



Adults Triage Team

Document CareDirector Adults Triage Team Bespoke Guide.
Purpose Adults Triage daily tasks on CareDirector.
Version V2
Owner ICT Business Transformation Team/ Adults System Support
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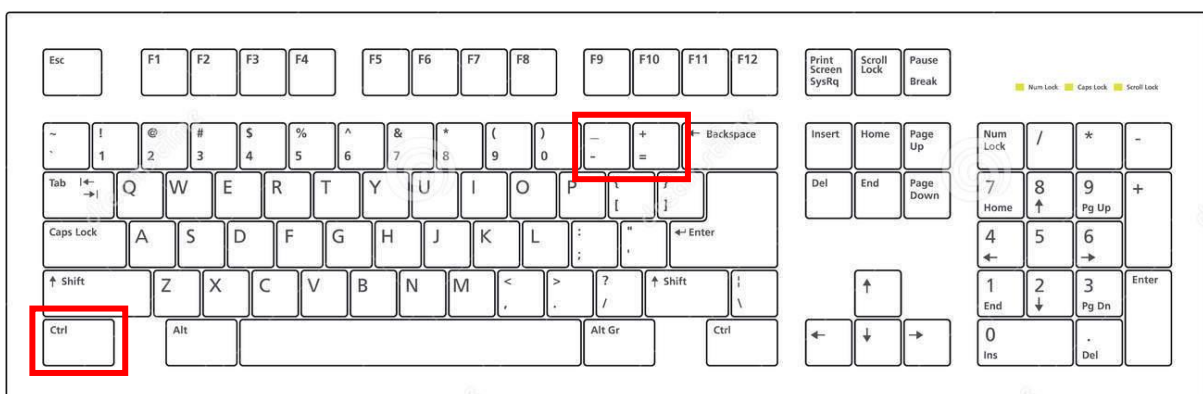
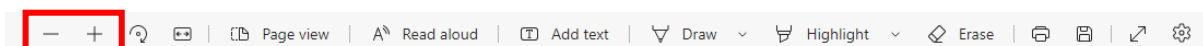
Guide Information

Before Live Access...

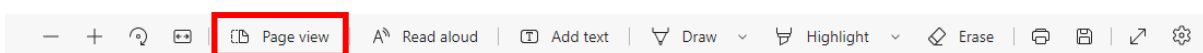
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

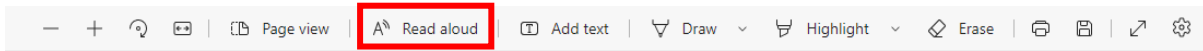
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



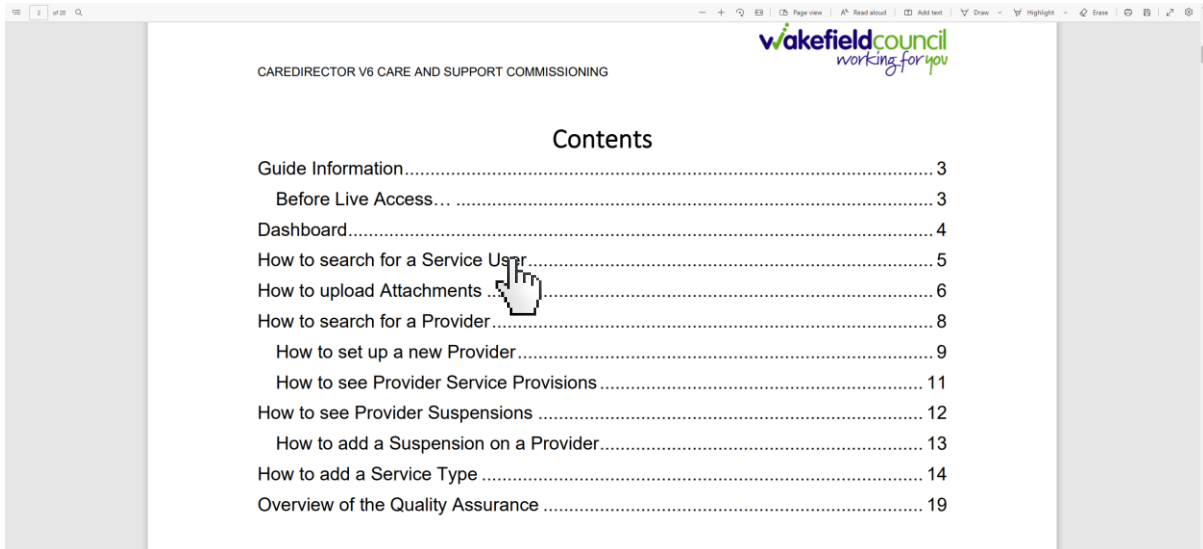
3. To put pages next to one another, select the **Page View** icon on the toolbar.



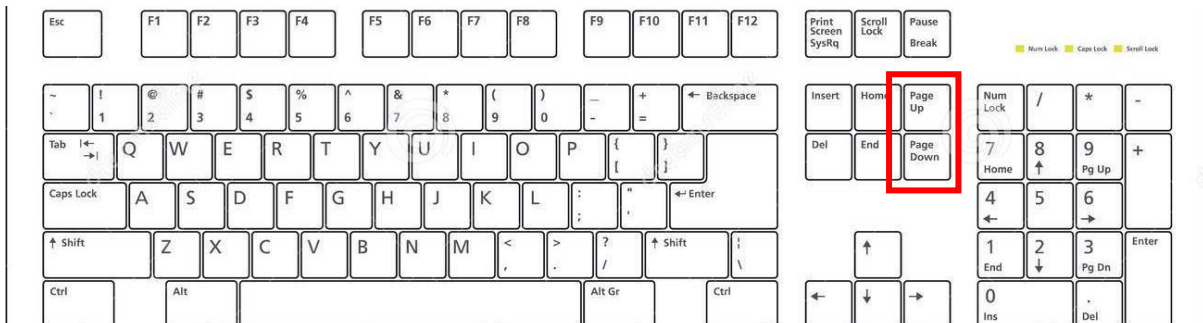
4. For auditory assistance, select **Read Aloud** from the toolbar.



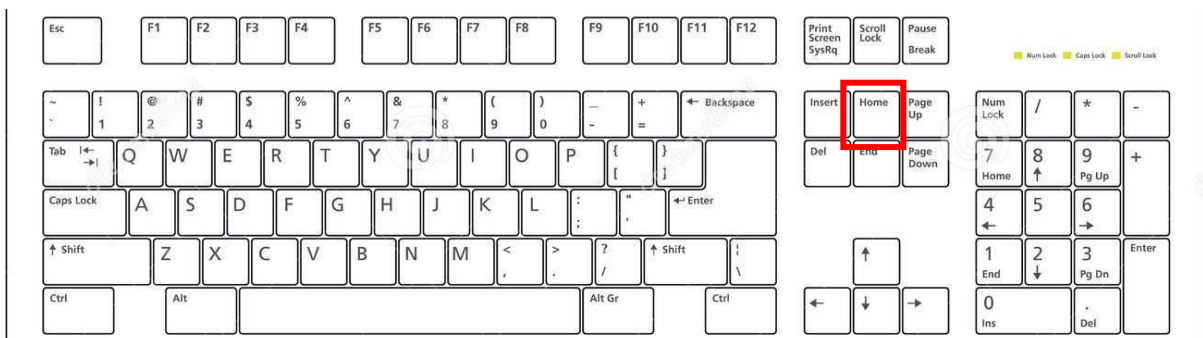
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

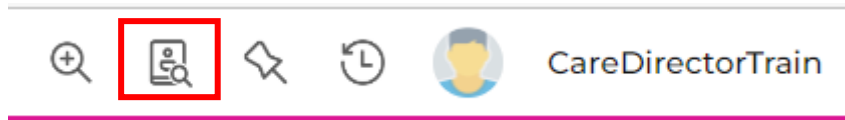


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

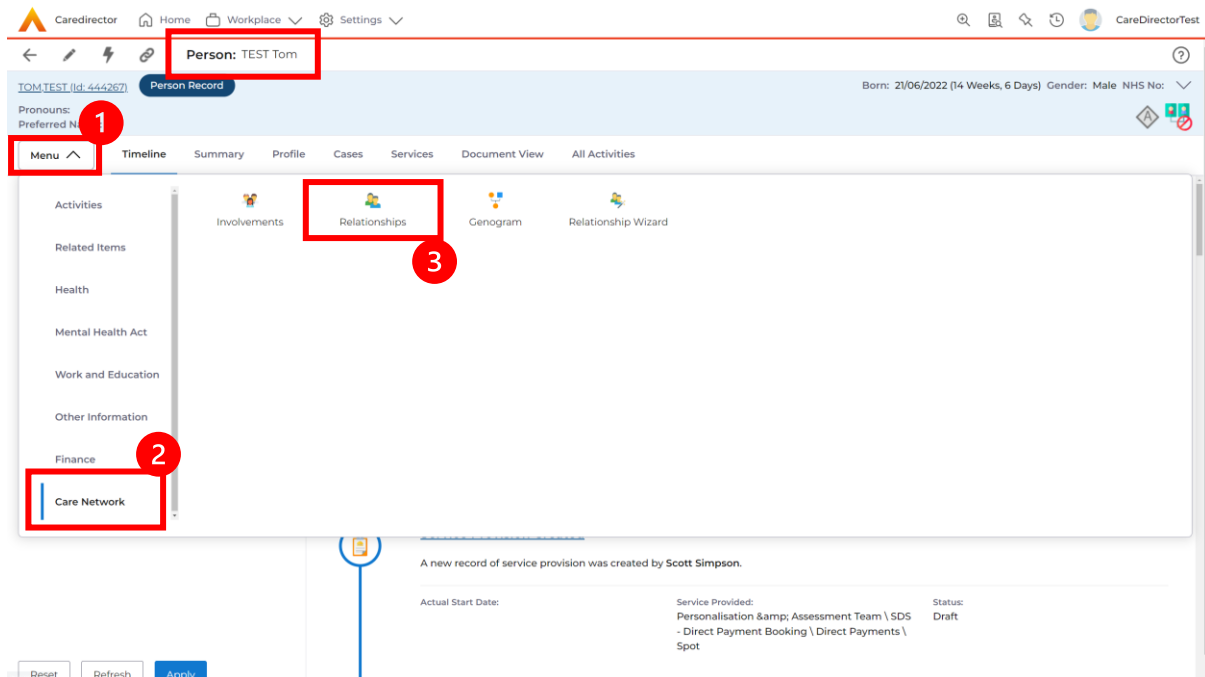
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case)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

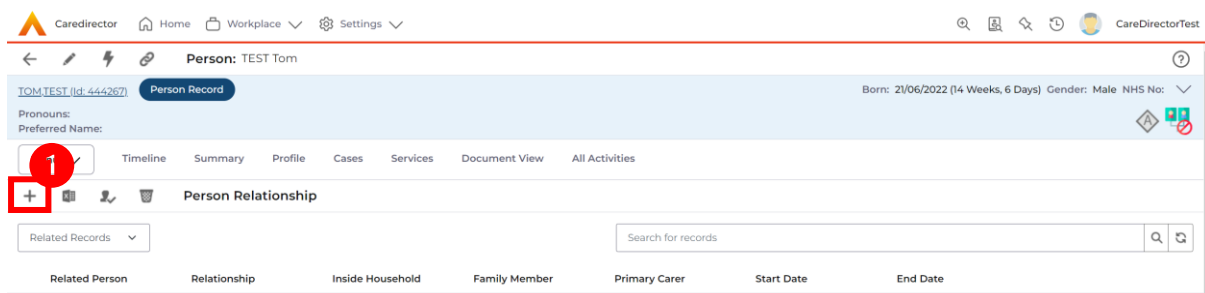
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no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

is a*

To*

Reciprocal Relationship

Person

is a*

To

Relationship Details

Start Date* Responsible Team*

End Date

Description

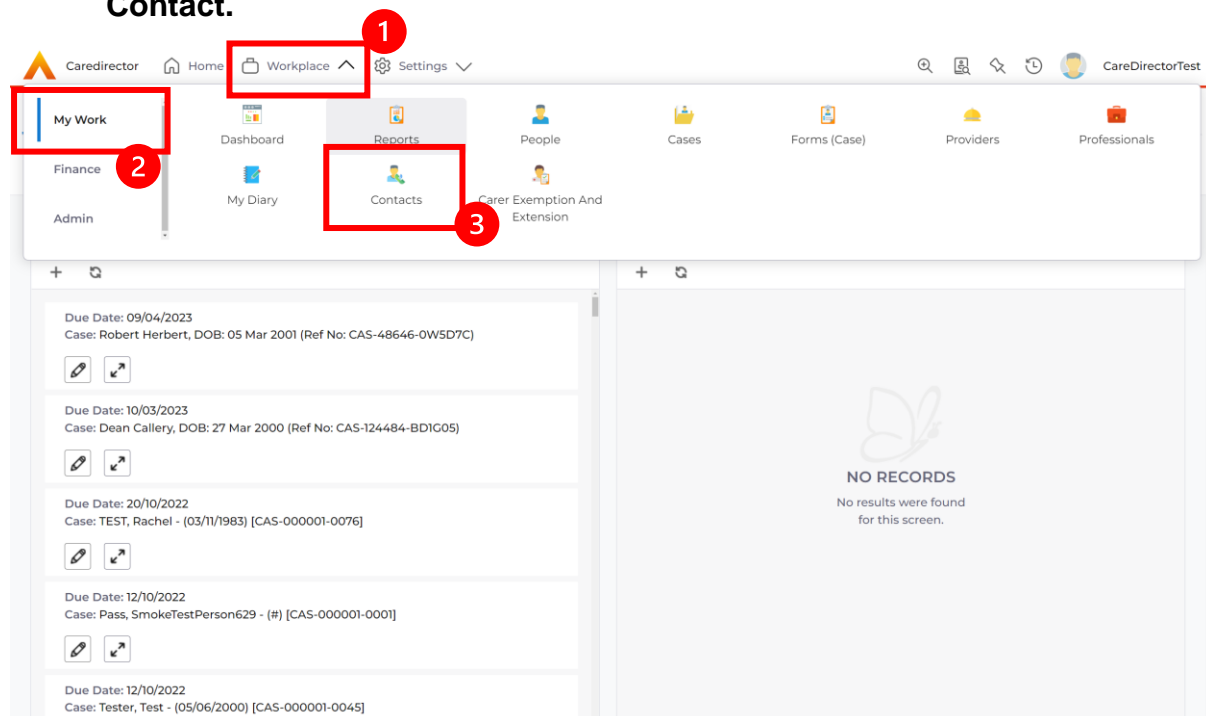
Nature of Relationship to Primary Person

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

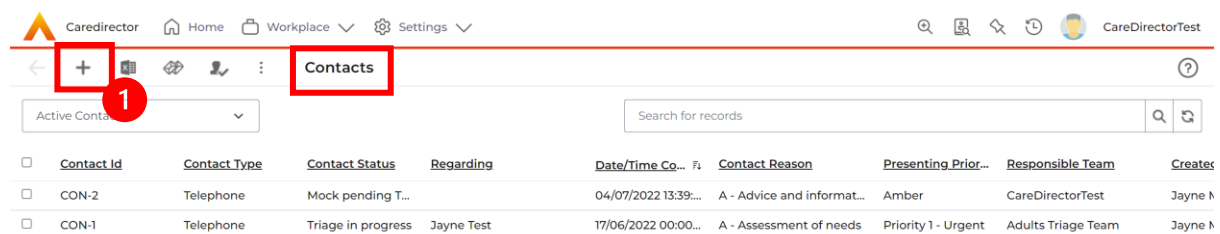
4. When finished, select **Save and Return to Previous Page**.

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 is a dropdown menu for 'TOM.TEST (Id: 444267)' and a 'Person Record' button. The main content area is divided into a left sidebar and a main grid of icons. The sidebar has a 'Menu' button highlighted with a red box and a red circle '1'. The 'Related Items' option in the sidebar is highlighted with a red box and a red circle '2'. The 'Contacts' icon in the main grid is highlighted with a red box and a red circle '3'.

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

The screenshot shows the Caredirector interface with the 'Contacts' section open. The header bar includes navigation icons and the text 'Person: TEST Tom'. Below the header, there is a dropdown menu for 'TOM.TEST (Id: 444267)' and a 'Person Record' button. The main content area is divided into a left sidebar and a main grid of icons. The 'Contacts' icon in the main grid is highlighted with a red box and a red circle '3'. The 'Contacts' section is open, showing a table of related records. The table has columns for 'Contact Id', 'Contact Type', 'Contact Status', 'Regarding', 'Date/Time Contact R...', and 'Contact Reason'. One record is visible: 'CON-2', 'Telephone', 'Mock pending Triage', 'TEST Tom', '04/07/2022 13:39:00', and 'A - Advice and ir'.

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 contact record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The contact title is 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - ...'. Below this, the contact details are displayed: 'TOM.TEST (id: 444267)', 'Person Record', 'Born: 21/06/2022 (20 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A 'Menu' button is highlighted with a red box and a '1' in a red circle. Underneath, the 'Related Items' section is visible, with 'Activities' highlighted by a red box and a '2' in a red circle. Other related items include 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. Below the related items, 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 contact record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The contact title is 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - Family/Friend/Neighbour'. Below this, the contact details are displayed: 'TOM.TEST (id: 444267)', 'Person Record', 'Born: 21/06/2022 (20 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A 'Menu' button is highlighted with a red box and a '1' in a red circle. Below the menu, a toolbar contains a plus sign (+) button, which is highlighted with a red box and a '1' in a red circle. Other toolbar icons include a trash can and a task icon. Below the toolbar, there are input fields for 'Related Records' and 'Search for records'. At the bottom, a table header is visible 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.

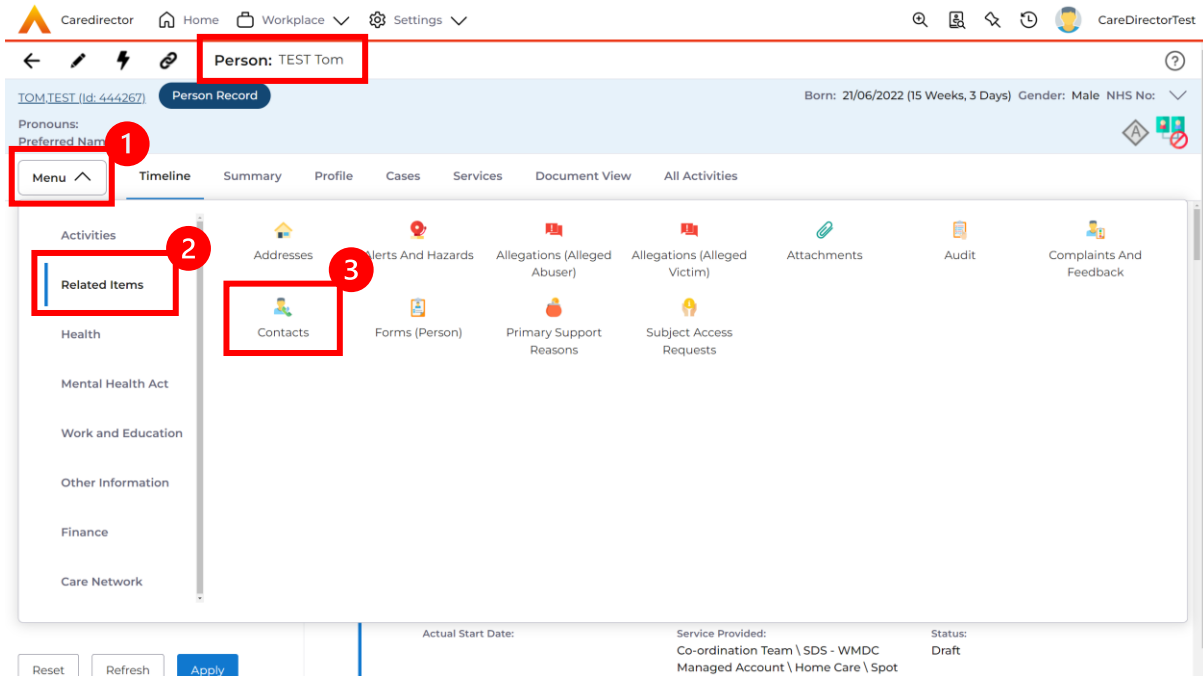
The screenshot shows the 'Person Record' page for 'TOM TEST (id: 444267)'. The contact information is as follows:

- Contact Id:** CON-2
- Responsible Team:** CareDirectorTest (marked with a red '1')
- Regarding:** TEST Tom (highlighted with a red box)
- Responsible User:** Jayne Mullen
- Date/Time Contact Received:** 04/07/2022 at 13:39
- Contact Type:** Telephone
- Contact Source:** Individuals - Family/Friend/Neighbour
- Contact Made By:** 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 same contact details page, but with a yellow warning banner at the top: "Some data is not correct. Please review the data in the Form." The 'Contact Source' and 'Contact Made By' fields are visible. The 'Is the Person/Group aware of the Contact?' field is highlighted with a red box and has a red '1' callout. The field is currently set to 'Yes'.

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



How to create a Person Record

Duplicate Detection

1. Before a **Person Record** can be created a **Person Search** must be done.
2. If **Person Record** is present, after you select the **Create New Record** it will show a warning.
3. If No Record is present, the **Searches Before Create Allowed** will turn to 0 and the grey **Create New Record** button will be **highlighted** on the toolbar.

←
+
Searches Before Create Allowed : 1

First Name

Middle Name

4. Select the **Created New Record** button and create a Person record.



Adding a Person Record

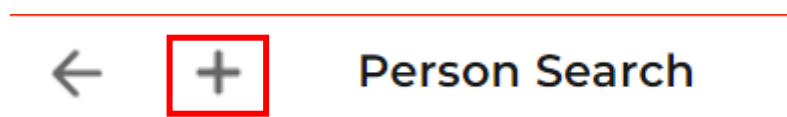
1. Select **Person Search** on the toolbar.



2. Search person to check for record.

It is required of users to perform at least one search of an existing Person Records before they can create a new one.

3. If an existing record is not found, select the now highlighted **Create new record** button on the toolbar.



4. The Person: New record is displayed.

5. Complete the fields as required. Mandatory fields are marked with a red asterisk.

6. When the information has been entered, select the **Save** button on the toolbar.

7. The **Person Record** will then be displayed.

The screenshot shows the CareDirector software interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. On the right, there are search and user icons, and the text 'CareDirectorTrain'. Below the navigation bar, the breadcrumb path is 'Person: Tom MullenTest'. The main content area is titled 'Person Record' and shows the name 'MULLENTEST Tom (Mr) (id: 2)' and 'Preferred Name:'. To the right, it displays 'Born: 03/05/1912 (110 Years) Gender: Male NHS No:'. Below this, there is a menu with options: 'Timeline', 'Summary', 'Profile', 'Cases', 'Care Plans', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is selected, showing two events: 'Person Address Created' and 'Person Created', both dated 20/05/2022 08:09:14. The 'Person Address Created' event includes details for Address Type (Primary), Property Type (Privately Owned), and Street (Street and Broadway). The 'Person Created' event includes details for Age (110), Home Phone, and Mobile Phone (212-970-4133). On the left side of the timeline, there are input fields for 'From', 'To', 'Team', and 'Profession Type', along with 'Reset', 'Refresh', and 'Apply' buttons. A 'No more records to display' message is shown at the bottom of the timeline.

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 selected and 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 selected and highlighted with a red box. Below the tab, there is a search bar and a table of related records. The table has the following columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', 'Case Status', and 'Case No'. The first three rows of the table are highlighted with a red box and a red circle containing the number 2.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Case No
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Sc
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**.

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail is 'Person: Tom MullenTest'. The 'Cases' tab is selected, and a red box highlights the '+ Create New Record' button. Below the tabs, there is a search bar for records and a table of related records.

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

The screenshot shows the 'Case: New' form in the CareDirector interface. The breadcrumb trail is 'Case: New'. The form is titled 'Details' and contains several sections for entering case information.

Contact Details

Case No *

Person *

Case Date/Time *

Initial Contact

Date/Time Contact Received *

Contact Received By *

Contact Reason *

Presenting Priority

Additional Information

Referral Reason

How to check the Case Status

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

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	Scot
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case is Allocated, Closed Under Review, etc.**

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 [x] [Q]

Case Priority [input] [Q]

Responsible User [input] [Q]

Responsible Team *
AMHP Coordinator [Q]

Review Date [calendar icon]

Last Assigned to Team Date
20/09/2022 [calendar icon]

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 set to 'Assign To Team'. A red box highlights the 'Case Status' field with a '1' in a red circle. A magnifying glass icon next to the field is highlighted with a red box and a '2' in a red circle.

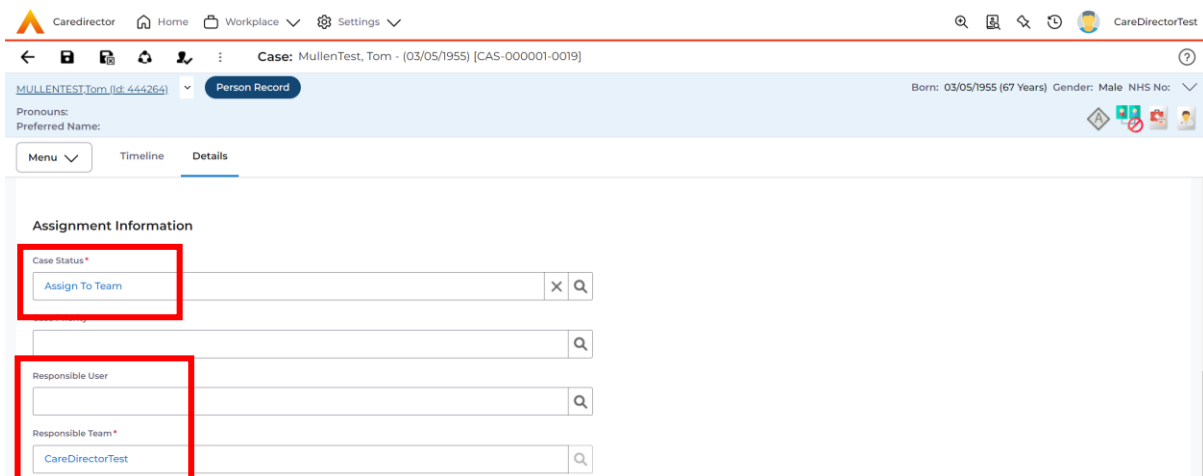
2. Choose the relevant option and select **OK** when found. Select **Save**.

The screenshot shows the 'Case Statuses' lookup dialog box. The dialog box is titled 'Case Statuses Enter your search criteria.' and shows a list of case status options. The 'OK' button is highlighted with a red box and a '2' in a red circle.

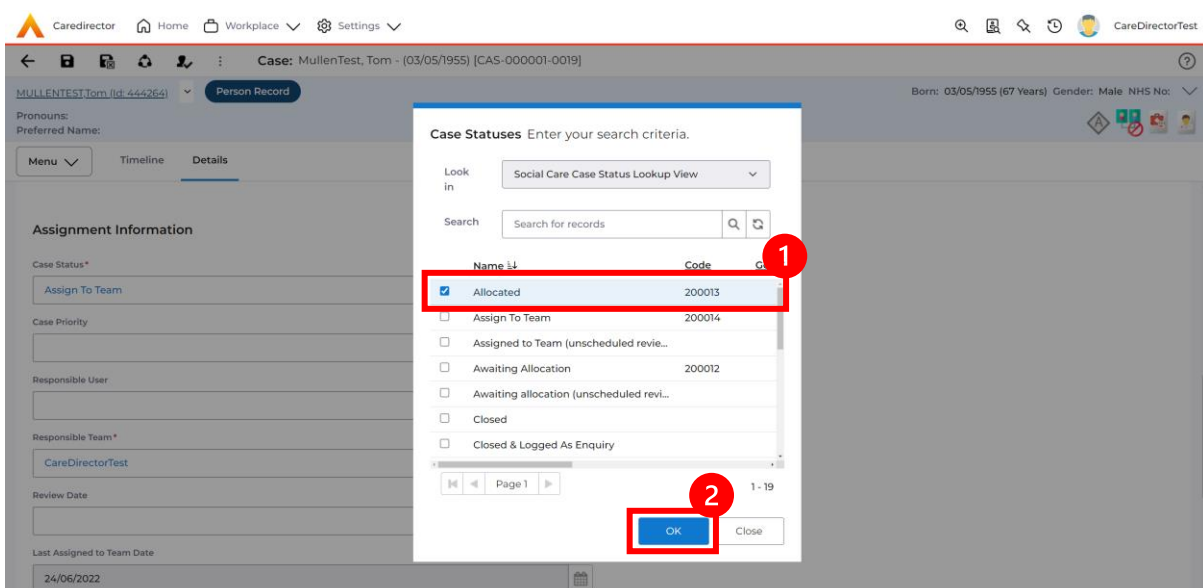
Name	Code	Gov C
<input type="checkbox"/> Allocated	200013	
<input type="checkbox"/> Assign To Team	200014	
<input type="checkbox"/> Assigned to Team (unscheduled review...)		
<input type="checkbox"/> Awaiting Allocation	200012	
<input type="checkbox"/> Awaiting allocation (unscheduled review...)		

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 'System Users' dialog box with the following elements:

- 1**: Search criteria input field.
- 2**: List of system users including 'My Business Unit Users', 'Active Managers', 'Deactivated Users', 'Lookup View', 'My Business Unit Users', 'My Default Team', and 'My Record'.
- 3**: 'OK' button.

The background interface 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 'Assignment Information' section with the following fields:

- Case Status*: Allocated
- Case Priority: [Empty]
- Responsible User*: Scott Simpson
- Responsible Team*: CareDirectorTest
- Review Date: [Empty]

The toolbar at the top shows the 'Save' button highlighted with a red box and a '1'.

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**.

The screenshot shows the CareDirector interface for a case. The 'Assignment Information' section includes the following fields:

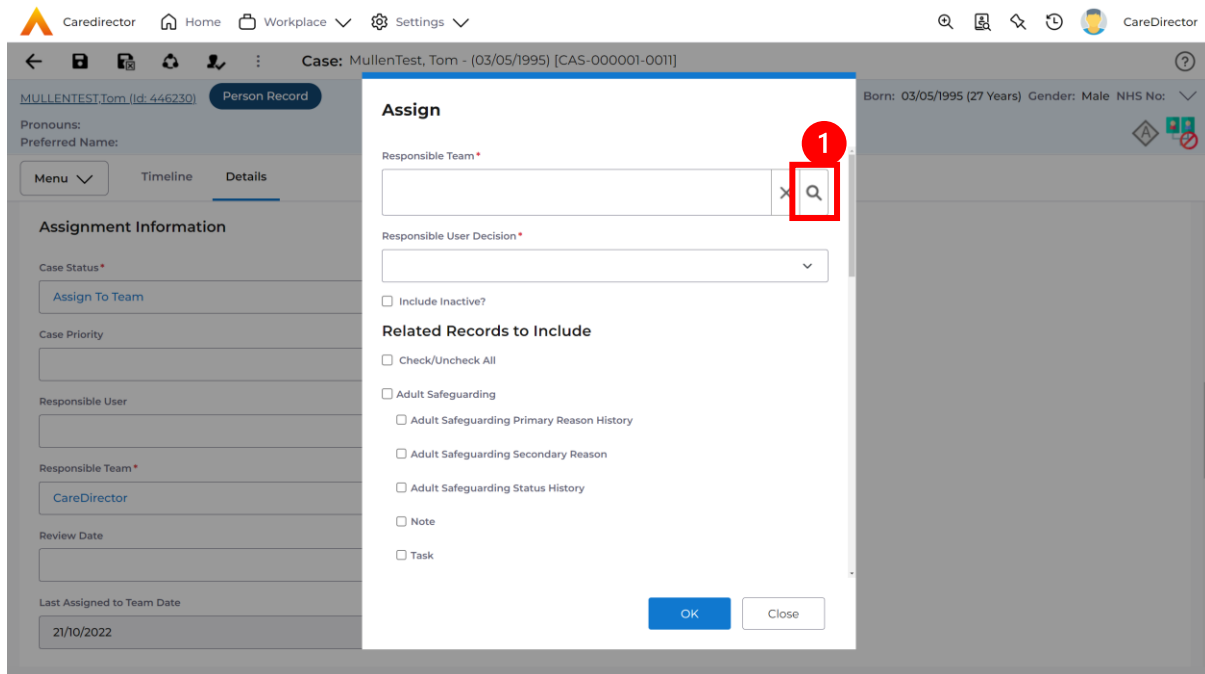
- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A text input field containing 'Scott Simpson'. A red box highlights this field with a '2' in a red circle.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker icon.

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.

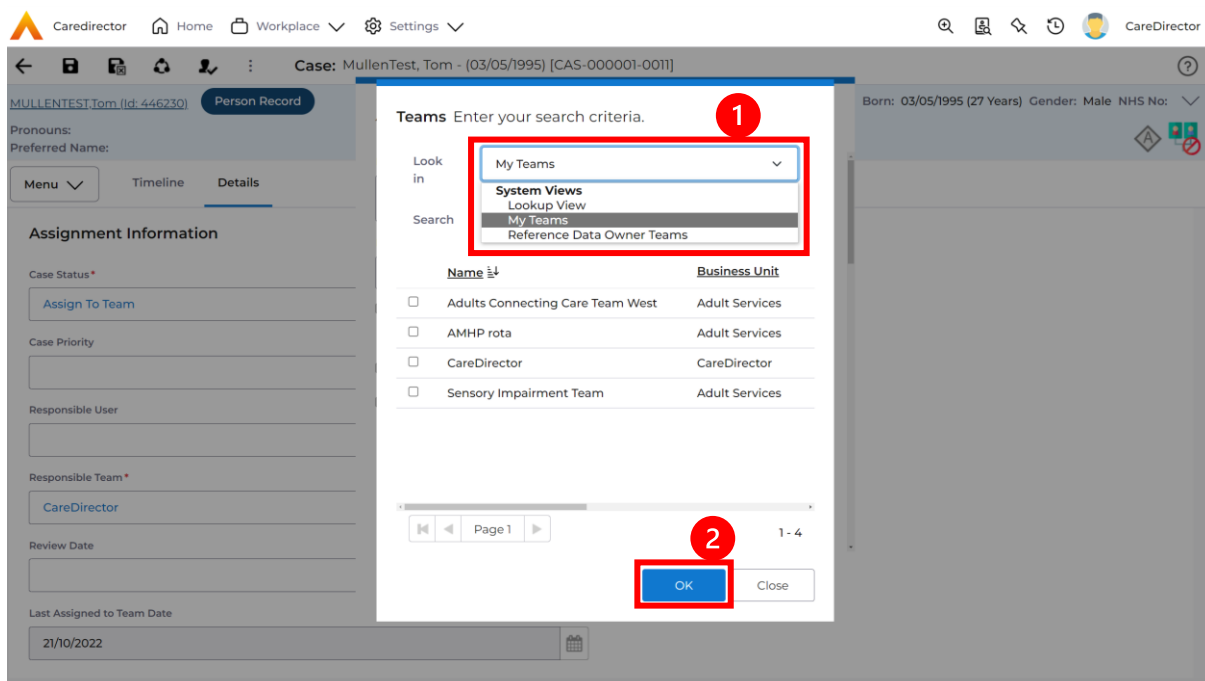
The screenshot shows the CareDirector interface for the same case. The 'Assignment Information' section includes the following fields:

- Case Status ***: A dropdown menu showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: An empty text input field with a search icon. A red box highlights this field with a '2' in a red circle.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker icon.

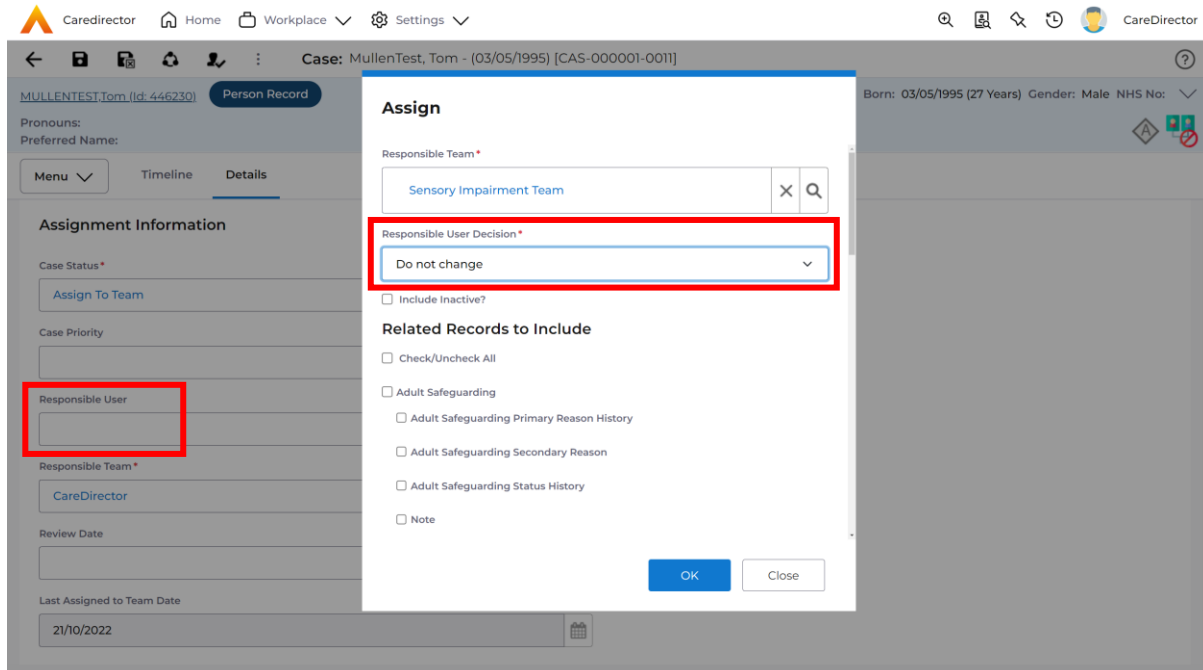
- This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup** function.



- 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**.



- 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**.

The screenshot shows the CareDirector interface for a case. At the top, the breadcrumb navigation shows 'Case: Maisey, Test - (19/11/2000) [CAS-000001-0080]'. Below this, the case details are visible, including 'MAISEY, Test (id: 444301)', 'Deceased', and personal information like 'Born: 19/11/2000', 'Died: 31/08/2022', 'Age at Death: 21 Years', 'Gender: Female', and 'NHS No: 523 669 8081'. The 'Menu' button is circled in red with a '1'. The 'Involvements' icon in the top navigation bar is circled in red with a '3'. The 'Related Items' section is circled in red with a '2'.

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

The screenshot shows the 'Case Involvements' section. The '+' icon in the toolbar is circled in red with a '1'. Below the toolbar, a table lists existing involvement records.

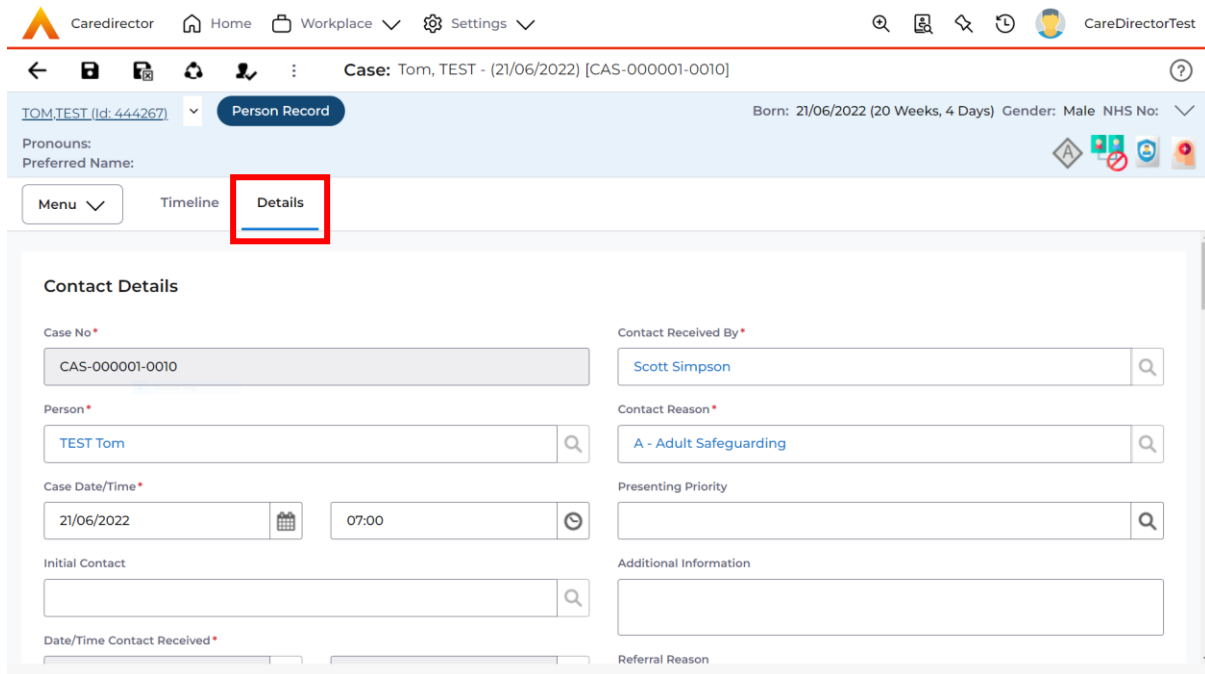
<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...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

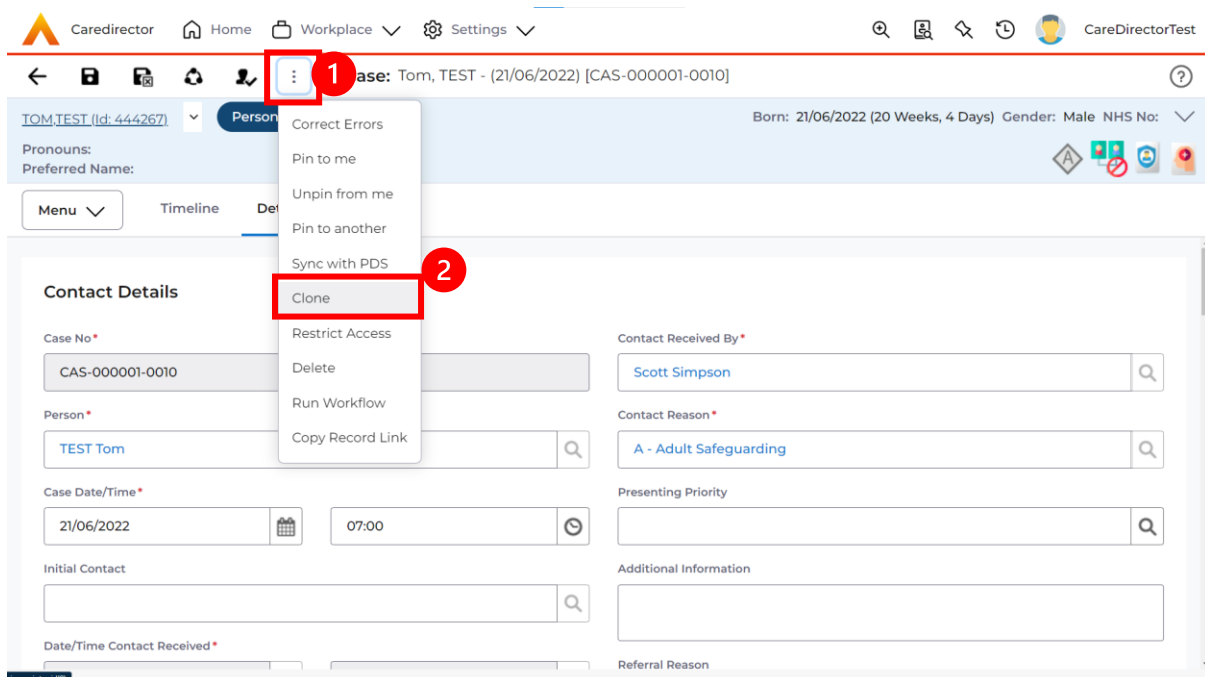
The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a red circle containing the number '1', and the 'Involvement Member' field is highlighted 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' and the 'Involvement Member' field displays 'Peter King'.

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**.



- 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

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

Search

- 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 ^ (1) Timeline Details (2)

- 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

+ (1) 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 CareDirector web interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Case Note (For Case): New' and 'Person Record' for 'TOM.TEST (Id: 444267)'. The 'Details' section contains several form fields: 'Case *' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Responsible Team *' (CareDirectorTest), 'Reason', 'Priority', 'Date *', 'Status *' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'. A red box highlights the 'Responsible User' field, and a red circle with the number '1' is next to it. Another red box highlights the 'Save' icon in the top navigation bar, with a red circle and the number '2' next to it.

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**.

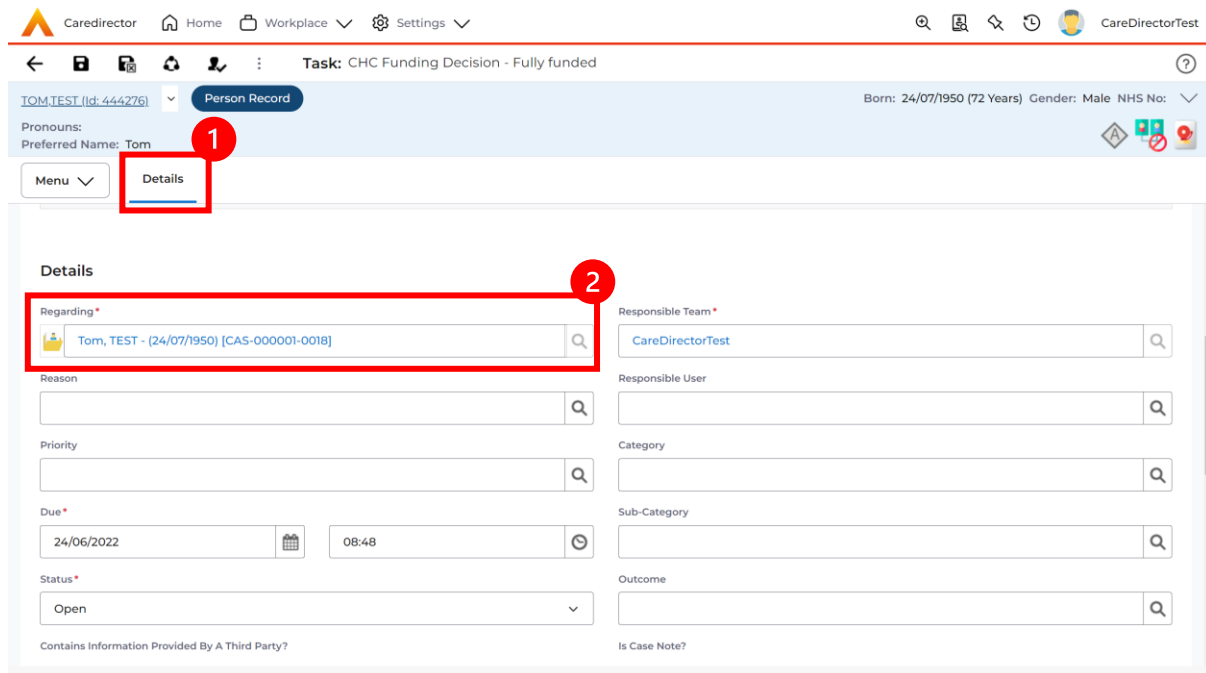
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955) [CAS-000001-000...'. The main content area shows a 'Person Record' for 'MULLENTTEST, Tom (Id: 444264)'. The 'Status' dropdown menu is open, showing options: Complete, Not Started, In Progress, Closed, Cancelled, and Approved. The 'Complete' option is highlighted. A red box highlights the dropdown menu, and a red circle with the number '1' is next to the 'Form Type' field.

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.

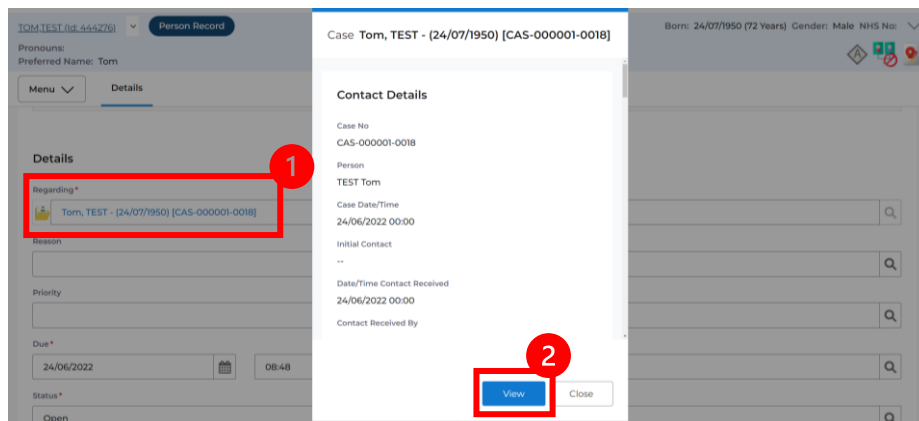
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Task: Test Task for Case'. The main content area shows a 'Task' for 'MULLENTTEST, Tom (Id: 444264)'. The 'Activate' icon in the toolbar is highlighted with a red box and a red circle with the number '2'. A red circle with the number '1' is next to the 'Task' title.

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**.



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**.



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 dialog box open. The dialog box has three red circles: 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 list of teams is as follows:

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 'Task: New' form. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail shows 'MULLENTEST (Id: 446230)' and 'Person Record'. The form fields are as follows:

- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001] (with an 'X' icon)
- Responsible Team***: Sensory Impairment Team (with an 'X' icon)
- Reason**: (empty field)
- Responsible User**: Scott Simpson (with an 'X' icon highlighted by a red box labeled '1')
- Priority**: (empty field)
- Category**: (empty field)
- Due***: (empty field with calendar icon)
- Sub-Category**: (empty field)
- Status***: Open (dropdown menu)
- Outcome**: (empty field)
- Contains Information Provided By A Third Party?**: Yes, No
- Is Case Note?**: Yes, No

How to Allocate an existing Activity to another team

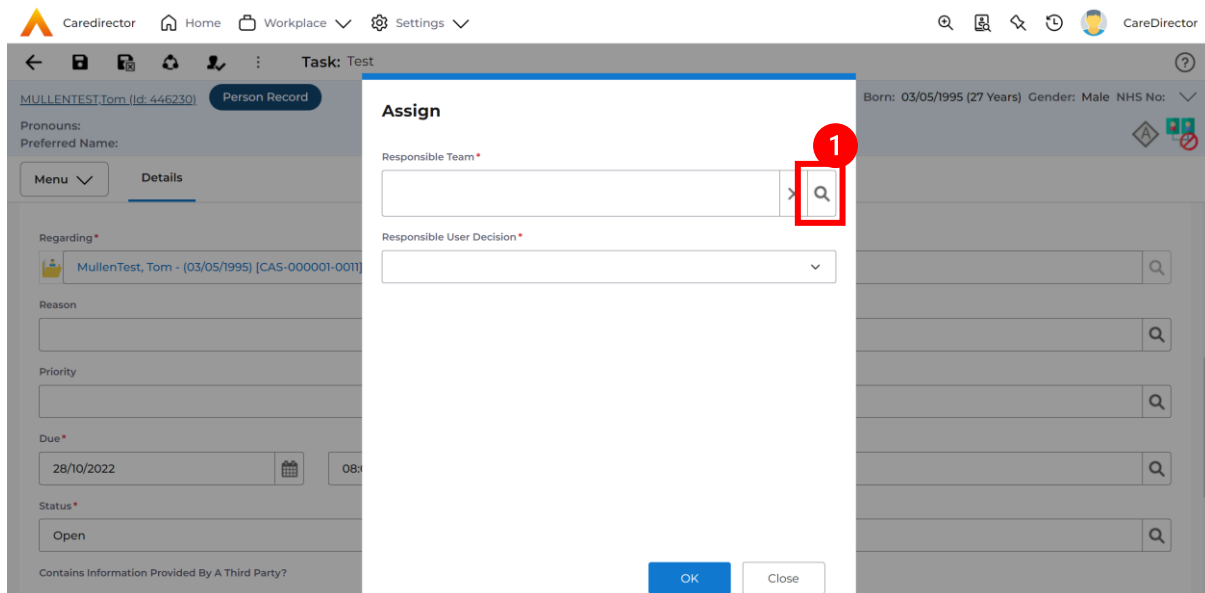
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The 'Responsible User' field is highlighted with a red box and a '1' in a red circle, indicating the 'X' icon used for selection.

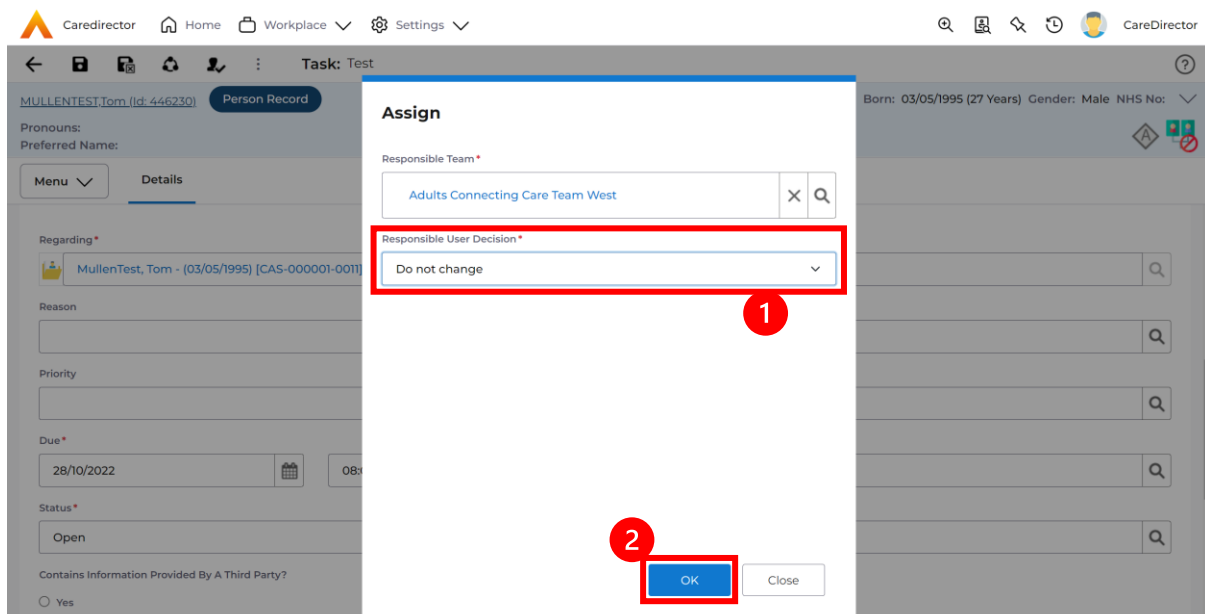
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for the same task record. The 'Assign' icon in the toolbar is highlighted with a red box and a '1' in a red circle.

- 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.



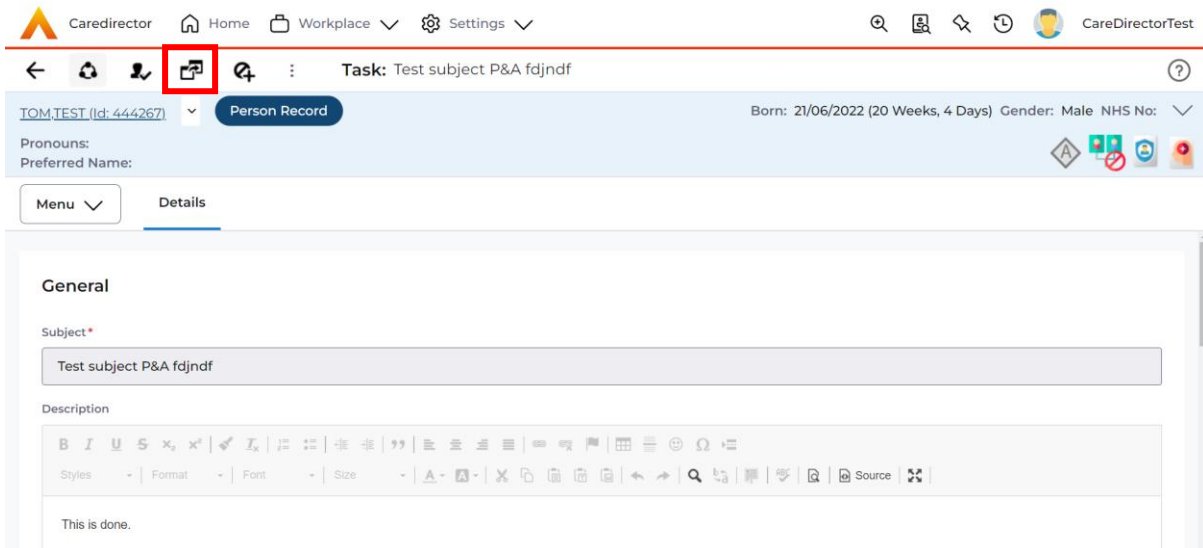
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



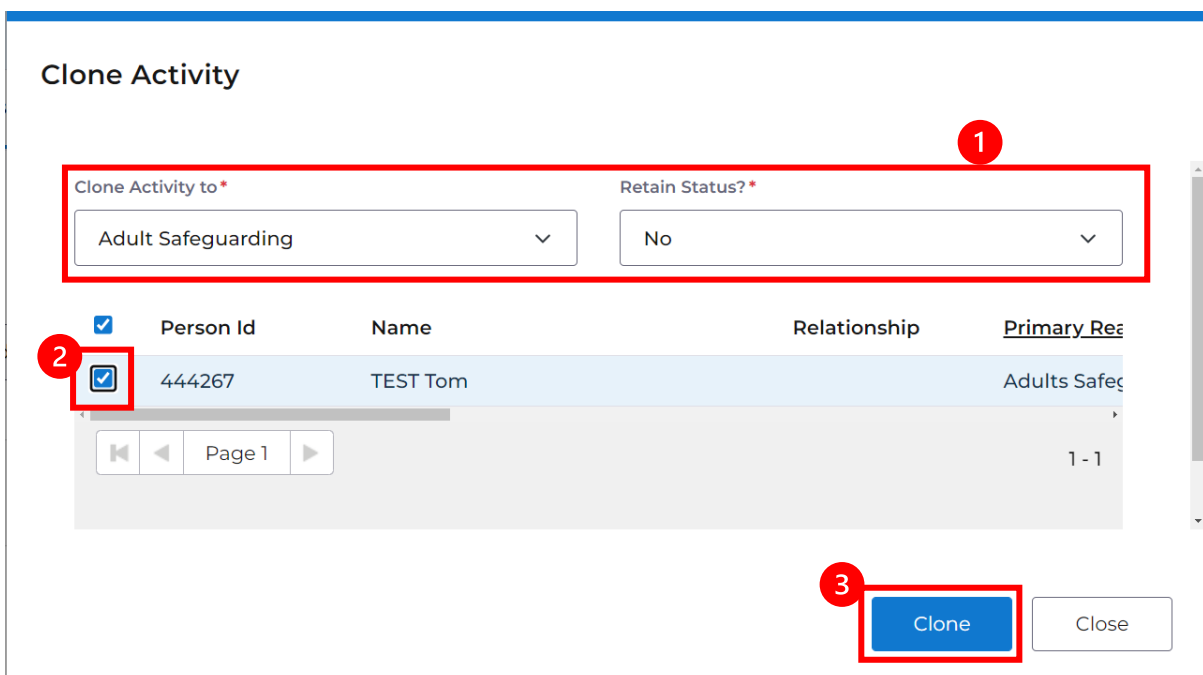
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

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 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. Within '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 | Actions | Adult Safeguarding | Attachments | Audit | Deprivations Of Liberty | **Forms (Case)** | Involvements

Related Items

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

Team

Profession Type

Reset | Refresh | Apply

Form (Case) Created 21/09/2022 13:04:25

A new record of form (case) was created by Scott Simpson.

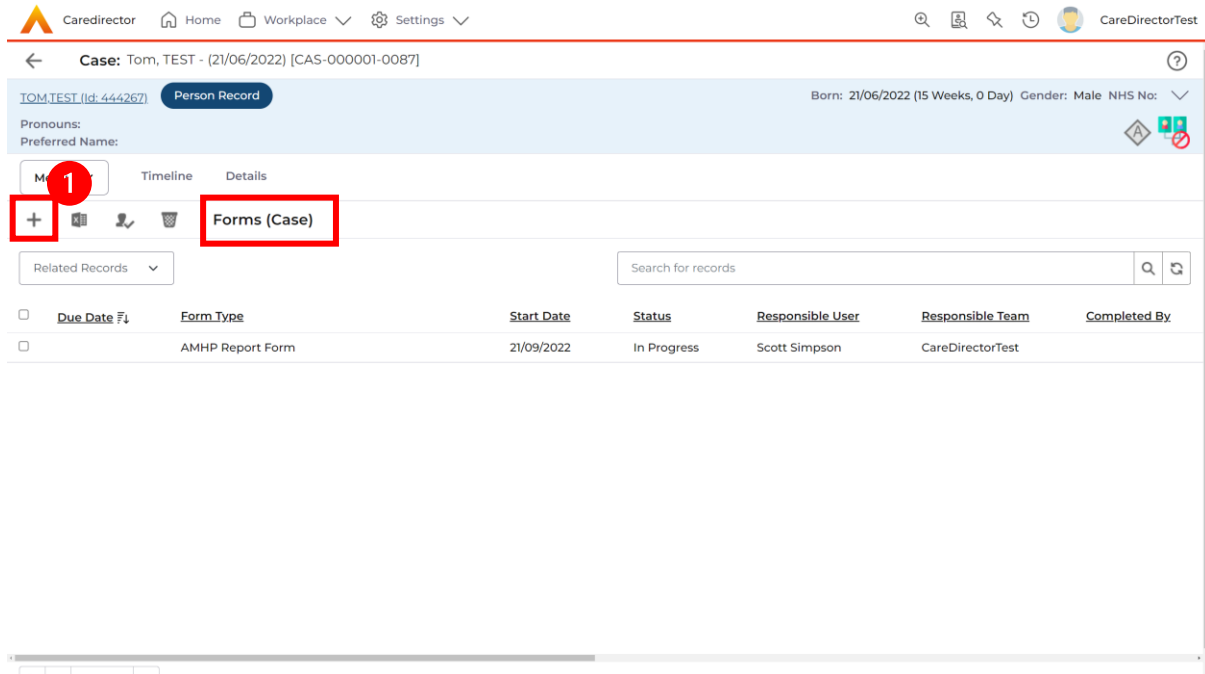
Due Date: [blank] Form Type: AMHP Report Form Status: In Progress

Case Involvement Updated 21/09/2022 12:23:12

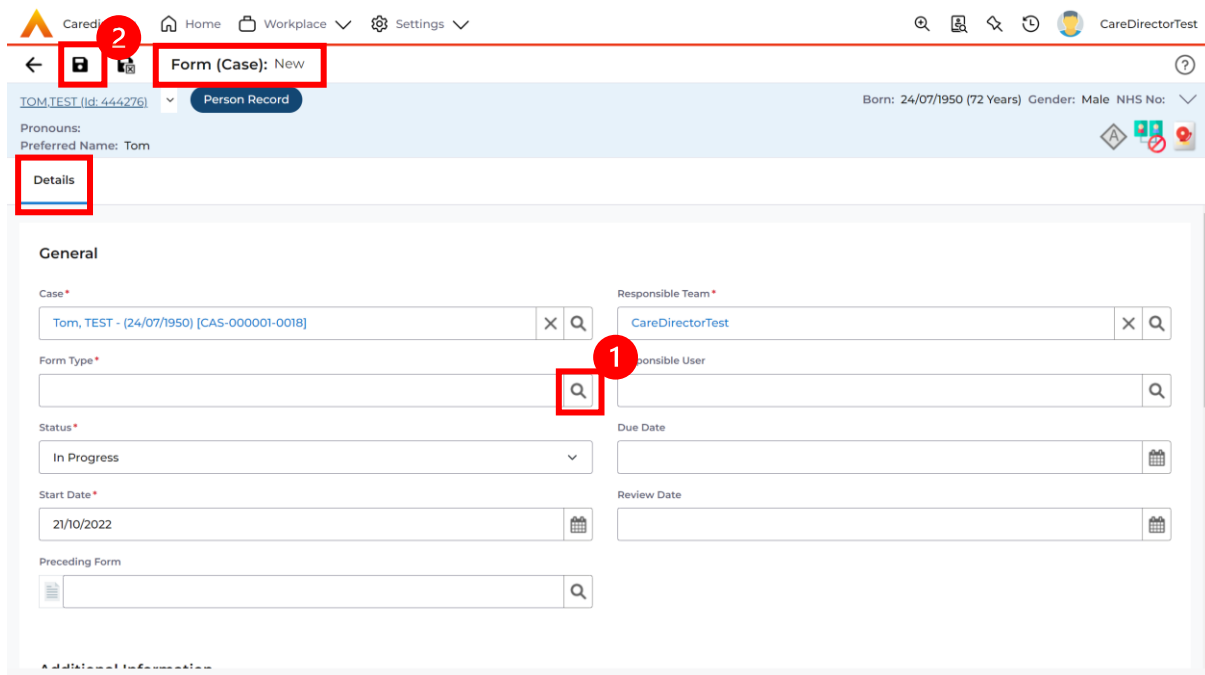
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational Therapist Start Date: 21/09/2022

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.

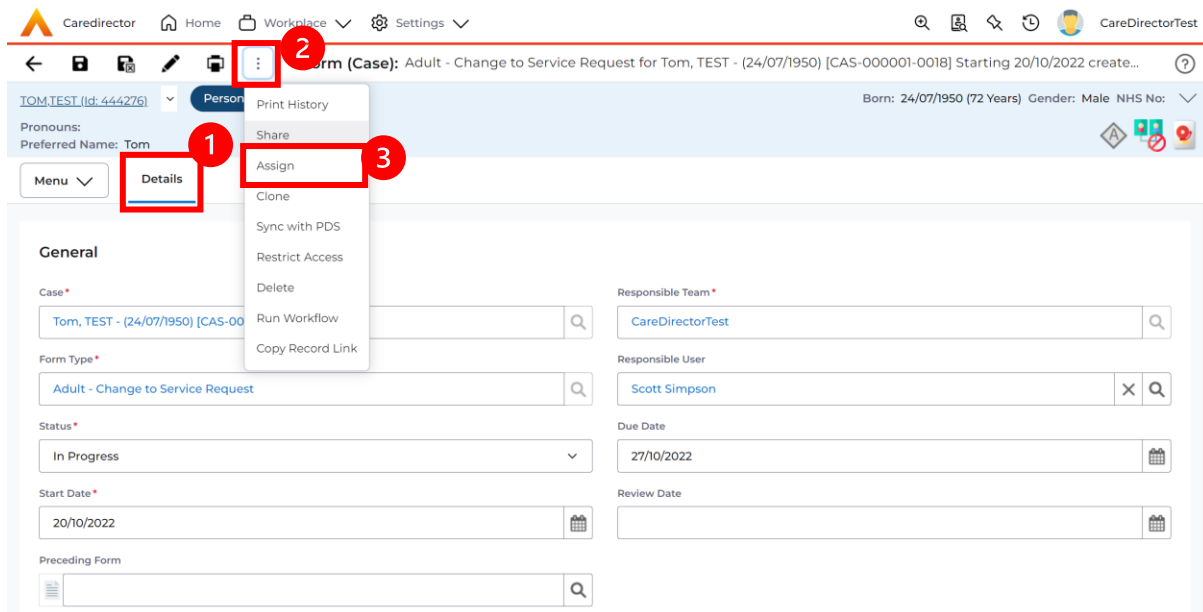
The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The toolbar at the top contains several icons, with the "Edit" icon (a pencil) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022", and gender "Male". The main content area is titled "General" and contains several form 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", and "Review Date".

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

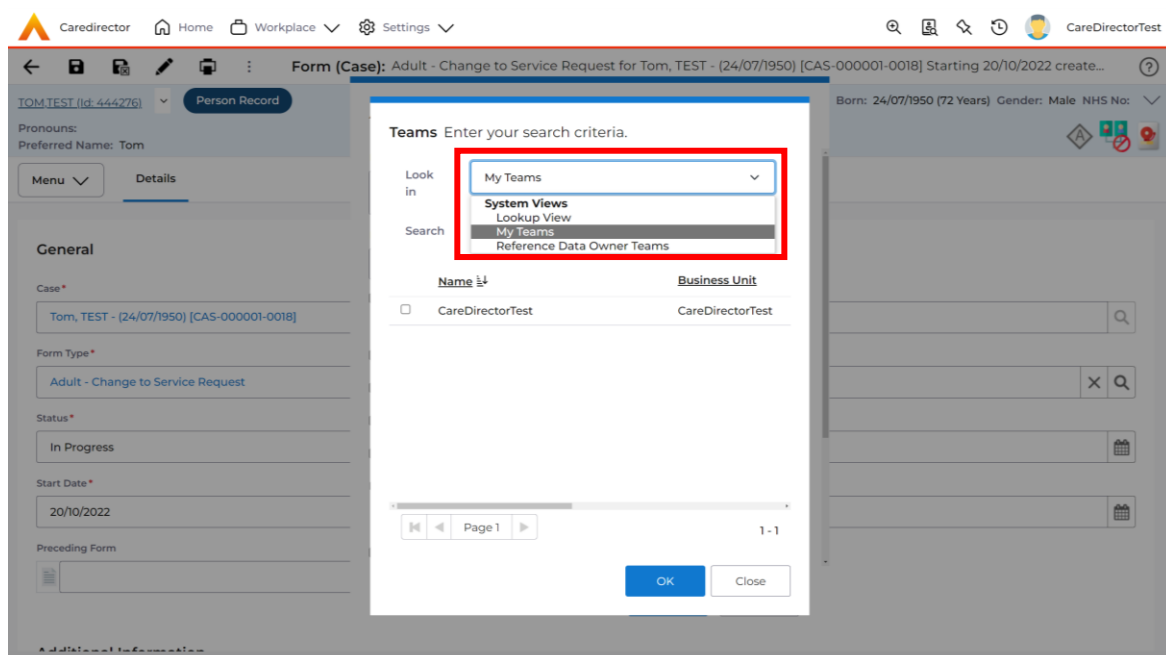
The screenshot shows the CareDirector interface for the "AMHP Report Form". The toolbar at the top contains several icons, with the "Save" icon (a floppy disk) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022", and gender "Male". The main content area is titled "AMHP Report Form" and contains several form sections: "Service User Details", "Referral Details", "Further Details", "Background Information", and "AMHP'S Assessment of th...". The "Client previously known to services?" section has radio buttons for "Yes" and "No". The "Ethnic Origin" section has a list of options with radio buttons: "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", and "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 with 'Clear on current record only' selected.
- Include Inactive?**: An unchecked checkbox.
- Related Records to Include**: A list of checkboxes, with the following items checked:
 - Check/Uncheck All
 - Appointment
 - Assessment Factor
 - Attachment (Case Form)
 - Email
 - Email Attachment
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

The background shows a 'Form (Case): Adult - Change to Service Request for Tom, TEST - (24/07/1950) [CAS-000001-0018]' with various details like 'Case*', 'Form Type*', 'Status*', and 'Start Date*'.

How to Clone a Form

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

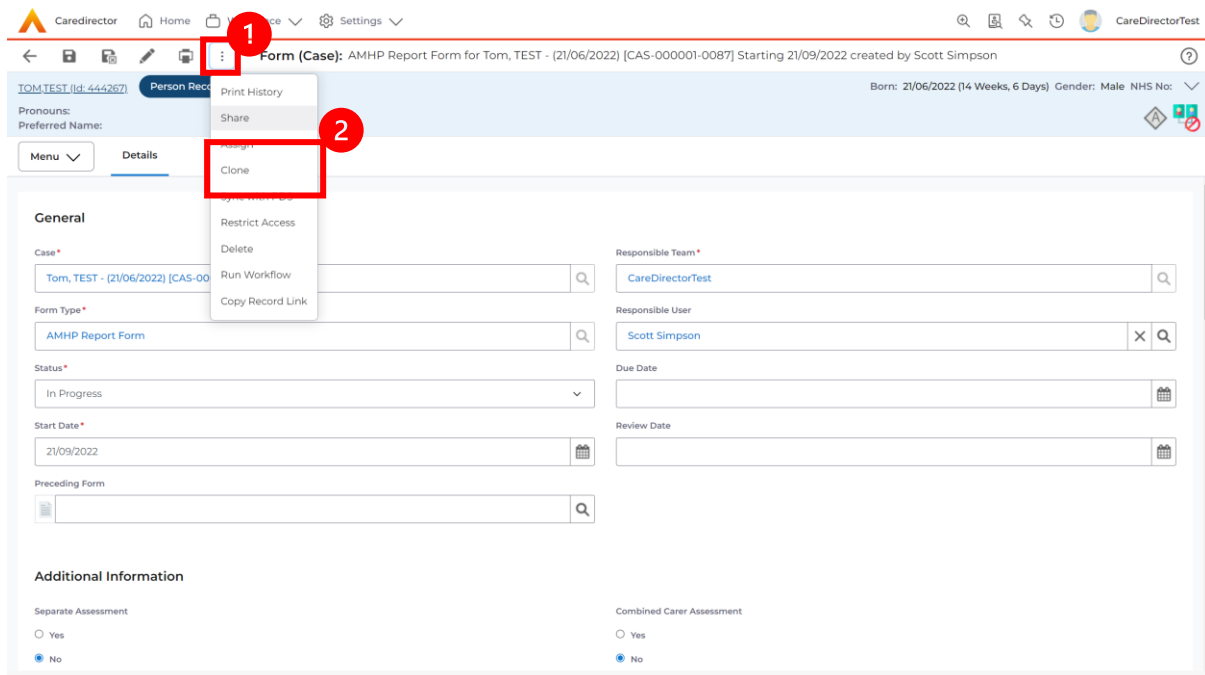
The screenshot shows the CareDirector interface for a case record. The breadcrumb navigation at the top indicates the path: Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]. The main navigation menu is open, and the 'Forms (Case)' option is highlighted with a red box and a red circle containing the number 3. The 'Menu' option is highlighted with a red box and a red circle containing the number 1, and the 'Related Items' option is highlighted with a red box and a red circle containing the number 2. The main content area displays a timeline of events related to the case, including 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

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

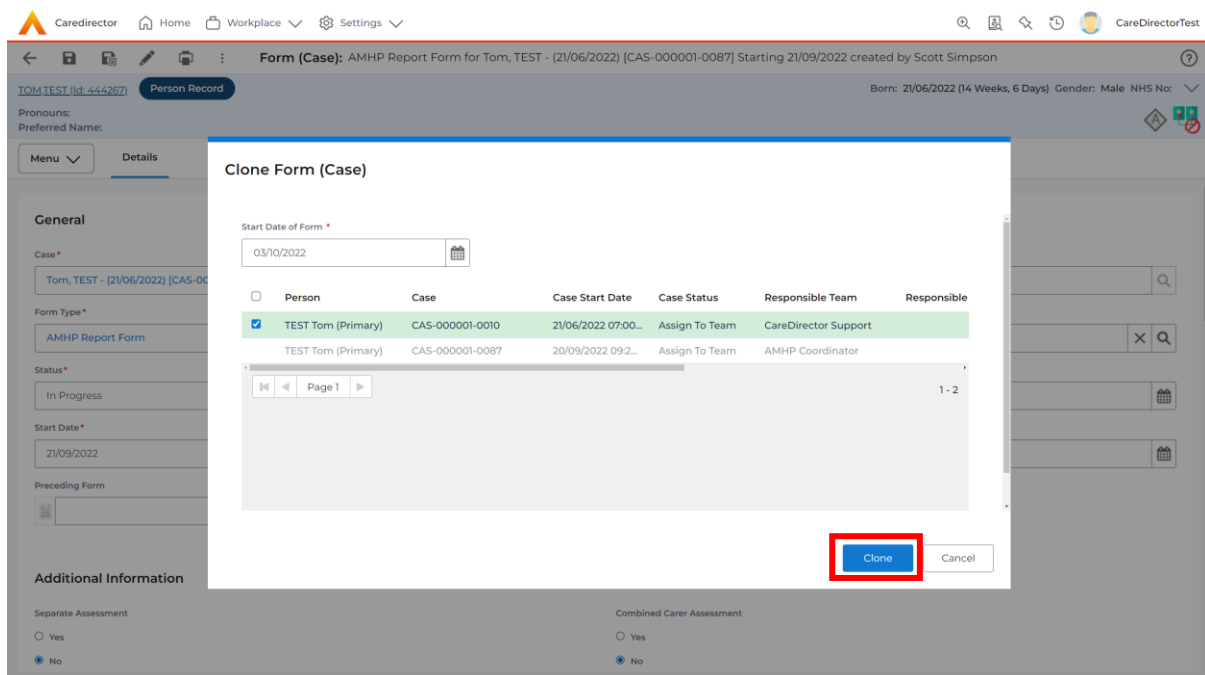
The screenshot shows the CareDirector interface with the 'Forms (Case)' menu item selected. The main content area displays a table of related records. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The table contains one record with the following data:

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'. The main header displays the user 'CD V6 Team' and the current form title: 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. Below the header, there is a 'Person Record' tab and a dropdown menu for 'TOM TEST (id: 444267)'. The user's details are shown: 'Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:'. There are also icons for accessibility and other settings.

The main content area is titled 'Details' and contains two sections: 'General' and 'Completion Details'.

General Section:

- Case*:** Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Form Type*:** Adult Care and Support Plan
- Status*:** Closed
- Start Date*:** 09/11/2022
- Preceding Form:** (Empty search field)
- Responsible Team*:** CareDirectorTest
- Responsible User:** Scott Simpson
- Due Date:** 11/11/2022
- Review Date:** (Empty search field)

Completion Details Section:

- 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 in the top left corner of the form window. 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. The form details are visible below the menu.

How to find an Adult Safeguarding Module

1. Locate the **Case** the **Adult Safeguarding Module** is on. Then select **Menu**, **Related Items** and **Adults Safeguarding**.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0010]'. The user is logged in as 'CD V6 Team'. The interface includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below the navigation bar, the case details are displayed, including 'TOM.TEST (id: 444267)', 'Person Record', 'Born: 21/06/2022 (20 Weeks, 3 Days)', and 'Gender: Male'. The 'Menu' tab is selected, and the 'Related Items' section is expanded. The 'Adult Safeguarding' module is highlighted in red, indicating the next step in the process. Other modules visible include 'Activities', 'Actions', 'Attachments', 'Audit', 'Conferences/Meetings', 'Deprivations Of Liberty', 'Forms (Case)', 'Involvements', 'Other Information', 'Involvements History', 'Joint Case Members', and 'Status History'. A notification at the bottom states 'Form (Case) Updated' and 'Scott Simpson changed Status from 'In Progress' to 'Closed''. The notification includes fields for 'Due Date:', 'Form Type:', and 'Status:'.

2. Select from the list the **Adult Safeguarding Module** you would like to view.

How to create an Adult Safeguarding Module

1. Locate the **Case** the **Adult Safeguarding Module** is on. Then select **Menu**, **Related Items** and **Adults Safeguarding**.

The screenshot shows the Caredirector interface for a case. At the top, there are navigation links for Home, Workplace, and Settings. The case title is "Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]". Below the case title, there is a "Menu" button circled in red with a "1". The "Menu" is open, showing a grid of options. "Related Items" is circled in red with a "2", and "Adult Safeguarding" is circled in red with a "3". Below the menu, there is a notification: "Form (Case) Updated" by Scott Simpson, changing status from 'In Progress' to 'Closed'.

2. From this screen, select **Create New Record** from the toolbar.

The screenshot shows the Caredirector interface for the same case. The toolbar at the top has a "+" icon circled in red with a "1". The "Adult Safeguarding" button is circled in red. Below the toolbar, there is a search bar and a table with columns: Primary Reason, Start Date, End Date, End Reason, Created On, and Created By. The table is empty, showing "NO RECORDS".

3. Fill in the required fields and enter as much information as you know. When finished select **Save**.

Caredirector
 Home
Workplace
Settings

CD V6 Team

←
🔒
📄
Adult Safeguarding: New
?

TOM,TEST (id: 444267)
Person Record

Born: 21/06/2022 (20 Weeks, 3 Days)
Gender: Male
NHS No: ▾

Pronouns:

🏠
🚫
👤

Details

General

Case *

Supported by advocate, family or friend

Responsible Team *

Results of actions taken for risk mgmt.

Responsible User *

Status *

Start Date *

Conclusion

End Date

Deprivation of Liberty

 Yes
 No

Primary Reason *

Discussed with Person

 Yes
 No

End Reason

Person Views

Mental Capacity

Has mental capacity to participate in the process?

Date of assessment

ALLEGATIONS

Making Safeguarding Personal

Asked what their outcomes were?

Desired outcomes achieved?

Safeguarding Adults Review

Safeguarding Review

Serious Harm

How to input Allegations for an Adult Safeguarding Module

1. Locate the **Adult Safeguarding Module** that you would like to input the **Allegation** on. Then select the **Plus** on the **toolbar** of **Allegations**.

The screenshot shows the CareDirector interface for an adult safeguarding case. The breadcrumb trail at the top reads: **Adult Safeguarding: Adult Safeguarding within Case Tom, TEST - (21/06/2022) [CAS-000001-0010] cre...**. The case details include: **Person Record** for **TOM, TEST (id: 444267)**, born 21/06/2022, male, NHS No. [redacted].

The **General** section contains the following fields:

- Case***: Tom, TEST - (21/06/2022) [CAS-000001-0010]
- Responsible Team***: CareDirectorTest
- Responsible User***: Scott Simpson
- Start Date***: 11/11/2022
- End Date**: [empty]
- Primary Reason***: Adults Safeguarding
- End Reason**: [empty]
- Supported by advocate, family or friend**: Yes
- Results of actions taken for risk mgmt.**: No risk identified and action taken
- Status***: Additional Plan
- Conclusion**: No Police Involvement
- Deprivation of Liberty**: Yes (selected)
- Discussed with Person**: Yes (selected)
- Person Views**: [empty text area]

The **Mental Capacity** section contains:

- Has mental capacity to participate in the process?**: Yes
- Date of assessment**: 11/11/2022

The **ALLEGATIONS** section is highlighted with a red box and a red circle containing the number '1'. It features a toolbar with a plus sign (+) and a trash icon. Below the toolbar is a table with the following columns: **Allegation Date**, **Alleged Victim**, **Alleged Abuser**, **Primary Category of Abuse**, and **Police have been Notified?**. The table is currently empty, displaying a message: **NO RECORDS** (No results were found for this screen.).

2. Enter in the details and when finished select **Save**.

Caredirector Home Workplace Settings CD V6 Team

Allegation: New

Details

General

Alleged Victim *
TEST Tom

Alleged Abuser *
[Empty]

Allegation Details

Allegation Date *
[Empty]

Part of a Larger Investigation
 Yes
 No

Association *
Community Health Care - Known to Individual

Responsible Team *
CareDirectorTest

Associated Provider
[Empty]

Abuse Details

Primary Category of Abuse *
Financial Abuse

Abuse Date From
[Empty]

Primary Place of Alleged Abuse *
Hospital

Abuse Date To
[Empty]

Secondary Categories of Abuse
[Empty]

Normal Place of Residence *
Hospital

Other Place of Alleged Abuse
[Empty]

Abuse Details
[Empty]

Allegation Outcome

Related Safeguarding Record
Adult Safeguarding within Case Tom, TEST - (21/06/2022) [CAS-0000...]

Outcome Details
[Empty]

Outcome
[Empty]

POLICE DETAILS

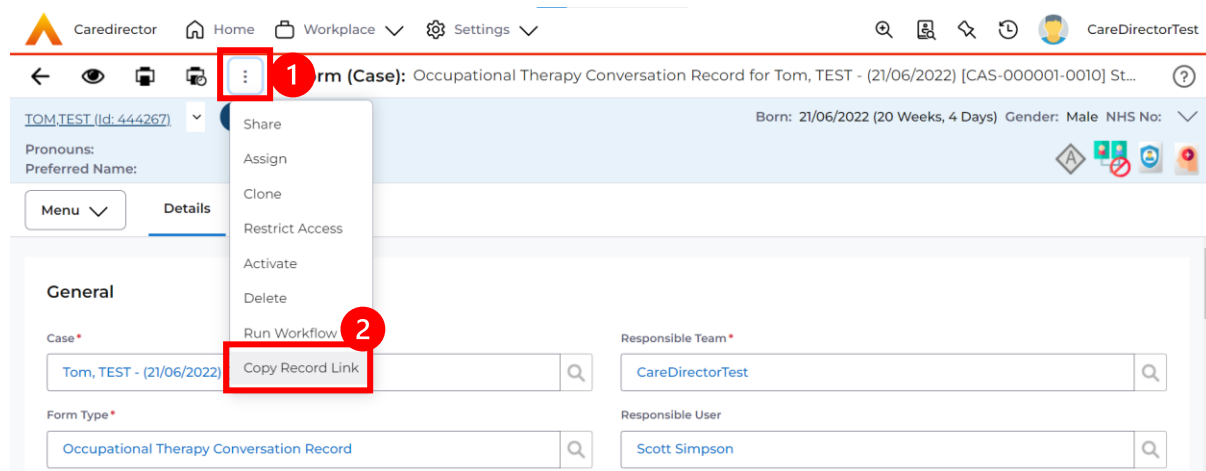
Decision to Notify Police

Should the Police be Notified?
 Yes
 No

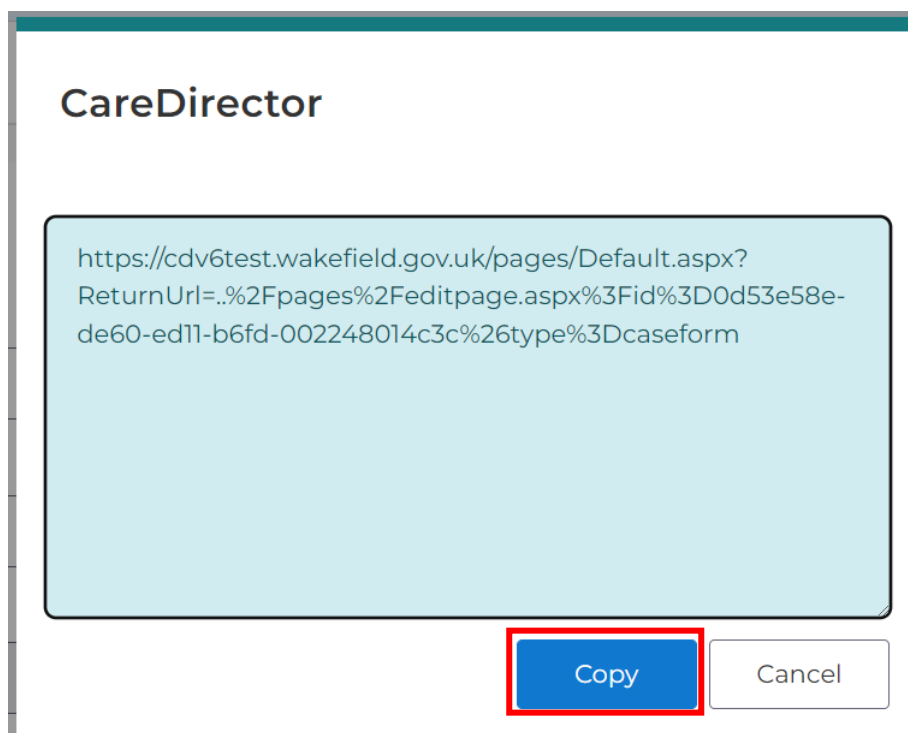
Reason for Decision
[Empty]

How to Copy Record Link

1. Locate the **Record** you want to copy. This **URL** will allow anyone you send it to, to get instant access (after they log in with their own username and password).
2. This example is a **Form** but this works the same way on every **Record**. Select the **Three Dots** and then **Copy Record Link**.



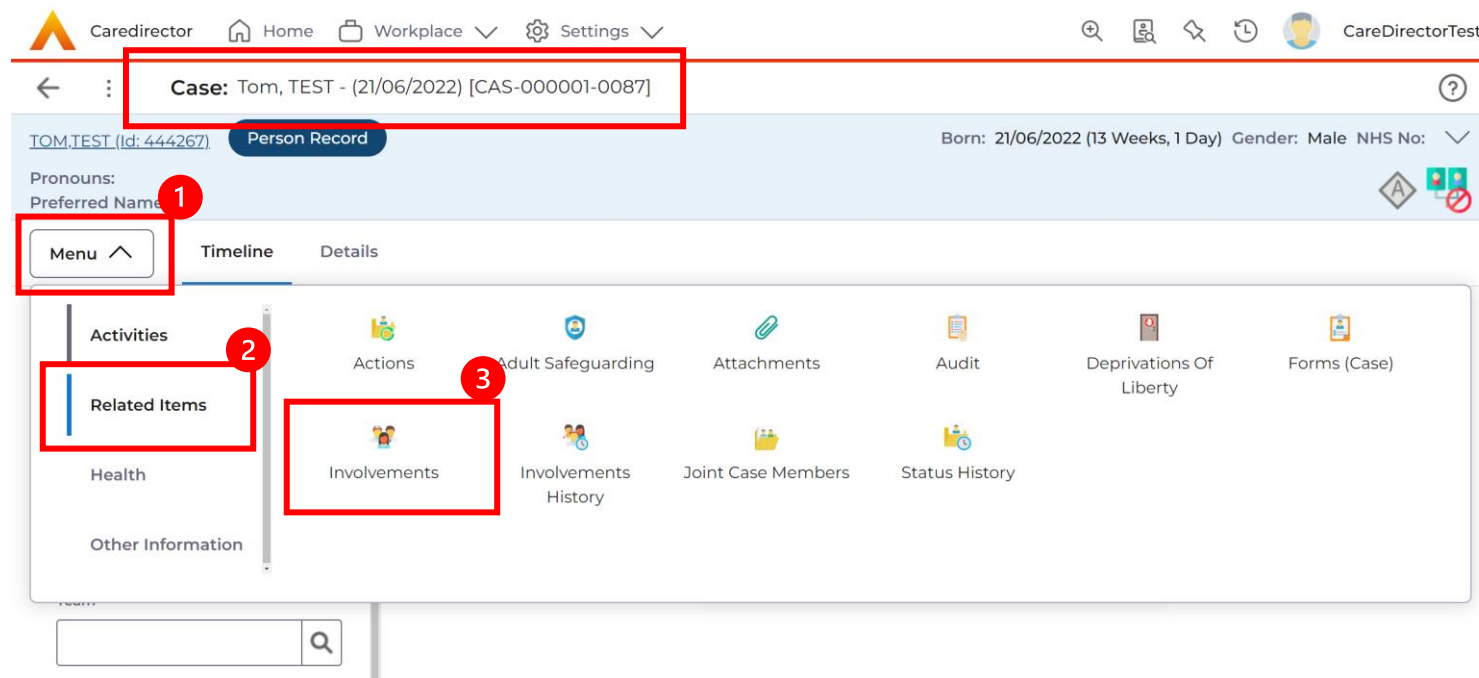
3. This will open the **Copy Record Link** window, select **Copy** and then **Paste** it onto the email/ MS Teams etc.



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"/>	<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

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 Status	
End Date	21/09/2022
Involvement End Reason	
Involvement 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 '1' in a red circle. The 'Activities' button is highlighted with a red box and a '2' in a red circle. 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 '3' in a red circle. 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: [dropdown]

Pronouns: Preferred Name: [dropdown]

Menu Timeline Details

Tasks

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

<input type="checkbox"/>	<u>Subject</u>	<u>Due</u> [dropdown]	<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 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main toolbar contains icons for back, save, print, refresh, and a three-dot menu. The three-dot menu is open, showing 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 show 'TOM.TEST (Id: 44426)', 'Person Recd', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Subject' field contains 'Referral has been Allocated'. Below the subject field is a rich text editor with a toolbar and a large text area. The status bar at the bottom right indicates '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 the CareDirector logo, Home, Workplace, and Settings menus. The user is logged in as CareDirectorTest. Below the navigation bar, a breadcrumb trail shows the current case: "Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]". The main content area is divided into tabs: Menu, Timeline, and Details. The Details tab is selected and highlighted with a red box and a red circle containing the number 1. Below the tabs, the "Assignment Information" section is visible. This section contains several input fields: Case Status* (with "Assign To Team" selected and highlighted by a red box and a red circle containing the number 2), Case Priority, Responsible User, Responsible Team* (with "AMHP Coordinator" selected), 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 * **2**

Case Priority

Responsible User

Responsible Team *

Review Date

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

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main content area displays a case record for '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 at the bottom of the modal 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 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 user is identified as 'CareDirectorTest'. The case details include 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Assignment Information' section is highlighted with a red box and contains the following fields:

- Case Status***: Closed
- Case Priority**: (empty)
- Responsible User**: (empty)
- Responsible Team***: AMHP Coordinator
- Review Date**: (empty)
- Last Assigned to Team Date**: 20/09/2022
- Close Date***: 03/10/2022 13:43
- Closure Reason***: All Work Completed
- Closure Accepted By***: Scott Simpson
- Archive Date***: 28/10/2022

The 'Other Information' section at the bottom includes '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**.

Closure Requested (Safeguarding)

Practitioner

1. When closing a case, practitioners handling safeguarding cases should follow the steps outlined in the "[How to Close a Case section](#)" section. However, instead of selecting the regular closure status, they should choose "Closure Requested" under Case Status. This action will prompt the case to be transferred to their manager, who will then be responsible for either closing the case or rejecting the closure request.

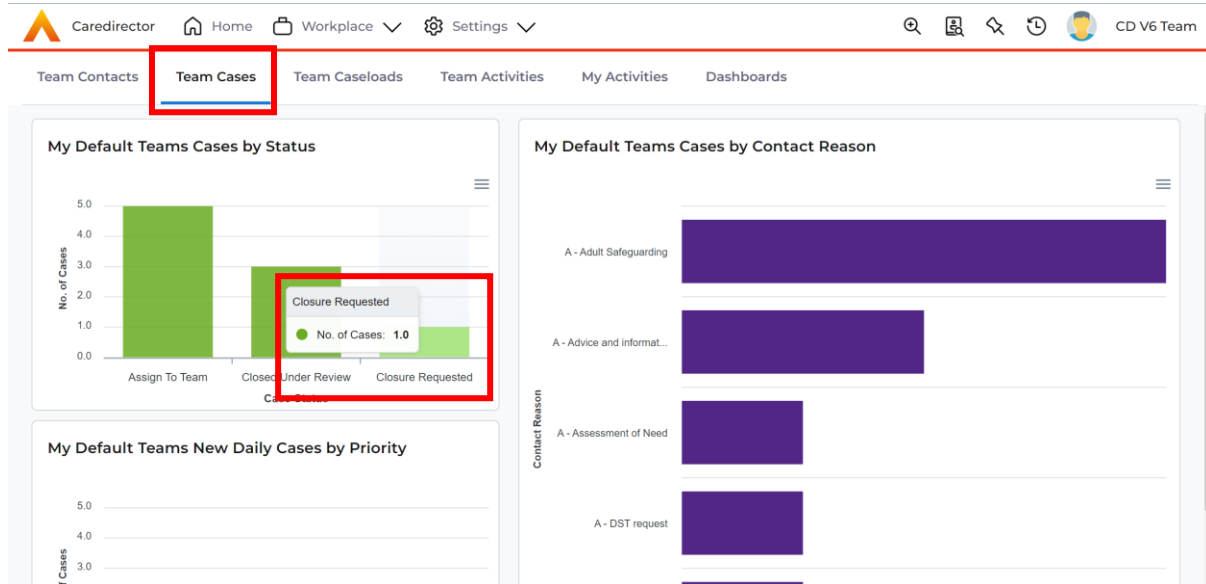
2. New fields will appear, asking "Closure Reason" "Closure Accepted By"

<u>Field</u>	<u>Information</u>
Closure Reason	Choose appropriately
Closure Accepted By	Yourself
Archive Date	10 years beyond the closure date for Adult Protection Cases 3 years if there was a service provided 2 years if there was no service provided

3. Once created, select "Save" this will then send the case to your managers dashboard for them to accept or reject.

Managers

1. When closing a safeguarding case, it will require manager's oversight. The closure request will be sent through to your "My Cases" dashboard. Here you can accept or reject the closure.

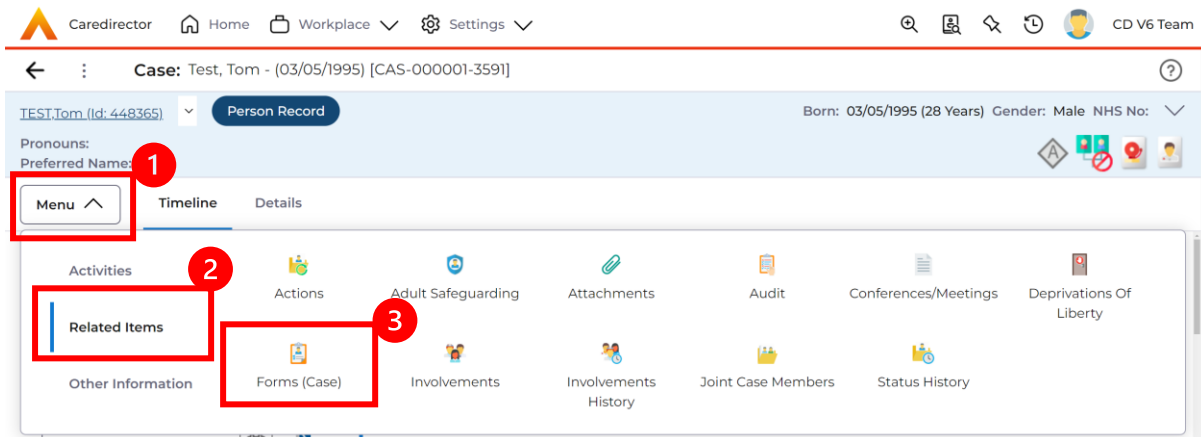


2. Here you will select the column "Closure Requested" and this will turn into a grid view. Select the relevant one from the rows.

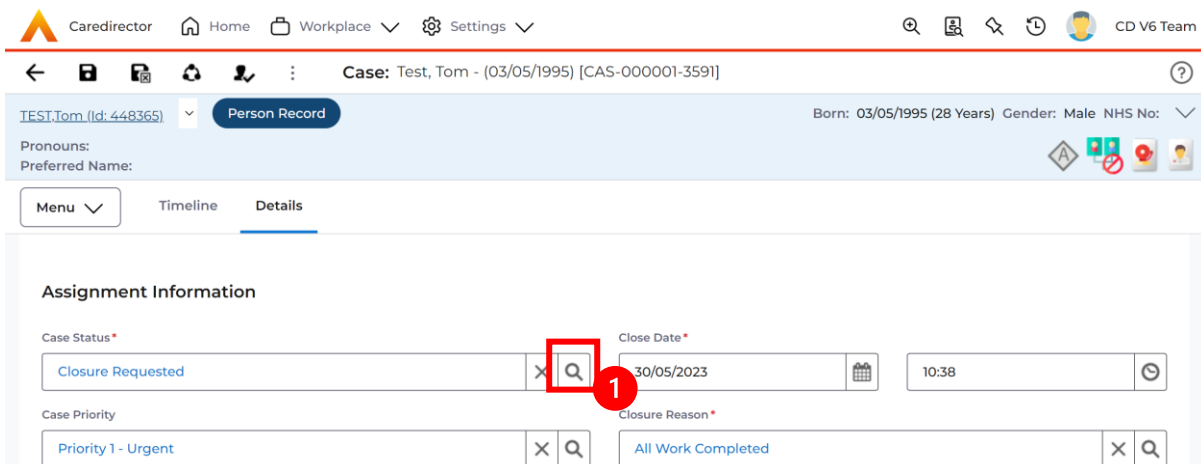
Responsible Tea...	Presenting Prior...	Case Priority	Contact Reason	Case Status	Person	Post Code	Case Date/Time	La...
CD V6 Team		Priority 1 - Urgent	A - Adult Safegu...	Closure Request...	Tom Test		30/05/2023 09:0...	

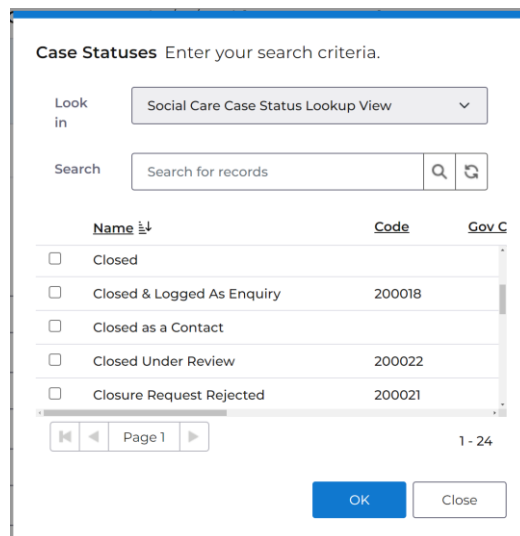
3. Once selected, it will divert you to the case record. Here you can check the safeguarding module via:
Menu > Related Items > Adult Safeguarding

- Alternatively, you can find the “Forms (Case)” via:
Menu > Related Items > Forms (Case)
Select from the list and then the pencil or eye view to view the form once inside a form has been selected.

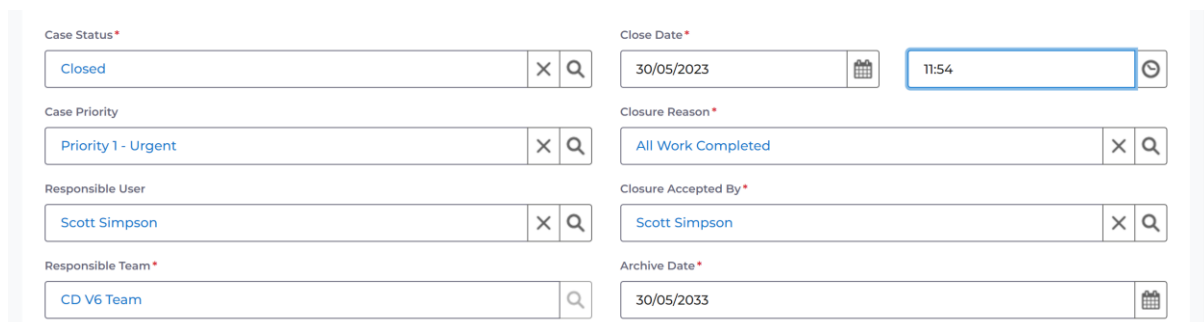


- Once you are happy with the information, go onto details and you can either accept or reject the closure. Under “Case Status” select the “lookup function” and choose “Closed” – if accepted/ or “Closure Requested Rejected” – if rejected.

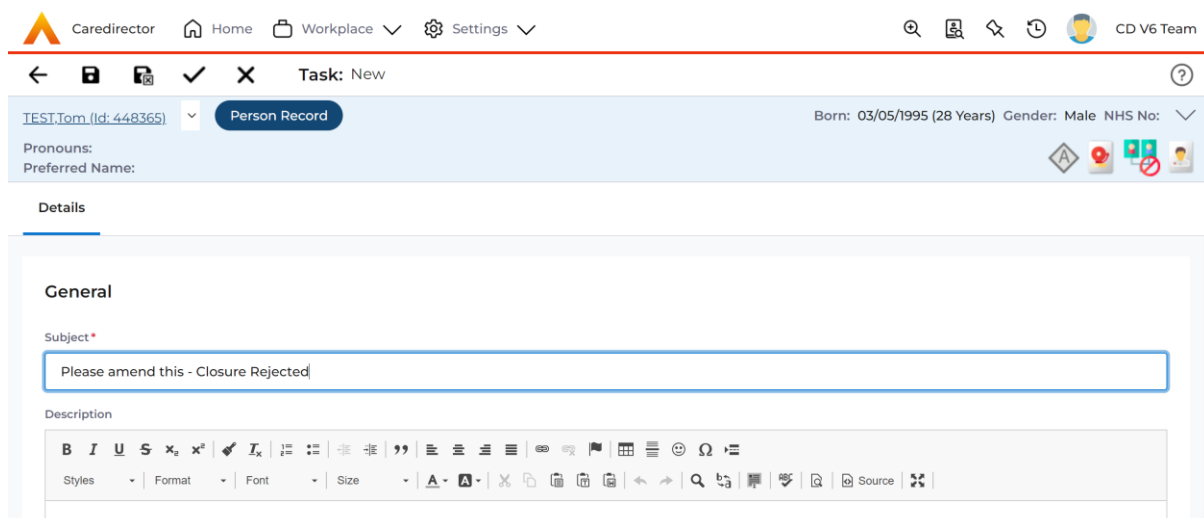




6. If “Closed” was selected, please amend the closure date, closure accepted by to your name if chosen or leave as practitioner. Then “Save”, this will now remove itself from your dashboard.

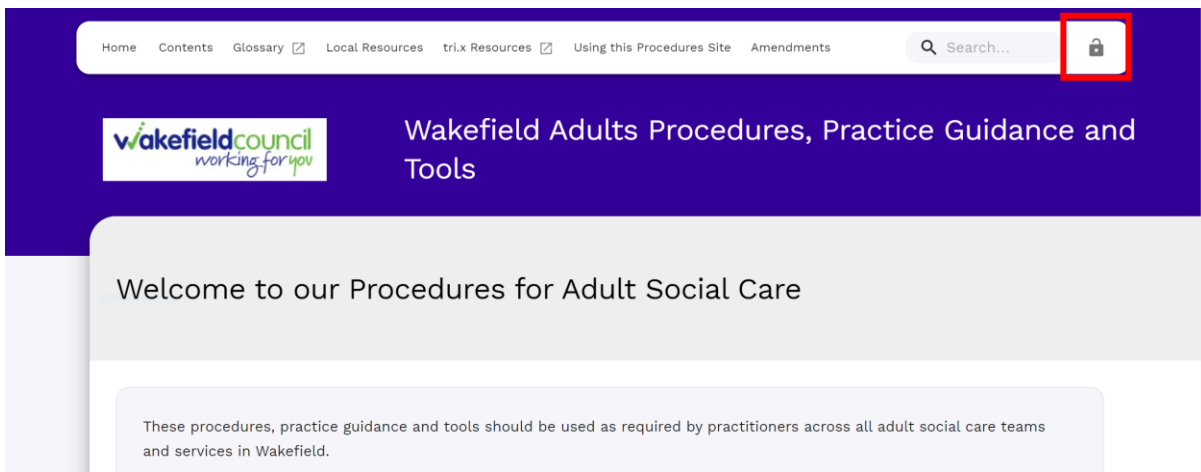


7. If “Closure Request Rejected” occurred, this will remove the additional fields on the right and will send back to the allocated worker when saved. If required, please fill out an “Task” activity to explain why this was rejected and allocated to the responsible user of the case.

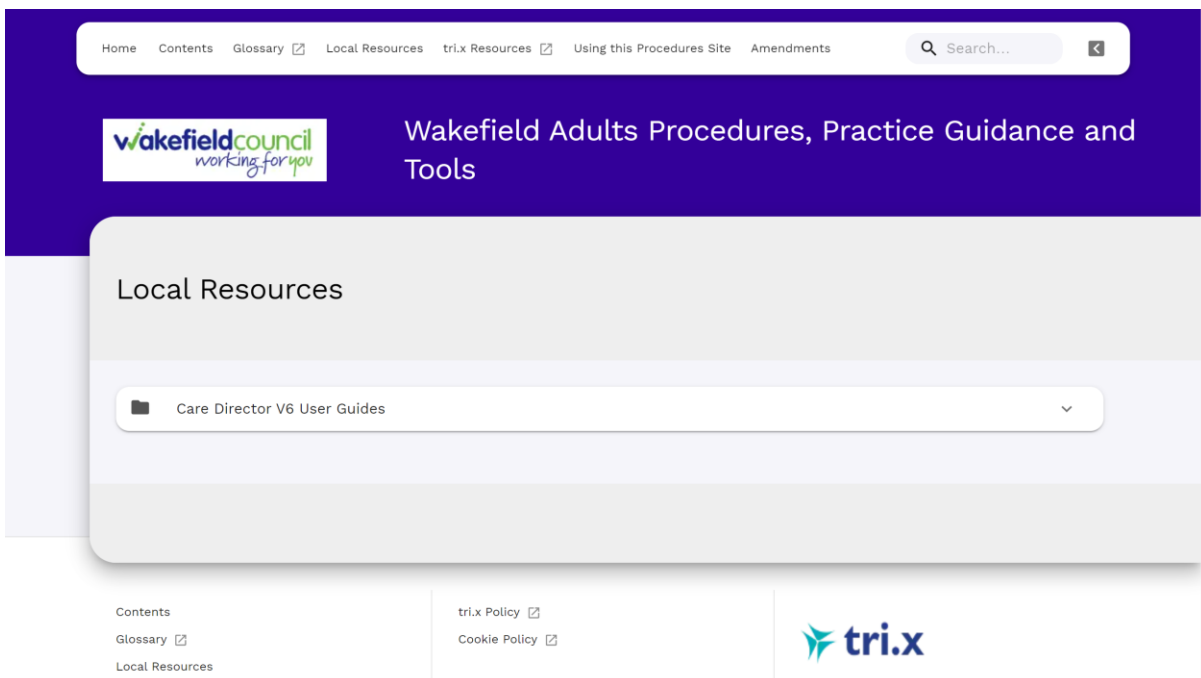


Further CareDirector Guidance

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	Change	Author	By Date
V1	INITIAL START	SS	14/10/2022
V2	Closure Requested (Safeguarding) This was included due to safeguarding cases now requiring oversight by managers before closure. <ul style="list-style-type: none">- Practitioner instructions- Managers instructions	SS	30/05/2023