



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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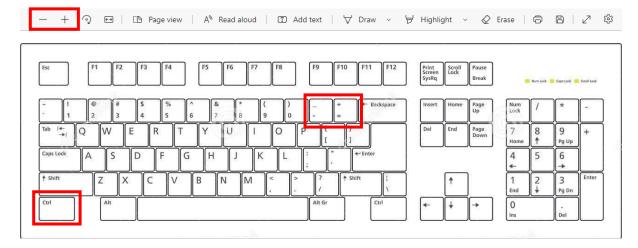
Guide Information

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 | 🛱 🛱 | 🖉 🕸



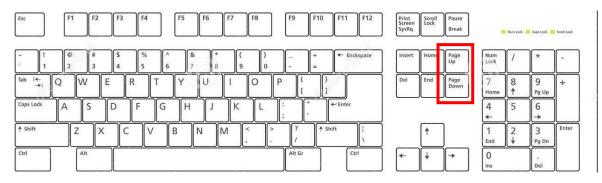
4. For auditory assistance, select Read Aloud from the toolbar.

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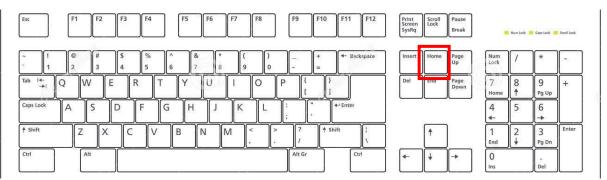
5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

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	CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING	vakefieldcouncil working for you	
	Contents		
	Guide Information		
	Before Live Access		
	Dashboard	4	
	How to search for a Service Uar	5	
	How to search for a Service User How to upload Attachments	6	
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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.



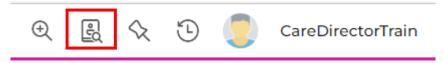
7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.





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
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Filter By	ост	2022						
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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
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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.**

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🔶 🖬 🗟 🖨 👶 : 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*							
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		Responsible Team*					×
Relationship Details _{Start Date} *							×Q
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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**.

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🗧 🖬 🗟 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	

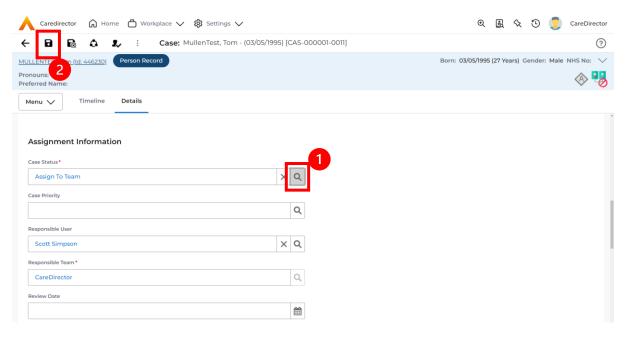
6. When a **Responsible User** has been chosen, select **Save** from the toolbar. This will send the **Case** to their **Dashboard** and **System Views**.

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 🔀

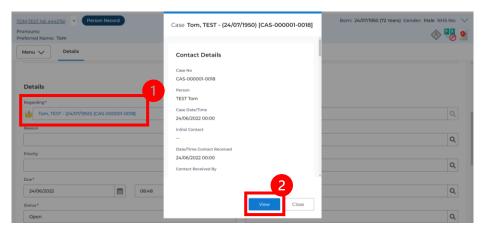


How to tell if an Activity is linked to a Case or Person Record

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.

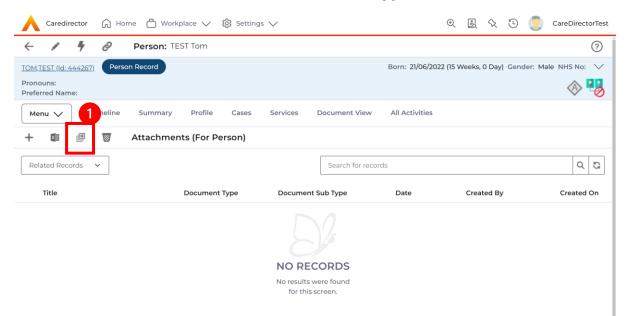


How to upload multiple attachments

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
--------	-----

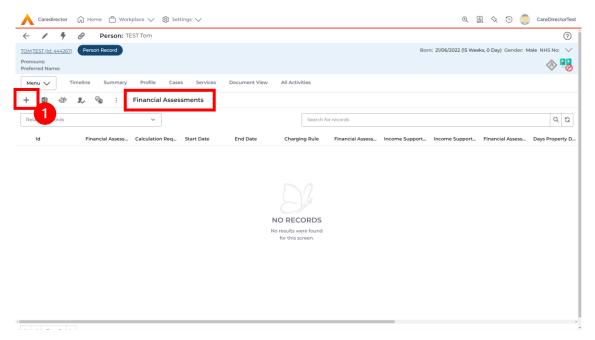


Where to find Financial Assessments

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.

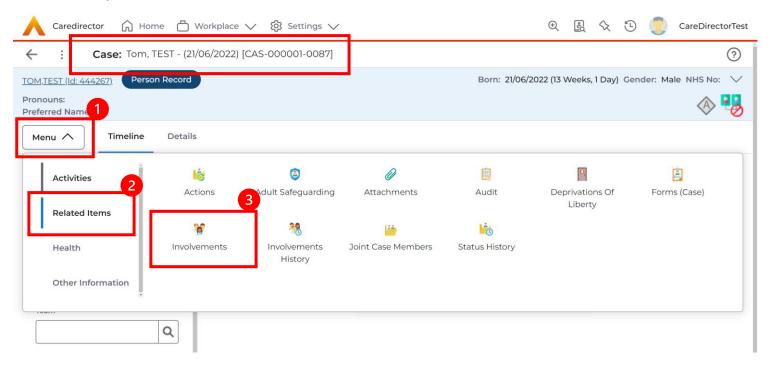




How to close a Case

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.





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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.

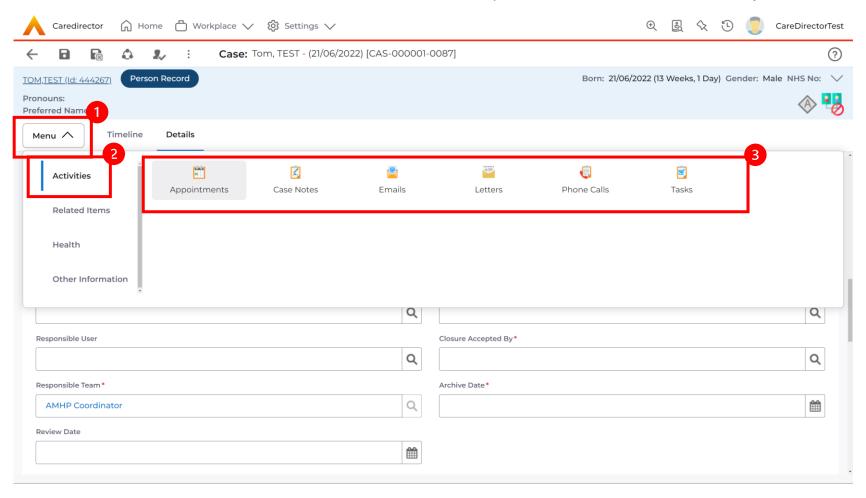
enu V	ase Involvement with	in Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by S	Scott Simpson o
General			
ase*		Responsible Team •	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	Q
erson*		Involvement Priority	
TEST Tom	Q		Q
nvolvement Member*		Involvement Status	
Community 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	
		Characters (with HTML): 0/100000
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.

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← 🖬 🕼 👶 🎩 : 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	
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Assignment Information	
Case Status*	
Assign To Team X	
Case Priority	
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Responsible User	
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Responsible Team *	
AMHP Coordinator Q	
Review Date	
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CAREDIRECTOR SI/ OT TEAM

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

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🔶 🖬 🖹 👶 🎝 : 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.**

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← 🖬 🛱 & 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**.

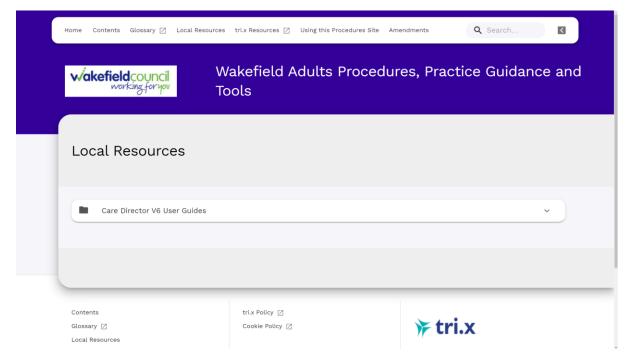


Further CareDirector Guidance

- 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