

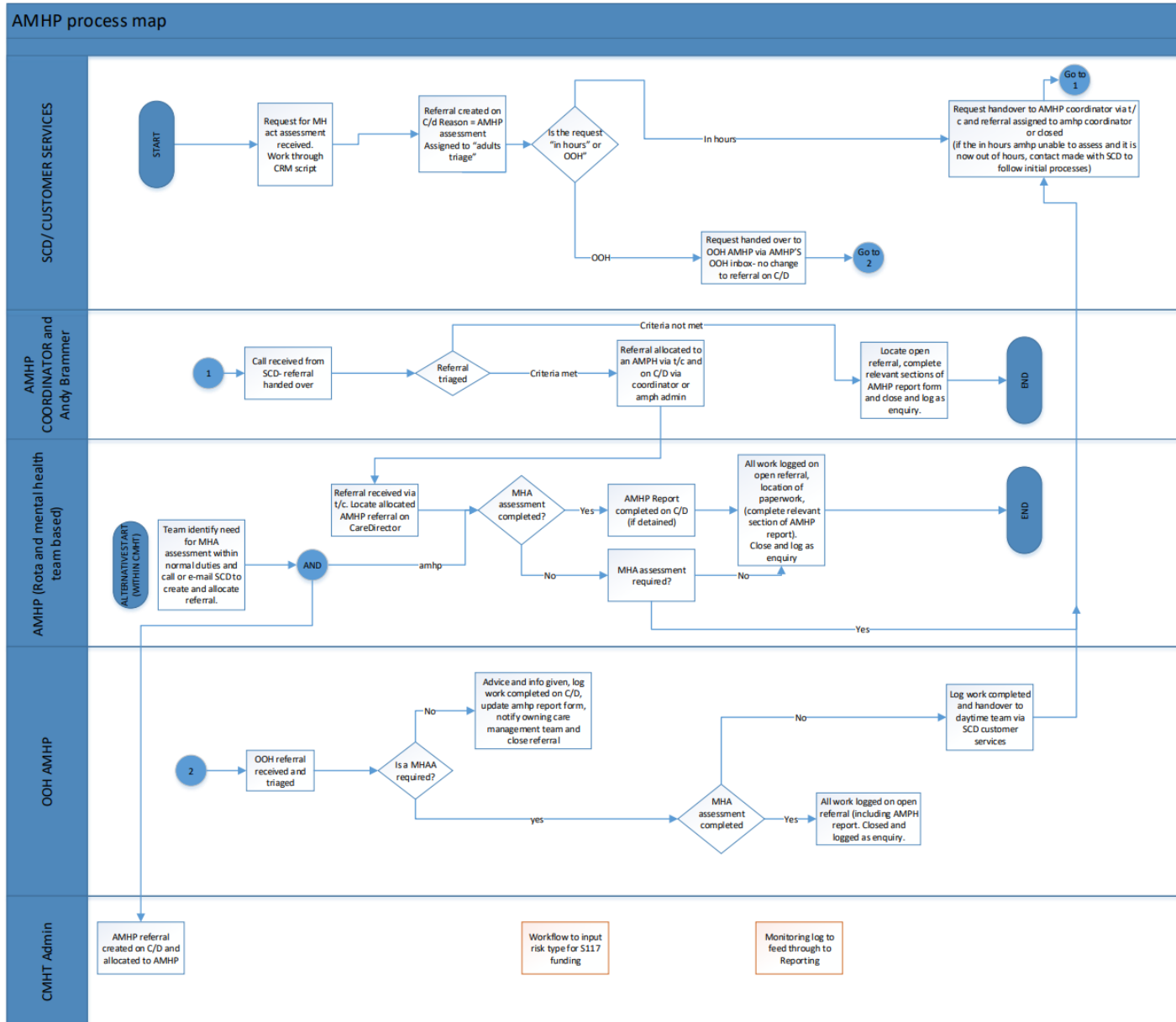


AMHP Guidance V1.0

Document	AMHP Guidance.
Purpose	AMHP Guidance for AMHP's and AMHP Coordinator's.
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Mental Health Act Assessment Request Procedure

There are two way a request for a Mental Health Act Assessment can be received:

1. The need for a MH Act Assessment is identified by the Mental Health Team within normal duties or;
2. A request for a MH Act Assessment is received by Customer Services.

Mental Health Team Process

1. In this scenario, the AMHP will request the creation of the case by their administration team or contact Social Care Direct via email (social_Care_direct@wakefield.gov.uk) to create and assign a case to the Mental Health Team ([Appendix 1](#)).
2. Once the case is received, either the AMHP or request admin will allocate the case to Mental Health Team ([Appendix 2](#)).
3. This case will be then viewable via their WMDC Practitioner dashboard.
4. AMHP will have the responsibility to record their intervention on the **AMHP report form** ([Appendix 3](#)) and record any activities. If the paper form is attached to CareDirector the **AMHP report form** must still be completed.
5. If AHMP finishes the assessment and the case does not require a handover, they will **close and log as enquiry** ([Appendix 4](#)).
6. If AMHP has been able to assess and the case requires a handover, they will need to record any work/ information gathered along with “**MHA not completed handover to OOH AMHP**” on activities and handover to the **Out of Hours AMHP** by telephone/ email (AMHPsOutofHours@wakefield.gov.uk and **CC** adultstriage@wakefield.gov.uk). The case will also require

transfer on CareDirector to the **AMHP Coordinator Dashboard** ([Appendix 5](#)).

7. If OOH AMHP is unable to complete the assessment, they will need to record any work/information gathered along with **“MHA not completed handover to day rota”** on activities. If the **OOH AMHP** has allocated the case to themselves, they will need to transfer it to the **AMHP Coordinator Dashboard**.
8. If the AMHP is to hold the assessment until a later date then the case should be transferred back on the AMHP Coordinator Dashboard and an activity completed to state **“AMHP service holding the assessment, to be completed at a later date”** along with the reason why.

A request for a MH Act is received by Customer Services/ Social Care Direct

1. Following a telephone handover with Customer Services/ Social Care Direct, the **case** will be picked up by the AMHP Coordinator via the **AMHP Coordinator Dashboard** ([Appendix 6](#)).
2. Once opened, they will open an **AMHP report form** ([Appendix 3](#)).
3. They will then select **Allocate** in the **Case Status** and input themselves or another works name ([Appendix 2](#)).
4. Once a telephone handover has taken place between the AMHP Coordinator and allocated AMHP, the AMHP can locate the case via their **WMDC Practitioner dashboard**.
5. Once the case is located it is the responsibility of the AMHP to record their intervention on the AMHP report form ([Appendix 3](#)) and record any activities required ([Appendix 6](#)).
6. If the AMHP finishes the assessment and the case does not require handover, they will **close and log as enquiry** ([Appendix 4](#)).

7. If the AMHP has not been able to assess and the case requires a handover, they will need to record any work/ information gathered along with **“MHA not completed handover to OOH AMHP”** on activities and handover to the Out of hour AMHP by telephone/ email (AMHPsOutofHours@wakefield.gov.uk and cc adultstriage@wakefield.gov.uk).
8. The case will also require transfer on CareDirector to the **AMHP Coordinator Dashboard** ([Appendix 5](#)).
9. If the AMHP is to hold the assessment until a later date then the case should be transferred back on the **AMHP Coordinator Dashboard** and an activity completed to state **“AMHP service holding the assessment, to be completed at a later date”** along with the reason why.
10. If the request for a mental health act assessment is received out of hours, customer services will Assign the case to the Adults Triage Team as per current procedures.
11. If the **OOH AMHP** is unable to complete the assessment they will need to record any work/ information gathered along with **“MHA not completed handover to day rota”** on activities, transfer the case to the **AMHP Coordinator Dashboard** and email the case link to Social Care Direct, Adults Triage and AMHP Service.
12. Once the **AHMP report form** has been completed on CareDirector a workflow creates an activity on the MCA dashboard for the S117 information to be recorded in risks.

Mental Health Act Assessment Request Guide

Appendix 1 - Creation of Case

1. An AMHP Case is created in CareDirector with the **Contact Reason** of **AMHP Assessment** and the **Responsible Team** of **AMHP Coordinator**.
2. To **Assign to AMHP Coordinator**, select the **Lookup** function in **Responsible Team** and search for **AMHP Coordinator**.

The screenshot shows the 'Case: New' form in CareDirector. The 'Contact Reason' dropdown menu is highlighted with a red box and contains the option 'A - AMHP Assessment'. A red circle with the number '1' is placed over the dropdown arrow. Other fields include Case No., Person (TEST Tom), Case Date/Time (20/09/2022 09:20), Initial Contact, Date/Time Contact Received (20/09/2022 10:25), Contact Source (Health - Secondary), and Contact Received By (Shannon Hey).

Pronouns:
Preferred Name:



Details

Is the Person aware of the Contact? *

Yes

Does Person agree/support this Contact? *

Yes

Is Parent(s)/Carer(s) aware of this Contact

Is N.O.K./Carer aware of this Contact?

Assignment Information

Case Status *

Assign To Team

Case Priority

Responsible User

Responsible Team *

AMHP Coordinator

Review Date

Last Assigned to Team Date



Appendix 2 - How to Allocate a Case Part 1

1. Select the **lookup** function next to **Case Status** field.

The screenshot shows the 'Case: New' form in CareDirector. At the top, there are navigation links for Home, Workplace, and Settings. The user is logged in as 'CareDirectorTest'. The form is for a person named 'TOM.TEST (id: 444267)'. The 'Case Status' field is currently set to 'Assign To Team' and has a search icon (magnifying glass) next to it, which is highlighted with a red box and a red circle containing the number '1'. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team' (set to 'AMHP Coordinator'), 'Review Date', and 'Last Assigned to Team Date'. The 'Other Information' section includes 'Re-Referral' (set to 'No'), 'Non-Migrated Worker Name', and 'Referring Agency Case Id'.

2. The following screen will be displayed, select **Allocated**. Then **OK**.

The screenshot displays the CareDirector interface for a person record. A modal window titled "Case Statuses" is open, allowing the user to select a case status. The modal includes a search bar and a list of status options. The "Allocated" status is selected and highlighted with a red box and a red circle containing the number "1". The "OK" button at the bottom of the modal is also highlighted with a red box and a red circle containing the number "2".

Case Statuses Enter your search criteria.

Look in: Social Care Case Status Lookup View

Search: Search for records

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

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OK Close

3. Select **Lookup** function next to the **Responsible User** field.

Caredirector Home Workplace Settings Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] CareDirectorTest

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 0 Day) Gender: Male NHS No: [redacted]

Menu Timeline **Details**

Is Parent(s)/Carer(s) aware of this Contact [dropdown]

Assignment Information

Case Status* [x] [lookup]

Case Priority [input] [lookup]

Responsible User* [lookup] **1**

Responsible Team* [lookup]

Review Date [calendar icon]

Last Assigned to Team Date [calendar icon]

Other Information

Re-Referral
 Yes
 No

Referring Agency Case Id [input]

Non-Migrated Worker Name [input]

Date and Time of Contact with Trained Staff [input]

4. This will open a new window, select where to **Look In** and either select **My Record** or **My Default Team**. Select the relevant person. Then select **OK**.

The screenshot displays the CareDirector V6 AMHP Guidance interface. A 'System Users' dialog box is open, allowing the user to select a user or team. The dialog box has a 'Look in' dropdown menu (1) with 'My Business Unit Users' selected. Below it is a list of system views (2) including 'My Record' and 'My Default Team'. At the bottom of the dialog is an 'OK' button (3) and a 'Close' button. The background shows the 'Person Record' page for 'IOM.TEST (Id: 444267)' with fields for 'Assignment Information' and 'Other Information'.

5. When the case has a **Responsible User Allocated**, select **Save** from the toolbar. The case is now **Allocated**.

The screenshot shows the CareDirector interface for a case named TOM.TEST (Id: 444267). The page title is "Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]". The user is logged in as CareDirectorTest. The page has a navigation bar with "Caredirector", "Home", "Workplace", and "Settings". The main content area is titled "Person Record" and shows details for TOM.TEST, including birth date (21/06/2022), gender (Male), and NHS number. The "Assignment Information" section contains several fields: "Case Status" (Allocated), "Case Priority", "Responsible User" (Scott Simpson), "Responsible team" (AMHP Coordinator), "Review Date", and "Last Assigned to Team Date". The "Responsible User" field is highlighted with a red box and a "1" in a red circle. The "Other Information" section includes "Re-Referral" (No), "Non-Migrated Worker Name", and "Date and Time of Contact with Trained Staff". A "2" in a red circle highlights the save icon in the top toolbar.

Appendix 2.1 – How to Allocate a Case Part 2

1. Once Part 1 has been saved. If they require to change the **Responsible Team** or **Change the Responsible User/ Team** on the **AMHP Form**, then select the **Assign this Record to another team**.

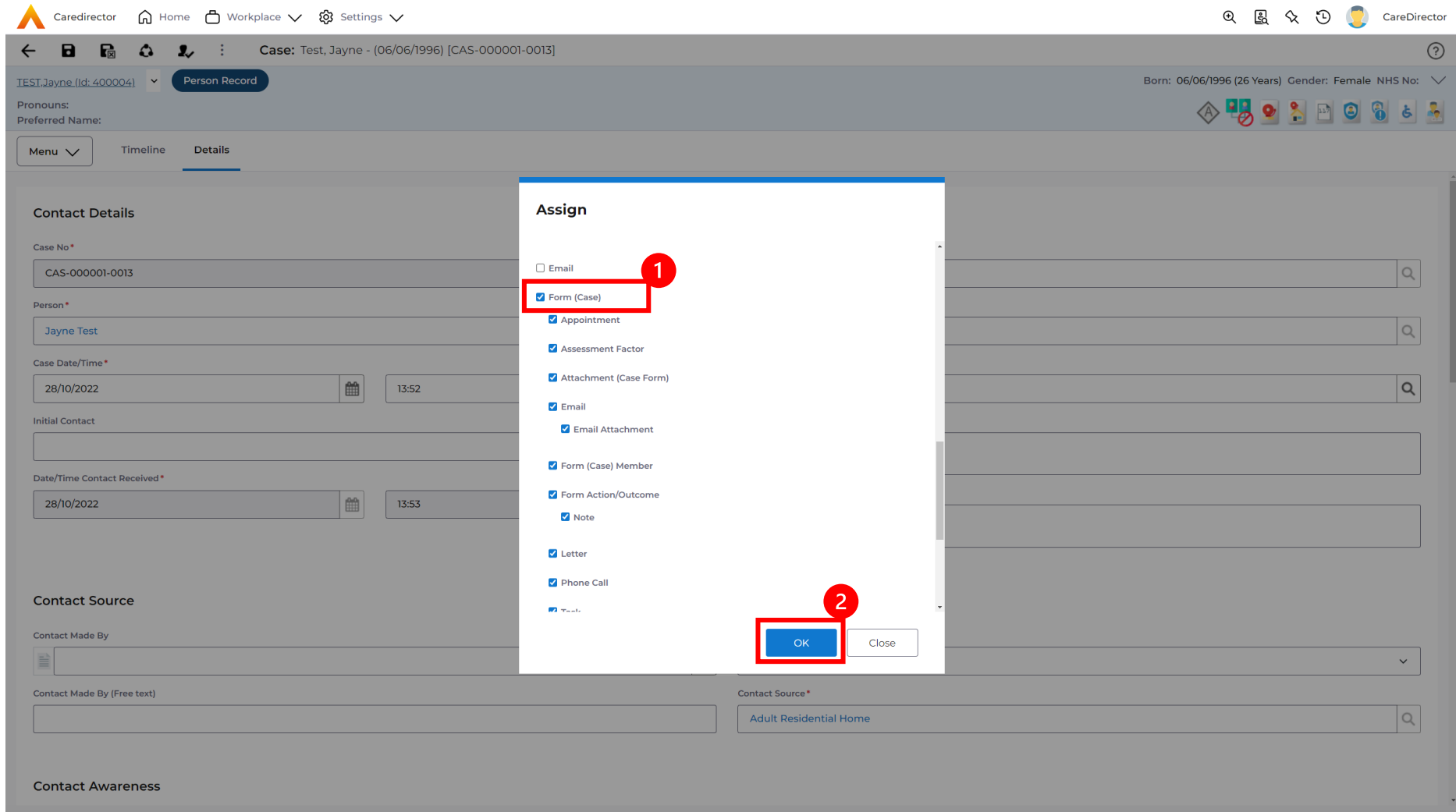
The screenshot shows the CareDirector interface for a case record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Person Record' button is highlighted with a red box and a red circle containing the number '1'. The 'Assignment Information' section contains the following fields:

- Is Parent(s)/Carer(s) aware of this Contact: [Dropdown menu]
- Case Status*: Allocated [X] [Q]
- Case Priority: [Search icon]
- Responsible User*: Scott Simpson [X] [Q]
- Responsible Team*: AMHP Coordinator [Q]
- Review Date: [Calendar icon]
- Last Assigned to Team Date: [Calendar icon]

- This will open a new window. Choose the **Responsible Team** first, then under **Responsible User Decision** select **Change on Current and Child Records**. This will give you another field that will have the list of System Users from the **Responsible Team** you just selected.

The screenshot displays the CareDirector V6 AMHP Guidance interface. The main window shows the 'Person Record' for 'TEST, Jayne (id: 400004)'. The 'Assign' dialog box is open, showing the 'Responsible Team' dropdown menu with 'AMHP rota' selected (indicated by a red box with a '1'). Below it, the 'Responsible User Decision' dropdown menu is open, with 'Change on current and child records' selected (indicated by a red box with a '2'). The dialog box also includes options for 'Do not change', 'Change on current record only', 'Clear on current record only', and 'Clear on current and child records'. There are checkboxes for 'Adult Safeguarding', 'Adult Safeguarding Primary Reason History', 'Adult Safeguarding Secondary Reason', 'Adult Safeguarding Status History', 'Note', and 'Task'. The 'OK' and 'Close' buttons are at the bottom of the dialog box. The background shows the 'Person Record' details, including Case No (CAS-00001-0013), Person (Jayne Test), Case Date/Time (28/10/2022, 13:52), Initial Contact, Date/Time Contact Received (28/10/2022, 13:53), Contact Source (Adult Residential Home), and Contact Made By.

3. After selecting the user from the list, under **Related Records to Include** find the checkbox next to **Forms (Case)** and select it. Then **OK**.



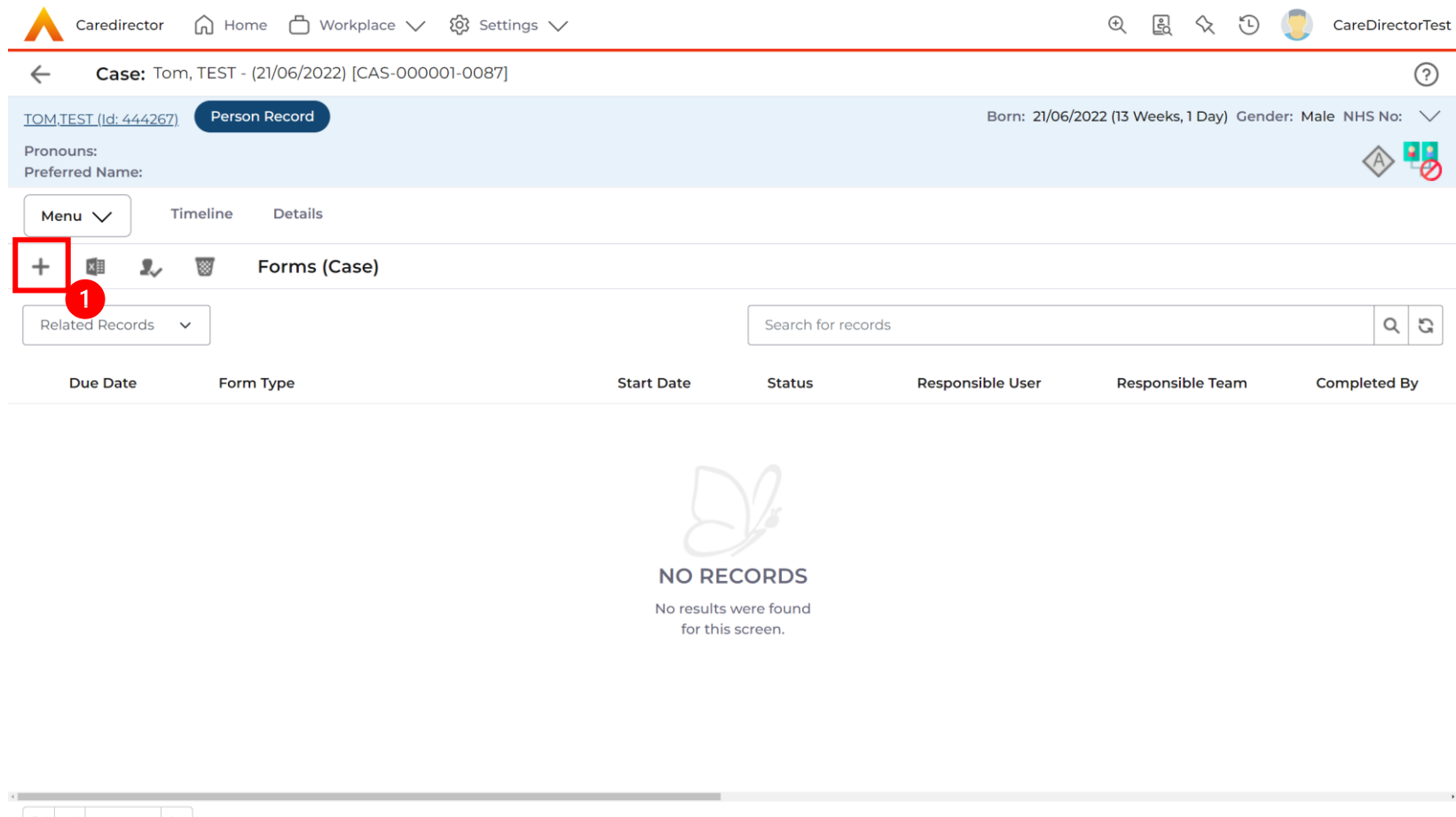
Appendix 3 - How to create and launch the AMHP report form

1. Select the **Menu** drop down list within the **Case Record**. Then select **Related Items** then **Forms (Case)**.

The screenshot displays the CareDirector Case Record interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box. Below the case title, the 'Person Record' tab is active. The left-hand navigation menu has 'Menu' (1) selected, which has opened a dropdown. In this dropdown, 'Related Items' (2) is selected, which has opened a sub-menu. In this sub-menu, 'Forms (Case)' (3) is highlighted with a red box. Below the navigation menu, there are several search bars and form fields: 'Responsible User', 'Responsible Team*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By*', and 'Archive Date*'.

- 2.

3. Please note: If you see that there is another open **AMHP Report Form** against this **Case**, that someone else has completed or part-completed you can still open and complete your form. You just need to be mindful that when you have finished your work and need to close the Case down, you will need to contact the other Practitioner to tell them to close their form.
4. If there is not a **AMHP Report Form**, create one by select the **Create New Record** icon on the widget toolbar.



5. This will open the Form (Case) creation screen. Under **Form Type** field select the **Lookup** function and select **AMHP Report Form**. Then select **OK**. Then **Save**.

The screenshot shows the 'Form (Case): New' screen in CareDirector. The 'Form Type' field is highlighted with a red box. A 'Documents' modal is open, showing a list of document types. The 'AMHP Report Form' is selected and highlighted with a red box. A red circle with the number '1' is next to the 'AMHP Report Form' row, and another red circle with the number '2' is next to the 'OK' button in the modal.

Documents Enter your search criteria.

Look in: Published Case Documents

Search: Search for records

	Name	Document Type
<input type="checkbox"/>	Adults Telecare Referral Form	Assessment
<input type="checkbox"/>	All About Me	Assessment
<input checked="" type="checkbox"/>	AMHP Report Form	Assessment
<input type="checkbox"/>	Carers Conversation Record	Assessment
<input type="checkbox"/>	Carers Support Plan	Assessment
<input type="checkbox"/>	Carers Support Plan Review	Assessment
<input type="checkbox"/>	Child and Family Assessment	Assessment

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OK Close

6. However, if there is one already available. Double click on the **AMHP Report Form** to open.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The interface includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main content area shows the case details, including 'Person Record' and 'Born: 21/06/2022 (13 Weeks, 1 Day)'. Below this, there is a 'Forms (Case)' section with a table of records. The table has columns for 'Due Date', 'Form Type', 'Start Date', 'Status', 'Responsible User', 'Responsible Team', and 'Completed By'. One record is listed: 'AMHP Report Form' with a start date of '21/09/2022', status of 'In Progress', responsible user of 'Scott Simpson', and responsible team of 'CareDirectorTest'. This row is highlighted with a red border.

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

7. Once the Form is open, ensure you are named as **Responsible User**. Then open the form by selecting the pencil **Edit** icon on the toolbar.

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the form title: 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 21/09/2022 created by Scott Sim...'. Below this, there is a 'Person Record' button and patient details: 'TOM,TEST (Id: 444267)', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Details' tab is active, showing a 'General' section with the following fields:

- Case*: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Form Type*: AMHP Report Form
- Status*: In Progress
- Start Date*: 21/09/2022
- Responsible Team*: CareDirectorTest
- Responsible User: Scott Simpson (highlighted with a red box)
- Due Date: (empty)
- Review Date: (empty)

8. On the left-hand list, these are the sections of the form. Under **Referral Details** scroll down the main text until you reach **“Is a Full AMHP report required?”** If you select **Yes** new sections in the form will be displayed.

9. Fill out the relevant sections within this form and when completed select **Save and Return to Previous page.**

Caredirector Home Workplace Settings

AMHP Report Form

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

Pronouns:
Preferred Name:

- Service User Details
- Referral Details
- Further Details
- Background Information
- AMHP'S Assessment of th...

Choose scanned if you have handwritten and scanned your report to CareDirector.

Is a full AMHP report required?

Yes
 No
 Scanned

Assessment Deferral:

Awaiting confirmation of medical fitness
 Not medically fit
 Intoxication
 Translator

10. This will return to the **Details** tab of the **Form (Case)** where the **Status** can now be changed to **Complete**. When changed, select **Save**.

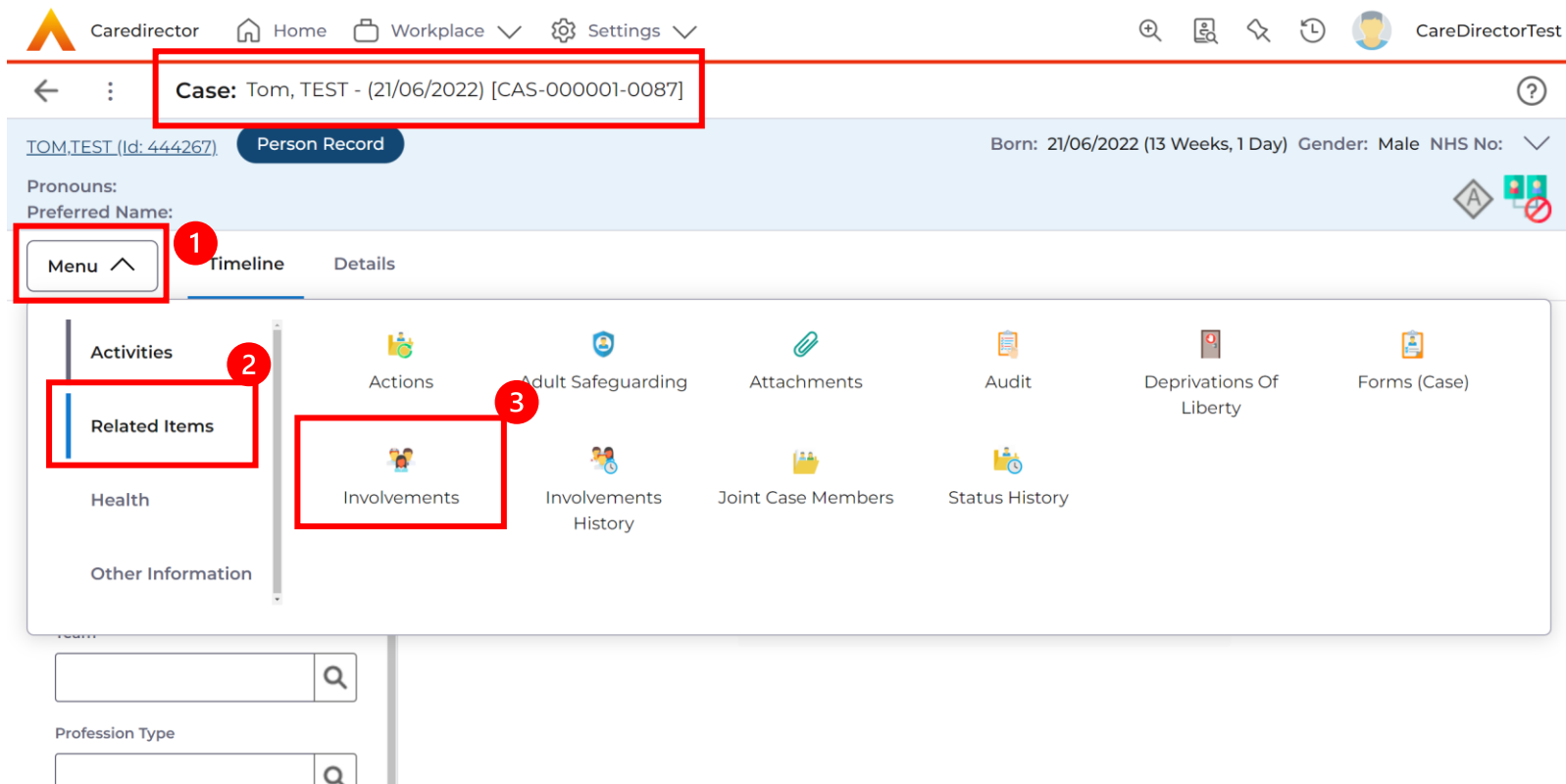
The screenshot shows the CareDirector interface for a 'Form (Case)'. The breadcrumb trail includes 'Home', 'Workplace', and 'Settings'. The main header shows the case title: 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, there's a 'Person Record' section with details like 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Details' tab is active, and the 'General' section contains several fields: 'Case' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Responsible Team' (CareDirectorTest), 'Form Type' (AMHP Report Form), 'Responsible User' (Scott Simpson), 'Status' (Complete), 'Start Date' (21/09/2022), 'Preceding Form', 'Due Date', and 'Review Date'. A red box highlights the 'Status' dropdown menu, and a red circle with the number '1' is placed over it. Another red box highlights the 'Save' button in the top navigation bar, with a red circle and the number '2' next to it.

11. The form will automatically close (there is no need for Manager sign-off). The Case can now be fully closed.

Appendix 4 - How to close a Case (Close and Log as Enquiry)

Appendix 4.1 - Ending Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.
2. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements**.



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

The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the person record details are shown: 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. There are tabs for 'Menu', 'Timeline', and 'Details'. The 'Case Involvements' section is highlighted with a red box and contains a table with the following data:

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

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

The screenshot shows the 'Case Involvement' form in the CareDirector V6 AMHP system. The form is titled 'Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...'. The form is divided into several sections:

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

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

Appendix 4.2 - Close an Open Activity

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

The screenshot shows the CareDirector interface for a case record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the patient information is displayed: '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 the number 1. The 'Activities' option in the left sidebar is highlighted with a red box and the number 2. The main content area shows a row of activity options: 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks', which are collectively highlighted with a red box and the number 3. Below the activity options, there are several search and filter fields for 'Responsible User', 'Responsible Team*' (set to 'AMHP Coordinator'), '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.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The interface includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case header shows 'TOM,TEST (Id: 444267)' and 'Person Record' tab. Below the header are tabs for 'Menu', 'Timeline', and 'Details'. A 'Tasks' section is visible with a search bar and a table of tasks. The table has columns: Subject, Due, Status, Regarding, Reason, Responsible Team, and Responsible User. The first task, 'Referral has been Allocated', is highlighted with a red box.

<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 shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. On the right, there are search, refresh, and user profile icons, with the user name 'CareDirectorTest'. Below this is a toolbar with a back arrow, a save icon (marked with a red box and '3'), a three-dot menu (marked with a red box and '1'), and a task title 'Task: Referral has been Allocated'. A context menu is open from the three-dot menu, with the 'Complete' option highlighted (marked with a red box and '2'). Other options in the menu include Clone, Cancel, Restrict Access, Delete, Run Workflow, and Copy Record Link. Below the toolbar, there is a header for 'Person Record' with details like 'TOM,TEST (Id: 444267)', 'Born: 21/06/2022 (13 Weeks, 1 Day)', and 'Gender: Male'. The main content area has a 'General' section with a 'Subject' field containing 'Referral has been Allocated' and a 'Description' field with a rich text editor toolbar. The toolbar includes options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Table, Undo, Redo, Search, and Source. A character count 'Characters (with HTML): 0/100000' is visible at the bottom right of the description field.

Appendix 4.3 - Close and Log as Enquiry

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. A search bar contains 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the user profile 'TOM,TEST (Id: 444267)' is shown with a 'Person Record' button. The 'Details' tab is selected and highlighted with a red box and a red circle with the number '1'. The 'Assignment Information' section is visible, with the 'Case Status' dropdown menu highlighted by a red box and a red circle with the number '2'. The dropdown menu is open, showing 'Assign To Team'. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team' (set to 'AMHP Coordinator'), and 'Review Date'.

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


Caredirector Home Workplace Settings

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

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

Menu Timeline **Details**

Assignment Information

Case Status*  **1**

Assign To Team

Case Priority

Responsible User

Responsible Team*

AMHP Coordinator

Review Date

3. This will open a new window, to **Close and Log as Enquiry**. Select that option. Then select **OK**.

The screenshot shows the CareDirector interface with a 'Case Statuses' dialog box open. The dialog title is 'Case Statuses' with the subtitle 'Enter your search criteria.' It features a 'Look in' dropdown menu set to 'Social Care Case Status Lookup View' and a search input field containing 'Search for records'. Below the search field is a table with columns for 'Name', 'Code', and 'Gov C'. The table lists several status options, each with a checkbox. The option 'Closed & Logged As Enquiry' is checked and highlighted with a red box, with a red circle '1' next to it. Other options include 'Awaiting allocation (unscheduled revi...', 'Closed', 'Closed as a Contact', 'Closed Under Review', 'Closure Request Rejected', and 'Closure Requested'. At the bottom of the dialog, there are navigation arrows, 'Page 1', and '1 - 13'. The 'OK' button is highlighted with a red box and a red circle '2', and the 'Close' button is also visible.

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

Caredirector Home Workplace Settings Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] CareDirectorTest

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

Menu Timeline **Details**

Assignment Information

Case Status* Closed & Logged As Enquiry	Close Date* 21/09/2022 13:26
Case Priority	Closure Reason*
Responsible User	Closure Accepted By*
Responsible Team* AMHP Coordinator	Archive Date*
Review Date	

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

Caredirector Home Workplace Settings Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] CareDirectorTest

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

Menu Timeline **Details**

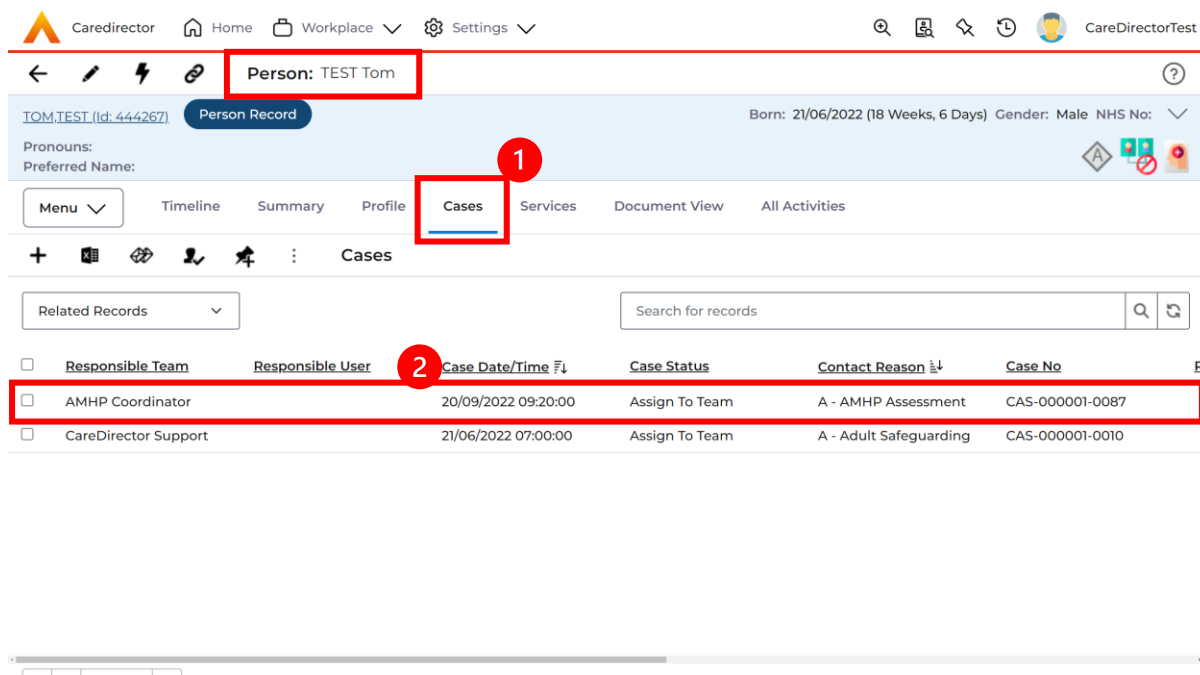
Assignment Information

Case Status*	Closed & Logged As Enquiry	Close Date*	21/09/2022 13:26
Case Priority		Closure Reason*	All Work Completed
Responsible User		Closure Accepted By*	Scott Simpson
Responsible Team*	AMHP Coordinator	Archive Date*	21/09/2022
Review Date			

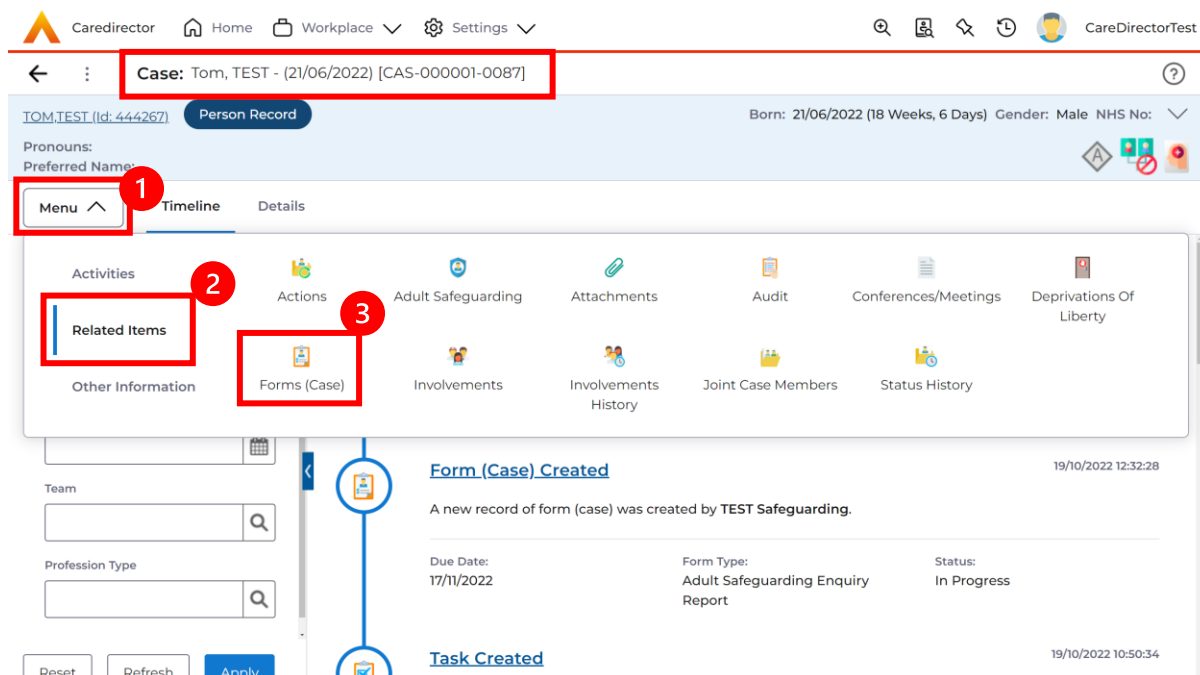
Appendix 5 – How to Transfer (Change Ownership) of a Case

Appendix 5.1 - AMHP Assessment Case Process

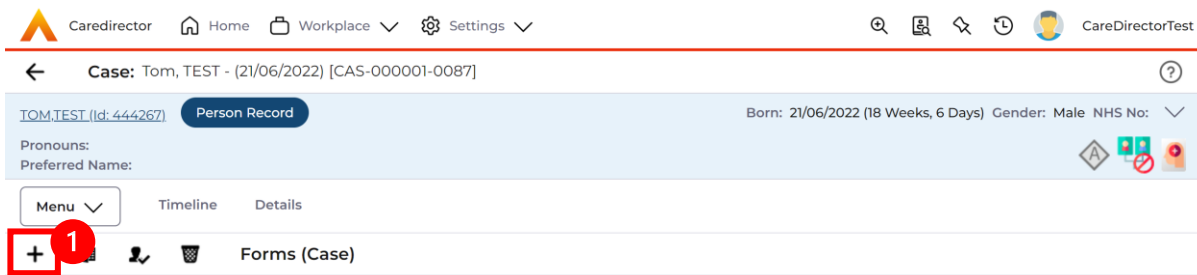
1. Locate the **AMHP Assessment Case** through the **Person Record** or through your **Dashboard** and open it.



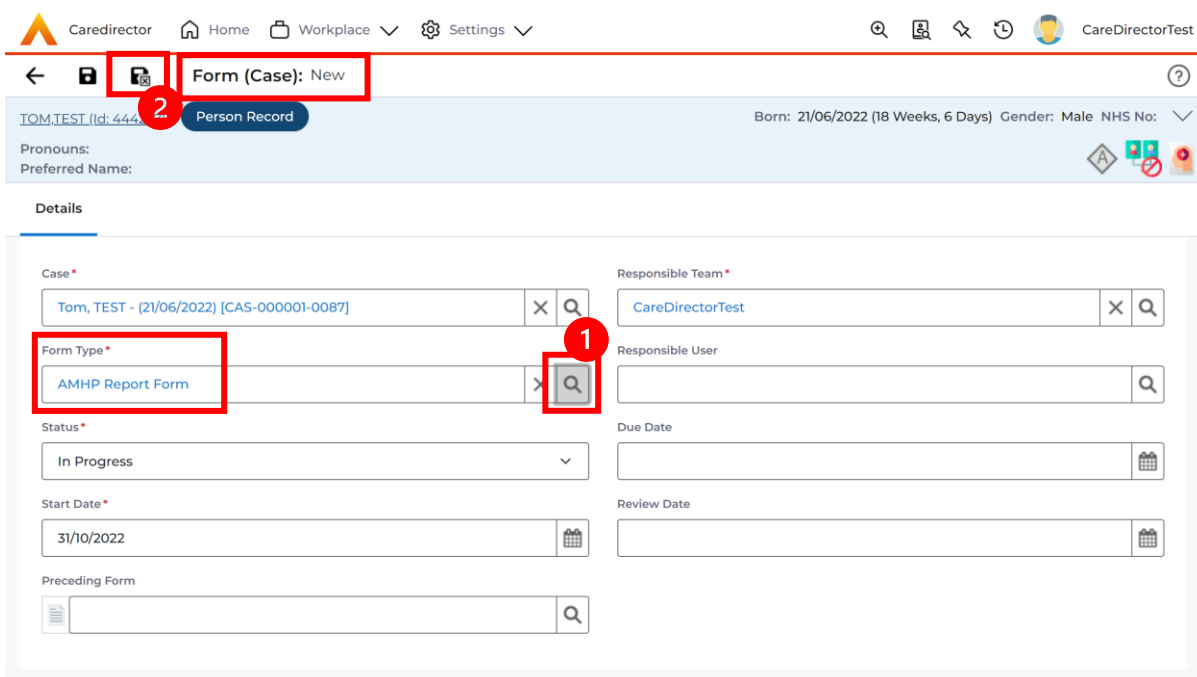
2. Once opened, we need to add the **AHMP Form**. Select **Menu**, **Related Items** and then **Form (Case)**.



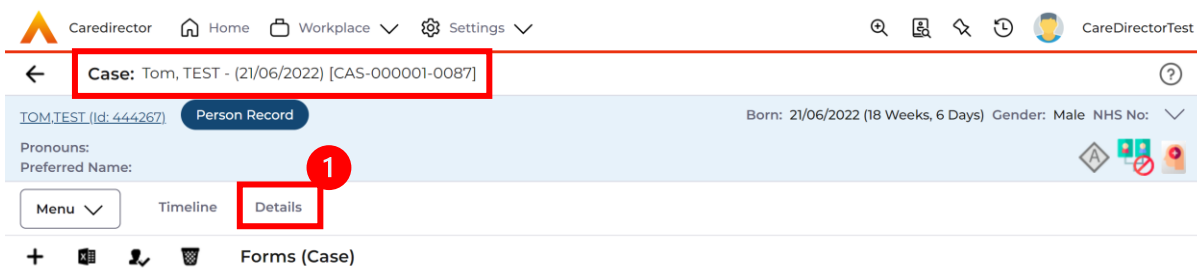
3. Select the **Create New Record** from the toolbar.



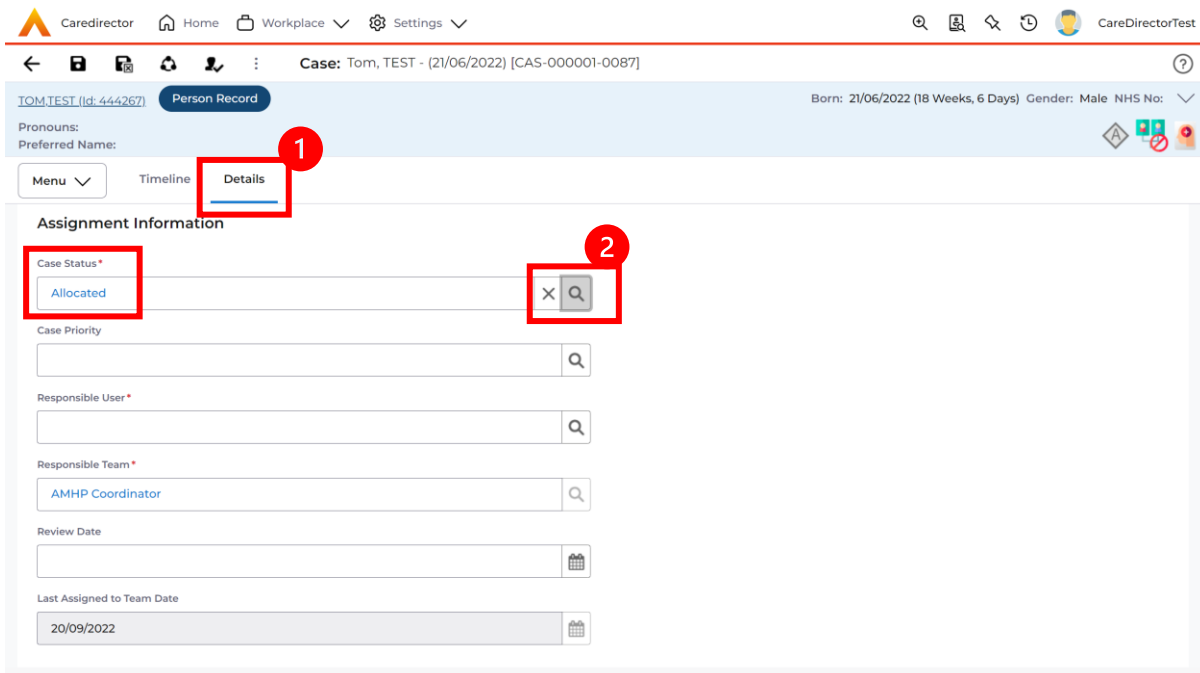
4. Under **Form Type** select **AMHP Report Form** and fill in the other mandatory fields. Once done select **Save and Return to Previous Page**.



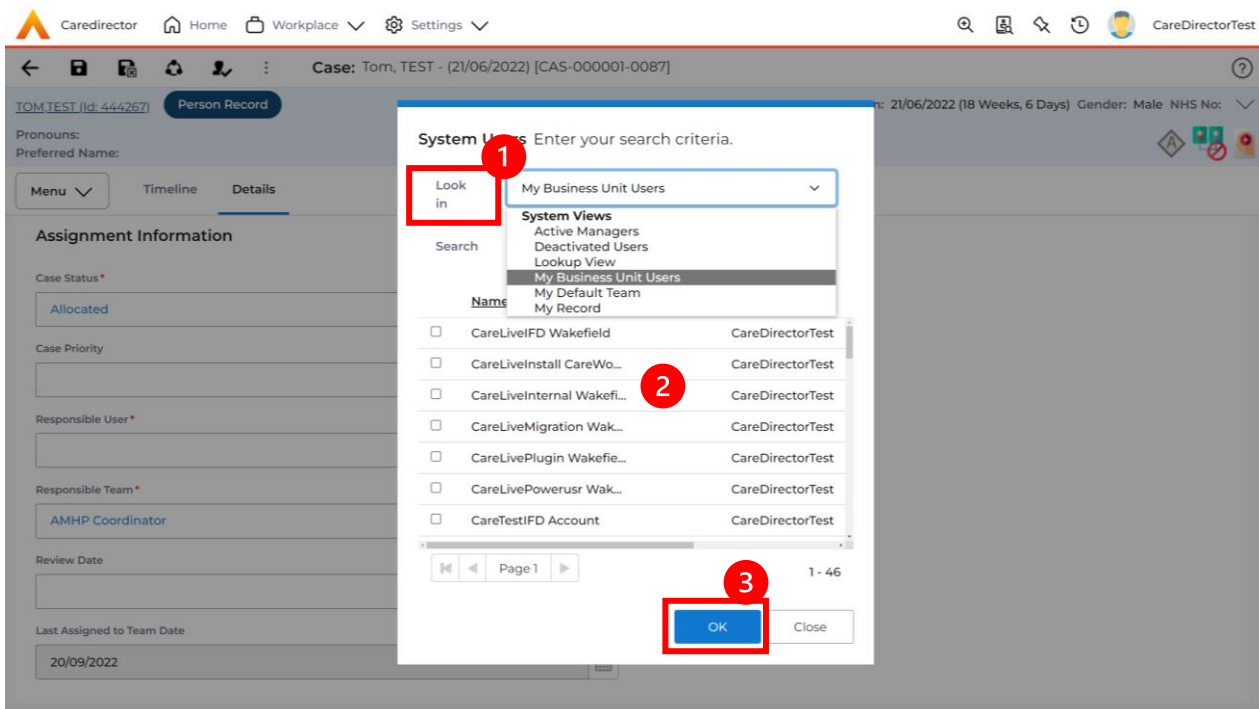
5. Once you returned to the **Case Record** select the **Details** tab. We need to now **allocate the Responsible User**.



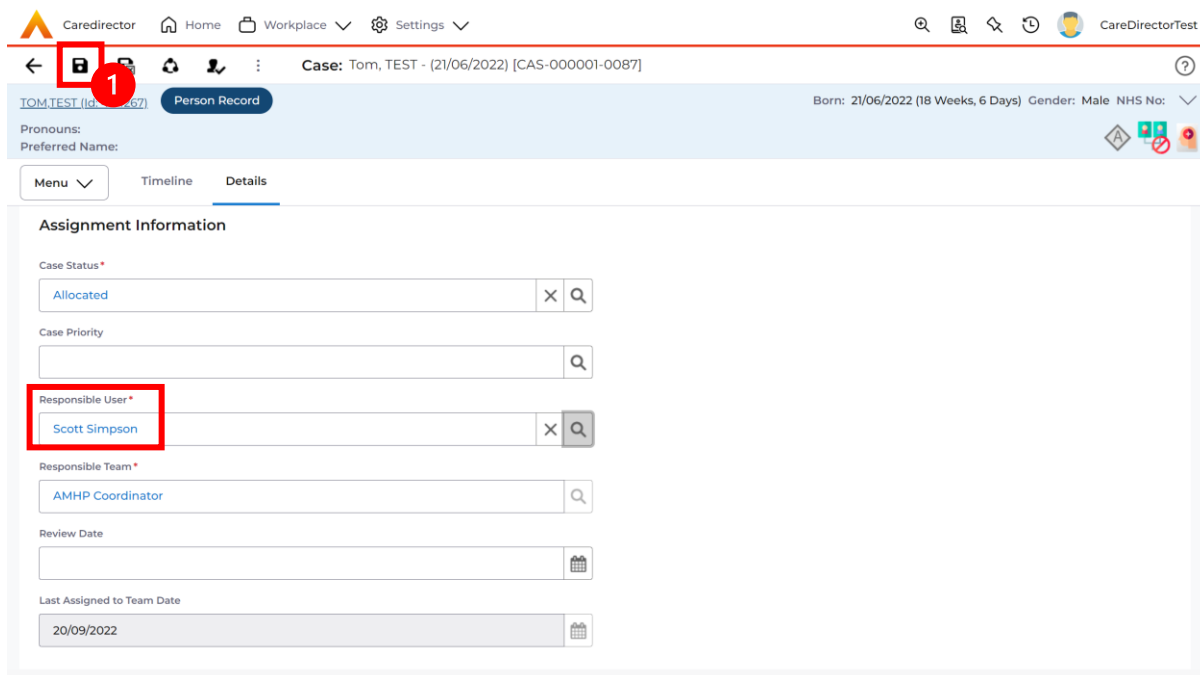
6. Scroll down to **Assignment Information** and change the **Case Status** next to **Lookup function** and change the **Status** to **Allocated**.



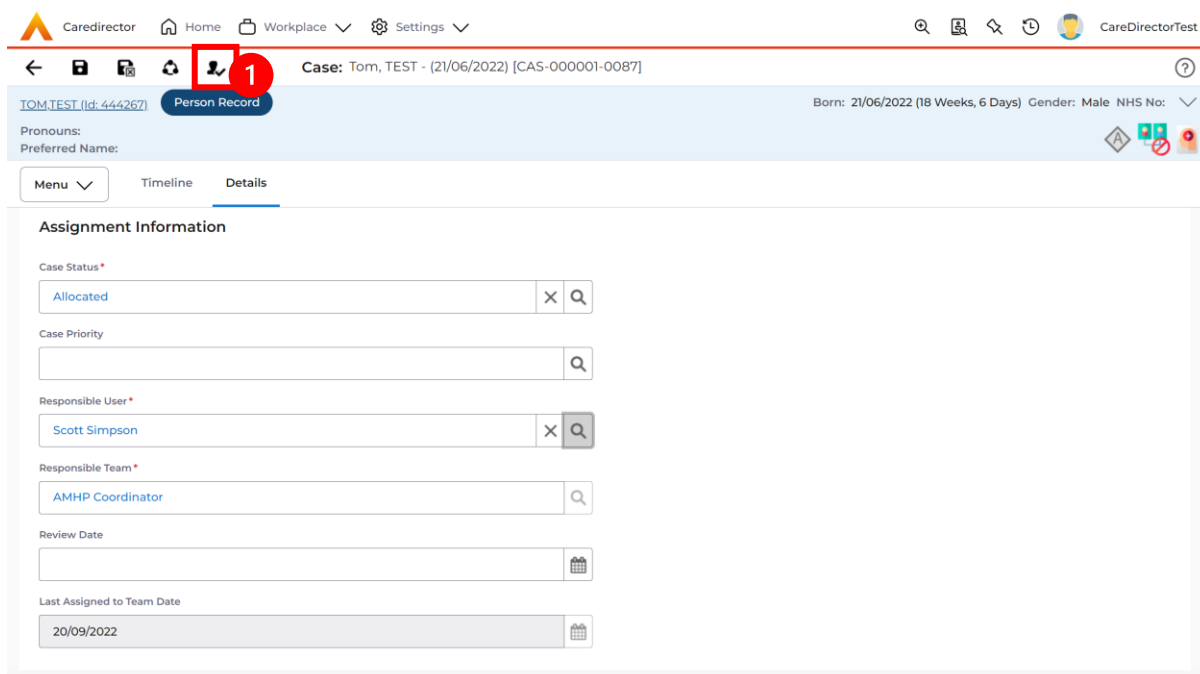
7. This will set the **Responsible User** field to mandatory for the system before it allows you to **Save**. Use the **Lookup function** and within this the **Look in** field will change who you can search for. Utilised this, changing it to **Lookup View** will search across the entire database. When selected, press **OK**.



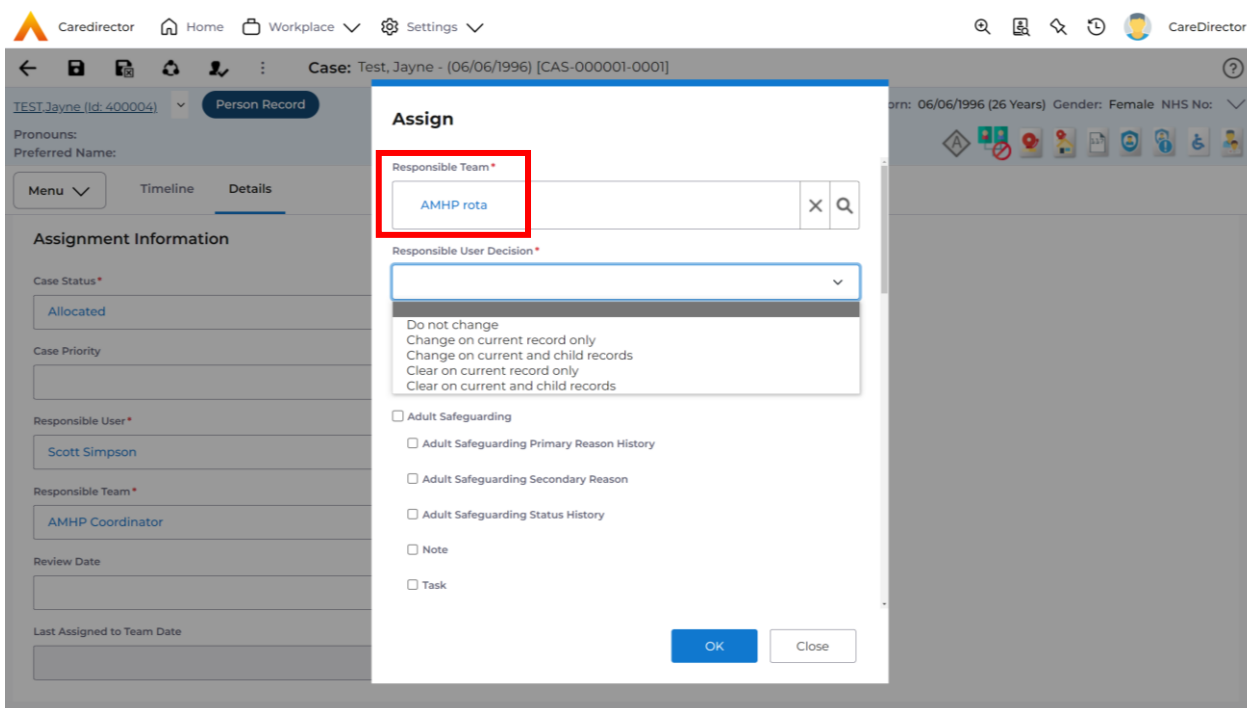
8. Once you have selected the **Responsible User** who will look at this **Case** and **AMHP Report Form**, select **Save** from the toolbar.



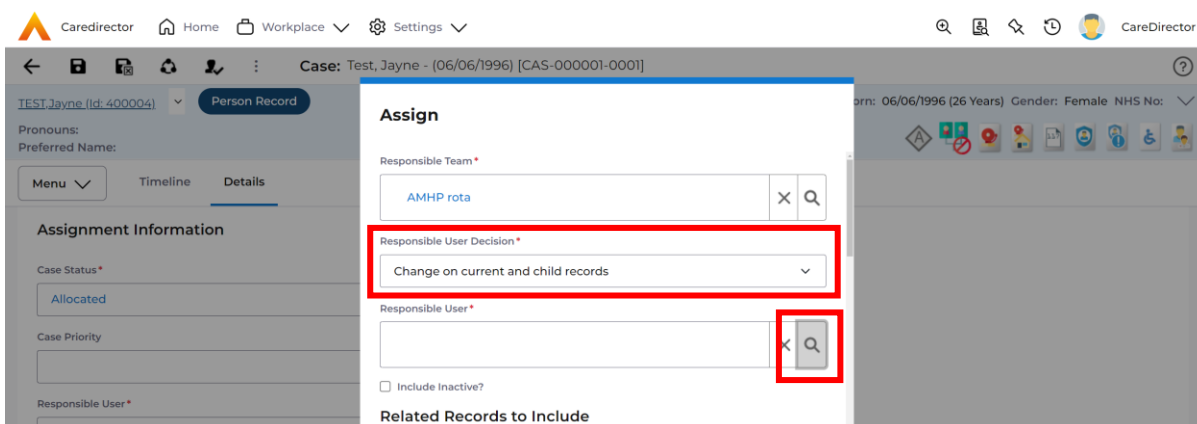
9. However, we need to change the **Responsible Team**. To do this, select the **Assign this record to another team** from the toolbar.



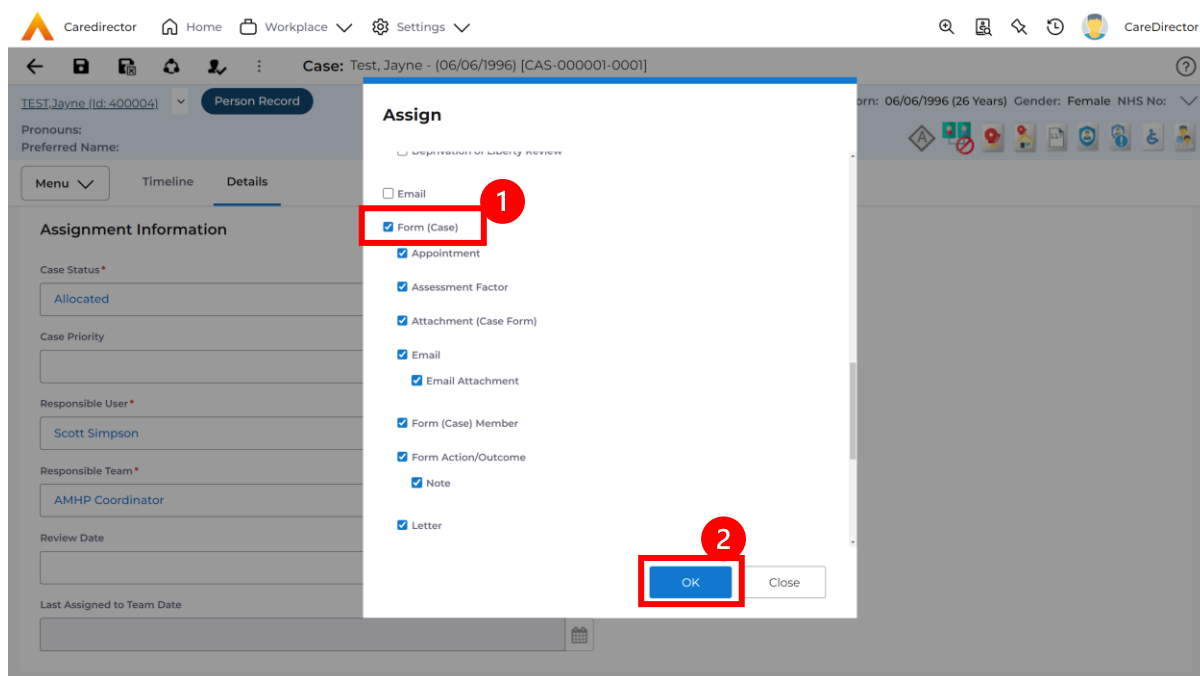
10. This will open a separate window that will ask you who the new **Responsible Team** will be and what to do about the **Responsible User**. **Responsible Team** select the **Responsible Team** that the **Responsible User** is part of.



11. Next, we need to decide what we are doing about the **Responsible User**. Even though we have already chosen the relevant worker, we still need to make sure that the **AMHP Report Form** is being allocated to that worker too. Therefore, you need to select **Change on Current and Child Records** under the **Responsible User Decision**. This will give another field using skip logic, that you need to choose that **Responsible Users** name again. This time, when you select the **Lookup** function it will show you a list of users that are part of team you selected.



12. Before we select **OK** we need to tell the system which **CHILD** records we want it to be changed on. Due to us only adding the **AMHP Report Form** we need to scroll down on **Related Records to Include** section and select **Form (Case)** checkbox. Once you select **Form (Case)** it will select the rest automatically. Now select **OK**.



13. It will automatically **Save** but it is good practice to **Save** your work with **CareDirector** not having the automatic save feature. This will change the **Responsible Team/ User** of the **Case** to the relevant worker and change the **Responsible Team/ User** of the **AMHP Report Form** that we created earlier.

Appendix 6 – Recording an Activity

1. From the selected Case select **Menu**, **Activities** and then your chosen activity.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The breadcrumb trail is highlighted with a red box. The 'Menu' button is circled in red with a '1', and the 'Activities' option in the dropdown menu is circled in red with a '2'. The main content area shows a notification: 'A new record of form (case) was created by Scott Simpson.' Below this, the form details are displayed: 'Due Date:', 'Form Type: AMHP Report Form', and 'Status: In Progress'.

2. Select the **Create New Record** on the toolbar of the selected task. When the information has been completed select the **Save**.

The screenshot shows the CareDirector interface for a specific case. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the case name: 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, a light blue header bar contains personal information: 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 2 Days)', 'Gender: Male', and 'NHS No:'. There are also icons for pronouns and preferred name. Below the header, there are tabs for 'Menu', 'Timeline', and 'Details'. A toolbar labeled 'Tasks' is visible, with a red box highlighting the plus sign icon. Below the toolbar, there is a search bar for 'Related Records' and a search input field. At the bottom, a table lists tasks with columns for Subject, Due, Status, Regarding, Reason, and Responsible Team.

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

3. Ensure that you enter a **Subject** heading that enables anyone searching that activity to easily identify it from the list of activities.
4. If you do not want anyone to go into the activity and edit it, you can **Mark as Complete** located on the toolbar or change the status as **Completed**.
5. If you just **Save and Return to Previous Page**, it will remain open and therefore yourself or anyone else will be able to update or edit it.
6. When an activity is recorded for information only and does not require further action you should always **Mark as Complete**.
7. However, there may be times when you need someone else to do something on the system and you can alert them by interesting an activity and changing the **Responsible User** to them. This way it will appear in their list of activities on their workplace dashboard.

Appendix 6.1 – How to Mark as Complete

1. Before you save your activity after you complete it, there will be a **Mark as Complete** option available on the toolbar.

The screenshot displays the CareDirector user interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. On the right, there are search, print, share, and refresh icons, along with a user profile icon labeled 'CareDirectorTest'. Below this is a secondary toolbar containing a back arrow, a save icon, a document icon, a checkmark icon (highlighted with a red box and a red circle containing the number '1'), and a close 'X' icon. The main content area shows a 'Task: New' header. Below the header, there is a light blue bar with the text 'TOM,TEST (Id: 444267)', a 'Person Record' button, and patient information: 'Born: 21/06/2022 (13 Weeks, 2 Days) Gender: Male NHS No:'. Below this bar, there are fields for 'Pronouns:' and 'Preferred Name:'. The main content area is titled 'Details' and contains a 'General' section with a 'Subject*' field (containing 'Clear subject title') and a 'Description' field with a rich text editor toolbar. The toolbar includes icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, quote, link, unlink, insert link, insert image, insert table, insert video, insert audio, insert emoji, insert link, and insert source.

2. Alternatively, if you have saved the activity. Change the Status to **Complete**. Then **Save**.

Caredirector Home Workplace Settings CareDirectorTest

Task: New

TOM,TEST (Id: 444267) Person Record Born: 21/06/2022 (13 Weeks, 2 Days) Gender: Male NHS No: Pronouns: Preferred Name:

Details

Status*
Completed

Contains Information Provided By A Third Party?
 Yes
 No

Is Case Note?
 Yes
 No

Significant Event Details

Significant Event?
 Yes
 No

Appendix 6.2 – How to change Responsible User on an activity

1. Under **Responsible User** use the **lookup** option next to the field to change the responsible user. Then **Save**.

The screenshot shows the CareDirector interface for a 'Task: New' form. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. Below the navigation bar, there are navigation icons and a search bar. The main form area is divided into sections: 'Person Record' (with details like Born: 21/06/2022, Gender: Male, NHS No.), 'Details', and a task form. The task form has several fields: 'Regarding*' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Responsible Team*' (CareDirectorTest), 'Reason', 'Priority', 'Due*' (with a calendar icon), 'Status*' (Completed), 'Category', 'Sub-Category', 'Outcome', and 'Contains Information Provided By A Third Party?' (Yes). The 'Responsible User' field is highlighted with a red box and a red circle with the number '1' next to it. The 'Responsible User' field contains 'Scott Simpson'.

Version Control

Version Number	Change	Author	By Date
V1	Initial Start	Scott Simpson	22/09/2022