





How to add an Involvement

Document How to add an Involvement

Purpose This is how you add an involvement onto a record

Version V2

Owner ICT Business Transformation Team

Last Updated 22/05/2023



How to add an Involvement

- 1. Locate the **Record** you want to add your **Involvement** too. It can be done on multiple types of records, there is only one change to find it.
- 2. When you are on a **Record**, select **Menu**. Look for **Care Network** if you cannot find **Care Network** then look for **Related Items**. Underneath **Related Items** or **Care Network**, select **Involvements**.

Caredirector 🞧 Home	e 🛱 Workplace 🗸	🔞 Settings 🗸					• I 🕅 🛠	CareDirectorT	est
← : Case: Maisey,	Test - (19/11/2000) [C	AS-000001-0080]						?)
MAISEY,Test (ld: 444301) Y	Deceased		•		Born: 19/11/2000 Died: 31/0	8/2022 Age at Death:	21 Years Gender: Fema	le NHS No: 523 669 8081 🚿	/
Pronouns: She/He								🚸 🧟 🔮 🎍	
Menu 🔨 Timeline	Details							3	
Activities	1	٩	Ø	<u>e</u>		•	<u> </u>	*	Î
	Actions	Adult Safeguarding	Attachments	Audit	Conferences/Meetings	Deprivations Of Liberty	Forms (Case)	Involvements	1
Related Items		<u></u>	lio.						
Other Information	involvements History	Joint Case Members	Status History						
	龠				· · · · · · · · · · · · · · · · · · ·				-
Team			Form (Case) Created					31/08/2022 08:37:50	
	Q		A new record of form (case) wa	as created by Ma	tt Davies.				
Profession Type									
	Q	< l	01/09/2022		Occupational Therapy Ref	erral (Secondary	In Progress		
					Allocationy				
			Case Involvement Upda	ated				31/08/2022 08:31:33	
		Ý	Matt Davies changed End Dat	e from 'Empty' to	31/08/2022'.				
			Involvement Member:		Role:		Start Date:		
			community Occupational The	rapy Service	- secondary team		51/08/2022		
			Case Involvement Upda	ated				31/08/2022 08:31:26	
invirReset Refresh App	ly	Ŷ	Matt Davies changed End Dat	e from 'Empty' to	31/08/2022'.				

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

	Caredirector 🏠 Hom	ne 💍 Workplace	✓ 袋 Settings 、	\checkmark		€	P	\Diamond	€		CareDire	ectorTes	t
←	Case: Maisey, Test	- (19/11/2000) [CAS-	000001-0080]									?	ĺ
MAIS	SEY,Test (Id: 444301) ×	Deceased	Born	: 19/11/2000 D	ied: 31/08/2022 Age at Death: 21 Y	ears Ge	ender:	Fema	le NHS	5 No: 52	3 669 80	81 🗸	
Pron Prefe	ouns: She/Her erred Name:									$\langle A \rangle$	0	2	
M	Timeline	Details											
+	SI 2, 17	Case Involveme	nts										
Re	elated Records 🗸 🗸				Search for records						C	23	
	Involvement Member 🗐	Role	Involvement Re	Case		<u>Resp</u>	onsible	Team	<u>1</u>	Star	<u>t Date</u> ≓↓		E
	Sensory Impairment Te	* Secondary Team		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Sense	ory Imp	pairme	nt Te	31/08	8/2022		3
	Community Occupatio	* Secondary Team		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Com	munity	Occu	patio	31/08	3/2022		3
	Matt Davies	Responsible User		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Carel	Directo	rTest		30/0	8/2022		3(
	Matt Davies	Responsible User		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Carel	Directo	rTest		30/0	8/2022		
	Matt Davies	* Secondary Wor		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Carel	Directo	rTest		30/0	8/2022		3



4. Under **Role** select the appropriate involvement to the **record**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save**.

tails				
ieneral				
ase *			Responsible Team *	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	×	Q	CareDirectorTest X	(Q
arson*			Involvement Priority	
TEST Tom	×	Q		Q
volvement Member*			Involvement Status	
Peter King	×	Q		Q
ole*			End Date	
* Secondary Worker	×	Q		Ê
art Date*			olvement End Reason	
04/10/2022		m		Q
volvement Reason			Involvement Review Date	
		Q		Ê



CAREDIRECTOR HOW TO ADD AN INVOLVEMENT

Version	Change	Author	By Date
V1	INITIAL START	SS	13/11/2022
V2	Format changes: - Version Control Remove Version	SS	22/05/2023

Version Control