



# Transitions Team

## V1.0

**Document** CareDirector Transitions Team.  
**Purpose** Transitions Team daily tasks on CareDirector.  
**Version** V1.0  
**Owner** ICT Business Transformation Team  
**Last Updated** 11/11/2022

## Contents

Guide Information.....	4
Before Live Access... ..	4
Guide Navigation .....	4
How to search for a Service User.....	6
Updating Person Details .....	7
How to add relationships .....	8
How to Enter Date of Death.....	10
Edit Person Record (Address) .....	11
How to add a Contact.....	12
How to find a linked Contact .....	14
How to add an Activity to a Contact.....	15
How to link a Contact to a Person Record .....	16
How to search for a Case.....	18
How to create a Case .....	19
How to check the Case Status.....	20
How to change the Case Status .....	21
How to Allocate a Case to a Worker .....	22
How to send a Case to another team .....	24
How to add an Involvement (Secondary Allocation) .....	27
How to clone a Case.....	29
How to find Activities .....	31
How to input an Activity .....	33
How to change status to Complete (Re-activate Activities) .....	35
How to tell if an Activity is linked to a Case or Person Record.....	36
How to Allocate a new Activity to another team.....	37
How to Allocate an existing Activity to another team .....	39
How to Clone Activities .....	41
How to upload Attachments .....	42
How to upload multiple attachments .....	44
How to find a Form (Case) .....	46
How to add a Form .....	47
How to Allocate a Form .....	50

How to Clone a Form.....	52
How to reactivate a Closed Form.....	55
How to input Service Provisions.....	56
Where to find Service Provisions.....	56
How to Authorise a Service Provision.....	57
How to input Service Deliveries.....	58
How to Clone a Service Provision.....	60
How to End Service Provisions.....	62
How to close a Case.....	<b>Error! Bookmark not defined.</b>
Ending Involvements.....	<b>Error! Bookmark not defined.</b>
Close an Open Activity.....	66
Closing a Case.....	69
Further CareDirector Guidance.....	73

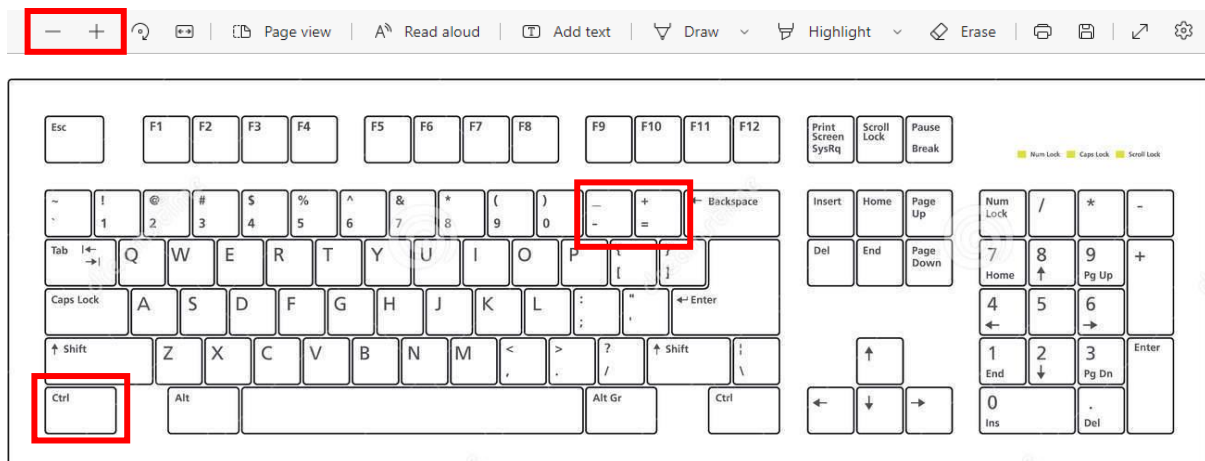
## Guide Information

### Before Live Access...

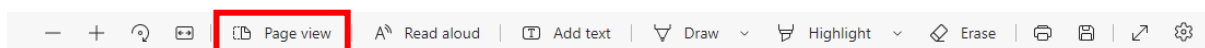
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### Guide Navigation

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

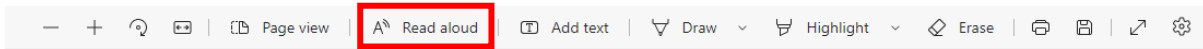


3. To put pages next to one another, select the **Page View** icon on the toolbar.

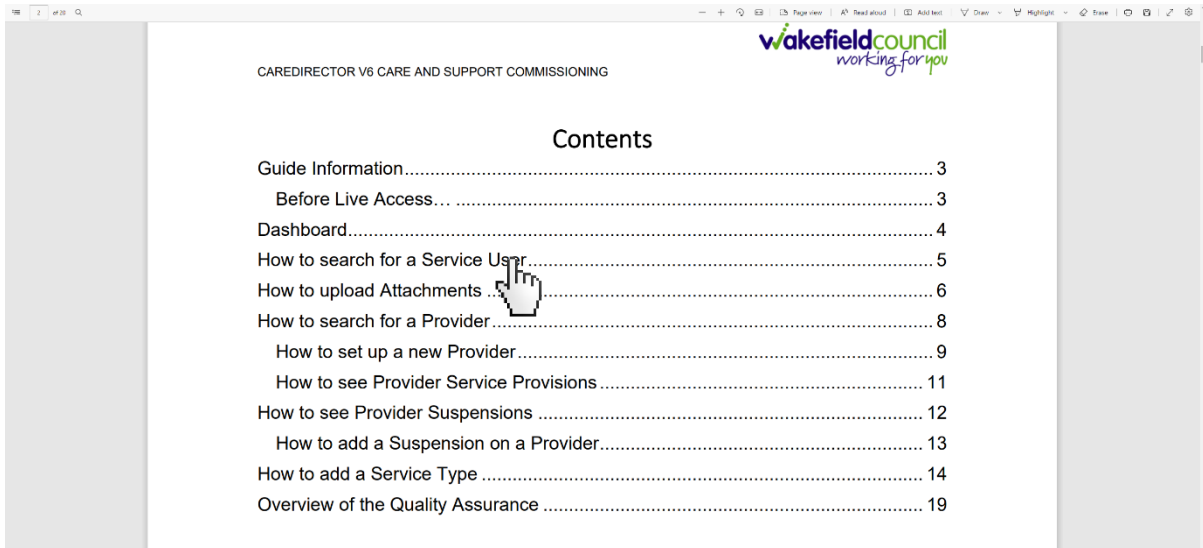




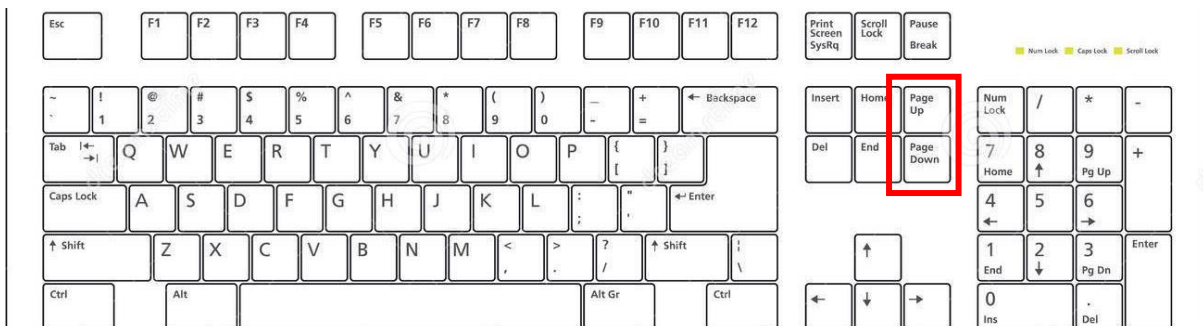
4. For auditory assistance, select **Read Aloud** from the toolbar.



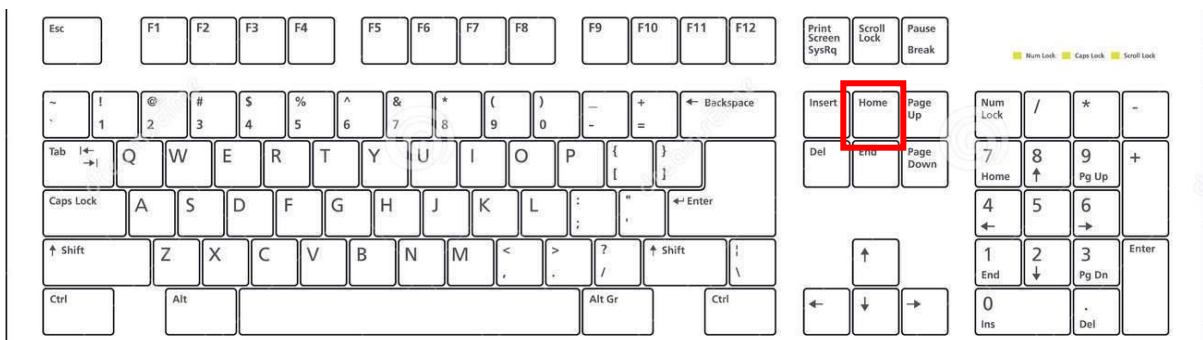
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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

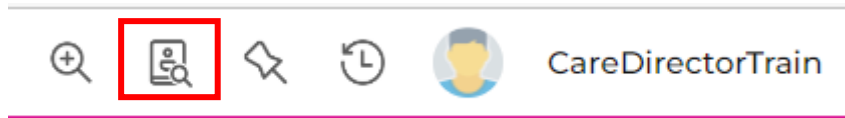


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## How to search for a Service User

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



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

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

## Updating Person Details

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

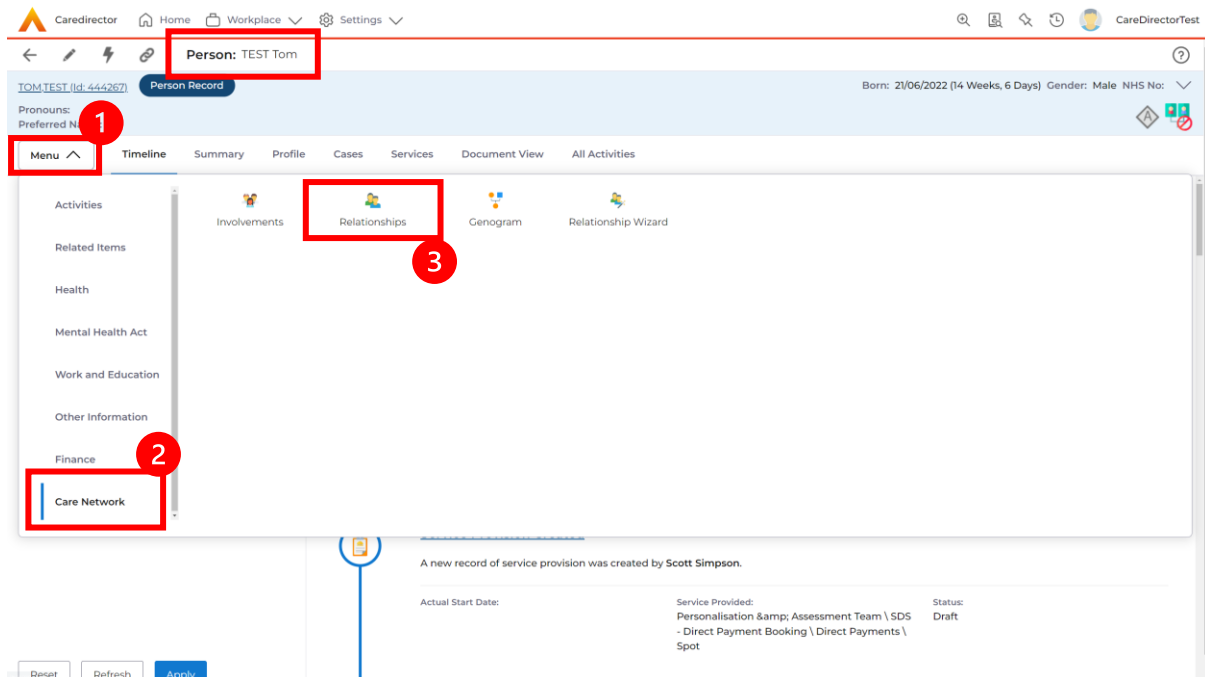
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for 'OCT 2022' and 'SEP 2022', including 'Form (Case) Created',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

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

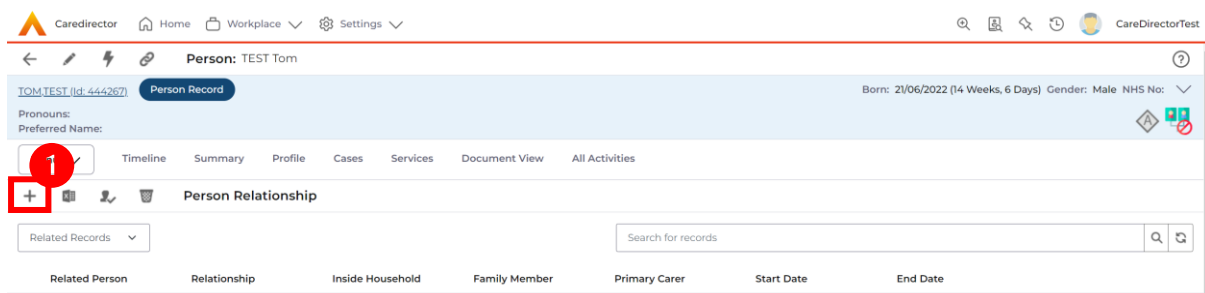
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page shows a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no NHS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

## How to add relationships

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



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



3. Inside this section:

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

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

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

**Details**

**Relationship to Other Person**

Primary Person\*  
 TEST Tom

is a\*  
 Brother

To\*  
 Tom MullenTest

**Reciprocal Relationship**

Person  
 Tom MullenTest

is a\*  
 Brother

To  
 TEST Tom

**Relationship Details**

Start Date\*  
 03/10/2022

Responsible Team\*  
 CareDirectorTest

End Date

Description

**Nature of Relationship to Primary Person**

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

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

## How to Enter Date of Death

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

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

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

## Edit Person Record (Address)

1. Locate the **Person Record**. Once inside, select the **Edit** button on the toolbar (pencil icon).

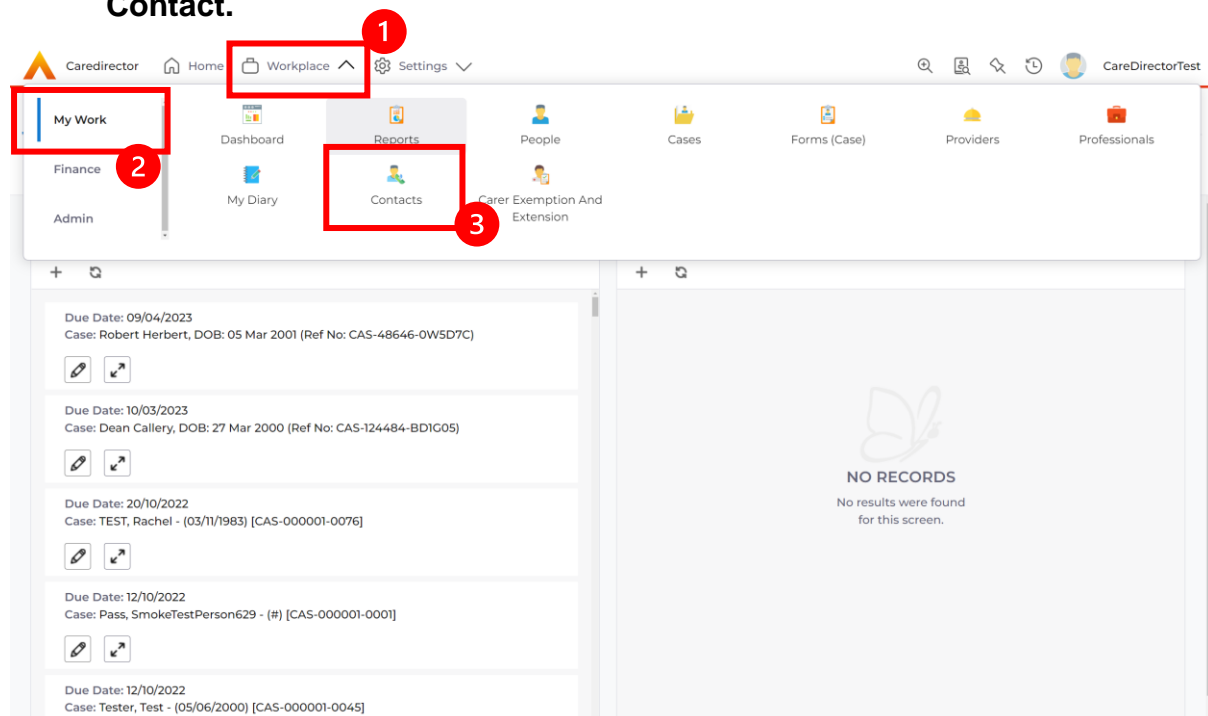
The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'CareDirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Person: TEST Tom' and 'TOM TEST (Id: 444267)'. Below this, there are tabs for 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is active, showing a vertical timeline with three events: 'Service Provision Created' in October 2022, 'Task Created' in September 2022, and another 'Service Provision Created' in September 2022. Each event includes details like 'Actual Start Date', 'Service Provided', 'Responsible Team', 'Responsible User', and 'Subject'. The 'Edit' button (pencil icon) in the top toolbar is highlighted with a red box and a circled '1'.

2. When the **Person** creation screen is open, scroll down to the **Address** section and enter the updated address. Then select **Save and Return to Previous Page**.

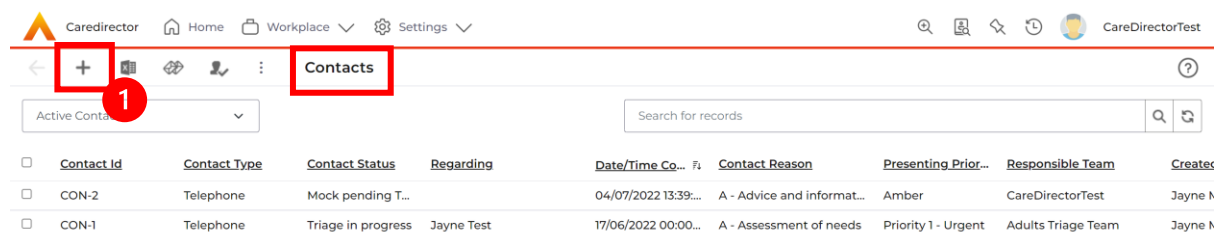
The screenshot shows the 'Address' section of the 'Person Record' page. The 'Address' section is highlighted with a red box. The form contains the following fields: 'Start Date of Address' (with a calendar icon), 'Address Type\*' (with a dropdown menu showing 'Primary'), 'Property Name', 'Property No.', 'Street', 'Village/District', 'Town/City', 'County', 'Property Type', 'UPRN', 'Borough', 'Ward', 'Country', 'Accommodation Status' (with a dropdown menu), 'Accommodation Type' (with a search icon), and 'Lives Alone'.

## How to add a Contact

1. A **Referrer** will **Contact** Wakefield Council to issue a new **Case**. This **Contact** is a simple capture of a **Case** without a **Service User** being on the system. This will be **Triaged** into a **Service User** and **Case** onto CareDirector, or it will be **Closed** before this.
2. To create this **Contact** select **Workplace**. Then select **My Work** and **Contact**.



3. From this screen, select either an existing **Contact** or create a new one by selecting **Create New Record** from the toolbar.





- From the **Contact** creation screen, if later this **Contact** becomes **Triaged**, and the **Service User** is created into CareDirector then the **Regarding** field can be linked to that person. Once the information has been entered, select **Save** from the toolbar.

**Contact Information**

Contact Id\*

Regarding

Date/Time Contact Received\*

Responsible Team\*

Responsible User

Contact Type\*

**Contact Source**

Contact Source

Contact Made By

Contact Made By (Free text)

**Contact Details**

Contact Reason\*

Presenting Priority\*

Presenting Need\*

Additional Information

**Contact Status and Outcomes**

Contact Status\*

Contact Outcome

Priority Of Referral

Route of Access

Other Actions

Date/Time Contact Assigned

Contact Summary

## How to find a linked Contact

1. Locate the **Person Record** and select **Menu, Related Items** and then **Contacts**.

The screenshot shows the Caredirector interface for a person record. The header bar includes navigation icons and the text 'Person: TEST Tom'. Below the header, there's a section for 'TOM.TEST (Id: 444267)' with a 'Person Record' tab. The main content area is divided into a left sidebar and a main grid. The sidebar has a 'Menu' button (circled 1) and a 'Related Items' option (circled 2). The main grid contains various categories like 'Addresses', 'Alerts And Hazards', 'Allegations (Alleged Abuser)', 'Allegations (Alleged Victim)', 'Attachments', 'Audit', 'Complaints And Feedback', 'Forms (Person)', 'Primary Support Reasons', and 'Subject Access Requests'. The 'Contacts' option in the 'Allegations (Alleged Victim)' category is circled 3.

2. Once opened, it will show the linked **Contact** for that **Person Record**.

The screenshot shows the 'Contacts' section of the Caredirector interface. The header bar includes navigation icons and the text 'Person: TEST Tom'. Below the header, there's a section for 'TOM.TEST (Id: 444267)' with a 'Person Record' tab. The main content area is divided into a left sidebar and a main grid. The sidebar has a 'Menu' button and a 'Related Items' option. The main grid contains various categories like 'Addresses', 'Alerts And Hazards', 'Allegations (Alleged Abuser)', 'Allegations (Alleged Victim)', 'Attachments', 'Audit', 'Complaints And Feedback', 'Forms (Person)', 'Primary Support Reasons', and 'Subject Access Requests'. The 'Contacts' option in the 'Allegations (Alleged Victim)' category is circled 3.

Contact Id	Contact Type	Contact Status	Regarding	Date/Time Contact R...	Contact Reason
CON-2	Telephone	Mock pending Triage	TEST Tom	04/07/2022 13:39:00	A - Advice and ir

## How to add an Activity to a Contact

1. Locate the **Contact**,
  - a. Unlinked Contact: **Workplace, My Work** and then select **Contacts**.
  - b. Linked Contact: **Menu, Related Items, Contacts**.
2. Select **Menu**, then **Activities** and select the relevant **Activity**.

The screenshot shows the Caredirector interface for a 'Person Record' of 'TEST Tom'. The breadcrumb trail is highlighted in red: 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - ...'. Below this, the 'Menu' button is highlighted with a red box and a '1' next to it. In the 'Related Items' section, the 'Activities' option is highlighted with a red box and a '2' next to it. Other options in the 'Related Items' section include Appointments, Case Notes, Emails, Letters, Phone Calls, and Tasks. Below the 'Related Items' section, there are input fields for 'Regarding' (TEST Tom), 'Responsible User' (Jayne Mullen), 'Date/Time Contact Received\*' (04/07/2022, 13:39), and 'Contact Type\*' (Telephone).

3. Once selected, **Create New Record** on the toolbar.

The screenshot shows the Caredirector interface for a 'Person Record' of 'TEST Tom'. The breadcrumb trail is 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - Family/Friend/Neighbour'. Below this, the 'Menu' button is visible. In the toolbar, the '+' icon is highlighted with a red box and a '1' next to it. Below the toolbar, there are input fields for 'Related Records' and 'Search for records'. At the bottom, there is a table with columns: Subject, Due, Status, Regarding, and Reason.

4. When finished, select **Save**.

## How to link a Contact to a Person Record

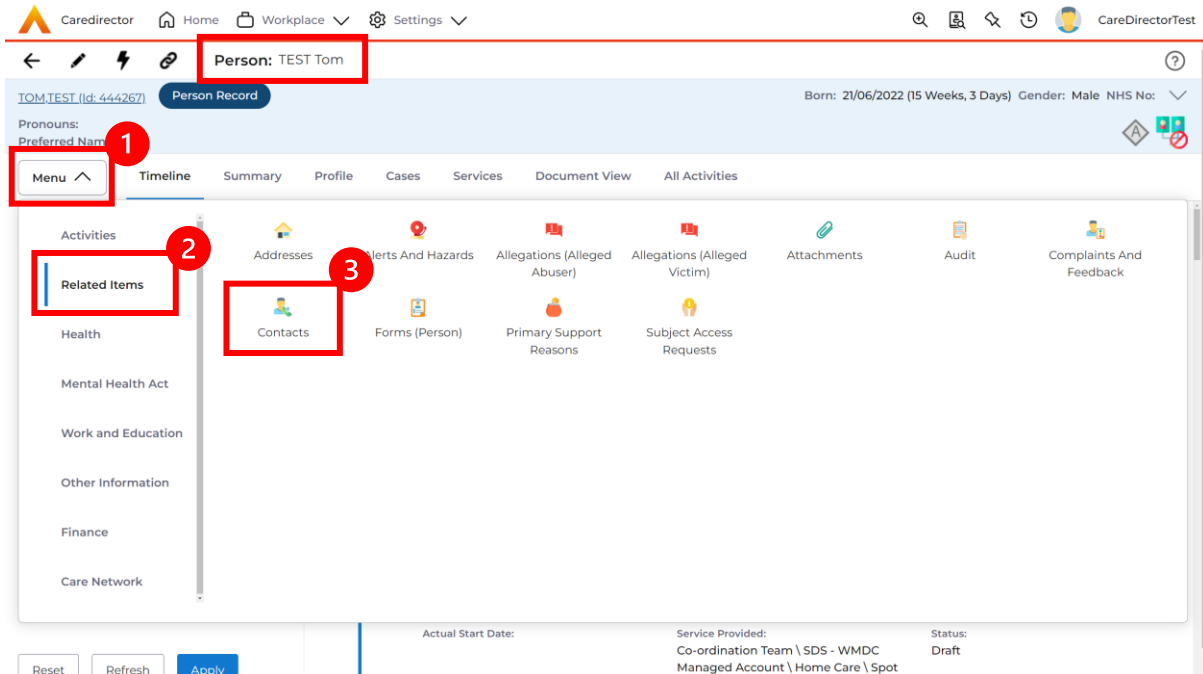
1. A **Contact** can be linked to a **Service User** later when details become known, and they are created into **CareDirector**.
2. After the **Service User** has been created onto the system and the **Contact** is triaged. Locate the **Contact** and under **Regarding** find the created **Service User** using the **Lookup** function.

The screenshot shows the 'Contact Information' section of a CareDirector record. The 'Regarding' field is highlighted with a red box and a '1' in a red circle. Other fields include 'Contact Id' (CON-2), 'Responsible Team' (CareDirectorTest), 'Responsible User' (Jayne Mullen), 'Date/Time Contact Received' (04/07/2022, 13:39), and 'Contact Type' (Telephone). The 'Contact Source' is 'Individuals - Family/Friend/Neighbour' and 'Contact Made By' is 'Mr Smith (neighbour)'.

3. Scroll down until the field **Is this Person/ Group aware of the Contact?** is visible to change to the relevant option.

The screenshot shows the 'Contact Source' and 'Contact Made By' fields. Below these, a yellow warning banner states 'Some data is not correct. Please review the data in the Form.' The 'Is the Person/Group aware of the Contact?' field is highlighted with a red box and a '1' in a red circle. Other fields include 'Contact Made By' (empty), 'Is Parent(s)/Carer(s) aware of this Contact?' (Yes), and 'Is N.O.I./Carer aware of this Contact?' (Yes).

4. This can be now found in the **Person Record** under **Menu, Related Items** and select **Contact**.



## How to search for a Case

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

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number 1. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (15 Weeks, 0 Day)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is highlighted with a red box. The main content area shows a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' and 'Service Provision Created', both created by Scott Simpson.

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

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number 1. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is highlighted with a red box. Below the tab, a table of related records is shown, with the first two rows highlighted by a red box and a red circle containing the number 2.

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

## How to create a Case

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

Person: Tom MullenTest

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name:

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

+ [Create New Record]

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

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
<input type="checkbox"/>	CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
<input type="checkbox"/>	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**.

Case: New

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name:

Details

**Contact Details**

Case No \* [input]

Person \* Tom MullenTest [dropdown] [X] [search icon]

Case Date/Time \* 07/10/2022 [calendar icon] 09:00 [clock icon]

Initial Contact [input] [search icon]

Date/Time Contact Received \* 06/10/2022 [calendar icon] 11:00 [clock icon]

Contact Received By \* Scott Simpson [dropdown] [X] [search icon]

Contact Reason \* A - Adult Safeguarding [dropdown] [X] [search icon]

Presenting Priority [input] [search icon]

Additional Information [input]

Referral Reason [input]

## 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**.

Person: TEST Tom

Person Record

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

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

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

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.**

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

Person Record

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

Menu Timeline **Details**

**Assignment Information**

Case Status \*  
Assign To Team

Case Priority

Responsible User

Responsible Team \*  
AMHP Coordinator

Review Date

Last Assigned to Team Date  
20/09/2022



## How to change the Case Status

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

The screenshot shows the 'Person Record' page for 'TOM.TEST (Id: 444267)'. The 'Details' tab is selected. Under 'Assignment Information', the 'Case Status' field is currently set to 'Assign To Team'. A red box with a '1' callout highlights the 'Details' tab, and another red box with a '2' callout highlights the magnifying glass icon next to the 'Case Status' field.

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

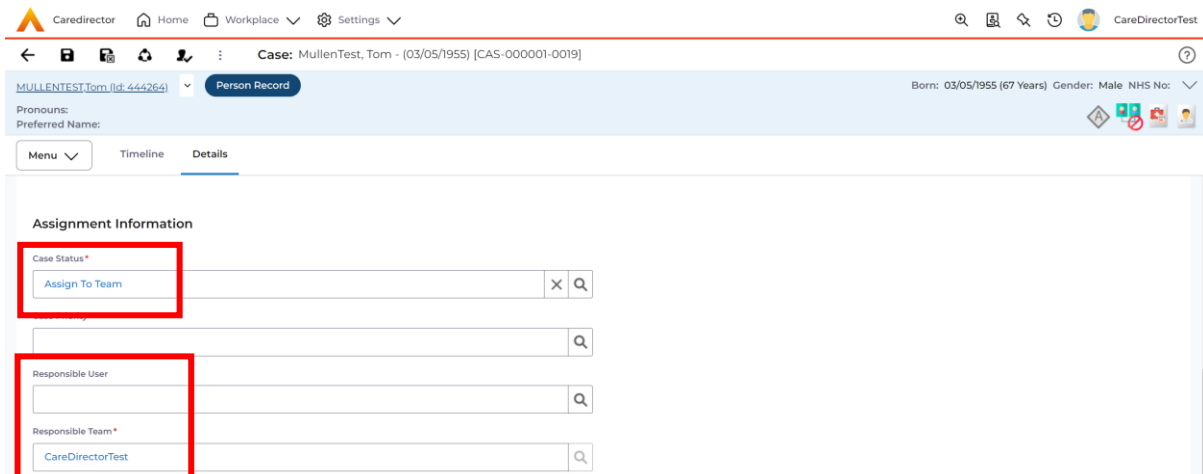
The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search criteria section is highlighted with a red box and a '1' callout. The dialog box contains a table of case status options:

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

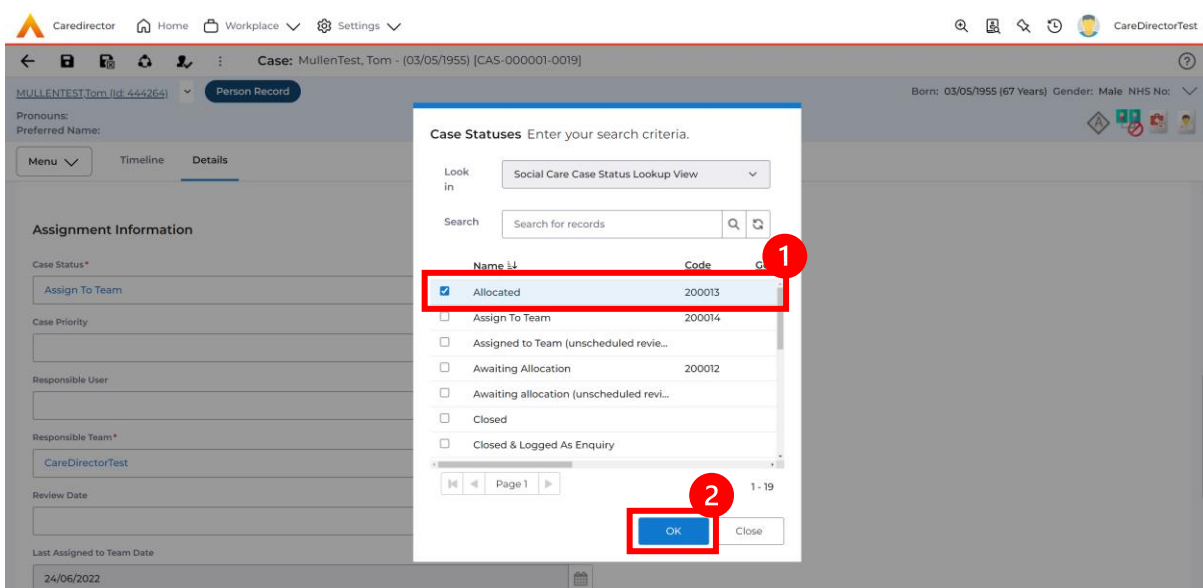
The 'OK' button is highlighted with a red box and a '2' callout.

## How to Allocate a Case to a Worker

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



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



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

Responsible User\*

🔍

The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case details for 'MullenTest, Tom - (03/05/1955) [CAS-000001-0019]' are visible. The 'Assignment Information' section is active, showing 'Case Status' as 'Allocated' and 'Responsible User' as a dropdown menu. A 'System Users' dialog box is open, allowing the user to search for a responsible user. The dialog has a search bar (1), a list of users (2), and an 'OK' button (3). The background shows the 'Assignment Information' section with the 'Responsible User' field highlighted.

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

The screenshot shows the CareDirector interface. The 'Assignment Information' section is active, showing 'Case Status' as 'Allocated', 'Case Priority' as an empty field, 'Responsible User' as 'Scott Simpson', 'Responsible Team' as 'CareDirectorTest', and 'Review Date' as an empty field. The 'Save' button in the toolbar is highlighted with a red box and a '1'. The background shows the 'Assignment Information' section with the 'Responsible User' field highlighted.

## 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**.

Caredirector Home Workplace Settings Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]

MULLENTEST, Tom (Id: 446230) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: [dropdown]

Menu Timeline Details

### Assignment Information

Case Status \*  
 ✕ 🔍 **1**

Case Priority  
 🔍

Responsible User  
 ✕ 🔍

Responsible Team \*  
 🔍

Review Date  
 📅

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 Workplace Settings Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]

MULLENTEST, Tom (Id: 446230) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: [dropdown]

Menu Timeline Details

### Assignment Information

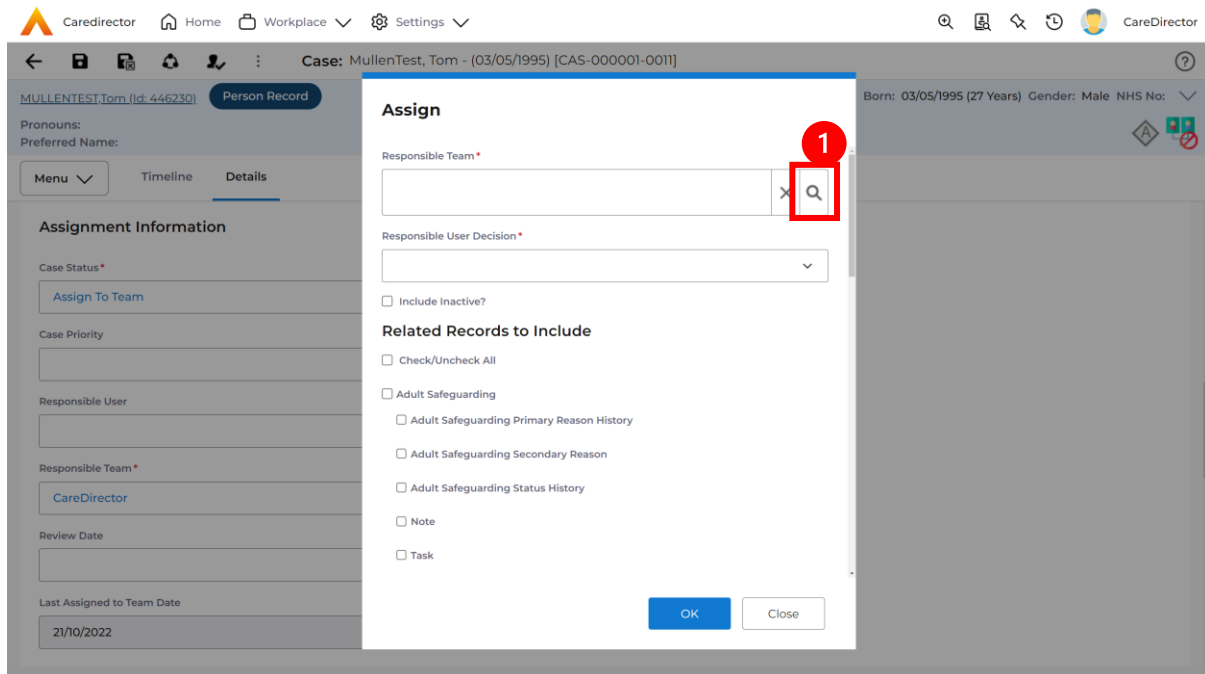
Case Status \*  
 ✕ 🔍

Case Priority  
 🔍

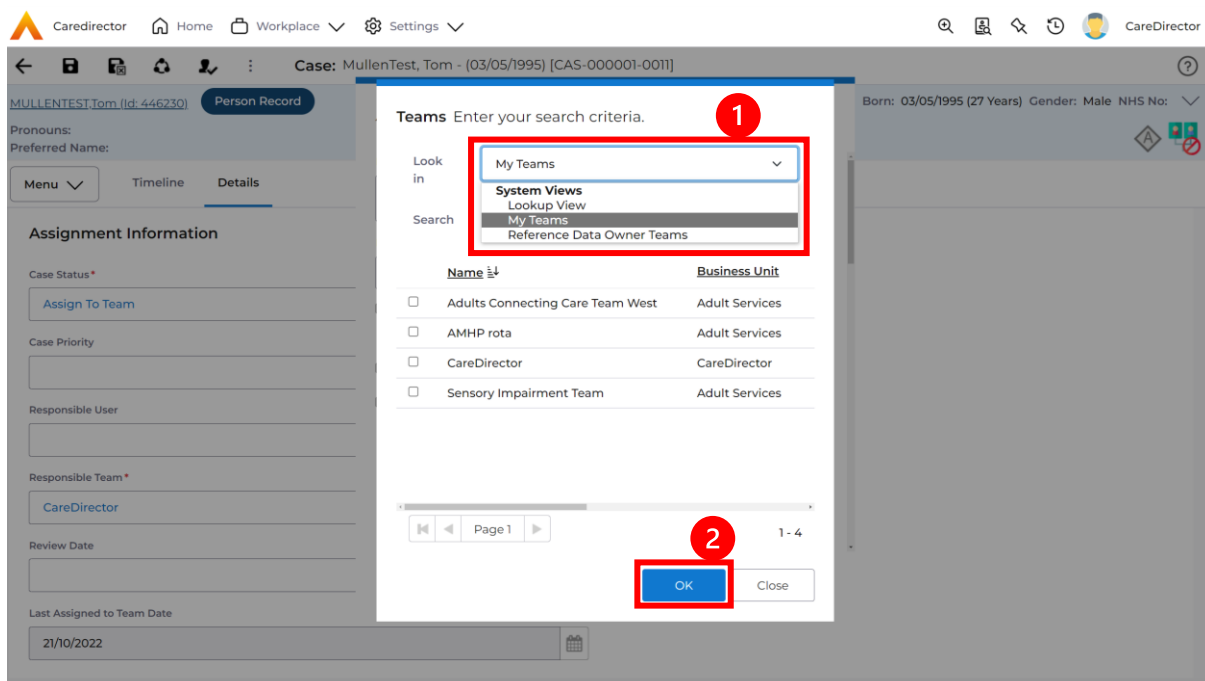
Responsible User  
 🔍

Responsible Team \*  
 🔍

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



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



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

The screenshot shows the CareDirector interface for a case named 'MullenTest, Tom'. A modal window titled 'Assign' is open, allowing for team and user assignment. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown menu is currently set to 'Do not change' and is highlighted with a red box. Below this, there are checkboxes for 'Include Inactive?' and 'Related Records to Include', with options for 'Check/Uncheck All', 'Adult Safeguarding', and various history types. The 'Responsible User' field in the background is also highlighted with a red box. The modal has 'OK' and 'Close' buttons at the bottom.

- 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.

## How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.
2. Select **Menu**, **Care Network** select **Involvements**.

3. Within this screen, select **Create New Record** on the toolbar.

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Community Occupatio...	31/08/2022	3
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	30
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	
<input type="checkbox"/>	Matt Davies	* Secondary Wor...		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	3

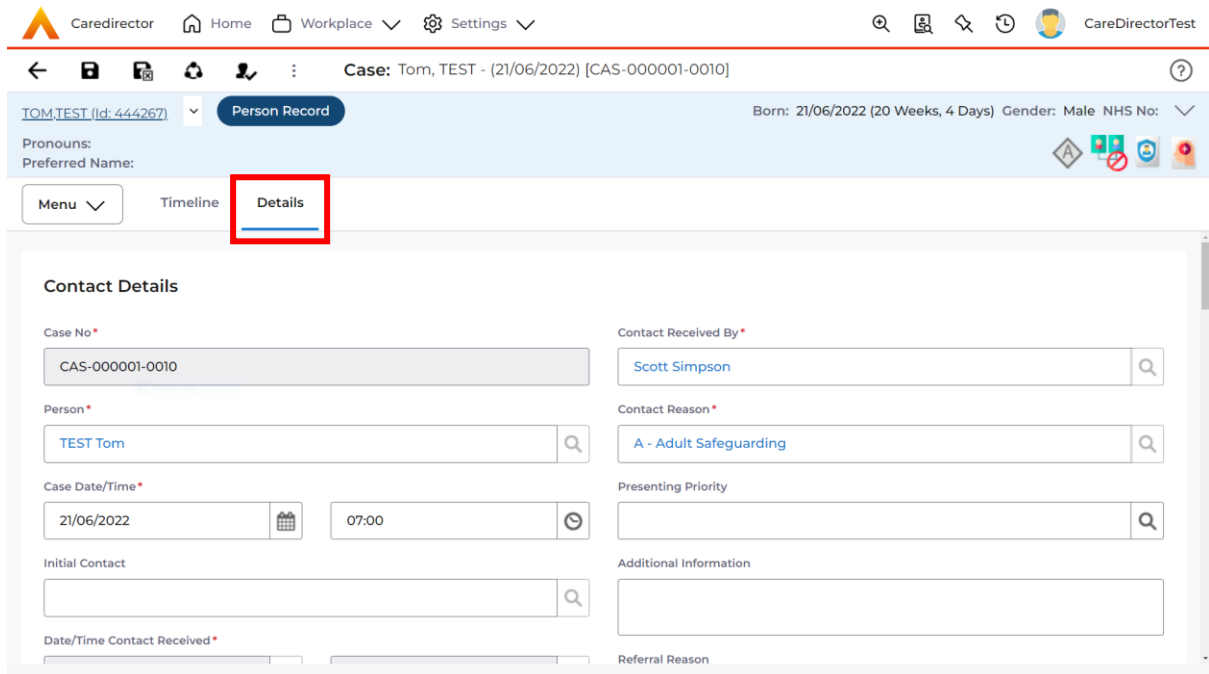
- Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save**.

The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a red circle containing the number '1', and it contains the text '\* Secondary Worker'. The 'Involvement Member' field is also highlighted with a red box and a red circle containing the number '2', and it contains the name 'Peter King'. Other fields include 'Case\*', 'Responsible Team\*', 'Person\*', 'Involvement Priority', 'Involvement Status', 'End Date', 'Start Date\*', 'Involvement End Reason', 'Involvement Reason', and 'Involvement Review Date'. The 'Case\*' field contains 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Responsible Team\*' field contains 'CareDirectorTest'. The 'Person\*' field contains 'TEST Tom'. The 'Involvement Status' field is empty. The 'End Date' field is empty. The 'Start Date\*' field contains '04/10/2022'. The 'Involvement End Reason' field is empty. The 'Involvement Reason' field is empty. The 'Involvement Review Date' field is empty. The 'Description' field is empty.

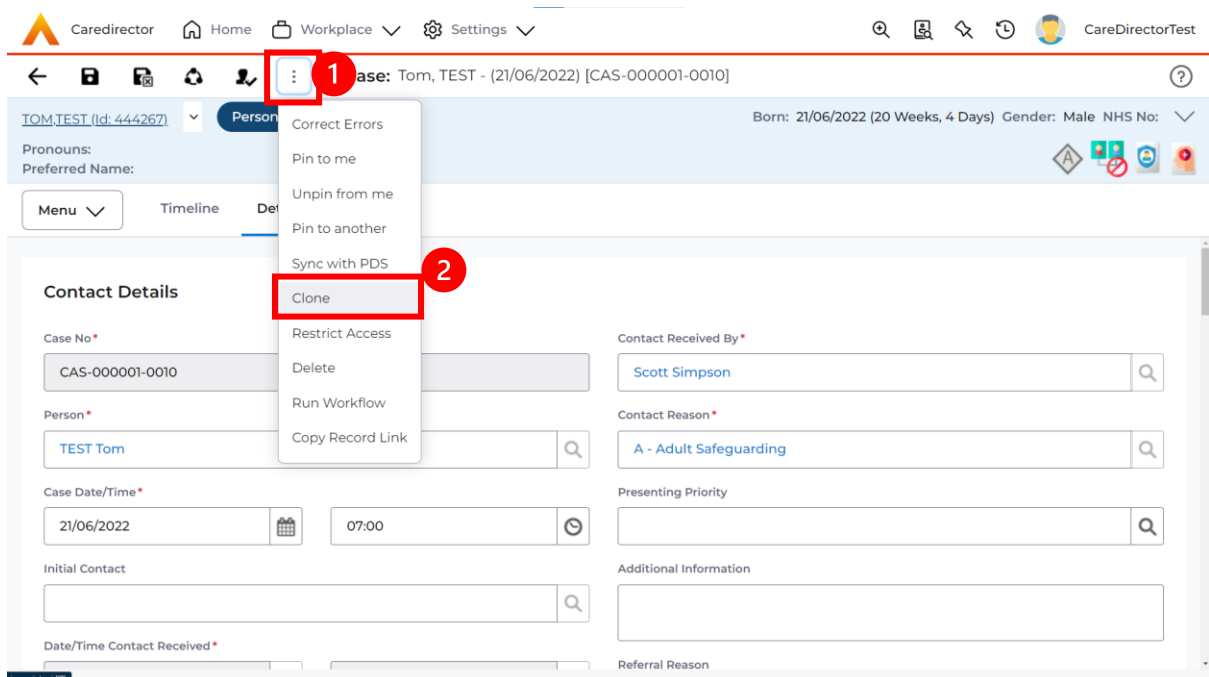


## How to clone a Case

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



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



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

Clone Social Care Case

1

Start Date/Time for Cloned Cases \*

12/11/2022

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

Page 1

1 - 1

3

Clone

Close

## How to find Activities

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

My Active Tasks/Notes

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

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

Person: Test Tom

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

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

All Activities

Keyword: [input field]

Activity Type: All [dropdown]

Date Type: Created Date [dropdown]

From: 02/10/2022 [calendar icon]

To: 01/11/2022 [calendar icon]

Actual End (From): [input field] [calendar icon]

Clear Filters | **Search**

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

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

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

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

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

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

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

## How to input an Activity

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

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

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

Pronouns: [dropdown]  
Preferred Name: [dropdown]

Menu ^

- Activities
- Appointments
- Case Notes
- Emails
- Letters
- Phone Calls
- Tasks
- Related Items
- Other information

Responsible User: [input field]

Responsible Team\*: AMHP Coordinator [input field]

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

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

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

Pronouns: [dropdown]  
Preferred Name: Tom

Menu v

+ [dropdown] [dropdown] [dropdown] Tasks

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

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

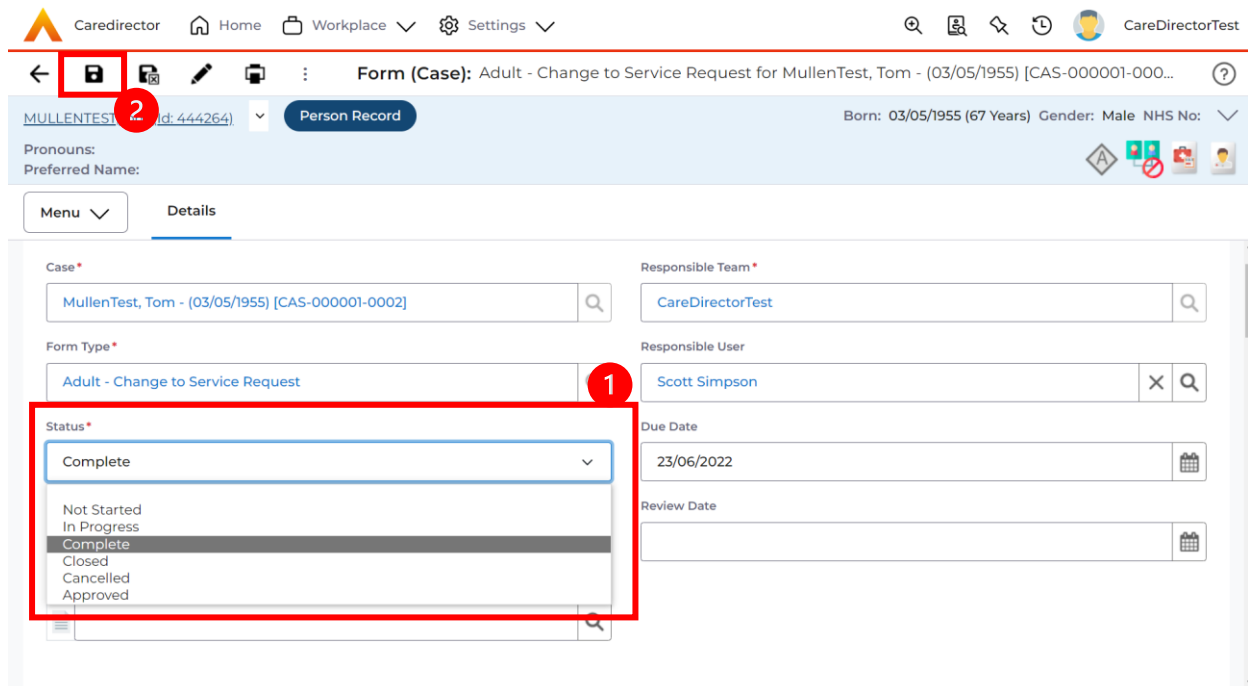
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the 'Case Note (For Case): New' form in the CareDirector system. The form includes several fields: Case, Reason, Priority, Date, Status, Responsible Team, Responsible User, Category, Sub-Category, and Outcome. The 'Responsible User' field is currently populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The top navigation bar shows 'Caredirector' and 'Home Workplace Settings' with a red circle containing the number '2' over the 'Caredirector' logo.

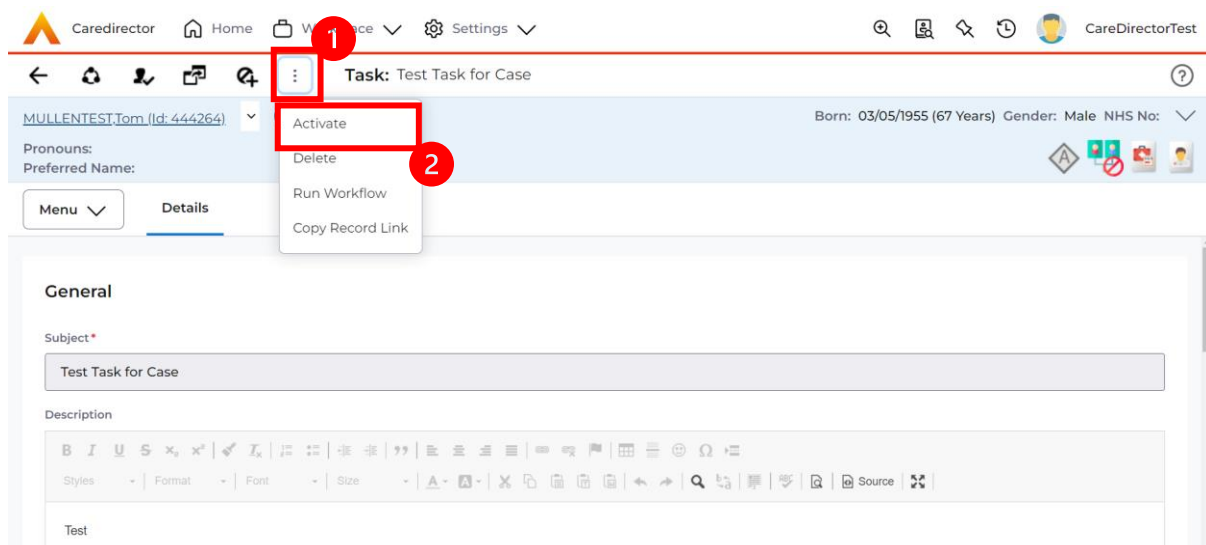
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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

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



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



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

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

The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, a task is selected: 'Task: CHC Funding Decision - Fully funded'. The user profile 'TOM.TEST (id: 444276)' is visible, along with 'Person Record' and 'Born: 24/07/1950 (72 Years) Gender: Male NHS No:'. The 'Details' tab is active, and the 'Regarding' field is highlighted with a red box and a red circle with the number 1. The 'Regarding' field contains a folder icon and the text 'Tom, TEST - (24/07/1950) [CAS-000001-0018]', which is also highlighted with a red box and a red circle with the number 2. Other fields include 'Reason', 'Priority', 'Due' (24/06/2022, 08:48), 'Status' (Open), 'Responsible Team' (CareDirectorTest), 'Responsible User', 'Category', 'Sub-Category', and 'Outcome'.

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

The screenshot shows the CareDirector interface with a 'View' dialog box open. The dialog box title is 'Case Tom, TEST - (24/07/1950) [CAS-000001-0018]'. It contains the following information: 'Contact Details', 'Case No' (CAS-000001-0018), 'Person' (TEST Tom), 'Case Date/Time' (24/06/2022 00:00), 'Initial Contact' (---), 'Date/Time Contact Received' (24/06/2022 00:00), and 'Contact Received By'. The 'View' button is highlighted with a red box and a red circle with the number 2. The background shows the 'Details' tab with the 'Regarding' field highlighted with a red box and a red circle with the number 1.



## How to Allocate a new Activity to another team

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

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

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

The screenshot shows the 'Task: New' form with a 'Teams' lookup modal open. The modal has three red annotations: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The modal title is 'Teams Enter your search criteria.' and it contains a search bar, a list of teams, and a table of results.

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

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

The screenshot shows the CareDirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom (Id: 446230)'. The 'Responsible User' field is highlighted with a red box and a '1' in a red circle, indicating the 'X' button to be clicked. The 'Regarding' field is also highlighted with a red box and a '2' in a red circle.

Details

Regarding\*  
MullenTest, Tom - (03/05/1995) [CAS-000001-001]

Reason  
Priority  
Due\*  
Status\*  
Open

Responsible Team\*  
Sensory Impairment Team

Responsible User  
Scott Simpson

Category  
Sub-Category  
Outcome

Contains Information Provided By A Third Party?  
 Yes  
 No

Is Case Note?  
 Yes  
 No

## How to Allocate an existing Activity to another team

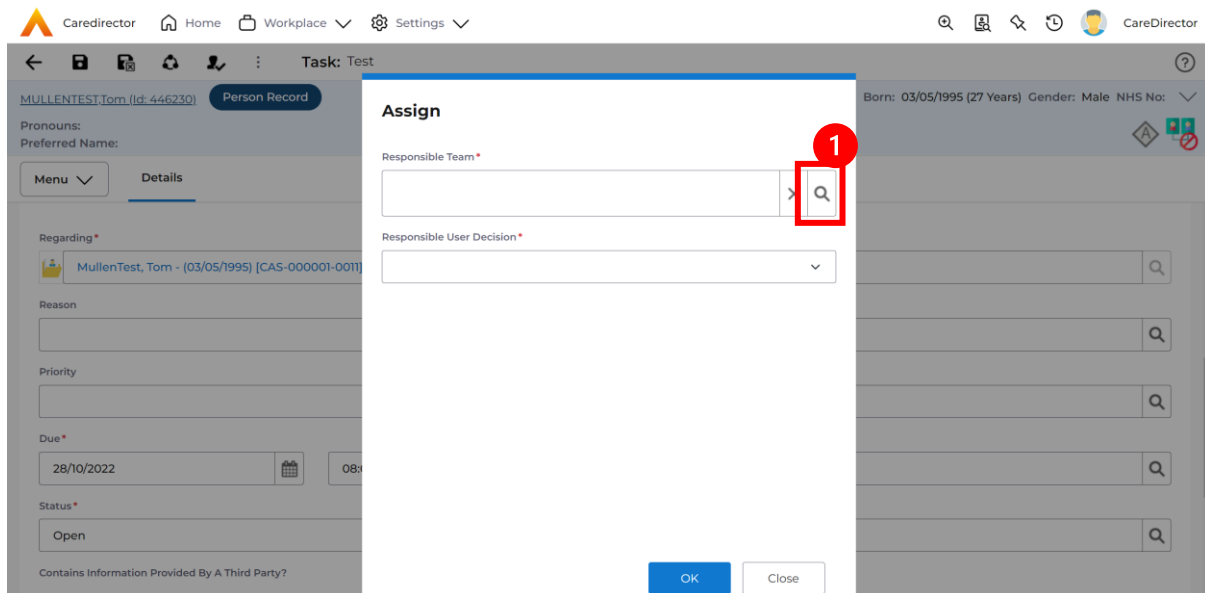
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The task is titled 'Task: Test' and is associated with 'MULLENTEST, Tom (Id: 446230)'. The 'Responsible Team' is 'Sensory Impairment Team' and the 'Responsible User' is 'Scott Simpson'. A red box highlights the 'X' button next to the user name, with a red circle containing the number '1' next to it. Other fields include 'Reason', 'Priority', 'Due' (28/10/2022), 'Status' (Open), and 'Outcome'.

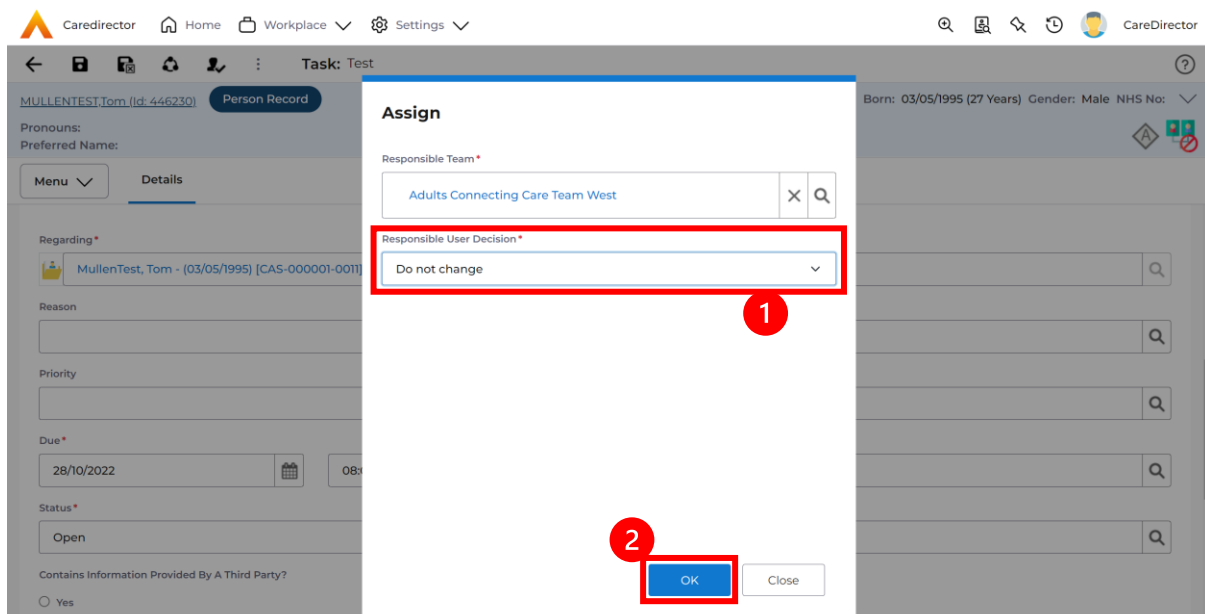
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same CareDirector interface as above, but with the 'Assign' button in the toolbar highlighted by a red box and a red circle containing the number '1'. The 'Responsible User' field is now empty, indicating that the user has been removed or is about to be replaced. The rest of the form remains the same.

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



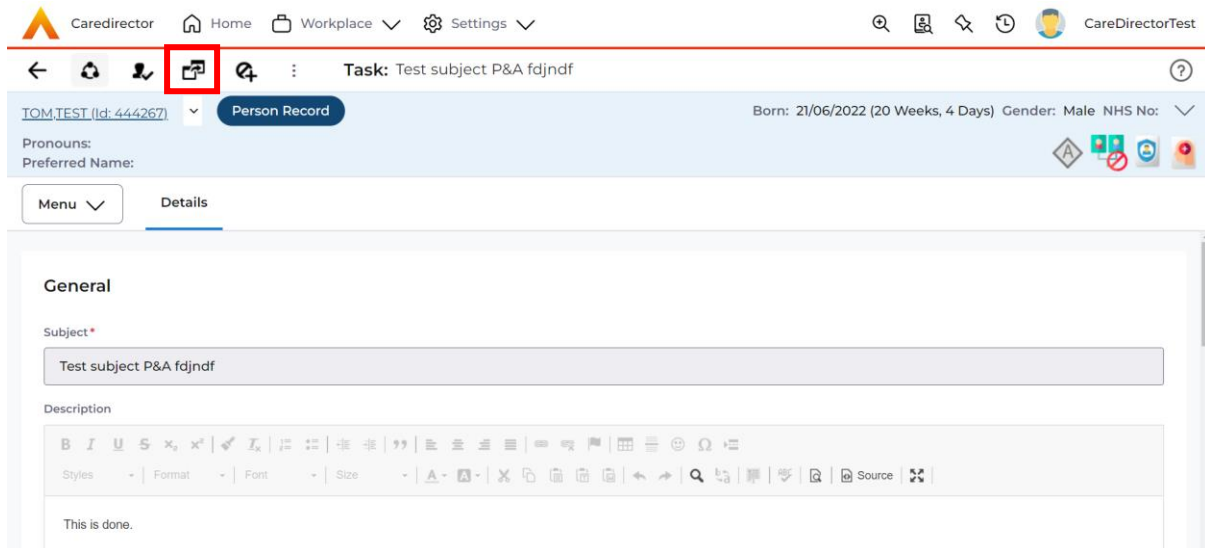
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



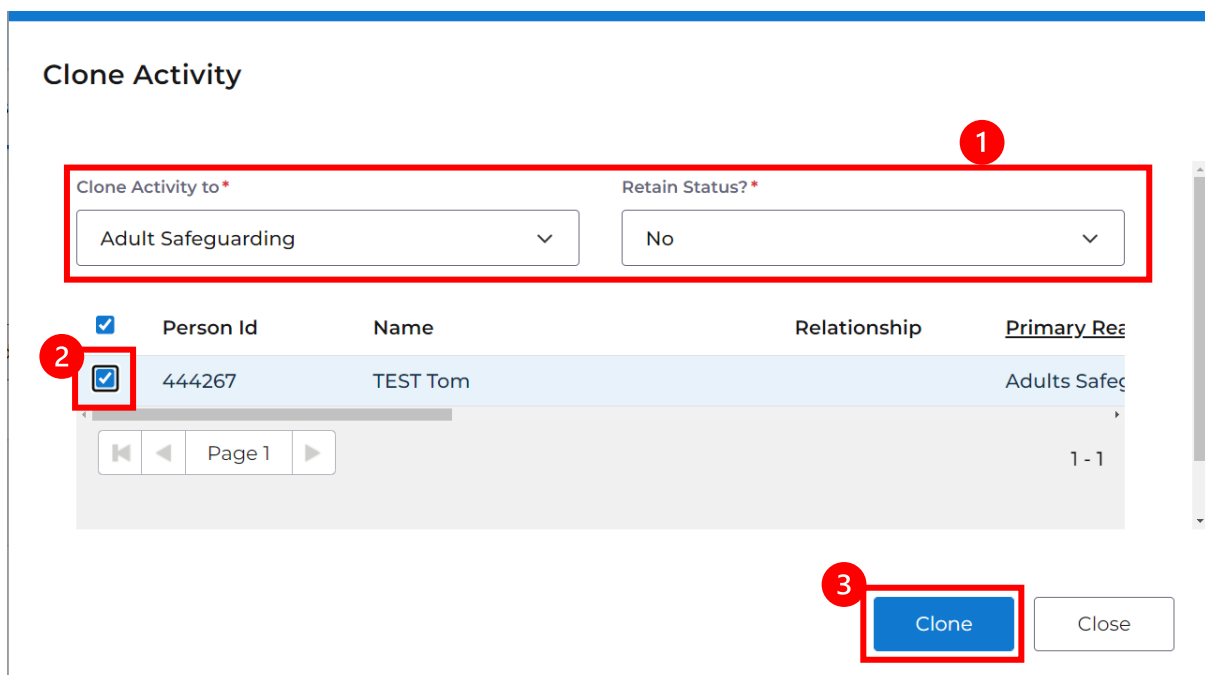
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

## How to Clone Activities

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



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



## How to upload Attachments

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

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail is 'Person: TEST Tom'. The main navigation menu is open, and 'Related Items' is selected. The 'Attachments' option is highlighted in the main content area.

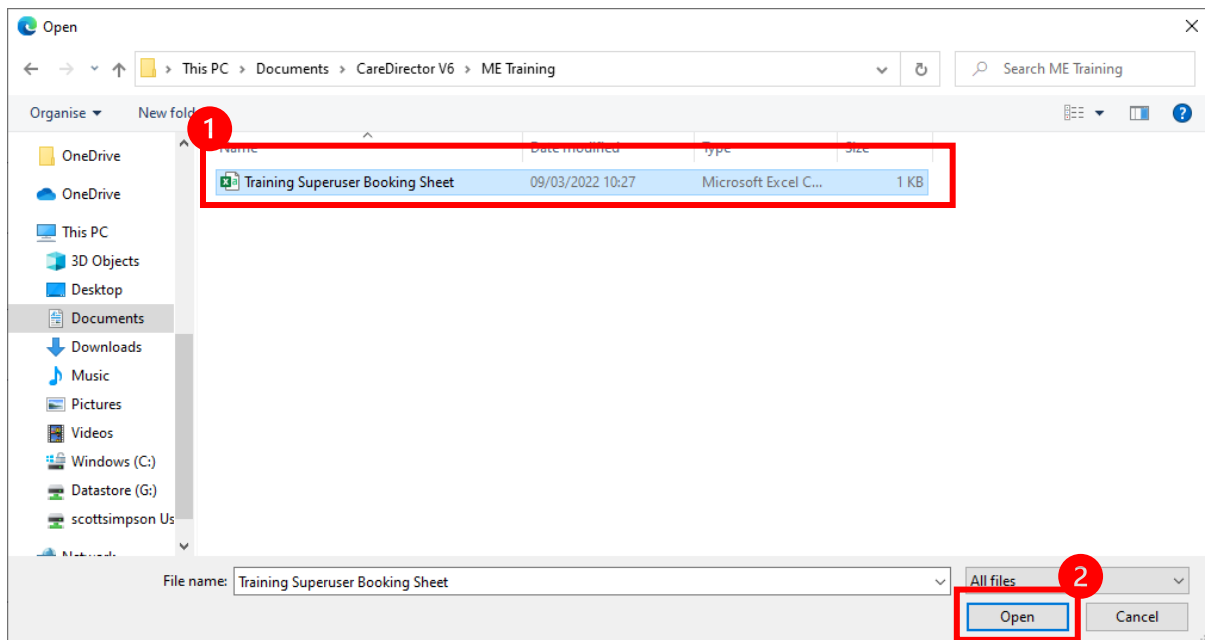
2. When opened, select the **Create New Record** from the toolbar.

The screenshot shows the 'Attachments (For Person)' screen. The toolbar at the top contains a '+ Create New Record' button, which is highlighted with a red box and the number 1. Below the toolbar is a search bar and a table with columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is currently empty, displaying a 'NO RECORDS' message.

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

The screenshot shows the 'Attachment (For Person): New' form in CareDirector. The 'File' field is highlighted with a red box and a red circle containing the number 1. The 'Browse' button is also highlighted with a red box. Other fields include 'Person' (TEST Tom), 'Responsible Team' (CareDirectorTest), 'Title' (Test Document Upload), 'Date' (04/10/2022), 'Document Type' (Clients), and 'Declared' (No).

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



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

## How to upload multiple attachments

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

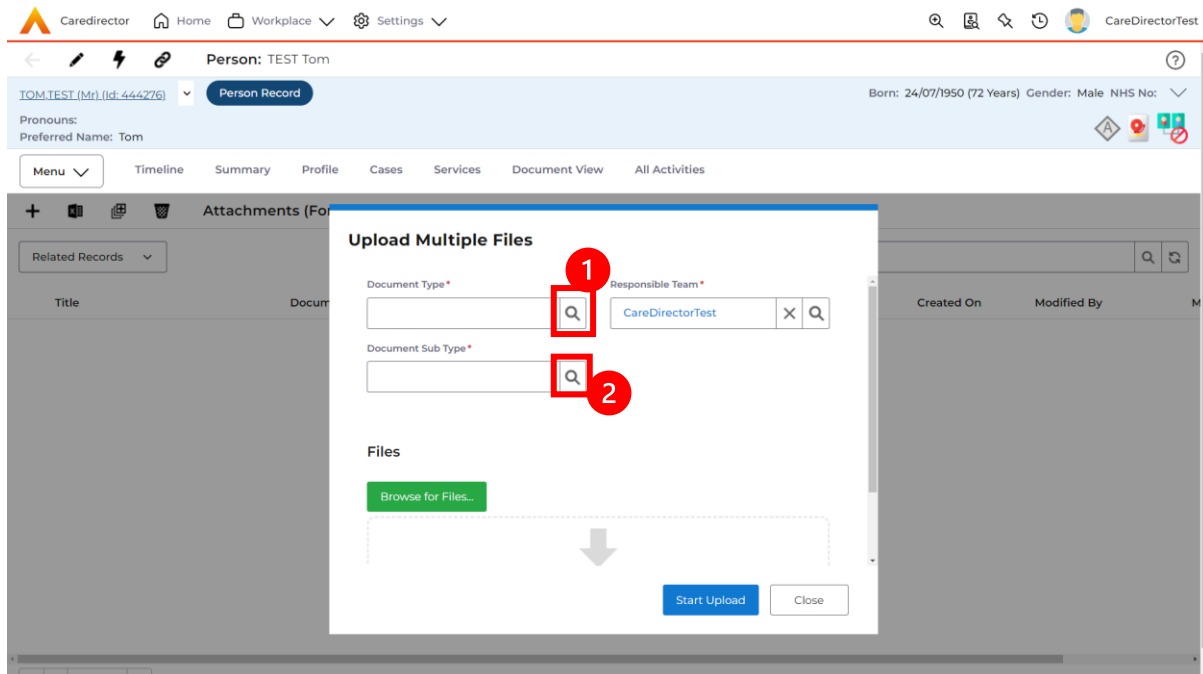
The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The record is for 'Person: TEST Tom' (ID: 444267), born 21/06/2022, male. The 'Menu' is open, showing options like 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Related Items' section is selected, displaying various categories like 'Activities', 'Addresses', 'Alerts And Hazards', etc. The 'Attachments' option is highlighted with a red box and a '3' in a red circle.

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

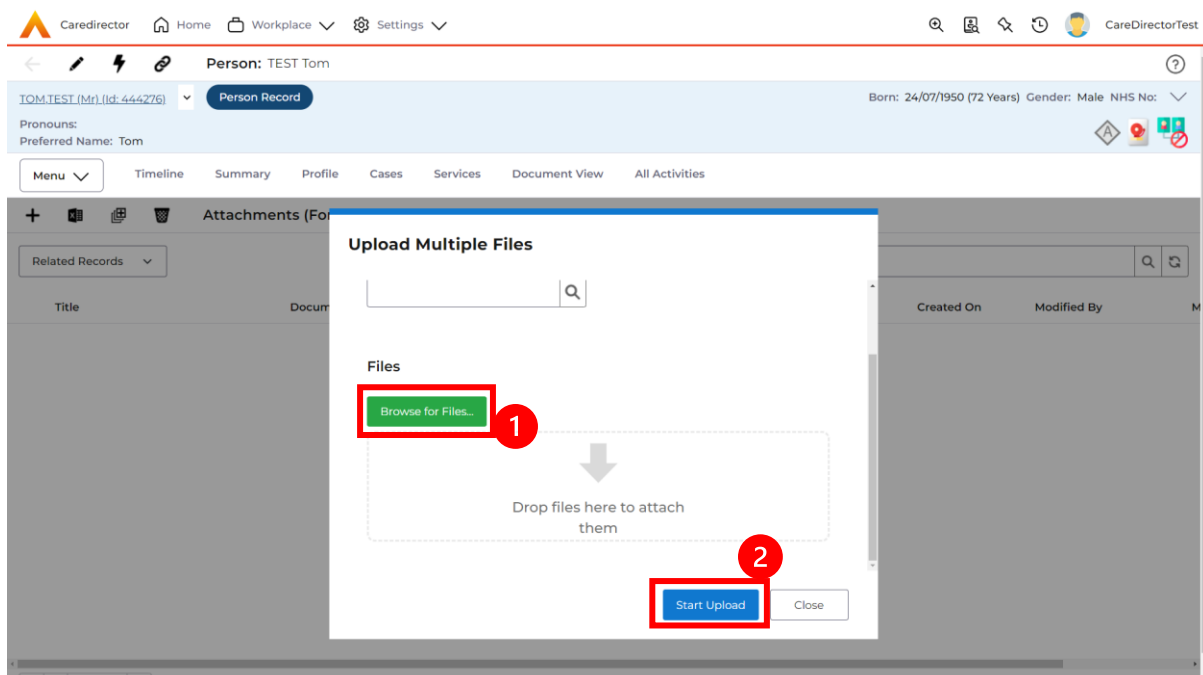
The screenshot shows the 'Attachments (For Person)' screen. The top navigation bar is the same as in the previous screenshot. The 'Menu' is open, and the 'Upload Multiple Files' icon (a document with a plus sign) is highlighted with a red box and a '1' in a red circle. Below the toolbar, there is a search bar for records and a table with columns: 'Title', 'Document Type', 'Document Sub Type', 'Date', 'Created By', and 'Created On'. The table is currently empty, displaying a 'NO RECORDS' message.



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



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



## How to find a Form (Case)

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

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. The main content area shows a timeline of events:

- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'. Involvement Member: Community Occupational Therapy Service, Role: Occupational Therapist, Start Date: 21/09/2022.
- Case Involvement Created** (21/09/2022 12:17:20): A new record of case involvement was created by Scott Simpson.

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

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' menu item is selected. The view shows a table of related records:

Due Date	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			

## How to add a Form

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

Person: TEST Tom

Person Record

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

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

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

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

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

Person Record

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

Menu ^ | Timeline | Details

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

Other Information | Involvements History | Joint Case Members | Status History

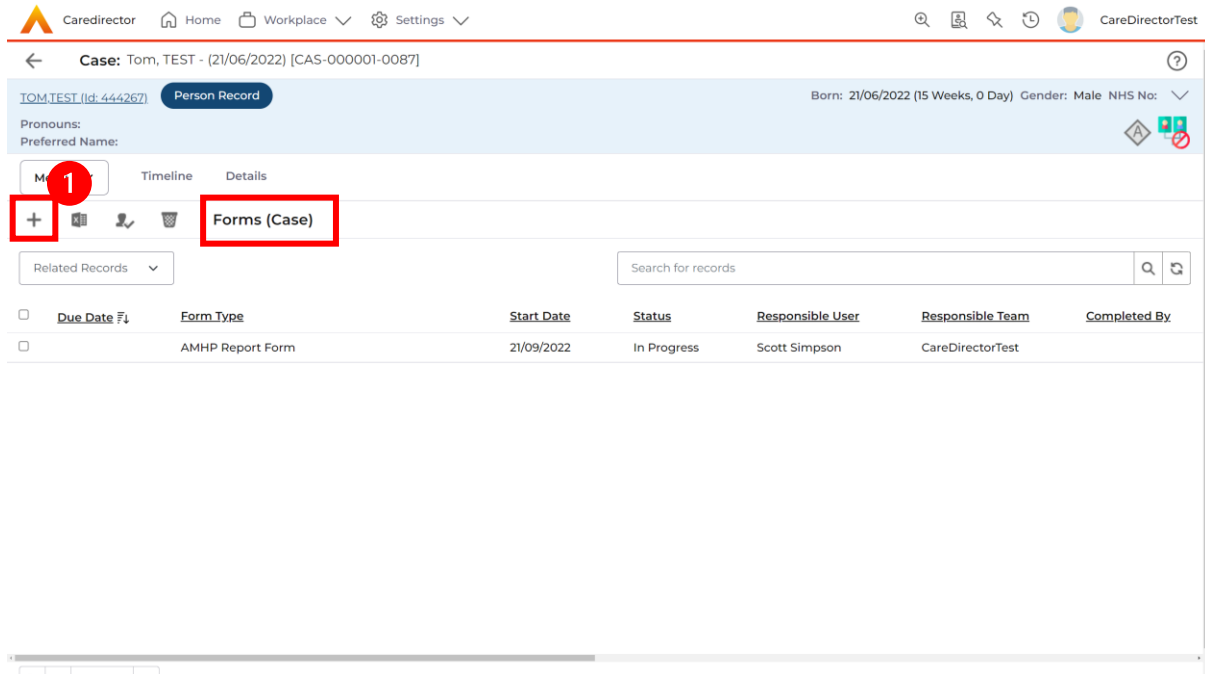
Team: [input] | Profession Type: [input]

Reset | Refresh | Apply

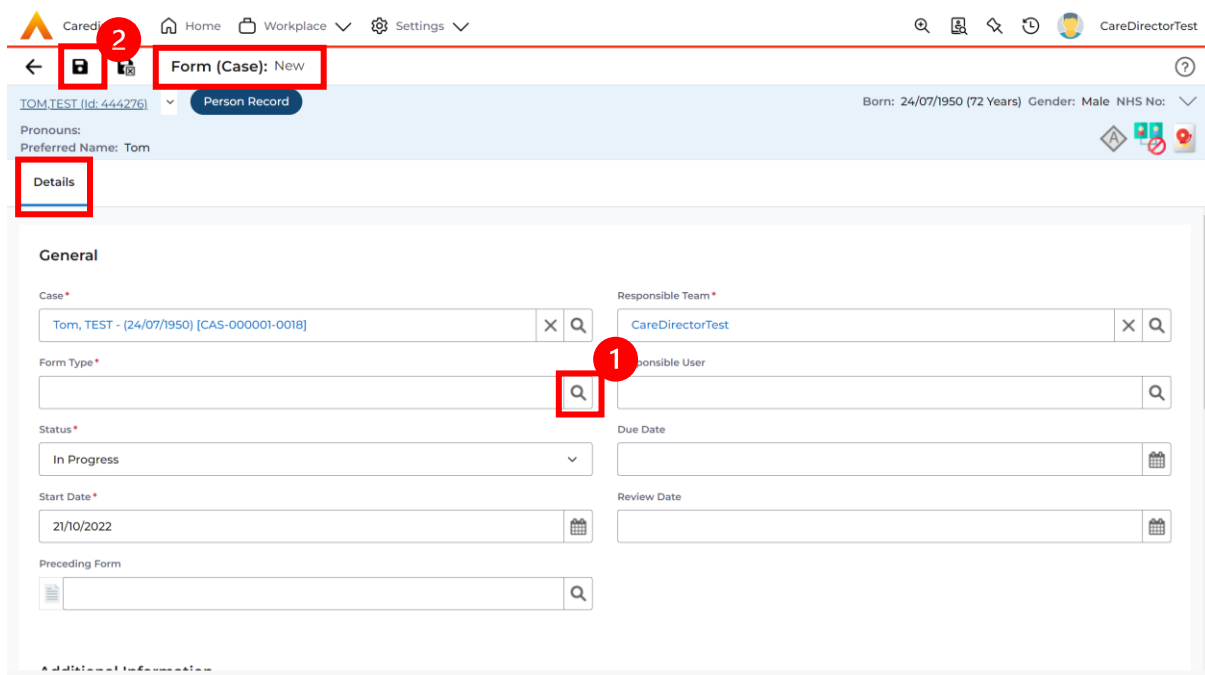
**Form (Case) Created** 21/09/2022 13:04:25  
A new record of form (case) was created by Scott Simpson.  
Due Date: [input] | Form Type: AMHP Report Form | Status: In Progress

**Case Involvement Updated** 21/09/2022 12:23:12  
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.  
Involvement Member: Community Occupational Therapy | Role: Occupational Therapist | Start Date: 21/09/2022 | Service: [input]

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



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



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

The screenshot shows the CareDirector interface for a 'Person Record' of TOM,TEST (Id: 444267). The main content area displays the 'General' section of the 'AMHP Report Form'. The form includes the following fields:

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

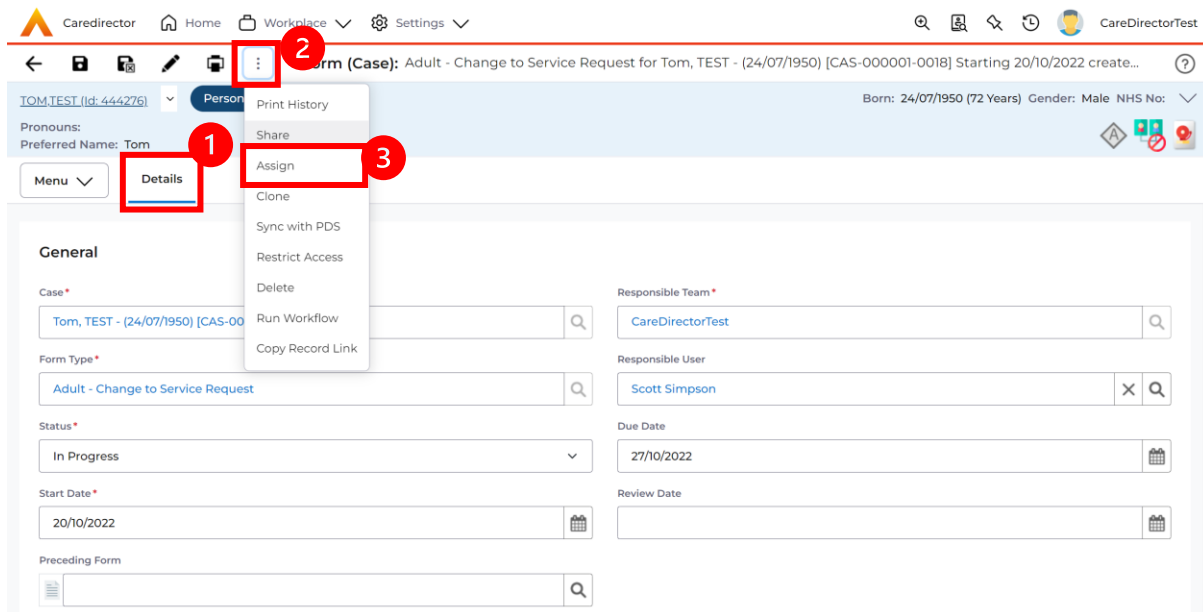
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

The screenshot shows the CareDirector interface for the 'AMHP Report Form'. The 'Save' button in the toolbar is highlighted with a red circle and the number 1. The form content includes:

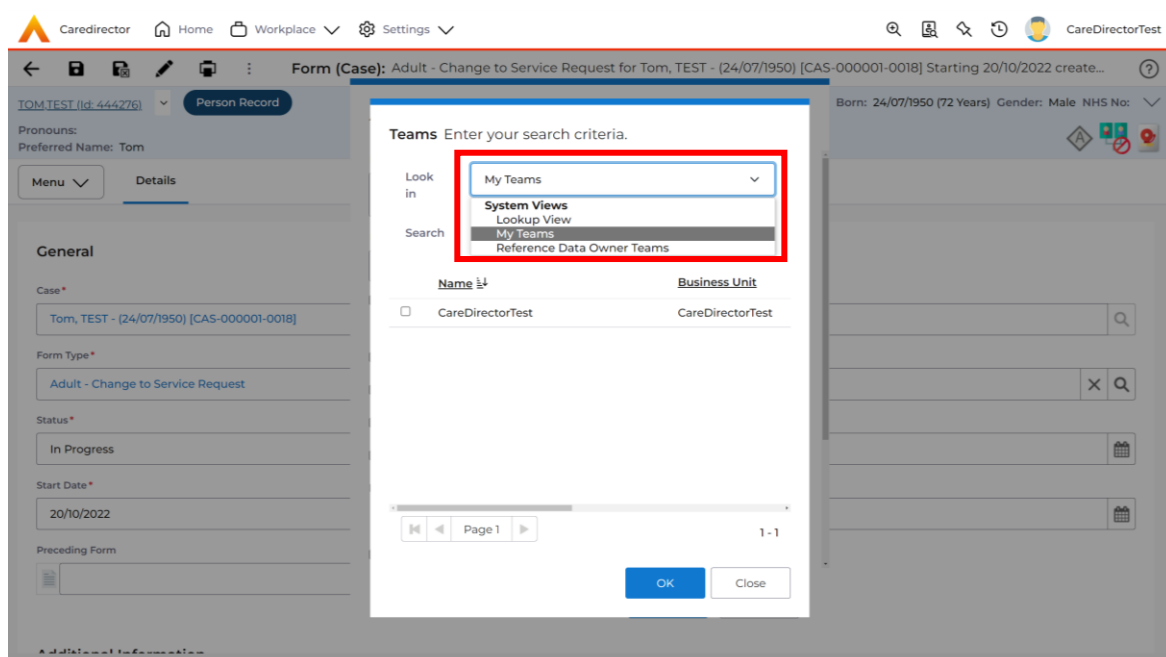
- Service User Details**
- Referral Details**
- Further Details**
- Background Information**
- AMHP'S Assessment of th...**
- Client previously known to services?**
  - Yes
  - No
- Ethnic Origin**
  - White - British / Northern Irish
  - White - Irish
  - White - Gypsy or Irish Traveller
  - White -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

## How to Allocate a Form

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



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



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

The screenshot shows the 'Assign' dialog box in the CareDirector system. The dialog is titled 'Assign' and contains the following fields and options:

- Responsible Team \***: A search field containing 'Accommodation Team'.
- Responsible User Decision \***: A dropdown menu set to 'Clear on current record only'.
- Include Inactive?**: A checkbox that is unchecked.
- Related Records to Include**: A list of checkboxes, all of which are checked:
  - Check/Uncheck All
  - Appointment
  - Assessment Factor
  - Attachment (Case Form)
  - Email
  - Email Attachment
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

## How to Clone a Form

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

The screenshot shows the CareDirector interface for a case record. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box. Below it, the 'Menu' dropdown is open, and 'Related Items' is selected, also highlighted with a red box. The 'Forms (Case)' option in the 'Related Items' sub-menu is highlighted with a red box and a red circle containing the number 3. The main content area shows a timeline of events, including 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

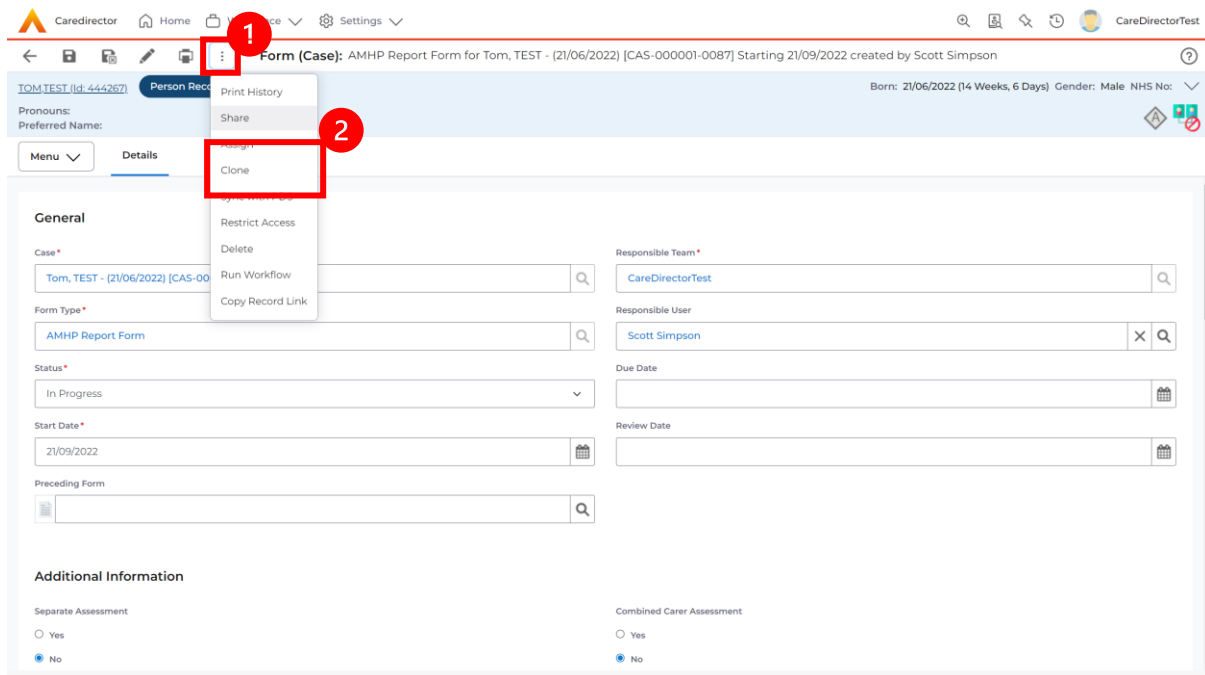
2. Select the relevant for **Form** to open.

The screenshot shows the 'Forms (Case)' sub-menu open. Below it, a table of related records is displayed. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The first row is highlighted.

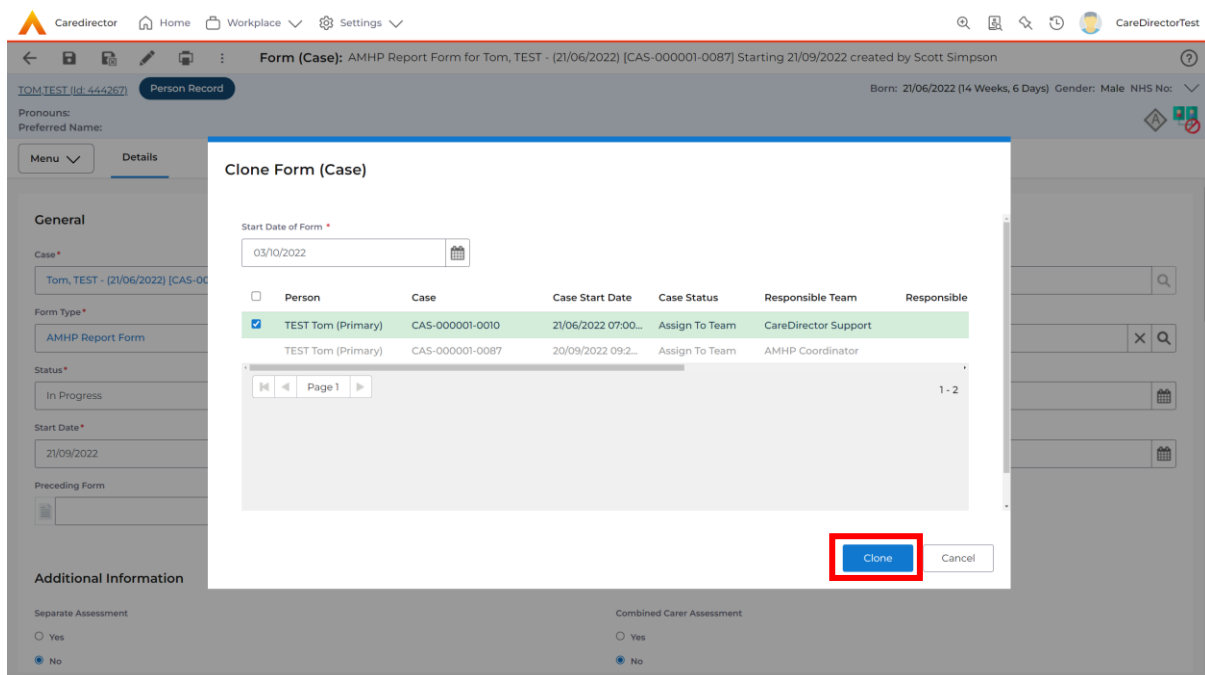
Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		



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



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



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

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. A search bar and user profile 'CD V6 Team' are on the right. Below this is a breadcrumb trail: 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. The main header area includes a dropdown for 'TOM TEST (id: 444267)', a 'Person Record' button, and patient information: 'Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:'. There are also icons for accessibility and other functions. Below the header is a 'Menu' dropdown and a 'Details' tab. The 'Details' section is divided into two main parts: 'General' and 'Completion Details'. The 'General' section contains fields for Case, Responsible Team, Form Type, Status, Start Date, Preceding Form, Responsible User, Due Date, and Review Date. The 'Completion Details' section contains fields for Completed By, Completion Date, Signed Off By, and Signed Off Date. All fields are populated with data from the form.

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

## How to reactivate a Closed Form

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a search bar and a user profile for 'CareDirectorTest'. The main content area displays a form titled 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The form is currently in a 'Closed' status. A red box highlights the title bar of the form window.

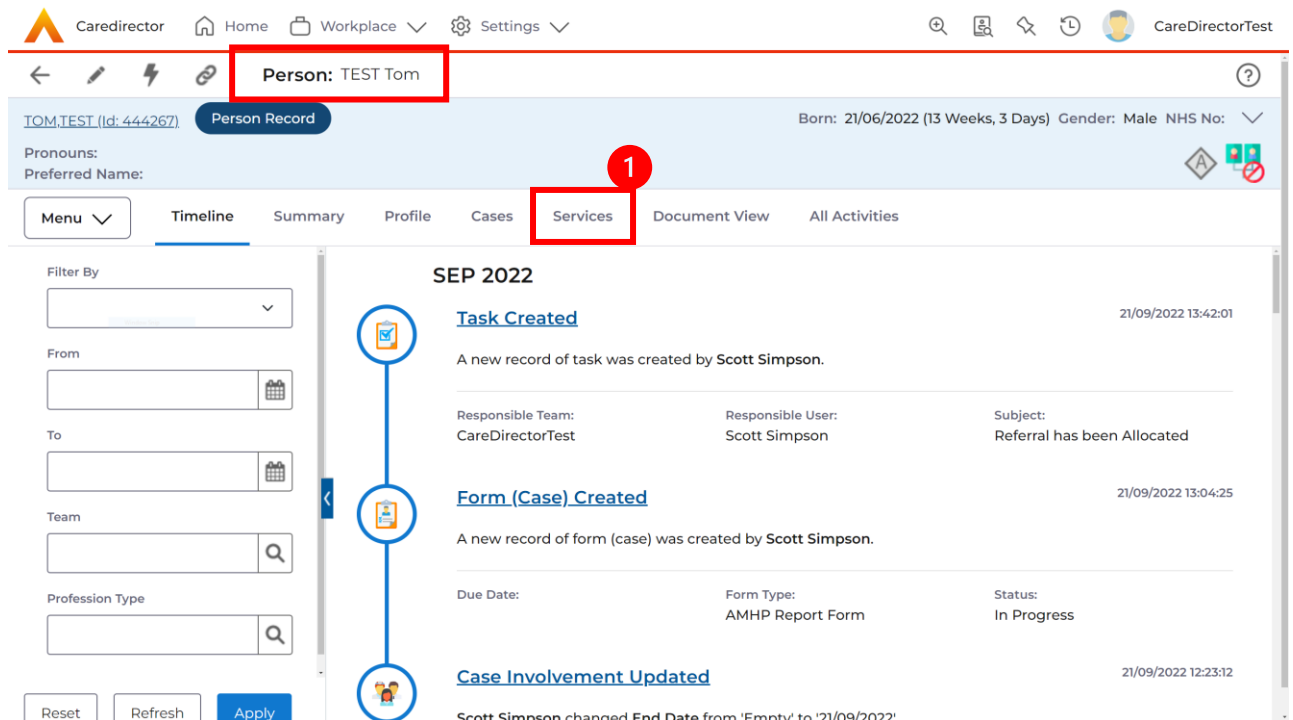
2. Select the **Three Dots** and select **Activate**.

The screenshot shows the CareDirector interface with the same form as above. A red box highlights the three dots menu icon (labeled '1') in the top navigation bar. A dropdown menu is open, showing options: 'Share', 'Assign', 'Clone', 'Restrict Access', 'Activate', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Activate' option is highlighted with a red box (labeled '2').

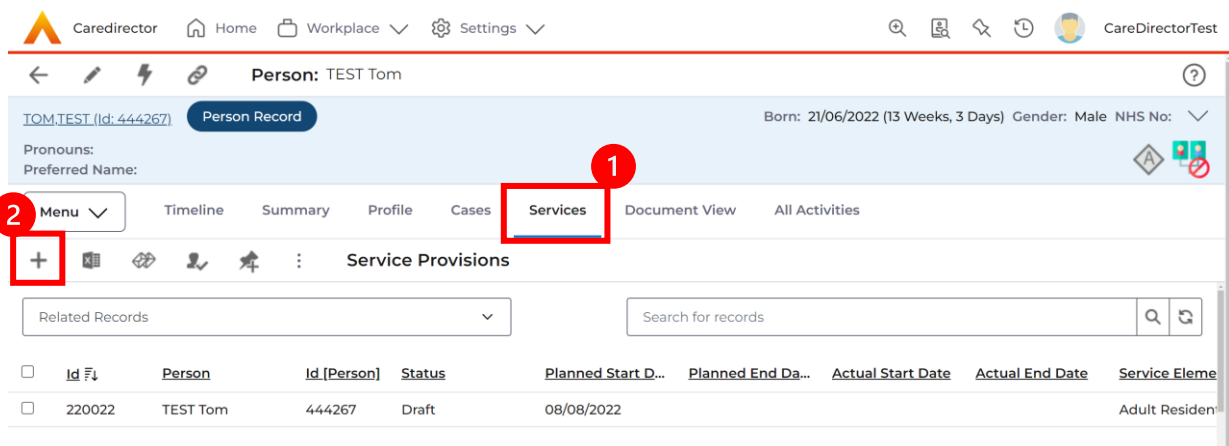
# How to input Service Provisions

## Where to find Service Provisions

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



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



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

## How to Authorise a Service Provision

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

The screenshot shows the 'Service Provision Statuses' dialog box. The 'Ready for Authorisation' status is selected. The 'OK' button is highlighted. Red callouts 1-4 indicate: 1. Status dropdown, 2. Selected status, 3. OK button, 4. Save button in the background.

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

The screenshot shows the 'Service Provisions' grid view. The 'Services' tab is selected. A service provision record is selected, and the 'Authorise' option is chosen from the context menu. Red callouts 1-4 indicate: 1. Services tab, 2. Selected record, 3. Three dots menu, 4. Authorise option.

## How to input Service Deliveries

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

The screenshot shows the CareDirector web interface. At the top, the breadcrumb trail is highlighted in red: "Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022". Below this, the user profile for "MULLENTEST, Tom (Id: 444264)" is visible, with the "Service Deliveries" tab selected and circled in red (labeled '1'). In the toolbar below the tabs, the "+" icon for creating a new record is circled in red (labeled '2'). Below the toolbar is a search bar for records and a table header with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and Wedr. The table content is empty, displaying "NO RECORDS" with the message "No results were found for this screen."

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

Caredirector Home Workplace Settings CD V6 Team

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

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

Menu Details Variations

### General

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

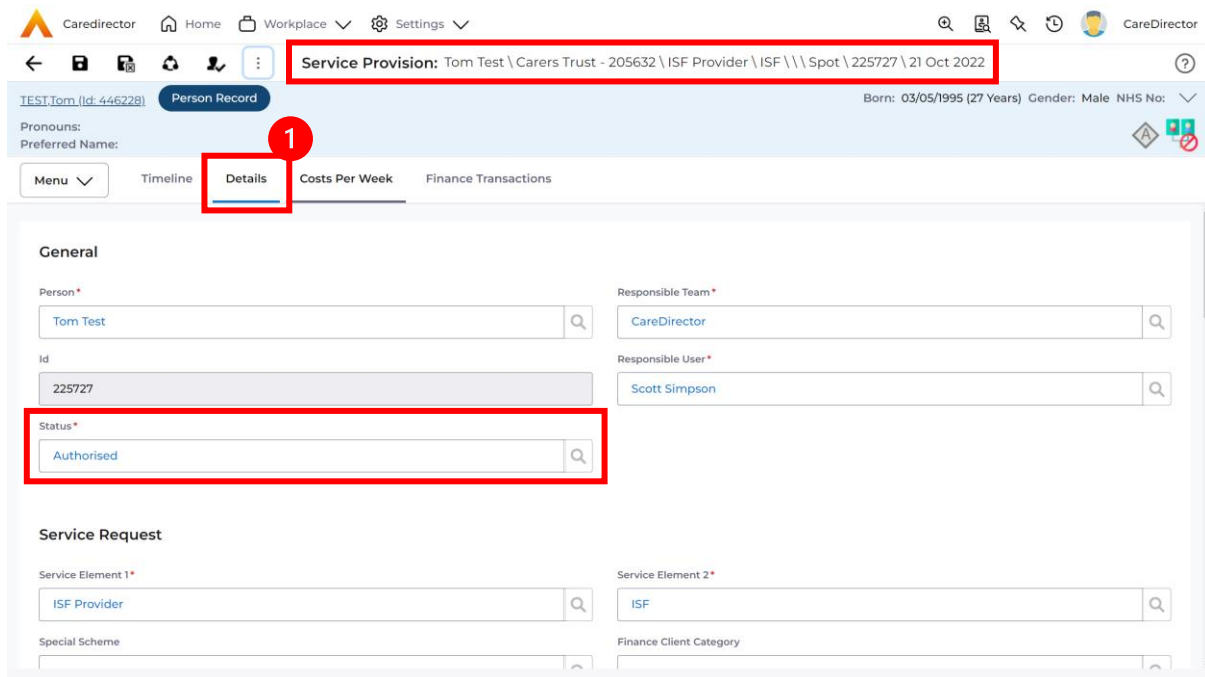
### Schedule applies to days

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

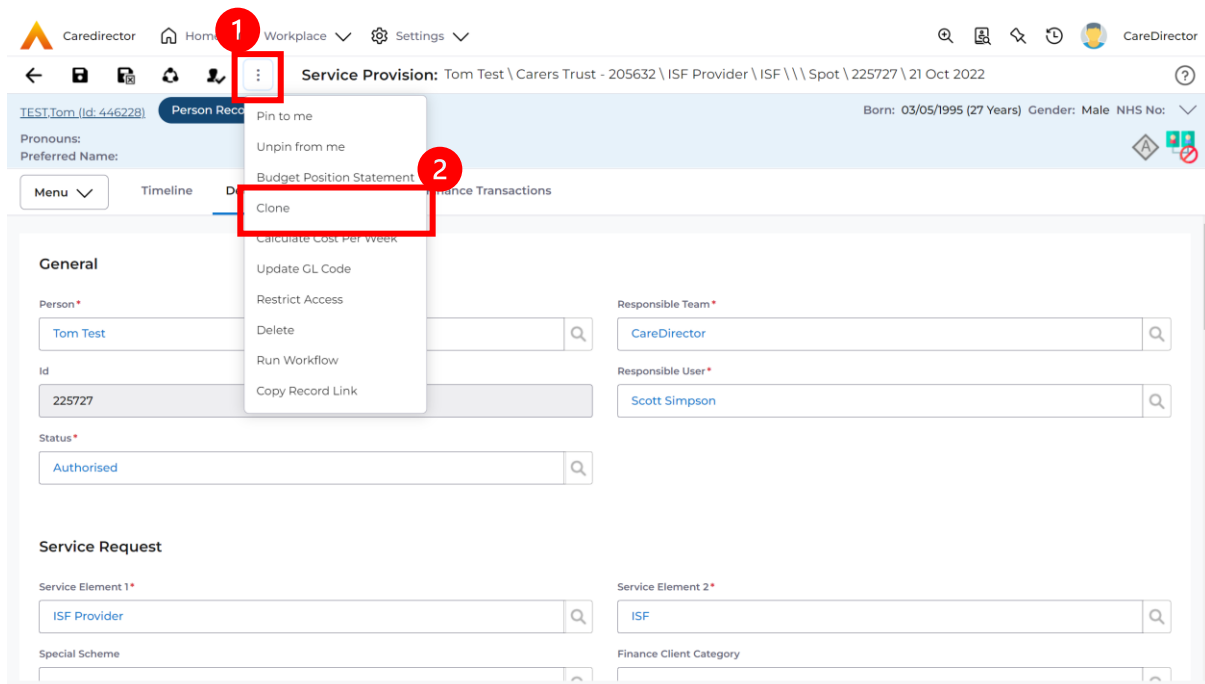
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

## How to Clone a Service Provision

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

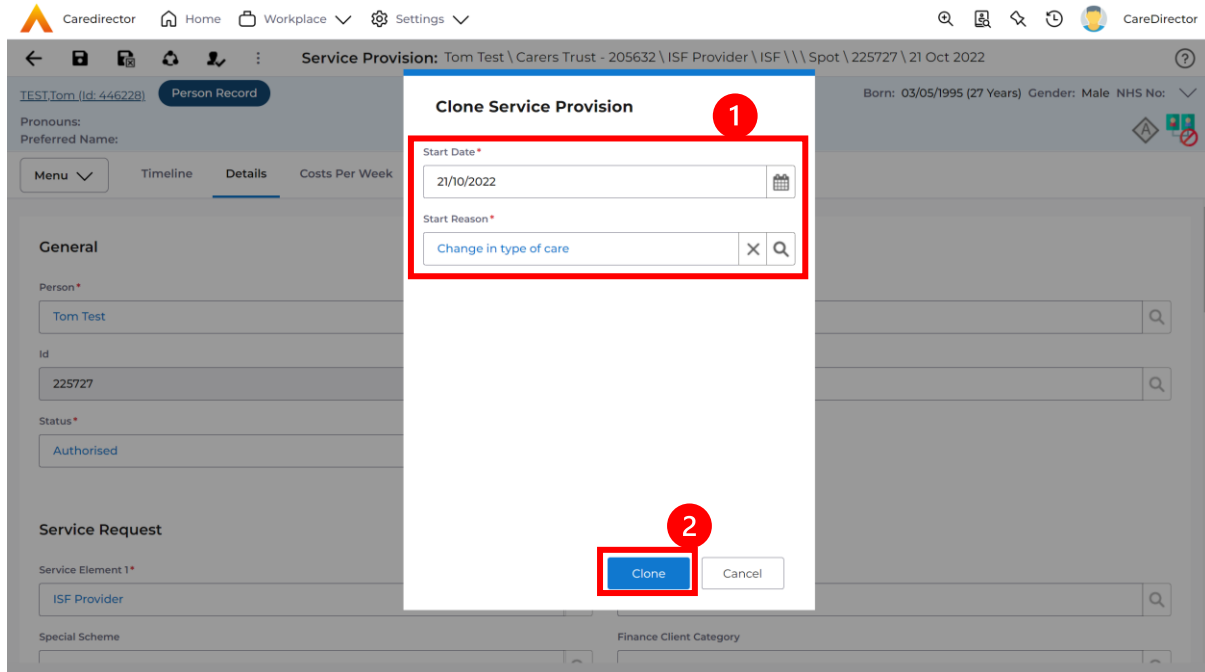


2. Select the **Three Dots** from the toolbar and select **Clone**.





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



## How to End Service Provisions

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

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

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

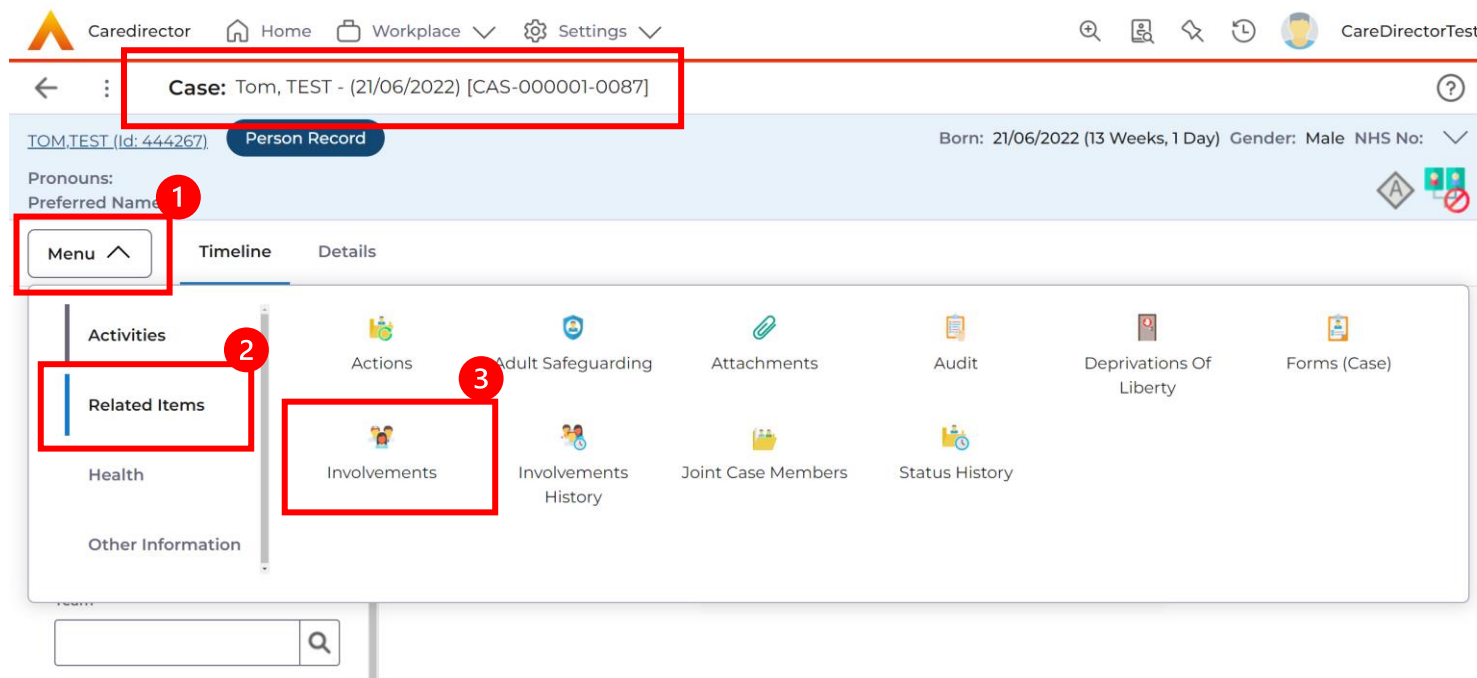
The 'Commissioning' section contains the following fields:

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

## How to close a Case

### Ending Secondary Involvements

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



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

Caredirector Home Workplace Settings CareDirectorTest

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

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

Pronouns:  
Preferred Name:

Menu Timeline Details

+ Case Involvements

Related Records Search for records

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

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

The screenshot shows the CareDirector interface for a Case Involvement. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail reads 'Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...'. The 'Details' tab is active. The form fields are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0087]
Responsible Team *	CareDirectorTest
Person *	TEST Tom
Involvement Member *	Community Occupational Therapy Service
Role *	Occupational Therapist
Start Date *	21/09/2022
Involvement Reason	
End Date	21/09/2022
Involvement End Reason	
Involvement Review Date	

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

## Close an Open Activity

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

The screenshot displays the CareDirector interface for a case record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below the case title, the patient information is shown: 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Menu' button is highlighted with a red box and a red circle containing the number '1'. The 'Activities' button is highlighted with a red box and a red circle containing the number '2'. The 'Activities' dropdown menu is open, showing options: 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. The 'Appointments' option is highlighted with a red box and a red circle containing the number '3'. Below the menu, there are search bars and form fields for 'Responsible User', 'Responsible Team\*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By\*', and 'Archive Date\*'.

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

Caredirector Home Workplace Settings CareDirectorTest

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

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

Pronouns:  
Preferred Name:

Menu ▾ Timeline Details

+ Tasks

Related Records ▾ Search for records 🔍 ↻

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

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

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus. The user profile 'CareDirectorTest' is visible in the top right. The main content area shows a task record titled 'Task: Referral has been Allocated'. A context menu is open over the record, listing options: Clone, Complete, Cancel, Restrict Access, Delete, Run Workflow, and Copy Record Link. The 'Complete' option is highlighted with a red box. The record details include the user 'TOM.TEST (Id: 44426)', birth date '21/06/2022 (13 Weeks, 1 Day)', and gender 'Male'. Below the record, there is a 'General' section with a 'Subject' field containing 'Referral has been Allocated' and a rich text editor for the 'Description' field. The rich text editor toolbar includes options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Link, Unlink, Table, Image, Video, and Embed. The character count at the bottom right of the description field is 'Characters (with HTML): 0/100000'.



## Closing a Case

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

The screenshot displays the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. A search bar contains the text 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, a header section shows 'TOM,TEST (Id: 444267)', 'Person Record', and 'Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:'. A tabbed interface below the header has 'Menu', 'Timeline', and 'Details' tabs, with 'Details' being the active tab. The main content area is titled 'Assignment Information' and contains several form fields: 'Case Status\*' with a dropdown menu showing 'Assign To Team', 'Case Priority', 'Responsible User', 'Responsible Team\*' with a dropdown menu showing 'AMHP Coordinator', and 'Review Date' with a calendar icon. Red boxes and numbers highlight the 'Case Status\*' dropdown (labeled '1') and the 'Assignment Information' section header (labeled '2').

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

Caredirector Home Workplace Settings

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

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

Menu Timeline **Details**

### Assignment Information

Case Status \*  
Assign To Team **2**

Case Priority

Responsible User

Responsible Team \*  
AMHP Coordinator

Review Date

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

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. A modal window titled 'Case Statuses' is open, allowing the user to search for and select a case status. The modal includes a search bar and a list of status options. The 'Closed & Logged As Enquiry' option is selected. The 'OK' button is highlighted with a red box.

**Case Statuses** Enter your search criteria.

Look in: Social Care Case Status Lookup View

Search: Search for records

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

Page 1 | 1 - 13

**OK** Close

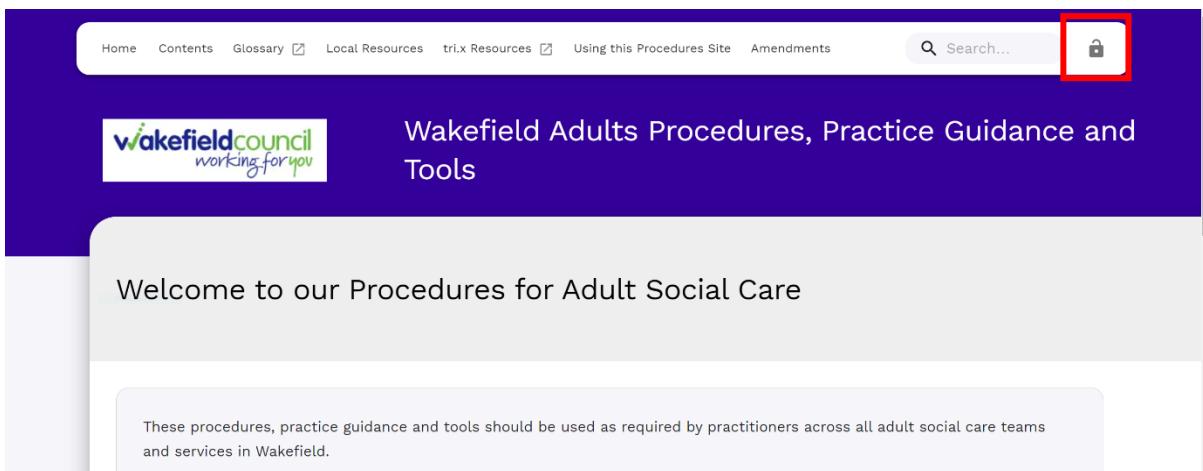
- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot displays the 'Assignment Information' section of the CareDirector interface. The 'Case Status' is set to 'Closed'. The 'Close Date' is '03/10/2022' at '13:43'. The 'Closure Reason' is 'All Work Completed'. The 'Closure Accepted By' is 'Scott Simpson'. The 'Archive Date' is '28/10/2022'. The 'Last Assigned to Team Date' is '20/09/2022'. The 'Responsible Team' is 'AMHP Coordinator'. The 'Responsible User' is empty. The 'Review Date' is empty. The 'Other Information' section shows 'Re-Referral' and 'Non-Migrated Worker Name'.

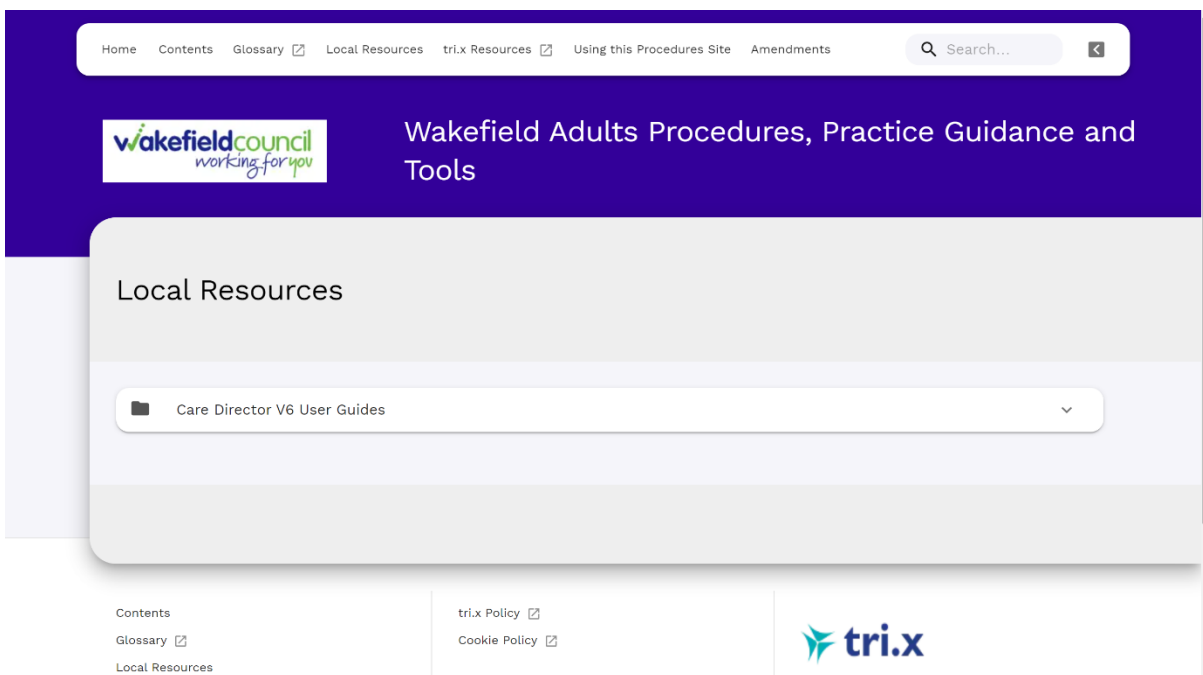
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

## Further CareDirector Guidance

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



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



**Version Control**

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	06/10/2022