



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**.

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	3
<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 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**.

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'. The 'Involvement Member' field is also highlighted with a red box and a red circle containing the number '2'. The form includes fields for Case, Person, Involvement Member, Role, Start Date, Involvement Reason, Responsible Team, Involvement Priority, Involvement Status, End Date, Involvement End Reason, and Involvement Review Date. The 'Role' field currently displays '* Secondary Worker'. The 'Involvement Member' field displays 'Peter King'. The 'Start Date' field displays '04/10/2022'. The 'Responsible Team' field displays 'CareDirectorTest'. The 'Involvement Priority' and 'Involvement Status' fields are empty. The 'End Date', 'Involvement End Reason', and 'Involvement Review Date' fields have calendar icons. The 'Description' field is at the bottom of the form.

Version Control

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