2 CareDirectorTest | |
| | CareLiveMigration Was CareDirectorTest | |
| Responsible Team* | CareLivePlugin Wakefie CareDirectorTest | |
| CareDirectorTest | CareLivePowerusr Wak CareDirectorTest | |
| Review Date | CareTestIFD Account CareDirectorTest | |
| Last Assigned to Team Date | | |
| 24/06/2022 | OK Close | |

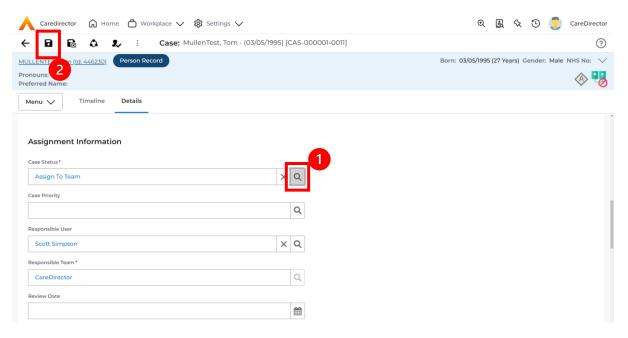
6. When a **Responsible User** has been chosen, select **Save** from the toolbar. This will send the **Case** to their **Dashboard** and **System Views**.

| Caredirector 🟠 Home 📥 Workplace 🗸 🕸 Settings 🗸 | 🔍 🛃 🛠 🕑 킻 CareDirectorTest |
|--|--|
| ← 🖪 📓 🌣 L : Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019] | (?) |
| MULLENTE 1 1: 444264) V Person Record | Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | I 🕾 🕾 😒 |
| Menu V Timeline Details | |
| Assignment Information Case Status* Allocated Case Priority Q | |
| Responsible User* | |
| Scott Simpson X Q | |
| Responsible Team * | |
| CareDirectorTest | |
| Review Date | |
| m | |



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.

| Caredirector ⋒ Home 1 rkplace ∨ ₿ Settings ∨ | | ⊕ [| | € | | CareDirector |
|--|------------|----------|----------|--------|--------|--------------|
| ← 🖬 🗟 🎝 : Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | | | | | | ? |
| MULLENTEST.Tom (Id: 446230) Person Record Bo | rn: 03/05/ | 1995 (27 | ' Years) | Gender | : Male | NHS No: 🗸 |
| Pronouns: Preferred Name: | | | | | | le 😽 |
| Menu V Timeline Details | | | | | | |
| Assignment Information | | | | | | |
| Case Status* | | | | | | |
| Assign To Team X Q | | | | | | |
| Case Priority | | | | | | |
| ٩ | | | | | | |
| Responsible User | | | | | | _ |
| ٩ | | | | | | |
| Responsible Team * | | | | | | |
| CareDirector | | | | | | |



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

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 | 🔞 Settings 🗸 | 0 🛃 🛠 🕑 🌅 CareDirector |
|---|---|--|
| 🔶 🖻 🗟 🔕 🎝 E Case: M | ullenTest, Tom - (03/05/1995) [CAS-000001-0011] | 0 |
| MULLENTEST,Tom (ld: 446230) Person Record | Assign | Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | 1 | la 🖓 📆 |
| Menu V Timeline Details | Responsible Team • | |
| Assignment Information | Responsible User Decision* | |
| Case Status* | ~ | |
| Assign To Team | Include Inactive? | |
| Case Priority | Related Records to Include | |
| | Check/Uncheck All | |
| Responsible User | Adult Safeguarding | |
| | Adult Safeguarding Primary Reason History | |
| Responsible Team* | Adult Safeguarding Secondary Reason | |
| CareDirector | Adult Safeguarding Status History | |
| Review Date | □ Note | |
| | Task | |
| Last Assigned to Team Date | | |
| 21/10/2022 | OK Close | |
| | | |

 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.

| \rm Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 | Settings 🗸 | | 0 🛃 🛠 讫 킻 CareDirector |
|---|---|-------------------|--|
| 🔶 🖬 🕼 🔕 🎝 : Case: Mulle | nTest, Tom - (03/05/1995) [CAS-000001-0011 | 1 | 0 |
| MULLENTEST.Tom (ld: 446230) Person Record Pronouns: Preferred Name: Menu Timeline Details Assignment Information | Look My Teams in System Views Lookup View MyTeams Search MyTeams Reference Data Owner Teams | 1 ~ ms | Born: 03/05/1995 (27 Years) Cender: Male NHS No: 🗸 |
| Case Status* | <u>Name</u> ≟↓ | Business Unit | |
| Assign To Team | Adults Connecting Care Team West | Adult Services | |
| Case Priority | AMHP rota | Adult Services | |
| | CareDirector | CareDirector | |
| Responsible User | Sensory Impairment Team | Adult Services | |
| Responsible Team * | | | |
| CareDirector | | | |
| Review Date | M 🛛 Page 1 🕨 | 2 1-4 ОК Close | |
| Last Assigned to Team Date | | | |
| 21/10/2022 | ** | | |
| | | | |



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.**

| Caredirector 🎧 Home 🖨 Workplace 🗸 | 🔞 Settings 🗸 | 🍳 🛃 🍾 边 🌅 CareDirector |
|---|--|--|
| 🔶 🖬 🕼 🗘 🎝 🛛 Case: M | ullenTest, Tom - (03/05/1995) [CAS-000001-0011] | 3 |
| MULLENTEST.Tom (Id: 446230) Person Record Pronouns: Preferred Name: | Assign | Born: 03/05/1995 (27 Years) Gender: Male NHS No: V |
| Menu V Timeline Details | Responsible Team * | V 0 |
| Assignment Information | Responsible User Decision * | |
| Case Status* | Do not change 🗸 🗸 🗸 | |
| Assign To Team | Include Inactive? | |
| Case Priority | Related Records to Include | |
| | Check/Uncheck All | |
| Responsible User | Adult Safeguarding Adult Safeguarding Primary Reason History | |
| Responsible Team * | Adult Safeguarding Secondary Reason | |
| CareDirector | Adult Safeguarding Status History | |
| Review Date | Note - | |
| | OK Close | |
| Last Assigned to Team Date | | |
| 21/10/2022 | ** | |
| | | |

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).**

| | | | | | | - |
|---------------------------------|-------------------------|--|-------------------------|-------------------------|---------------------------------|----------------------------|
| - : Case: Test, | Jayne - (06/06/1996) [0 | AS-000001-0188] | | | | C |
| <u>ST,Jayne (Id: 400004)</u> Pe | rson Record | | | Born: 06/06/1996 (26 Ye | ears) Gender: Female Ni | HS No: 777 080 6534 |
| onouns: She/Upr | | | | | | 🧶 🔮 🙆 🔮 |
| Menu 🔨 Timeline | Details | | | | | |
| Activities 2 | lè: | ٨ | Ø | Ē | Ē | Q |
| Related Items | Actions 3 | Adult Safeguarding | Attachments | Audit | Conferences/Meetings | Deprivations Of Liberty |
| | È | 36 | | ** | Ċ | |
| Other Information | Forms (Case) | Involvements | Involvements History | Joint Case Members | Status History | |
| Team | | Task Created | | | | 16/11/2022 10:50:39 |
| | | A new record of t | ask was created by T | est Pe. | | |
| Profession Type | ٩ | Responsible Team: Co-ordination Tea | | Responsible User: | Subject: Service Cha Test | nge Request Jayne |
| | | Form (Case) I | | | | 16/11/2022 10:49:49 |

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

Form Type*

| Occupational Therapy Referral (Secondary Allocation) | \times | Q | |
|--|----------|---|--|
| | | | |

| Form | Type* |
|------|-------|
|------|-------|

| Sensory Impairment Referral (Secondary Allocation) | × | Q | |
|--|---|---|--|
|--|---|---|--|

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

| 人 Caredirector 🎧 Home 📥 Workplace 🗸 🐯 Settings 🗸 | ् 🧕 🛠 🕑 🌅 CareDirectorTest |
|--|--|
| ← 🖬 🔯 & ♣ : Case: Tom, TEST - (21/06/2022 |) [CAS-000001-0010] |
| TOM,TEST (Id: 444267) Y Person Record | Born: 21/06/2022 (20 Weeks, 4 Days) Gender: Male NHS No: 💛 |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | - |
| Contact Details | |
| Case No* | Contact Received By* |
| CAS-000001-0010 | Scott Simpson Q |
| Person* | Contact Reason* |
| TEST Tom C | A - Adult Safeguarding Q |
| Case Date/Time* | Presenting Priority |
| 21/06/2022 | Q |
| Initial Contact | Additional Information |
| C | |
| Date/Time Contact Received • | |
| | Referral Reason - |

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

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

| Caredirector 🞧 Home (| 🗂 Workplace 🗸 | 😥 Settings 🗸 | 🔍 🛃 🛠 🖱 🌅 CareDirectorTest |
|--------------------------------|------------------|--------------------------|--|
| ← B B₂ ♪ ₽⁄ | : 1 ase: Tor | m, TEST - (21/06/2022) [| [CAS-000001-0010] |
| TOM,TEST (Id: 444267) V Persor | Correct Errors | | Born: 21/06/2022 (20 Weeks, 4 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | Pin to me | | I I I I I I I I I I I I I I I I I I I |
| Menu 🗸 Timeline De | Unpin from me | | |
| | Pin to another | | |
| | Sync with PDS | 2 | |
| Contact Details | Clone | | |
| Case No* | Restrict Access | | Contact Received By* |
| CAS-000001-0010 | Delete | | Scott Simpson Q |
| Person* | Run Workflow | | Contact Reason* |
| TEST Tom | Copy Record Link | Q | A - Adult Safeguarding Q |
| Case Date/Time* | | | Presenting Priority |
| 21/06/2022 | 07:00 | Ø | ٩ |
| Initial Contact | | | Additional Information |
| | | Q | |
| Date/Time Contact Received * | | | |
| scriptvoid(0); | | | Referral Reason |



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 Cas | e 1 | | | |
|-------------------------|------------------------|------------------|---------------|---------------|----------------|
| Start Date/ 12/11/20 | Time for Cloned Cases* | m | | | Relat Broth |
| 2 | Person Id | <u>Person</u> ≟↓ | Date of Birth | <u>Gender</u> | Relat |
| | 444264 | Tom MullenTest | 03/05/1955 | Male | Broth |
| K | Page 1 | | | | , 1-1 |
| | | | | 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.

| am a | Activities My activities Team c | ases (all teams) S | ervice provisions | Dashboards | | | | |
|------|-----------------------------------|--------------------|-------------------|------------|---------------------|---------------------|-------------------------|------------|
| Му А | ctive Tasks/Notes | | | | | | | |
| + | a 2, T | | | | | | | |
| | Subject | Regarding | <u>Priority</u> | Event Date | Due | Created On | Created By | Modified |
| | Case has been allocated | Tom, Test - (03/0 | | | 31/10/2022 10:40: | 31/10/2022 10:40: | Scott Simpson | 31/10/2022 |
| | 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 |
| | Case has been allocated | Test, Jayne - (06/ | | | 28/10/2022 14:58: | 28/10/2022 14:58: | Scott Simpson | 28/10/202 |
| | New Occupational Therapy Referral | Occupational Th | | | 19/10/2022 00:00: | 19/10/2022 11:39:09 | Test Adults Triage User | 28/10/202 |
| | Case has been allocated | Test, Jayne - (06/ | | | 28/10/2022 13:51:28 | 28/10/2022 13:51:31 | Jayne Mullen | 28/10/2022 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| M | Page1 | | | | | | | 1- |
| му А | Active Case Notes | | | | | | | |
| + | QU 2, W | | | | | | | |
| | Subject | Person | Priority | Event Date | Date | Created On | Created By | Modified |
| | | | | | | | | |

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

| 140 | Person: Tes | t Tom | | | | | | (? |
|------------------------------|-------------|--------|-------------------|------------------|-----------|------------|------------------------------------|-------------------|
| 4,Test (Id: 446229) Person R | lecord | | | | | | Born: 03/05/1996 (26 Years) Gender | r: Male NHS No: 🚿 |
| nouns: ferred Name: | | | | | | 1 | | 🚸 🍕 |
| fenu 🗸 Timeline | Summary | Profil | e Cases Se | rvices Documen | t View Al | Activities | | |
| 🖨 🗗 All Acti | ivities | | | | | | | |
| Keyword | | Ō | Regarding | <u>Subject</u> | Activity | Status | Start/Due Date Actual End | Case Note |
| | | | Test Tom | Case | Task | Open | 03/11/2022 14:00: | No |
| Activity Type | | | Tom, Test - (03/0 | Case has been al | Task | Open | 31/10/2022 10:40: | Yes |
| All | ~ | | Tom, Test - (03/0 | Case has been al | Task | Open | 31/10/2022 10:29:11 | Yes |
| Date Type | | 0 | Test Tom | Date of Death E | Task | Open | 26/10/2022 13:44: | Yes |
| Created Date | ~ | | Test Tom \ Willia | Booking request | Task | Open | 21/10/2022 15:37:26 | Yes |
| Cleated Date | • | | Test Tom \ THE L | Service provisio | Task | Open | 21/10/2022 01:00: | Yes |
| From | | < | | | | | | |
| 02/10/2022 | Ê | Γ., | | | | | | |
| Го | | | | | | | | |
| 01/11/2022 | Ê | | | | | | | |
| Actual End (From) | | | | | | | | |
| | Ê | | | | | | | |



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 Ø P | erson: Tes | t Tom | | | | | | (|
|-------------------------------|------------|--------|-------------------|------------------|--------------|------------|------------------------------------|----------------|
| M,Test (ld: 446229) Person Re | cord | | | | | | Born: 03/05/1996 (26 Years) Gender | : Male NHS No: |
| phouns: eferred Name: | | | | | | | | A 🔁 |
| Menu 🗸 Timeline | Summary | Profil | e Cases Se | rvices Documen | t View All A | Activities | | |
| All Activ | vities | | | | | | | |
| Keyword | | | Regarding | Subject | Activity | Status | Start/Due Date Actual End | Case Note |
| | | | Test Tom | Case | Task | Open | 03/11/2022 14:00: | No |
| Activity Type | | | Tom, Test - (03/0 | Case has been al | Task | Open | 31/10/2022 10:40: | Yes |
| All | ~ | | Tom, Test - (03/0 | Case has been al | Task | Open | 31/10/2022 10:29:11 | Yes |
| Date Type | | | Test Tom | Date of Death E | Task | Open | 26/10/2022 13:44: | Yes |
| Created Date | ~ | | Test Tom \ Willia | Booking request | Task | Open | 21/10/2022 15:37:26 | Yes |
| Cleated Date | | | Test Tom \ THE L | Service provisio | Task | Open | 21/10/2022 01:00: | Yes |
| From | | c | | | | | | |
| | 雦 | 1 | | | | | | |
| То | | | | | | | | |
| 01/11/2022 | Ê | | | | | | | |
| Actual End (From) | | | | | | | | |
| | 雦 | | | | | | | |
| | | * | | | | | | |

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

| Caredirector 🞧 Home | 🖰 Workp | lace 🝾 | / 🔅 Settings 🗸 | | | | C 🖳 🛠 🖸 | CareDirec |
|--|------------|--------|-------------------|------------------|------------|------------|-------------------------------------|----------------|
| - 🖍 🖣 🔗 Pe | erson: Tes | t Tom | | | | | | (|
| M.Test (Id: 446229) Person Reconnuns: eferred Name: | cord | | | | | | Born: 03/05/1996 (26 Years) Gender: | Male NHS No: 🚿 |
| Menu 🗸 Timeline S | ummary | Profi | le Cases Ser | vices Documen | t View All | Activities | | |
| all Activ | ities | | | | | | | |
| Keyword | | | Regarding | Subject | Activity | Status | Start/Due Date Actual End | Case Note |
| | | | Test Tom | Case | Task | Open | 03/11/2022 14:00: | No |
| Activity Type | | | Tom, Test - (03/0 | Case has been al | Task | Open | 31/10/2022 10:40: | Yes |
| All | ~ | | 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 |
| Date Type | | | Test Tom \ Willia | Booking request | Task | Open | 21/10/2022 15:37:26 | Yes |
| Created Date | ~ | | Test Tom \ THE L | Service provisio | Task | Open | 21/10/2022 01:00: | Yes |
| From | | c . | | | | | | |
| | # | | | | | | | |
| То | | | | | | | | |
| 01/11/2022 | | | | | | | | |
| Actual End (From) | | | | | | | | |
| | Ê | | | | | | | |
| Clear Filters Search | | | | | | | | |



How to input an Activity

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

| Caredirector 🞧 Ho | me 🗂 Workplace 🗸 | () Settings | | | | € 🛃 🛠 | CareDirectorTest |
|------------------------------------|------------------|----------------------------------|---------------------|---------|------------------|----------------------|---------------------------------------|
| | 🎝 : Case: | Tom, TEST - (21/06/20 | 22) [CAS-000001-008 | 37] | | | 0 |
| TOM,TEST (Id: 444267) Perso | on Record | | | | Born: 21/06/202 | 2 (14 Weeks, 6 Days) | Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Na | | | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu A Timeline | Details | | | | | | |
| Activities | Appointments | Case Notes | (©) Emails | Letters | Q Phone Calls | S Tasks | |
| Related Items Other Information | | | | | | | |
| Responsible User | | | ٩ | | | | |
| Responsible Team* | | | | | | | |
| AMHP Coordinator | | | Q | | | | |

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

| ← | Case: Tom, TEST - (24/07/1950) | [CAS-000001-0018] | | | | | ? |
|---|--|--------------------------------------|-----------------------|---|-----------------------|---|---------------------|
| | 1,TEST (ld: 444276) V Person Record | | | | | Born: 24/07/1950 (72 Years) Geno | der: Male NHS No: 📏 |
| | nouns: ierred Name: Tom | | | | | | I 🖓 🥵 👁 |
| м | lenu 🗸 Timeline Details | | | | | | |
| + | 📲 🎝 🗑 Tasks | | | | | | |
| _ | | | | | | | |
| R | 1 | ~ | | Search for reco | ords | | Q 2 |
| R | 1 | ∽ Due ₹i | <u>Status</u> | Search for reco | ords <u>Reason</u> | Responsible Team | Q C |
| | 1 elated Records | | <u>Status</u> Open | | Reason | <u>Responsible Team</u> CareDirectorTest | |
| | 1 elated Records Subject | <u>Due</u> ≣↓ | | Regarding | <u>Reason</u> 150 | | |
| | 1 Nated Records Subject CHC Funding Decision - Fully funded | <u>Due</u> ₹↓ 24/06/2022 08:48:05 | Open | <u>Regarding</u> Tom, TEST - (24/07/19 | <u>Reason</u> 150 | CareDirectorTest | |



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**.

| 🔨 Caredirect 2 D Home 🗂 Workplace 🗸 🕸 Settings 🗸 | Q 🛃 🛠 🕑 🧶 CareDirectorTest |
|--|--|
| 🔶 🖬 🗟 🗸 X Case Note (For Case): New | 0 |
| TOM.TEST.(Id: 444267) Person Record | Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 📏 |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Details | |
| | |
| Details | |
| Case* | Responsible Team* |
| Tom, TEST - (21/06/2022) [CAS-000001-0087] X | CareDirectorTest X Q |
| Reason | Responsible User |
| Q | Scott Simpson X Q |
| Priority | Category |
| Q | Q |
| Date* | Sub-Category |
| | ٩ |
| Status* | Outcome |
| Open v | Q |
| Contains Information Provided By A Third Party? | |

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.

| 人 Caredirector 🎧 Home 🗂 Workplace 🥆 🏟 Settings 🗸 | 🍳 🛃 🛠 边 🥊 CareDirecto | rTest |
|---|--|--------|
| 🔶 🖪 🕼 🖍 🖨 🗄 Form (Case): Adult - Change to Service Request for Mu | ıllenTest, Tom - (03/05/1955) [CAS-000001-000 | ? |
| MULLENTEST 2 (d: 444264) Verson Record | Born: 03/05/1955 (67 Years) Gender: Male NHS No: | \sim |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I | |
| Menu V Details | | |
| Case* Responsible Team* | | í |
| MullenTest, Tom - (03/05/1955) [CAS-000001-0002] Q CareDirectorTest | ٩ | |
| Form Type* Responsible User | | |
| Adult - Change to Service Request | XQ | |
| Status* Due Date | | |
| Complete ~ 23/06/2022 | m | |
| Not Started Review Date | | |
| In Progress Complete Closed | m | |
| Cancelled Approved | | |
| | | |
| | | |

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.

| 3orn: 03/05/1 | 955 (67 Ye | ears) Gen | ider: Male NHS No | |
|---------------|------------|---------------------|---------------------------------------|---------------|
| 8orn: 03/05/1 | 955 (67 Ye | ears) Gen | ider: Male NHS No | |
| | | | I I I I I I I I I I I I I I I I I I I | 2 |
| | | | | |
| | | | | |
| | | | | |
| | | | | 1 |
| | | | | |
| Source | 50 | | | |
| 10 | े ि Source | त्रे 🛛 🖻 Source 🛛 🌠 | à 🖻 Source 💱 | ते 🕒 Source 🔀 |

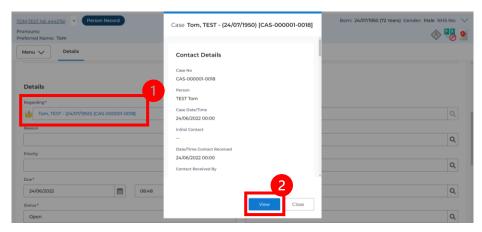


How to tell if an Activity is linked to a Case or Person Record

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.**

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸 | Q 🛃 🛠 🕑 🌅 CareDirectorTest |
|---|--|
| 🔶 🗟 🗟 🎝 🗜 : Task: CHC Funding Decision - Fully funded | 0 |
| TOM.TEST (ld: 444276) Y Person Record | Born: 24/07/1950 (72 Years) Gender: Male NHS No: ∨ |
| Pronouns: Preferred Name: Tom | I I I I I I I I I I I I I I I I I I I |
| Menu V Details | |
| | |
| Details | |
| Regarding* | Responsible Team* |
| Tom, TEST - (24/07/1950) [CAS-000001-0018] | CareDirectorTest |
| Reason | Responsible User |
| Q | ٩ |
| Priority | Category |
| Q | Q |
| Due* | Sub-Category |
| 24/06/2022 🛍 08:48 🛇 | ٩ |
| Status* | Outcome |
| Open v | Q |
| Contains Information Provided By A Third Party? | Is Case Note? |

- 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**.
- 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

 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.

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸 | | | ० द्व 🛇 🖱 🌏 | CareDirector |
|--|---|---|--|--------------|
| 🔶 🖬 🕼 🗸 🗙 Task: New | | | | ? |
| MULLENTEST,Tom (ld: 446230) Person Record | | | Born: 03/05/1995 (27 Years) Gender: Male | NHS No: 🗸 |
| Pronouns: Preferred Name: | | | | چ 📎 |
| Details | | | | |
| Regarding* | | | Responsible Team* | 1 |
| MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | × | Q | CareDirector | XQ |
| Reason | | | Responsible User | |
| | | Q | Scott Simpson | XQ |
| Priority | | | Category | |
| | | Q | | Q |
| Due* | | | Sub-Category | |
| m | | 0 | | Q |
| Status* | | | Outcome | |
| Open | | ~ | | Q |

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.**

| Caredirector 🎧 Home 🗂 Workplace 🗸 🧯 | 🖁 Settings 🗸 | | ⊕ <u>E</u> < | ર ૭ 🏮 | CareDirec |
|--|---|----------------|----------------------------|----------------|-----------|
| 🗧 🖬 🖌 🗸 Task: New | | | | | (|
| ULLENTEST,Tom (Id: 446230) Person Record | | | Born: 03/05/1995 (27 Years |) Gender: Male | NHS No: |
| onouns: eferred Name: | Teams Enter your search criteria. | | | | |
| Details | Look in System Views Lookup View | ~ | | | |
| Regarding* | Search My Teams Reference Data Owner Teams | | | | |
| MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | Name 🔤 | Business Unit | | | XQ |
| Reason | Adults Connecting Care Team West | Adult Services | | | |
| | AMHP rota | Adult Services | | | XQ |
| Priority | CareDirector 2 | CareDirector | | | |
| | Sensory Impairment Team | Adult Services | | | ٩ |
| Due* | | | | | |
| | | | | | Q |
| Status* | | | | | |
| Open | Page 1 | 3 1-4 | | | Q |
| Contains Information Provided By A Third Party? | | | | | |
| O Yes | ок | Close | | | |
| No | e 10 | | | | |



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.

| 人 Caredirector 🔓 Home 📥 Workplace 🗸 🕸 Settings 🗸 | Q 🎚 🛠 🛈 🏮 CareDirector |
|---|--|
| 🗲 🖬 💀 🗸 Task: New | 0 |
| MULLENTE 2 (Id: 446230) Person Record | Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Details | |
| | |
| Regarding* | Responsible Team* |
| Image: MullenTest, Tom - (03/05/1995) [CAS-000001-0011] X Q | Sensory Impairment Team |
| Reason | Responsible User |
| ٩ | Scott Simpson X Q |
| Priority | Category |
| ٩ | Q |
| Due* | Sub-Category |
| | Q |
| Status* | Outcome |
| Open v | Q |
| Contains Information Provided By A Third Party? | Is Case Note? |
| ○ Yes | ○ Yes |
| No | No |
| | |



How to Allocate an existing Activity to another team

 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.

| 🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🟟 Settings 🗸 | | ९ 🖳 🛇 🛈 🃒 | CareE | Director |
|--|---|--|----------|----------|
| 🗲 🖪 🚰 🔕 🎝 i Task: Test | | | | ? |
| MULLENTESI, (d: 446230) Person Record | | Born: 03/05/1995 (27 Years) Gender: Ma | le NHS N | o: 🗸 |
| Pronouns: Preferred Name: | | | A | • |
| Menu V Details | | | | |
| | | | | |
| Details | | | | |
| Regarding* | | Responsible Team* | | |
| MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | Q | Sensory Impairment Team | 0 | |
| Reason | | Responsible User | _ | Ψ |
| | Q | Scott Simpson | × ¢ | 2 |
| Priority | | Category | | - 1 |
| | Q | | C | 2 |
| Due* | | Sub-Category | | |
| 28/10/2022 | 0 | | C | ٦ |
| Status* | | Outcome | | |
| Open | ~ | | C | 2 |

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

| 🙏 Caredirector 🔓 Home 🜈 kplace 🗸 🕸 Settings 🗸 | Q 🛃 🛠 🕑 🌅 CareDirector |
|---|--|
| 🔶 🖬 📾 🖧 🎝 : Task: Test | 0 |
| MULLENTEST.Tom (ld: 446230) Person Record | Born: 03/05/1995 (27 Years) Gender: Male NHS No: ∨ |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Menu V Details | |
| Details Regarding* | Responsible Team * |
| MullenTest, Tom - (03/05/1995). [CAS-000001-0011] | Sensory Impairment Team Q |
| Reason | Responsible User |
| ٩ | ٩ |
| Priority | Category |
| ٩ | ٩ |
| Due* | Sub-Category |
| 28/10/2022 🛍 08:00 🛇 | Q |
| Status* | Outcome |
| Open v | Q |
| Contains Information Provided By A Third Party? | Is Case Note? |
| ^ | · · · |



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.

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 | ₿ Settings ∨ | 🔍 🛃 🛠 讫 🌅 CareDirector |
|---|----------------------------|--|
| 🔶 🖬 😰 🔕 🎝 i Task: Tes | t | 0 |
| MULLENTEST.Tom (Id: 445230) Person Record Pronouns: Preferred Name: | Assign | Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸 |
| Menu V Details | Responsible Team • | |
| Regarding* | Responsible User Decision* | |
| MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | ~ | ٩ |
| Reason | | |
| | | ٩ |
| Priority | | |
| | | ٩ |
| Due* | | |
| 28/10/2022 | | ٩ |
| Status* | | |
| Open | | ٩ |
| Contains Information Provided By A Third Party? | OK Close | |

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.

| \rm Caredirector 🎧 Home 🗂 Workplace 🗸 | ₿ Settings ∨ | 0् 🛃 🛠 🖸 🌅 CareDirector |
|---|--|--|
| 🔶 🖬 🔀 👶 🎝 : Task: Te | st | 0 |
| MULLENTEST.Tom (Id: 446230) Person Record Pronouns: Preferred Name: | Assign | Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸 |
| Menu V Details | Adults Connecting Care Team West X Q | |
| Regarding * | Responsible User Decision* | |
| MullenTest, Tom - (03/05/1995) [CAS-000001-0011] | Do not change v | ٩ |
| Reason | 1 | ٩ |
| Priority | | م |
| Due* 28/10/2022 | | Q |
| Status* Open | 2 | Q |
| Contains Information Provided By A Third Party? | 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.

| Caredirector | G Home | 🖰 Work | splace 🥆 🐯 Settings 🗸 | Œ | | \$ | 3 | 🔵 c | areDirector | Test |
|---------------------------------------|--|----------|--|----------------------|--------|----------|----------|---------------------|-------------|--------|
| < 0 2/ | ₫ 4 | : | Task: Test subject P&A fdjndf | | | | | | | ? |
| TOM,TEST (Id: 444267) | Y Perso | n Record | | Born: 21/06/2022 (20 |) Week | s, 4 Day | /s) Gend | ler: Male | NHS No: | \sim |
| Pronouns: Preferred Name: | | | | | | | | $\langle A \rangle$ | | 9 |
| Menu 🗸 🛛 Det | tails | | | | | | | | | |
| | | | | | | | | | | |
| General | | | | | | | | | | |
| Subject* | | | | | | | | | | |
| Test sublest DOA 6 | djndf | | | | | | | | | |
| Test subject P&A fo | | | | | | | | | | |
| Description | | | | | | | | | | |
| Description | $x^{i} \mid \phi^{\ell} \ \ \underline{\mathcal{I}}_{x}$ | | ** ** **======= | e Ω e | | | | | | |
| Description B I U S × ₂ | | | # # ** E E E E = = = = = = = = = = = = = = = | | :e 🔀 | | | | | |

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**.

| Clone Activity to* | | | Retain Status?* | | 1 |
|--------------------|----------|---|-----------------|--------------|--------------------|
| Adult Safeguarding | | ~ | No | | ~ |
| Person Id | Name | | | Relationship | <u>Primary Rea</u> |
| 444267 | TEST Tom | | | | Adults Safec |
| H Page 1 | | | | | 1-1 |
| | | | | 3 | |



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**.

| Caredirector 🞧 Hon | ne 🗂 Workplace 🗸 🕅 | Settings 🗸 | | € 🛃 🛠 | 🕑 🏮 CareDirectorTe |
|-----------------------------|------------------------|----------------------------|---------------------------------|---------------------------------|---------------------------------------|
| < ∥ ¶ ⊘ | Person: TEST Tom | | | | 0 |
| TOM,TEST (Id: 444267) Perso | n Record | | Born: | 21/06/2022 (15 Weeks, 0 Day |) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu 🔨 Timeline | Summary Profile | Cases Services | Document View All Ad | ctivities | 3 |
| Activities 2 | | 9 | Щ | Raj. | Ø |
| Related Items | Addresses | Alerts And Hazards | Allegations (Alleged Abuser) | Allegations (Alleged Victim) | Attachments |
| | | 20 | 2 | <u> </u> | é |
| Health | Audit | Complaints And Feedback | Contacts | Forms (Person) | Primary Support Reasons |
| Mental Health Act | 9 | | | | |
| Work and Education | Subject Access Request | | | | |
| Other Information | | | | | |
| Finance | | | | | |
| Care Network | | | | | |

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

| Caredirector 🎧 Home 🗂 Work | kplace 🗸 🔞 Settings | \sim | | | Ð 🛃 | \Diamond | 5 | | CareDirectorTest |
|-------------------------------------|---------------------|---|-------------------|------------------|-----------|------------|------|---------|--|
| 🔶 🖋 🦸 🔗 Person: Ti | EST Tom | | | | | | | | ? |
| TOM,TEST (Id: 444267) Person Record | | | | Born: 21/06/2022 | (15 Weeks | , 0 Day) | Gend | er: Mal | e NHS No: 🗸 |
| Pronouns: Preferred Name: | | | | | | | | | Image: A start and a start |
| M 1 Timeline Summary | Profile Cases | Services Doc | ument View | All Activities | | | | | |
| + 🕮 🕮 🗑 Attachme | nts (For Person) | | | | | | | | |
| Related Records 🗸 | | | Search for record | ds | | | | | Q S |
| Title | Document Type | Document Sub | Туре | Date | Crea | ated By | | | Created On |
| | | NO RECOR No results were for this scree | found | | | | | | |
| | | | | | | | | | |



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

| 人 Caredirector 🎧 Home 🖹 Workplace 🗸 🛞 Settings 🗸 | ©् 🧕 🗞 🕚 🌅 CareDirectorTest |
|--|---|
| 🔶 🖬 📓 Attachment (For Person): New | 0 |
| TOM,TEST.(Id: 444267) Person Record | Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | I I I I I I I I I I I I I I I I I I I |
| Details | |
| | |
| General | |
| Person* | Responsible Team * |
| TEST TOM X Q | CareDirectorTest X Q |
| Title * | File* |
| Test Document Upload | |
| Date* | Choose file Browse |
| 04/10/2022 🛍 09:00 🛇 | Declared |
| Document Type* | O Yes |
| Clients X Q | ® No |
| Document Sub Type* | |
| ٩ | l i i i i i i i i i i i i i i i i i i i |
| | |
| Cloning Information | |
| Is Cloned? | Cloned From |
| O Yes | |
| No | |

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

| C Open | | | | | | | × |
|------------------------------|--|------------------|-------------------|------|-------------|--------|--------|
| ← → × ↑ 📙 > TI | his PC > Documents > CareDirector V6 > M | /E Training | | ~ Ū | | ing | |
| Organise 🔻 New fold | 1 | | | | | | ? |
| OneDrive | -Ivanic | Date modified | Турс | Size | | | |
| OneDrive | Training Superuser Booking Sheet | 09/03/2022 10:27 | Microsoft Excel C | 1 KB | | | |
| 💻 This PC | | | | | | | |
| 3D Objects | | | | | | | |
| Desktop | | | | | | | |
| Documents | | | | | | | |
| Downloads | | | | | | | |
| Music | | | | | | | |
| Pictures | | | | | | | |
| 🚆 Videos | | | | | | | |
| 🏭 Windows (C:) | | | | | | | |
| 🛖 Datastore (G:) | | | | | | | |
| 👳 scottsimpson Us | | | | | | | |
| N V | | | | | | | |
| File r | name: Training Superuser Booking Sheet | | | ~ | All files 2 | | \sim |
| | L | | | | Open | Cancel | |

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

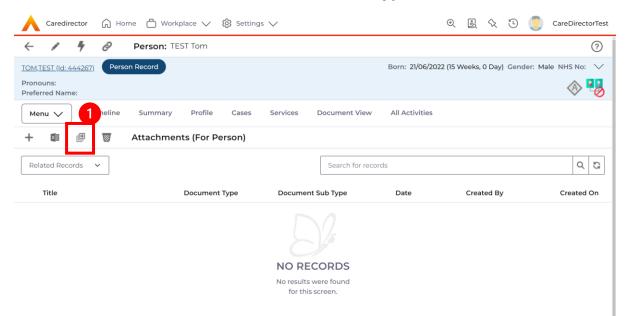


How to upload multiple attachments

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**.

| Caredirector 🎧 Hom | ne 🗂 Workplace 🗸 ध् | Settings 🗸 | | € 🛃 🛠 | 🖸 🏮 CareDirectorTest |
|------------------------------|------------------------|----------------------------|---------------------------------|---------------------------------|---------------------------------------|
| < ∥ ¶ ∂ | Person: TEST Tom | | | | 0 |
| TOM,TEST (Id: 444267) Person | n Record | | Born: | 21/06/2022 (15 Weeks, 0 Day |) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu 🔨 Timeline | Summary Profile | Cases Services | Document View All Ad | tivities | 3 |
| Activities | | 9 | 1 0 | B . | Ø |
| Related Items | Addresses | Alerts And Hazards | Allegations (Alleged Abuser) | Allegations (Alleged Victim) | Attachments |
| | <u>a</u> | 20 | 2 | | é |
| Health | Audit | Complaints And Feedback | Contacts | Forms (Person) | Primary Support Reasons |
| Mental Health Act | 9 | | | | |
| Work and Education | Subject Access Request | | | | |
| Other Information | | | | | |
| Finance | | | | | |
| Care Network | | | | | |

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.

| 🔥 Caredirector 🎧 Home 🖨 Wor | kplace 🗸 🔞 | Settings 🗸 | | | | € | ł | \Diamond | • 🏮 | CareDire | ectorTest |
|--|------------|--------------------|---------------|-------------------|-------|---------------|-----------|------------|------------|------------|-----------|
| - 🖌 🥊 🔗 Person: T | EST Tom | | | | | | | | | | 0 |
| TOM,TEST (Mr) (Id: 444276) Y Person Re | ecord | | | | | Born: 24/07/1 | 950 (72) | Years) | Gender: Ma | ale NHS No | o: 🗸 |
| Pronouns: Preferred Name: Tom | | | | | | | | | | A 오 | • |
| Menu 🗸 Timeline Summary | Profile | Cases Services | Document View | All Activities | | | | | | | |
| 🕂 🗊 🕮 👿 Attachme | | | | | | - | | | | | |
| Related Records V | Up | oload Multiple I | Files | | | | | | | C | 2 2 |
| Title | Docum | Document Type* | | esponsible Team * | | ^ Crea | ted On | | Modified I | 3. | M |
| inte | Docum | | ۹ | CareDirectorTest | XQ | Clea | leu on | | Modified I | <i>J</i> y | - In |
| | | Document Sub Type* | | | | | | | | | |
| | l | | Q | | | | | | | | |
| | | | | | | | | | | | |
| | | Files | | | | | | | | | |
| | | Browse for Files | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | Start Upload | Close | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | · · · |

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**.

| 🔥 Caredirector 🎧 Home 🗂 | Workplace \checkmark 🔞 Settings \checkmark | ତ୍ हु 🛠 🕑 킻 CareDirectorTest |
|----------------------------------|---|--|
| - 🖌 🖣 🔗 Perso | TEST Tom | 0 |
| TOM.TEST (Mr) (Id: 444276) Verse | kon Record | Born: 24/07/1950 (72 Years) Gender: Male NHS No: ∨ |
| Pronouns: Preferred Name: Tom | | I I I I I I I I I I I I I I I I I I I |
| Menu 🗸 Timeline Sumr | mary Profile Cases Services Document View All Activities | |
| 🕂 💷 🕮 👿 Attack | hments (For | _ |
| Related Records v | Upload Multiple Files | [a] p] |
| Title | Docum | Created On Modified By M |
| | Files Browse for Files. Drop files here to attach them | Close |



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.

| 🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 St 2 🗸 | Q द्व 🛇 🗓 CareDirectorTest |
|--|---|
| 🔍 🕂 🖉 🖬 🖗 🛃 👶 🔍 Advanced Searc | ch |
| Record Type | Saved Views |
| Person Addresses | ✓ Delete X |
| 🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 | ৫ খ্রি 🛇 🗿 🌅 Care & Support Commissioning |
| Dashboards Team Cases My Forms | |

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

| ٨ | Caredirector 🎧 Home 🕻 | Caredirector 🎧 Home 🗂 Workplace 🗸 🔞 Settings 🗸 | | € | -20 | \Diamond | 3 | 0 | CareDi | |
|---|-----------------------|--|--|---|-----|------------|---|---|--------|--|
| ÷ | Advanced Searches | Shared with me | | | | | | | | |
| | Business Object Name | Advanced Search Name | | | | | | | | |
| | Document | Active Documents | | | | | | | | |
| | ServiceProvision | Booking requests for carers trust | | | | | | | | |
| | ServiceProvision | Booking requests for Coordination te | | | | | | | | |
| | ServiceProvision | Booking requests- support & enable | | | | | | | | |
| | 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**.

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 | 🖏 Settings 🗸 | | | Q & X U |) | rTest |
|---|---------------------|------------------------|-----------------|------------------------------|----------------------|-------|
| 🔶 🖋 🦸 🤗 Person: TEST Tom | | | | | | 0 |
| IOM,IEST.(Id: 444267) Person Record Pronouns: Preferred Name: | 1 | | Born: 21/ | 06/2022 (14 Weeks, 6 Days) G | iender: Male NHS No: | ~ |
| Menu ∨ Timeline Summary Profile + ∅ ₽ № ₽ | Cases Services | Document View All Ac | tivities | | | |
| Related Records | | Search for re | cords | | Q | G |
| Responsible Team Responsible User | Case Date/Time | Contact Reason | Case No | Presenting Priority | Case Status | Crea |
| CareDirector Support | 21/06/2022 07:00:00 | A - Adult Safeguarding | CAS-000001-0010 | | Assign To Team | Sco |
| AMHP Coordinator | 20/09/2022 09:20:00 | A - AMHP Assessment | CAS-000001-0087 | | Assign To Team | Scot |

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

| Caredirector 🞧 Hon | ne 🗋 Workplace | 〜 袋 Set | tings 🗸 | | | | 0 R 🛠 | CareDirectorTest |
|-----------------------------|---------------------|--|------------|---------------------------|-----------------------|----------------------------|------------------------|---------------------------------------|
| ← : Case: Tom, T | FEST - (21/06/2022) | [CAS-00000] | 1-0087] | | | | | 0 |
| TOM,TEST (Id: 444267) Perso | n Record | | | | | Born: 21/06/2 | 022 (15 Weeks, 0 Day) | Gender: Male NHS No: 🗸 |
| Pronouns: | | | | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu 🔨 Timeline | Details | | | | | | | 3 |
| Activities | 6 | ٢ | | Ø | Ē | 0 | Ē. | * |
| Related Items | Actions | Adult Safeg | uarding | Attachments | Audit | Deprivations Of Liberty | Forms (Case) | Involvements |
| | 28 | iiii - | | lio. | | | | - 1 |
| Other Information | nvolvements History | Joint Case M | 1embers | Status History | | | | |
| | | 1 | F (6 | and Constant | | | | 21/09/2022 13:04:25 |
| Team | | (🖹) | | ase) Created | | | | 21/03/2022 13:04:23 |
| | Q (| Ť | A new rec | ord of form (case) was ci | eated by Scott Sim | pson. | | |
| Profession Type | | | Due Date: | | Form Type: AMHP Re | | Status: In Progress | |
| | Q | | | | | | | |
| | | * | Case Inv | <u>volvement Updated</u> | l | | | 21/09/2022 12:23:12 |
| | | $\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$ | Scott Sim | pson changed End Date | from 'Empty' to '21/ | 09/2022'. | | |
| | | | Involvemen | | Role: | onal Therapist | Start Date: 21/09/2022 | |
| Reset Refresh Ap | ply | | Service | ty Occupational Therapy | Occupatio | mai merapist | 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)**.

| Case: | Tom, TEST - (21/06/2022) [CAS-000001-008 | 87] | | | | (? |
|----------------------------|--|------------|-------------------|------------------|----------------------------|---------------------------------------|
| <u>DM,TEST (Id: 4442</u> | 267) Person Record | | | Born: 21/06/2 | 022 (15 Weeks, 0 Day) Gend | er: Male NHS No: 🚿 |
| ronouns: referred Name: | | | | | | I I I I I I I I I I I I I I I I I I I |
| M1) + ⊠ ₹ | Timeline Details | | | | | |
| Related Records | ~ | | Search for record | ds | | 0,5 |
| <u>Due Date</u> ₹↓ | Form Type | Start Date | <u>Status</u> | Responsible User | Responsible Team | Completed By |
| | AMHP Report Form | 21/09/2022 | In Progress | Scott Simpson | CareDirectorTest | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

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.**

| Caredian Arme 	B Workplace ∨ | | | | € | ł | \Diamond | 5 | | CareDir | ectorTest |
|--|----------|---|--------------------|---------------|--------|------------|-------|---------|----------|-----------|
| Form (Case): New | | | | | | | | | | ? |
| TOM,TEST (Id: 444276) Person Record | | | | Born: 24/07/1 | 950 (7 | 2 Years |) Ger | nder: M | 1ale NHS | No: 🗸 |
| Pronouns: Preferred Name: Tom | | | | | | | | | A • | 0 |
| Details | | | | | | | | | | |
| General | | | | | | | | | | |
| Case* | | | Responsible Team * | | | | | | | |
| Tom, TEST - (24/07/1950) [CAS-000001-0018] | \times | ۹ | CareDirectorTest | | | | | | \times | Q |
| Form Type* | _ | | ponsible User | | | | | | | _ |
| | (| ۹ | | | | | | | | ۹ |
| Status* | | | Due Date | | | | | | | |
| In Progress | ~ | · | | | | | | | | m |
| Start Date* | | | Review Date | | | | | | | _ |
| 21/10/2022 | l | | | | | | | | | |
| Preceding Form | | | | | | | | | | |
| | (| Q | | | | | | | | |
| A Jalaha - 1 1.6 | | | | | | | | | | |



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.

| 🔨 Caredirector 🕼 🚹 🖱 Workplace 🗸 🕸 Settings 🗸 | | Q 🛃 🛠 🛈 🌷 CareE | DirectorTest |
|---|----------|---|--------------|
| 🔶 🖬 💀 🖍 🗐 : Form (Case): AMHP Report Form | for Tom, | TEST - (21/06/2022) [CAS-000001-0087] Starting 21/09/2022 created by Scott Sim. | |
| IOM,IEST.(Id: 444267) Person Record | | Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NH | IS No: 🗸 |
| Pronouns: Preferred Name: | | | \land 🍓 |
| Menu 🗸 Details | | | |
| General Case* | | Responsible Team * | |
| Tom, TEST - (21/06/2022) [CAS-000001-0087] | Q | CareDirectorTest | Q |
| Form Type* | | Responsible User | |
| AMHP Report Form | Q | Scott Simpson | (Q |
| Status* | | Due Date | |
| In Progress | ~ | | |
| Start Date* | | Review Date | |
| 21/09/2022 | | | |
| Preceding Form | | | |
| | Q | | |
| | | | |
| A dditional Information | | | |

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

| Caredirector 1 Home | 🖞 Workplace 🤍 🚯 Settings 🗸 | |
|-------------------------------------|--------------------------------------|---|
| | AMHP Report Form | |
| TOM,TEST (Id: 444267) Person F | Record | Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | | |
| Service User Details | | |
| Referral Details Further Details | | |
| Background Information | Client previously known to services? | |
| AMHP'S Assessment of th | O Yes O No | |
| | O res O NO | |
| | | |
| | Ethnic Origin | |
| < | O White - British / Northern Irish | |
| | O White - Irish | |
| | O White - Gypsy or Irish Traveller | |
| | O White - Eastern European | |
| | O Mixed - White and Black African | |
| | O Mixed - White and Black Caribbean | |
| | O Mixed - White and Asian | |
| | O 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.

| Caredirector 🞧 Home | 🗂 Workplace 🗸 🔯 Settings 🗸 | | | € | ł | \Diamond | 3 | | CareDir | ectorTest |
|----------------------------------|---------------------------------------|---------|---|------|---------|------------|--------|---------|---------|-----------|
| 🔶 🖬 🗟 🖍 🖨 | : Crm (Case): Adult - Change to Servi | ice Req | uest for Tom, TEST - (24/07/1950) [CAS-000001 | -001 | 8] Sta | rting | 20/10/ | /2022 c | reate | ? |
| TOM,TEST (Id: 444276) Verson | Print History | | Born: 24 | /07/ | 1950 (7 | 2 Years |) Gen | der: Ma | ale NHS | No: 🗸 |
| Pronouns: Preferred Name: Tom | Share | | | | | | | | ۸ ۲ | 0 |
| Menu 🗸 Details | Assign 3 | | | | | | | | | |
| | Clone | | | | | | | | | |
| | Sync with PDS | | | | | | | | | |
| General | Restrict Access | | | | | | | | | |
| Case* | Delete | | Responsible Team * | | | | | | | |
| Tom, TEST - (24/07/1950) [CAS-00 | Run Workflow | Q | CareDirectorTest | | | | | | | Q |
| Form Type* | Copy Record Link | | Responsible User | | | | | | | |
| Adult - Change to Service Reque | st | Q | Scott Simpson | | | | | | × | Q |
| Status* | | | Due Date | | | | | | | |
| In Progress | | ~ | 27/10/2022 | | | | | | | # |
| Start Date* | | | Review Date | | | | | | | |
| 20/10/2022 | | Ê | | | | | | | | ## |
| Preceding Form | | | | | | | | | | |
| | | Q | | | | | | | | |

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.

| 🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 | Settings 🗸 | 🔍 🛃 🛠 🗿 🌅 CareDirectorTest |
|--|---|--|
| 🔶 🖬 🕼 🖍 🛱 🗄 Form (Case |): Adult - Change to Service Request for Tom, TEST - (24/07/195 | 50) [CAS-000001-0018] Starting 20/10/2022 create 🧿 |
| TOM.TEST.(Id: 444276) Y Person Record | | Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: Tom | Teams Enter your search criteria. | la 😽 🔊 |
| Menu V Details | Look My Teams ~ in System Views Lookup View | |
| General | Search My Teams Reference Data Owner Teams | |
| Case* | | |
| Tom, TEST - (24/07/1950) [CAS-000001-0018] | CareDirectorTest CareDirectorTest | ۹. |
| Form Type* | | |
| Adult - Change to Service Request | | x Q |
| Status* | | |
| In Progress | | * |
| Start Date* | | |
| 20/10/2022 | | · |
| Preceding Form | | |
| | OK Close | |
| A statistics of the forward in a | | |



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**.

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 | û Settings ∨ | 🔍 द्वि 🛠 🕑 🌅 CareDirectorTest |
|--|---|--|
| 🔶 🖬 🗟 🖍 🖨 🗄 Form (C | ase): Adult - Change to Service Request for Tom, TEST - (24/07/1950) [CAS | -000001-0018] Starting 20/10/2022 create (?) |
| IOM.TEST.(Id: 444276) Person Record Pronouns: Preferred Name: Tom | Assign | Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸 |
| Menu V Details | Accommodation Team X Q | |
| General | Responsible User Decision* Clear on current record only | |
| Case * Tom, TEST - (24/07/1950) [CAS-000001-0018] | Include inactive? Related Records to Include | Q |
| Form Type* Adult - Change to Service Request | Check/Uncheck All Appointment | x Q |
| Status* | Assessment Factor Attachment (Case Form) | |
| Start Date* 20/10/2022 | Email Email Attachment | |
| Preceding Form | OK Close | |
| A statut | | |



How to Clone a Form

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

| Caredirector 🎧 Home 🗂 Workplan | .ce 🗸 🔞 Settings 🗸 | | | € | 🖳 🛇 🕚 🌅 CareDirector |
|-----------------------------------|-----------------------|---|---------------------------------|-------------------------|------------------------------------|
| Case: Tom, TEST - (21/06/202 | .2) [CAS-000001-0087] | | | | (|
| MTEST (Id: 444267) Person Record | | | | Born: 21/06/2022 (14 We | reks, 6 Days) Gender: Male NHS No: |
| Menu A Timeline Details | | | | 3 | |
| Activities 2 | Adult Safeguarding | Attachments Audit | Deprivations Of Liberty | E 1 | 같 옷 ements Involvements History |
| Other Information Joint Case Memb | bers Status History | | | | |
| tam | | Form (Case) Created A new record of form (case) was created by | y Scott Simpson. | | 21/09/2022 13:04:25 |
| ofession Type | a < | Due Date: | Form Type: AMHP Report Form | Status: In Progres | 55 |
| | * | Case Involvement Updated Scott Simpson changed End Date from 'Er | npty' to '21/09/2022'. | | 21/09/2022 12:23:12 |
| | | Involvement Member: Community Occupational Therapy Service | Role: Occupational Therapist | Start Date: 21/09/2022 | |
| | * | Case Involvement Created | ated by Scott Simpson. | | 21/09/2022 12:17:20 |
| | | | | | |

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

| 🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🍪 Settings 🗸 | | | | | 0. B. 🛠 | 🕒 🏮 CareDirector | rTest |
|--|------------|-------------|--------------------|------------------|----------------------------|----------------------|--------|
| 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: | \sim |
| Pronouns: Preferred Name: | | | | | | A 🖲 | ø |
| Menu V Timeline Details | | | | | | | |
| + 💷 🎗 🗑 Forms (Case) | | | | | | | |
| Related Records 🗸 | | | Search for records | | | Q | G |
| Due Date FJ Form Type | Start Date | Status | Responsible User | Responsible Team | Completed By | Completion Date | Sign |
| AMHP Report Form | 21/09/2022 | In Progress | Scott Simpson | CareDirectorTest | | | |
| AMHP Report Form | 21/09/2022 | In Progress | Scott Simpson | CareDirectorTest | | | |
| | | | | | | | |



| Caredirector 🞧 Home | 5 × 1 × × | ĝ Settings 🗸 | | | € | 8 | 2 🖱 | Care | eDirectorTest |
|-----------------------------------|------------------|---|----------|--|------------|------------|----------|--------------|---------------|
| < 🖬 🗟 🖍 🖷 | : Form (Ca | ase): AMHP Report Form for Tom, TEST - (7 | 21/06/20 | 22) [CAS-000001-0087] Starting 21/09/2022 created by Sco | ott Simps | son | | | ? |
| TOM,TEST (Id: 444267) Person Reco | Print History | | | Born: 21/06/ | 2022 (14 V | Veeks, 6 I | Days) Ge | nder: Male N | IHS No: 🗸 |
| Pronouns: Preferred Name: | Share | 2 | | | | | | | 🕭 🛞 |
| Menu 🗸 Details | Clone | | | | | | | | |
| | oyne marr bo | | | | | | | | |
| General | Restrict Access | | | | | | | | |
| Case * | Delete | | | Responsible Team * | | | | | |
| Tom, TEST - (21/06/2022) [CAS-00 | Run Workflow | | Q | CareDirectorTest | | | | | Q |
| Form Type* | Copy Record Link | | | Responsible User | | | | | |
| AMHP Report Form | | | Q | Scott Simpson | | | | 1 | XQ |
| Status* | | | | Due Date | | | | | |
| In Progress | | | ~ | | | | | | |
| Start Date* | | | | Review Date | | | | | |
| 21/09/2022 | | | Ê | | | | | | m |
| Preceding Form | | | | | | | | | |
| | | | Q | | | | | | |
| | | | | | | | | | |
| Additional Information | | | | | | | | | |
| Separate Assessment | | | | Combined Carer Assessment | | | | | |
| O Yes | | | | ○ Yes | | | | | |
| No | | | | No | | | | | |

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.**

| | | P Report Form for Tom, TI | EST - (21/06/2022) [CAS | 5-000001-0087] S | | | |
|----------------------------------|----------------------|---------------------------|-------------------------|----------------------|----------------------|--------------------------------|----------------------------|
| TEST (Id: 444267) Person Record | | | | | Bo | orn: 21/06/2022 (14 Weeks, 6) | Days) Gender: Male NHS No: |
| ouns: erred Name: | | | | | | | \otimes |
| enu 🗸 Details | | | | | | | |
| | Clone Form (Case) | | | | | | |
| General | Start Date of Form * | | | | | | |
| aso* | 03/10/2022 | m | | | | | |
| Tom, TEST - (21/06/2022) [CAS-00 | 03/10/2022 | | | | | | |
| | Person | Case | Case Start Date | Case Status | Responsible Team | Responsible | ~ |
| orm Type* | TEST Tom (Primary | CAS-000001-0010 | 21/06/2022 07:00 | Assign To Team | CareDirector Support | | |
| AMHP Report Form | TEST Tom (Primary | CAS-000001-0087 | 20/09/2022 09:2 | Assign To Team | AMHP Coordinator | | XQ |
| tatus* | | | | | | | |
| In Progress | I≪ ♥ Page 1 ► | | | | | 1-2 | # |
| art Date* | | | | | | | |
| 21/09/2022 | | | | | | | m |
| receding Form | | | | | | | |
| | | | | | | | |
| | | | | | | _ 1 | |
| | | | | | Clor | ne Cancel | |
| dditional Information | | | | | | | |
| eparate Assessment | | | Combin | ned Carer Assessment | | | |
| Yes | | | O Yes | | | | |

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.

| 人 Caredirector 🔓 Home 🗂 Workplace 🗸 🕲 Settings 🗸 | | Q 🛃 🛠 🛈 🌅 CDV | /6 Team |
|--|----------|---|-----------|
| 🔶 👁 📮 🐻 : Form (Case): Adult Care and Supp | port Pla | an for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022 | ? |
| TOM,TEST (Id: 444267) Y Person Record | | Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS N | lo: 🗸 |
| Pronouns: Preferred Name: | | I I I I I I I I I I I I I I I I I I I | 8 |
| Menu V Details | | | |
| Ceneral | | | |
| Case* | | Responsible Team* | |
| Tom, TEST - (21/06/2022) [CAS-000001-0087] | Q | CareDirectorTest | Q |
| Form Type* | | Responsible User | |
| Adult Care and Support Plan | Q | Scott Simpson | Q |
| Status* | | Due Date | |
| Closed | ~ | 11/11/2022 | ## |
| Start Date* | | Review Date | |
| 09/11/2022 | Ê | | m |
| Preceding Form | | | |
| | Q | | |
| | | | |
| Completion Details | | | |
| Completed By* | | Completion Date* | |
| Scott Simpson | Q | 09/11/2022 | |
| Signed Off By* | | Signed Off Date* | |
| Scott Simpson | Q | 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.

| 🔨 Caredirector 🎧 Home 📥 Workplace 🗸 🕸 Sett | ings 🗸 | 🔍 🛃 🛠 🕲 🌅 CareDirectorTest |
|--|------------------|---|
| 🔶 👁 🖨 🔂 : Form (Case): Occupat | ional Therapy Co | nversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St |
| OM,TEST (Id: 444267) Y Person Record | | Born: 21/06/2022 (20 Weeks, 4 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | | I I I I I I I I I I I I I I I I I I I |
| Menu 🗸 Details | | |
| | | |
| General | | |
| Case* | | Responsible Team* |
| Tom, TEST - (21/06/2022) [CAS-000001-0010] | Q | CareDirectorTest |
| Form Type * | | Responsible User |
| Occupational Therapy Conversation Record | Q | Scott Simpson Q |
| Status* | | Due Date |
| Closed | ~ | 20/12/2022 |
| Start Date* | | Review Date |
| 10/11/2022 | | m |
| Preceding Form | | |
| | | |

2. Select the Three Dots and select Activate.

| Caredirector 🞧 Ho | ome 💾 Workplace | \checkmark 🔯 Settings \checkmark | | | € | Ę | \Diamond | € | | CareDirect | torTest |
|------------------------------|-------------------|--------------------------------------|-----------|---------------------------------|---------|--------|------------|--------|---------|------------|---------|
| ← ● 🖬 🗟 | : Urm (Ca | se): Occupational The | erapy Co | nversation Record for Tom, TEST | - (21/0 | 6/2022 | 2) [CA | S-000 | 001-00 | 010] St | ? |
| TOM,TEST (Id: 444267) | Share | | | Born: 21/06/20 | 22 (20 | Weeks, | 4 Day | s) Gen | ider: M | ale NHS No | . ~ |
| Pronouns: Preferred Name: | Assign | | | | | | | | À | - 🔧 🗳 | 9 |
| Menu 🗸 Details | Clone | | | | | | | | | | |
| | Restrict Access | 2 | | | | | | | | | |
| | Activate | | | | | | | | | | |
| General | Delete | | | | | | | | | | |
| Case* | Run Workflow | | | Responsible Team* | | | | | | | |
| Tom, TEST - (21/06/2022) [| Copy Record Link | | Q | CareDirectorTest | | | | | | 0 | |
| Form Type* | | | | Responsible User | | | | | | | |
| Occupational Therapy Co | nversation Record | | Q | Scott Simpson | | | | | | Q | |
| Status* | | | | Due Date | | | | | | | |
| Closed | | | ~ | 20/12/2022 | | | | | | Ê | |
| Start Date* | | | | Review Date | | | | | | | |
| 10/11/2022 | | | ** | | | | | | | Ê | |
| Preceding Form | | | | | | | | | | | |
| scripturgid(0) | | | | | | | | | | | - |



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.

| Caredirector 🎧 Home 🗂 Workplace 🗸 | 없 Settings 🗸 | €. | 🛠 🕒 🌅 CareDirectorTest |
|-------------------------------------|---|-------------------------------|------------------------------|
| 🔶 🖋 🦸 🤗 Person: TEST Tom | | | 0 |
| TOM,TEST (Id: 444267) Person Record | | Born: 21/06/2022 (13 Weeks, 3 | Days) Gender: Male NHS No: ∨ |
| Pronouns: Preferred Name: | 1 | | I 😵 🔧 |
| Menu V Timeline Summary Profile | Cases Services Document View | All Activities | |
| Filter By | SEP 2022 | | İ |
| | Task Created | | 21/09/2022 13:42:01 |
| From | A new record of task was created by Scott Sim | pson. | |
| (| Responsible Team: Responsit | ble User: Su | bject: |
| То | CareDirectorTest Scott Sin | npson Re | eferral has been Allocated |
| | Form (Case) Created | | 21/09/2022 13:04:25 |
| Team | A new record of form (case) was created by Sc | ott Simpson. | |
| Q | | | |
| Profession Type | Due Date: Form Typ AMHP R | | atus: Progress |
| Q | | | 22/00/2020 10 07 |
| | Case Involvement Updated | | 21/09/2022 12:23:12 |
| Reset Refresh Apply | Scott Simpson changed End Date from 'Empty | r' to '21/09/2022' | |

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.

| Caredirector 🎧 Home (| 🗂 Workplace 🗸 හිූ Settings | · · · | ÷ | % 🖸 🌅 | CareDirectorTest |
|---|----------------------------|-------------------------|-----------------------------|--------------------|------------------|
| 🔶 🖋 🧗 🔗 Per | son: TEST Tom | | | | ? |
| TOM.TEST (ld: 444267) Person Reco Pronouns: Preferred Name: | brd | 1 | Born: 21/06/2022 (13 Weeks, | 3 Days) Gender: Ma | le NHS No: 🗸 |
| 2 Menu ✓ Timeline Sur + Ø � ♪ ★ | mmary Profile Cases | Services Document View | All Activities | | |
| Related Records | ~ | Search for record | ds | | Q 3 |
| □ <u>Id</u> ≣↓ <u>Person</u> | Id [Person] Status | Planned Start D Planned | End Da Actual Start Date | Actual End Date | Service Eleme |
| □ 220022 TEST Tom | 444267 Draft | 08/08/2022 | | | Adult Residen |

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.

| Caredirect 4 Home 🗂 Workplace 🗸 🕸 | Settings 🗸 | | 🔍 🛃 🛠 🛈 킻 CareDirectorTest |
|---|--|-----------------------------|--|
| 🔶 🖬 🗟 🕹 🎝 : Service Prov | vision: Tom Jones \ 220015 \ 24 Jun 2022 | | 0 |
| IOM.TEST.(Mr).(ld: 444276) V Person Record | | | Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: Tom | Service Provision Statuses Enter your | r search criteria. | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details Costs Per Wee | Look Lookup Records | ~ | |
| General | Search Search for records | Q C | |
| Person* | Name | <u>Code</u> ≟↓ <u>Gov C</u> | |
| TEST Tom | Draft | 1 | Q |
| ld* | Booking Request | 20 | |
| 220015 | Validation Required | 30 | Q |
| | Waiting List | 40 2 | |
| Status* | Rejected | 50 | |
| Draft | Ready for Authorisation | 60 | |
| Service Request Service Element 1* Adult Residential Care | Page 1 | 3 ¹⁻⁶ Close | X Q |
| Special Scheme | Finance Clier | nt Category | |
| | | | · |

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**.

| Caredired | tor 🎧 Hon | ne 💾 Workplace 🗸 🔞 S | Settings 🔨 | / | | | € | R & O 🄇 | CareDirectorTest |
|-----------------------------|---------------------|-------------------------|------------|------------------------|------------------|-------------------|-----------------|----------------------|------------------|
| ~ / | 4 Ø | Person: TEST Tom | | | | | | | ? |
| TOM,TEST (Mr) (Id | <u>i: 444276)</u> 💙 | Person Record | | | | | Born: 24/07/195 | 0 (72 Years) Gender: | Male NHS No: 🗸 |
| Pronouns: Preferred Name | Tom | | | 1 | | | | | \land 👱 🥵 |
| Menu 🗸 | Timeline | Summa Profile Ca | ises S | ervices Docum | ent View All Act | ivities | | | |
| + 🛯 | 20 I . | 🛊 💠 Service Provis | sions | | | | | | |
| Related Recor | ds | Unpin from me | ~ | | Search for re | cords | | | Q 13 |
| | | Ready to Authorise | 4 | | | | | | |
| | Person | Authorise | | <u>Planned Start D</u> | Planned End Da | Actual Start Date | Actual End Date | Service Element 1 | |
| 2 20015 | TEST Tom | Calculate Cost Per Week | | 24/06/2022 | | | | Adult Residential | Care |
| 220012 | TEST Tom | Cancel | equest | 24/06/2022 | | | | SDS - WMDC Man | aged Account |
| | | Update GL Code | | | | | | | |
| | | Bulk Edit | | | | | | | |
| | | Delete | | | | | | | |
| | | | | | | | | | |



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.

| Caredirector | ကြဲ Home ပြီ | Workplace 🗸 🔞 Sett | ings 🗸 | | | Q 🛃 🛇 | ى 🕲 | CareDirectorTest |
|------------------------------|------------------|-------------------------|-------------------|--------------------|---------------------|----------------------|---------------------------|------------------|
| ← : Serv | ice Provision: | Tom MullenTest \ A J Sc | ocial \ SDS - Mai | naged Account \ He | ome Care \ Spot \ 2 | 20110 \ 08 Nov 20 | 22 | ? |
| MULLENTEST.Tom (Id: 4 | <u>144264)</u> - | Person Record | | | Born: | 03/05/1955 (67 Years | s) Gender: Mal | e NHS No: 🗸 |
| Pronouns: Preferred Name: | | | 1 | | | | $\langle \! \! A \rangle$ | 🍓 🖺 |
| Me 2 | meline Detai | ls Service Deliveries | Service Delive | ery Variations Co | sts Per Week Fi | nance Transactions | | |
| + 💵 🎗 | Servic | e Deliveries | | | | | | |
| Related Records | ~ | | | Search for re- | cords | | | Q |
| Person | Id | Planned Start Ti | Units | Total Units | Total Visits | Monday | Tuesday | / Wed |
| | | | | | | | | |
| | | | NO | RECORDS | | | | |
| | | | | ults were found | | | | |
| | | | for | this screen. | | | | |
| | | | | | | | | |

- 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.



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| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸 | 🍳 🛃 🛠 🖸 🌅 CD V6 Team |
|--|--|
| 🔶 🖬 📓 🔕 🍫 : Service Delivery: TEST Tom \ Rea | blement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2 📀 |
| TOM,TEST (ld: 444267) Y Person Record | Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | A 🛂 🗿 🍳 |
| Menu V Details Variations | |
| | |
| A | |
| General | |
| Service Provision* | Responsible Team • |
| TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 22008 Q | CareDirectorTest Q |
| ld* | Rate Unit* |
| 188114 | Per I Hours (Whole) \ Hours (Part) |
| Planned Start Time* | Units* |
| 09:00 | 1.0000 |
| Total Visits* | Total Units* |
| 7 | 7.0000 |
| Number of Carers* | |
| 1 | |
| | |
| Calendula annifica ta dava | |
| Schedule applies to days | |
| Select All* | Thursday* |
| Yes | Yes |
| O No | ○ No |
| Monday* | Friday* |
| Yes No | Yes No |
| | |
| Tuesday* | Saturday* Ves |
| O No | ○ No |
| Wednesday* | Sunday* |
| Yes | Yes |
| O No | ○ 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

| 🖌 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Setting: | s 🗸 | | Q B & U | CareDirect |
|--|---------------------------|--|-------------------------------|--------------|
| - 🖬 🗟 🎝 🎝 😳 Service Provision: | Tom Test \ Carers Trust - | 205632 \ ISF Provider \ ISF \ \ \ Spot \ 225727 \ 21 | i Oct 2022 | (|
| ST.Tom (Id: 446228) Person Record | | Born: 03/ | (05/1995 (27 Years) Gender: 1 | Male NHS No: |
| onouns: Iferred Name: | | | | A 🖣 |
| fenu V Timeline Details Costs Per Week Fir | nance Transactions | | | |
| General | | | | |
| Person * | | Responsible Team * | | |
| Tom Test | Q | CareDirector | | Q |
| d | | Responsible User* | | |
| 225727 | | Scott Simpson | | Q |
| itatus* | | | | |
| Authorised | ۹ | | | |
| | | | | |
| Service Request | | | | |
| Service Element 1* | | Service Element 2* | | |
| ISF Provider | Q | ISF | | Q |
| Special Scheme | | Finance Client Category | | |
| | | | | |

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

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

| Caredirector | Workplace 🗸 🔞 Settin | ngs 🗸 | | ९ द्वि 🔩 😒 🌷 | CareDirecto | or |
|---|---|--------------------------|---------|--|-------------|----|
| ← ⊟ ⊡ ∴ ↓ | : Service Provision | n: Tom Test \ Carers Tru | ust - 2 | 205632 \ ISF Provider \ ISF \ \\ Spot \ 225727 \ 21 Oct 2022 | ? | 9 |
| TEST.Tom (ld: 446228) Person Reco Pronouns: Preferred Name: | Unpin from me | 2 | | Born: 03/05/1995 (27 Years) Gender: Male N | нѕ No: 🚿 | 5 |
| Menu V Timeline D | Budget Position Statement Clone Calculate Cost Per Week | mance Transactions | | | | Ì |
| General Person* Tom Test | Update GL Code Restrict Access Delete | с | 2 | Responsible Team* CareDirector | Q | |
| Id 225727 | Run Workflow Copy Record Link | | | Responsible User* Scott Simpson | Q | |
| Status* | | С | 2 | | | |
| Service Request | | | | Service Element 2* | | |
| ISF Provider Special Scheme | | C | | ISF Finance Client Category | Q | |



| 👗 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 S | ettings 🗸 | 🔍 🛃 🛠 🖸 🌅 CareDirector |
|---|---|--|
| 🔶 🖬 🕼 👶 🎝 i Service Provi | sion: Tom Test \ Carers Trust - 205632 \ ISF Provider \ ISF \ \\ Sp | ot \ 225727 \ 21 Oct 2022 |
| TEST.Tom (Id: 446228) Person Record Pronouns: Preferred Name: | Clone Service Provision | Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸 |
| Menu V Timeline Details Costs Per Week | Start Date* 21/10/2022 | |
| General Person* | Change in type of care XQ | |
| Tom Test | | ٩ |
| ld 225727 | | ٩ |
| Status* | | |
| Service Request | 2 Clone Cancel | |
| ISF Provider | | ٩ |
| Special Scheme | Finance Client Category | |

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**.

| 🔥 Caredirector 🔓 Home 🗂 Workplace 🗸 🕸 Settings 🗸 | | | Q 🎚 🛇 🗓 CareDirectorTest |
|--|--------------|---------|--|
| | m \ Co-ord | linatio | on Team \SDS - WMDC Managed Account \ Home Care \ \\ Spot \ 220012 \ 24 Ju 🕥 |
| TOM.TEST. (Mr). (Id: 4442 Person Record | | | Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: Tom | | | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details Service Deliveries Service Del | livery Varia | tions | Costs Per Week Finance Transactions |
| | | | Per r hour (hours (Part) |
| | | | |
| Dates | | | |
| Planned Start Date | | | Planned End Date |
| 24/06/2022 | | m | ■ 1 |
| Actual Start Date | | | Actual End Date |
| | | m | 21/10/2022 |
| Start Reason* | | | End Reason* |
| New Placement | × | Q | Carer's Decision X Q |
| | | | |
| Commissioning | | | |
| Purchasing Team | | | Frequency in Weeks* |
| Adults Connecting Care Team East | × | Q | 1 |
| | | | |



How to search for a Provider

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

| Caredirector | Home 🕒 Workplac | ce 🔨 🔯 Settings 🔨 | / | | CareDirectorT |
|---|----------------------------------|-------------------|---|------------------|----------------------------------|
| My Work | | 8 | 2 | (*) | <u>a</u> |
| | Dashboard 2 | Reports | People | Cases | Forms (Case) |
| Finance | <u> </u> | <u>i</u> | | <u>.</u> | 2 |
| Admin | Providers | Professionals | My Diary | Contacts | Carer Exemption And Extension |
| + 3 | | | + 3 | | |
| Due Date: 12/09/20 Case: Deborah, Trai | 22 in - (24/11/1983) [CAS-000 | 001-0331] | Person: Train Kayo Due Date: 28/07/2 | | |
| Ø 4 ⁷ | | | Ø 2 | | |
| Due Date: 12/09/20 Case: ELIZABETH, 1 | 22 [RAIN - (06/09/2018) [CAS | -000001-0334] | Person: Sarah Trai Due Date: 28/07/2 | | |
| | | | 19 .2 | | |

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.

| | Caredirector | 🔓 Home 📋 Workpla | ace 🗸 🔯 Settings 🗸 | | + R | 5 D 🔇 | CareDirectorTrain |
|--------------|------------------|--------------------------|--------------------|--------------------|--------|-------|-------------------|
| \leftarrow | + 🖾 | <i>@∂</i> 1 , : P | Providers | | | | ? |
| м | y Team Providers | ~ | | Search for records | | | Q 13 |
| | ld | <u>Name</u> ≟↓ | Provide | er Type Account | Number | Email | Main Phone |
| | 1 | Croft Care Services | Supplie | er | | | 01924 22016 |

| Page 1 | 1-1 |
|--------|-----|
|--------|-----|

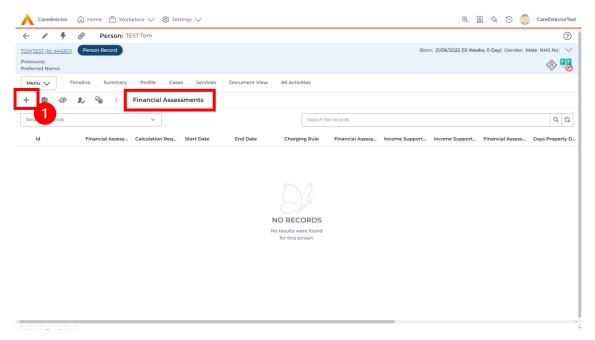


Where to find Financial Assessments

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

| 140 | Person: TEST Tom | | | | | | | |
|--------------------------|-------------------|--------------------------|---------------------------------------|--------------------------|--|-----------------|---|--------------------------------|
| .TEST (ld: 444267) Perso | n Record | - | | | | Born: 21/0 | 06/2022 (15 Weeks, 0 Day) | Gender: Male NHS No: |
| erred Name | | | | | | | | |
| enu 🔨 Timeline | Summary Profile | Cases Serv | ices Document View | All Activities | | | | |
| Activities | dilowances | 🧭 Finance Transaction | s Financial Assessment | Funding Statuses | Person Financial Detail | Personal Budget | Service Delivery Variation Moderations | Service Delivery Variations |
| Related Items Health | Service Provision | Services Package | | 3 | | | | |
| Mental Health Act | | | | | | | | |
| Work and Education | | | | | | | | |
| Other Informatio | | | | | | | | |
| Finance | | | | | | | | |
| Care Network | | | | | | | | |
| | | | A new record of task was o | created by Scott Simpson | L. | | | |
| | | | Responsible Team: CareDirectorTest | | Responsible User: Catherine Jackson | | Subject: PB Cash Direct Paymer | it – Change in Care |
| | | | Service Provision Cro | | | | | 28/09/2022 12:44:58 |

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

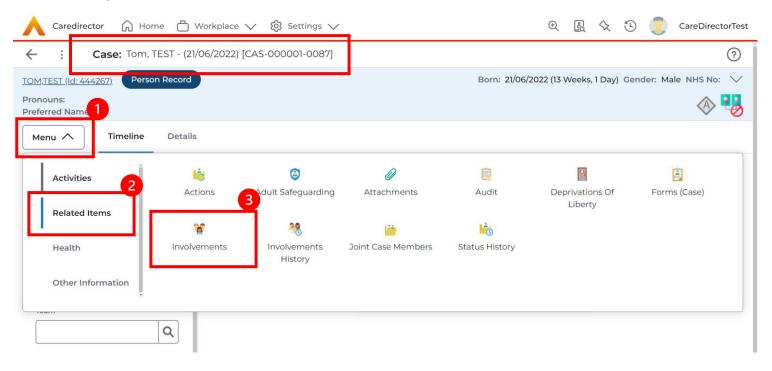




How to close a Case

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.





CAREDIRECTOR SI/ OT TEAM

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

| 🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings | \checkmark | | t 🛃 🛠 | ت 👤 | CareDirectorTest |
|--|--------------|-------------------------|--|--------------|---------------------------------------|
| ← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] | | | | | ? |
| TOM,TEST (Id: 444267) Person Record | | Born: 21/06/2 | 022 (13 Weeks, 1 Day) | Gender: Male | NHS No: 🗸 |
| Pronouns: Preferred Name: | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | | | | | |
| + 💵 🕵 🗑 Case Involvements | | | | | |
| | | | | | Q 🖸 |
| Related Records 🗸 | Search for | records | | | |
| Related Records ✓ Involvement Member ₹↓ Role | Case | Responsible Team | <u>Start Date</u> ≣↓ | End Date | |
| | | <u>Responsible Team</u> | <u>Start Date</u> , 21/09/2022 | End Date | |
| □ Involvement Member = Role Involvement Re | Case | <u>Responsible Team</u> | | End Date | <u>Creat</u> |
| □ Involvement Member = Role Involvement Re | Case | <u>Responsible Team</u> | | End Date | <u>Creat</u> |



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.

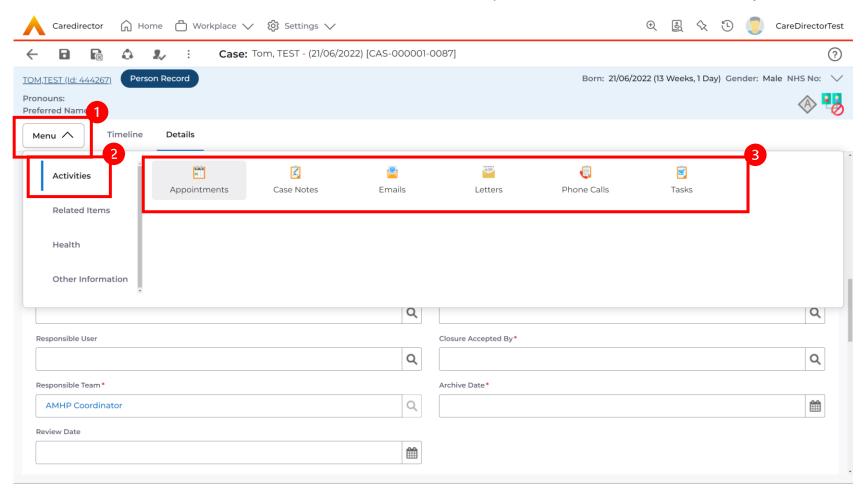
| enu V | ase Involvement with | in Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by S | Scott Simpson o |
|--|----------------------|---|-----------------|
| General | | | |
| ase* | | Responsible Team • | |
| Tom, TEST - (21/06/2022) [CAS-000001-0087] | Q | CareDirectorTest | Q |
| erson* | | Involvement Priority | |
| TEST Tom | Q | | Q |
| nvolvement Member* | | Involvement Status | |
| Community Occupational Therapy Service | Q | 1 | Q |
| ole * | | End Date | |
| Occupational Therapist | Q | 21/09/2022 | m |
| tart Date* | | Involvement End Reason | |
| 21/09/2022 | # | | Q |
| nvolvement Reason | | Involvement Review Date | |
| | Q | | # |

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.

| Caredirector 🎧 Home 🗂 Wor | kplace 🗸 👸 Settings | \sim | | | t 🛃 🛠 🖒 | CareDirectorTest |
|-------------------------------------|---------------------|---------------|--------------------------|---------------|------------------------------------|---------------------------------------|
| ← Case: Tom, TEST - (21/06/2022) | [CAS-000001-0087] | | | | | ? |
| TOM,TEST (Id: 444267) Person Record | | | | Born: | 21/06/2022 (13 Weeks, 1 Day) Gende | r: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | | | | | | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | | | | | | |
| 🕂 💵 🎗 🗑 Tasks | | | | | | |
| Related Records | • | | Search for records | | | Q 3 |
| Subject | <u>Due</u> ≣↓ | <u>Status</u> | <u>Regarding</u> | <u>Reason</u> | <u>Responsible Team</u> | <u>Responsible User</u> |
| 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.**

| Caredirector 🞧 Home | [□] (1) ^{kplace} ∨ [©] Settings ∨ | रू 🚉 🛠 🔁 🥊 CareDirectorTest |
|--|---|---|
| ← 🖬 🗟 🎝 | : Task: Referral has been Allocated | (?) |
| TOM,TEST (Id: 44426 3 Person Rec | Clone 2 | Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 💛 |
| Pronouns: Preferred Name: | Complete | I I I I I I I I I I I I I I I I I I I |
| Menu V Details | Cancel Restrict Access | |
| | Delete | |
| General | Run Workflow | |
| Subject* | Copy Record Link | |
| Referral has been Allocated | | |
| Description | | |
| B I U S x₂ x² ✓ I _x Styles - Format - Font | ≟ ∷ ⊕ ⊕)) E ± ± ≡ ∞ ∞ ℙ ⊡ ⊞ ≣ ⊕ Ω ⊨ · Size · <u>A</u> · ⊠· <u>X</u> □ @ @ @ ← → Q, \\$ ₱ ♥ Q ω Source X | |
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| | | Characters (with HTML): 0/100000 |
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| javascreptivo d("An | | |



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 🗸 🔞 Se | ettings 🗸 🕲 😓 CareDirectorTest |
|--|--|
| 🔶 🖬 🗟 👶 🎝 : Case: Tom, TES | ST - (21/06/2022) [CAS-000001-0087] |
| TOM,TEST (ld: 444267) Person Record | Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 🔍 |
| Pronouns: Preferred Name: | In the second se |
| Menu 🗸 Timeline Details | |
| | ~ |
| | |
| Assignment Information | 2 |
| Case Status* | |
| Assign To Team | |
| Case Priority | |
| | Q |
| Responsible User | |
| | Q |
| Responsible Team * | |
| AMHP Coordinator | Q |
| Review Date | |
| | |
| | |



CAREDIRECTOR SI/ OT TEAM

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

| 人 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸 | 🕀 🛃 🛠 边 🌅 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: | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | |
| ~ | |
| | |
| Assignment Information | |
| Case Status* | |
| Assign To Team X | |
| Case Priority | |
| Q | |
| Responsible User | |
| Q | |
| Responsible Team * | |
| AMHP Coordinator Q | |
| Review Date | |
| | |
| | - |



CAREDIRECTOR SI/ OT TEAM

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

| 🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 | Settings 🗸 | ${f \Phi}$ 🚉 🛠 🕒 🌅 CareDirectorTest |
|---------------------------------------|---|--|
| 🔶 🖬 🖹 👶 🎝 : Case: Tom, T | EST - (21/06/2022) [CAS-000001-0087] | ? |
| TOM,TEST (Id: 444267) Person Record | ırn: 21/ | 06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 💛 |
| Pronouns: Preferred Name: | Case Statuses Enter your search criteria. | I I I I I I I I I I I I I I I I I I I |
| Menu V Timeline Details | Look Social Care Case Status Lookup View 🗸 | |
| | Search for records Q 3 | |
| Assignment Information | Name L Code Gov C □ Awaiting allocation (unscheduled revi ^ | |
| Case Status* | Closed | |
| Assign To Team | Closed & Logged As Enquiry | |
| Case Priority | Closed as a Contact | |
| | Closed Under Review | |
| Responsible User | Closure Request Rejected | |
| | Closure Requested | |
| | · · · · · · · · · · · · · · · · · · · | |
| Responsible Team * | Image 1 < | |
| AMHP Coordinator | | |
| Review Date | OK Close | |
| | | |



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.**

| Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸 | eve mouse to top of screen or press [1] |
|---|--|
| ← 🖬 🛱 & I₂ : Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] | <u>(</u> |
| TOM,TEST (Id: 444267) Person Record | Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸 |
| Pronouns: Preferred Name: | In the second se |
| Menu V Timeline Details | |
| Assignment Information | |
| Case Status* | Close Date* |
| Closed X | Q 03/10/2022 🛍 13:43 🛇 |
| Case Priority | Closure Reason* |
| | All Work Completed X Q |
| Responsible User | Closure Accepted By* |
| | Q Scott Simpson X Q |
| Responsible Team * | Archive Date* |
| AMHP Coordinator | Q 28/10/2022 🛍 |
| Review Date | |
| | |
| Last Assigned to Team Date | |
| 20/09/2022 | |
| | |
| Other Information | |
| Re-Referral | Non-Migrated Worker Name |

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**.

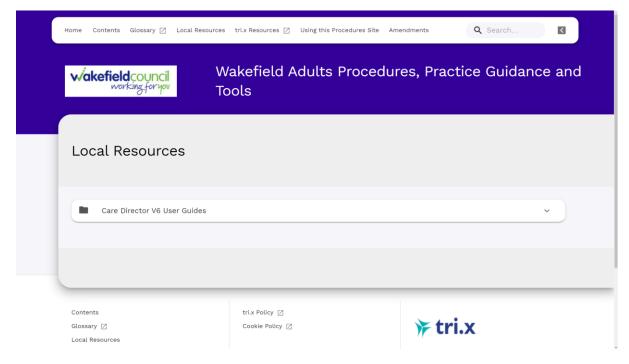


Further CareDirector Guidance

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