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
Last Updated	30/05/2023

Contents

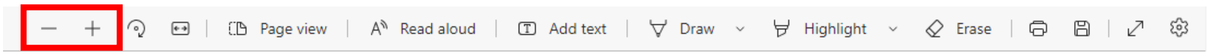
Guide Information

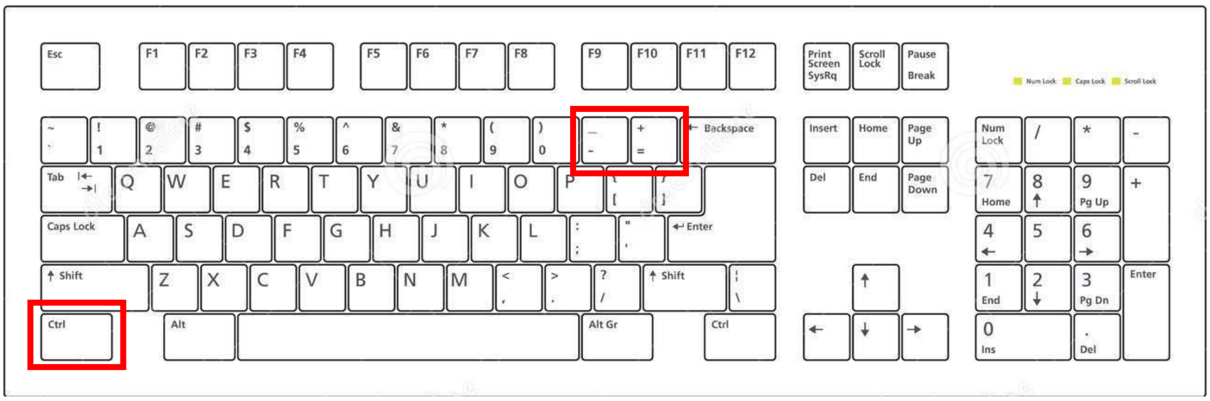
Before Live Access…

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.

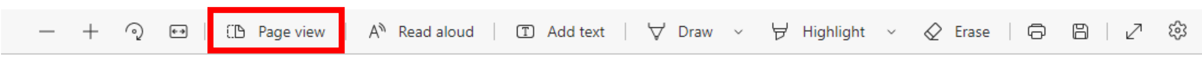
Guide Navigation

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.

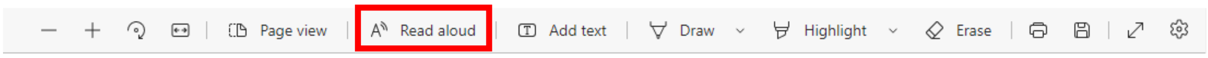




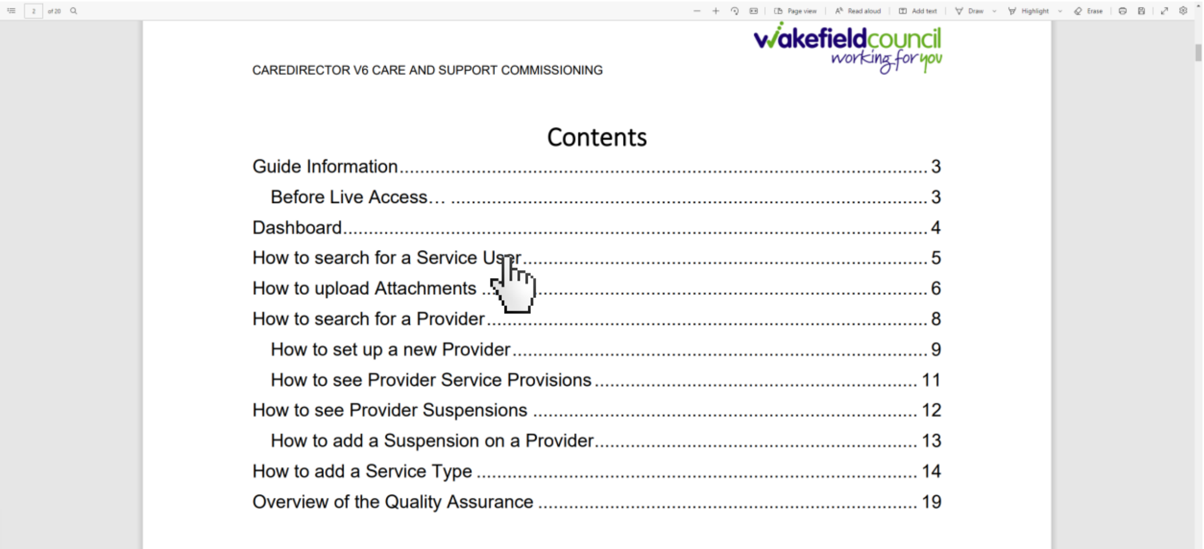
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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.



CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

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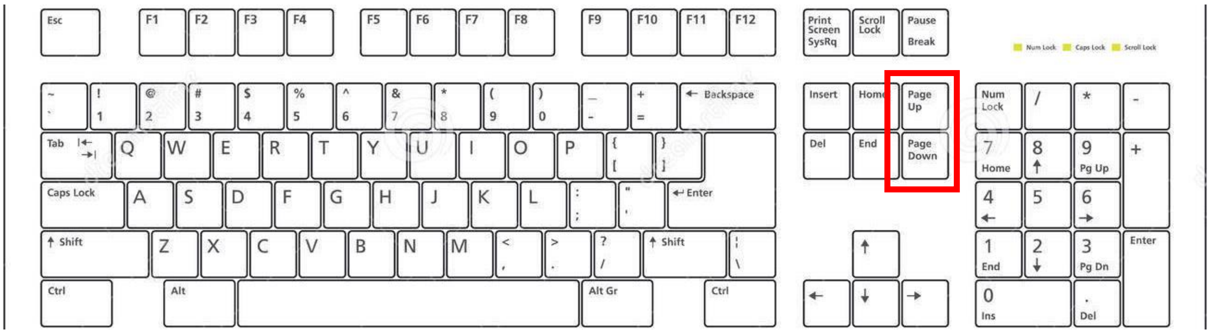
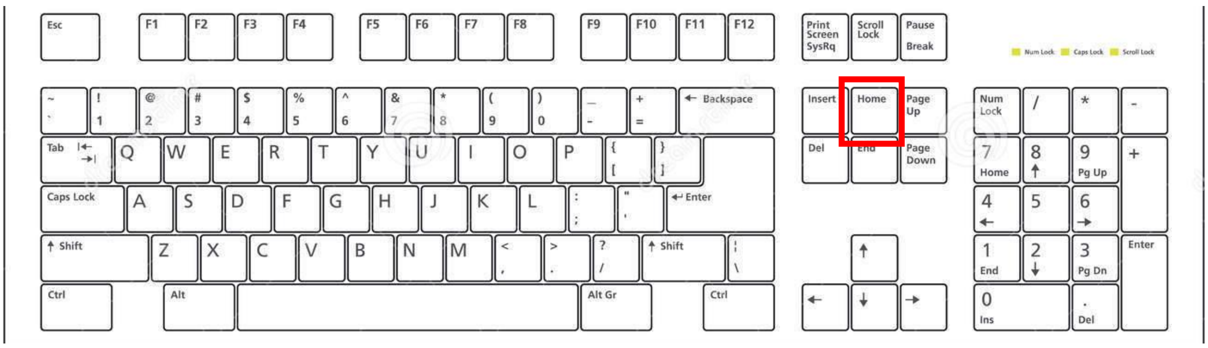
6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to “jump” up and down a page.

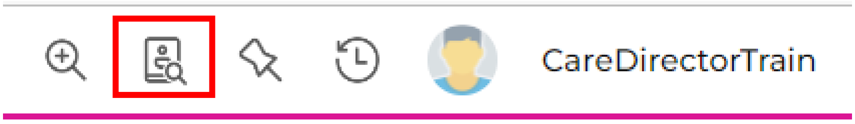


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.

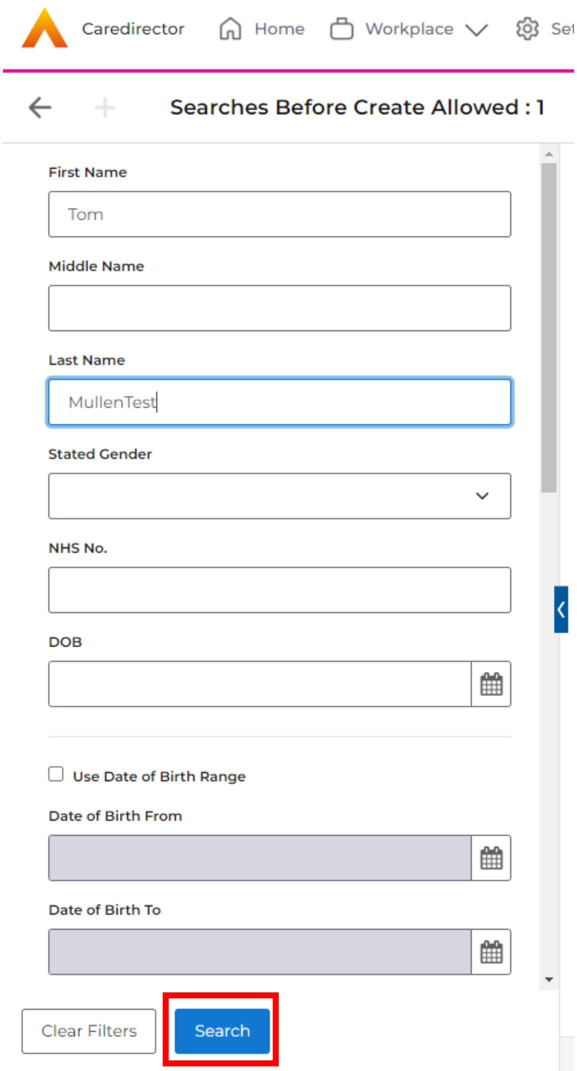


How to search for a Service User

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



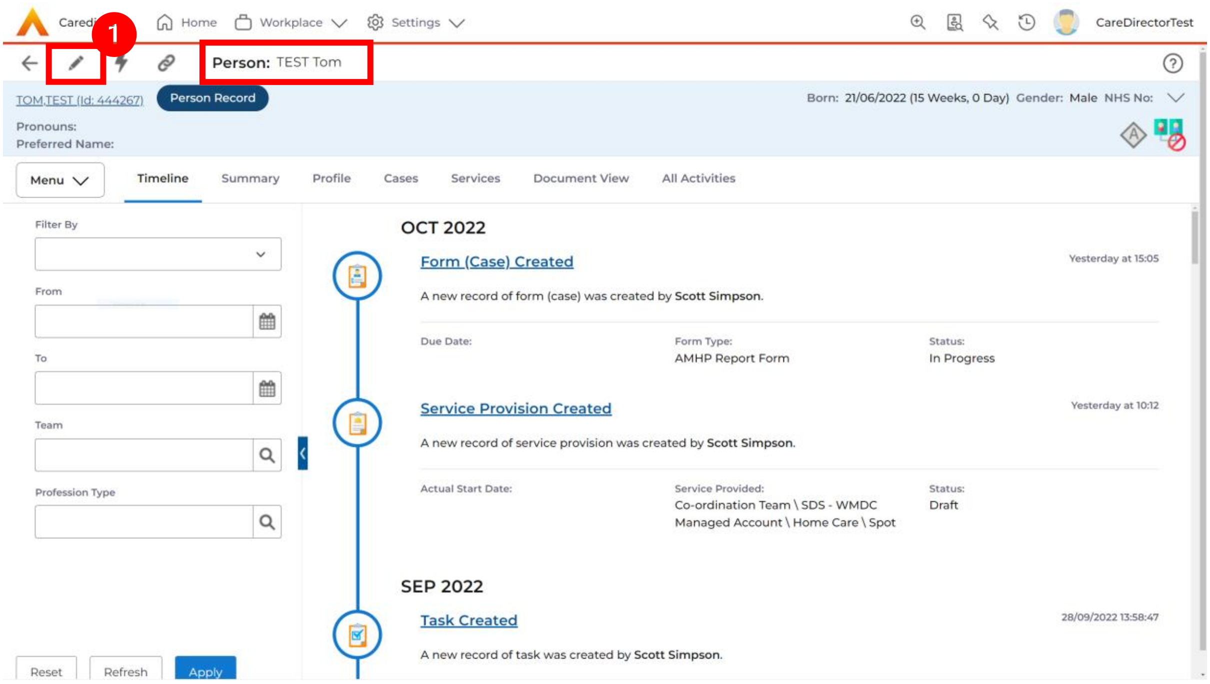
2. Enter their details provided. When finished, select **Search**.



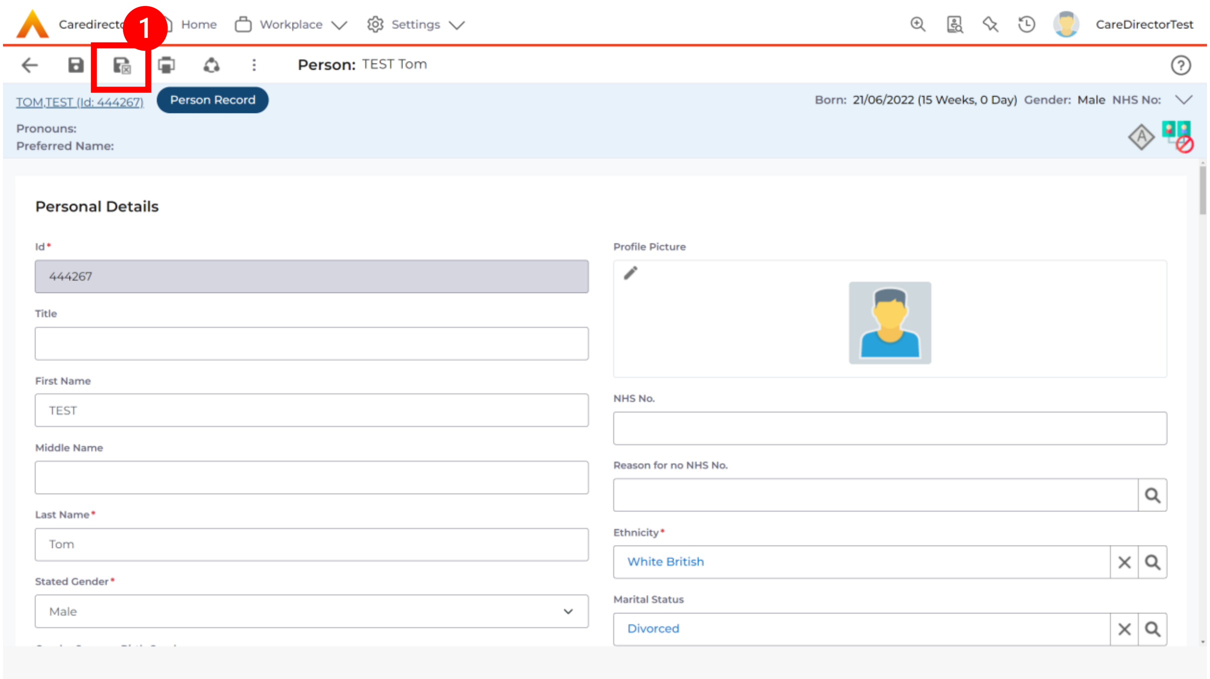
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

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

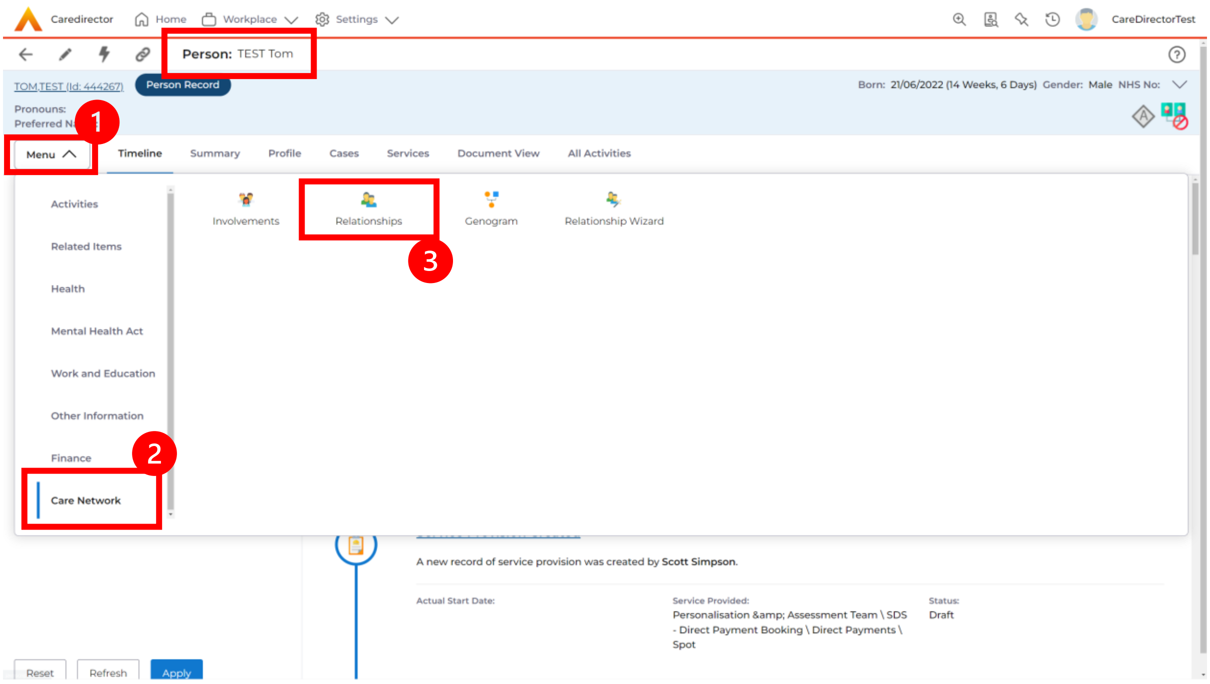


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

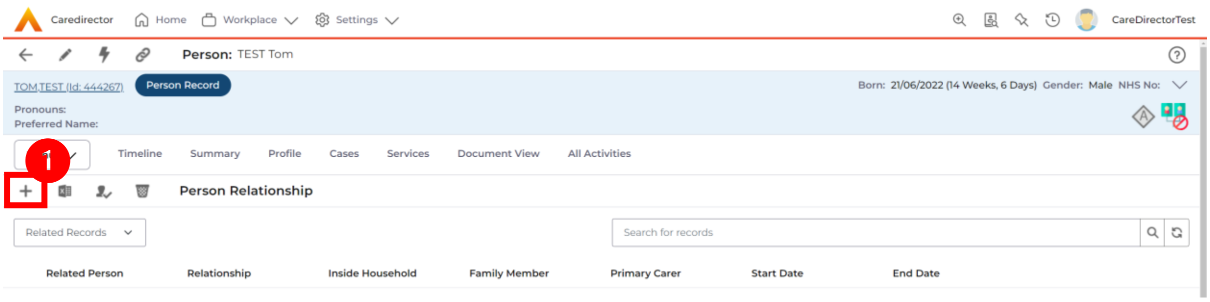


How to add relationships

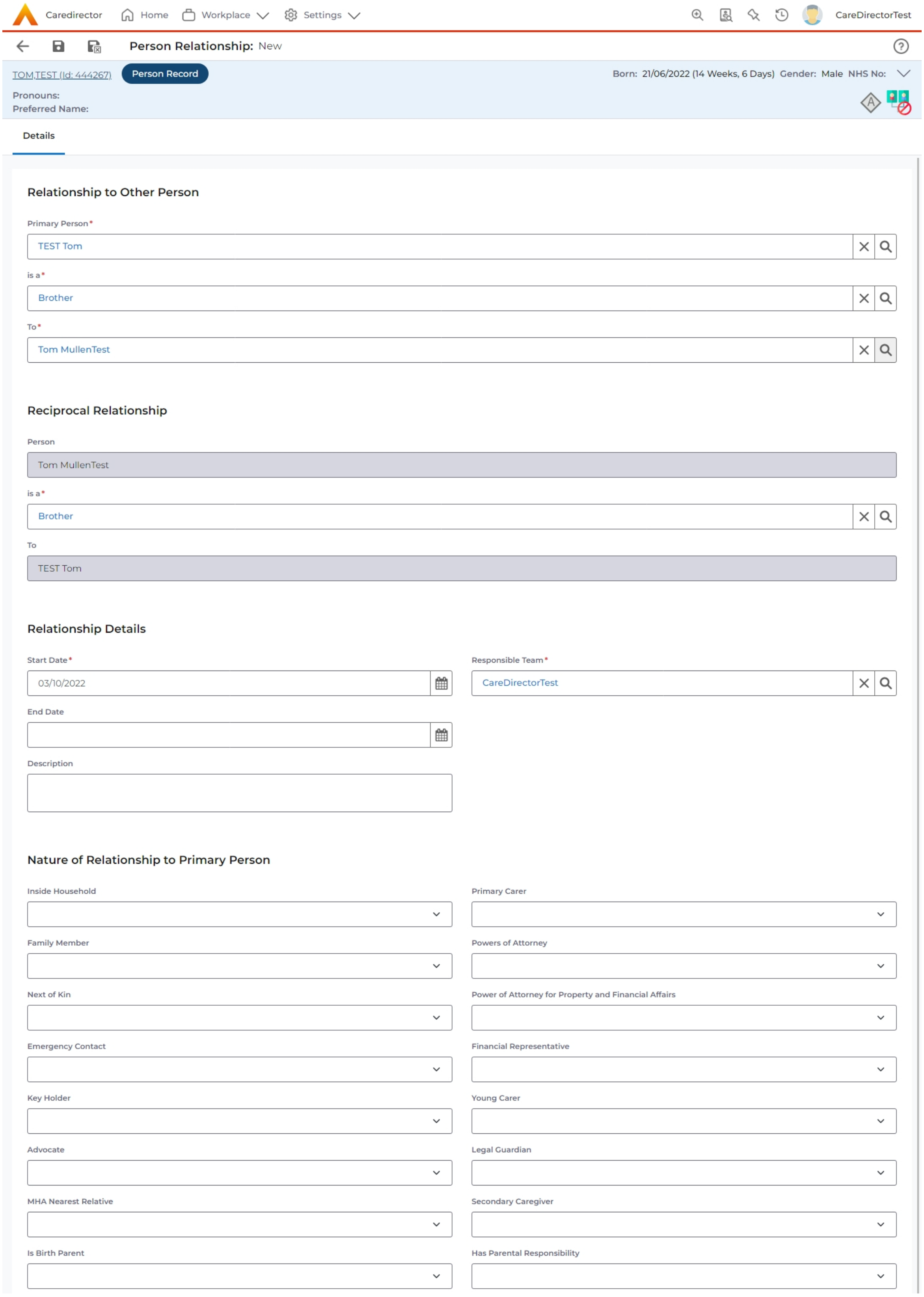
1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships.**



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.

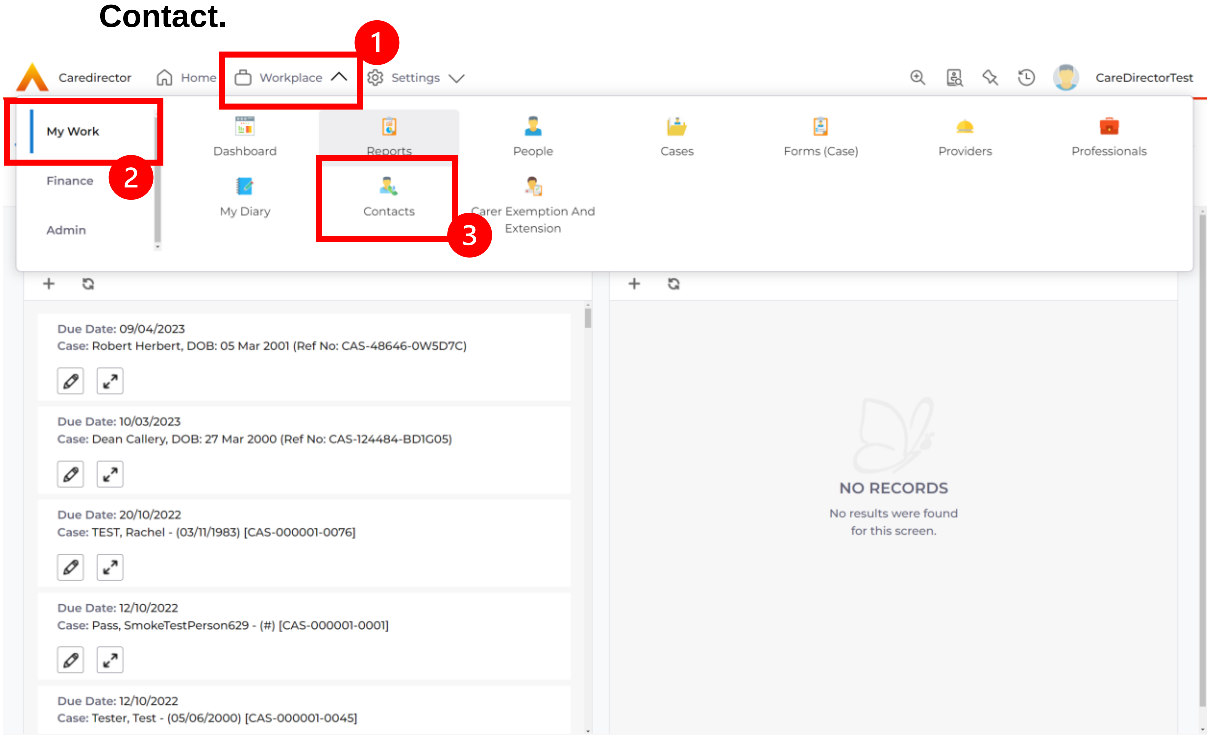


4. When finished, select **Save and Return to Previous Page.**

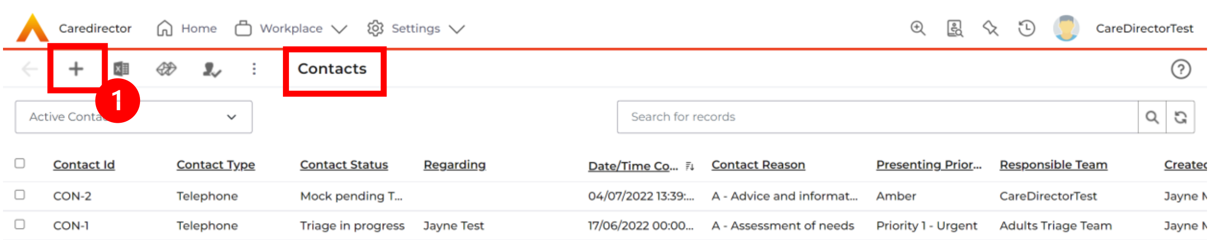
How to add a Contact

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.

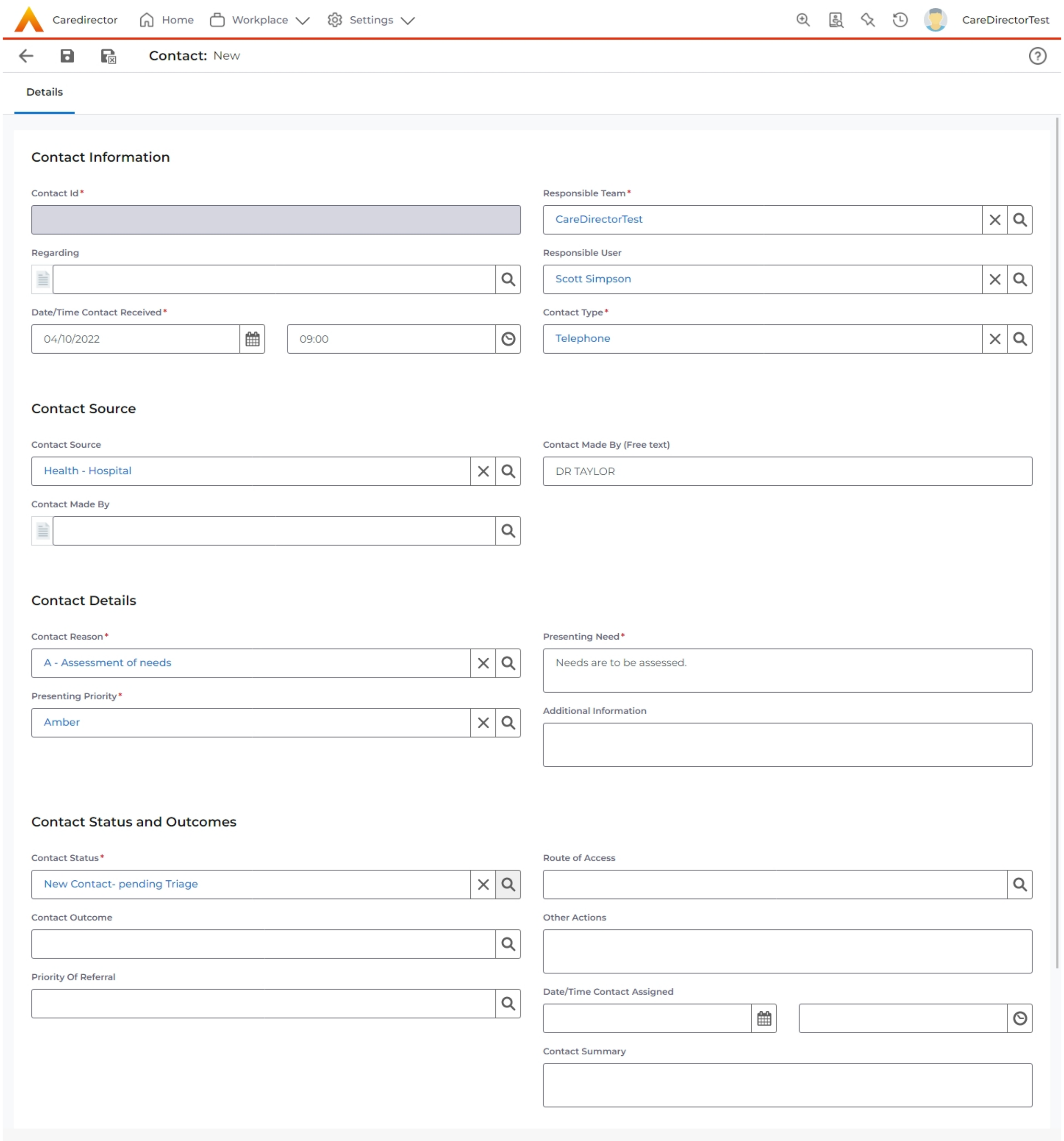
2. To create this **Contact** select **Workplace.** Then select **My Work** and **Contact.**



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

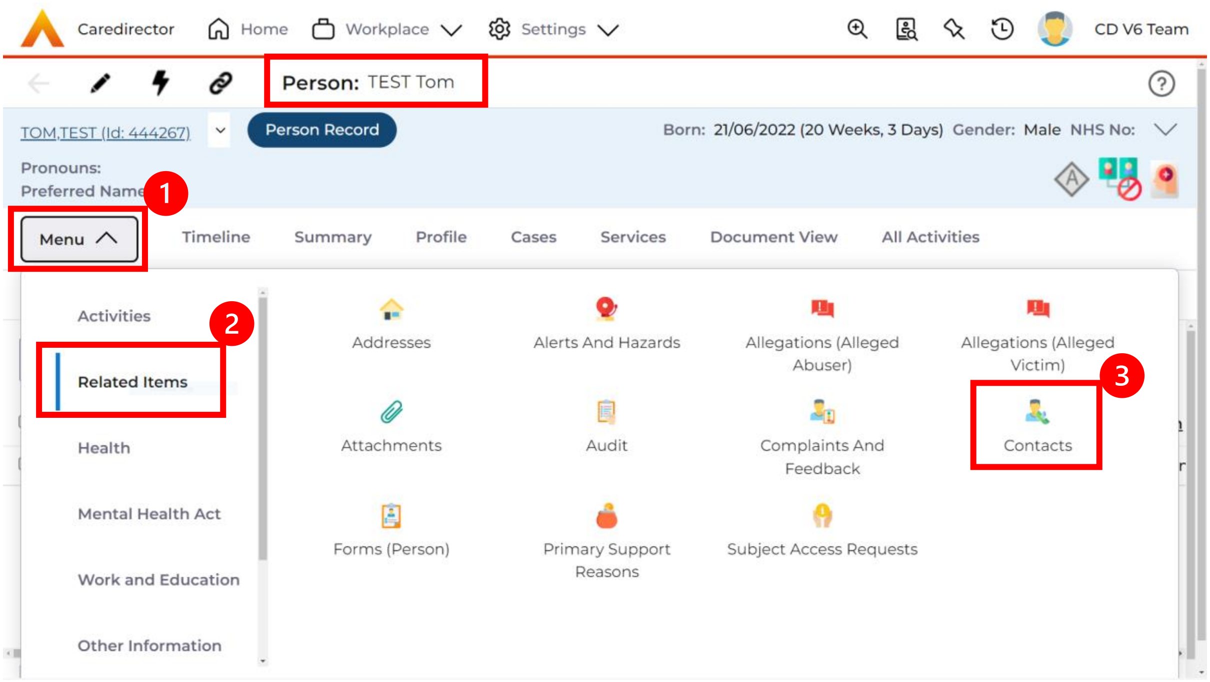


4. From the **Contact** creation screen, if later this **Contact** becomes **Triaged,** and the **Service User** is created into CareDirector then the **Regarding** field can be linked to that person. Once the information has been entered, select **Save** from the toolbar.

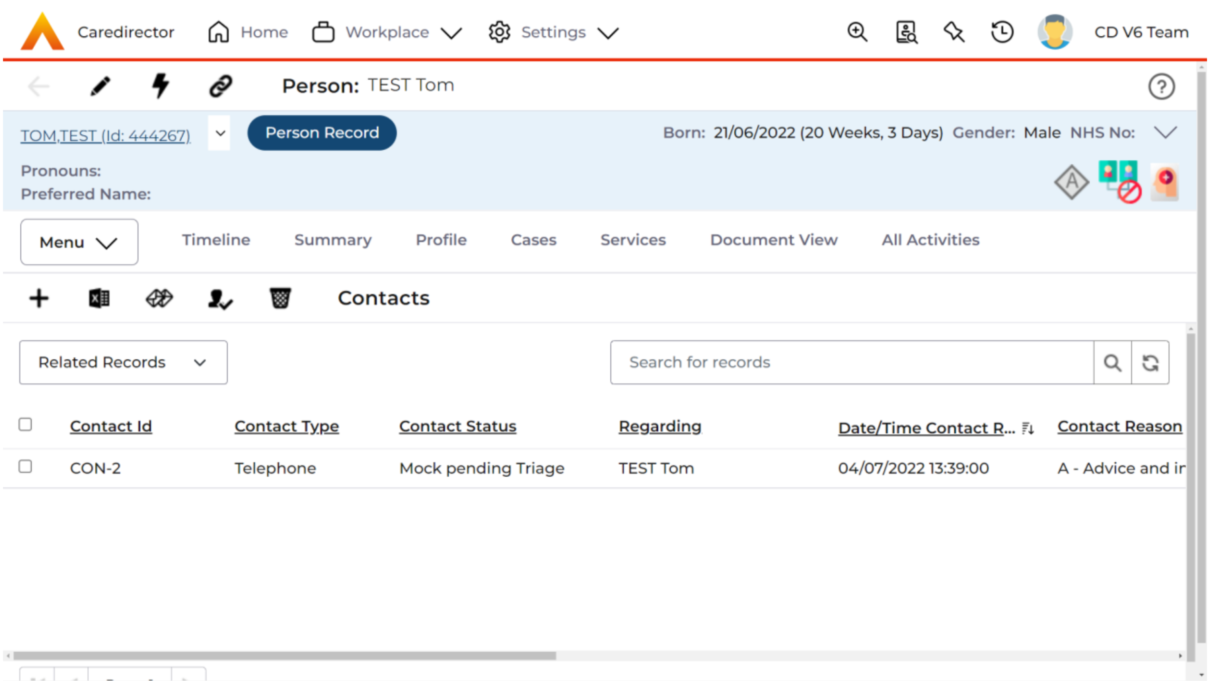


How to find a linked Contact

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



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



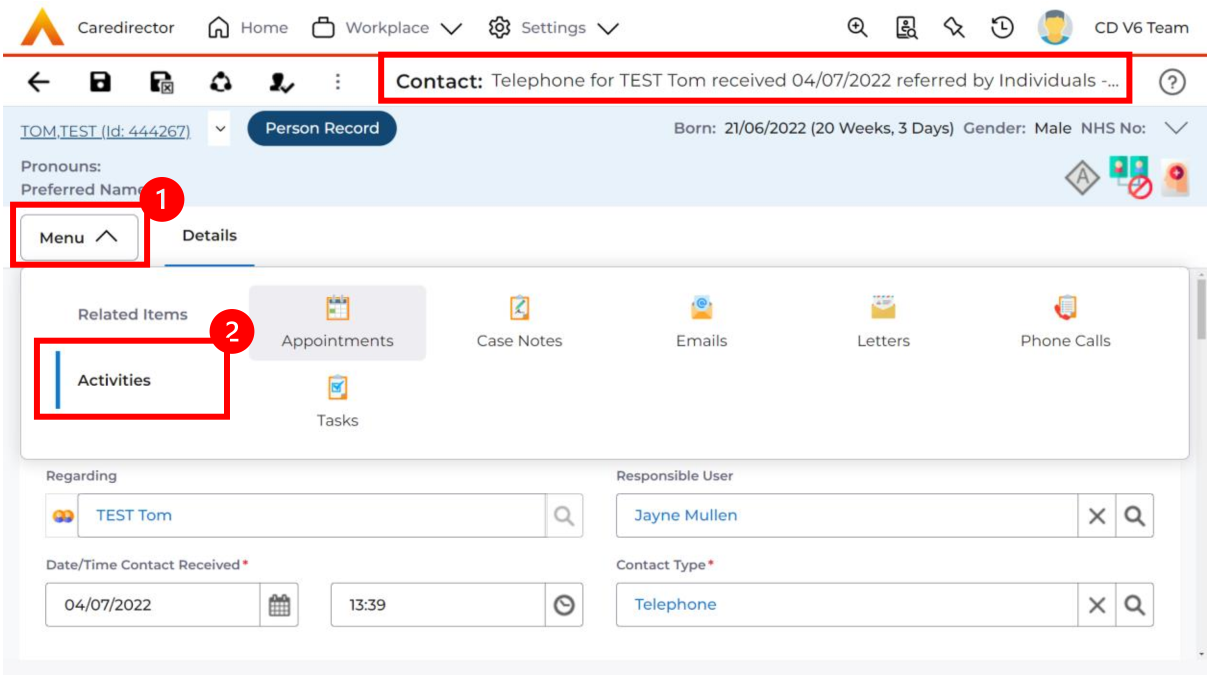
How to add an Activity to a Contact

1. Locate the **Contact**,

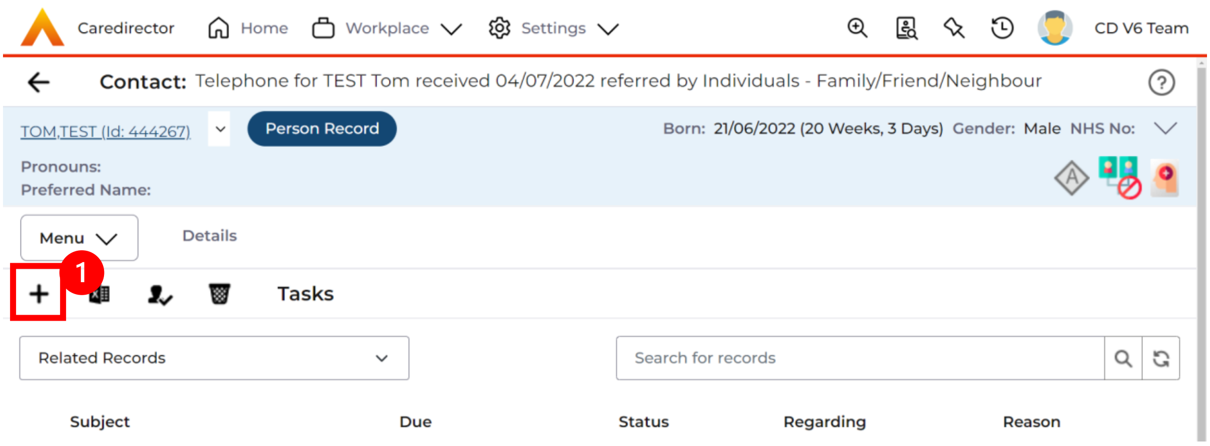
    a. Unlinked Contact: **Workplace, My Work** and then select **Contacts**.

    b. Linked Contact: **Menu, Related Items, Contacts.**

2. Select **Menu,** then **Activities** and select the relevant **Activity.**



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

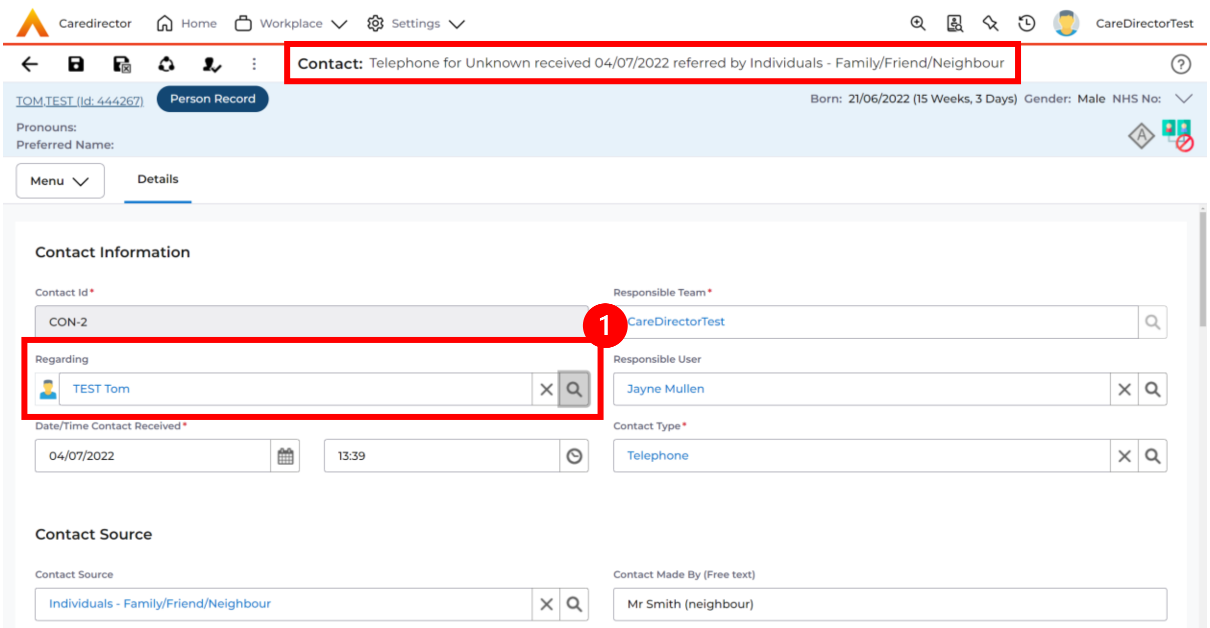


4. When finished, select **Save**.

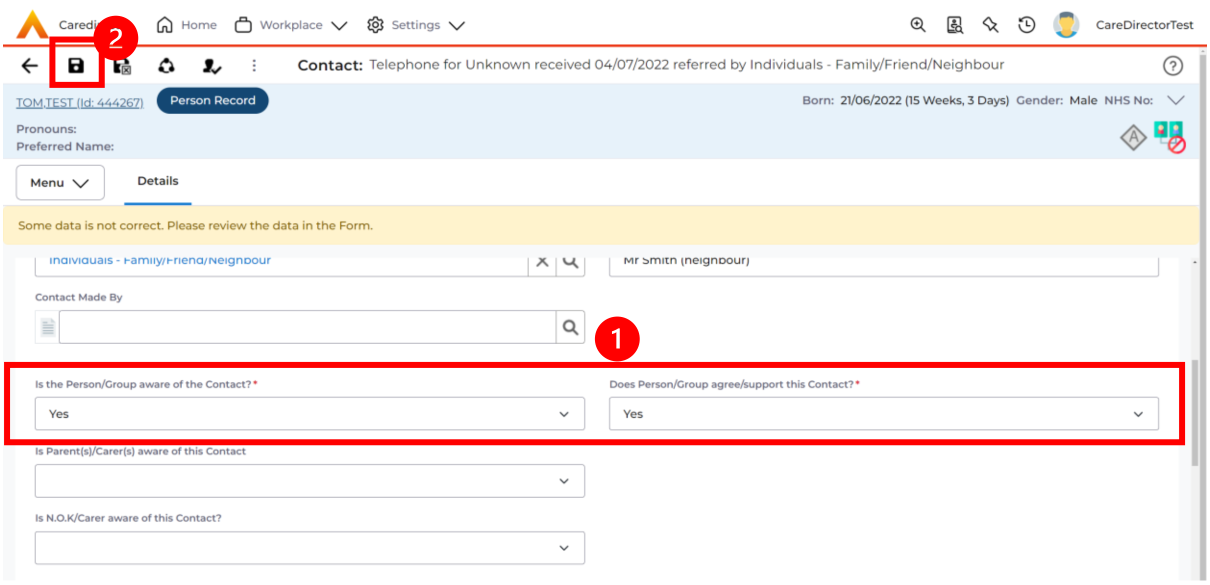
How to link a Contact to a Person Record

1. A **Contact** can be linked to a **Service User** later when details become known, and they are created into **CareDirector.**

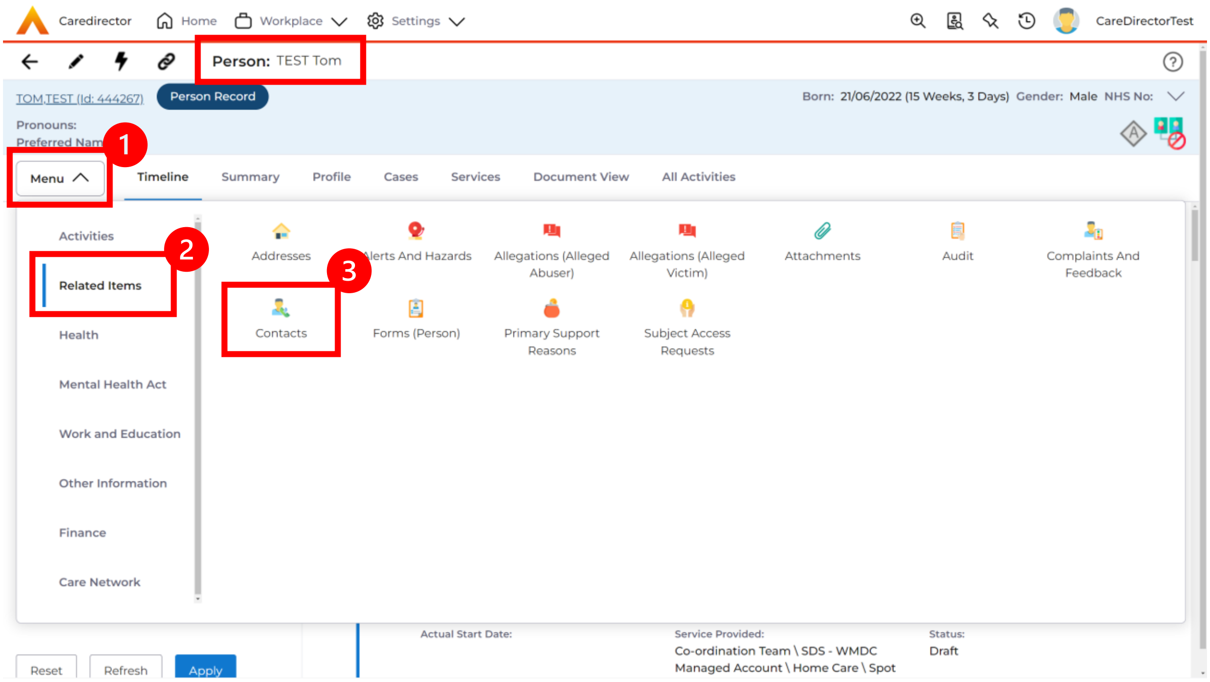
2. After the **Service User** has been created onto the system and the **Contact** is triaged. Locate the **Contact** and under **Regarding** find the created **Service User** using the **Lookup** function.



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



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



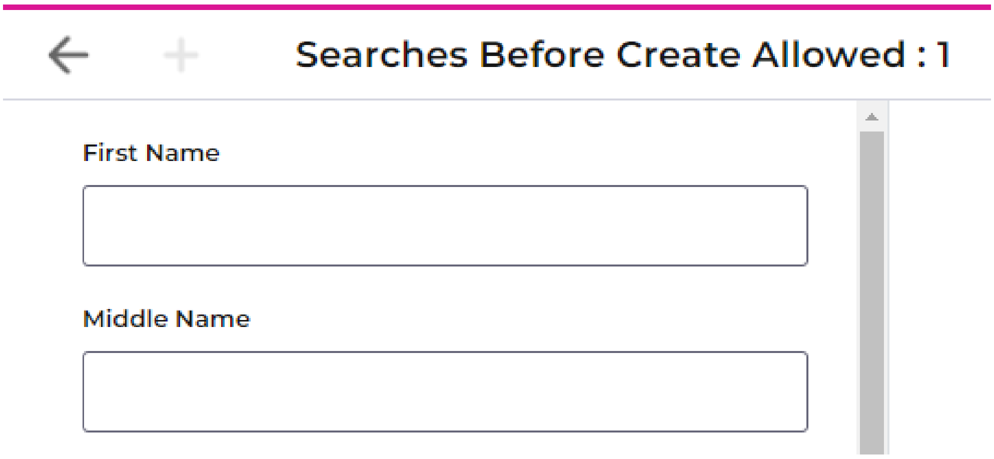
How to create a Person Record

Duplicate Detection

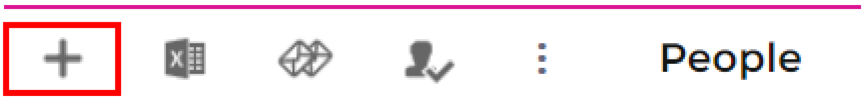
1. Before a **Person Record** can be created a **Person Search** must be done.

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.

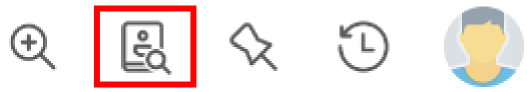


4. Select the **Created New Record** button and create a Person record.

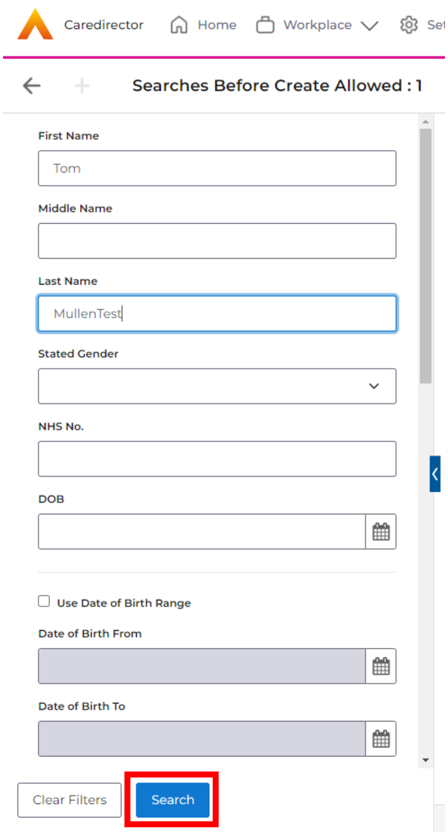


Adding a Person Record

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



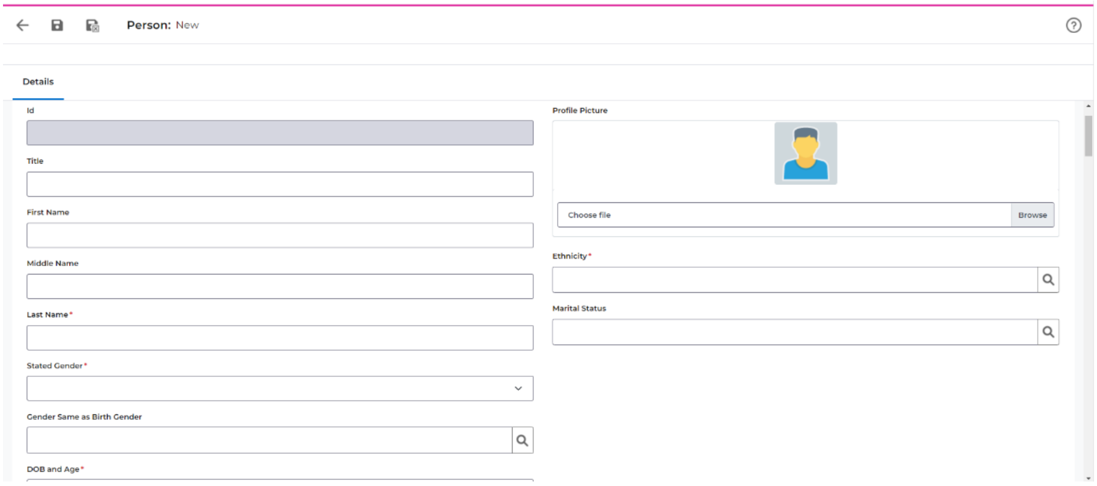
2. Search person to check for record.



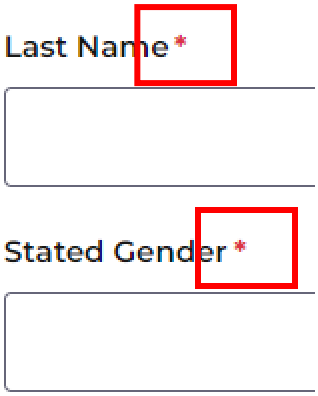
It is required of users to perform at least one search of an existing Person Records before they can create a new one.

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

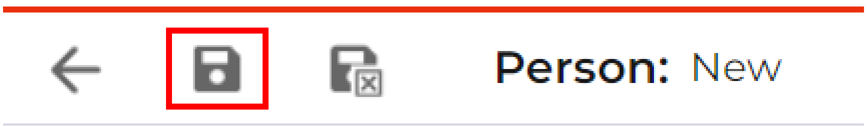
4. The Person: New record is displayed.



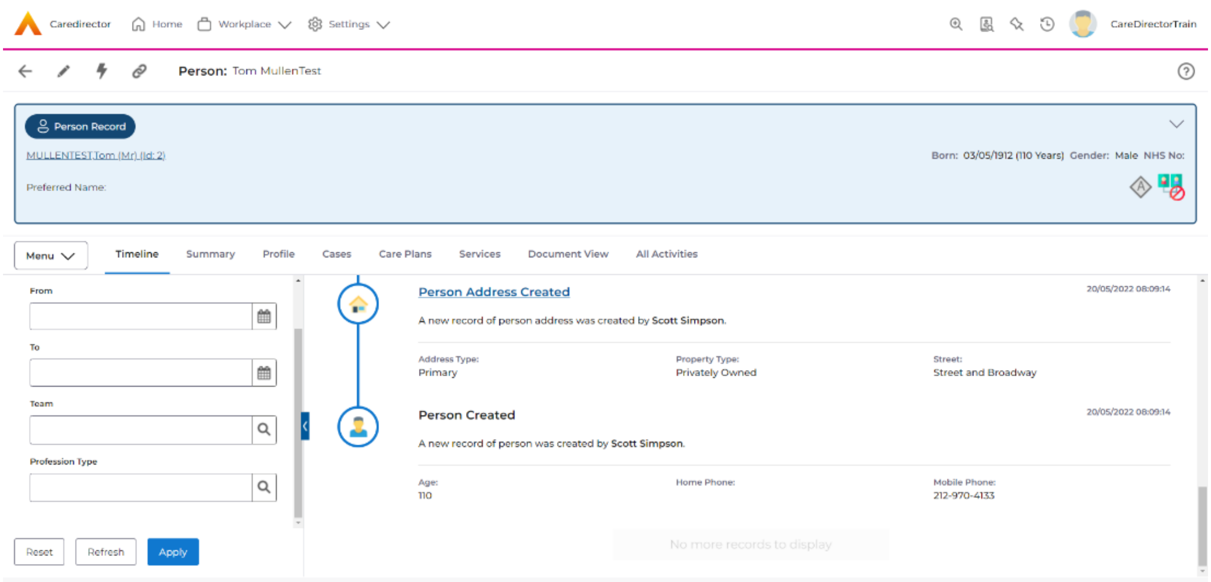
5. Complete the fields as required. Mandatory fields are marked with a red asterisk.



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

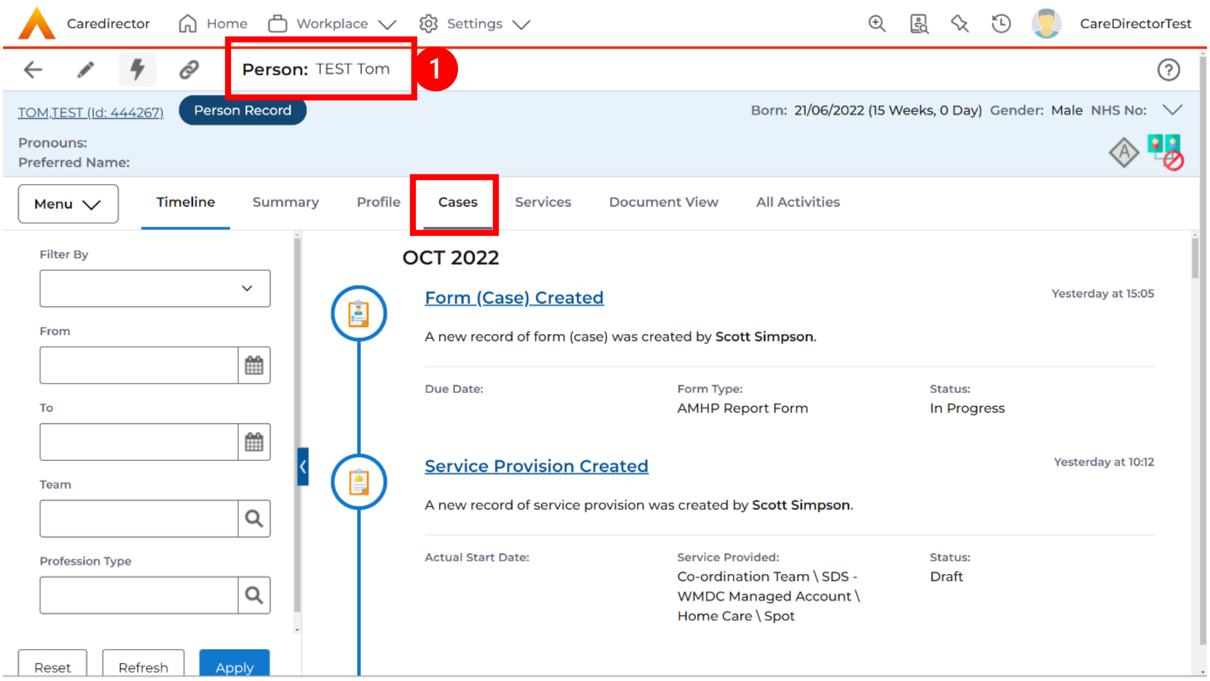


7. The **Person Record** will then be displayed.

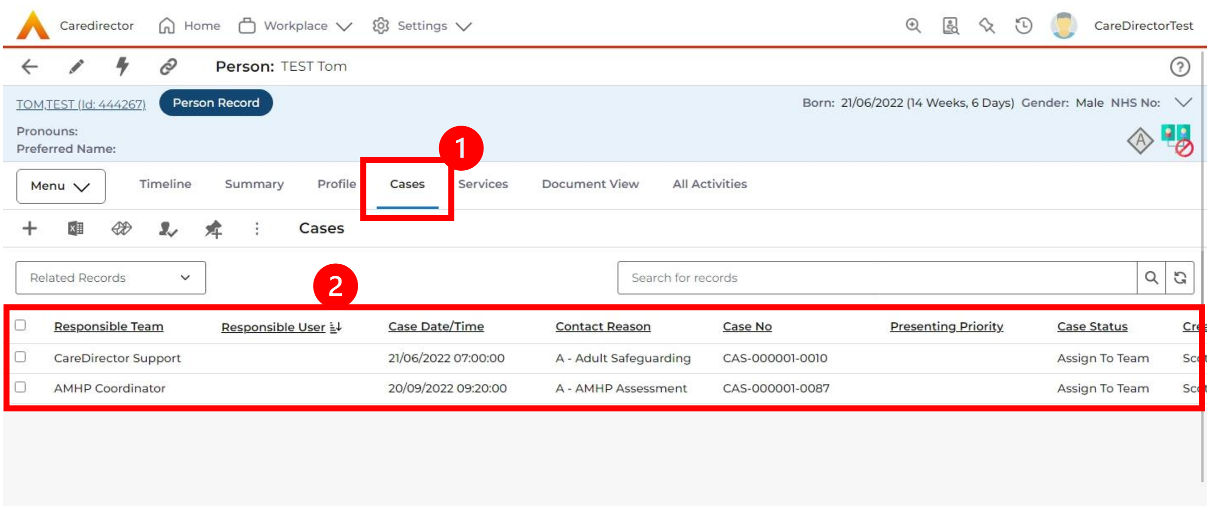


How to search for a Case

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

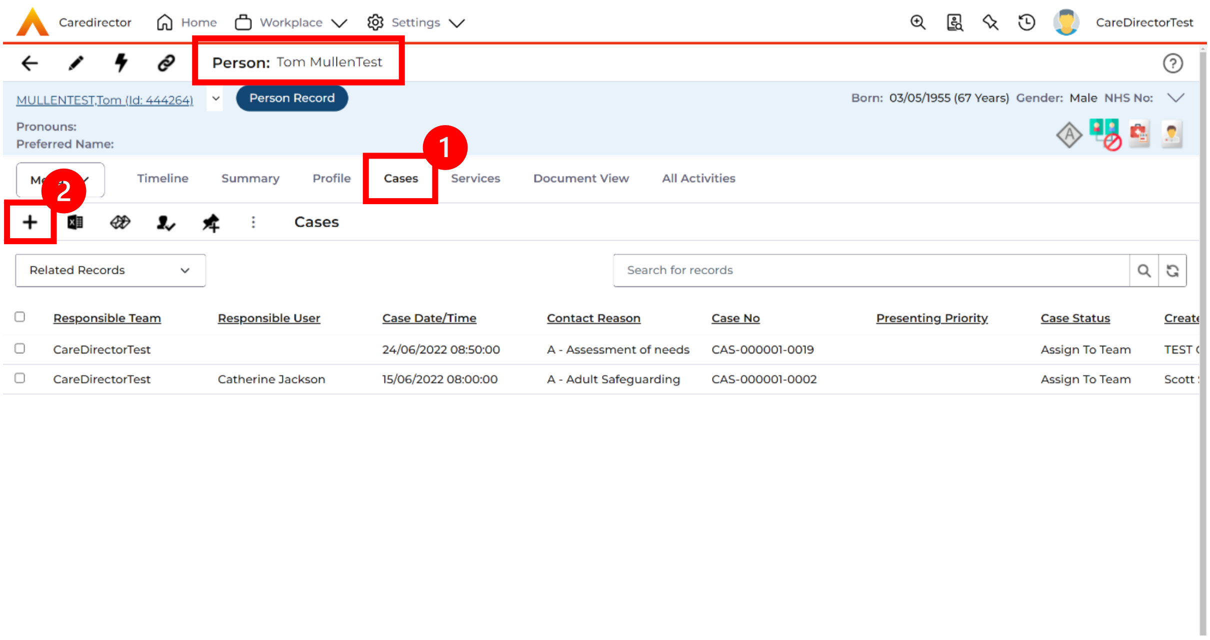


2. When found, select it to open the **Case Record**.

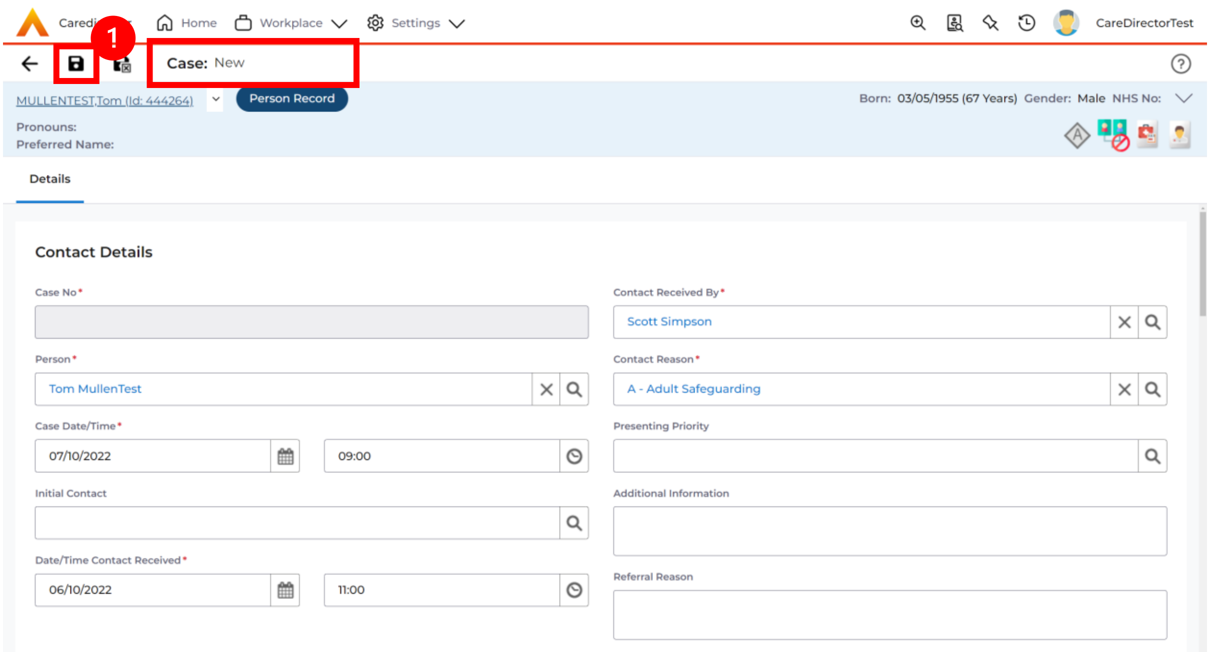


How to create a Case

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

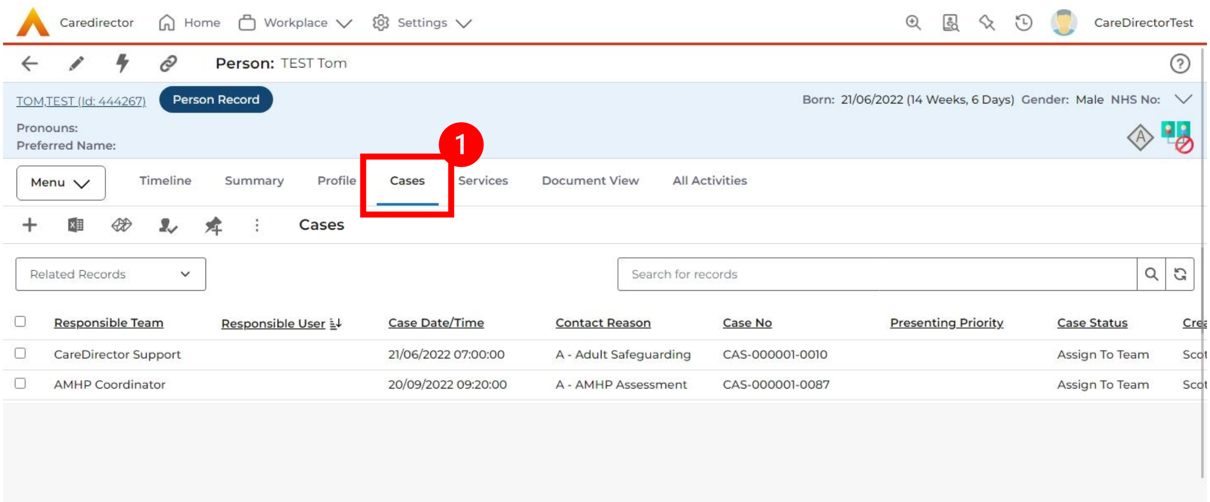


2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

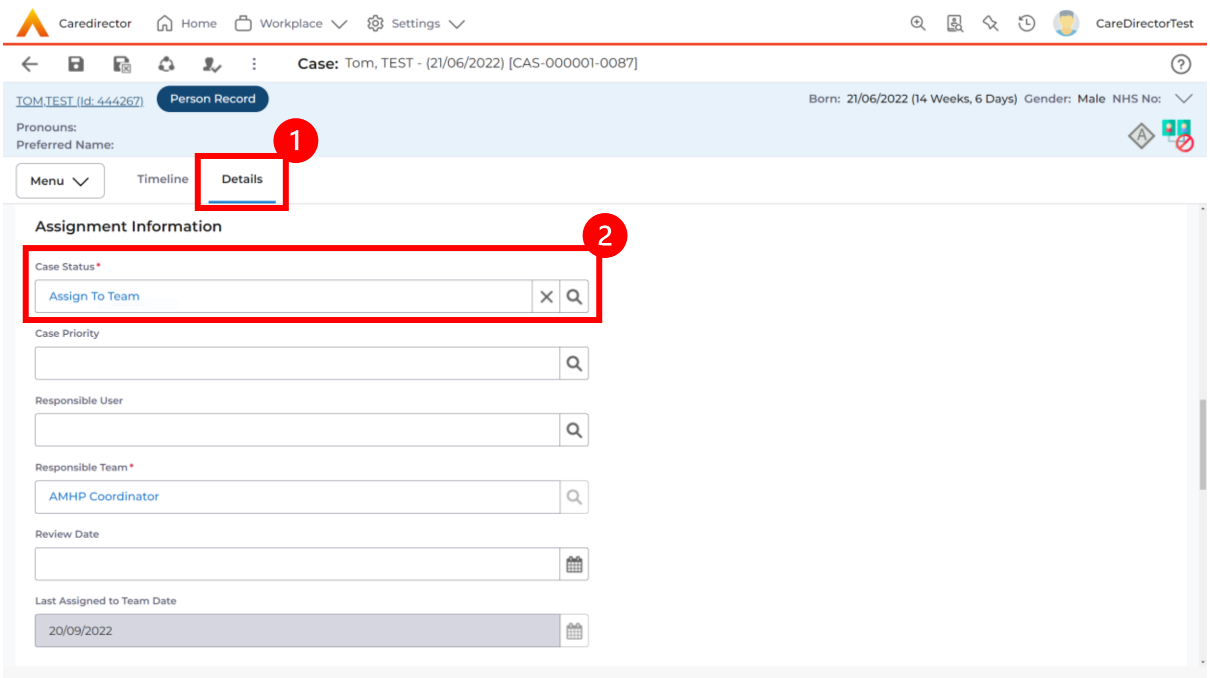


How to check the Case Status

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

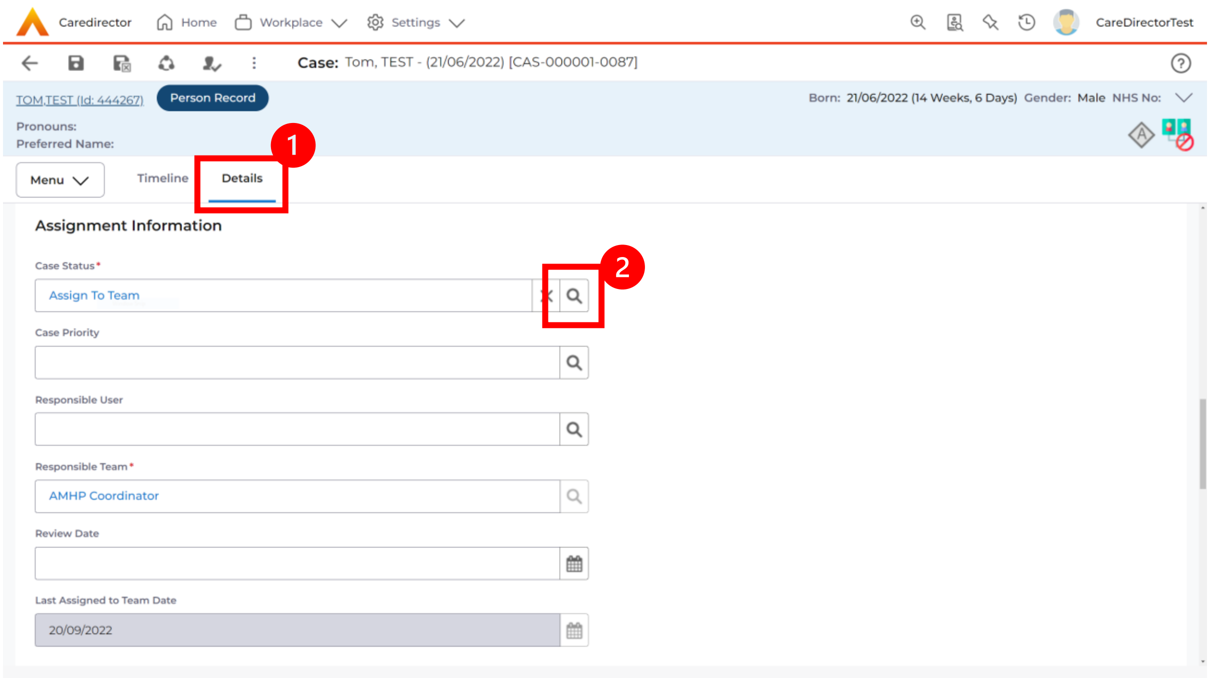


2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case** is **Allocated, Closed Under Review, etc.**

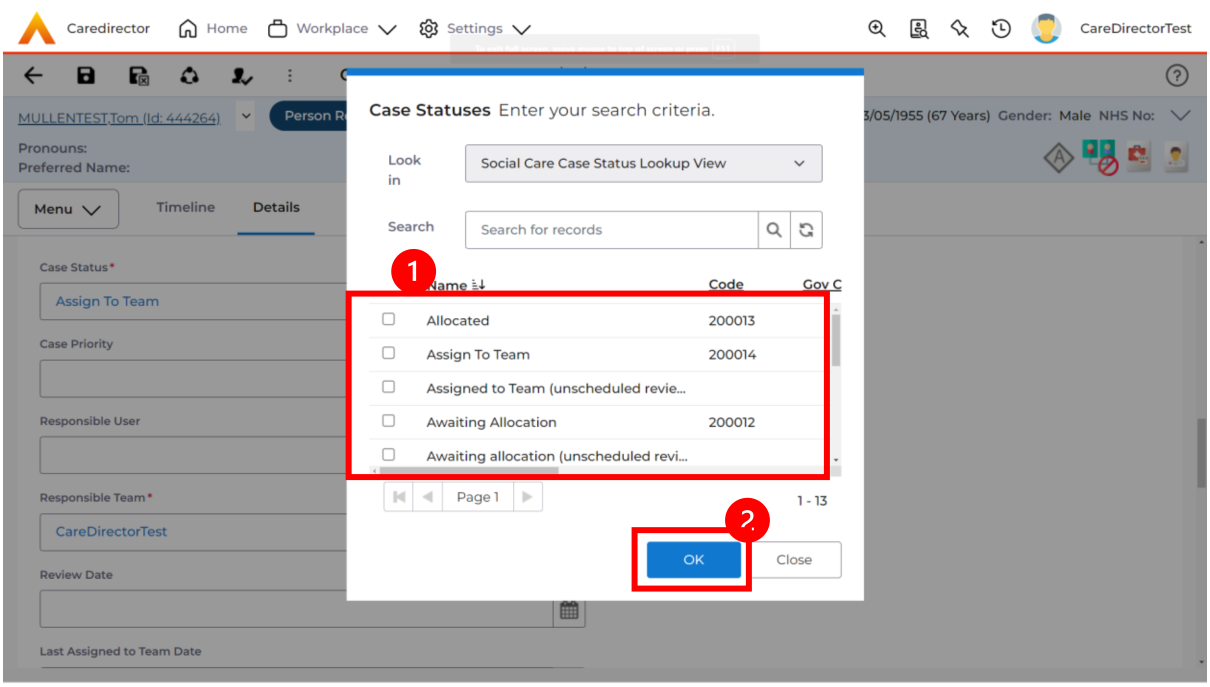


How to change the Case Status

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



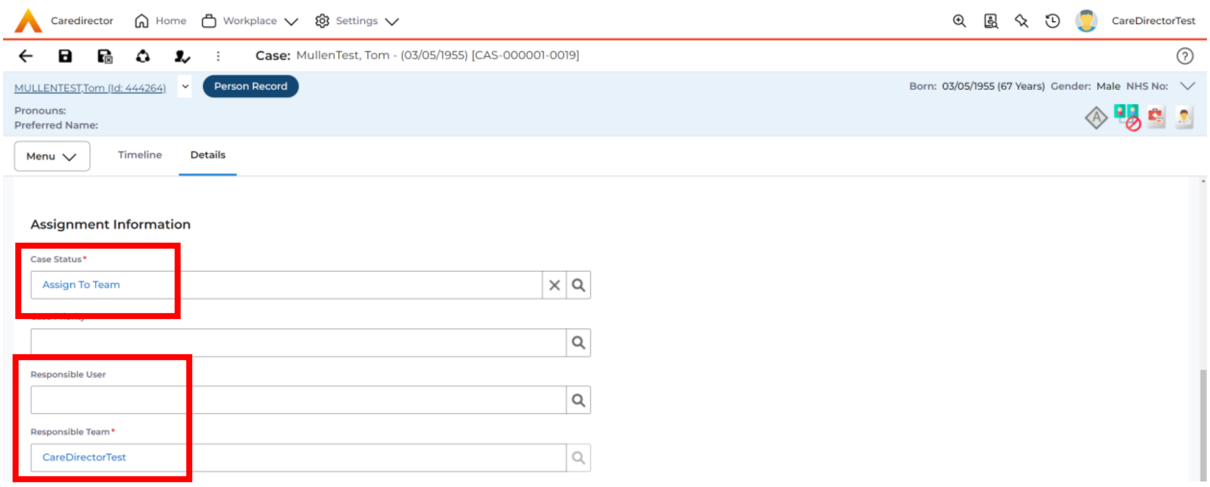
2. Choose the relevant option and select **OK** when found. Select **Save.**



How to Allocate a Case to a Worker

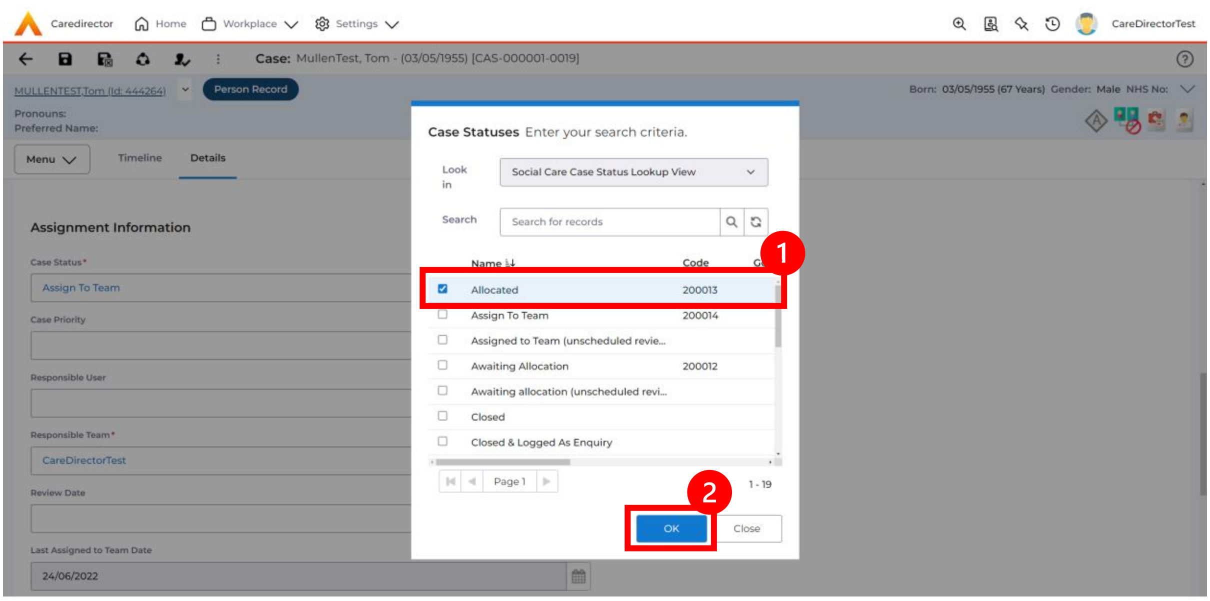
1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route.**

2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.

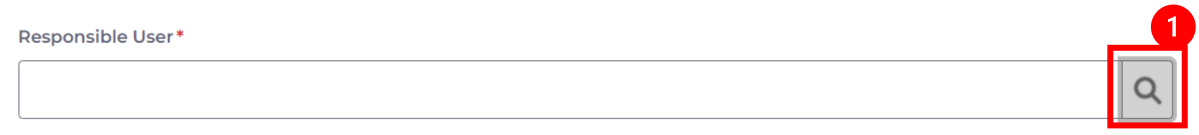


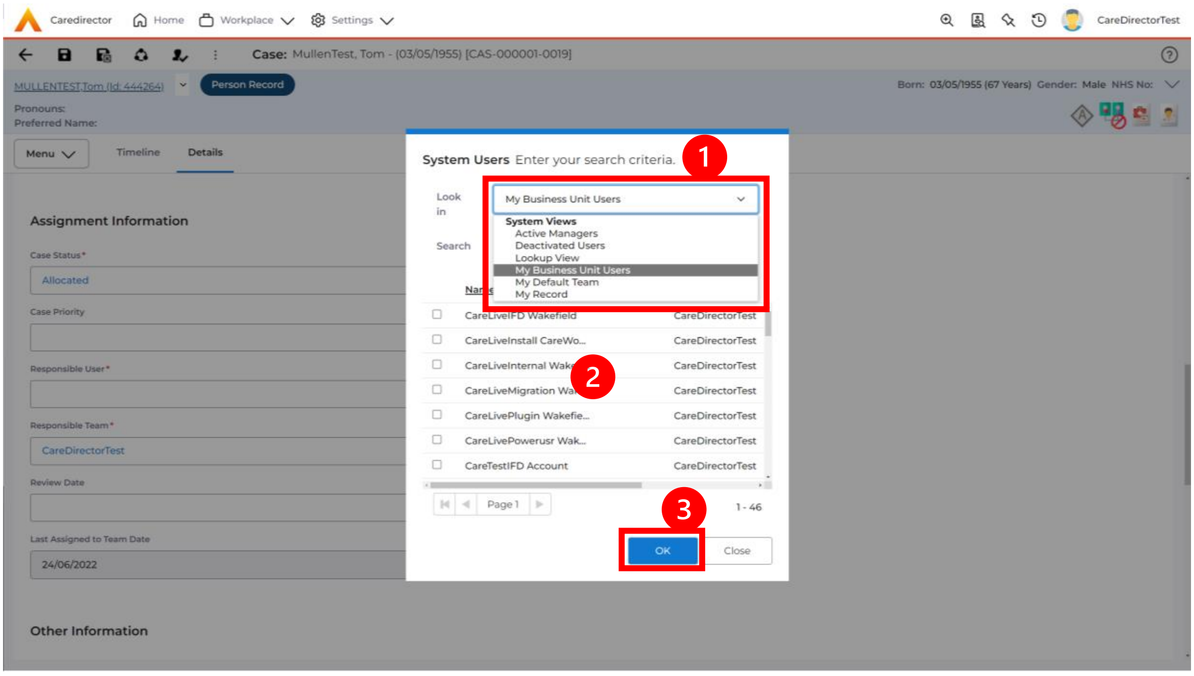
3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.

4. First select the **Lookup function** on the **Case Status** field and select **Allocate**. Then select **OK**.

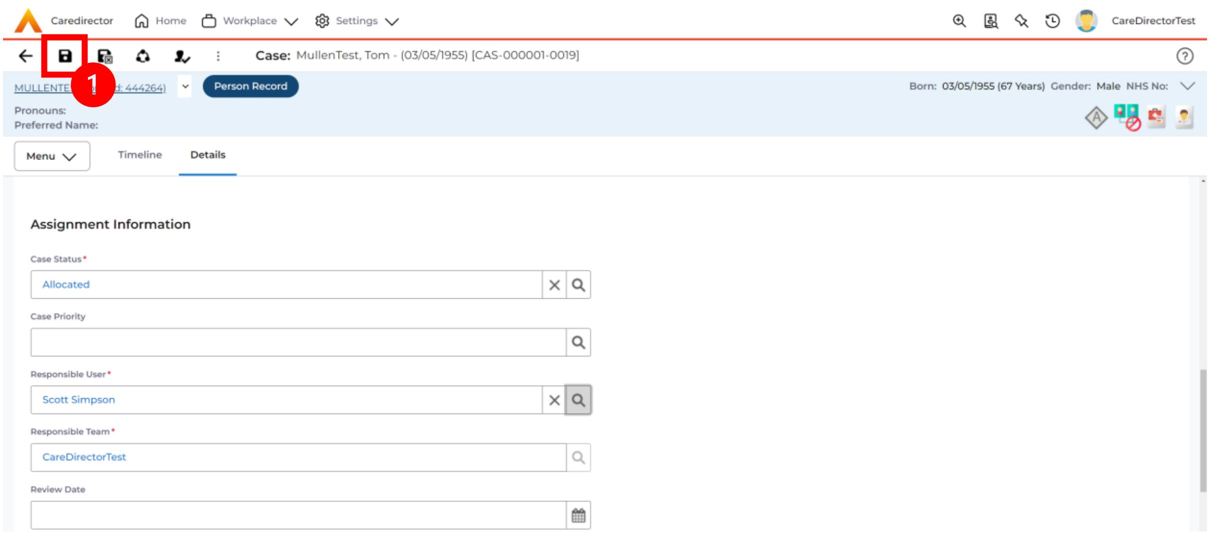


5. After, the **Responsible User** field will be mandatory. Use the **Lookup function** and select the **Responsible User** for this **Case**. When selected, select **OK.**





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

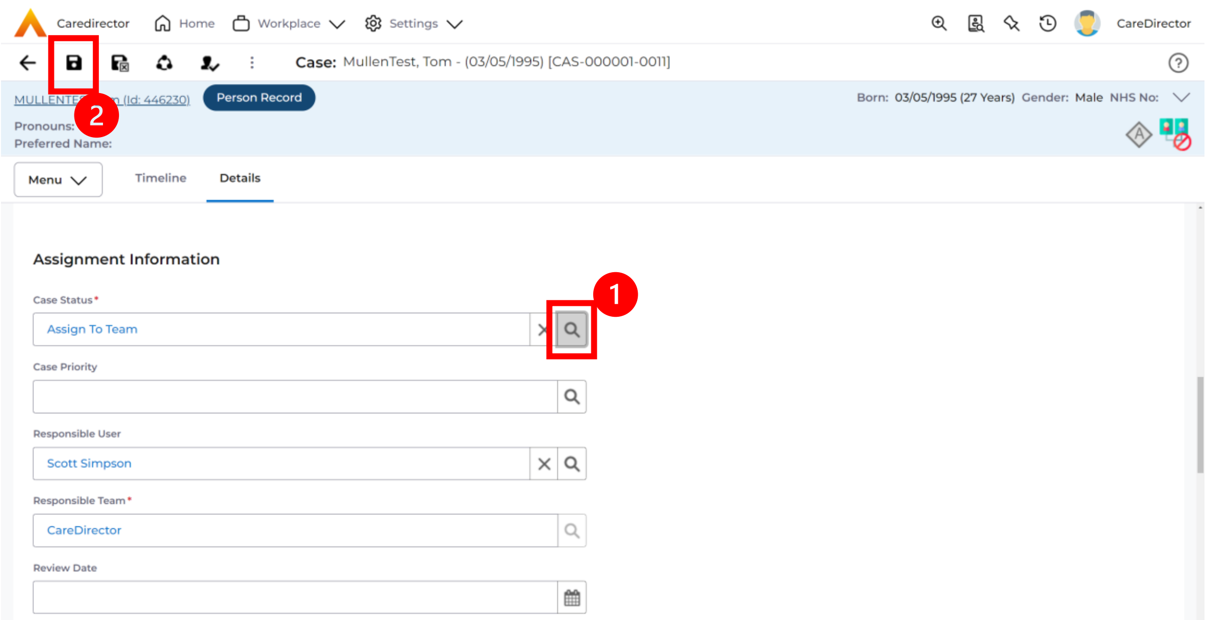


How to send a Case to another team

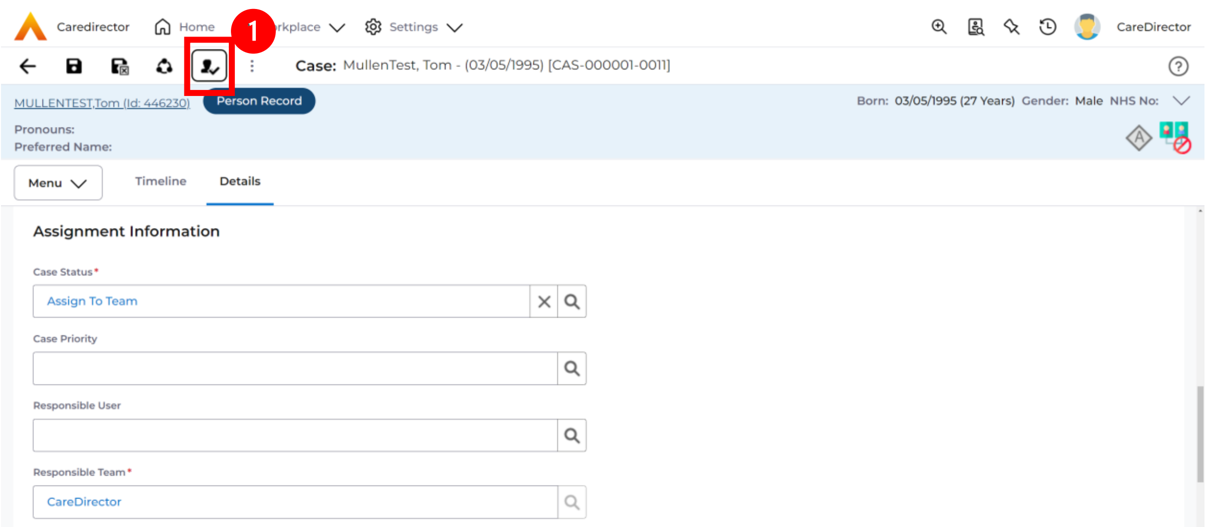
1. There may be reasons that a **Case** needs to be sent to another team.

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**.

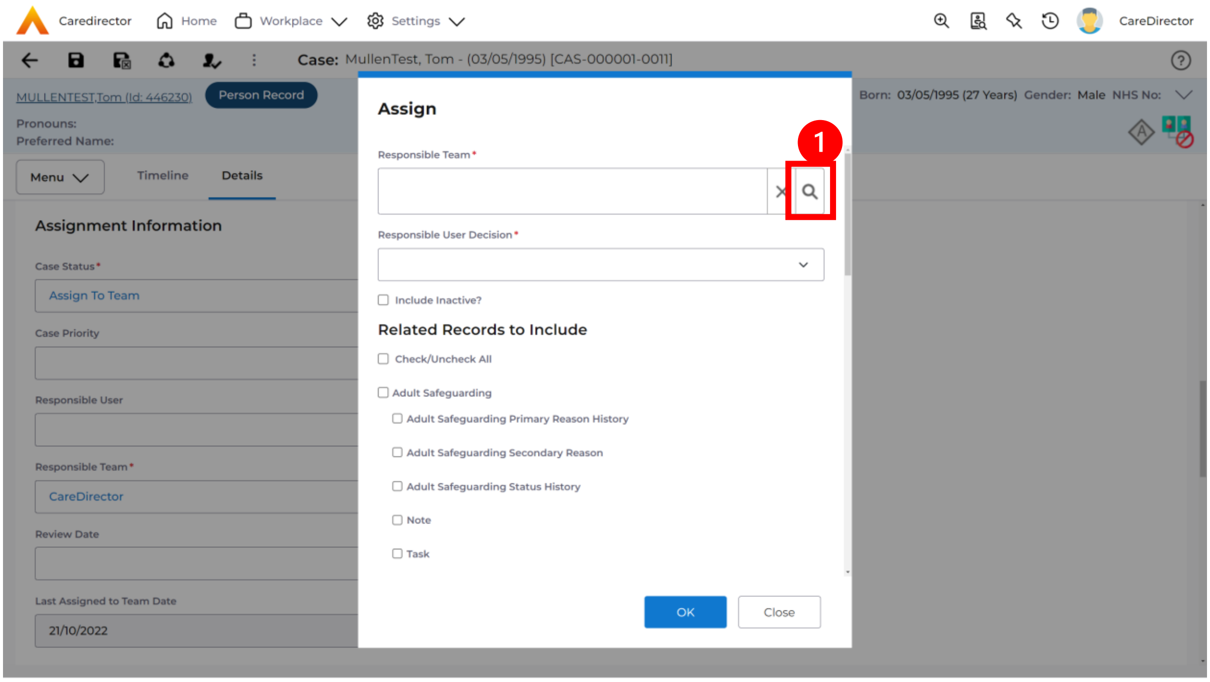
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save.**



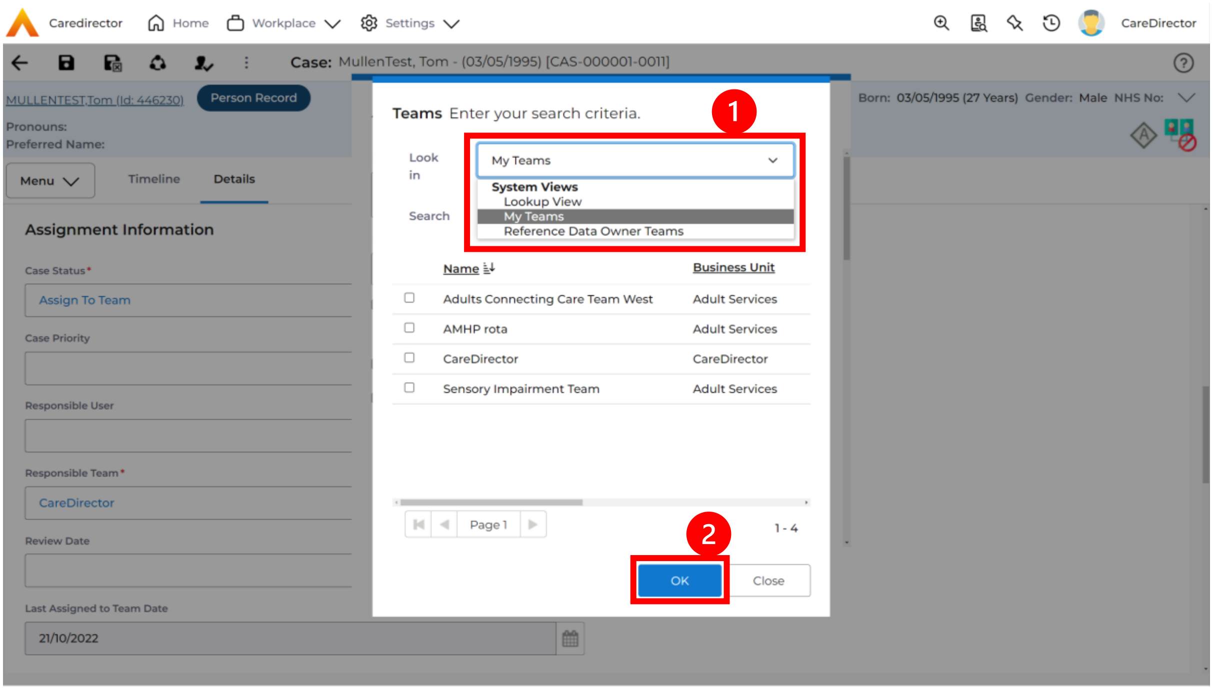
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.



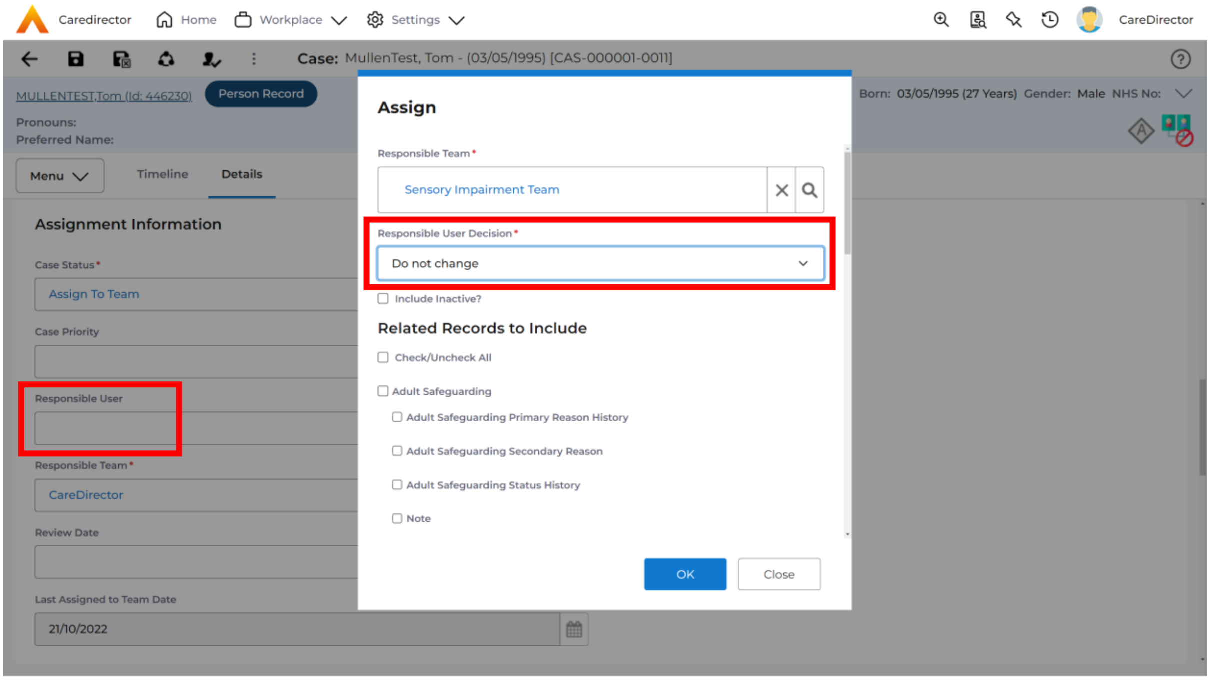
5. This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup function.**



6. 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.**



7. 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.**

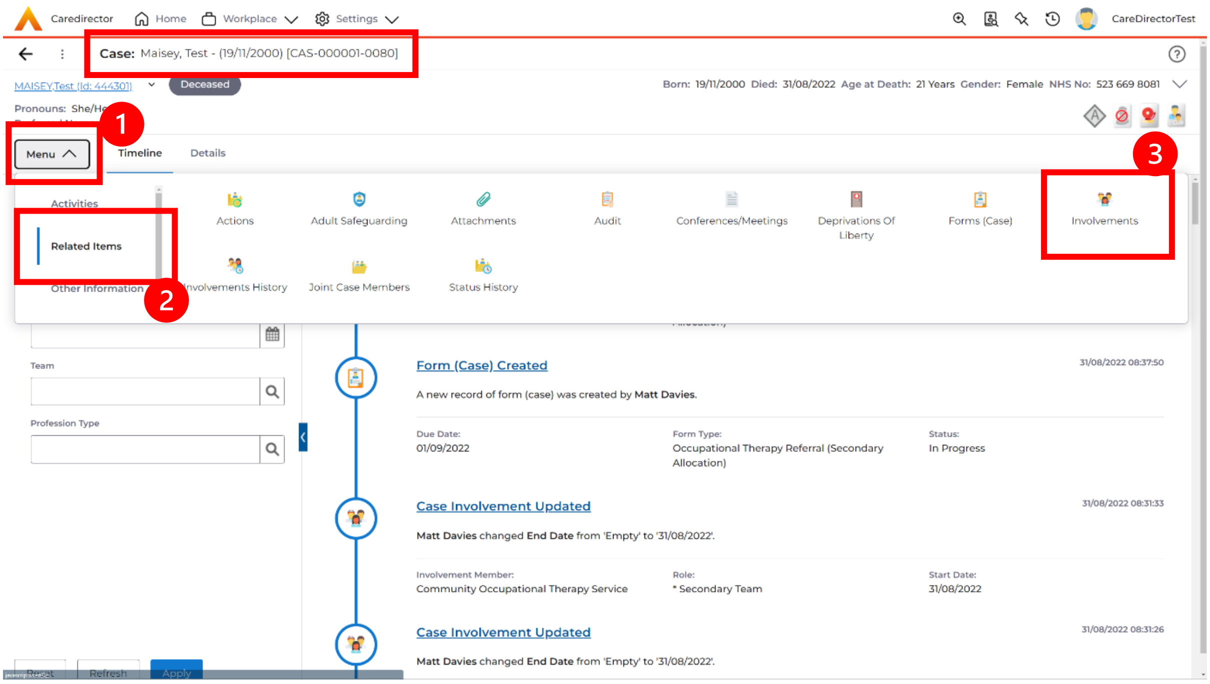


8. When finished, select **OK.** It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

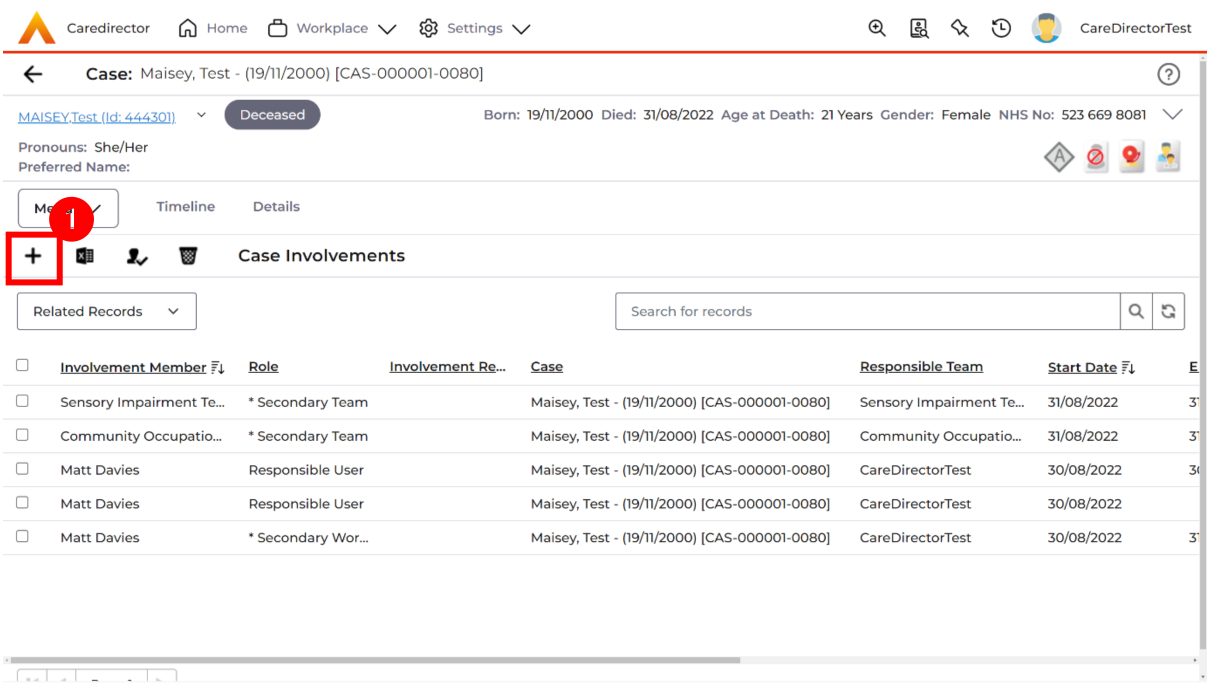
How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.

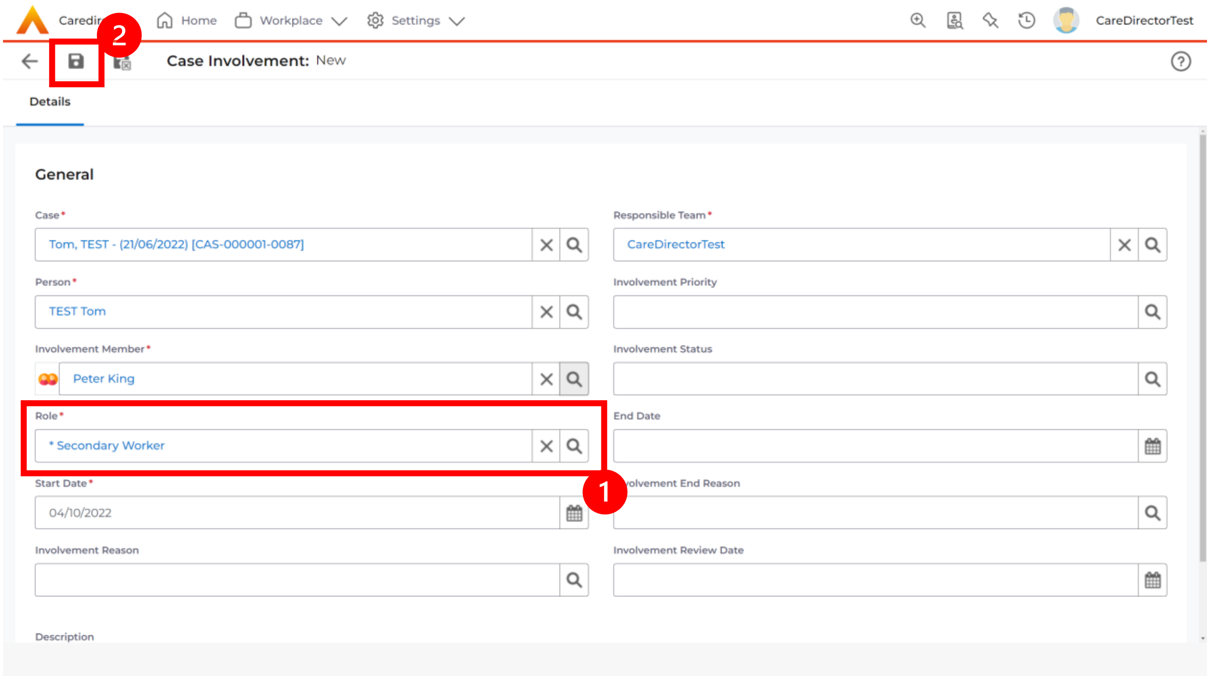
2. Select **Menu, Care Network** select **Involvements.**



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

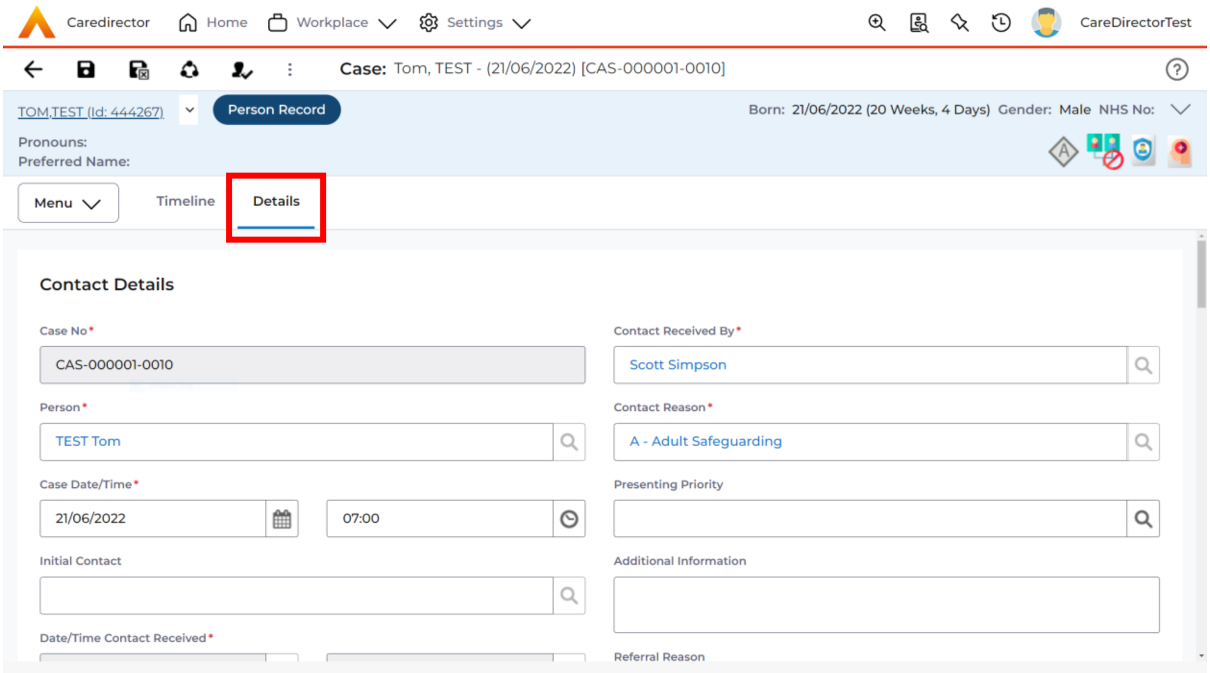


4. Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save.**

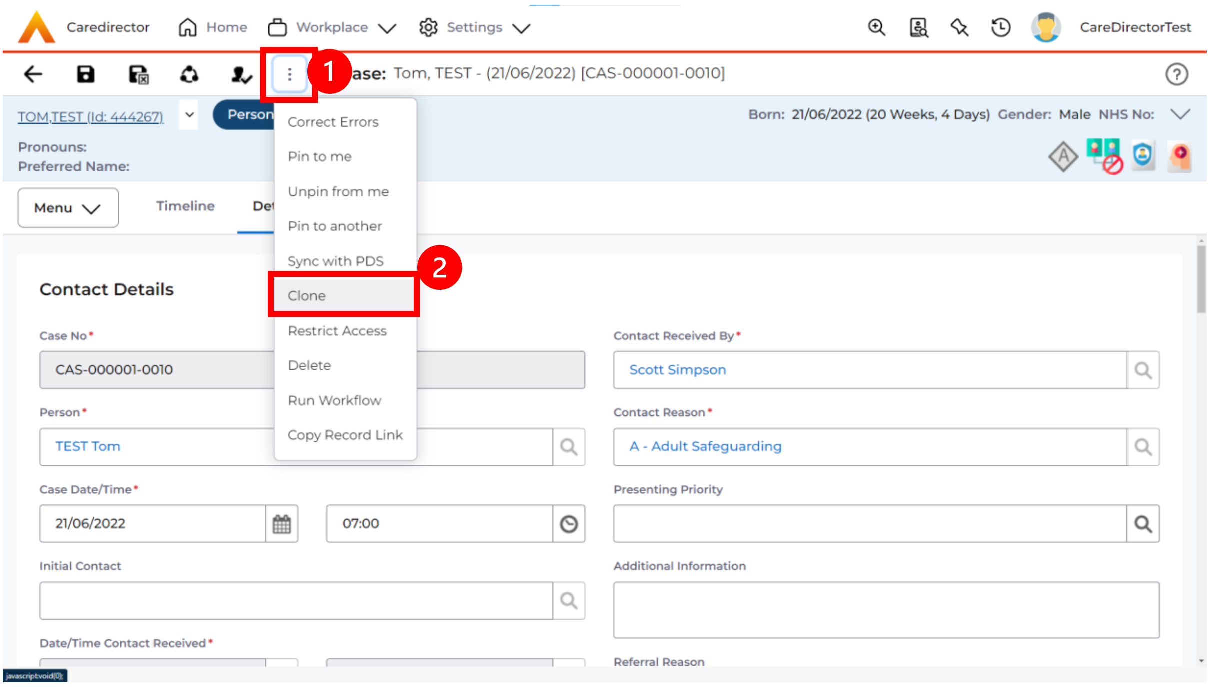


How to clone a Case

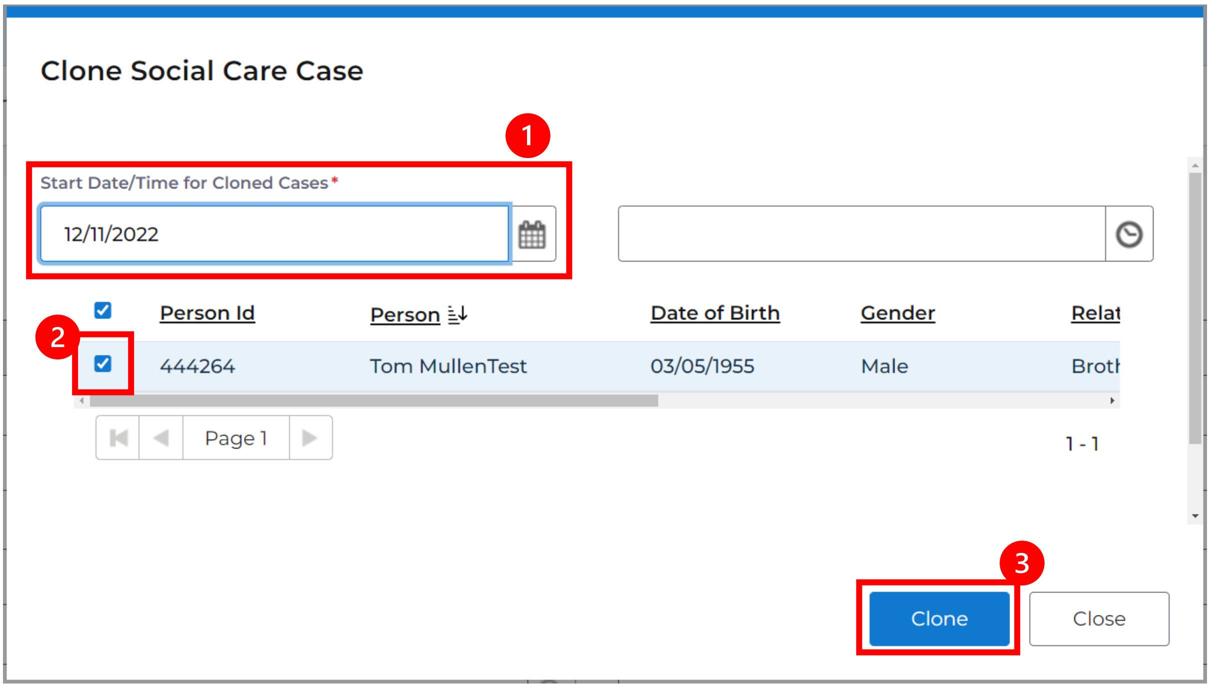
1. Locate the **Case** you want to **Clone**. Select **Details** tab.



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

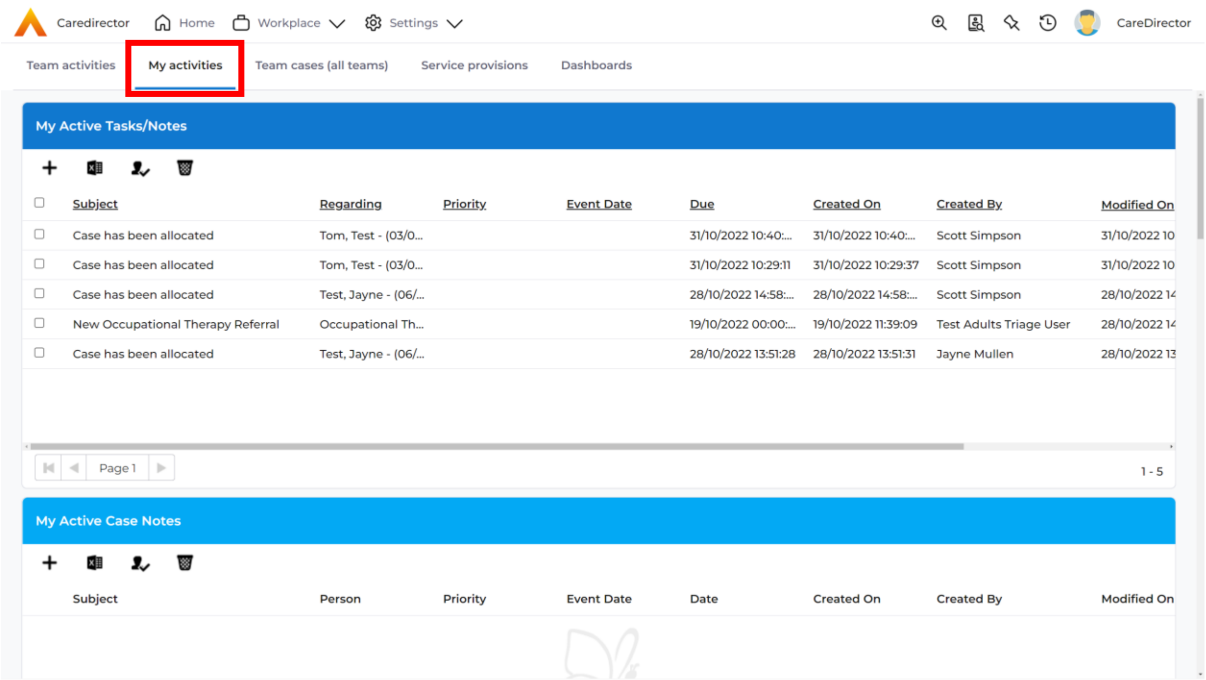


3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone.**

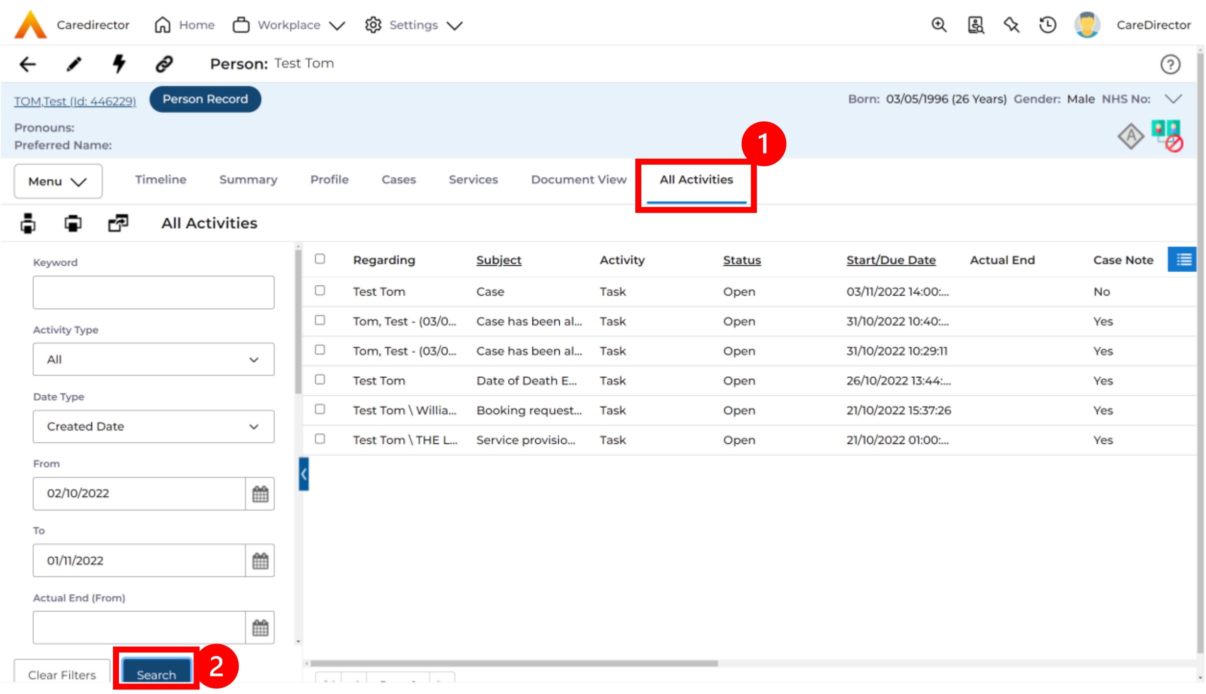


How to find Activities

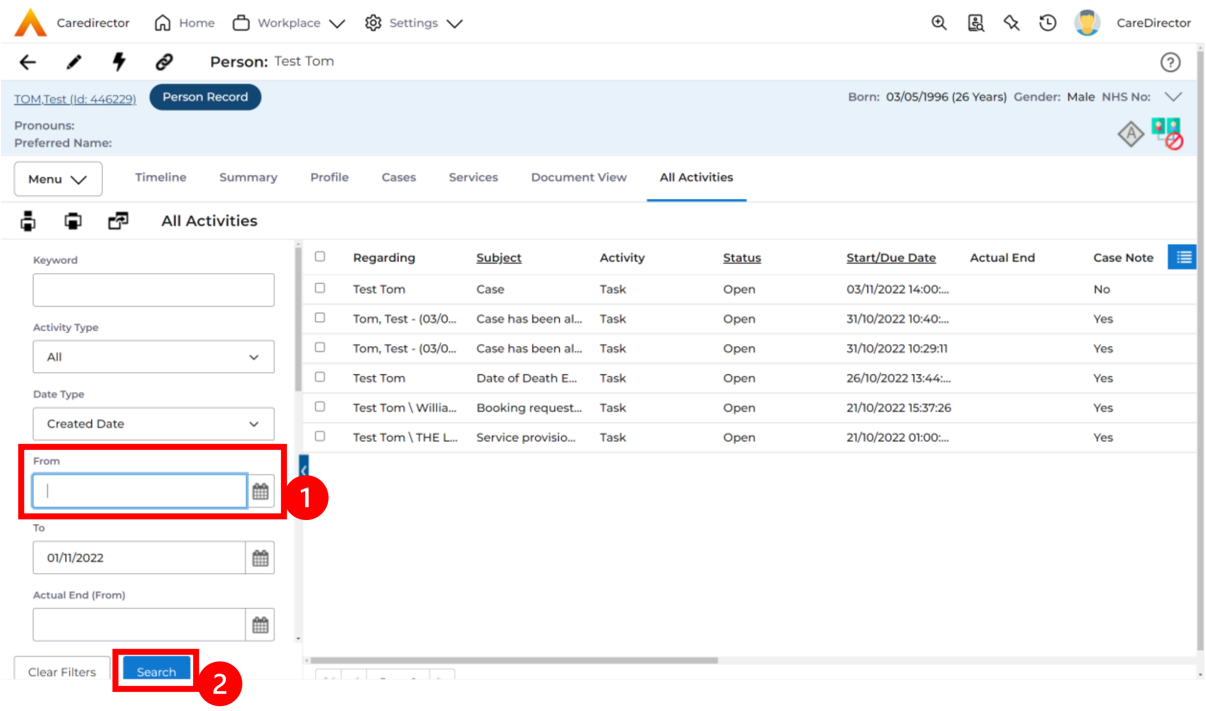
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



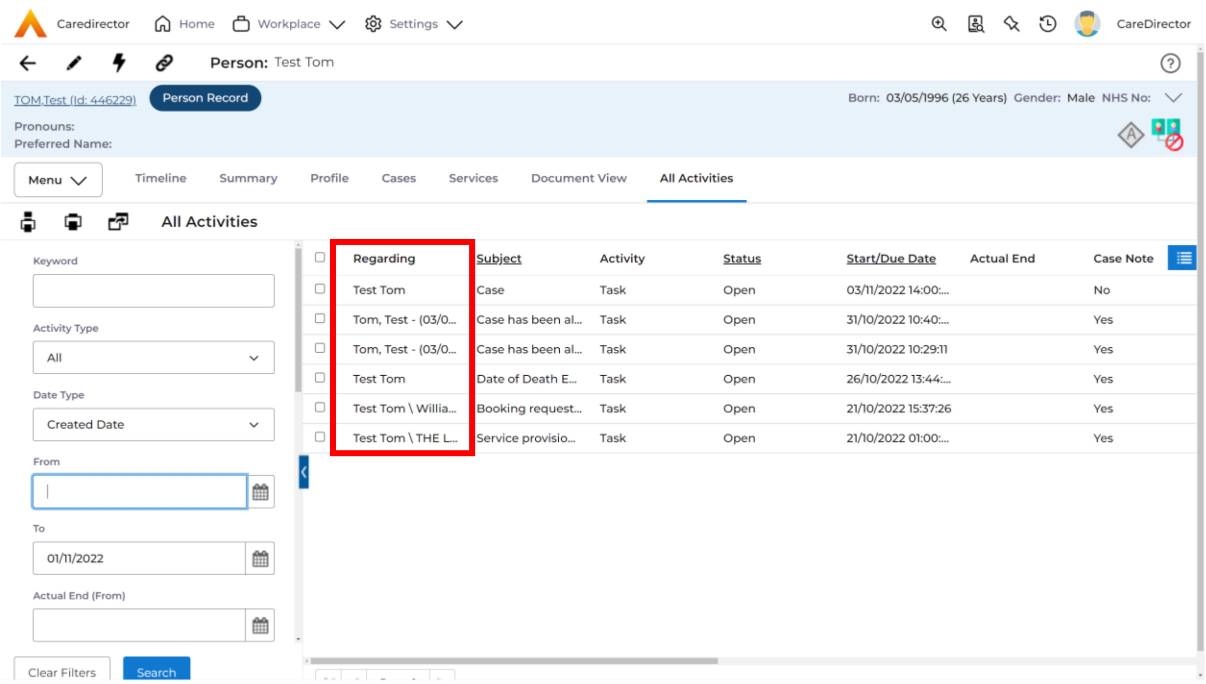
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



3. 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.

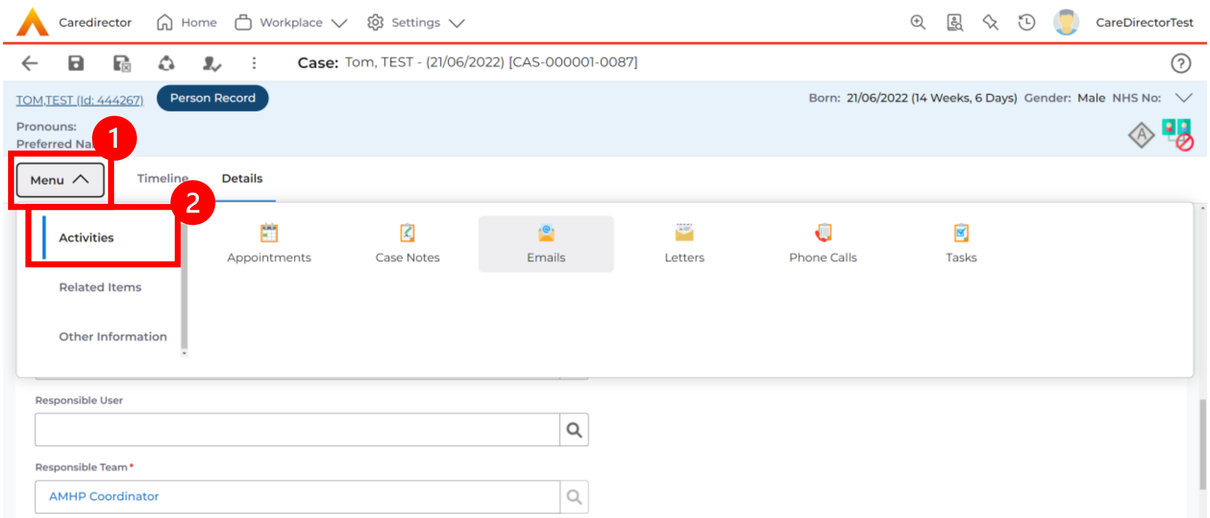


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

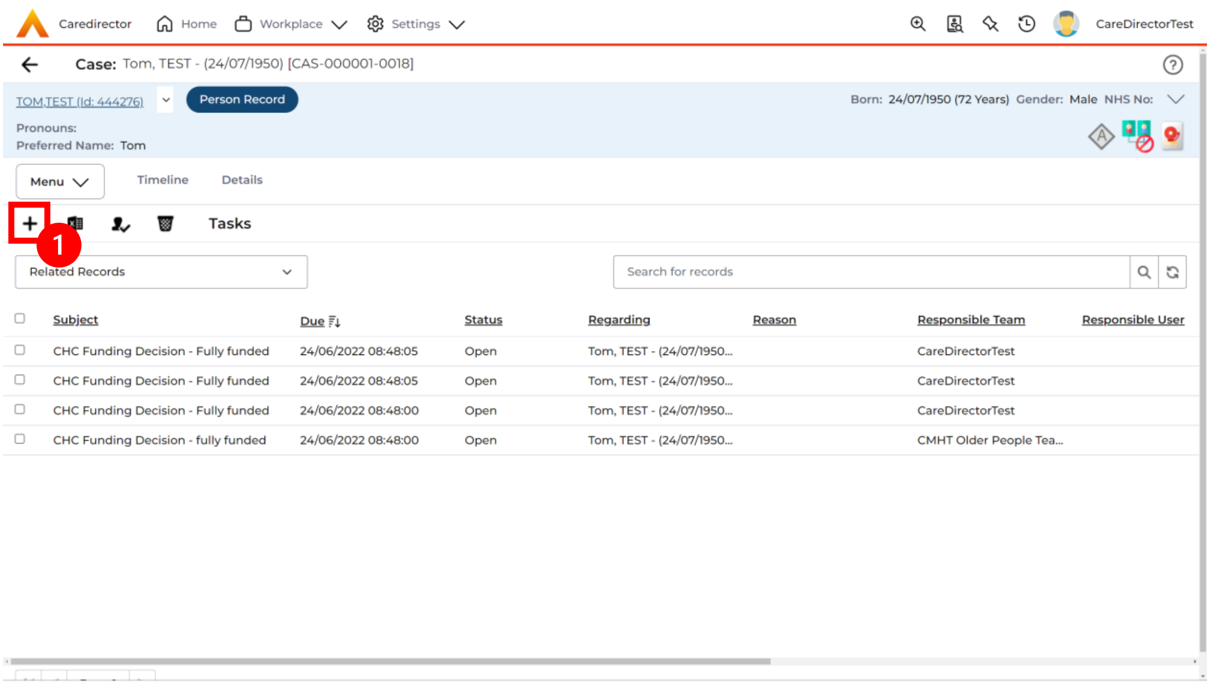


How to input an Activity

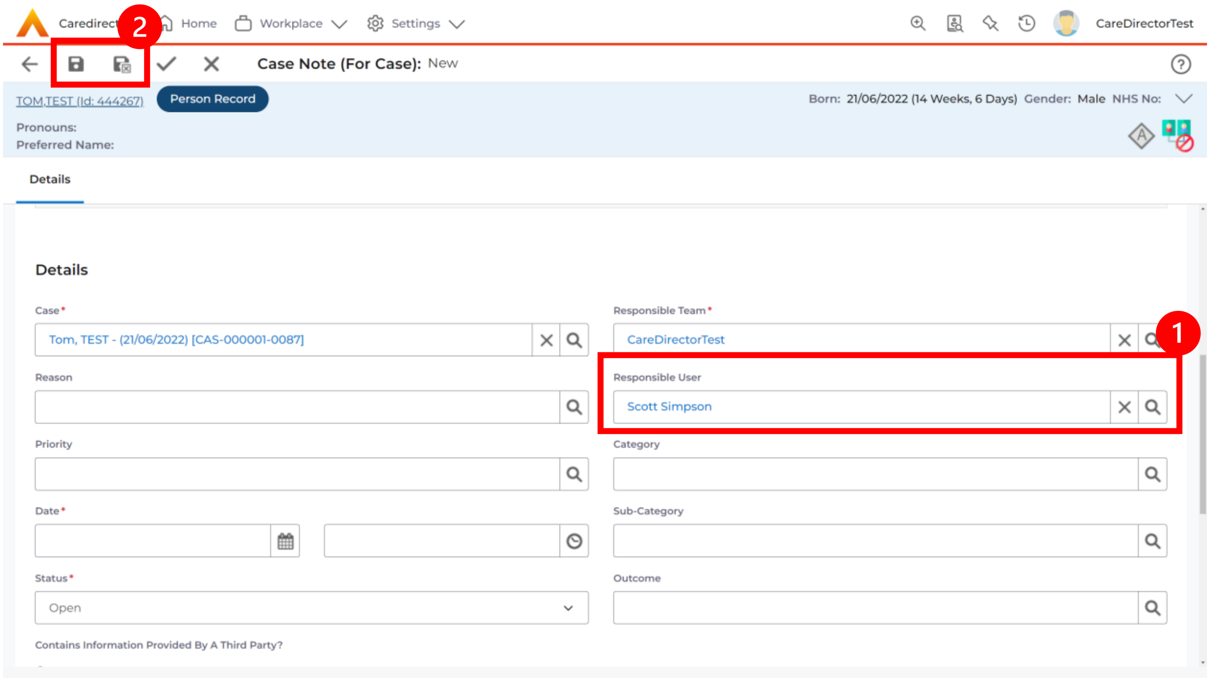
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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



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**.

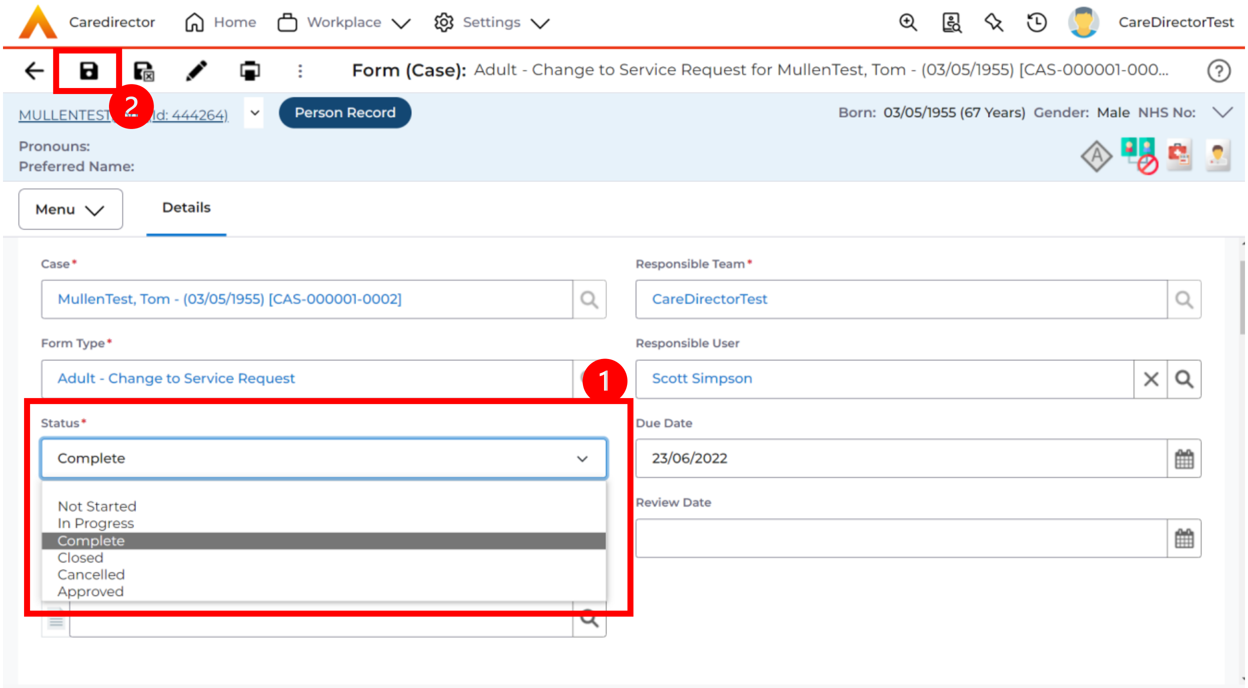


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

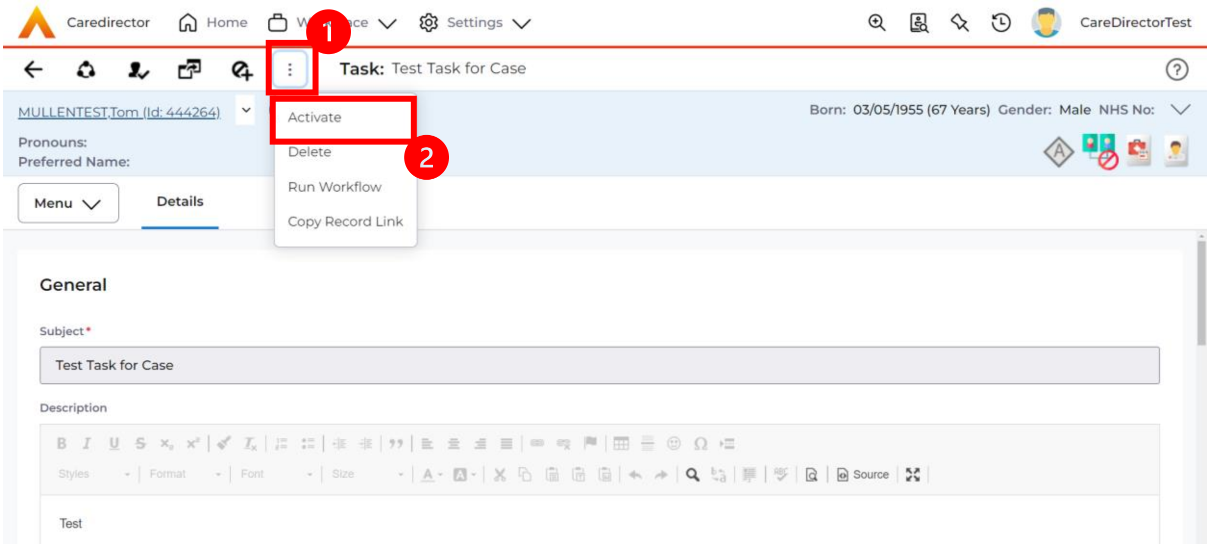
How to change status to Complete (Re-activate Activities)

1. Select the **Form** or **Activity** that requires to be **Completed.** This will send an **Activity** to your **Team Managers** dashboard for them to approve.

2. Under **Status** use the dropdown list to select **Completed.** After select **Save.**

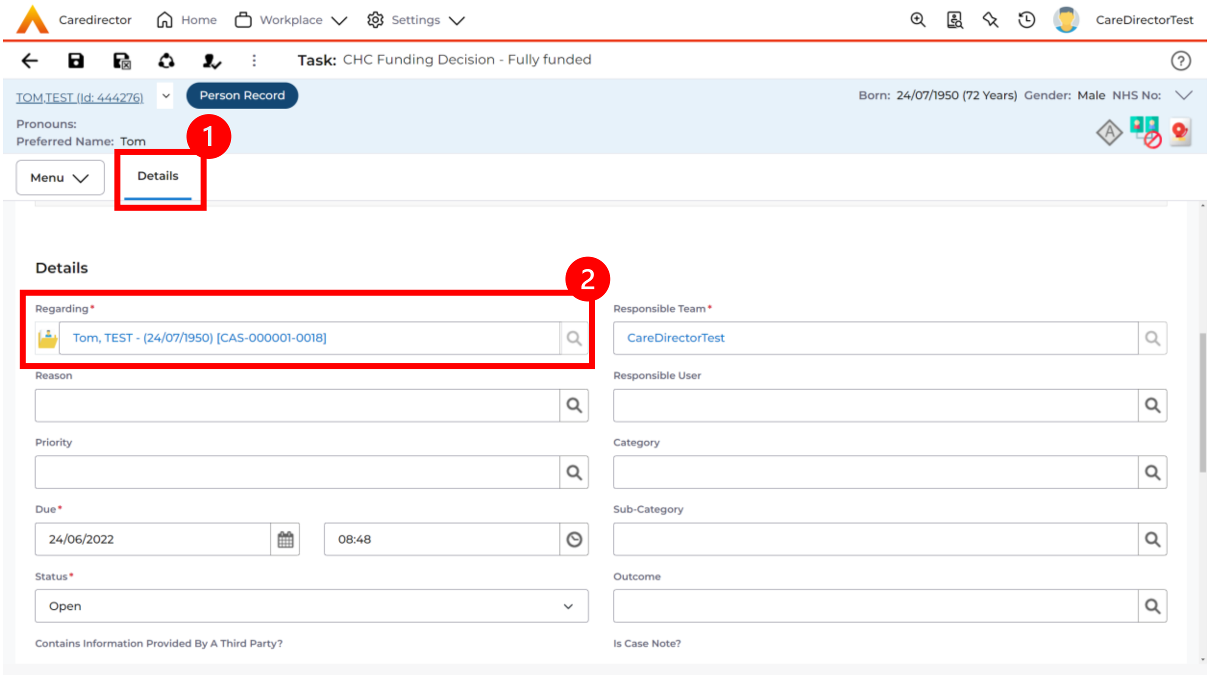


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

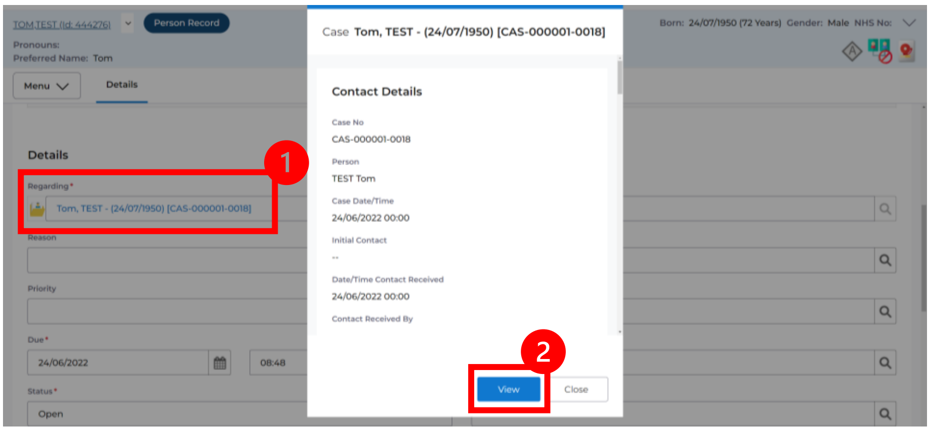
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.

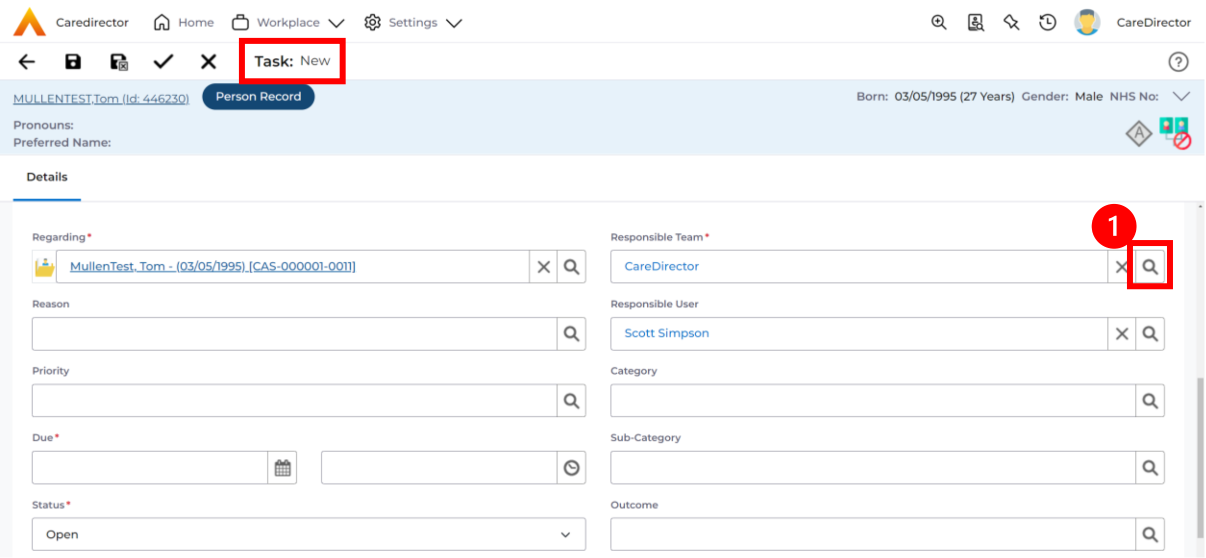
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

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.**

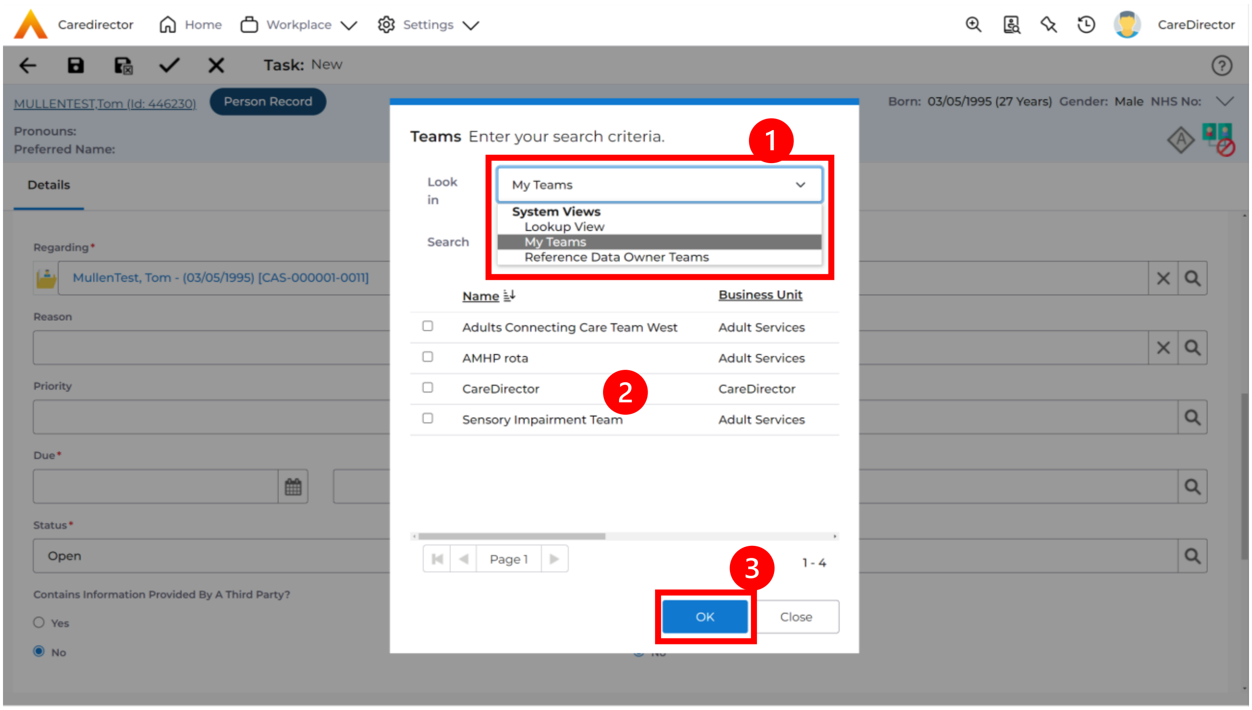


How to Allocate a new Activity to another team

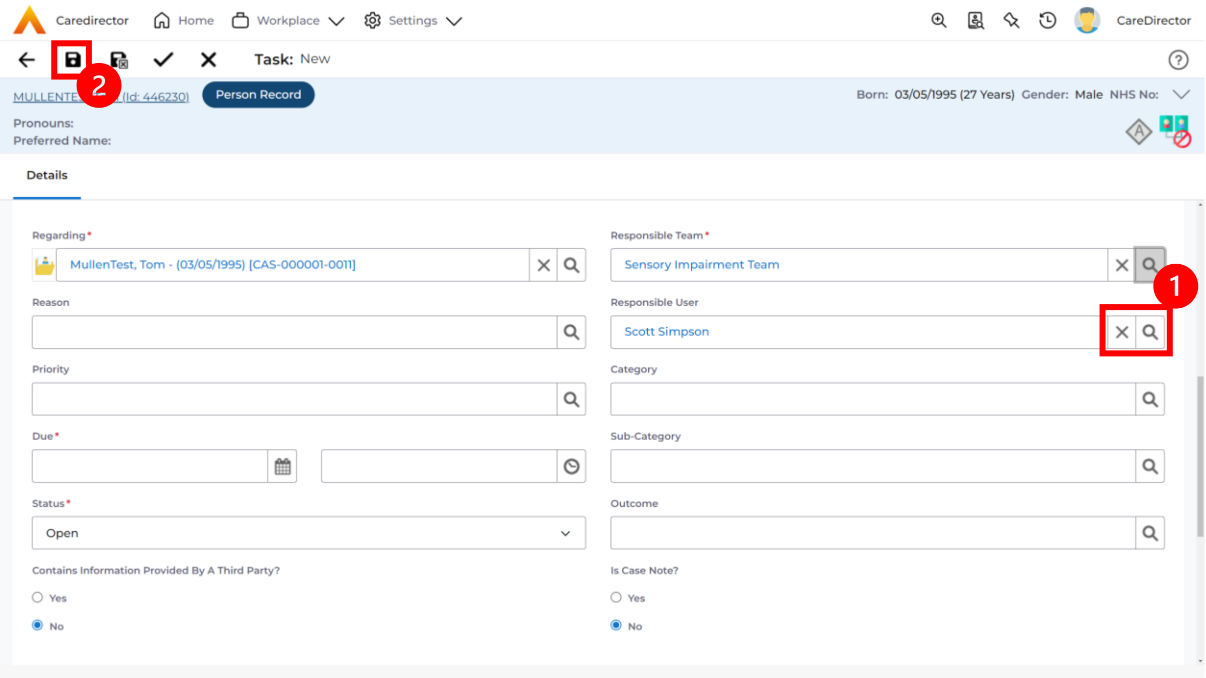
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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.**

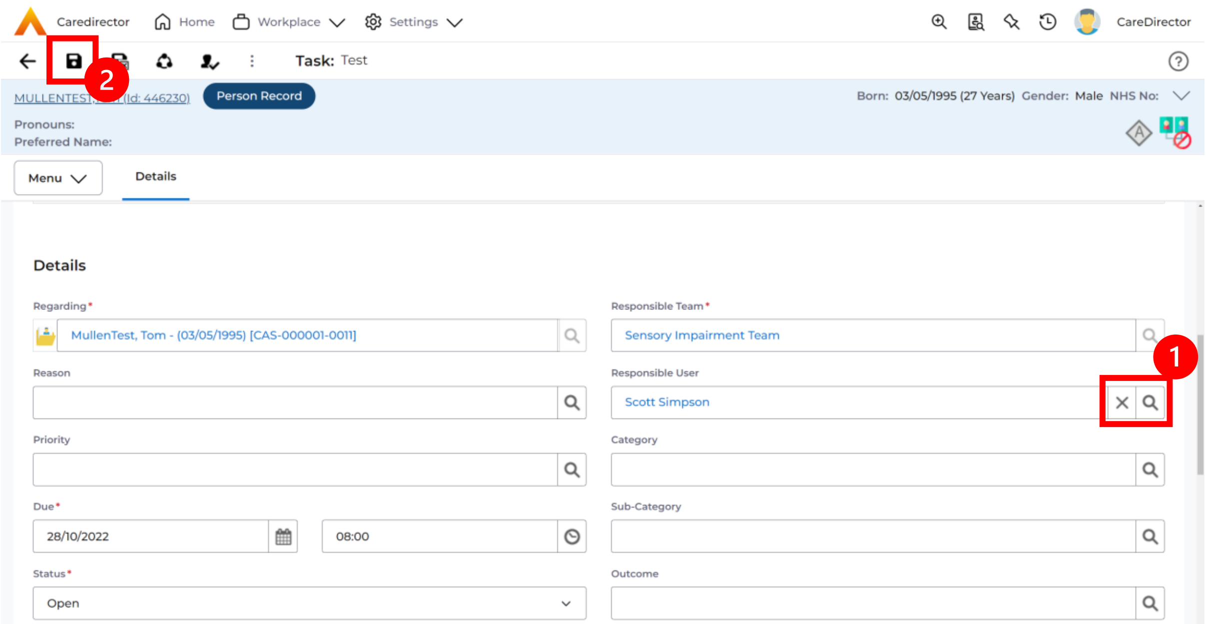


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

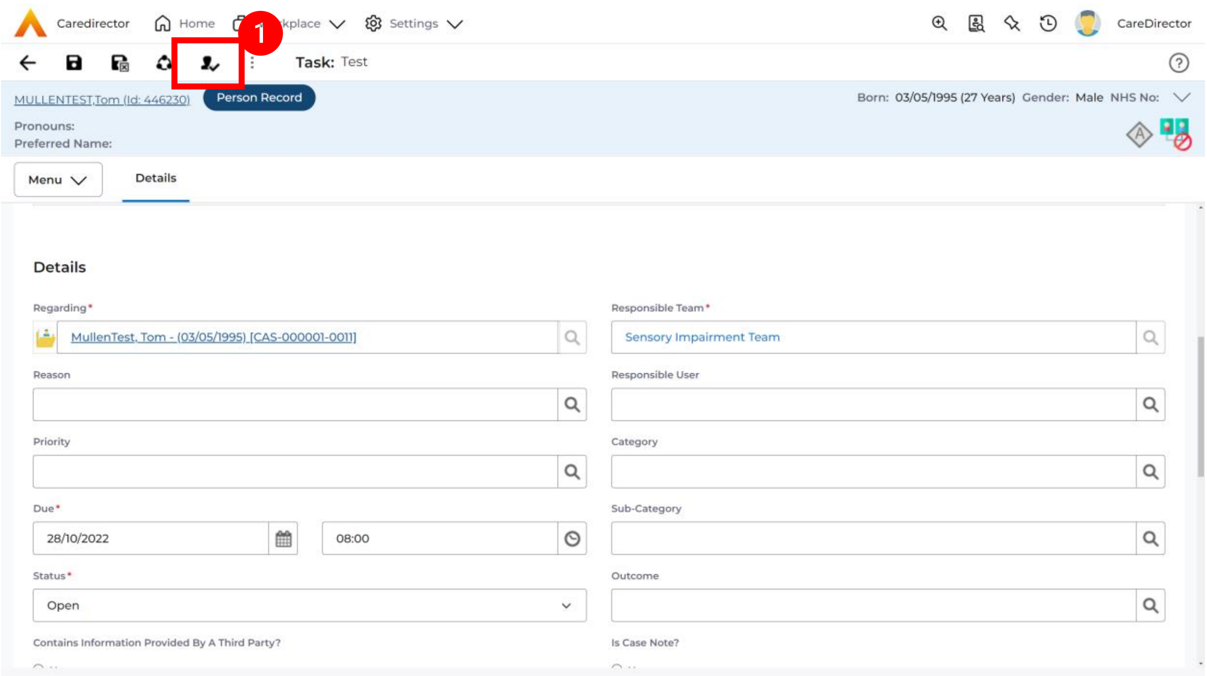


How to Allocate an existing Activity to another team

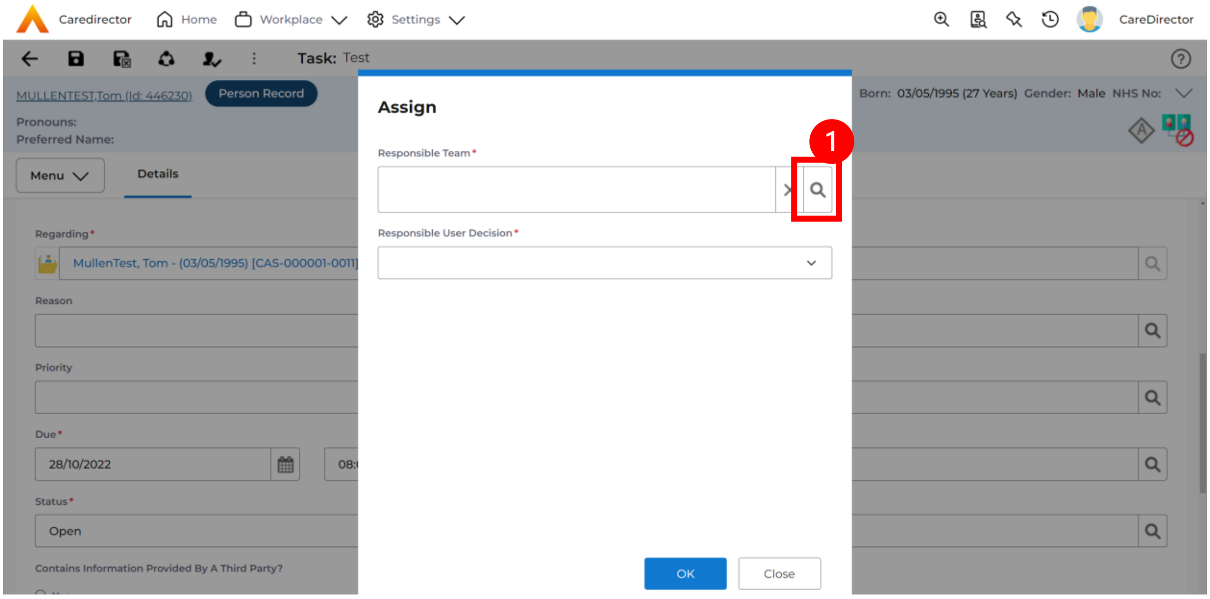
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



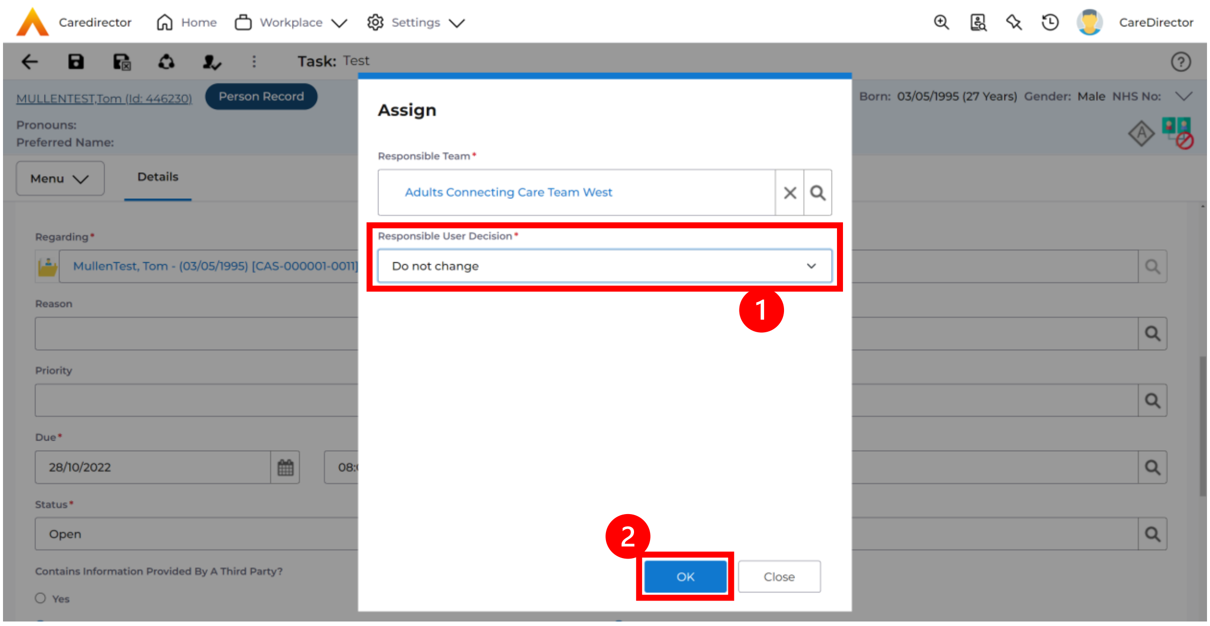
2. Next select **Assign this record to another team** from the toolbar.



3. 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.



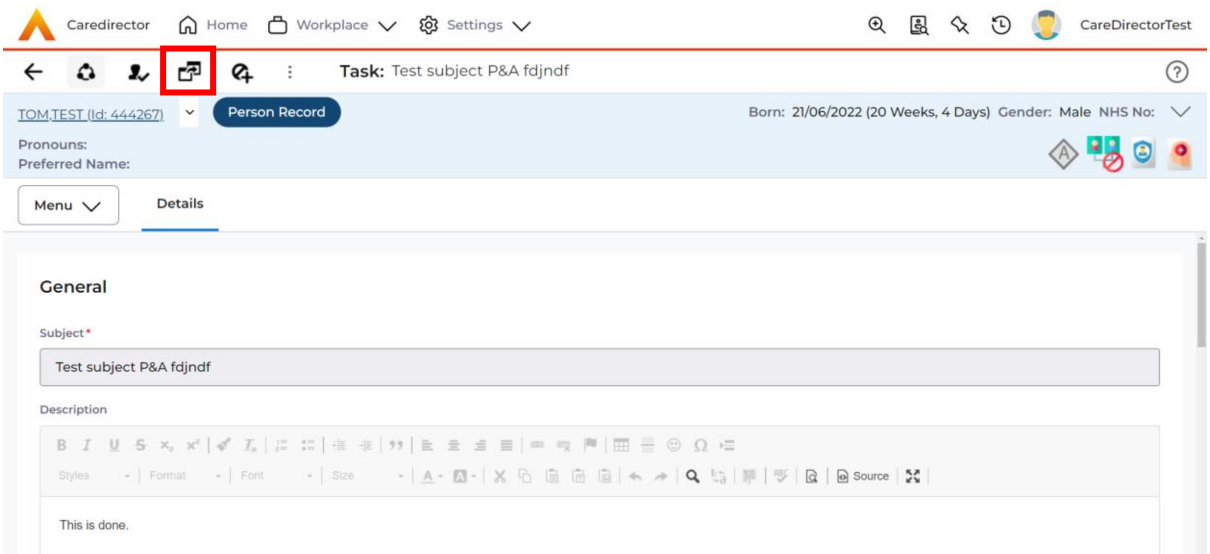
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



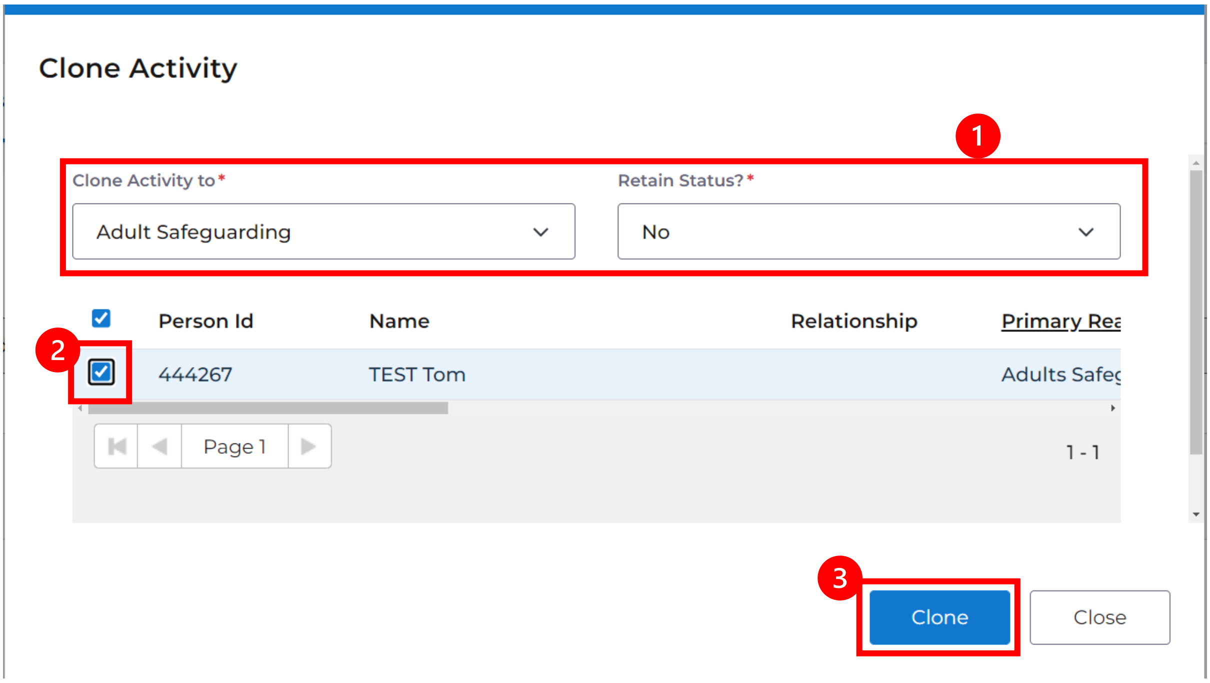
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

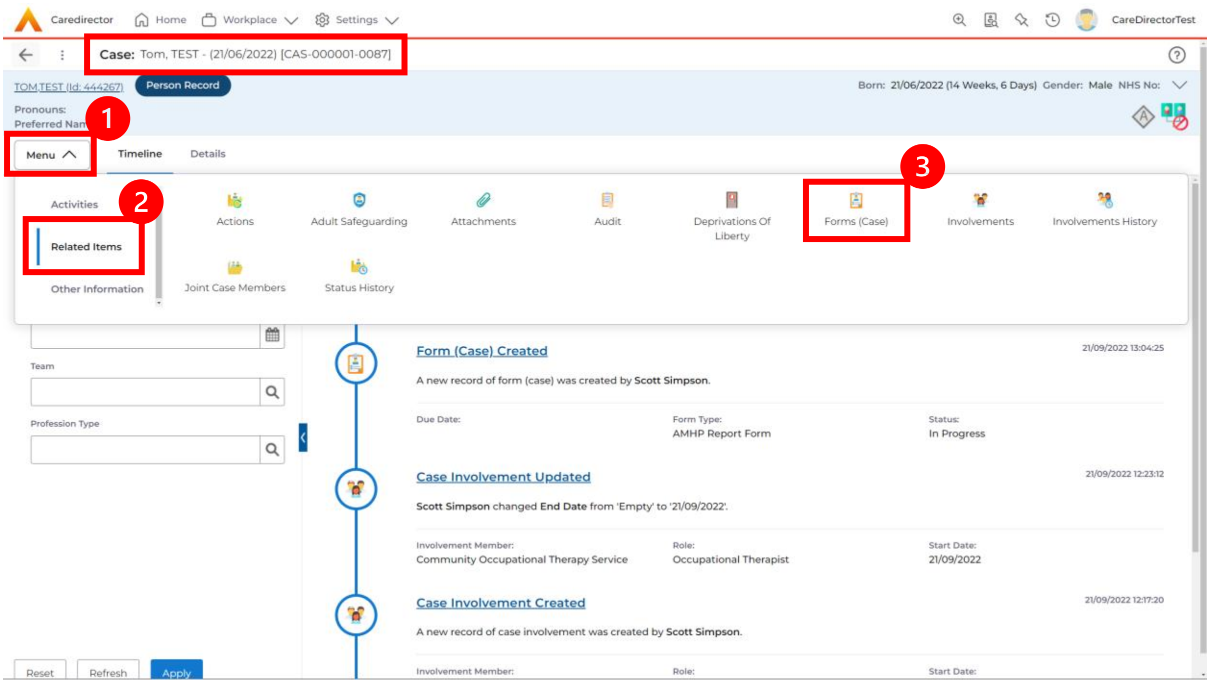


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

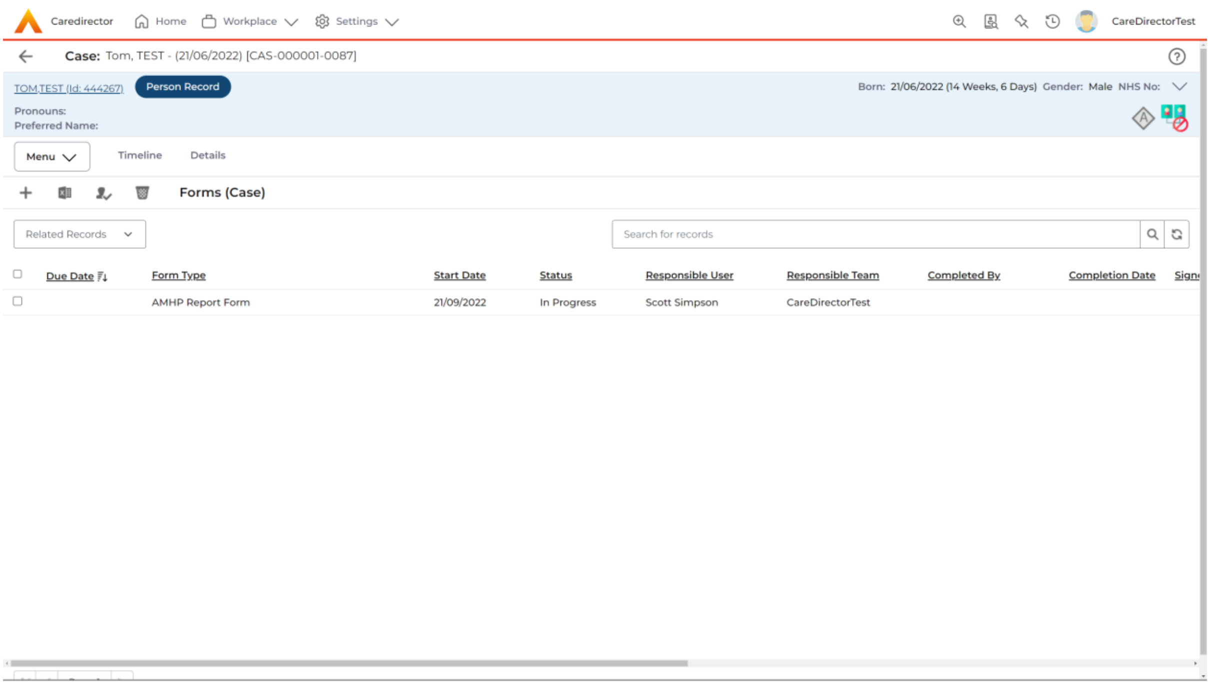


How to find a Form (Case)

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

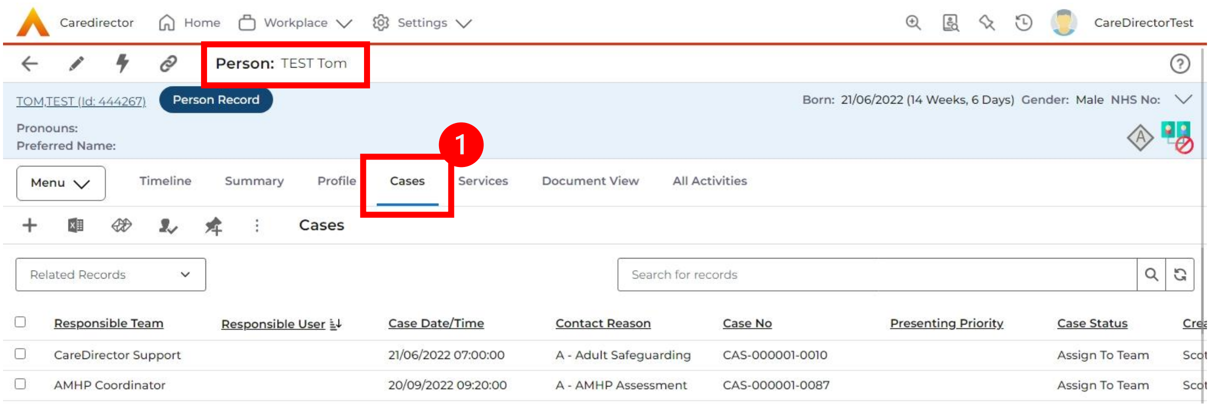


2. Select the relevant for **Form** to open.

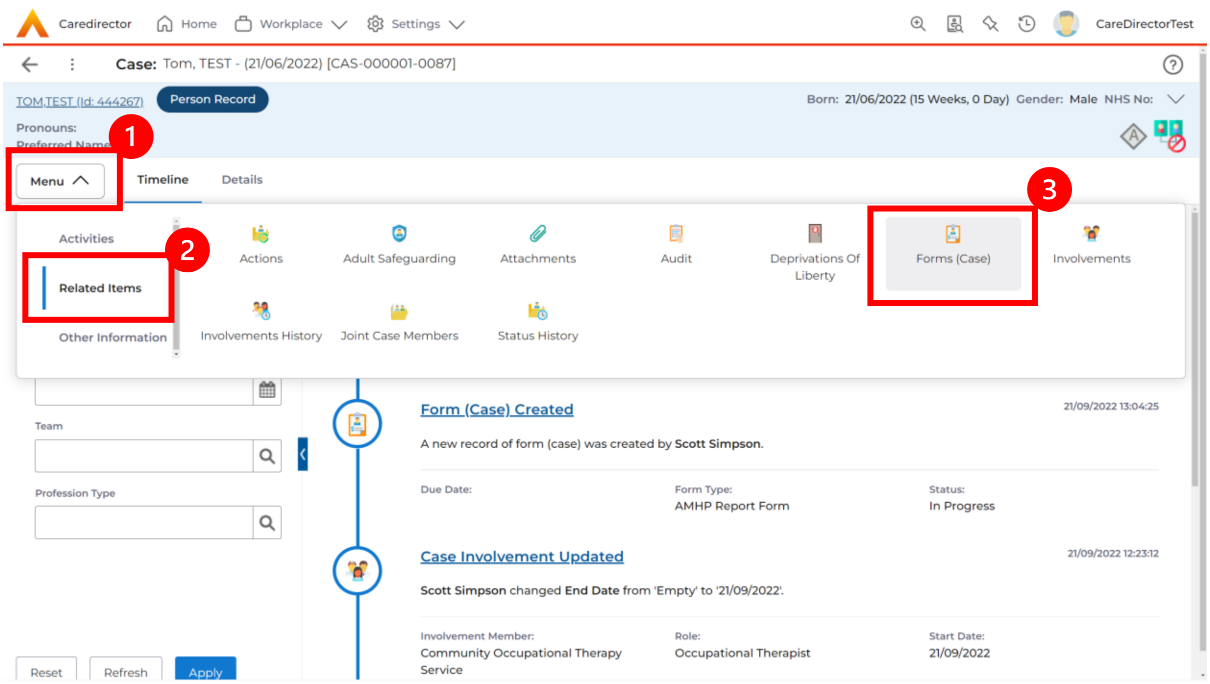


How to add a Form

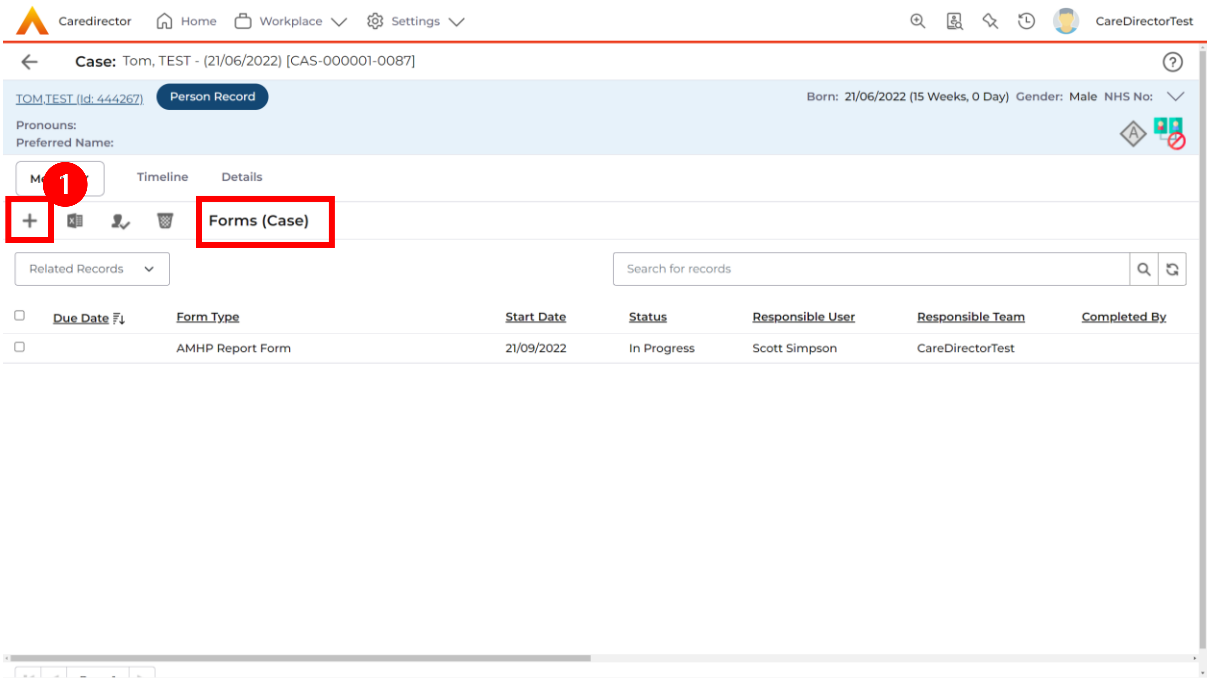
1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**. When found, select it to open the **Case Record**.



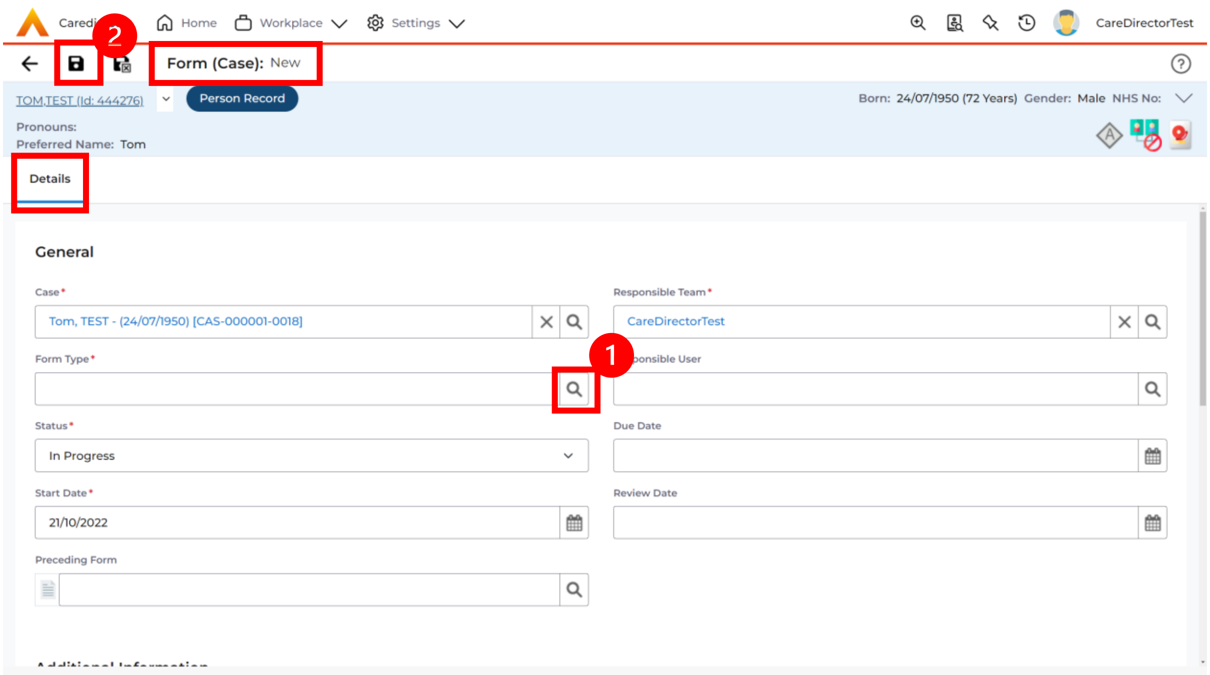
2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case).**



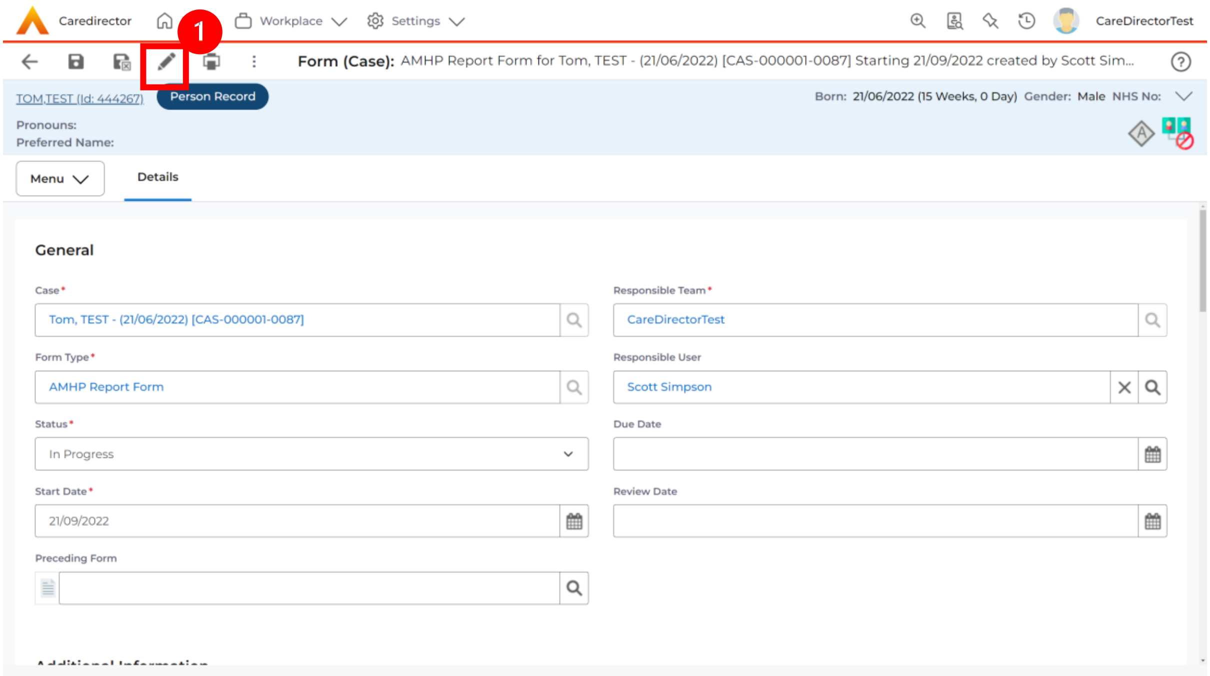
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



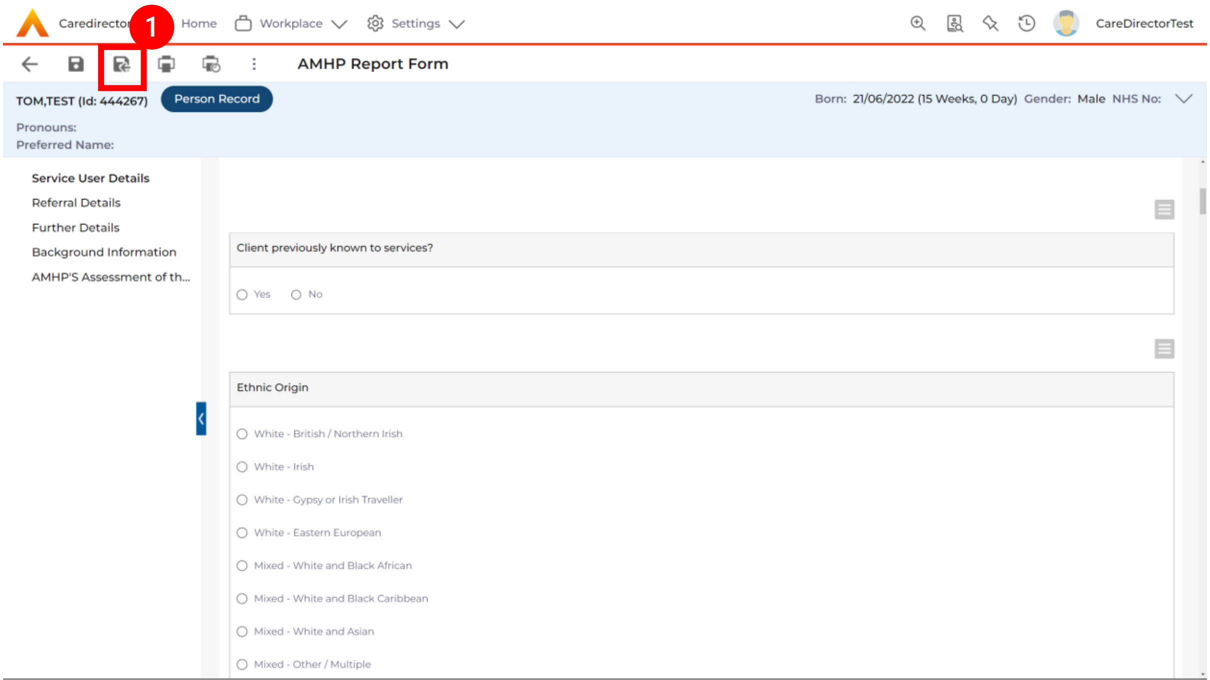
4. Once inside the **Details.** This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type.** When finished, select **Save.**



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.

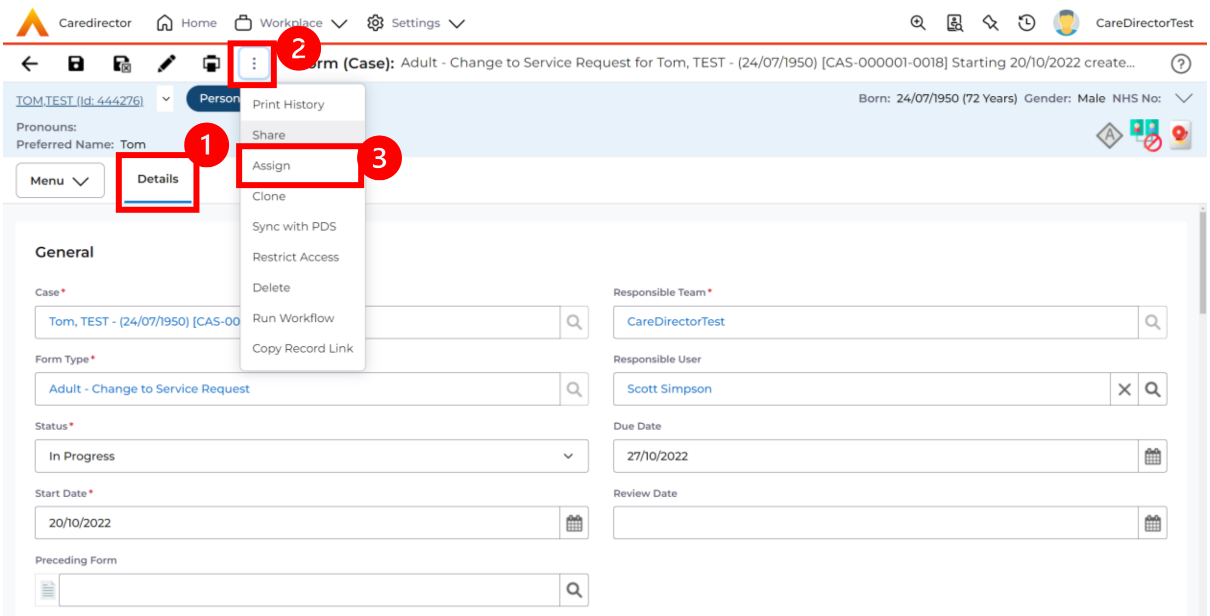


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

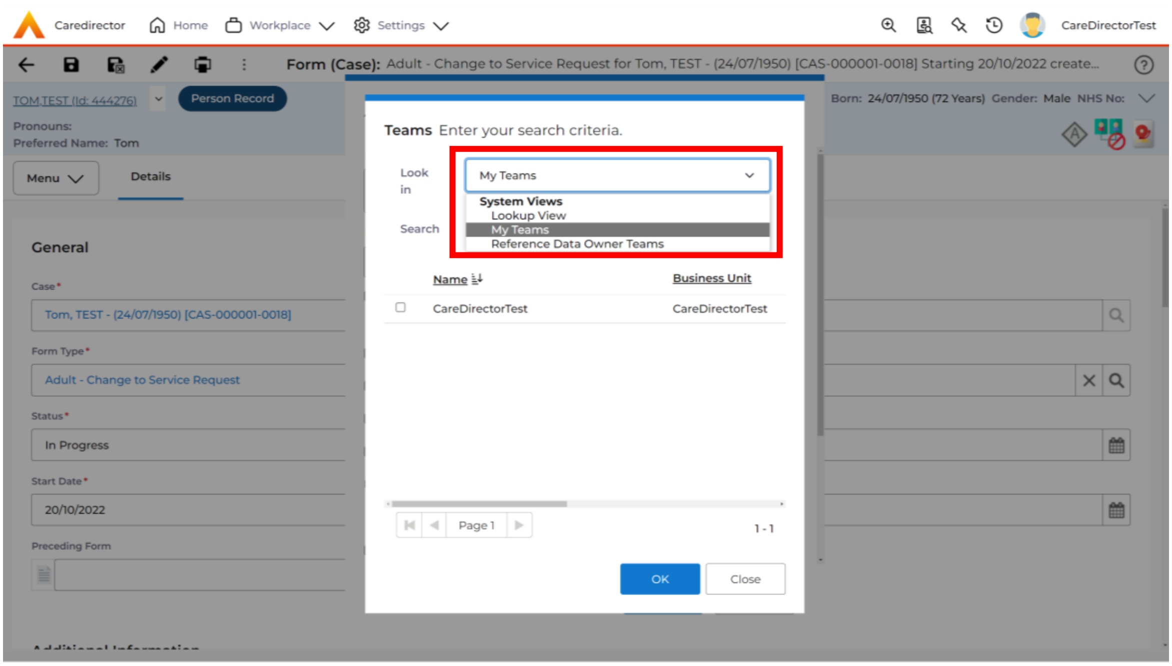


How to Allocate a Form

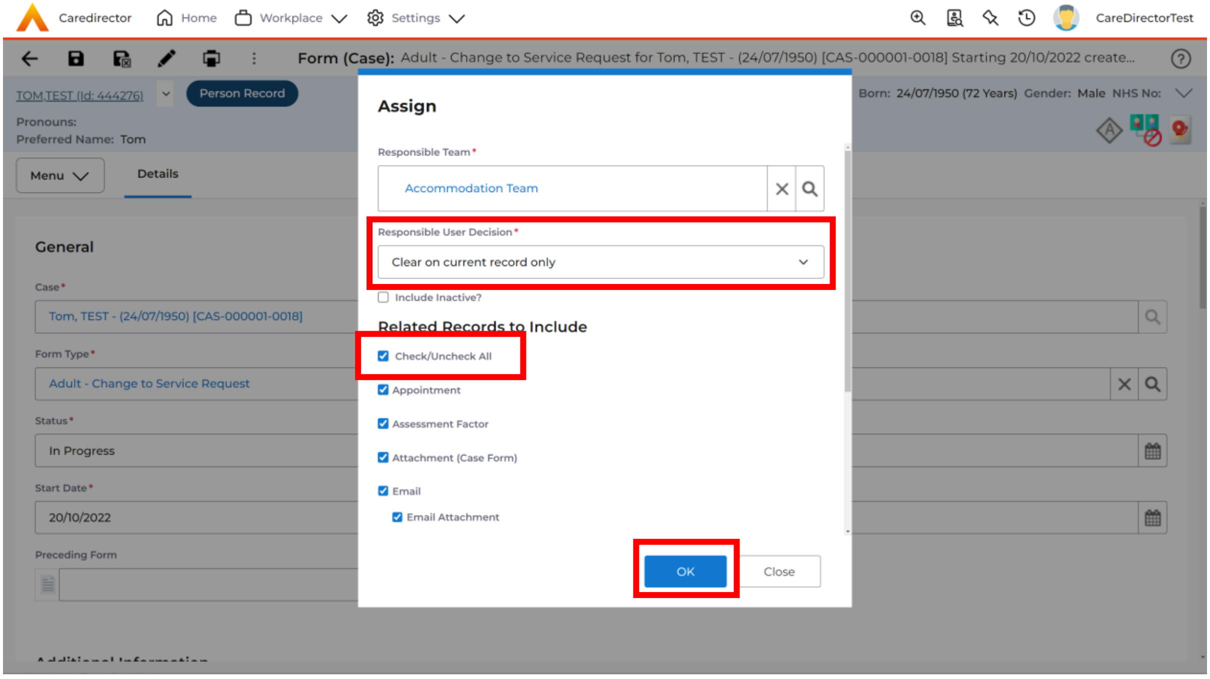
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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.

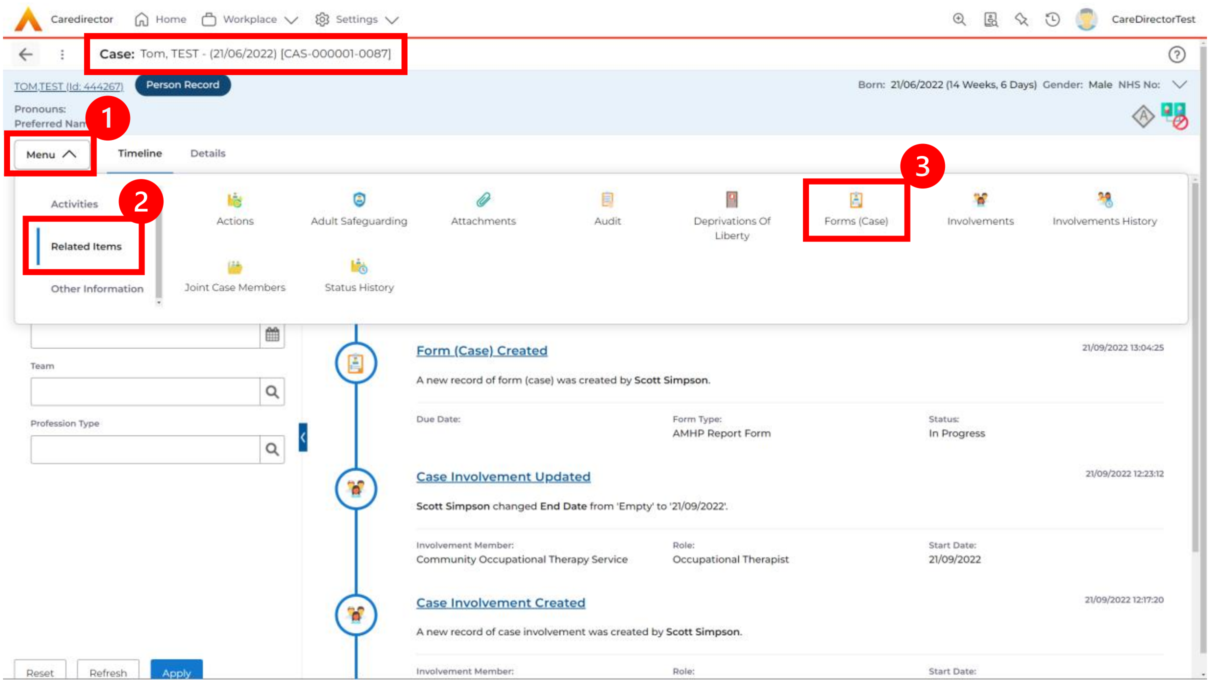


3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

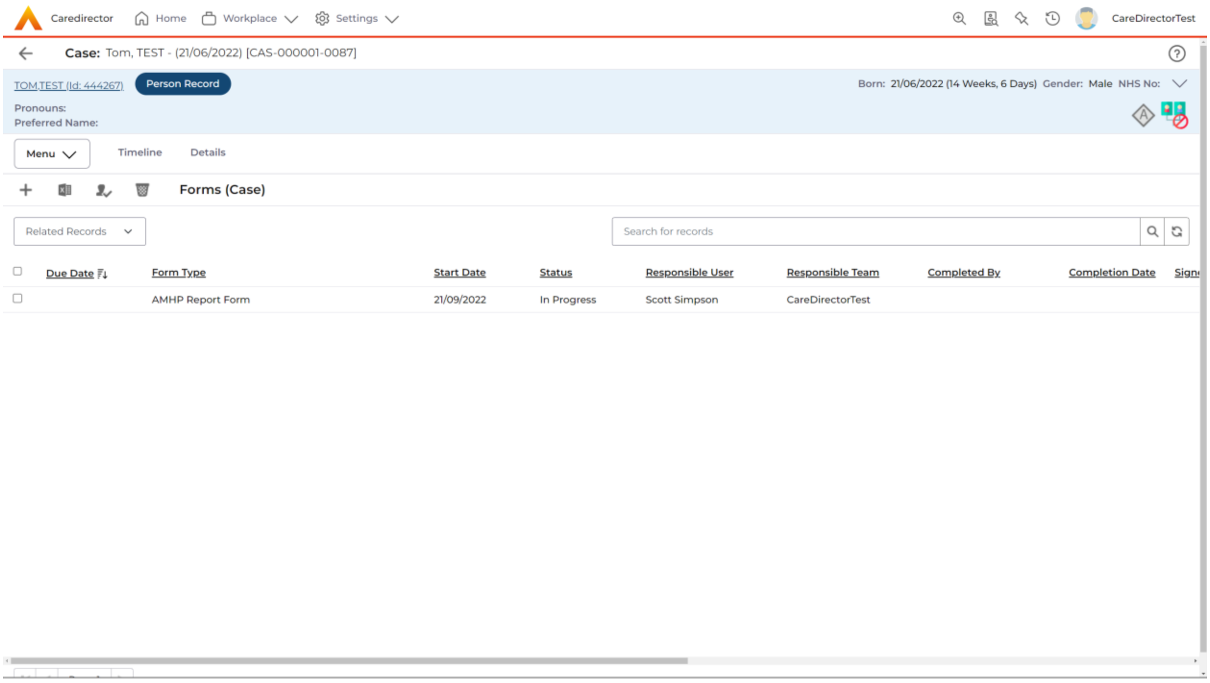


How to Clone a Form

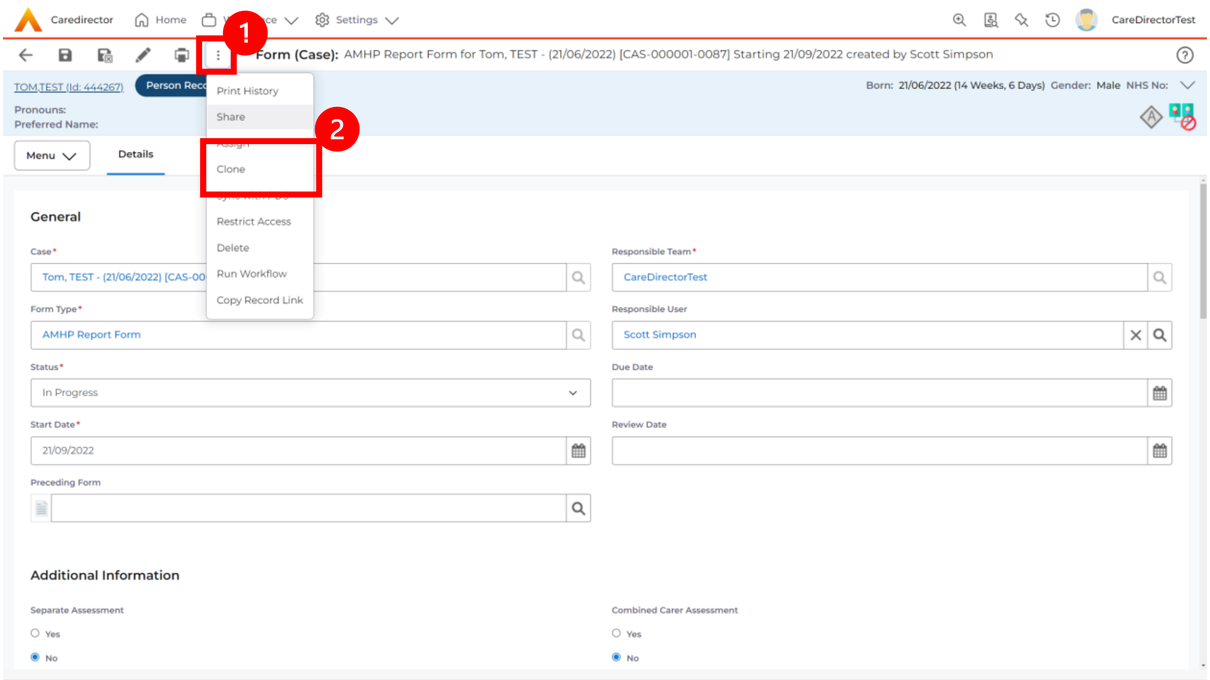
1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case).**



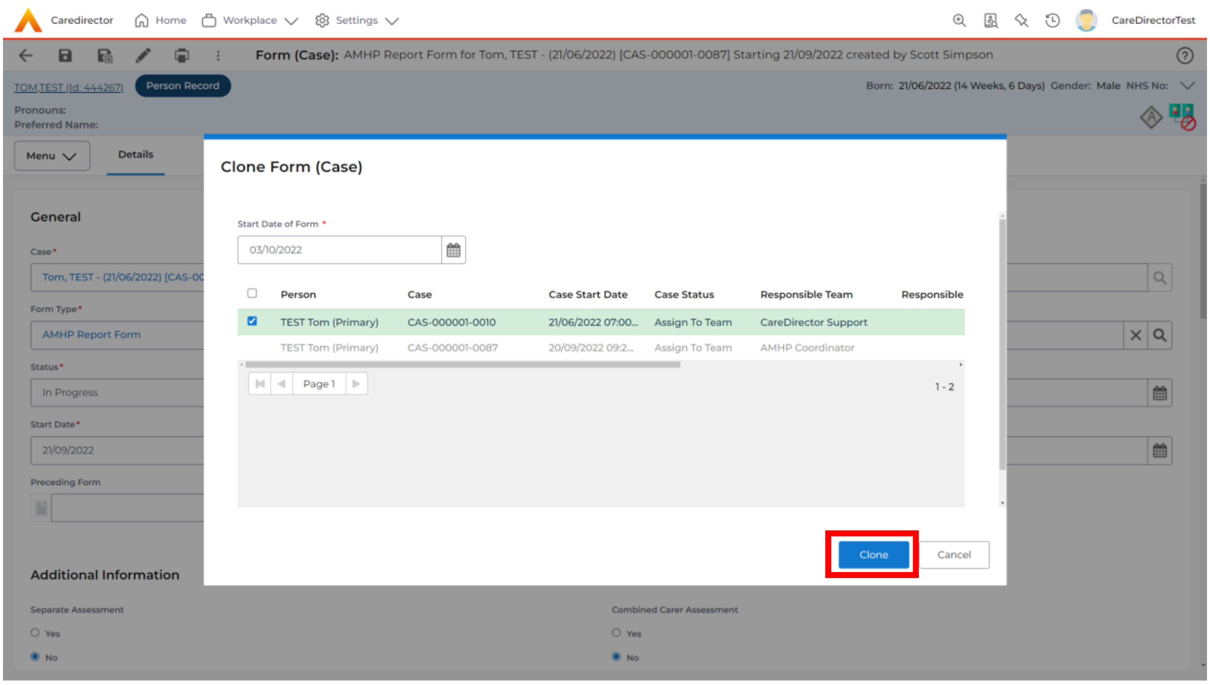
2. Select the relevant for **Form** to open.



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

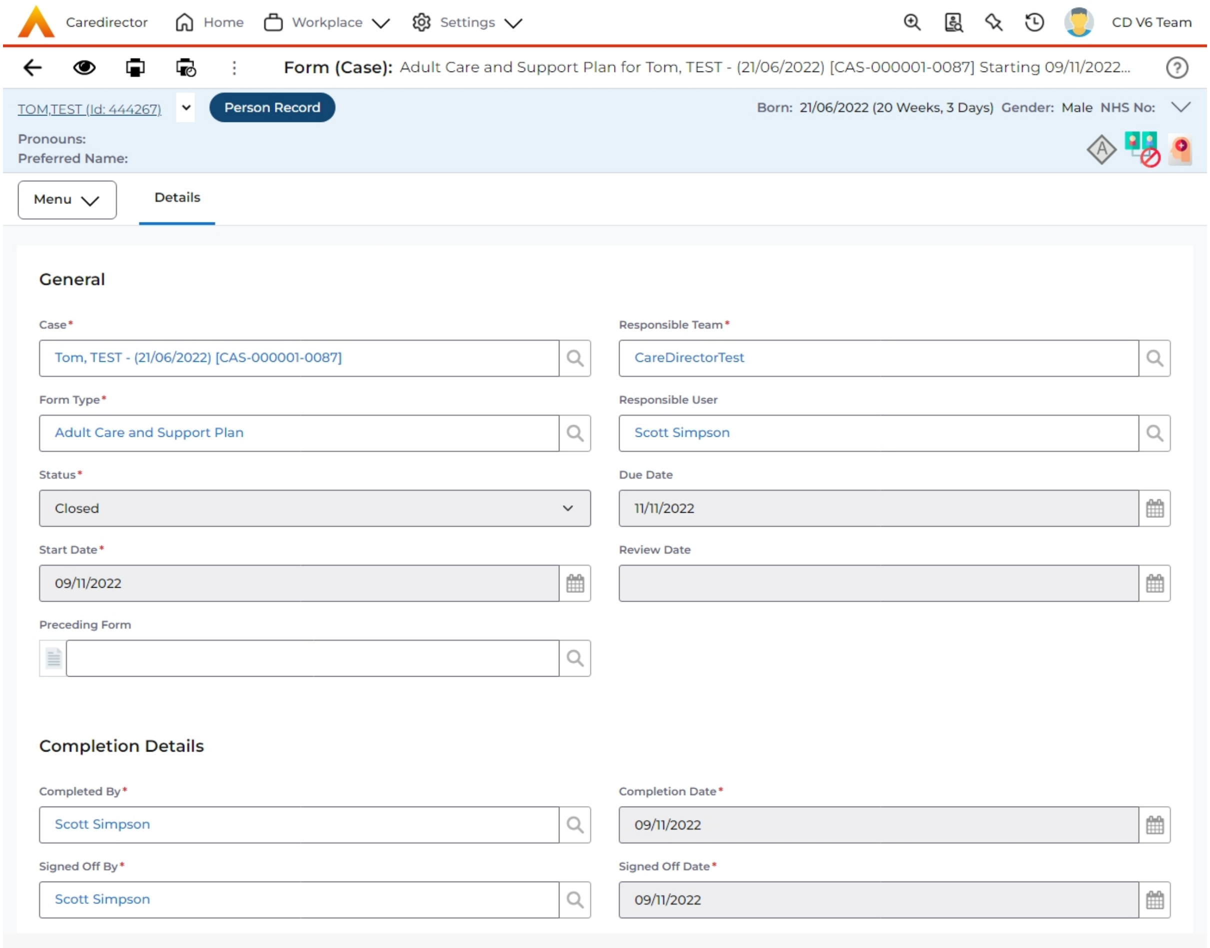


4. It will open a new window. Enter the **Start Date of Form.** Select which **Case** you would like this **Form** to be **Cloned** to. When check boxed, select **Clone.**



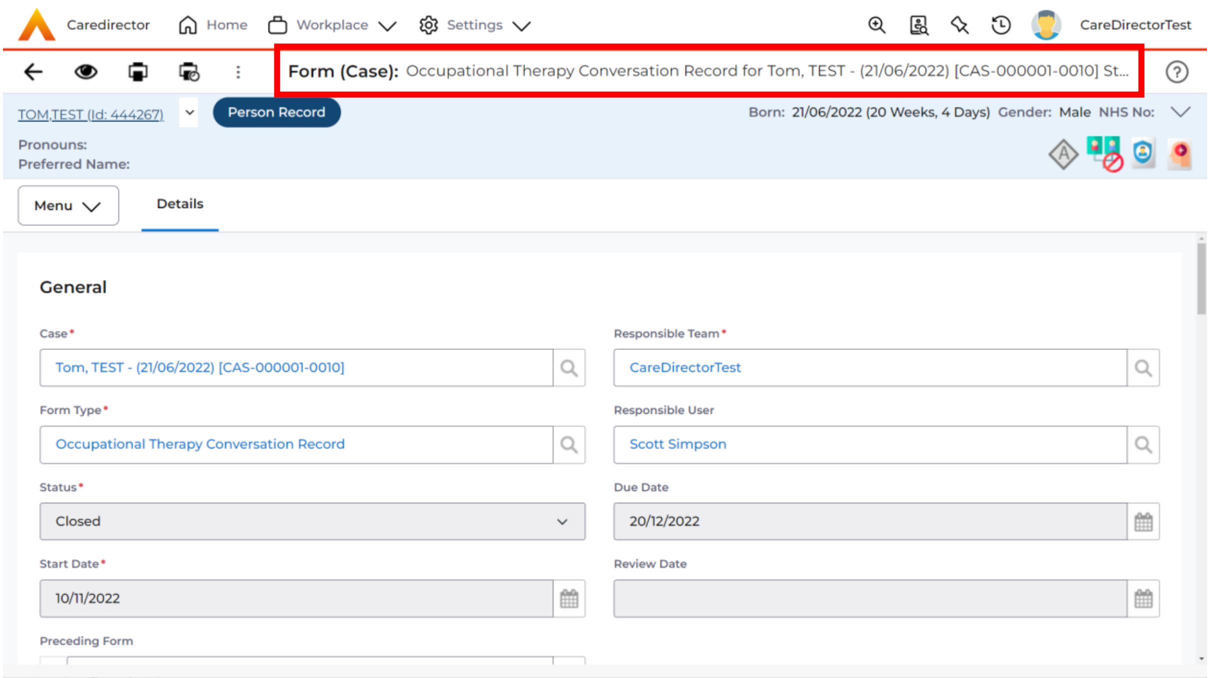
5. You do not need to **Save** this.

6. 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**.

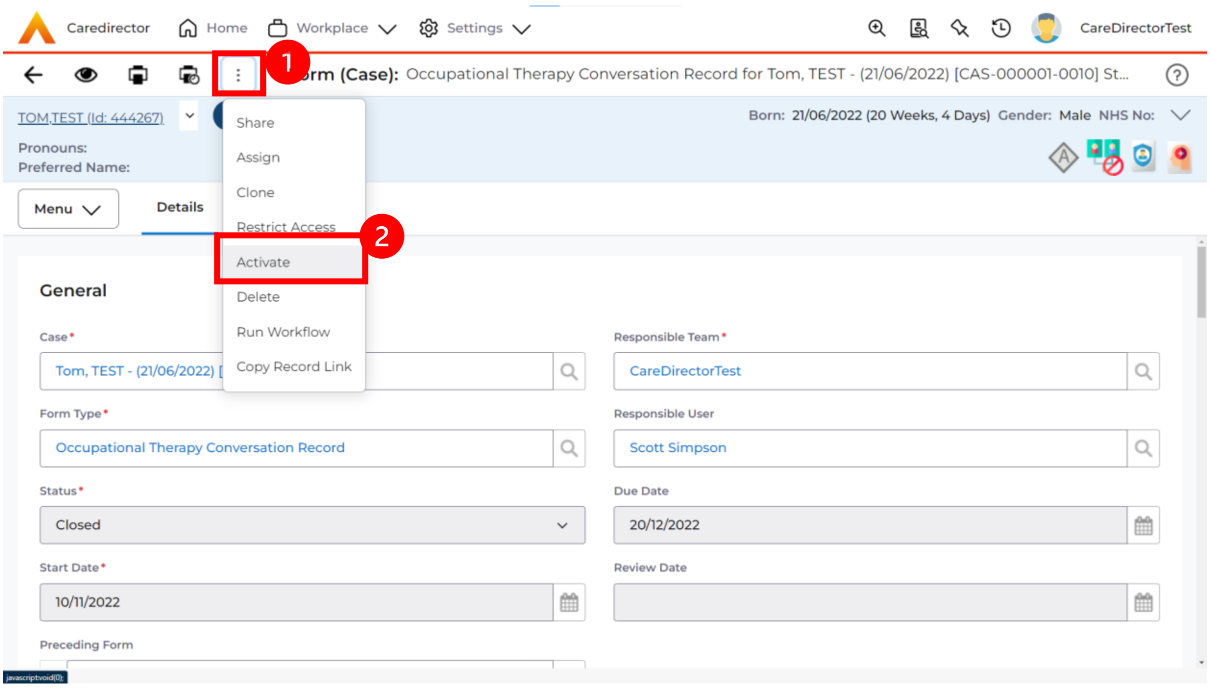


How to reactivate a Closed Form

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

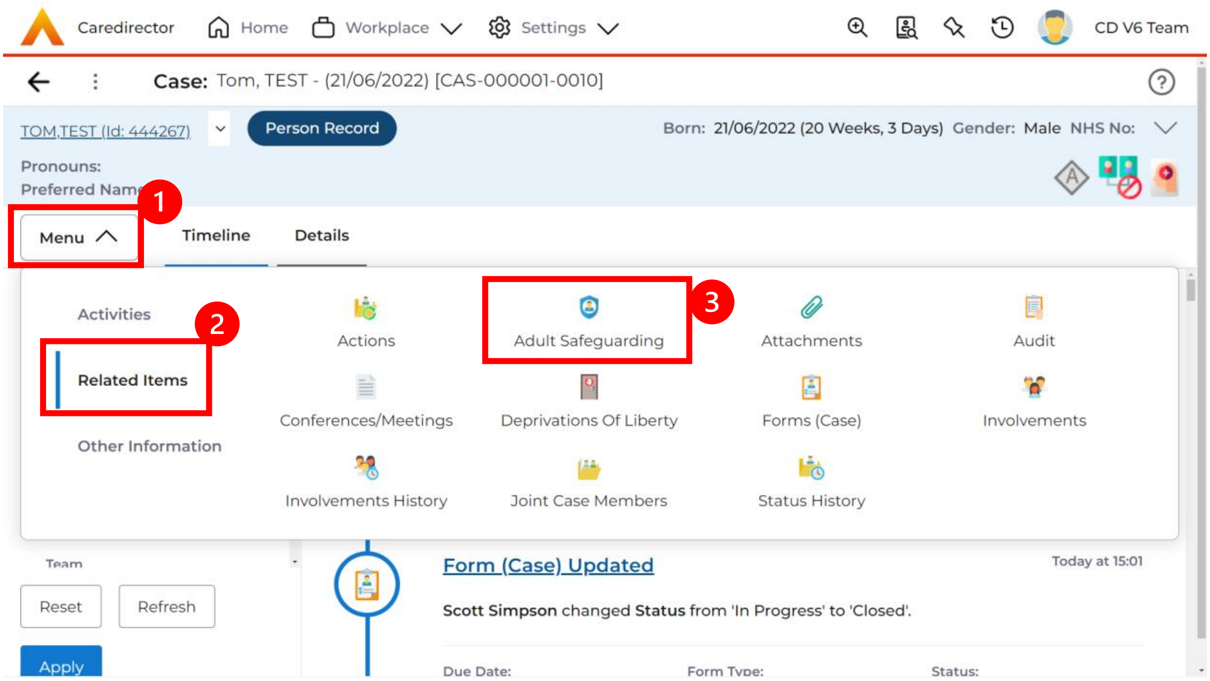


2. Select the **Three Dots** and select **Activate.**



How to find an Adult Safeguarding Module

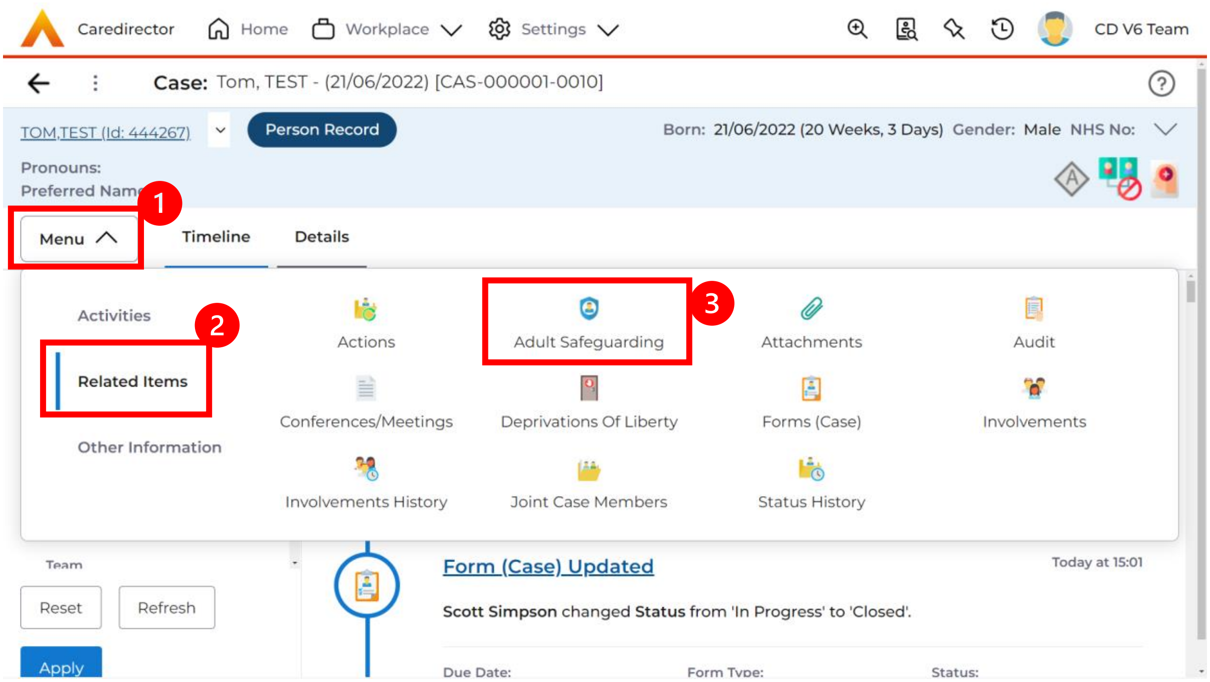
1. Locate the **Case** the **Adult Safeguarding Module** is on. Then select **Menu, Related Items** and **Adults Safeguarding.**



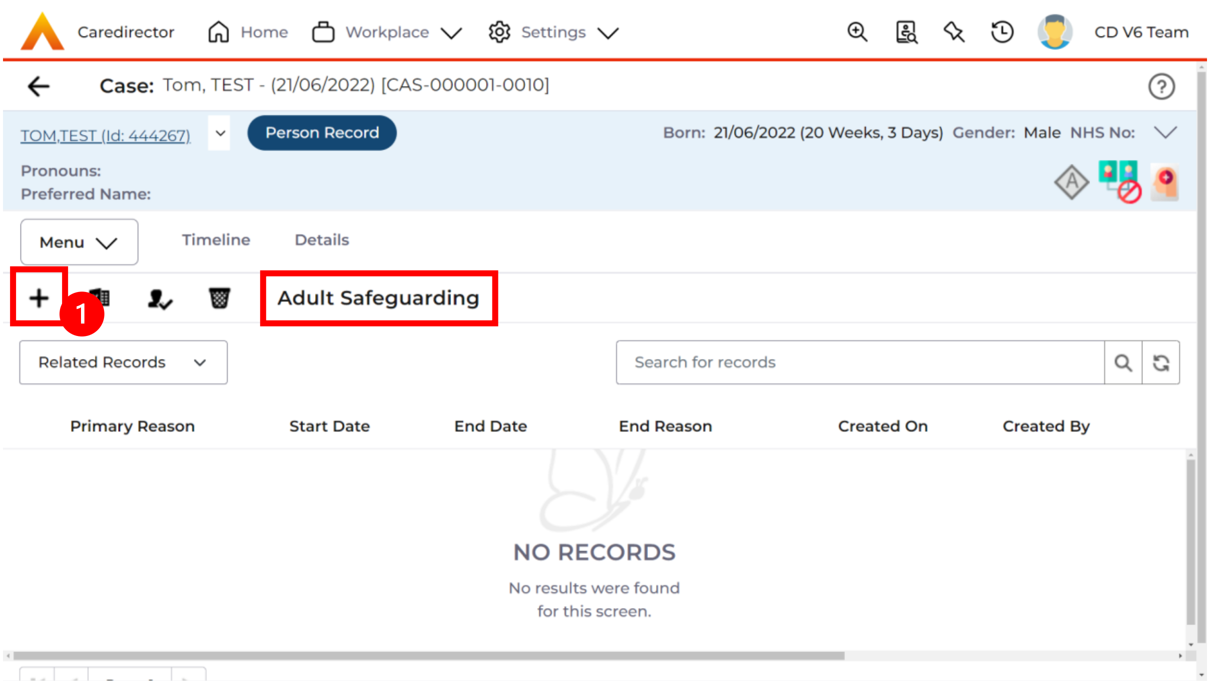
2. Select from the list the **Adult Safeguarding Module** you would like to view.

How to create an Adult Safeguarding Module

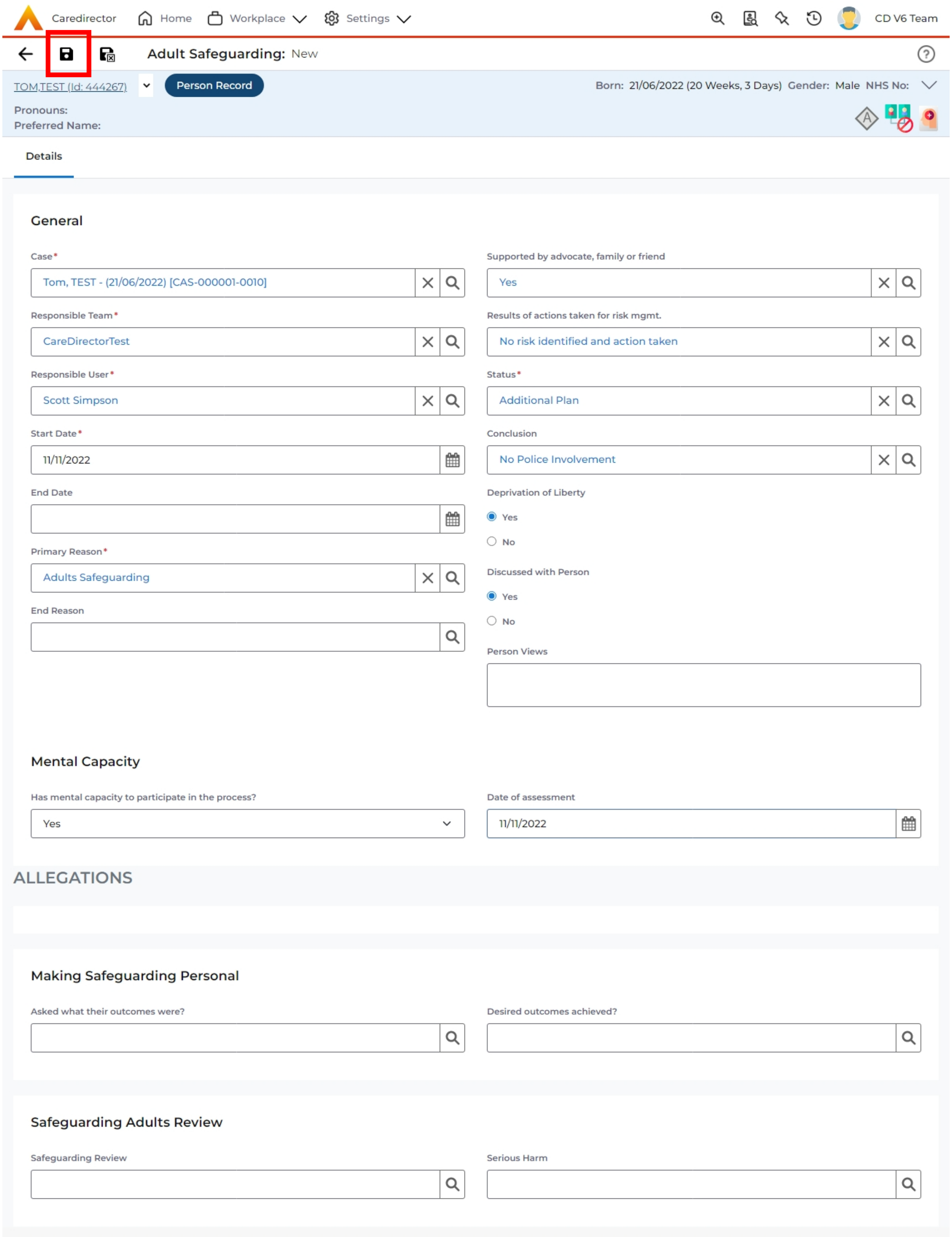
1. Locate the **Case** the **Adult Safeguarding Module** is on. Then select **Menu, Related Items** and **Adults Safeguarding.**



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

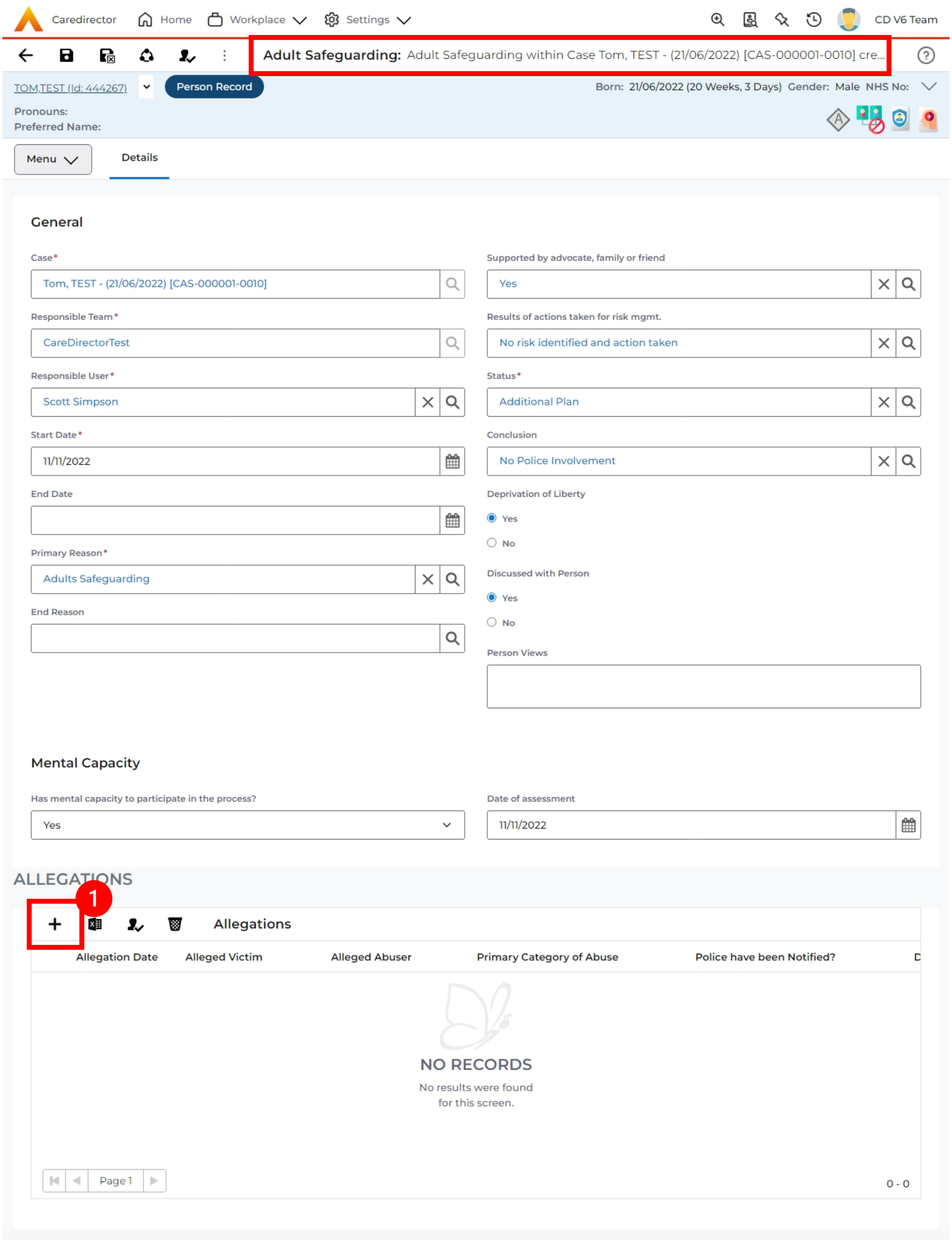


3. Fill in the required fields and enter as much information as you know. When finished select **Save**.

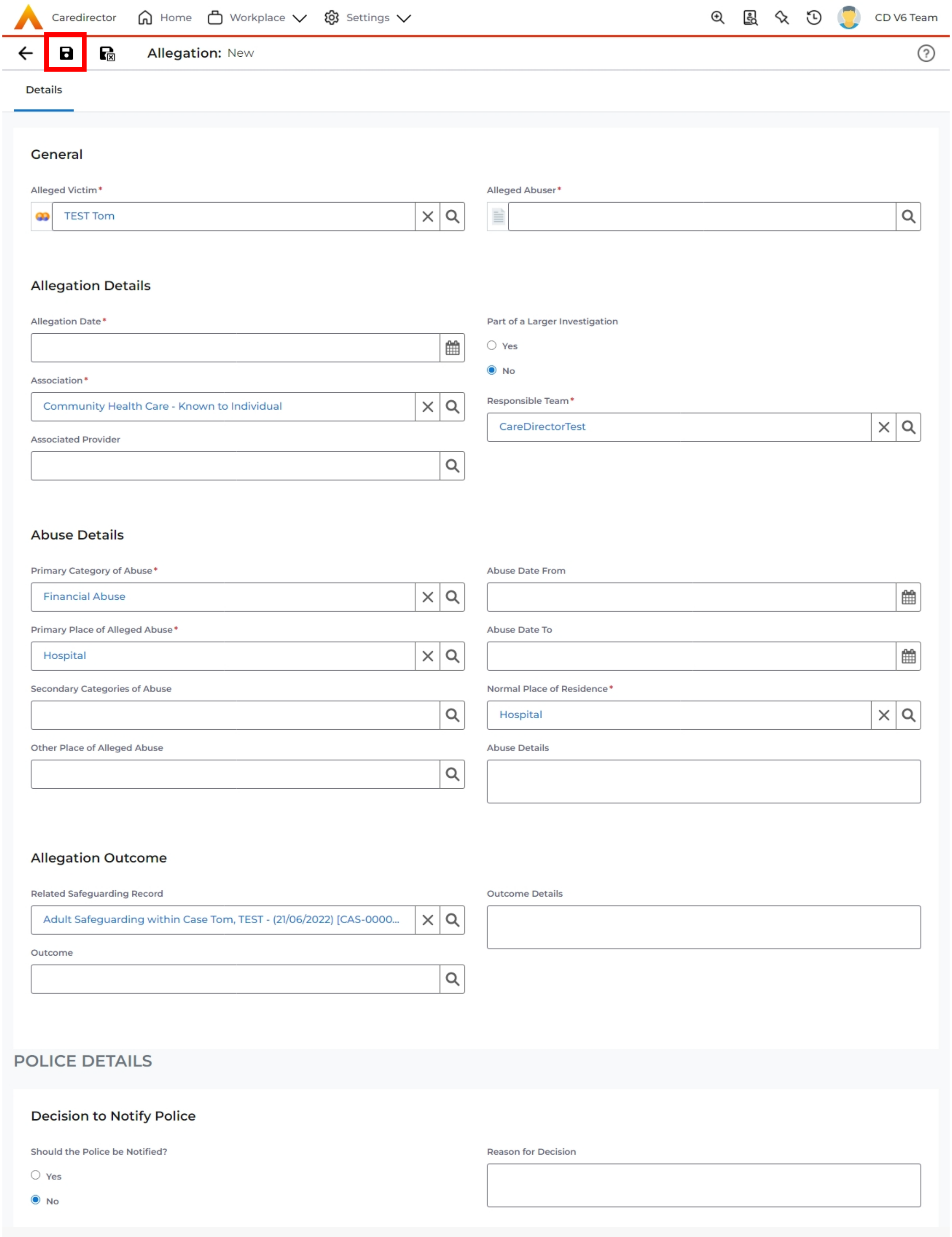


How to input Allegations for an Adult Safeguarding Module

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



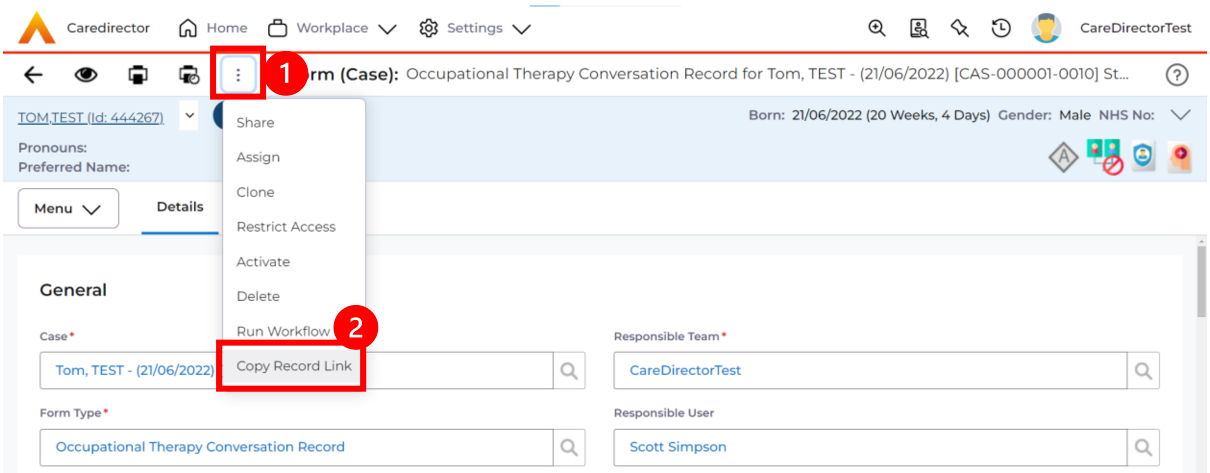
2. Enter in the details and when finished select **Save.**



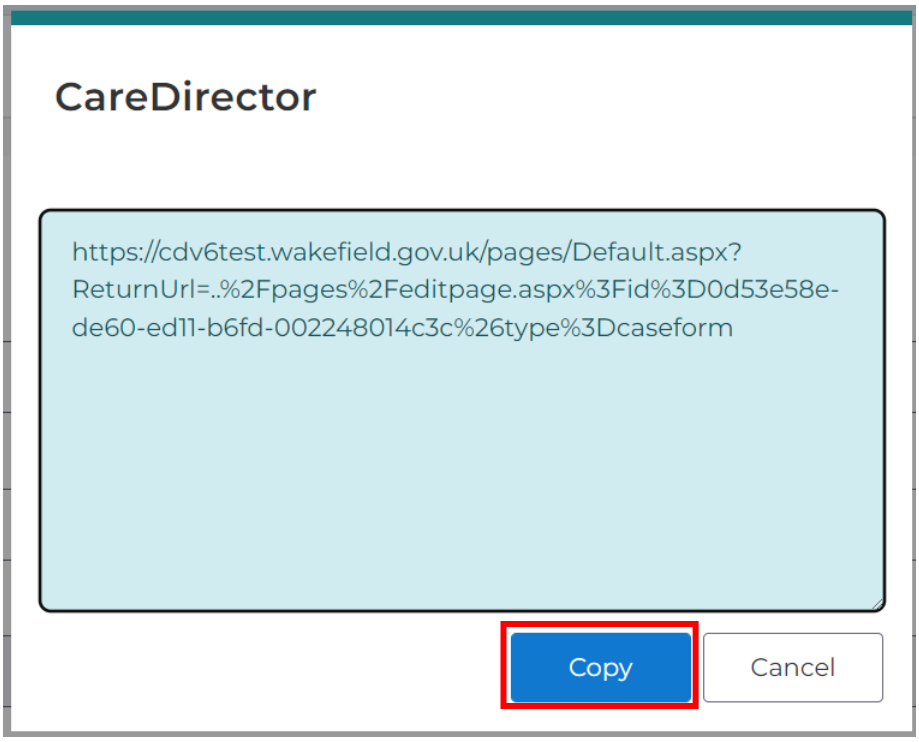
How to Copy Record Link

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.



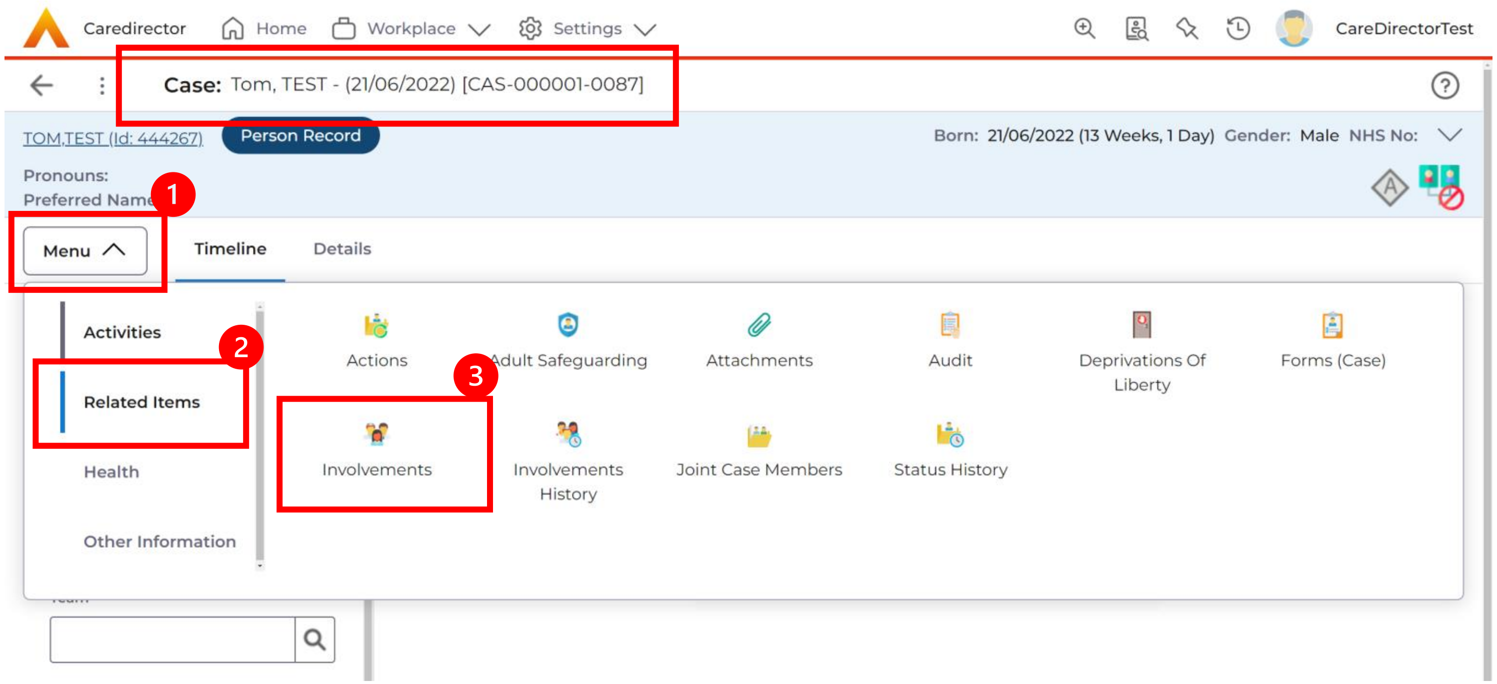
How to close a Case

Ending Secondary Involvements

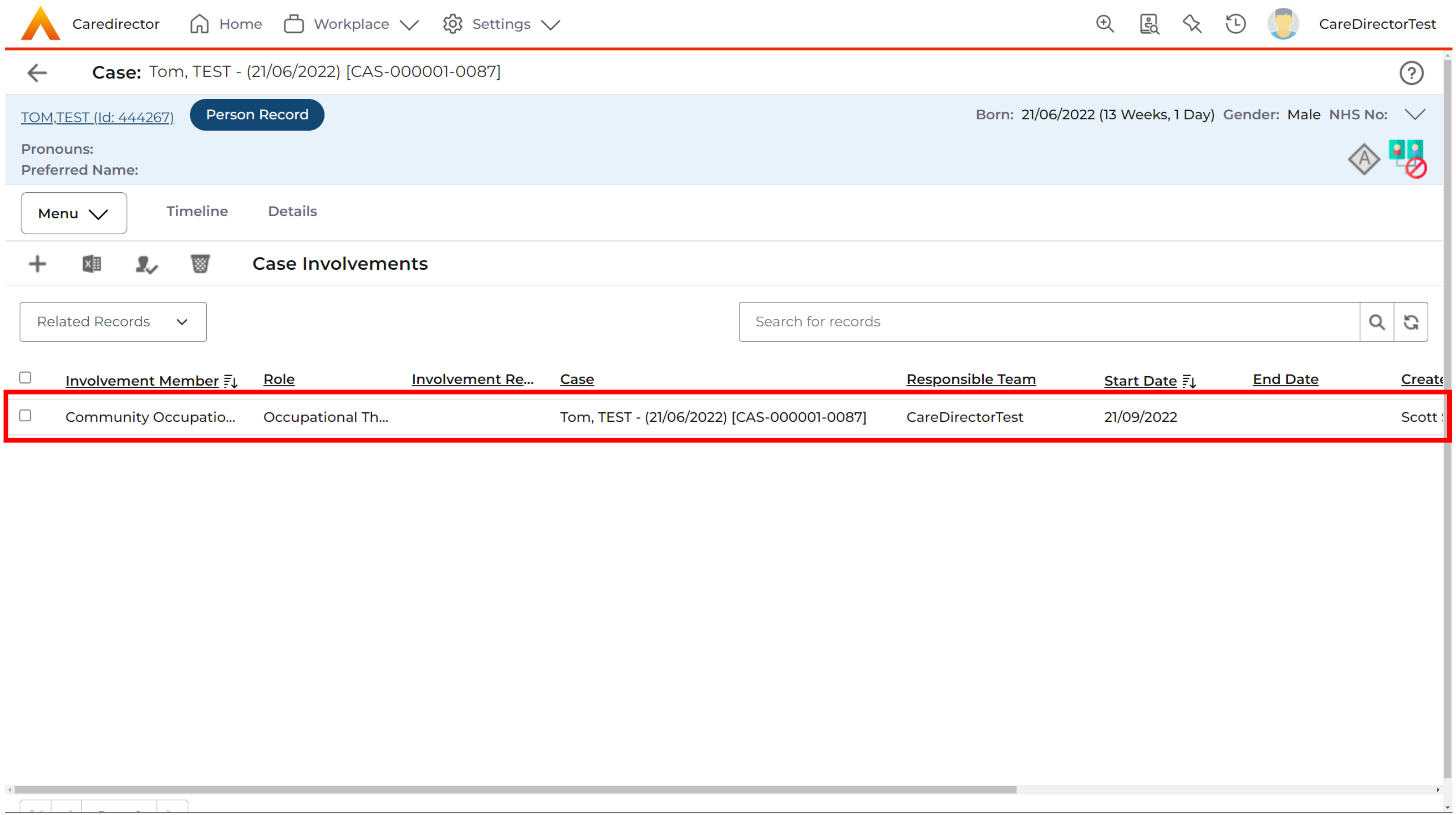
1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.

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**.

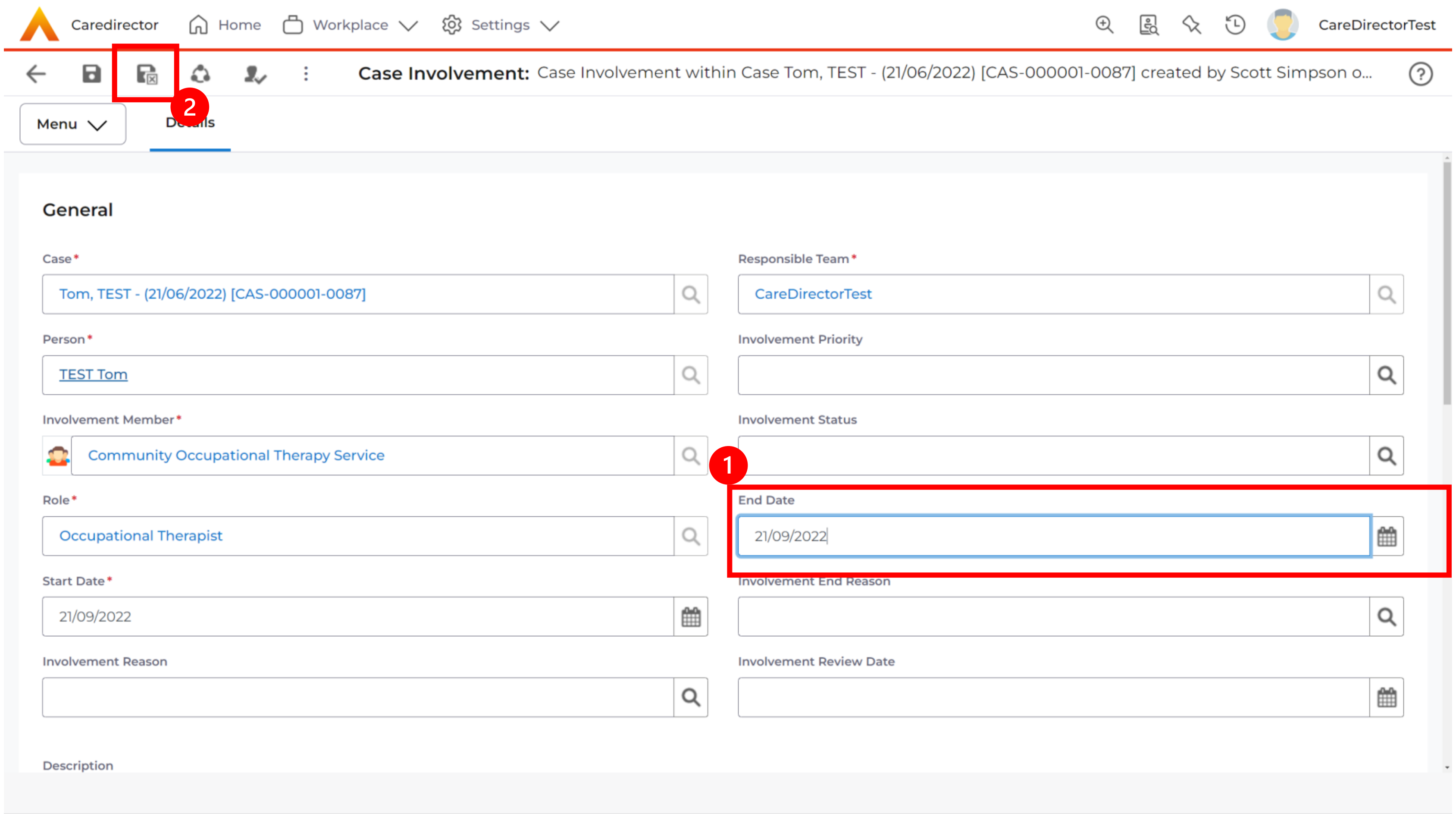
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements.**



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



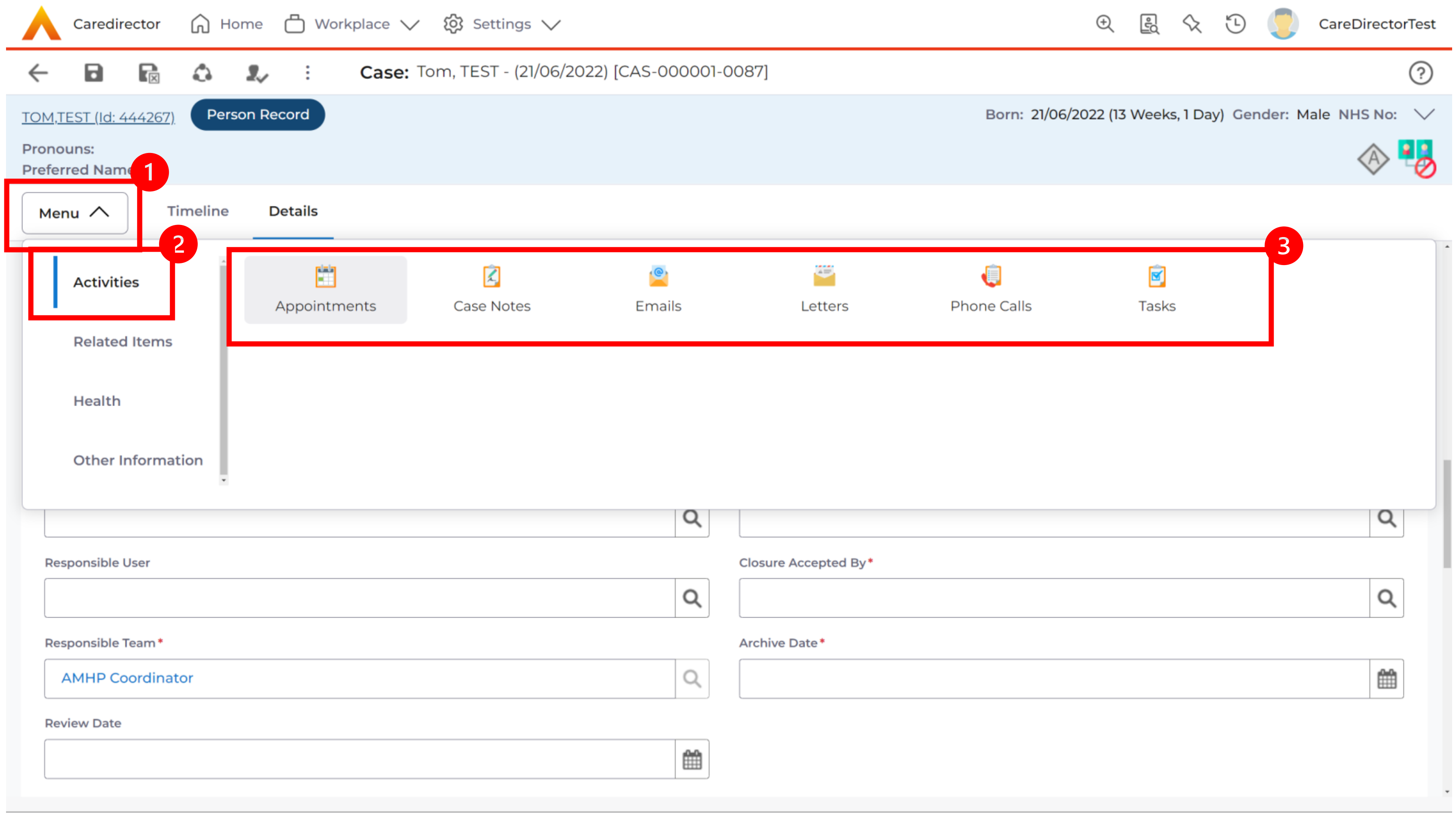
5. Enter today’s date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Secondary and External Involvements** are ended.



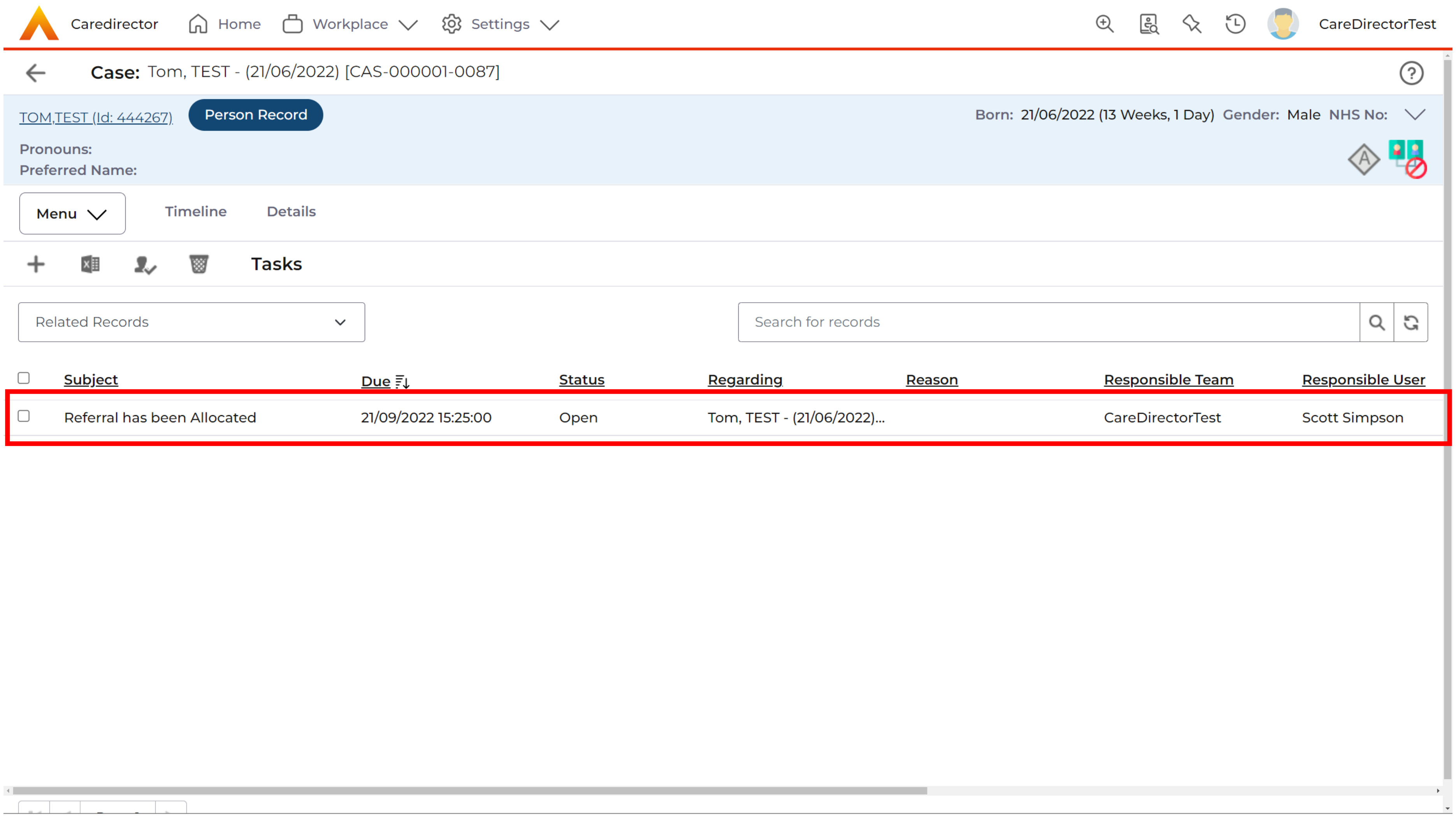
6. If the Case cannot be closed, there will be ongoing work associated with the Case.

Close an Open Activity

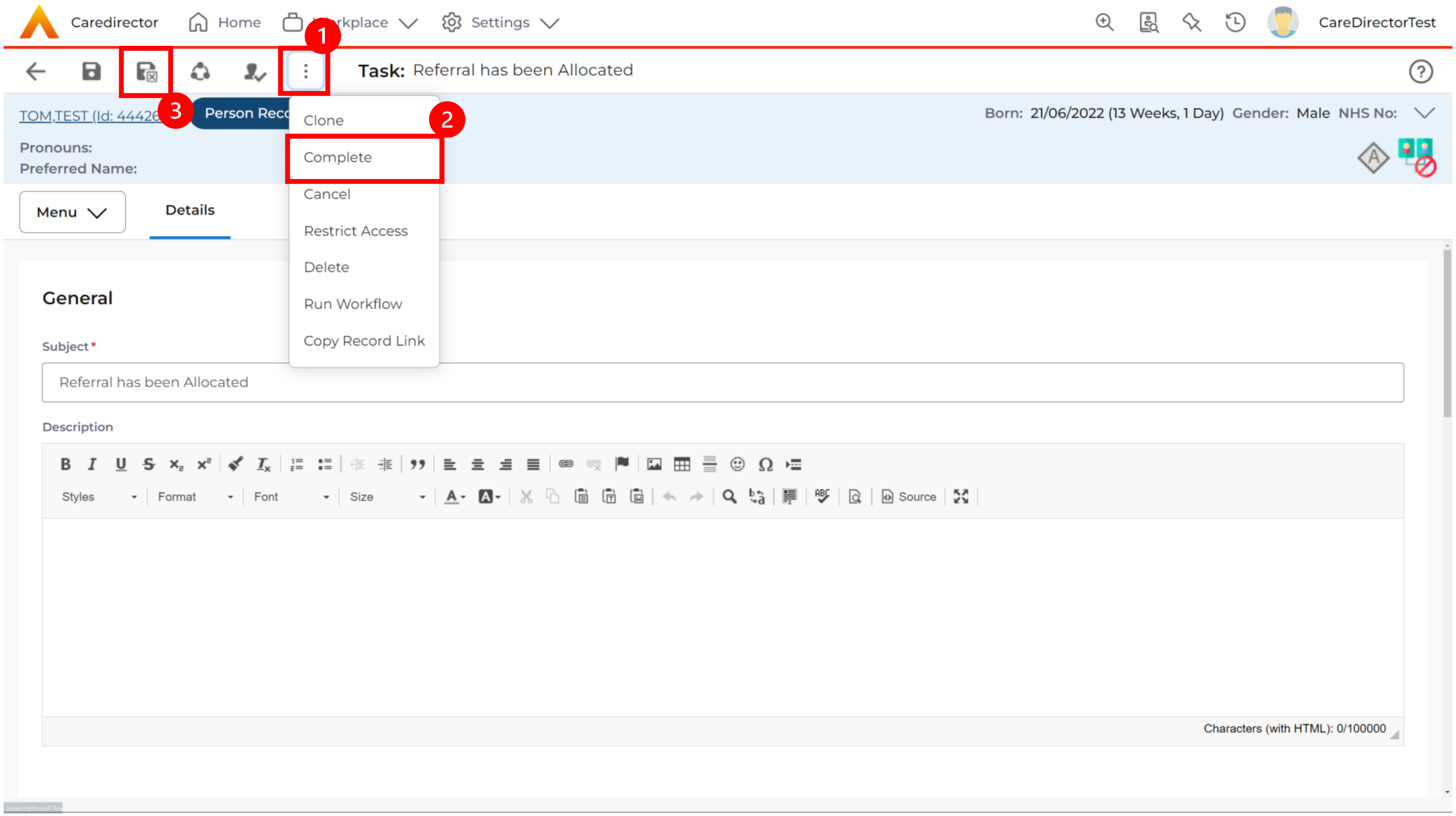
1. Select **Menu** within the **Case Record.** Then select **Activities** and open the relevant location of an activity.



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

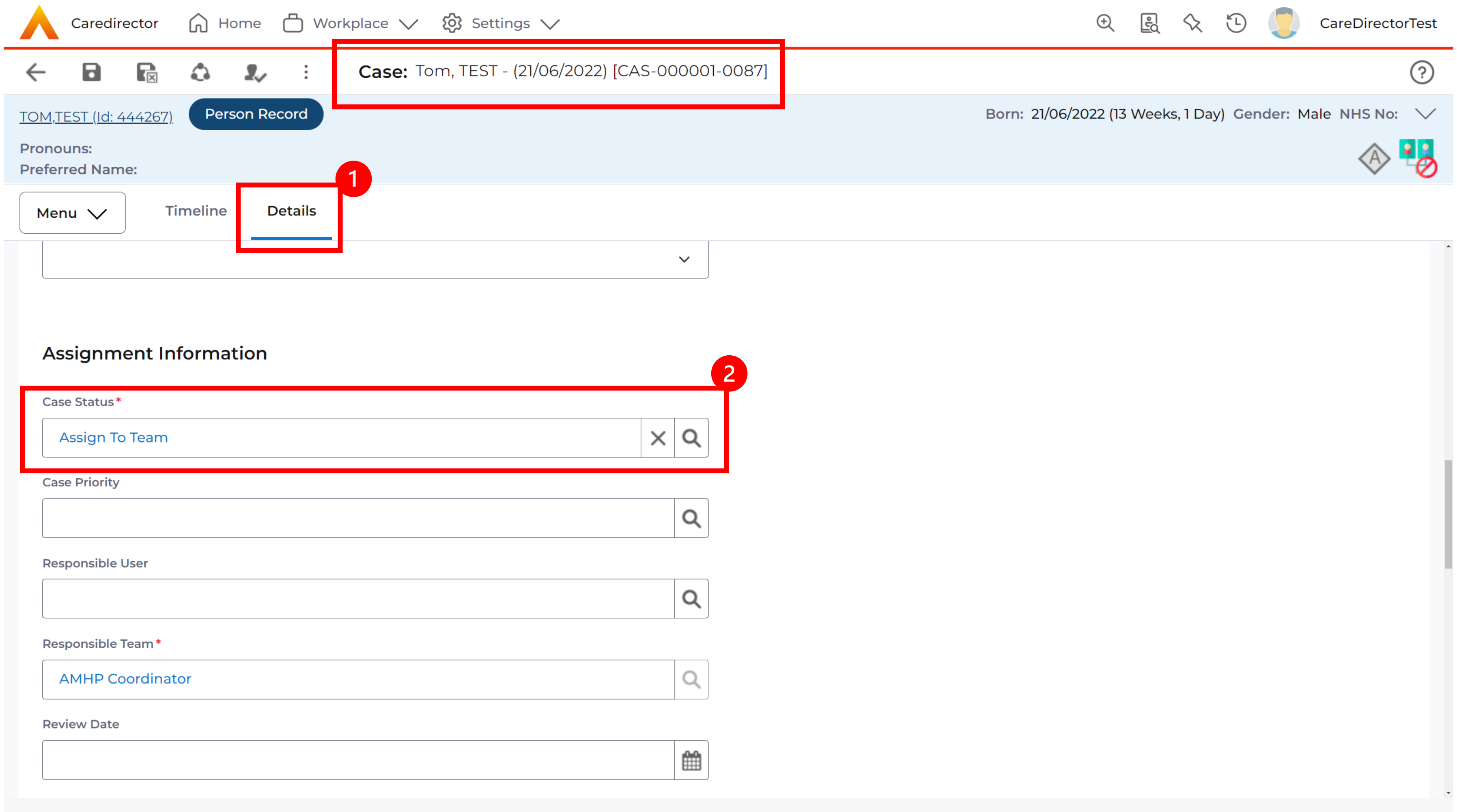


3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page.**

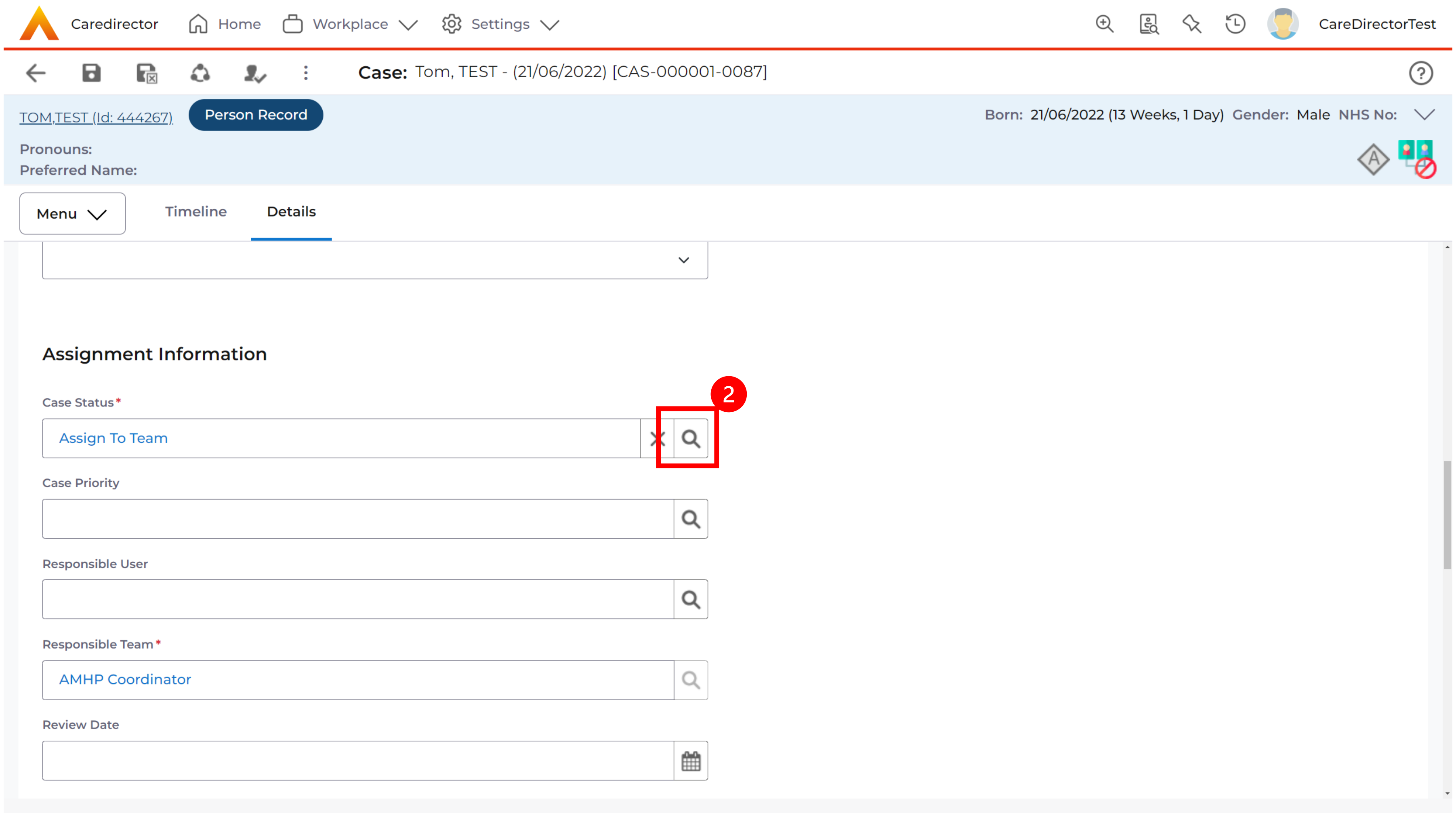


Closing a Case

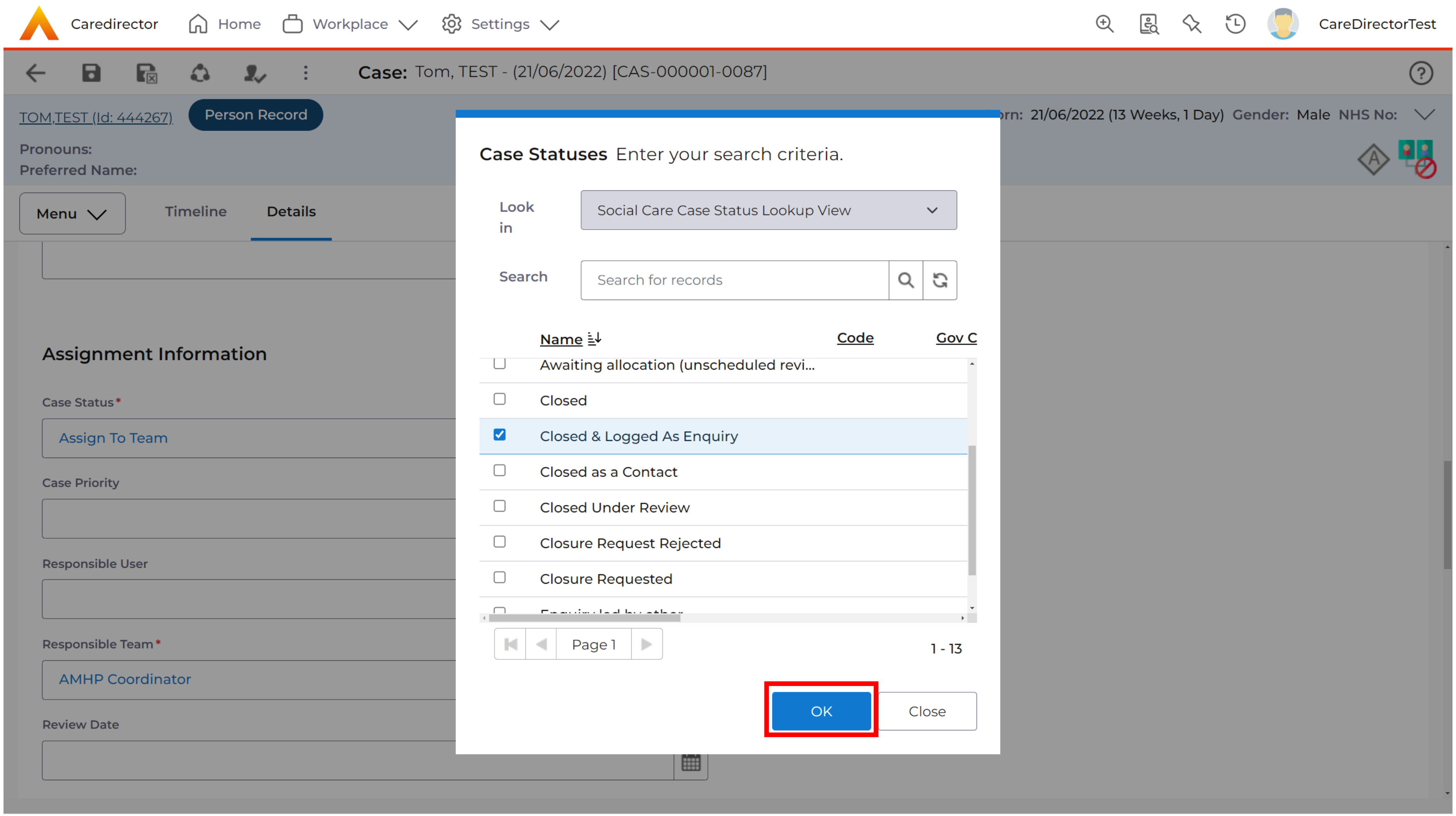
1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.



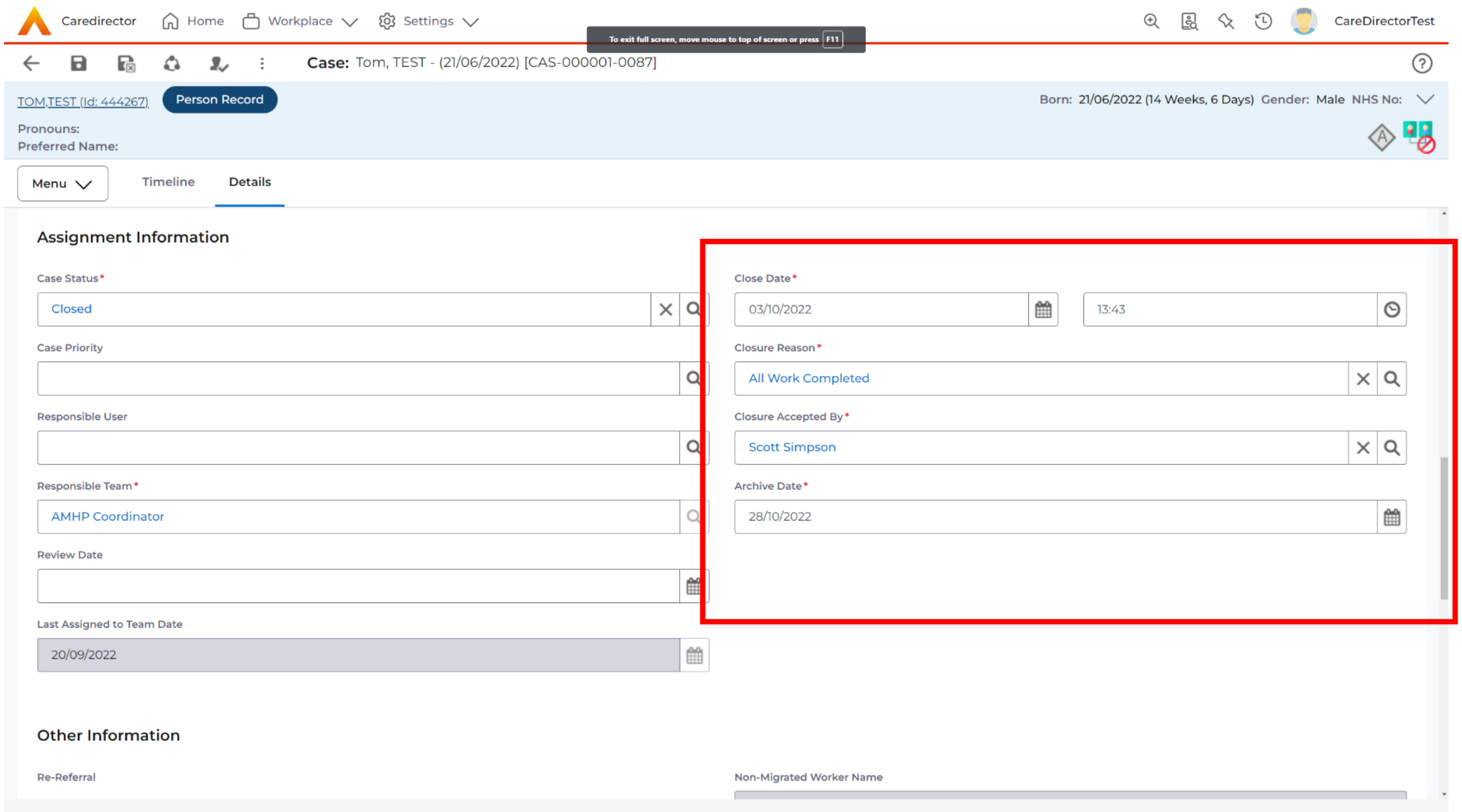
2. Select the **Lookup** function next to the **Case Status** field.



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



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.**

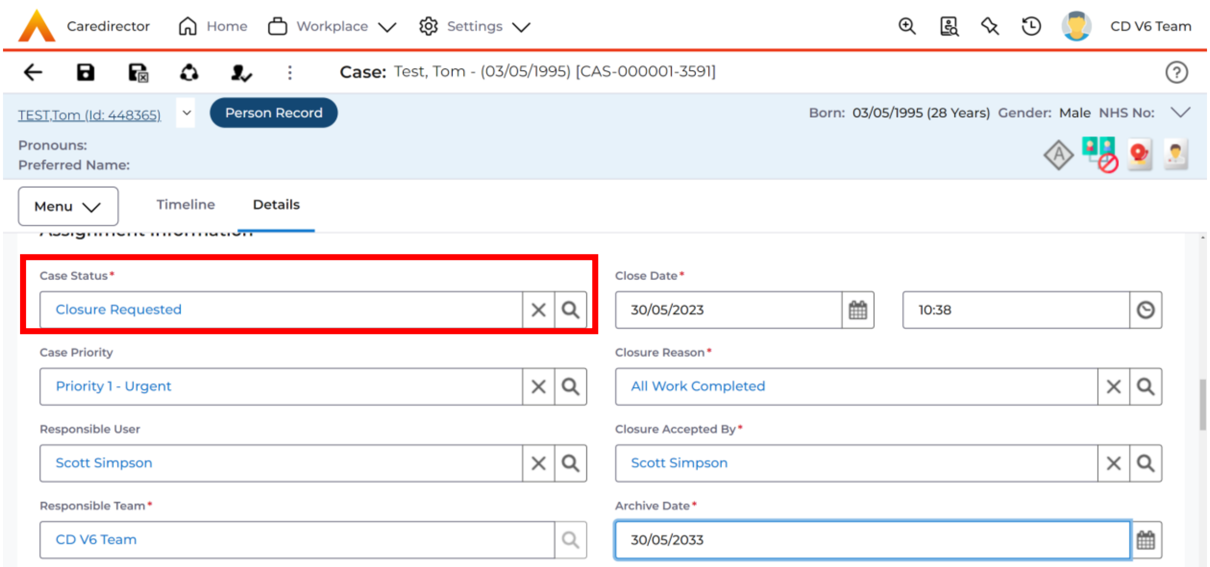


5. When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

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.



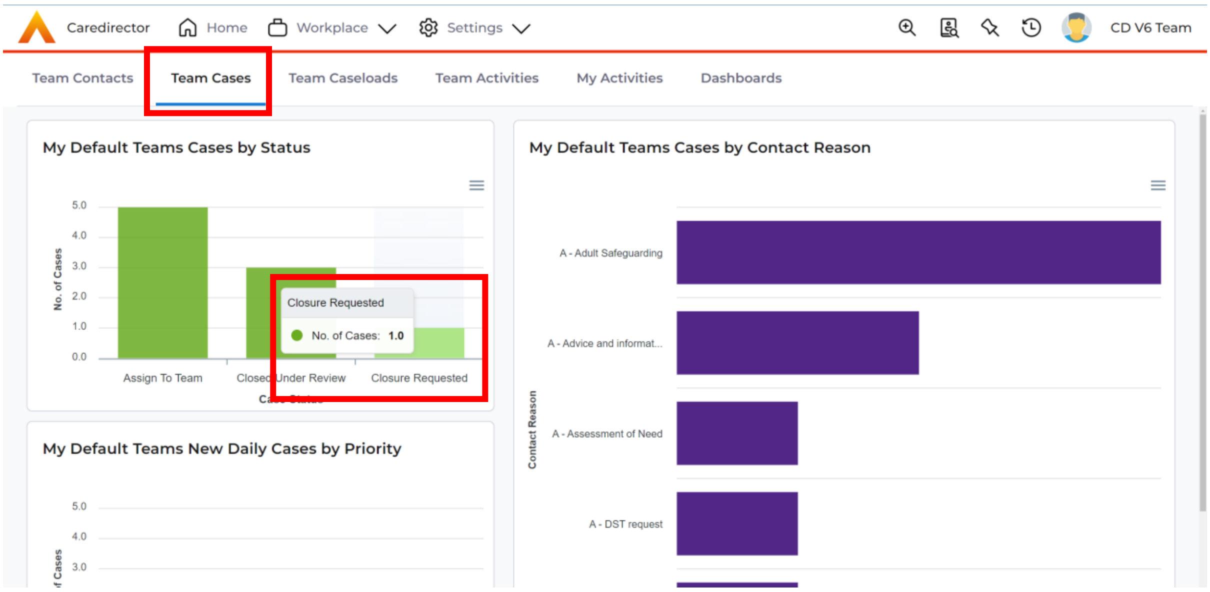
2. New fields will appear, asking “Closure Reason” “Closure Accepted By”

Field	Information
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.

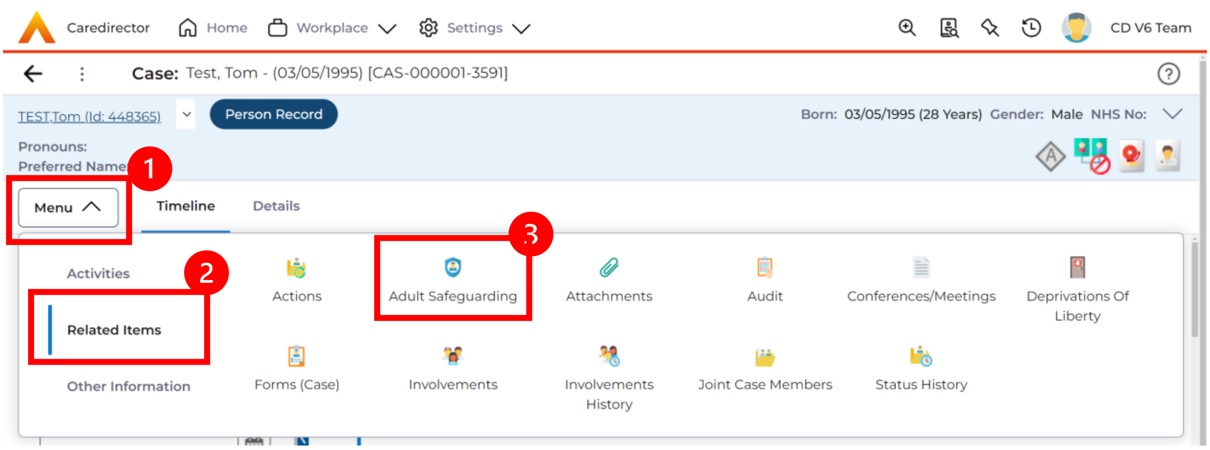
Managers

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.

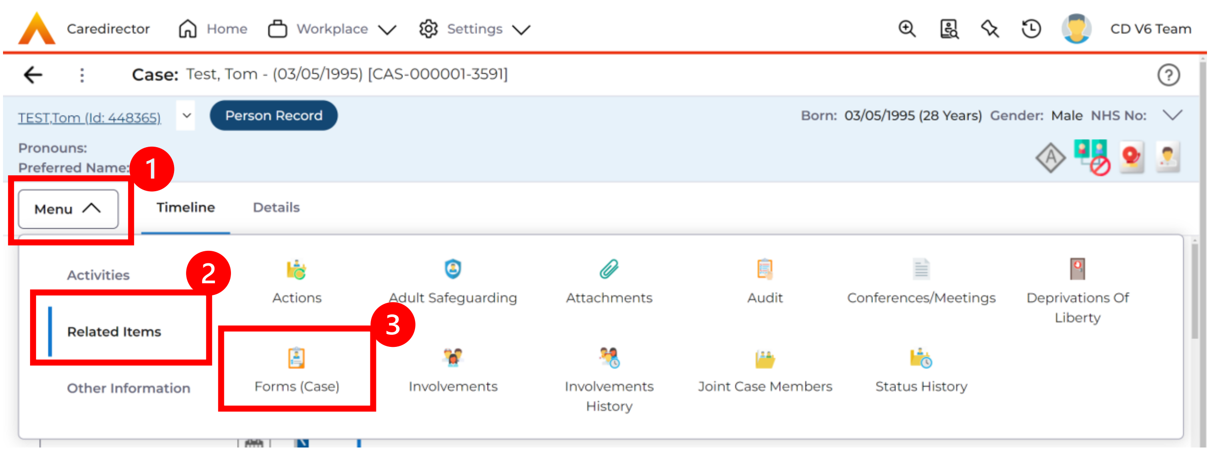


2. Here you will select the column "Closure Requested" and this will turn into a grid view. Select the relevant one from the rows.

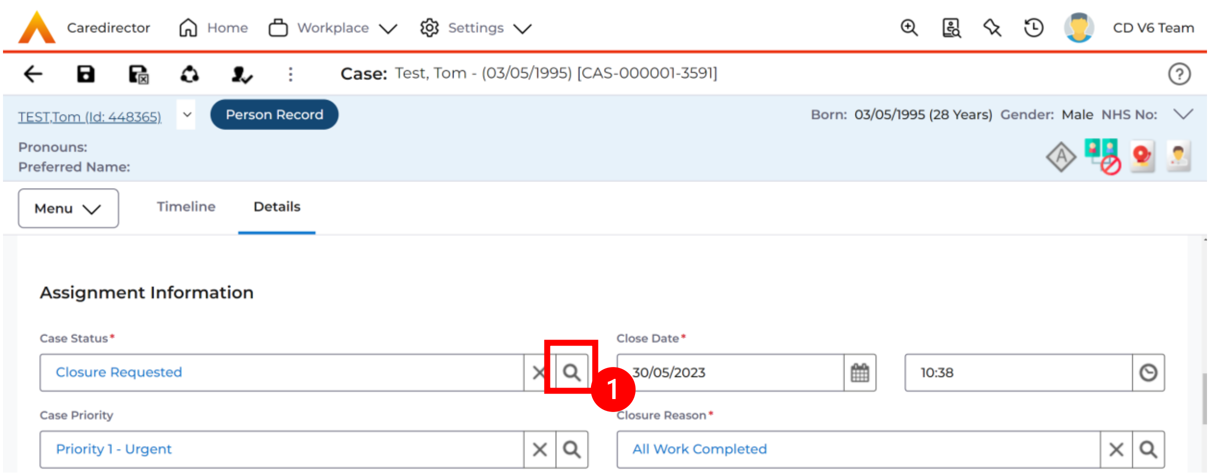
3. Once selected, it will divert you to the case record. Here you can check the safeguarding module via:
   Menu > Related Items > Adult Safeguarding

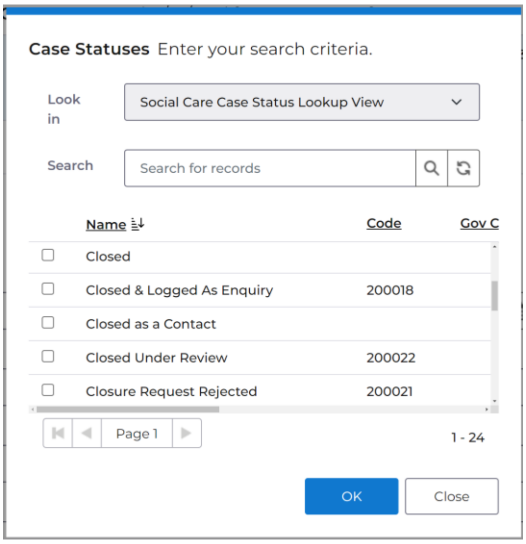


4. Alternatively, you can find the "Forms (Case)" via:
   Menu > Related Items > Forms (Case)
   Select from the list and then the pencil or eye view to view the form once inside a form has been selected.

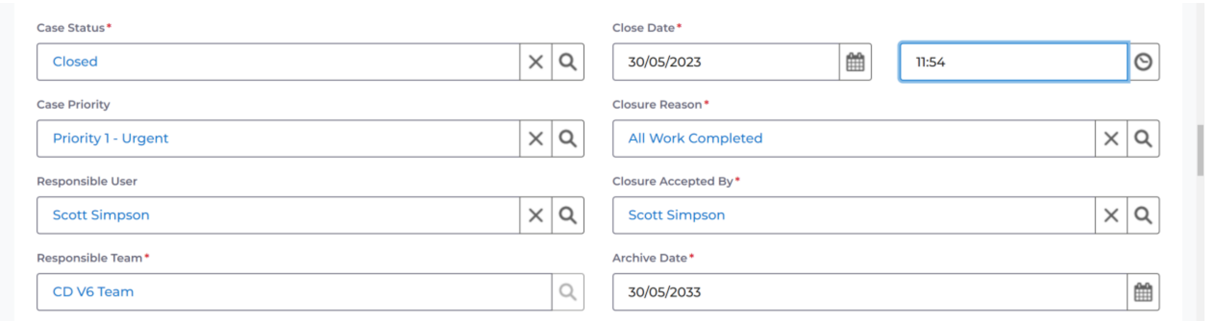


5. Once you are happy with the information, go onto details and you can either accept or reject the closure. Under "Case Status" select the "lookup function" and choose "Closed" – if accepted/ or "Closure Requested Rejected" – if rejected.

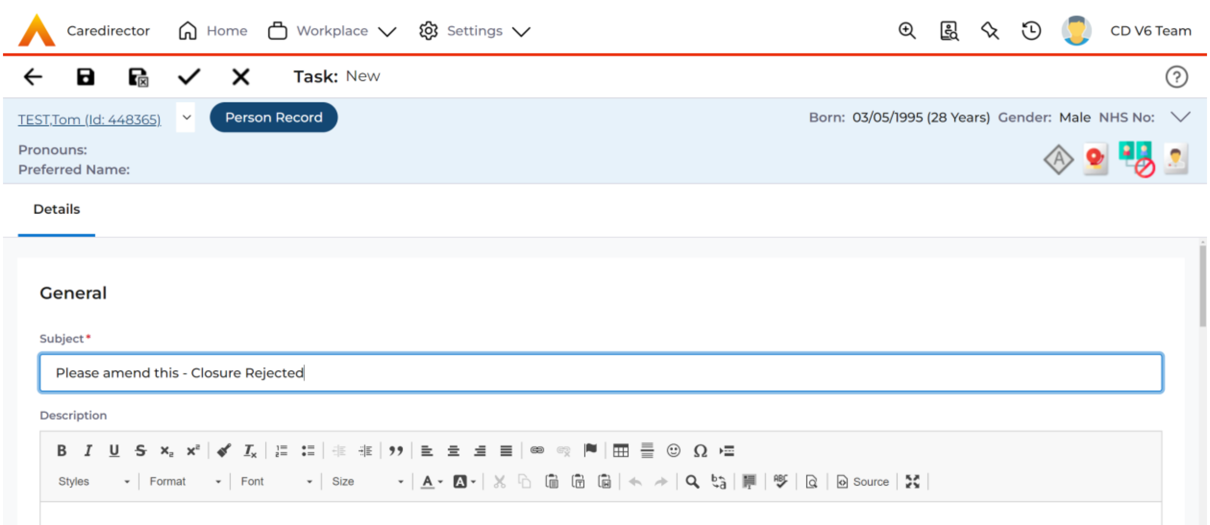




6. If “Closed” was selected, please amend the closure date, closure accepted by to your name if chosen or leave as practitioner. Then “Save”, this will now remove itself from your dashboard.



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.

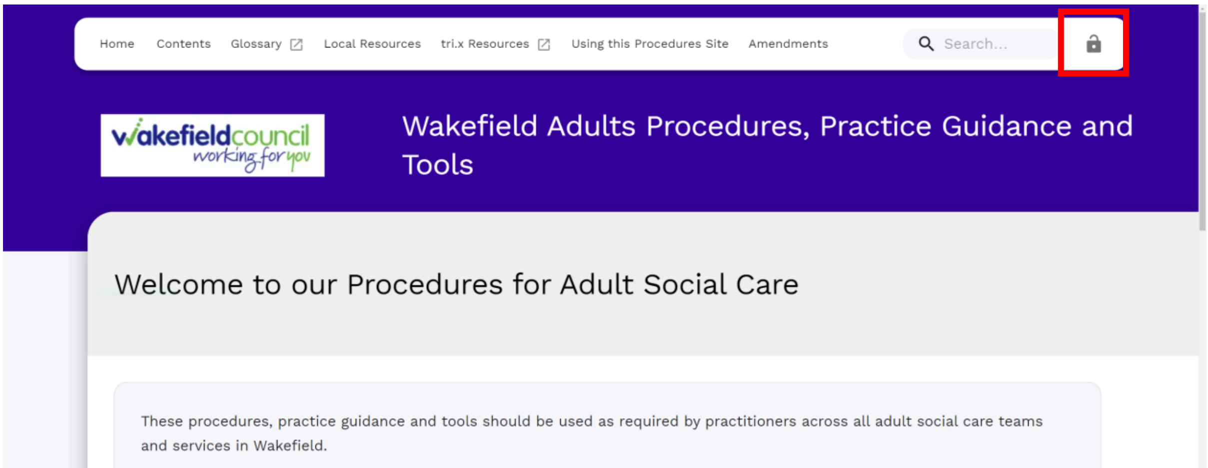


Further CareDirector Guidance

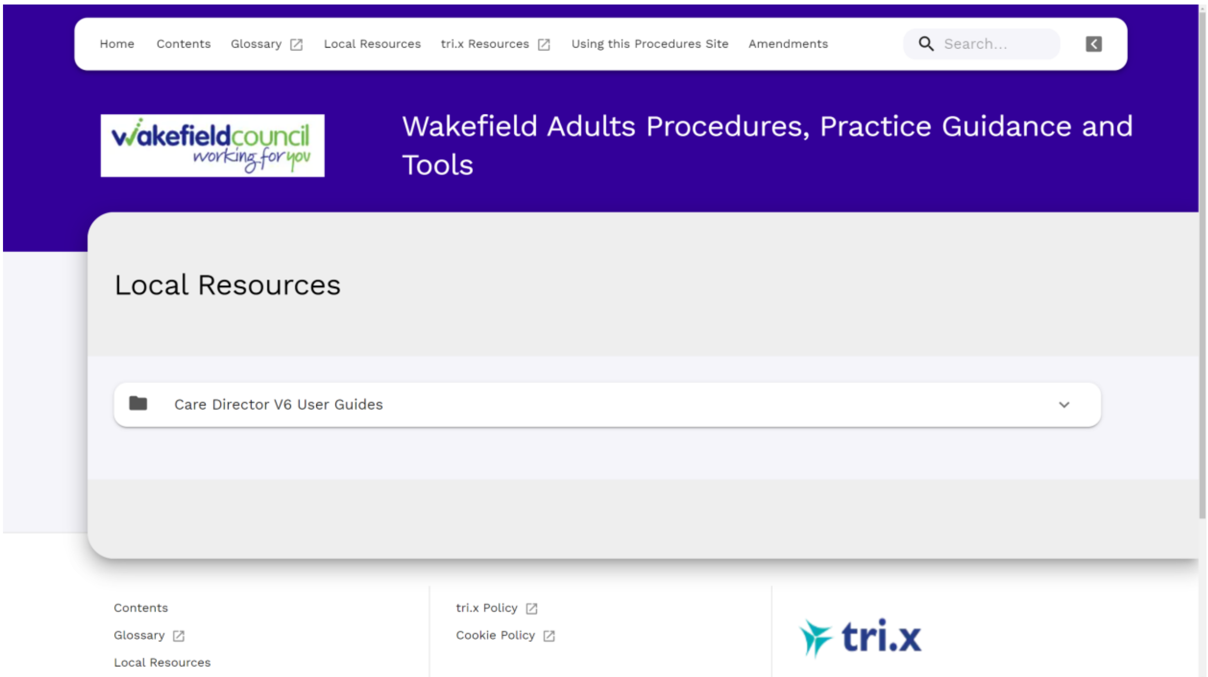
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

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. - Practitioner instructions - Managers instructions	SS	30/05/2023