Customer Services
V1.0

Document	CareDirector Customer Services.
Purpose	Customer Services team daily tasks on CareDirector.
Version	V1.0
Owner	ICT Business Transformation Team
Last Updated	11/11/2022

Contents

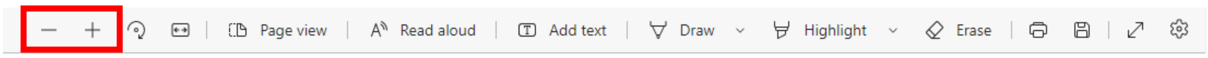
Guide Information

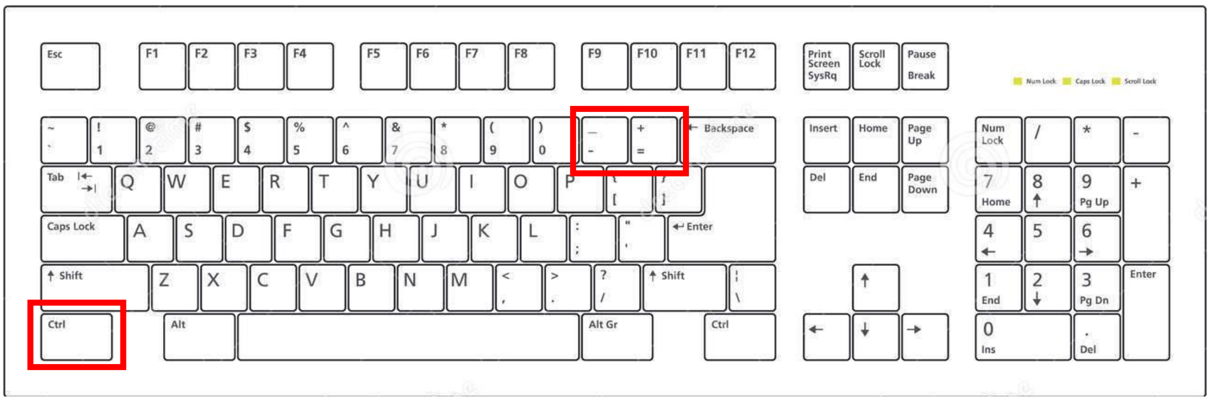
Before Live Access…

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.

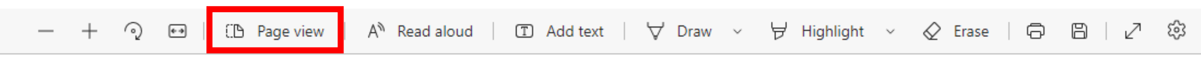
Guide Navigation

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.

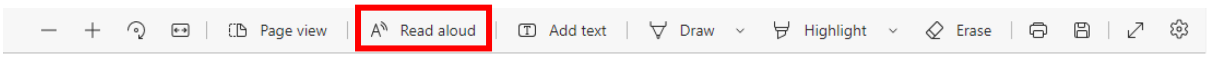




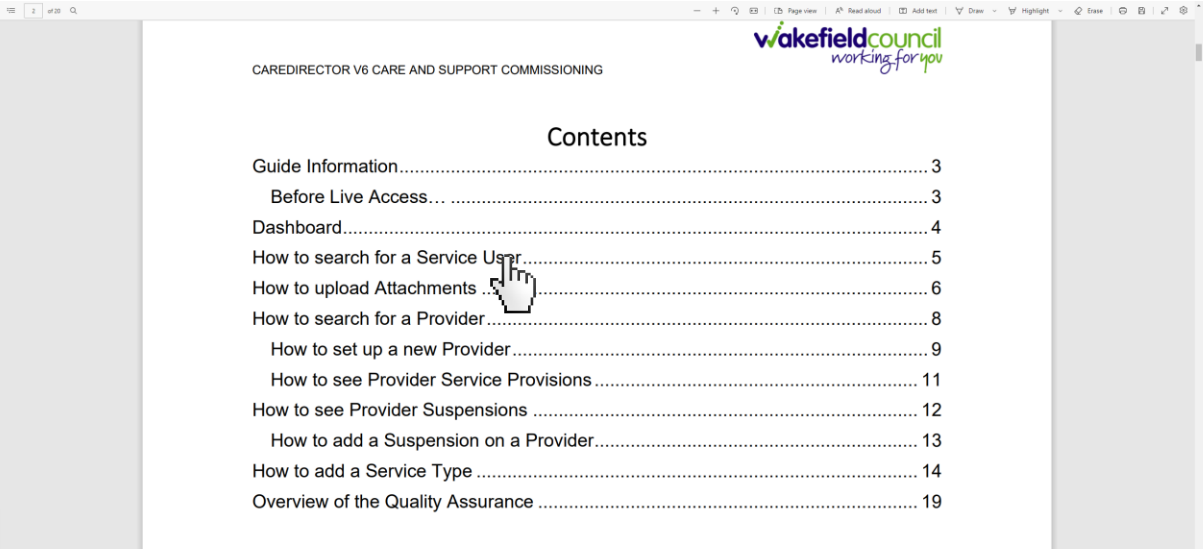
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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

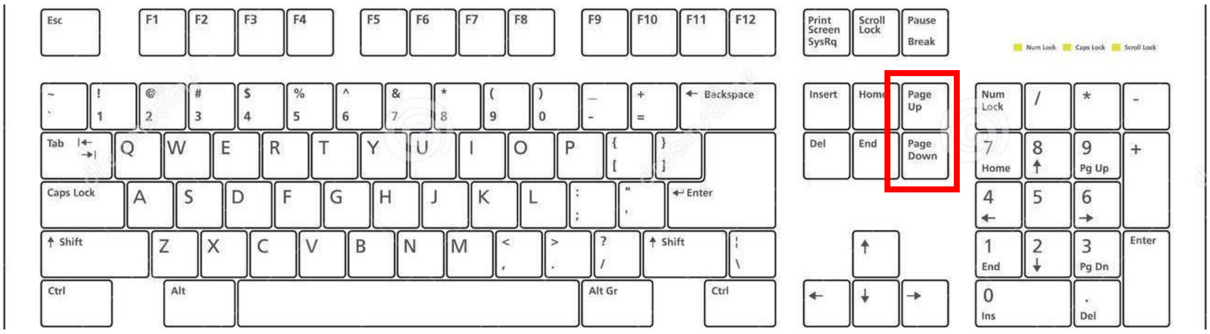


5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.

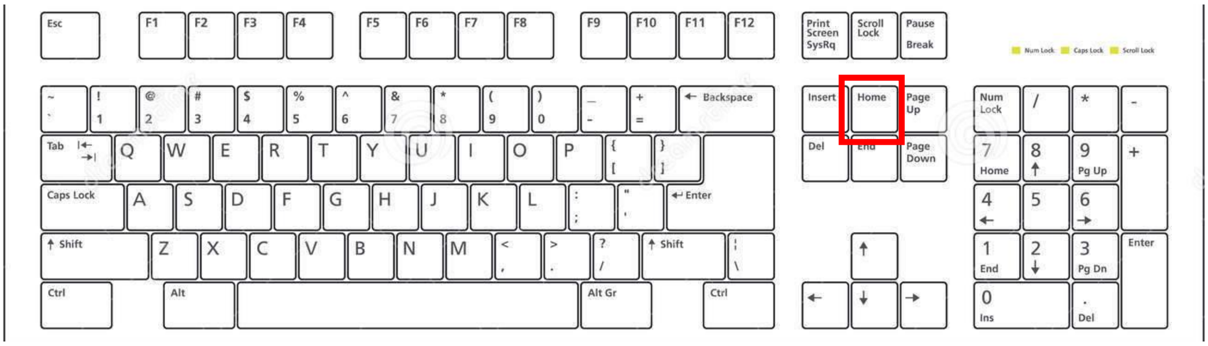

CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

Contents

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.

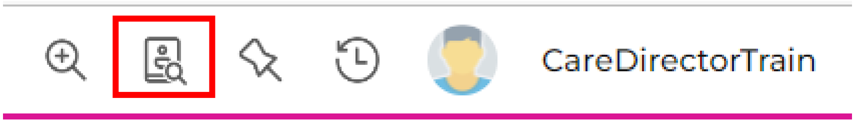


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.

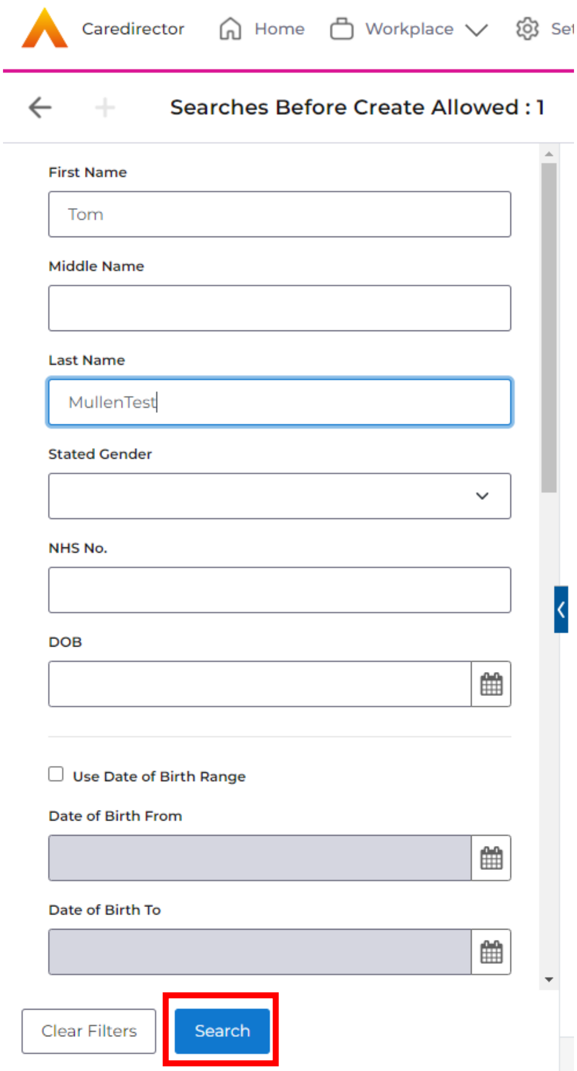


How to search for a Service User

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



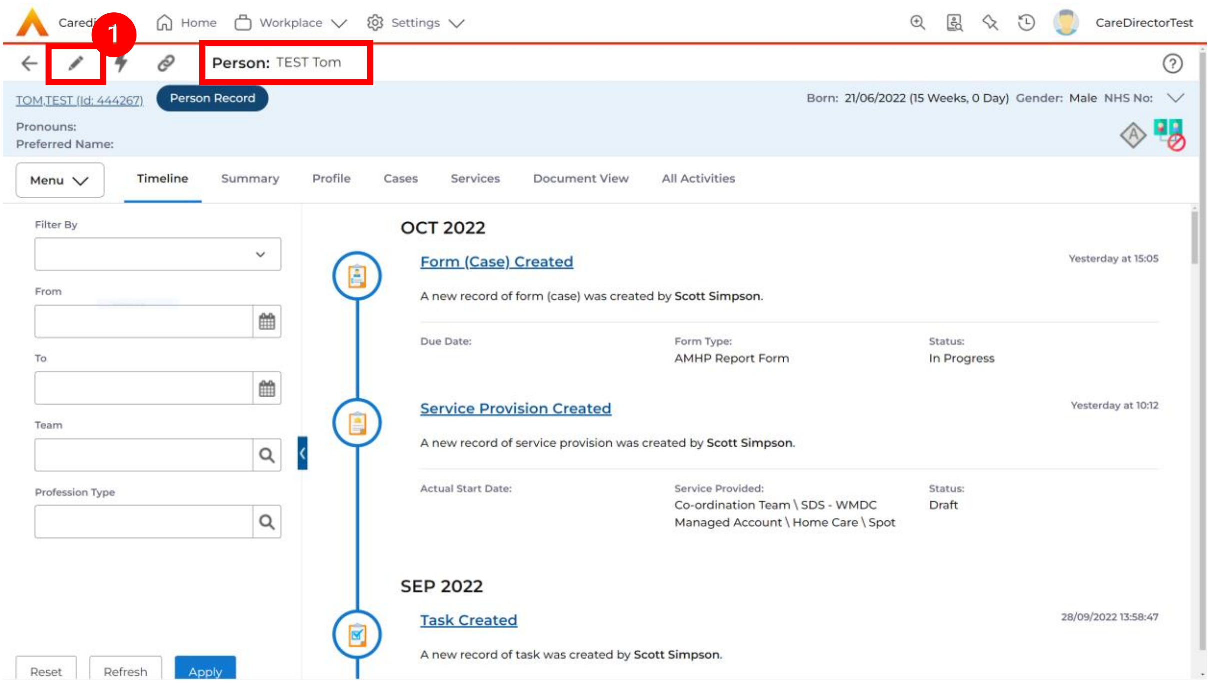
2. Enter their details provided. When finished, select **Search**.



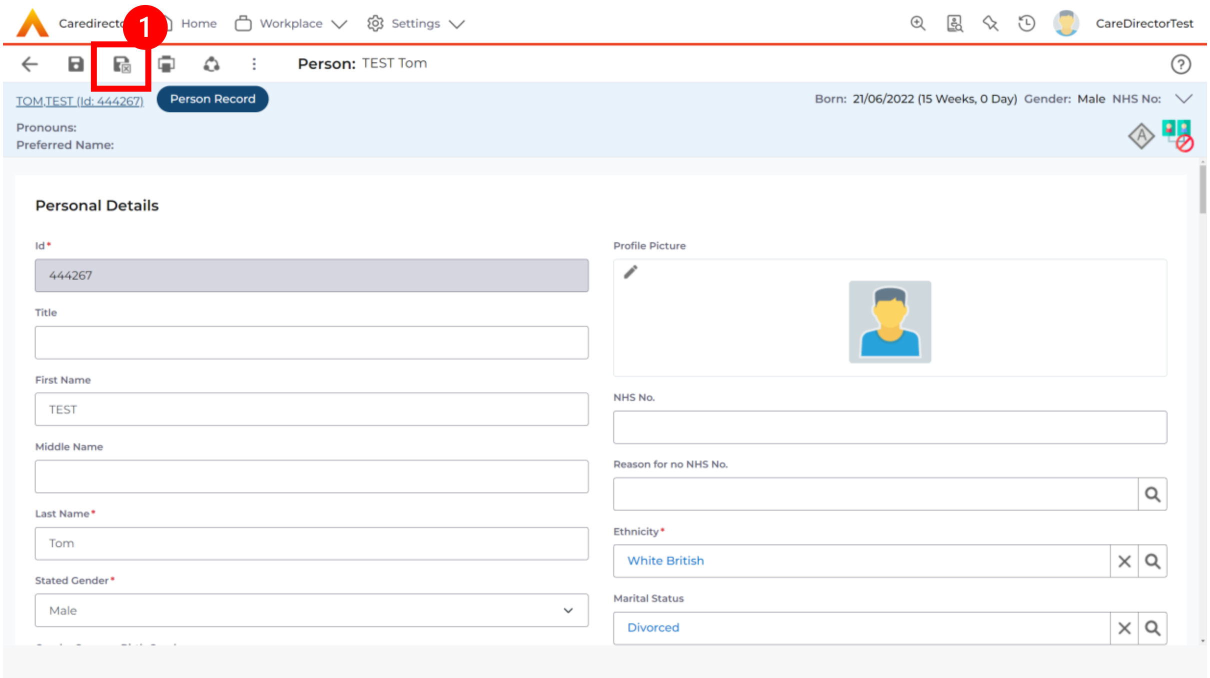
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

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

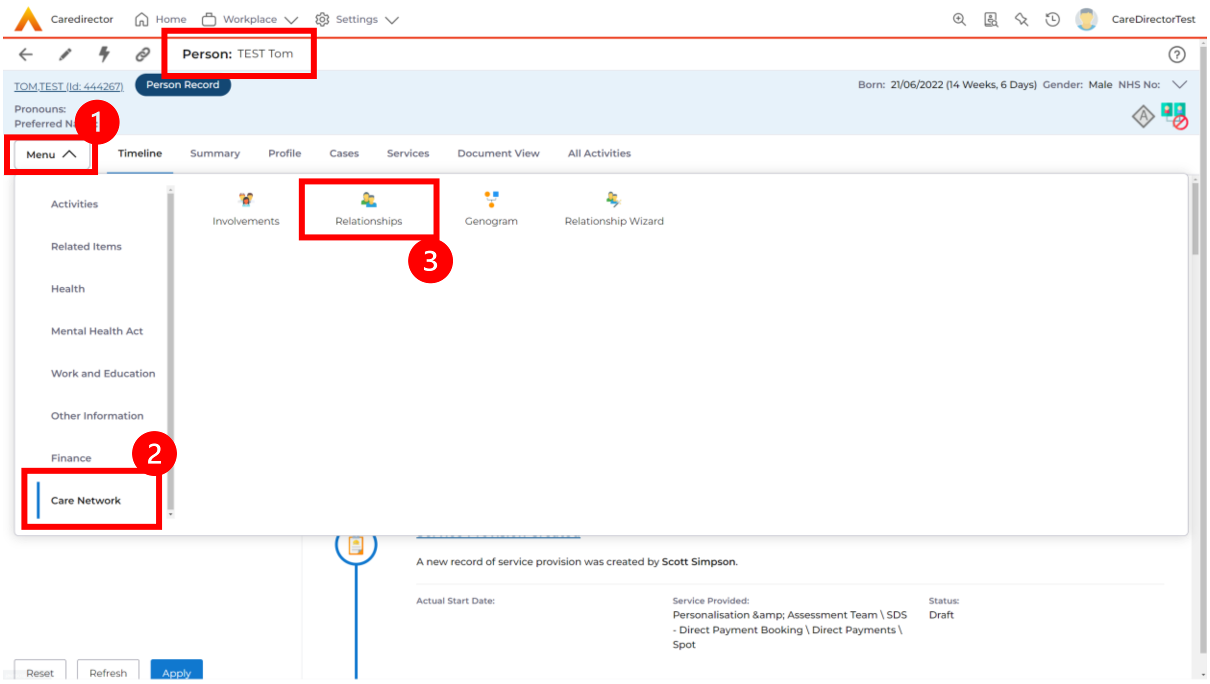


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

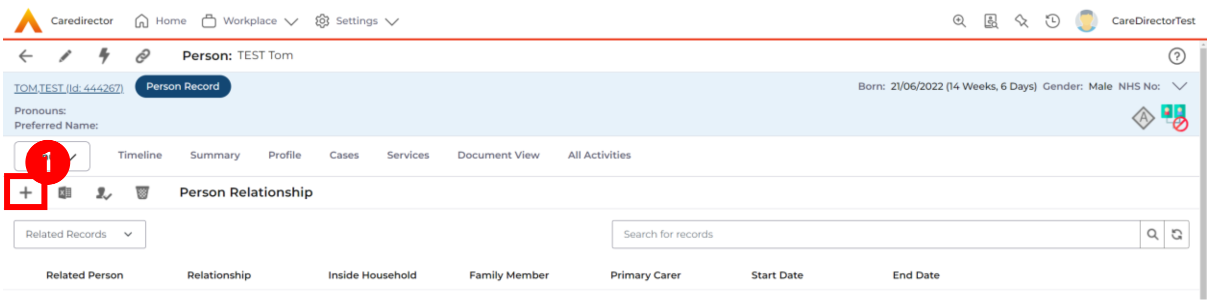


How to add relationships

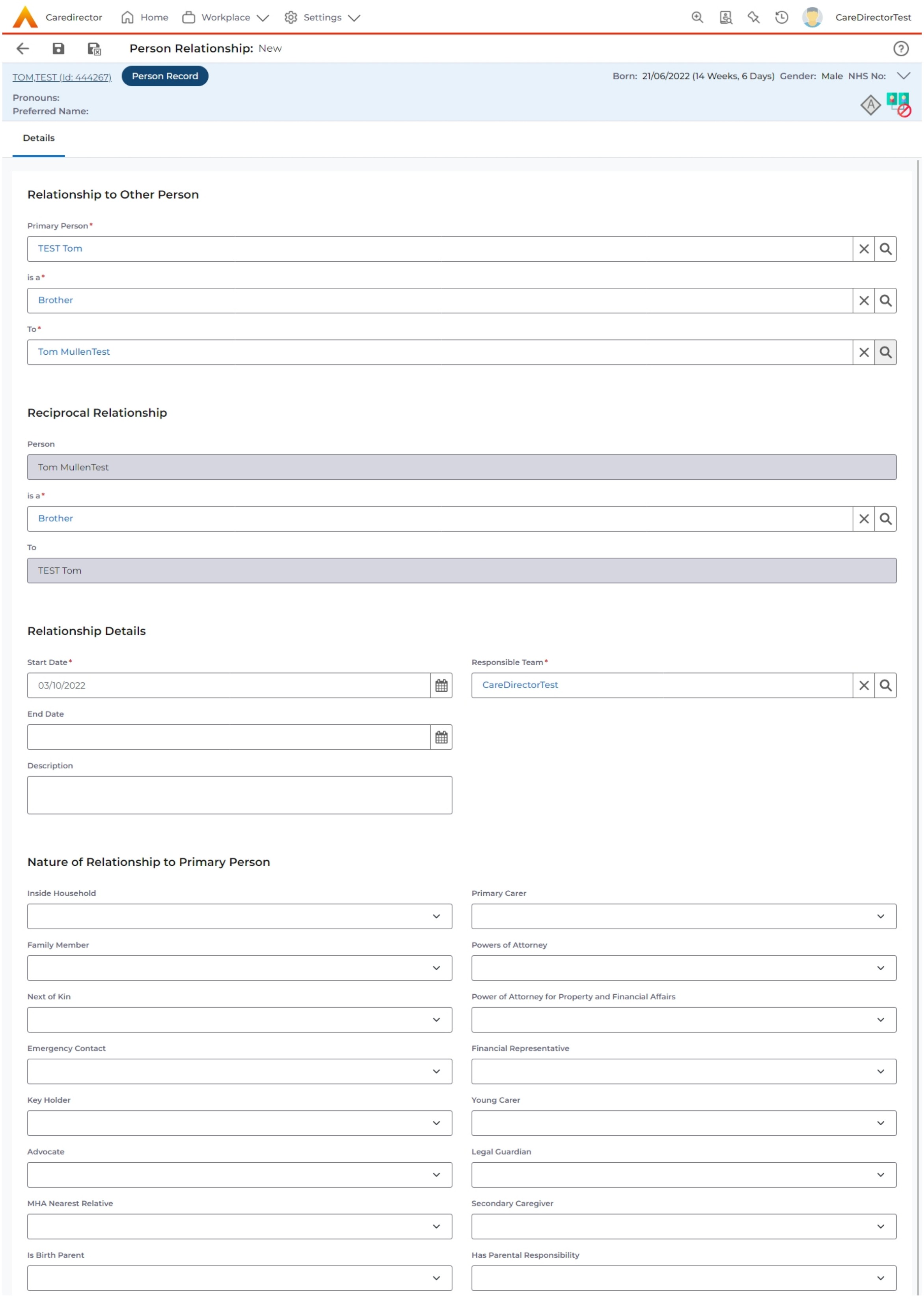
1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships.**



2. When selected, **Create New Record** from the toolbar.



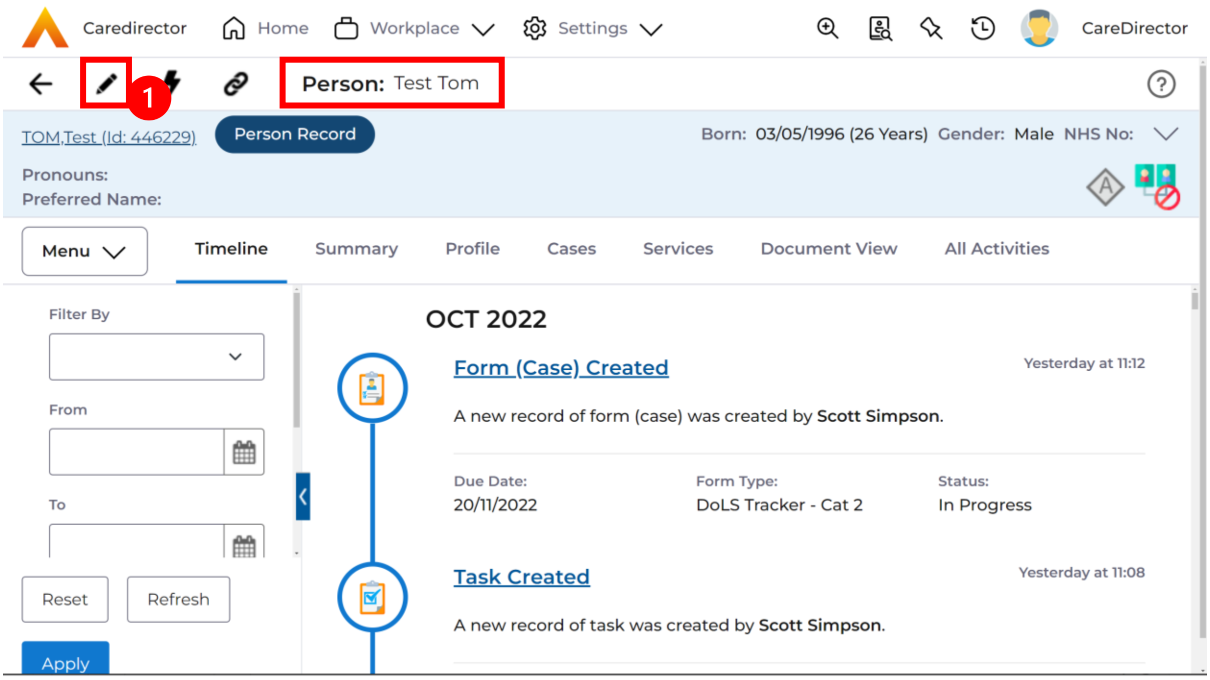
3. Inside this section:
    a. The **Service User** will be the **Primary Person**.
    b. **Is a** field, is what the **Primary Person** is **to** the other **Service User**.
    c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not 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.



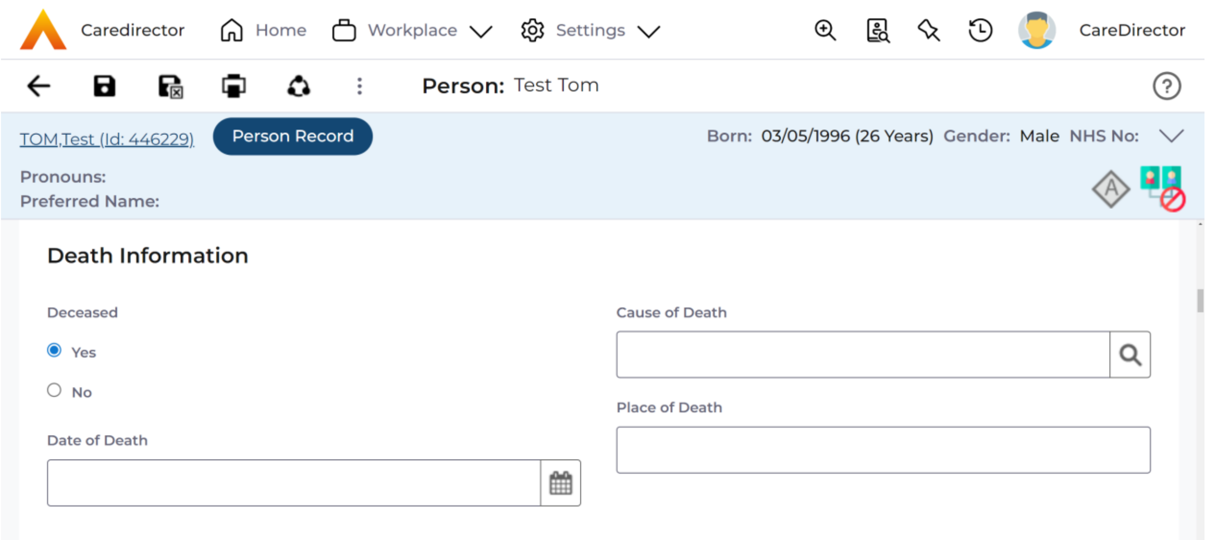
4. When finished, select **Save and Return to Previous Page.**

How to Enter Date of Death

1. Locate the **Person Record** and select the **Edit** icon on the toolbar.



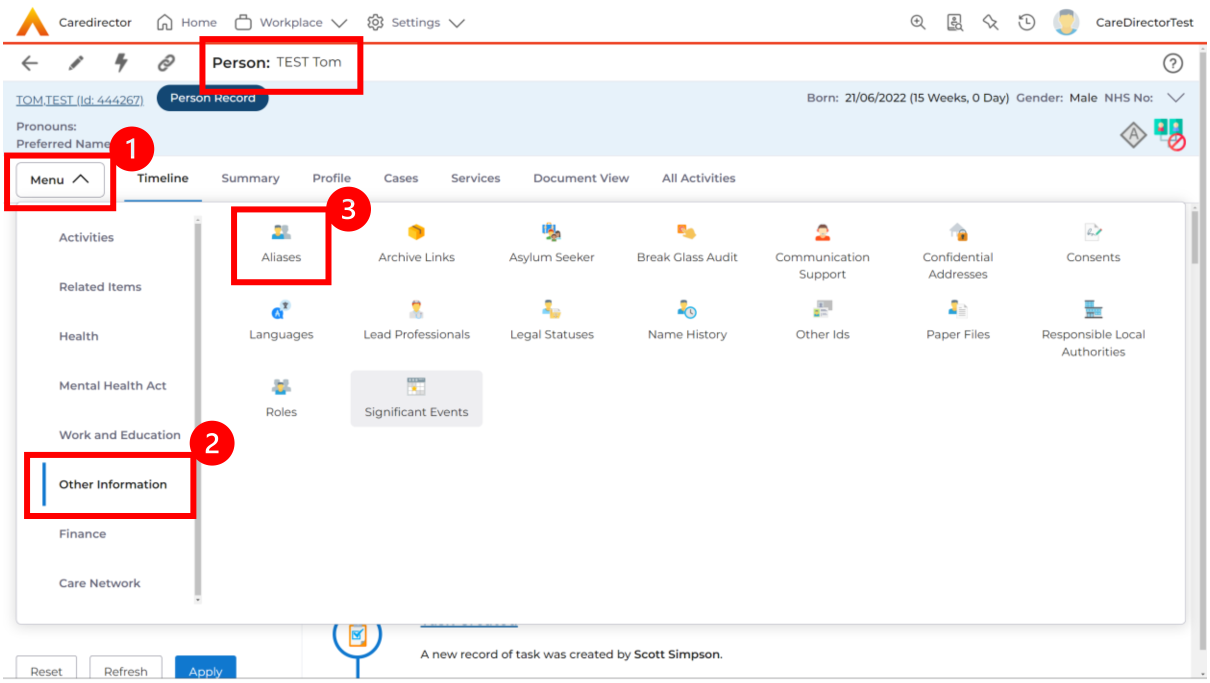
2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes.**



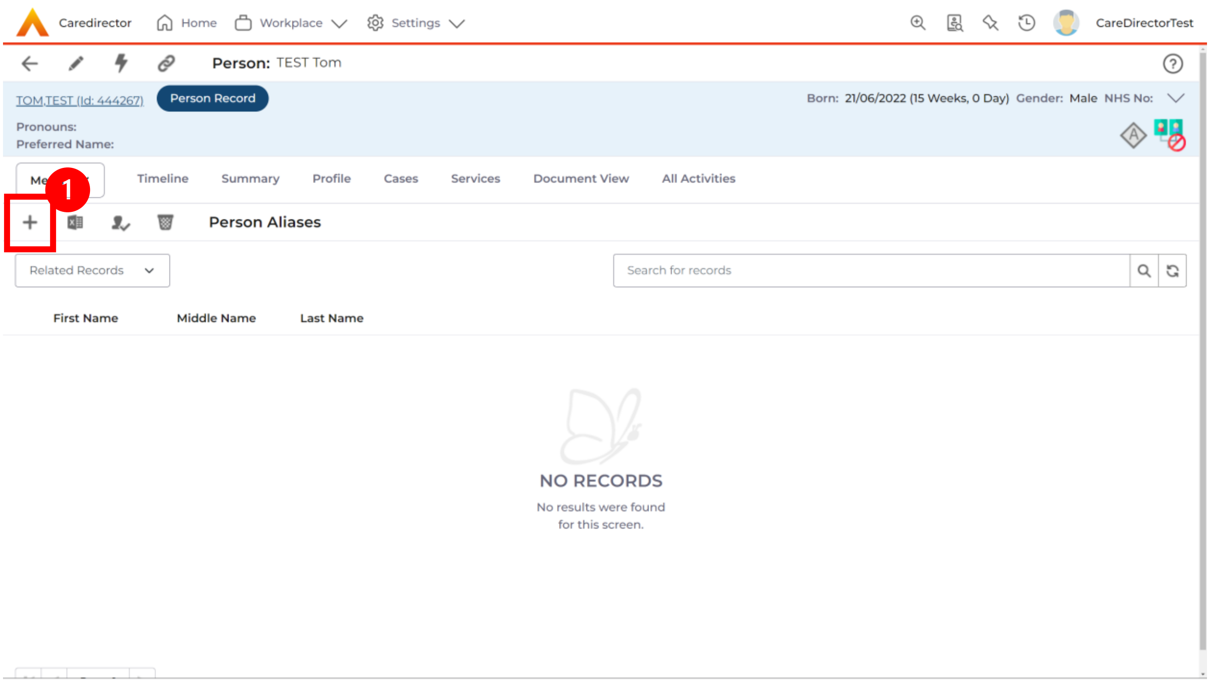
3. Enter in the details if known, when finished select **Save.** This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker.**

How to change a person's alias

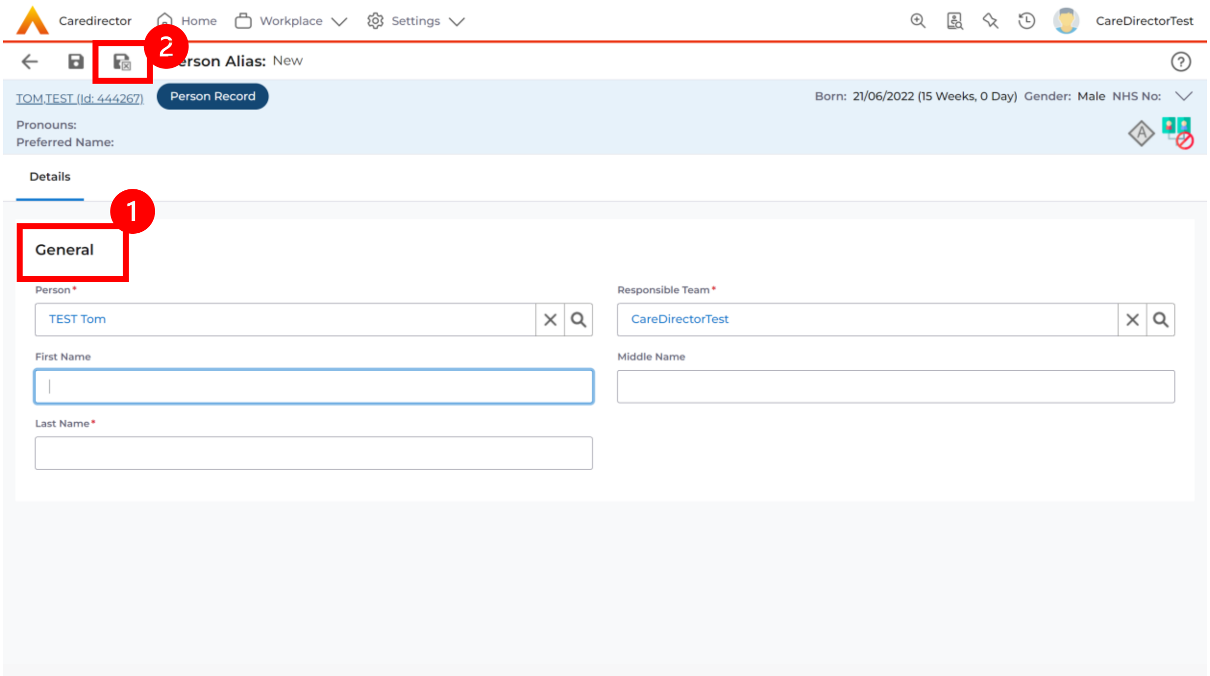
1. Open the **Person Record** that needs to be updated. Select **Menu, Other Information** and then select **Alias.**



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



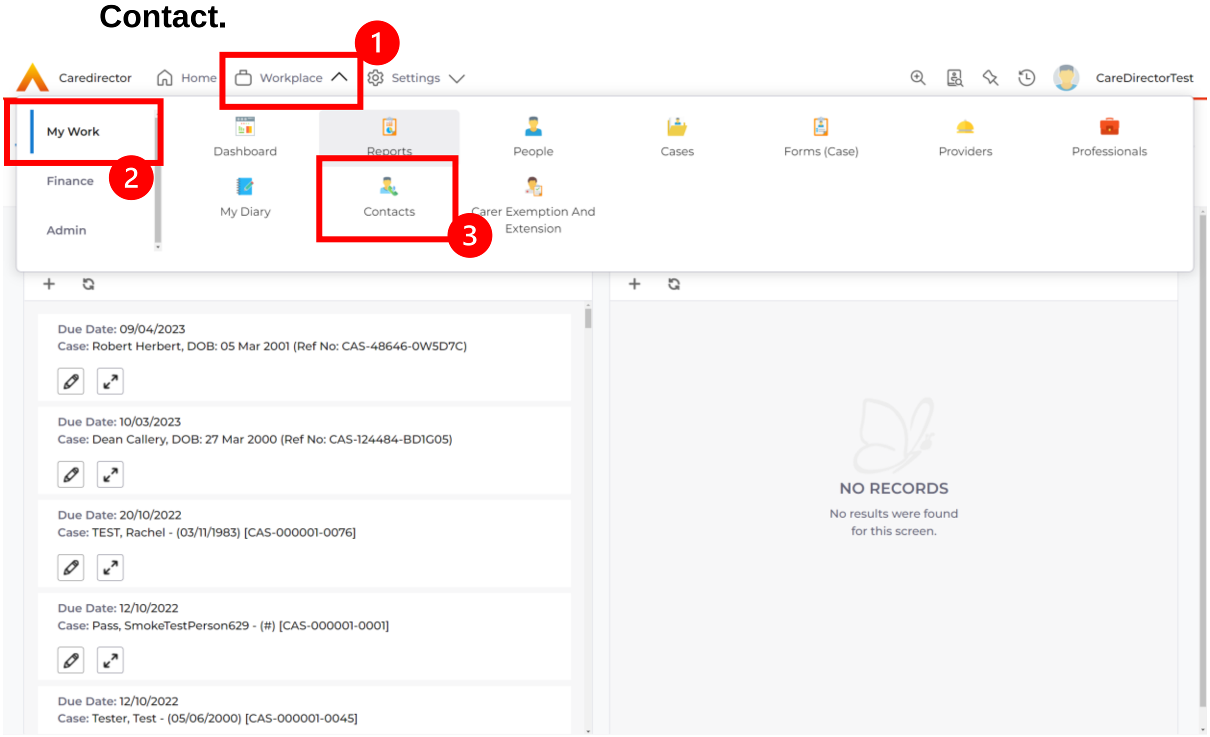
3. Enter the **Alias** details. The only mandatory field is **Last name**. When finished, select **Save and Return to Previous Page.**



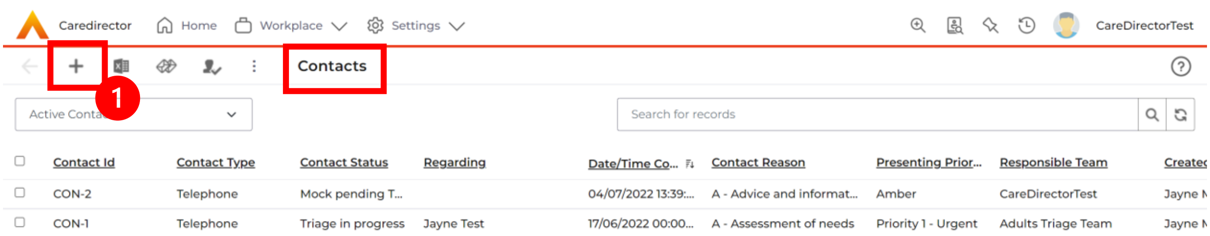
How to add a Contact

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.

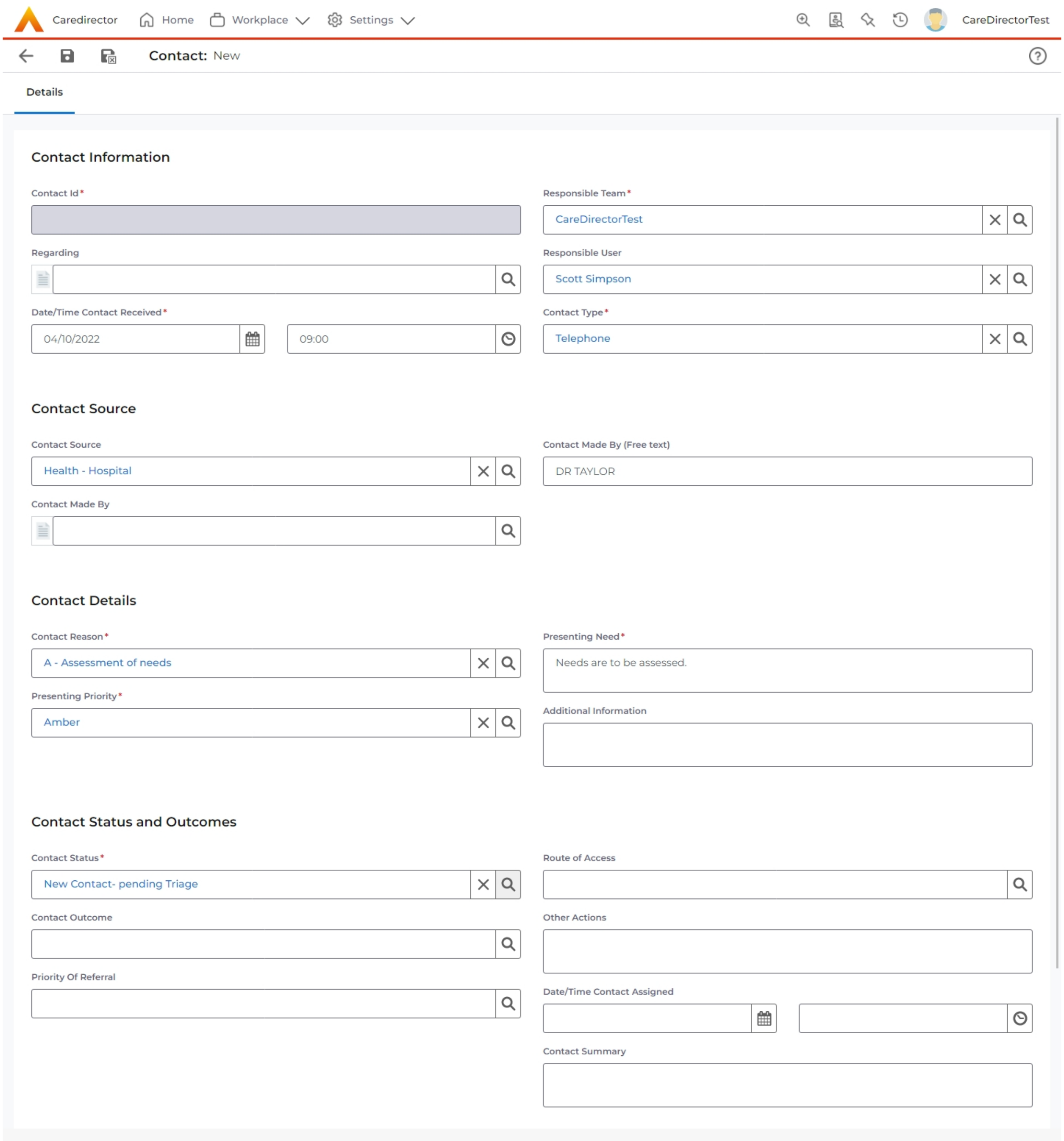
2. To create this **Contact** select **Workplace.** Then select **My Work** and **Contact.**



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

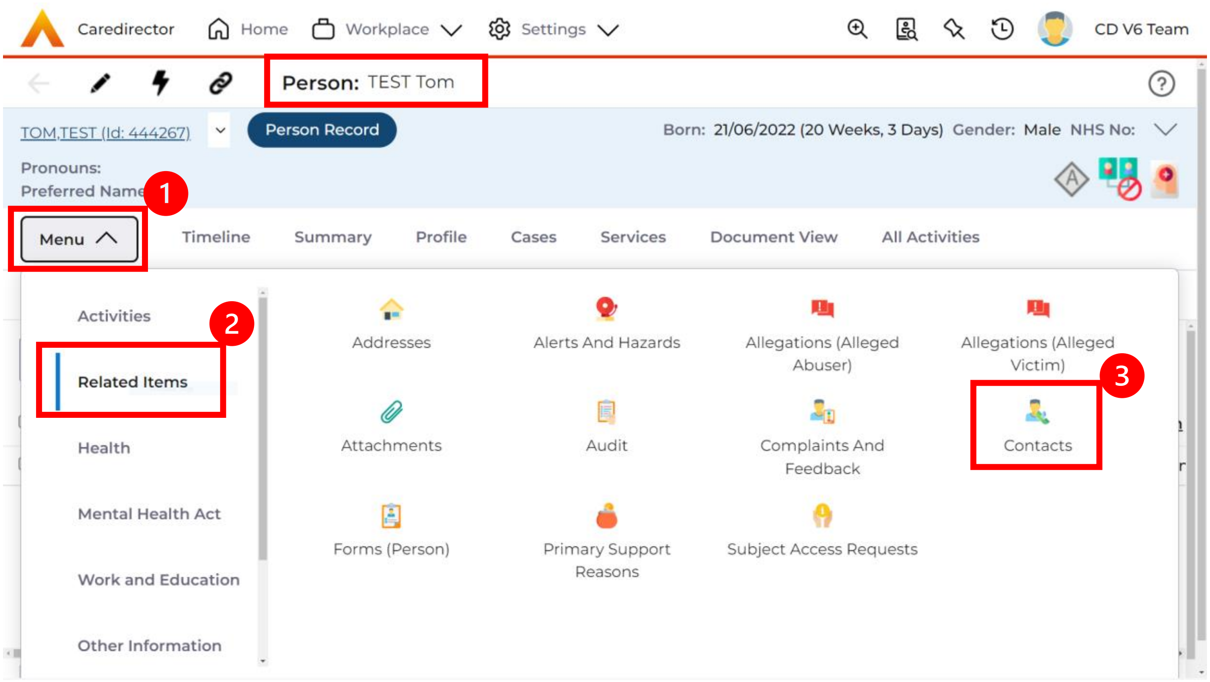


4. From the **Contact** creation screen, if later this **Contact** becomes **Triaged,** and the **Service User** is created into CareDirector then the **Regarding** field can be linked to that person. Once the information has been entered, select **Save** from the toolbar.

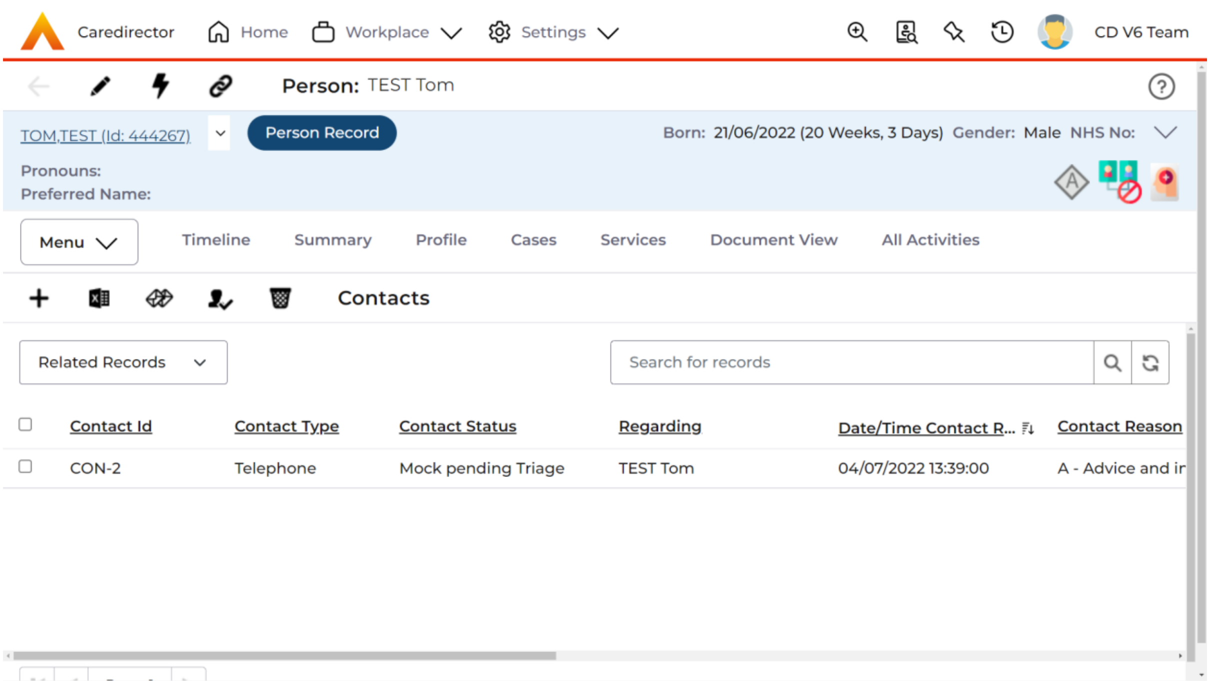


How to find a linked Contact

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

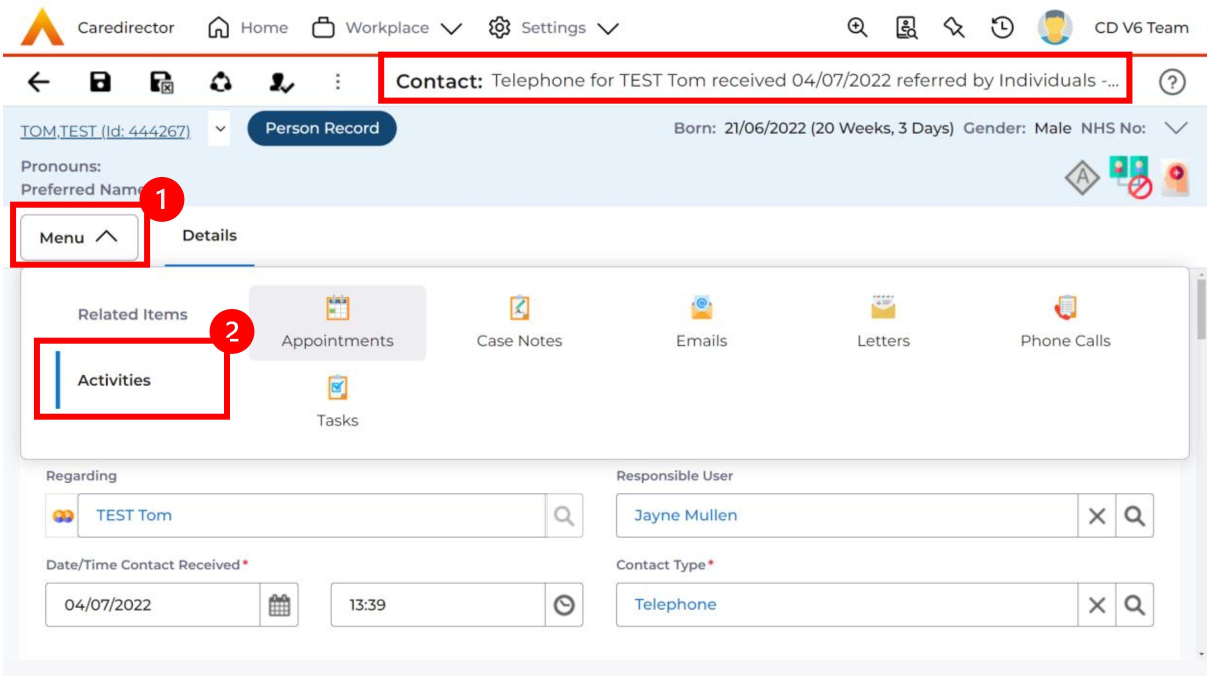


2. Once opened, it will show the linked **Contact** for that **Person Record.**

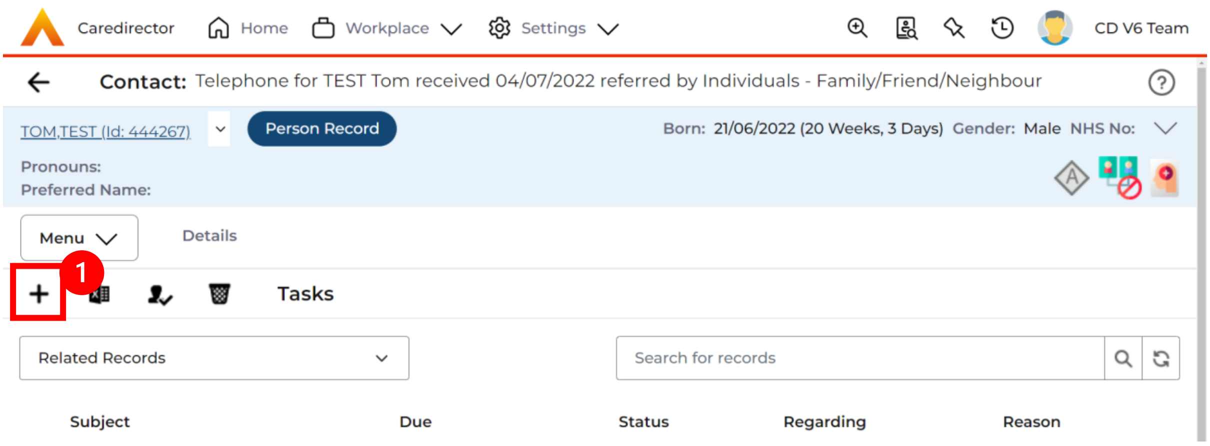


How to add an Activity to a Contact

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.

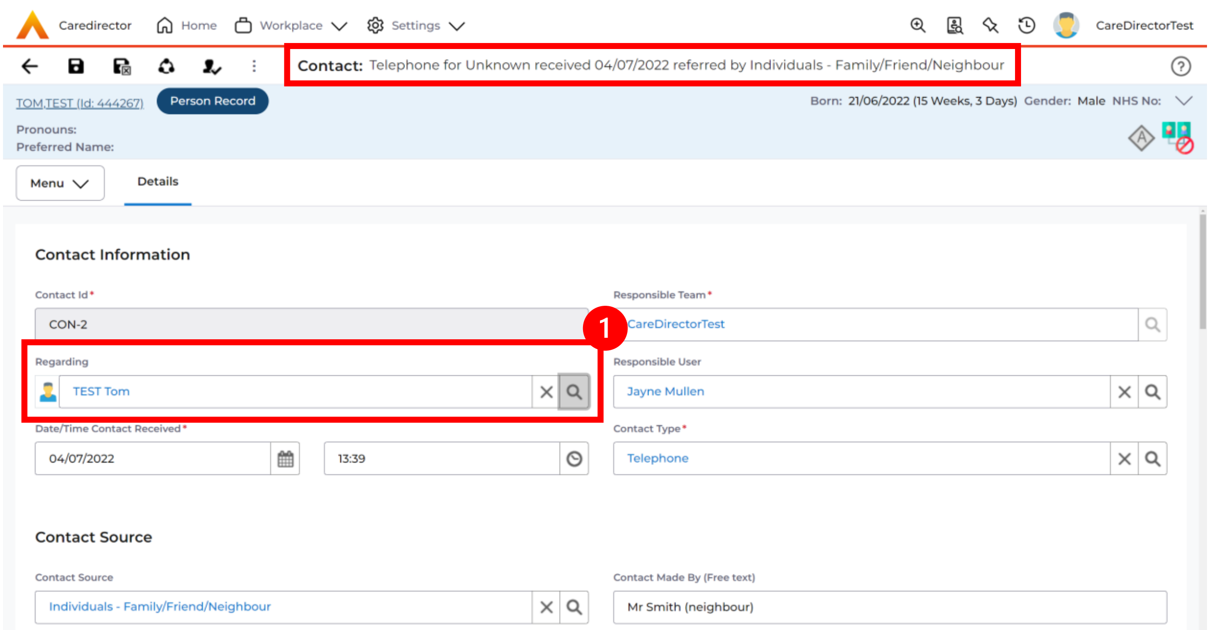


4. When finished, select **Save**.

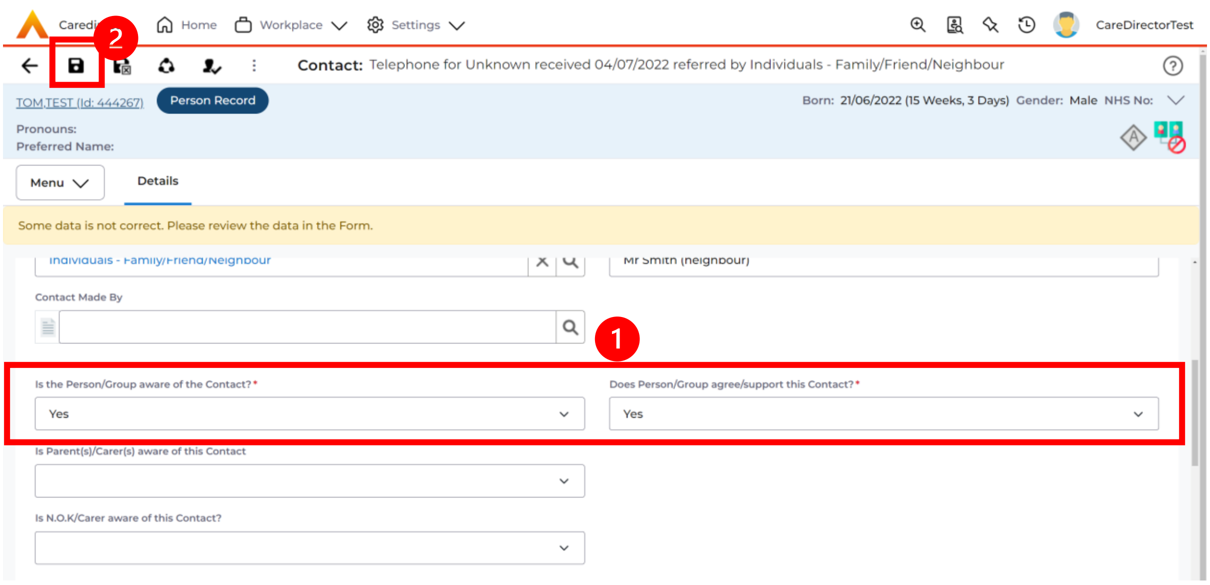
How to link a Contact to a Person Record

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

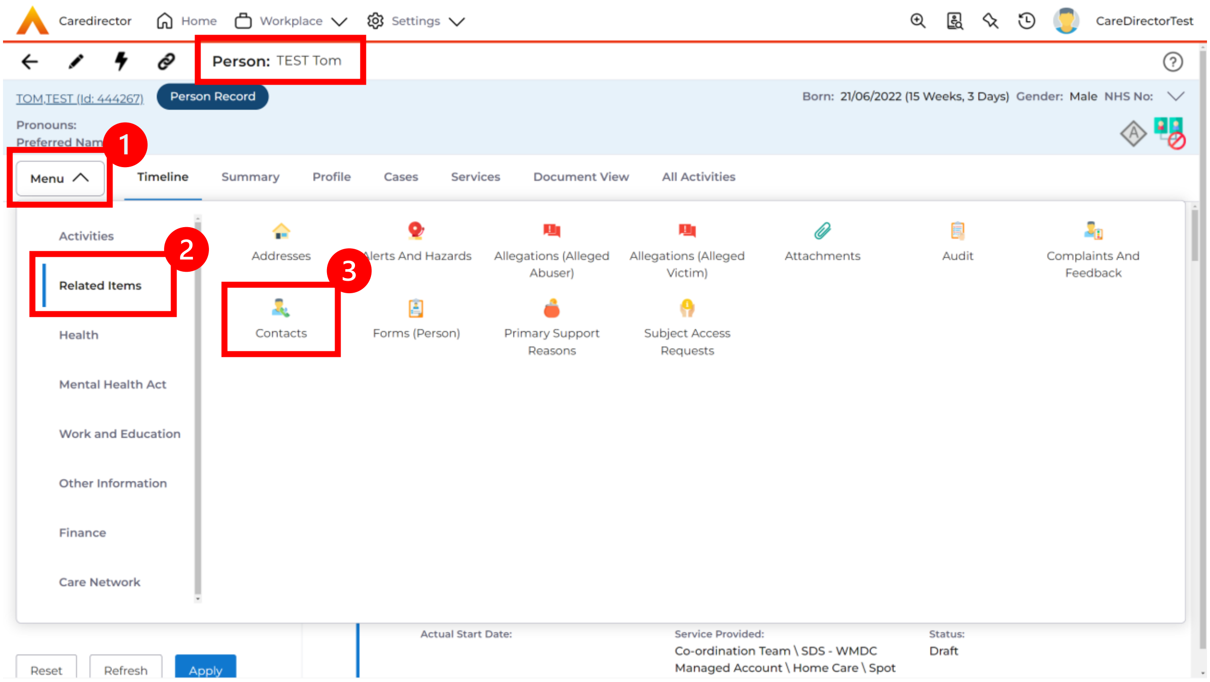
2. After the **Service User** has been created onto the system and the **Contact** is triaged. Locate the **Contact** and under **Regarding** find the created **Service User** using the **Lookup** function**.**



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.**



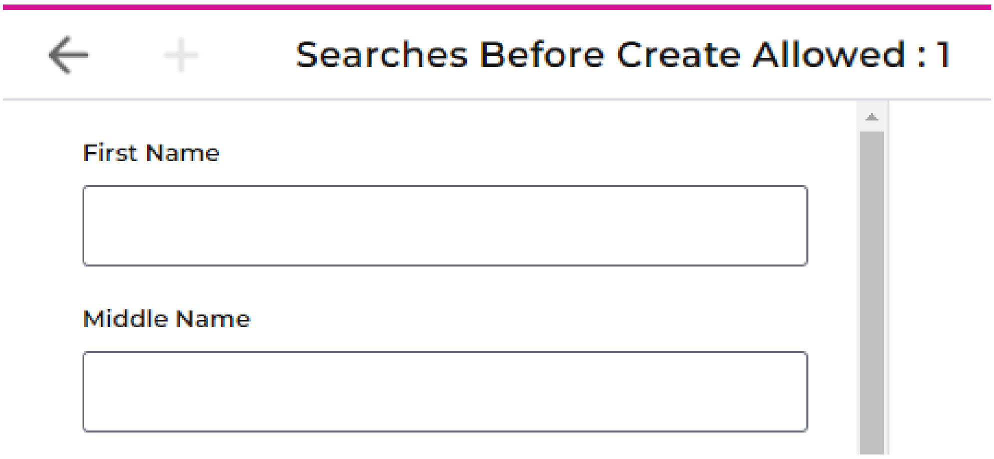
How to create a Person Record

Duplicate Detection

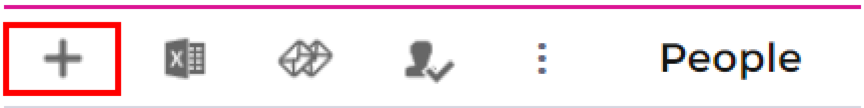
1. Before a **Person Record** can be created a **Person Search** must be done.

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.

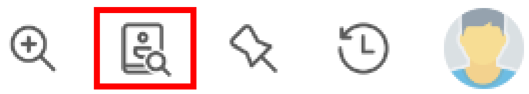


4. Select the **Created New Record** button and create a Person record.

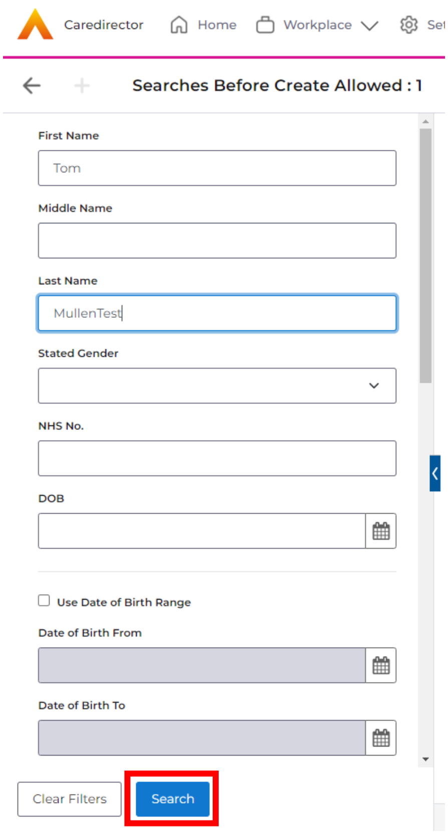


Adding a Person Record

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



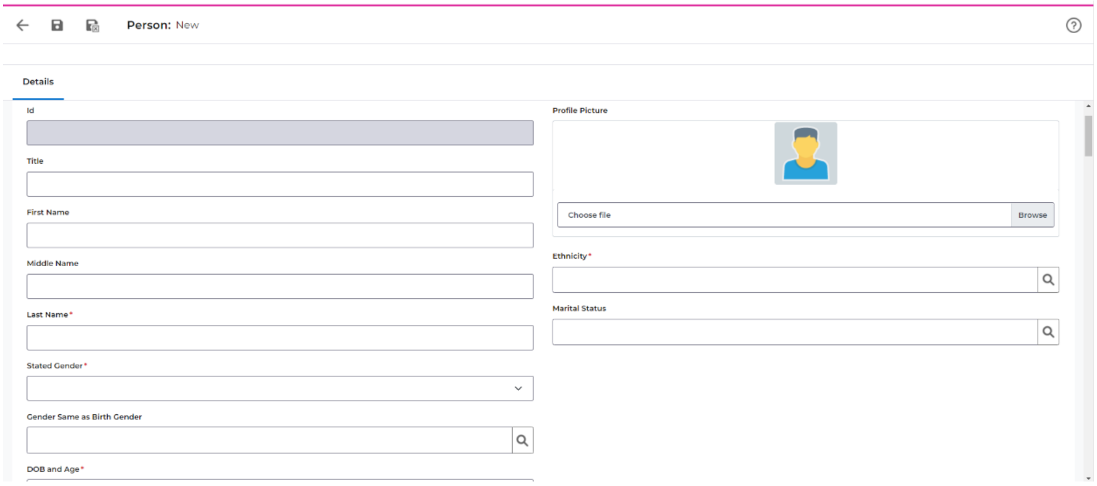
2. Search person to check for record.



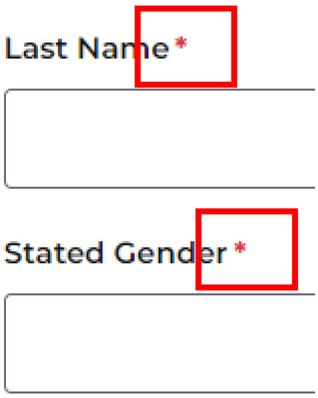
It is required of users to perform at least one search of an existing Person Records before they can create a new one.

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

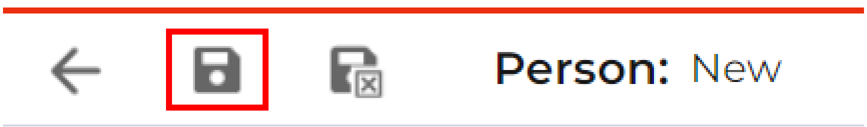
4. The Person: New record is displayed.



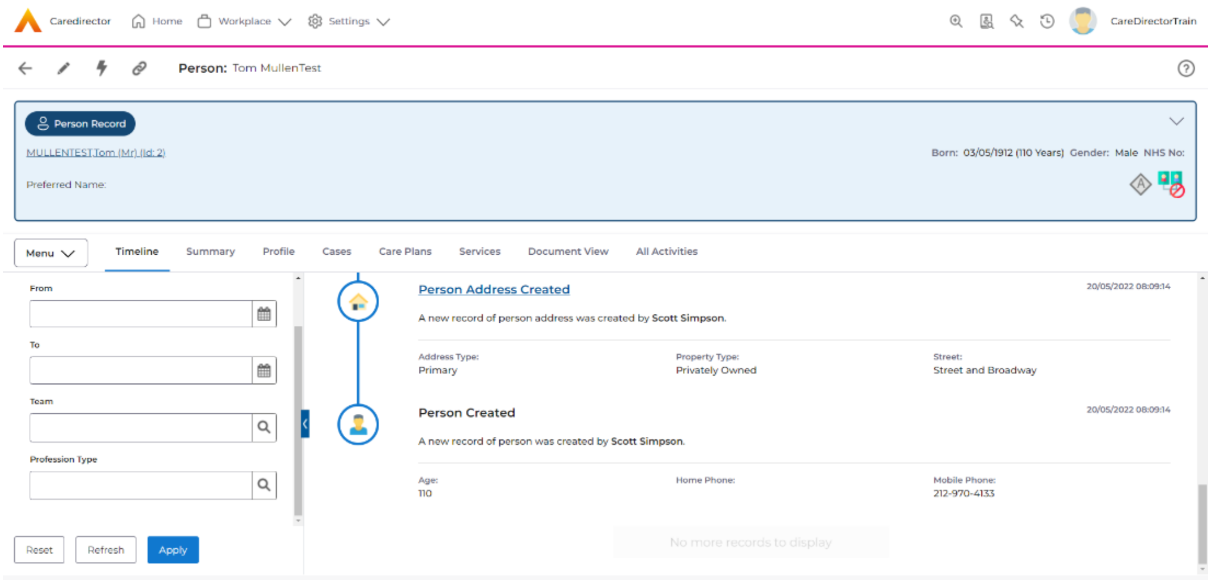
5. Complete the fields as required. Mandatory fields are marked with a red asterisk.



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

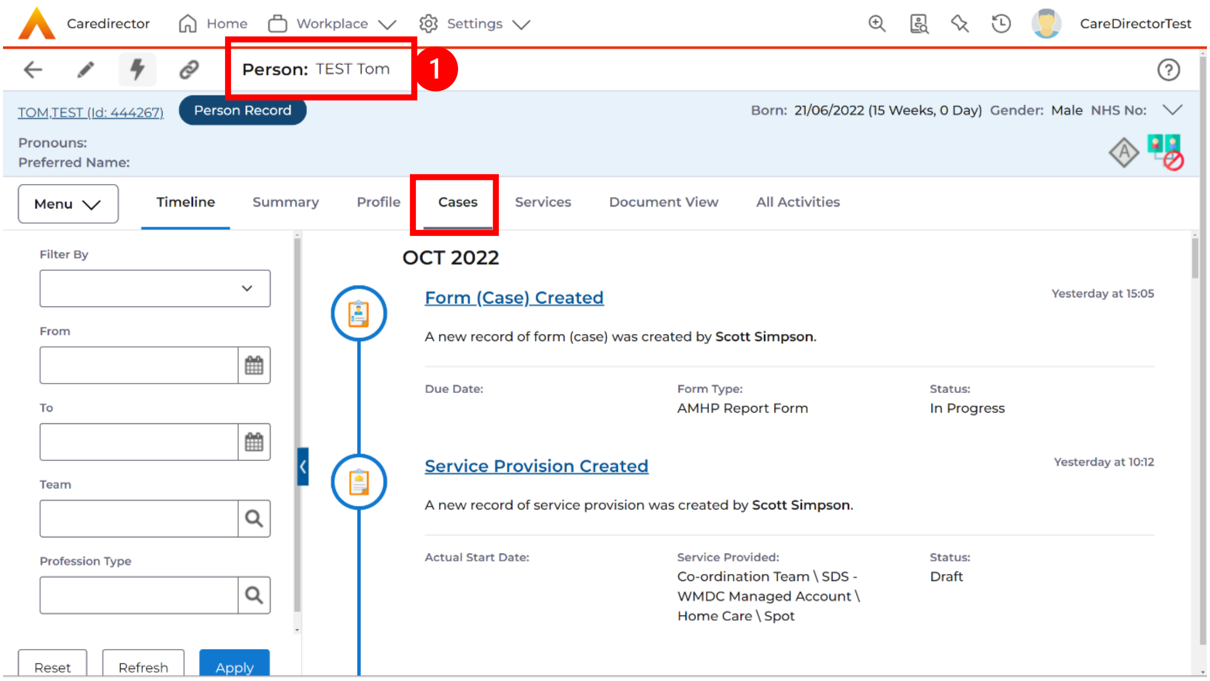


7. The **Person Record** will then be displayed.

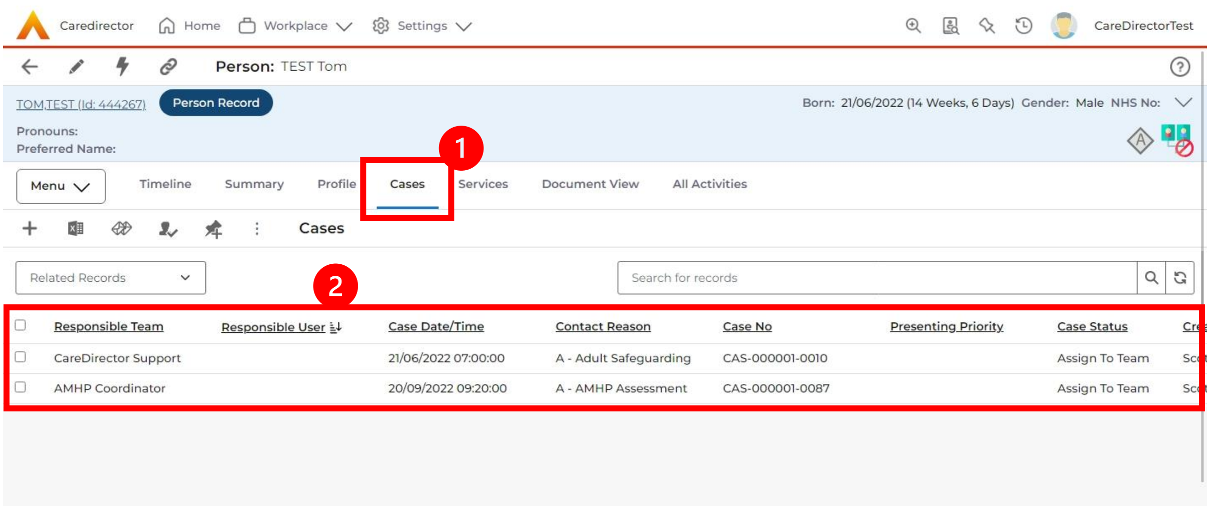


How to search for a Case

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

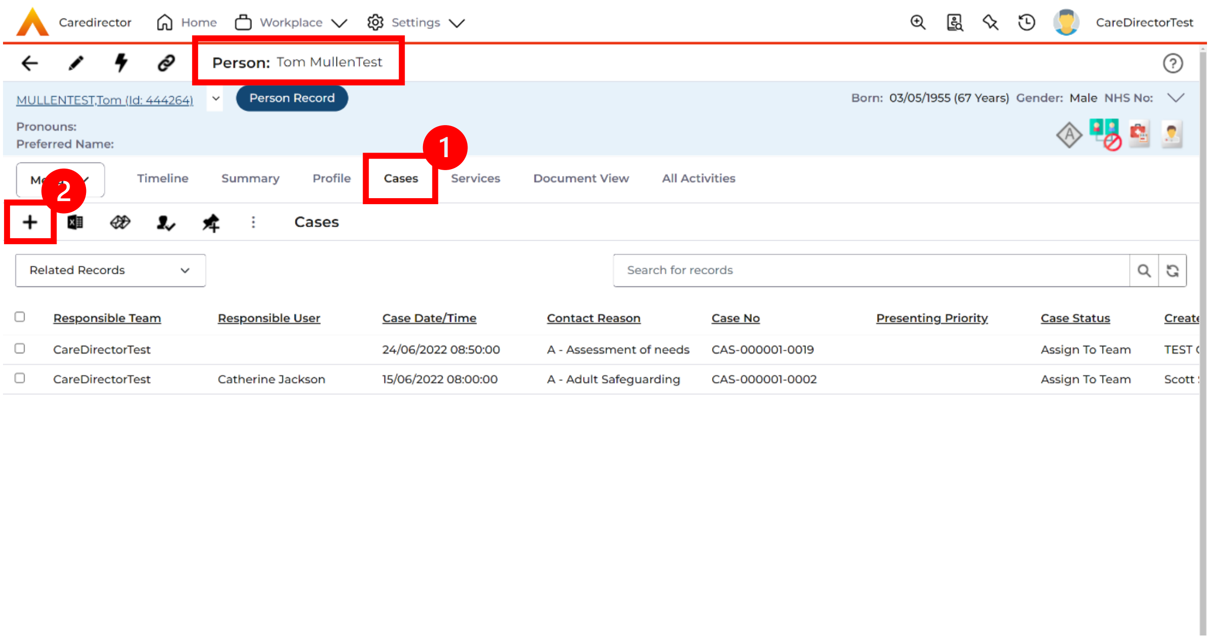


2. When found, select it to open the **Case Record**.

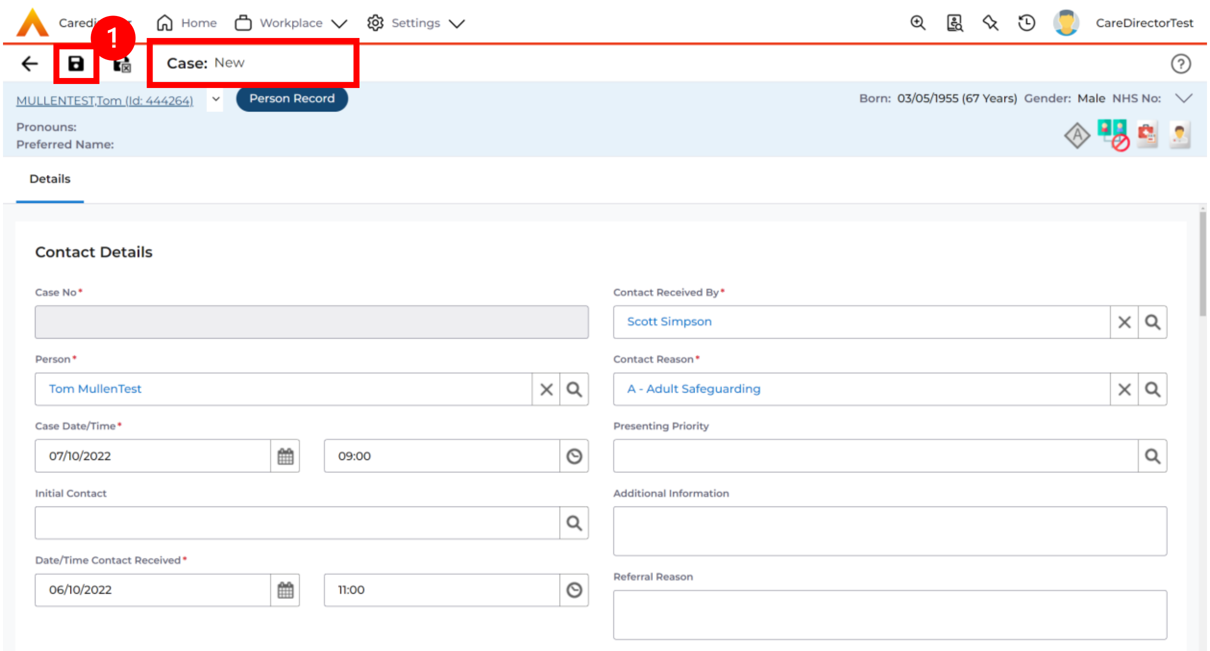


How to create a Case

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

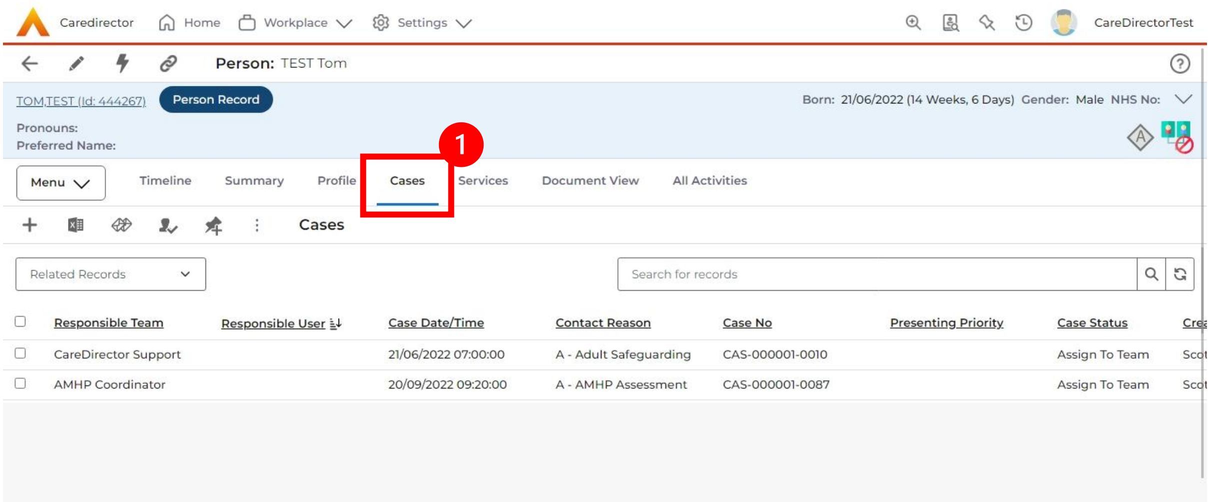


2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

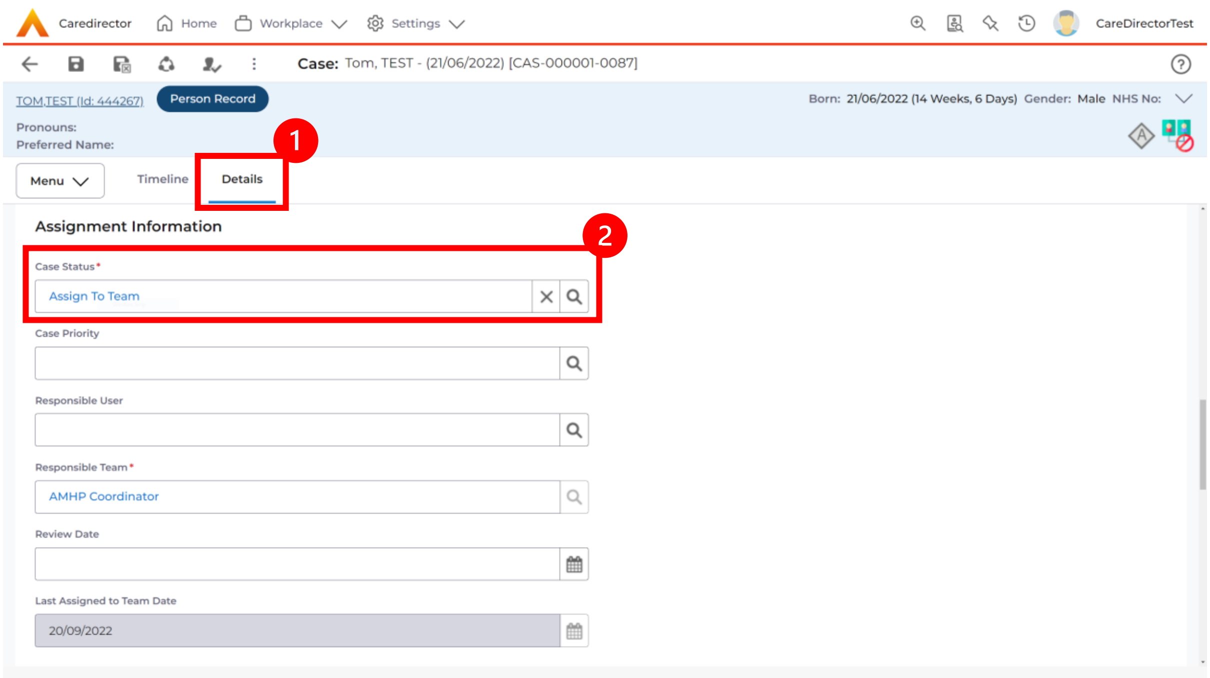


How to check the Case Status

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

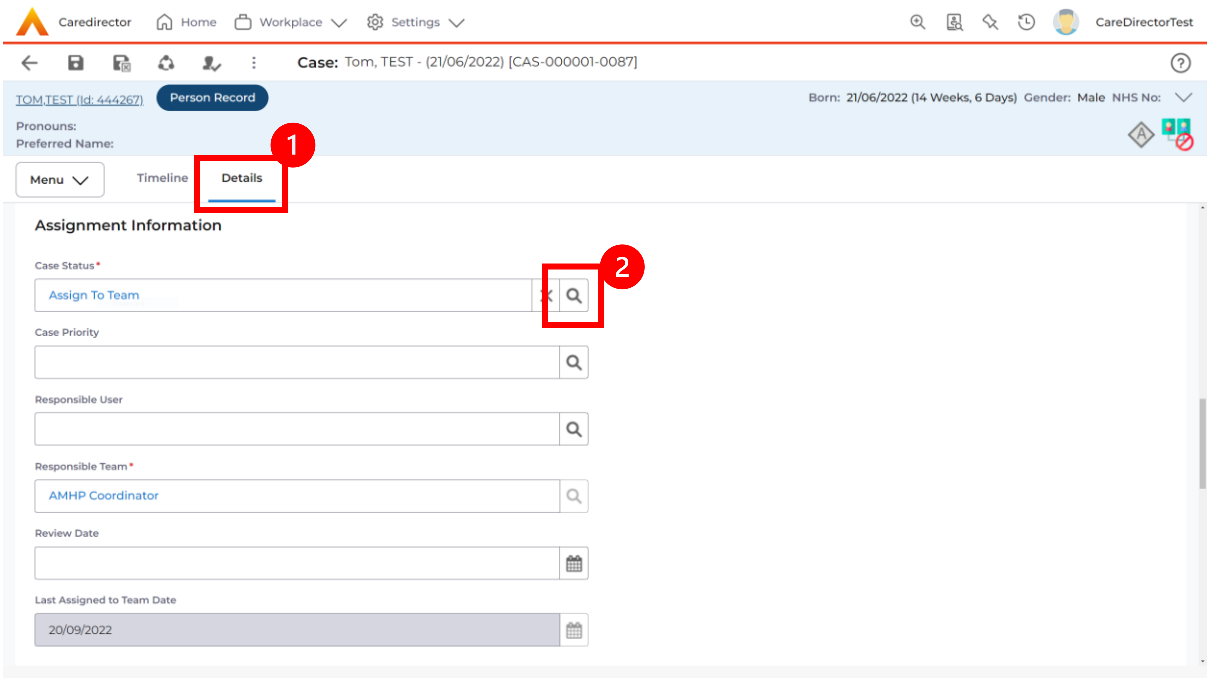


2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case** is **Allocated, Closed Under Review, etc.**

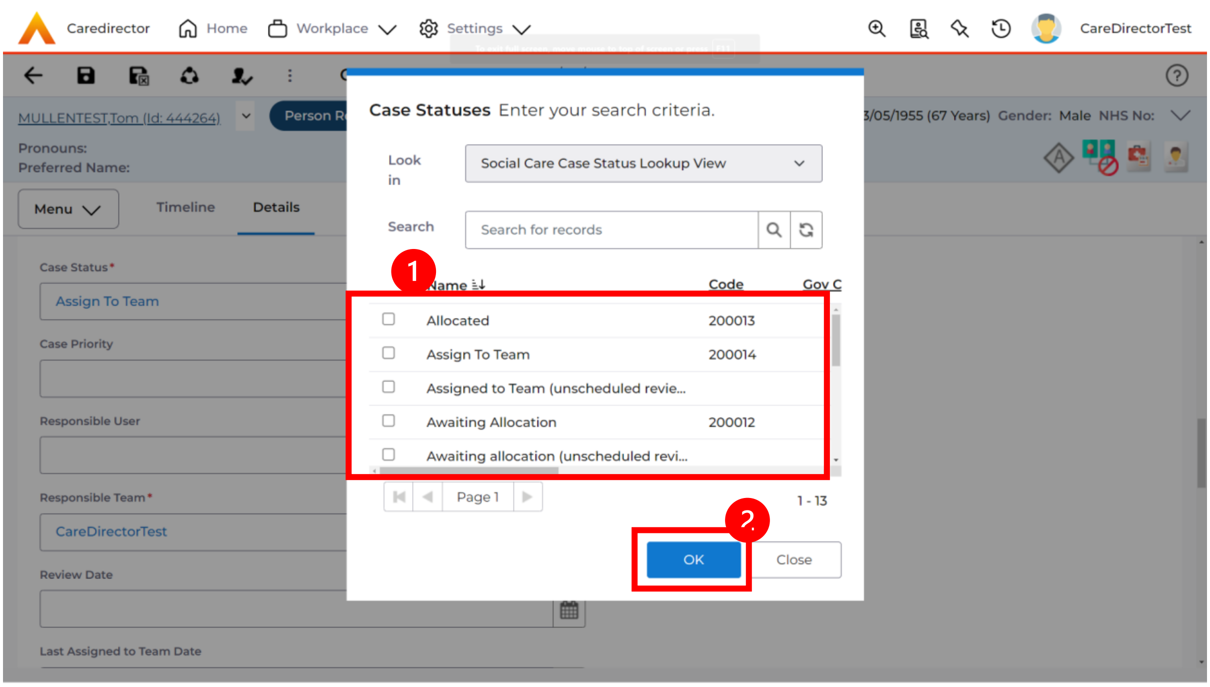


How to change the Case Status

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



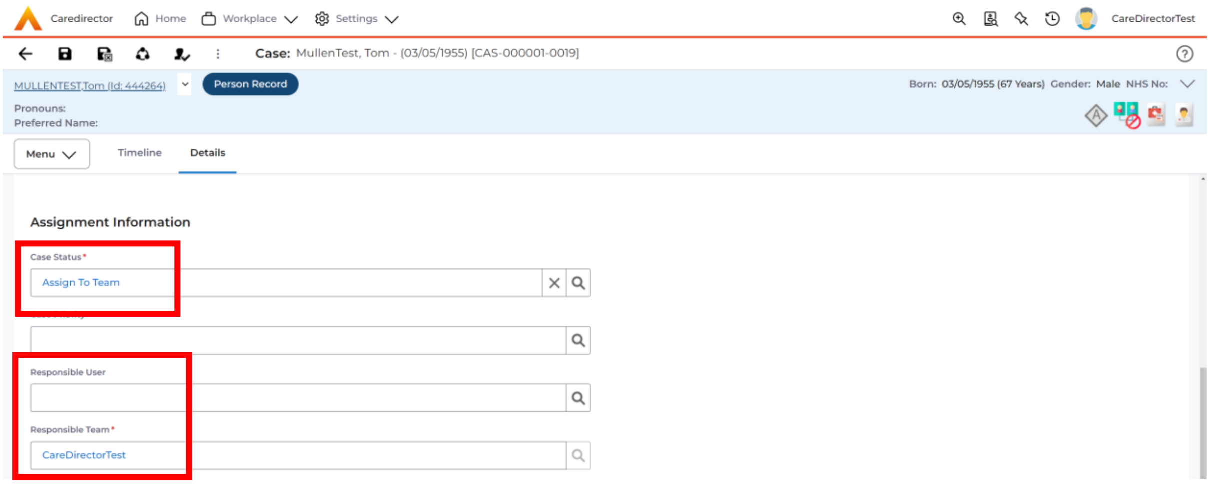
2. Choose the relevant option and select **OK** when found. Select **Save.**



How to Allocate a Case to a Worker

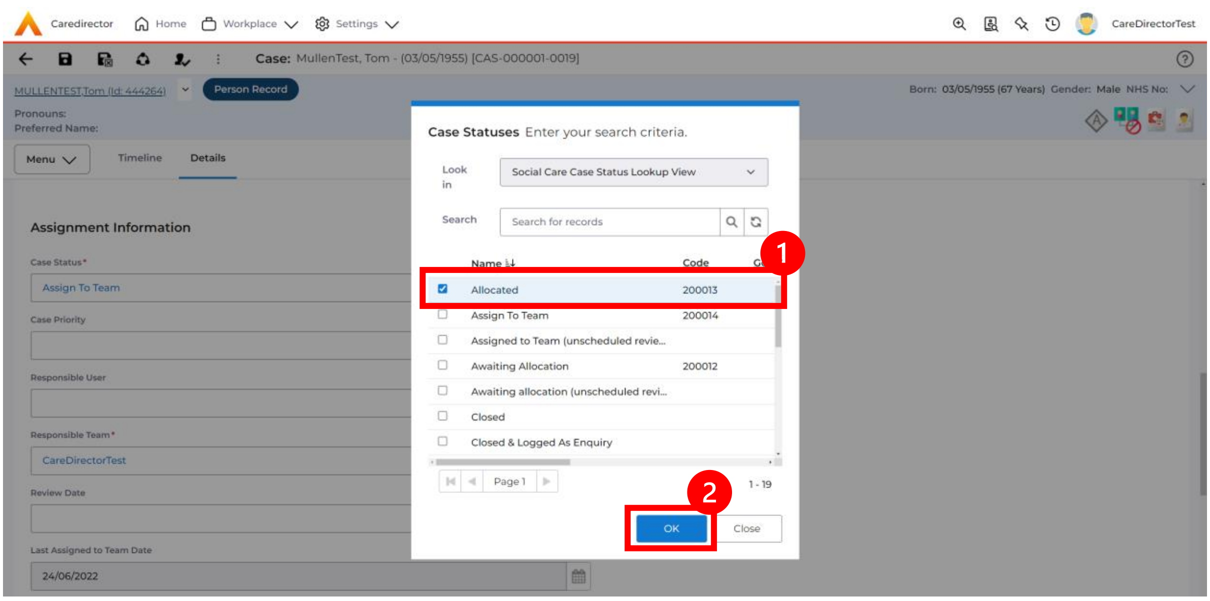
1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route.**

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

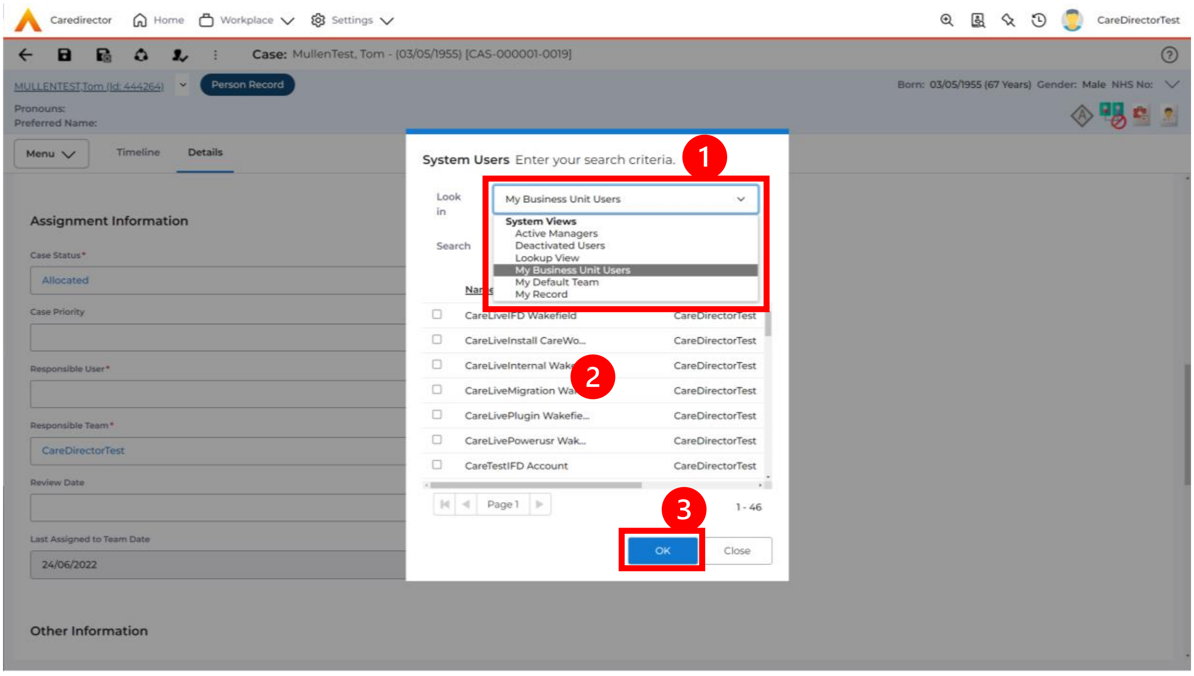


3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.

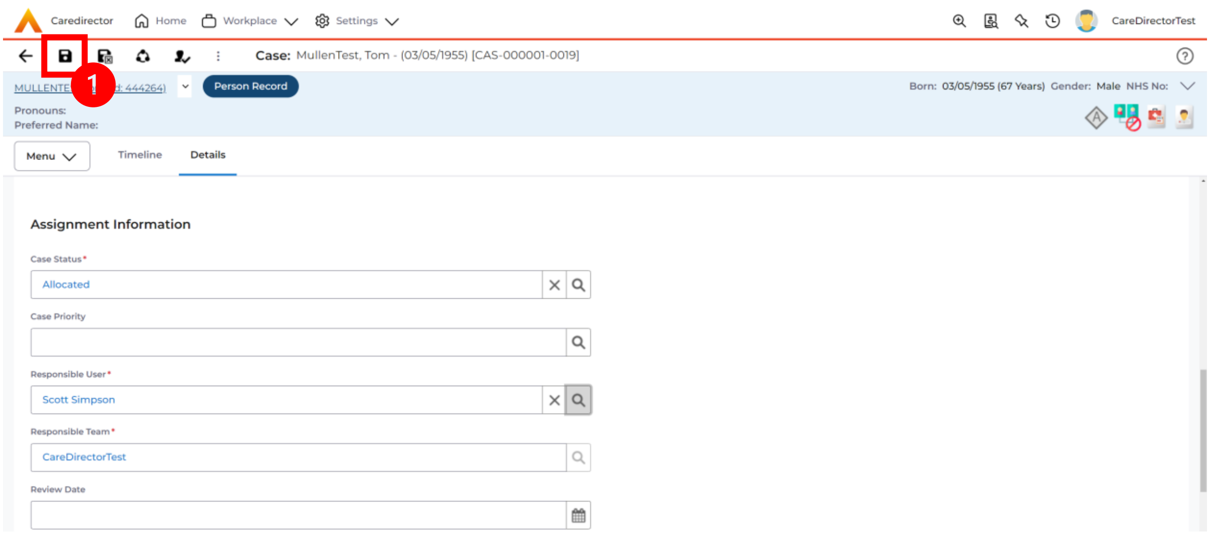
4. First select the **Lookup function** on the **Case Status** field and select **Allocate**. Then select **OK**.



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.**

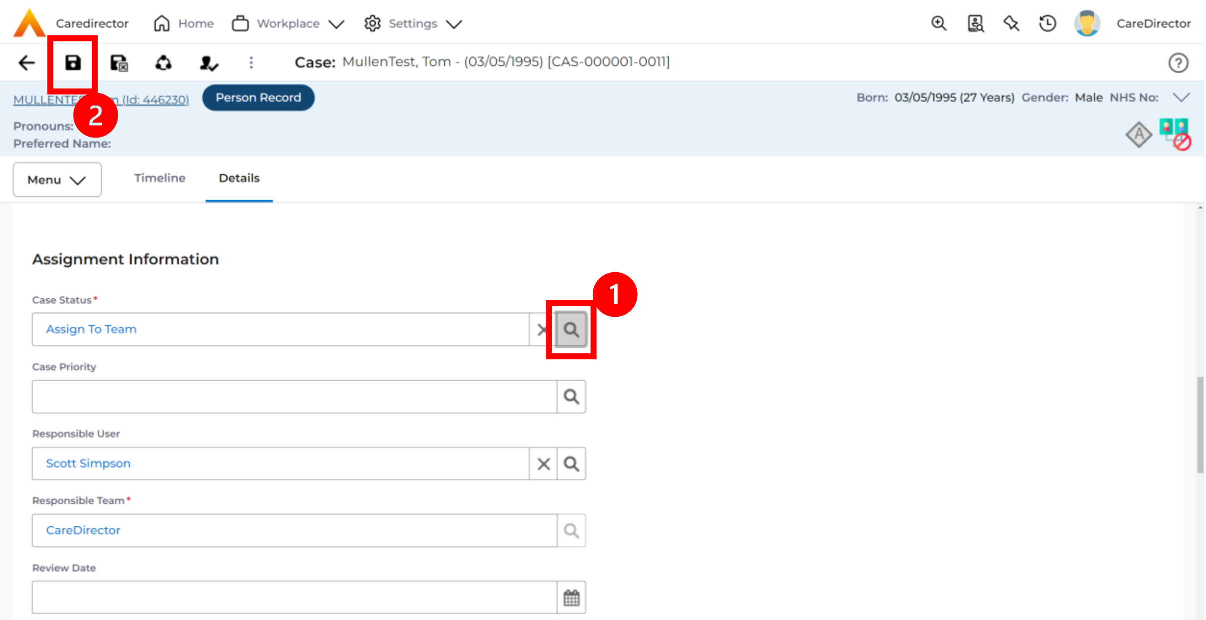


How to send a Case to another team

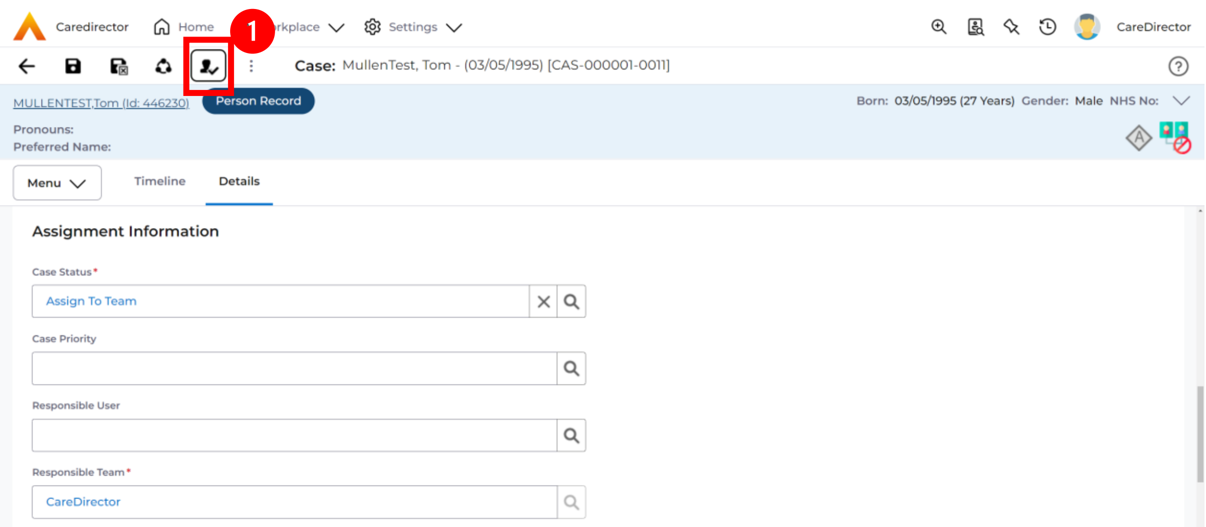
1. There may be reasons that a **Case** needs to be sent to another team.

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**.

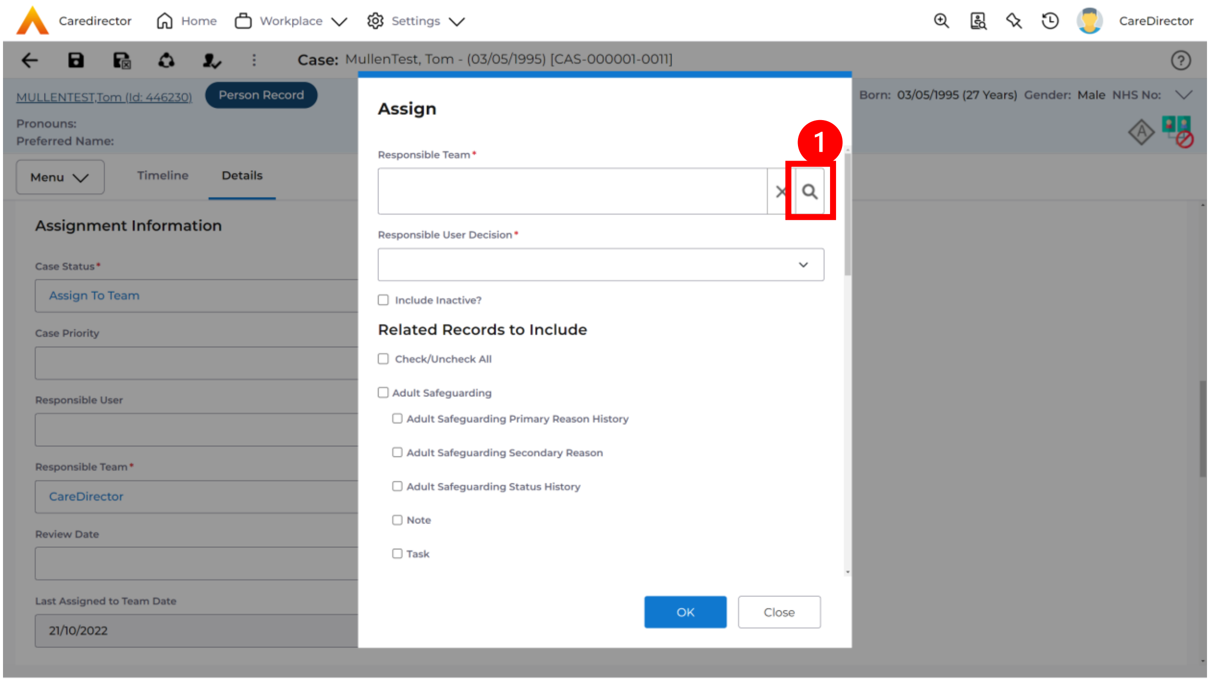
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save.**



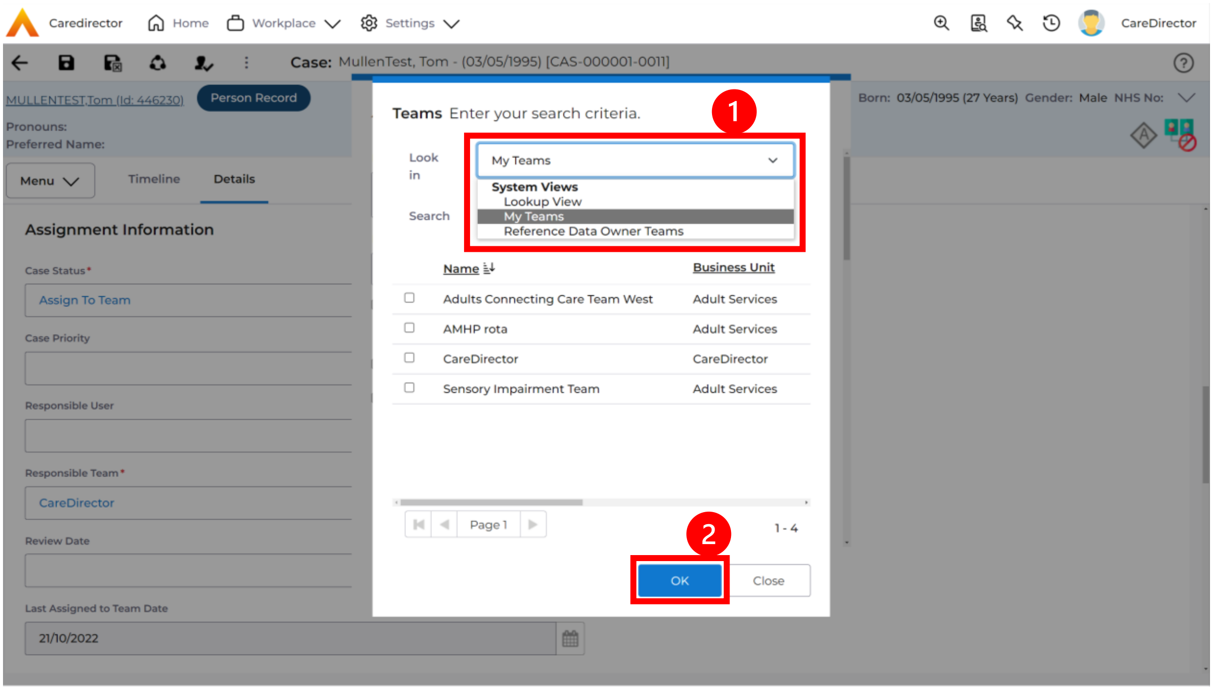
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.



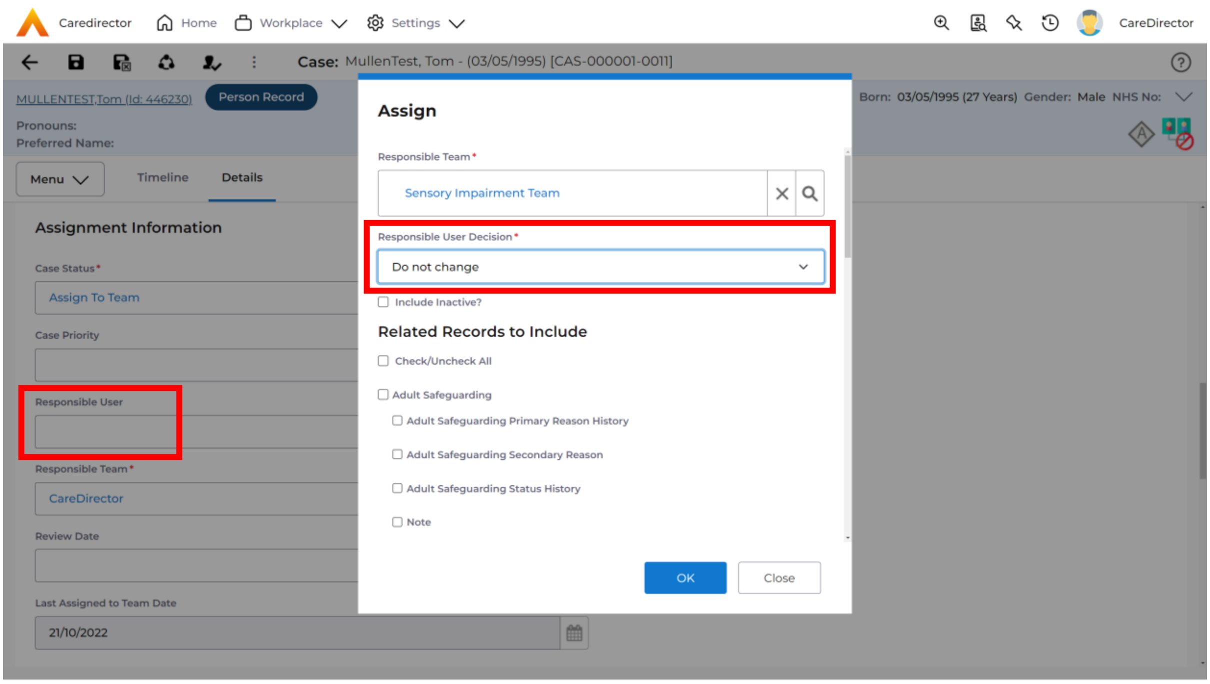
5. This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup function.**



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.**

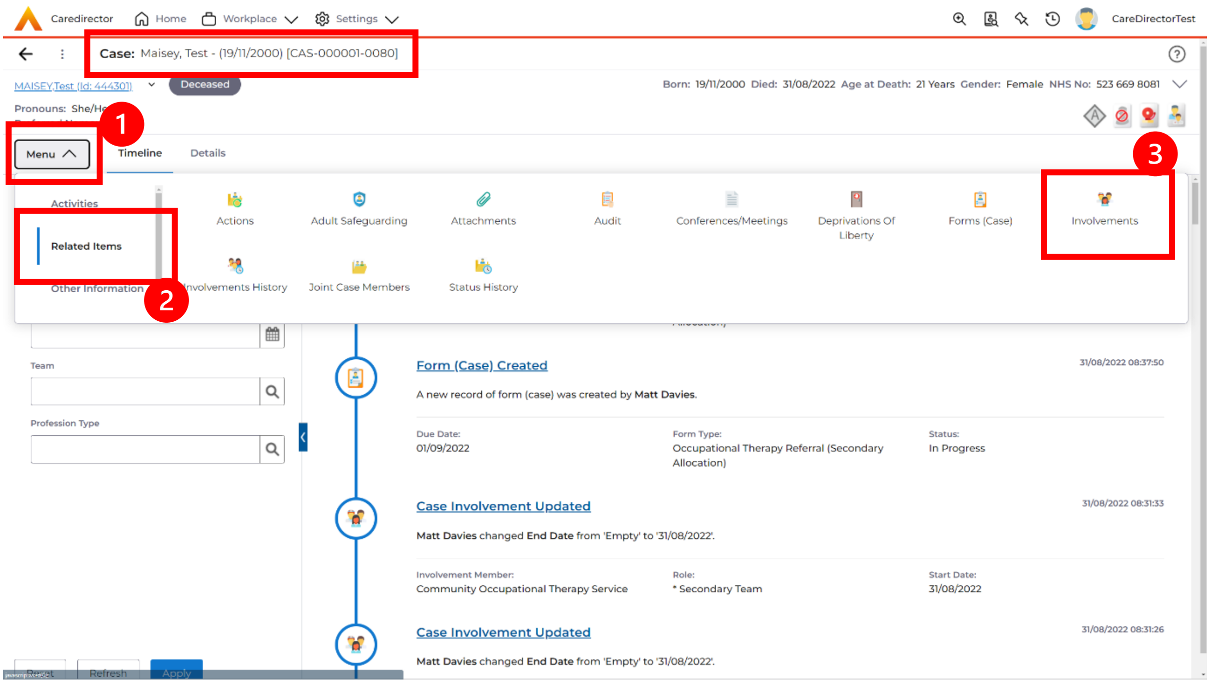


8. When finished, select **OK.** It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

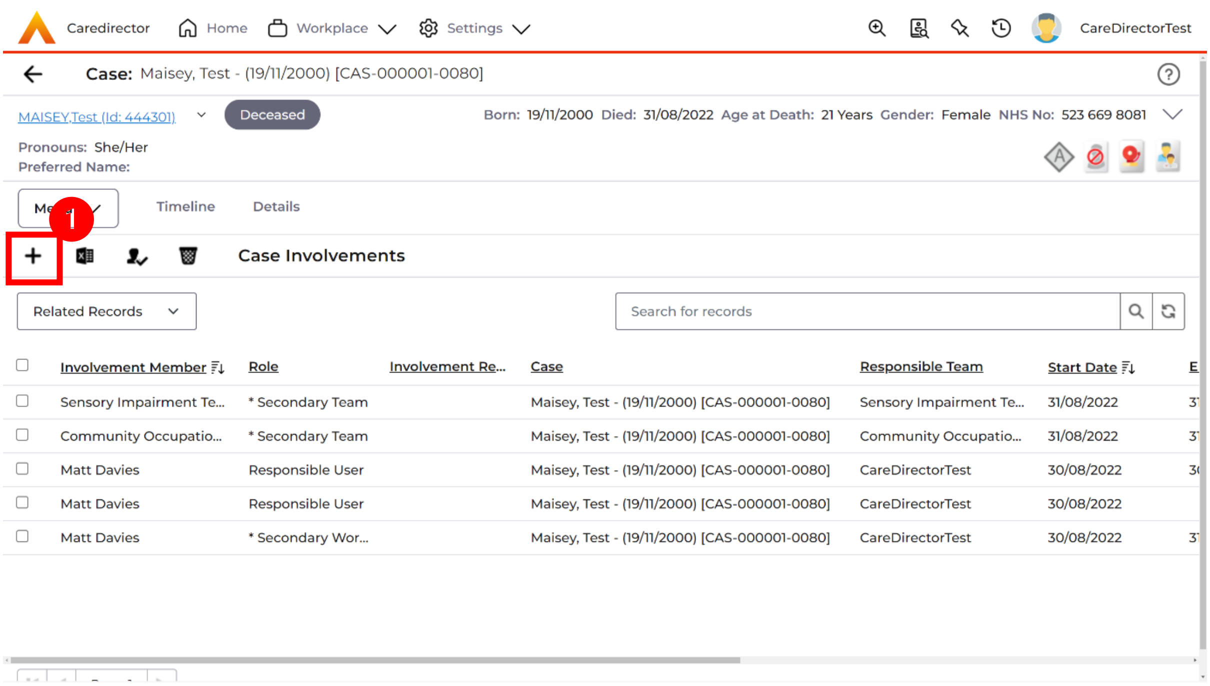
How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.

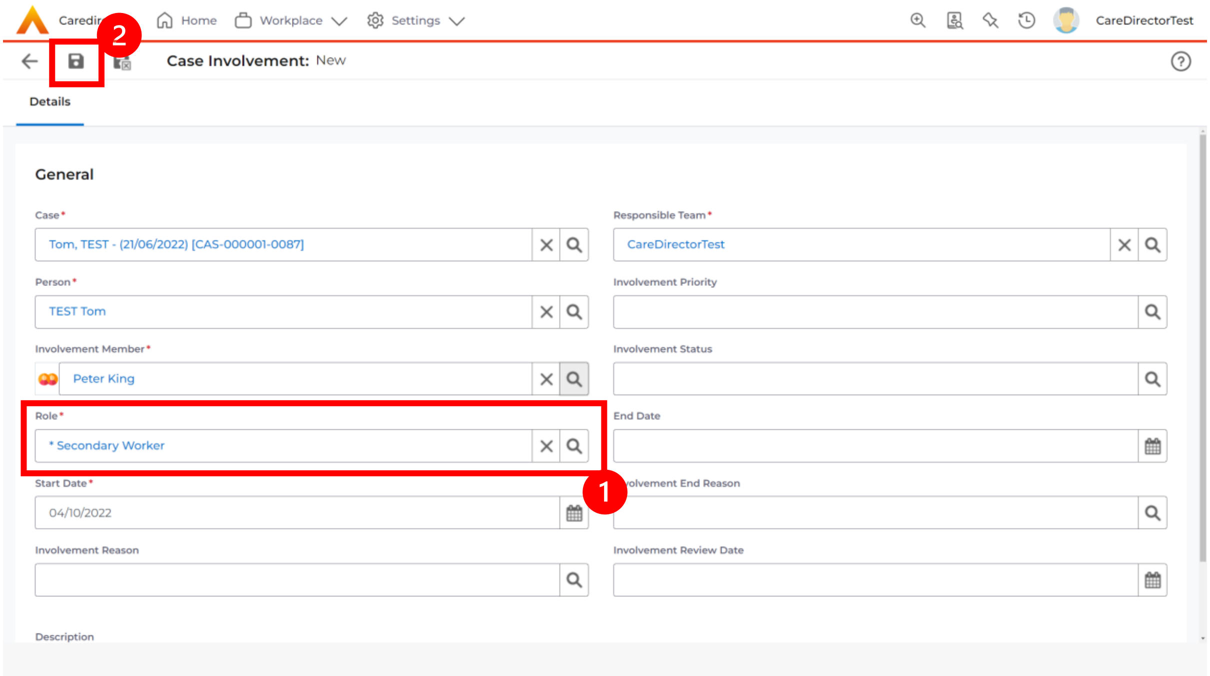
2. Select **Menu, Care Network** select **Involvements.**



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

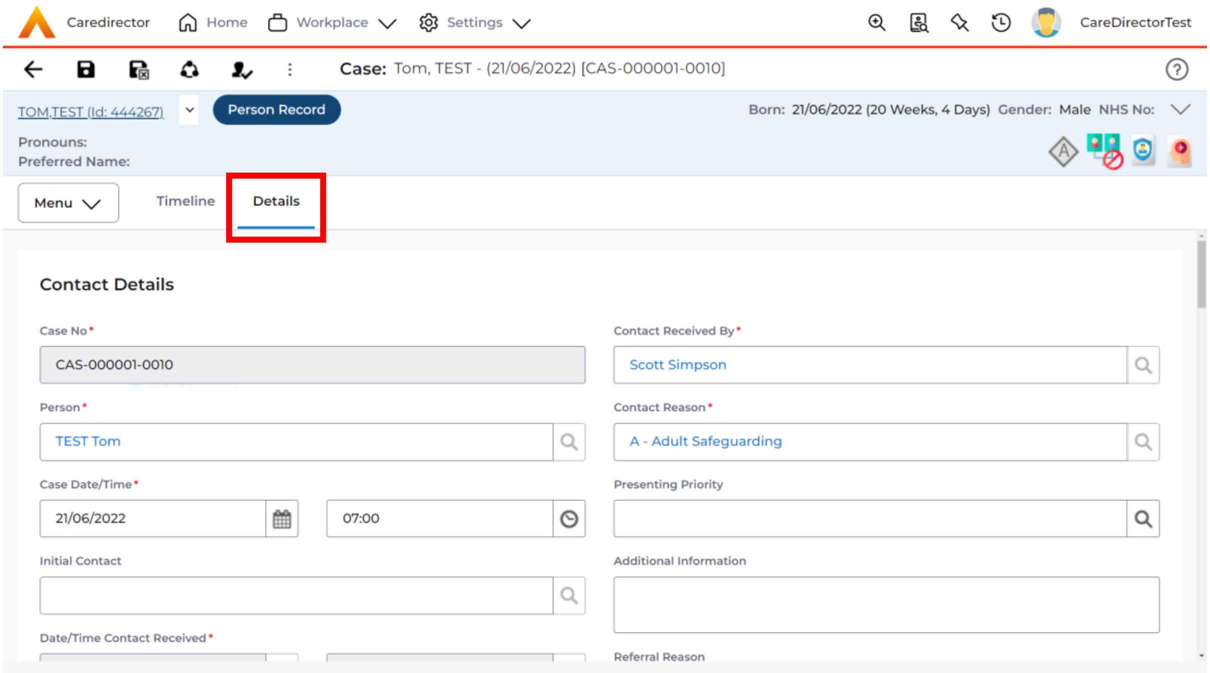


4. Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save.**

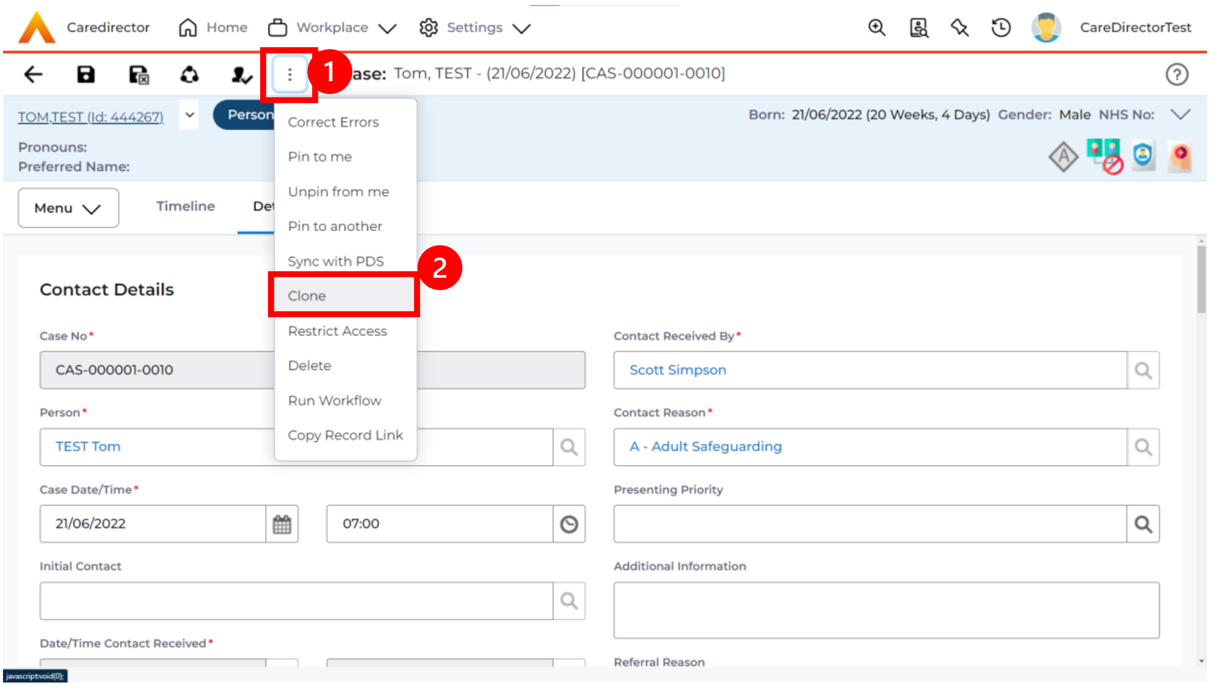


How to clone a Case

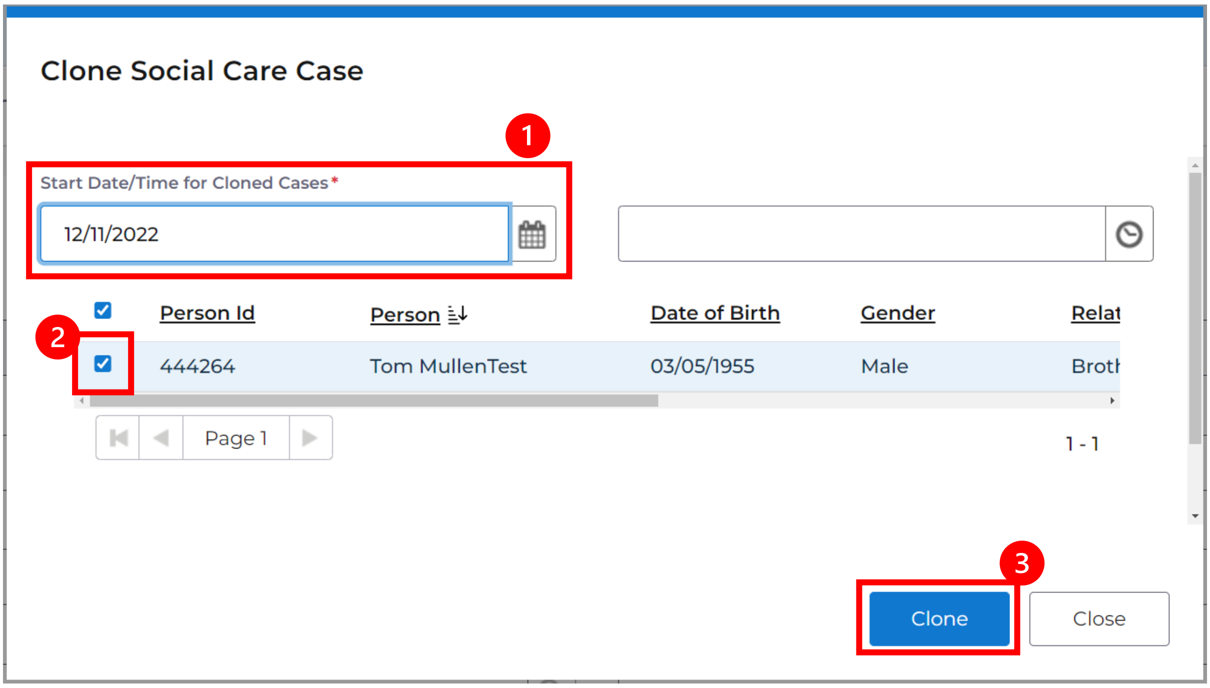
1. Locate the **Case** you want to **Clone**. Select **Details** tab.



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

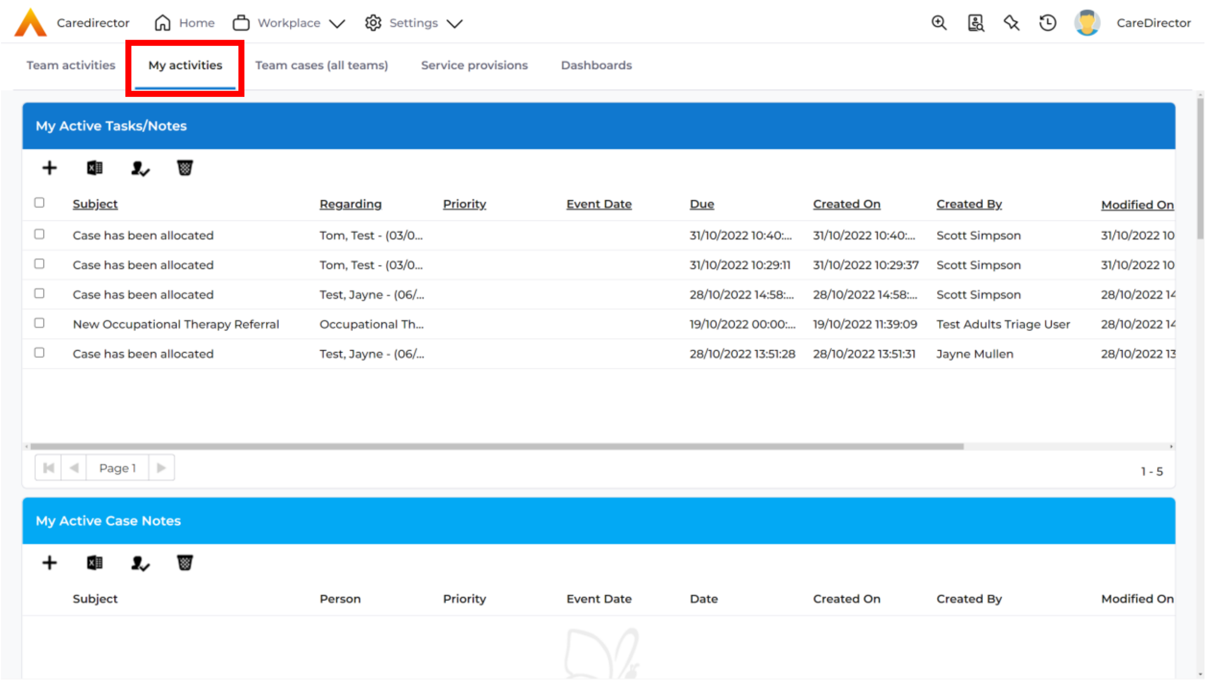


3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone.**

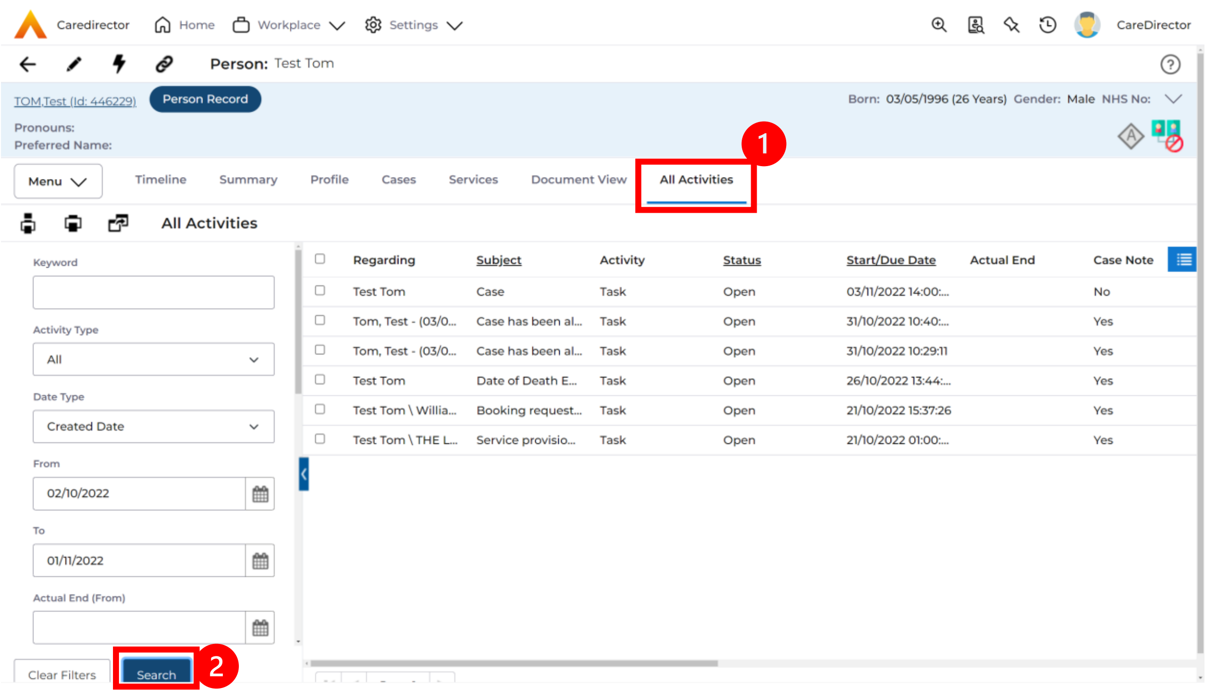


How to find Activities

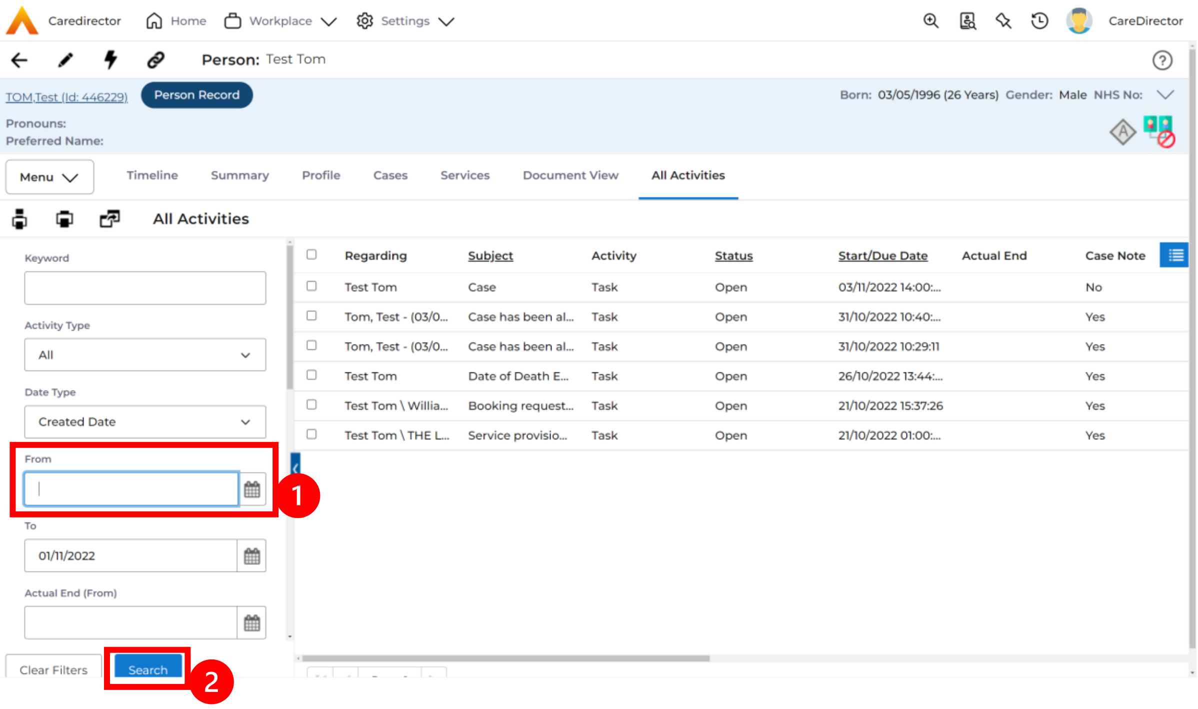
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



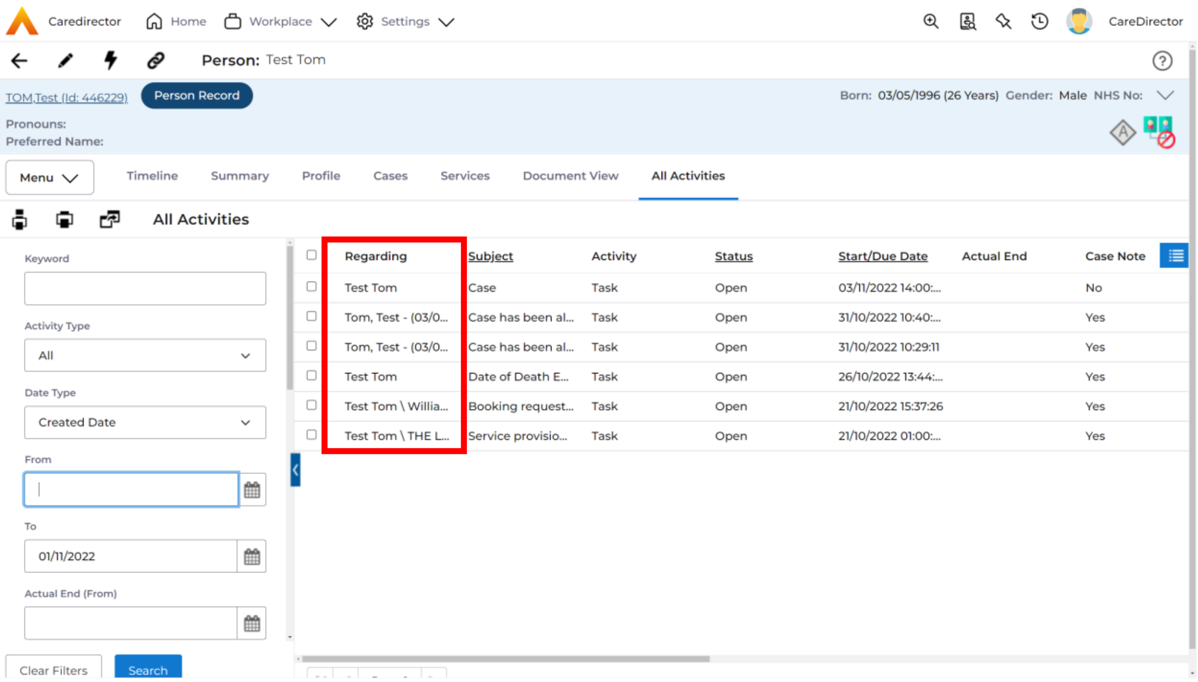
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



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.

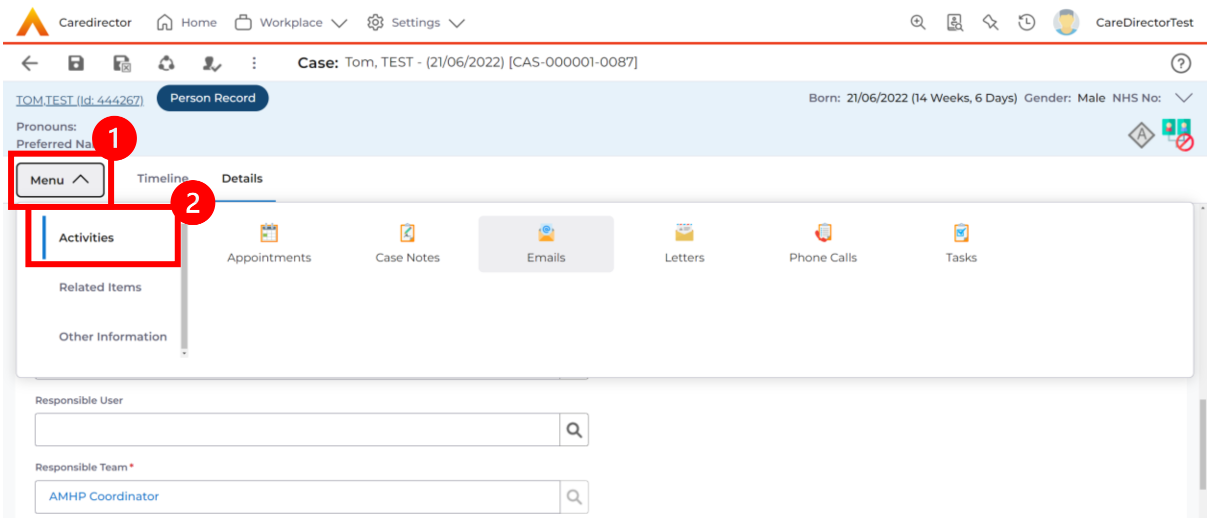


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

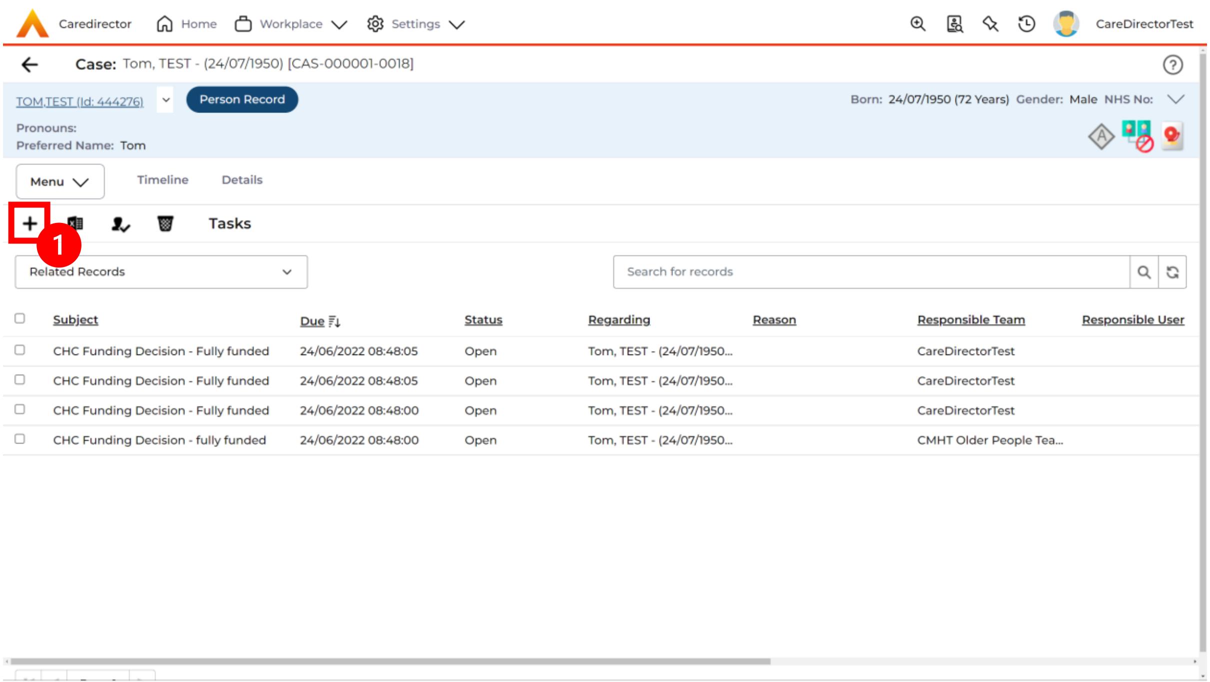


How to input an Activity

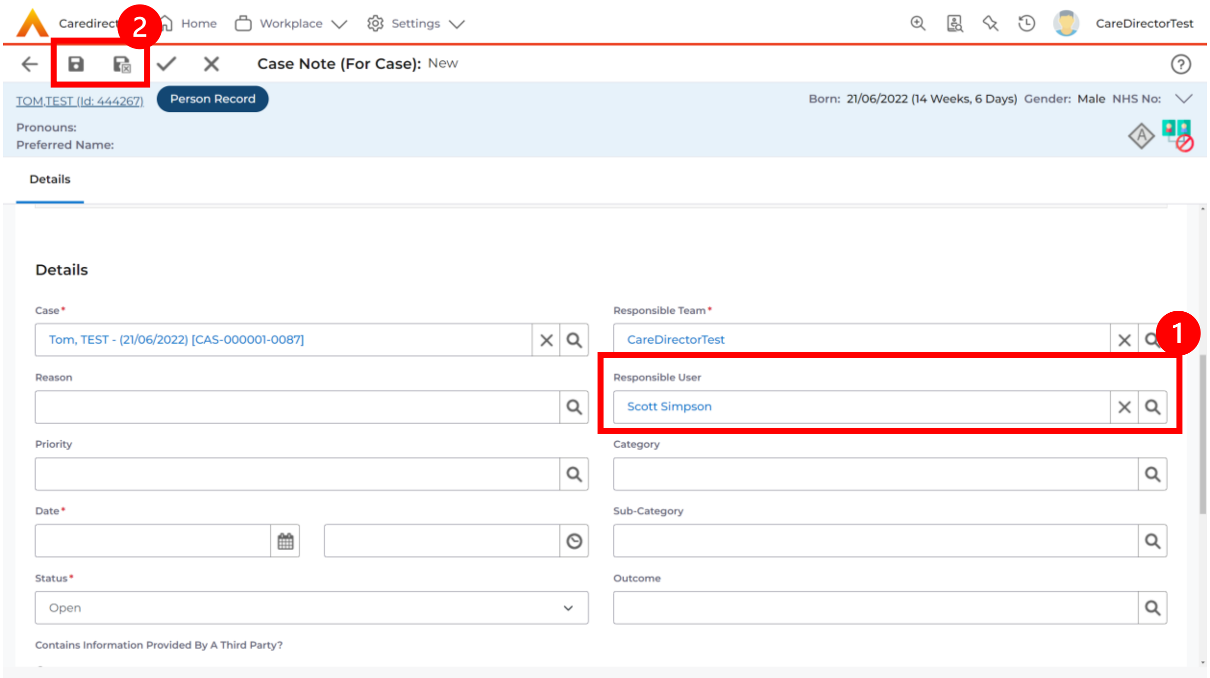
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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**.

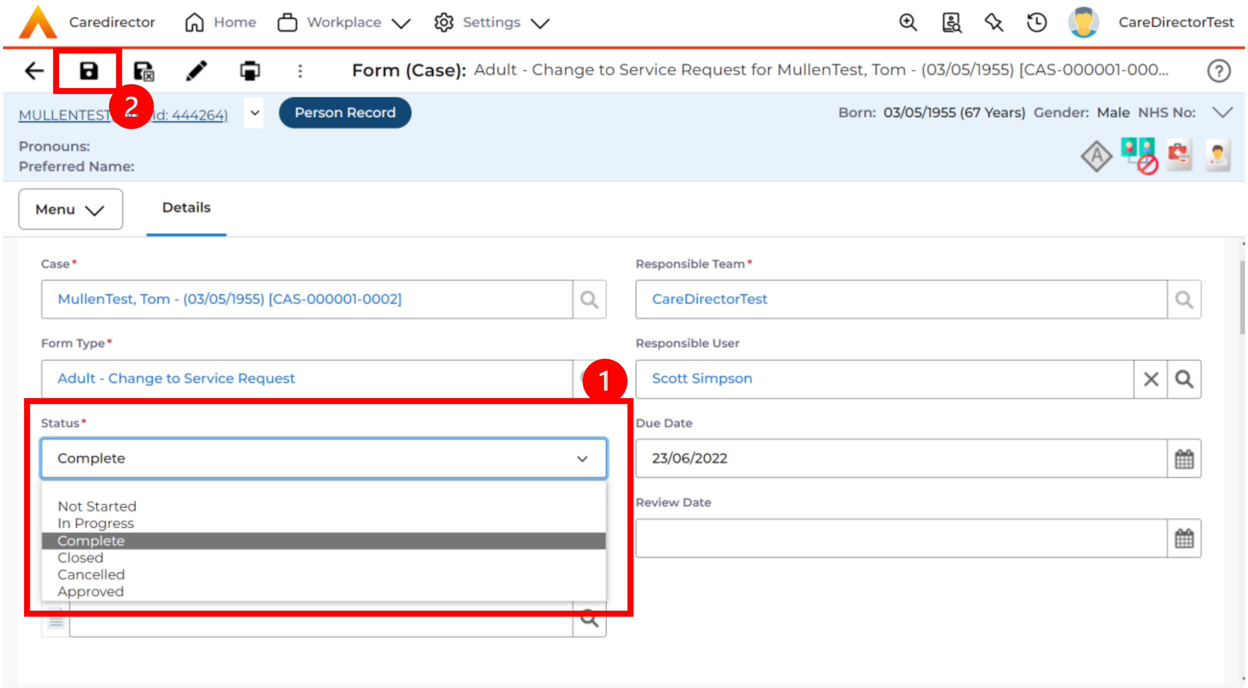


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

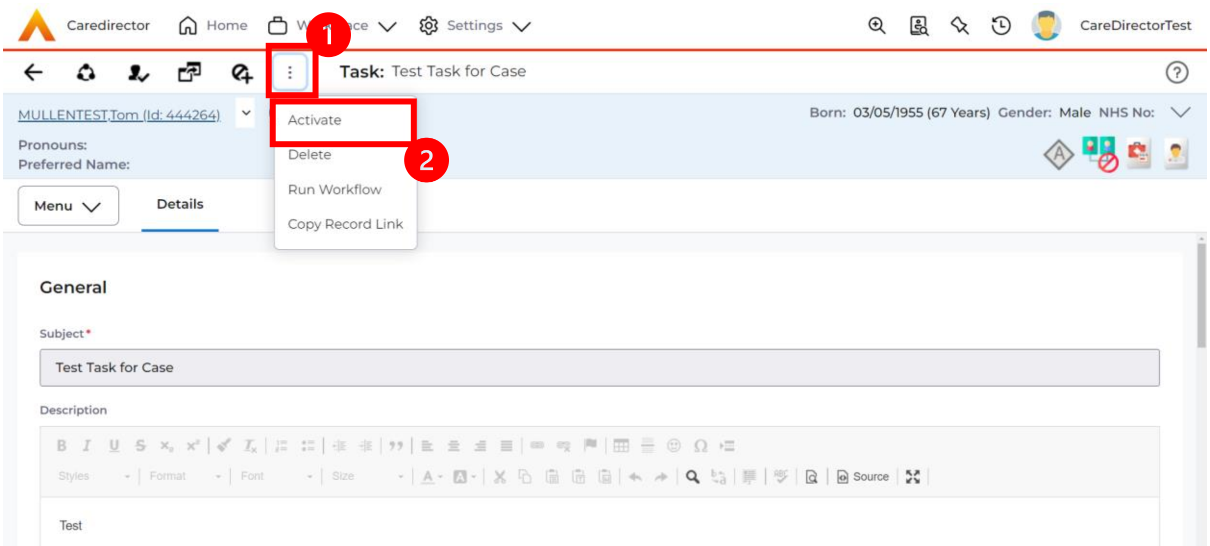
How to change status to Complete (Re-activate Activities)

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.**

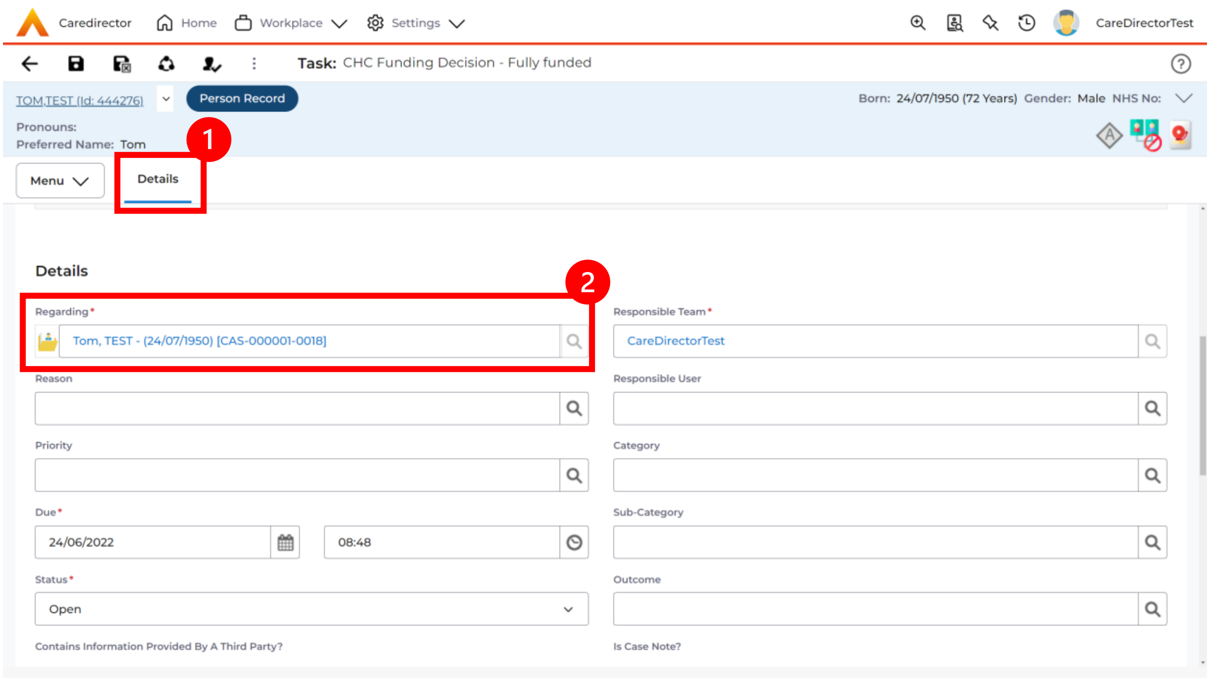


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

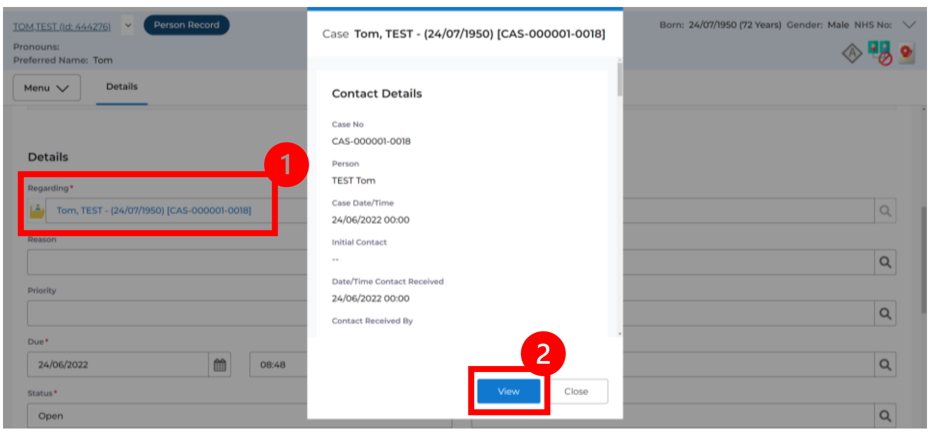
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



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

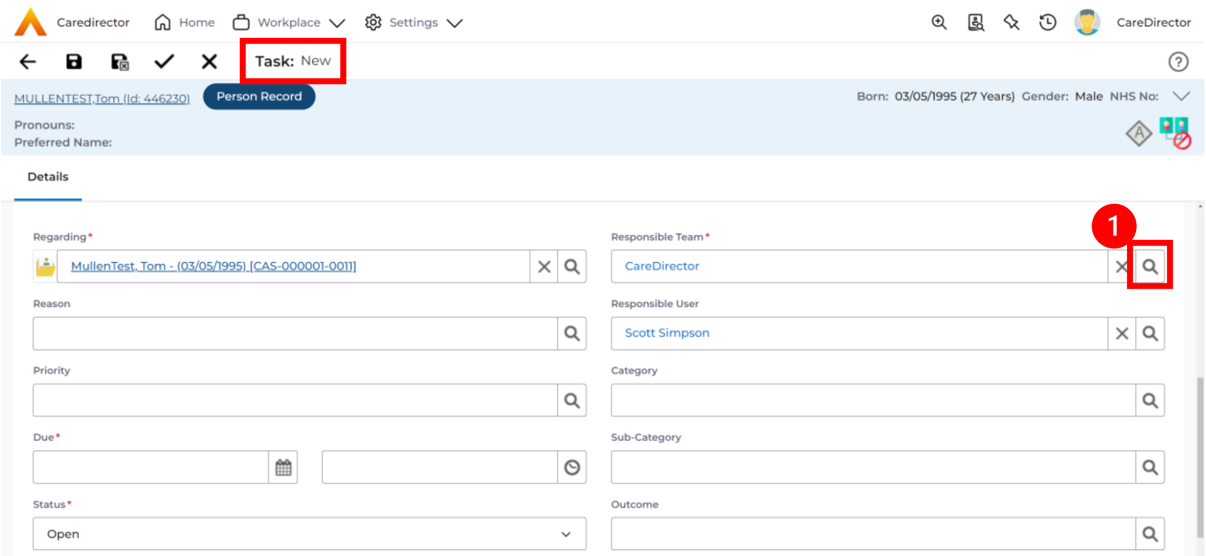
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

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.**

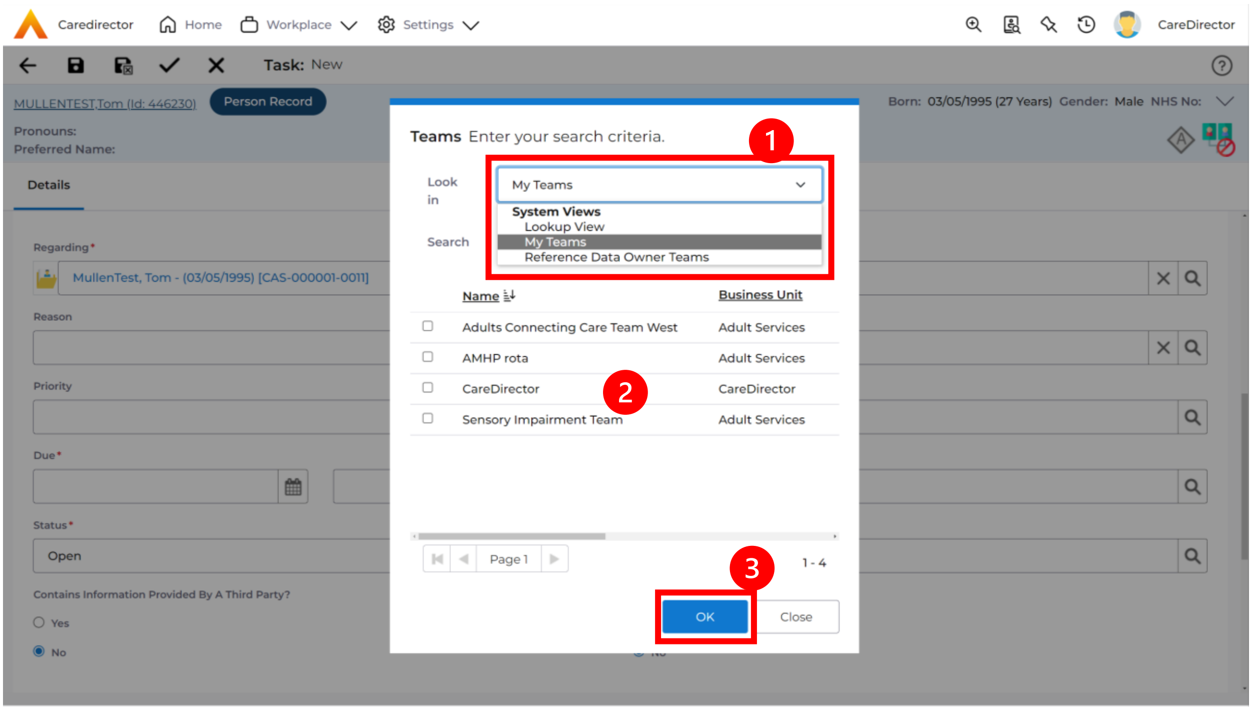


How to Allocate a new Activity to another team

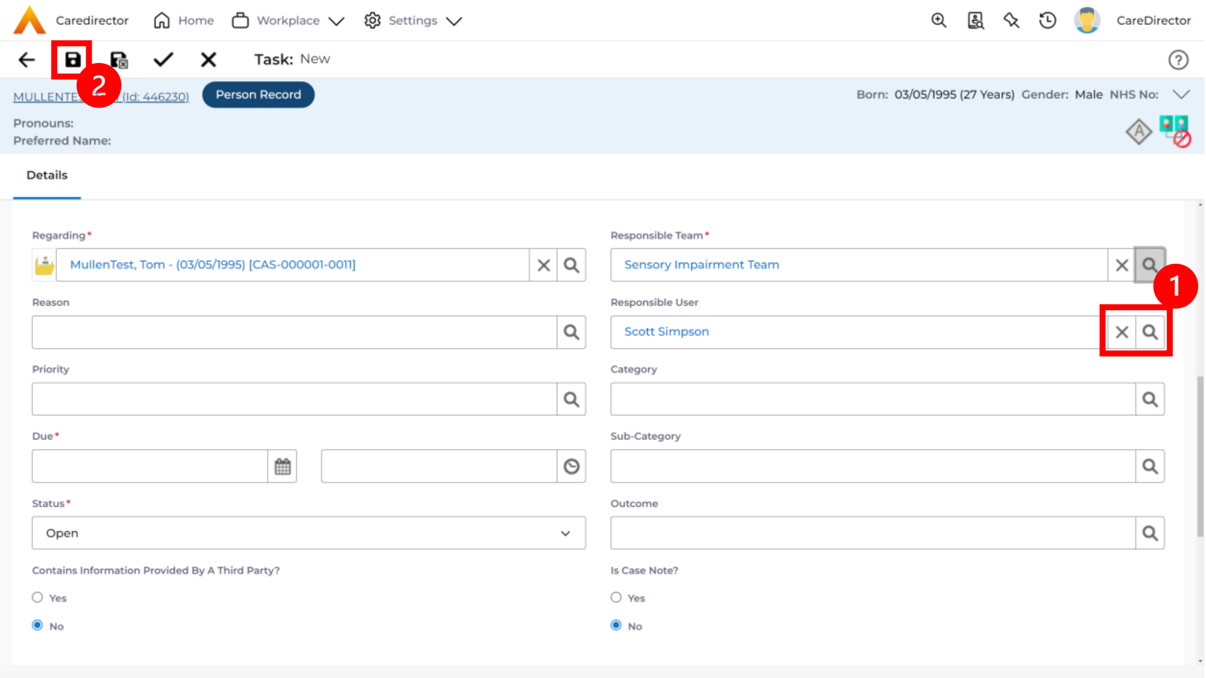
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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.**

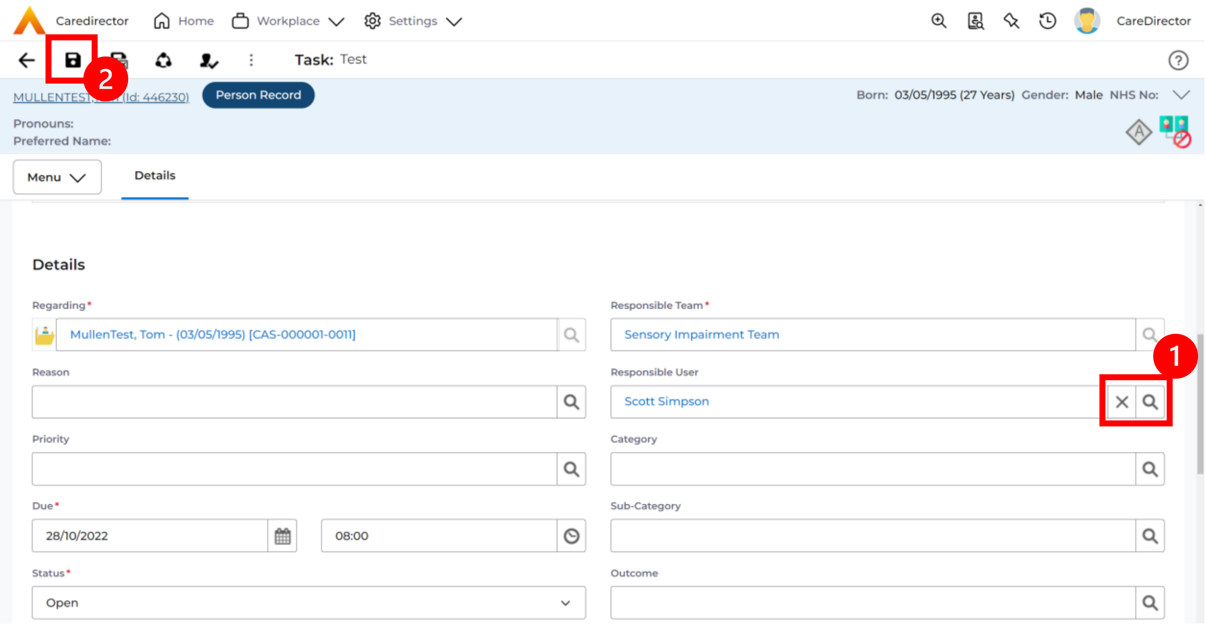


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

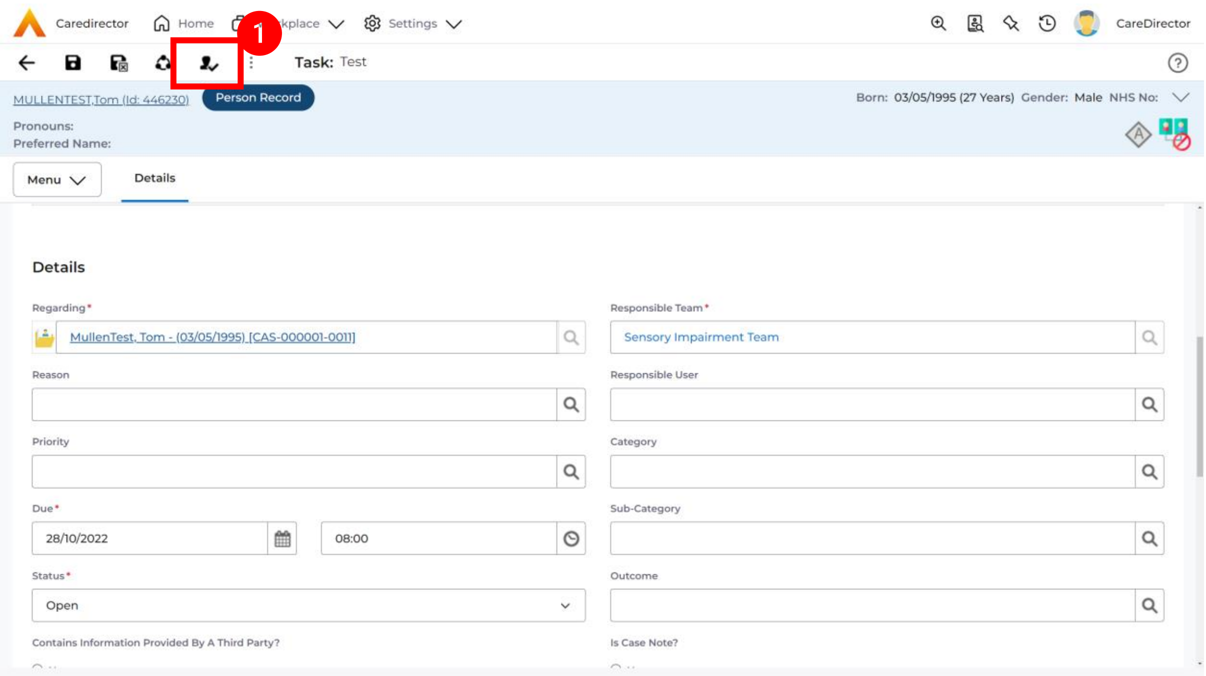


How to Allocate an existing Activity to another team

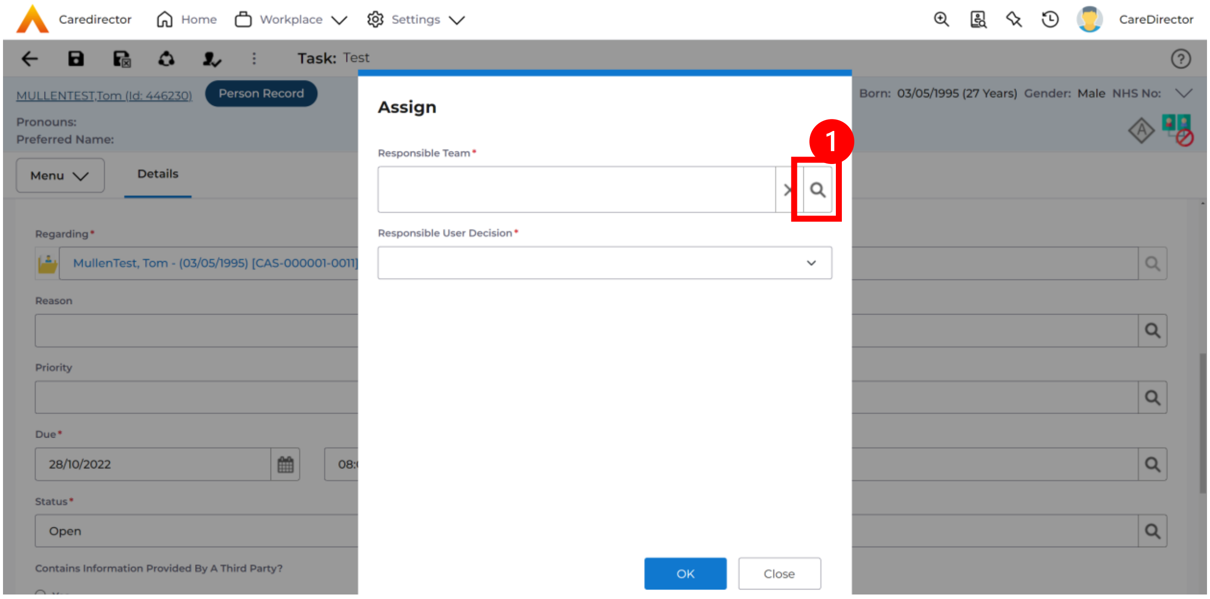
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



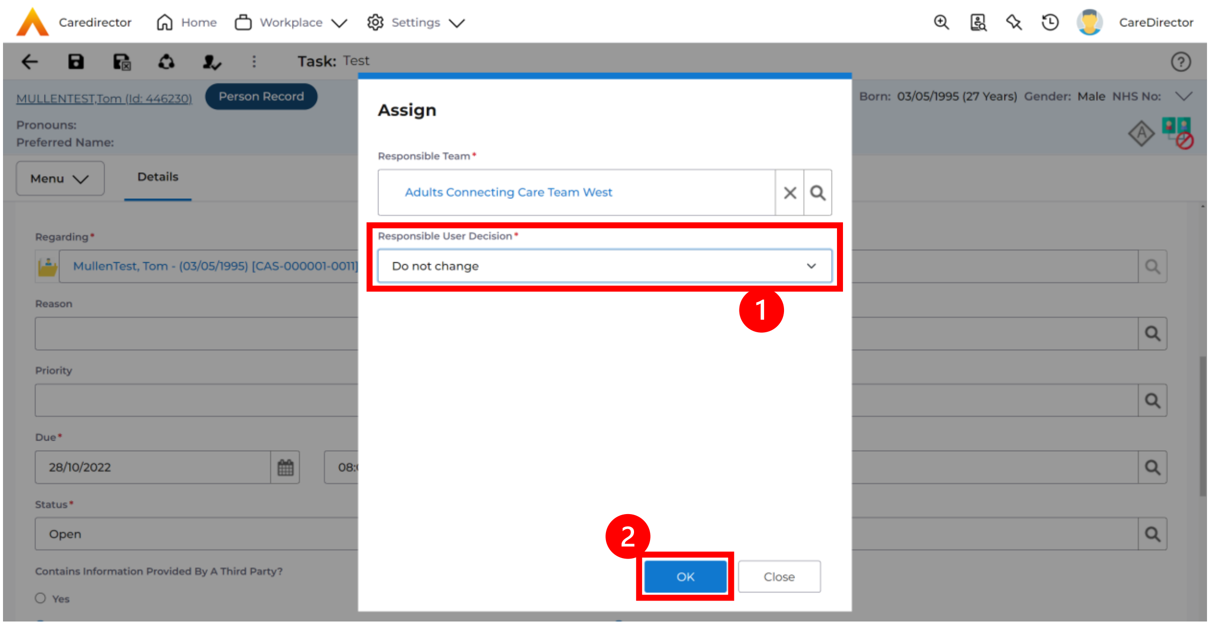
2. Next select **Assign this record to another team** from the toolbar.



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.



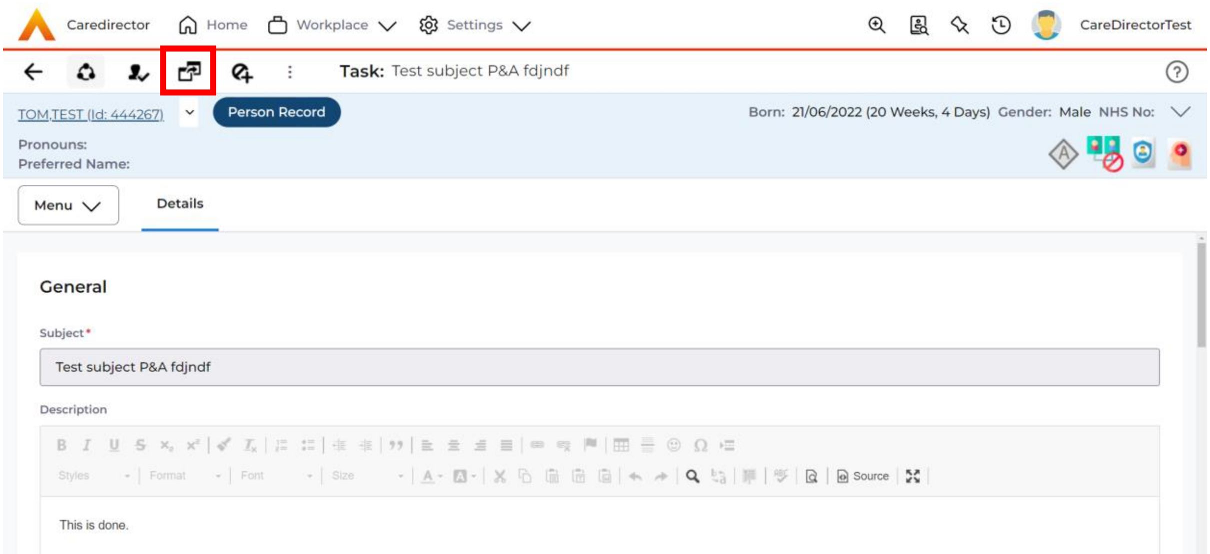
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



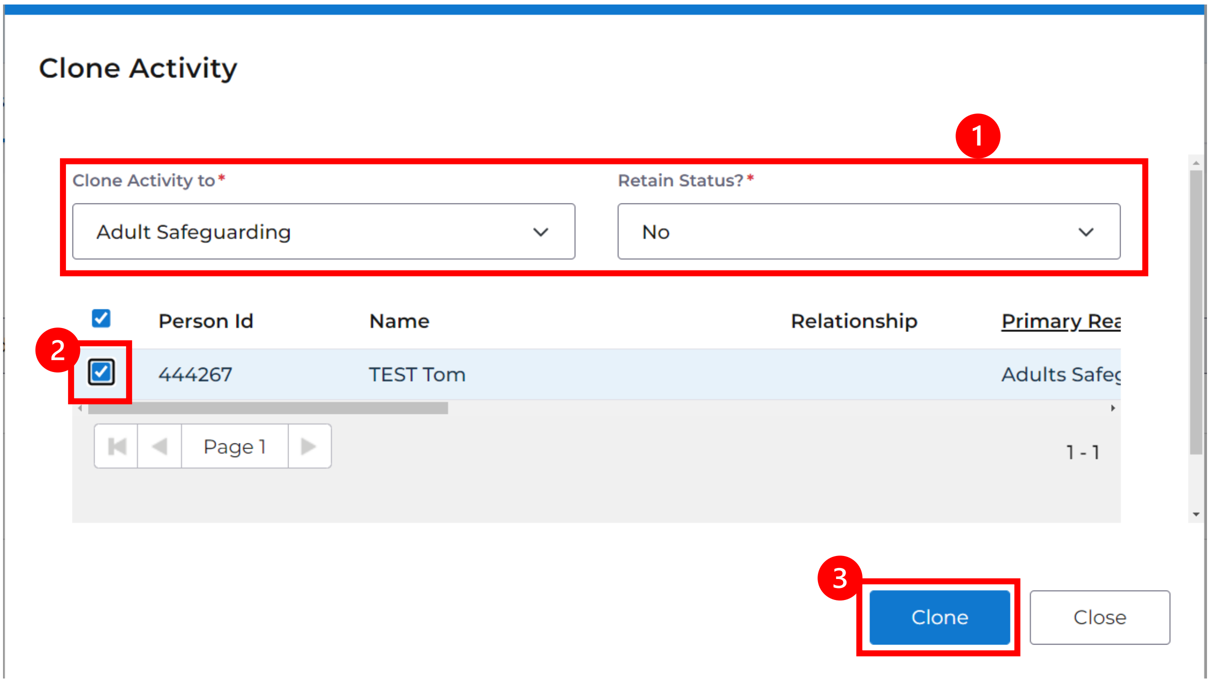
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

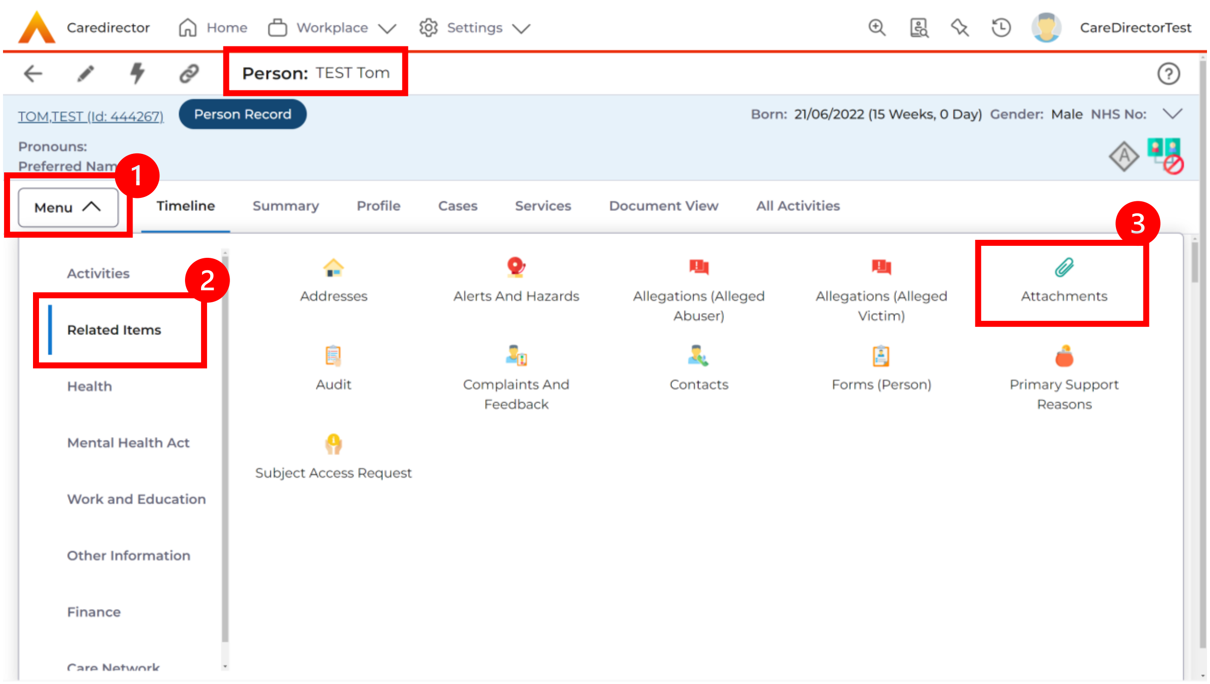


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

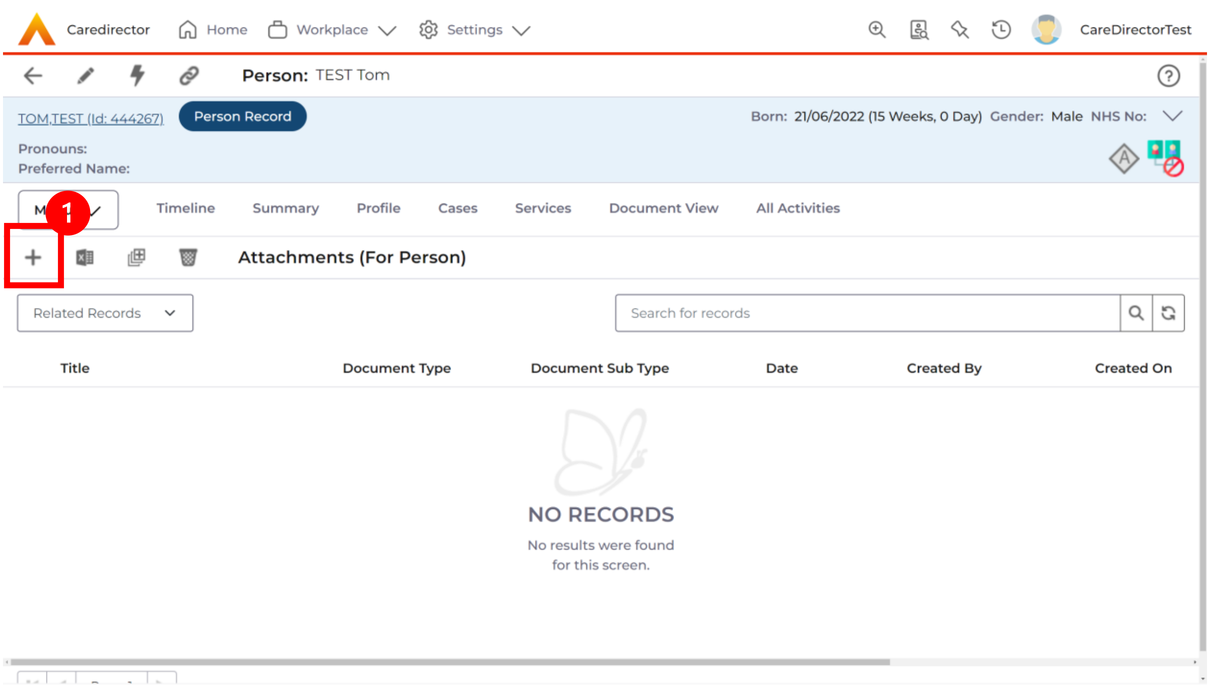


How to upload Attachments

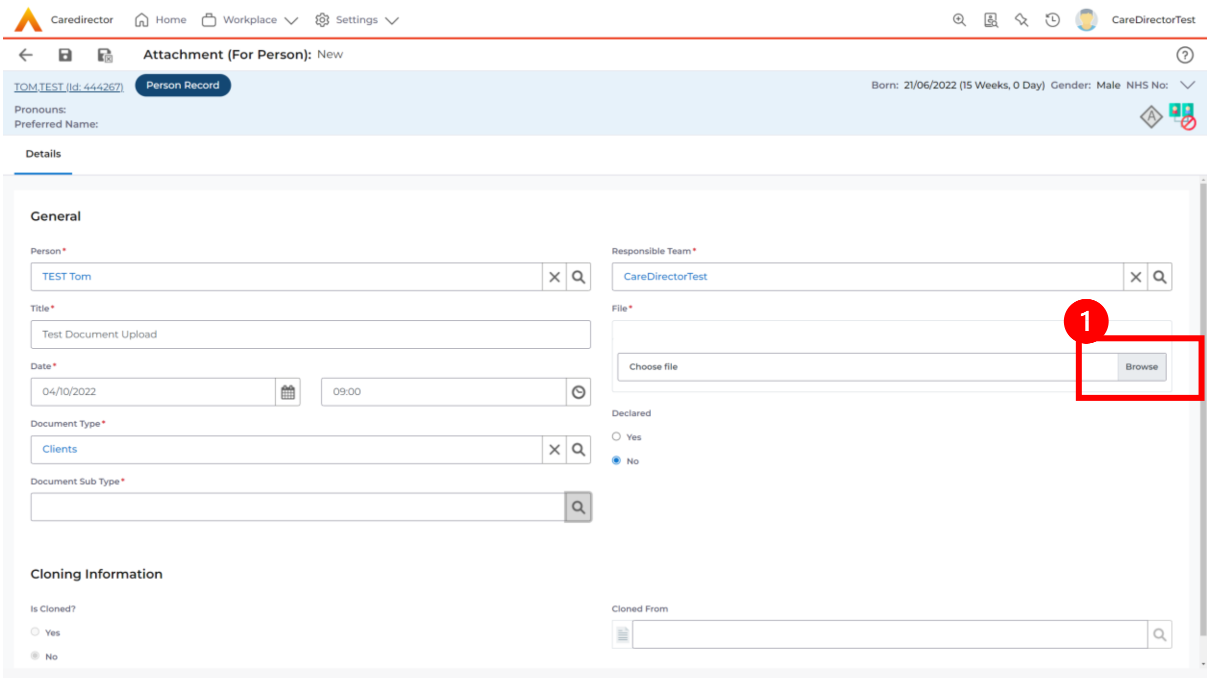
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



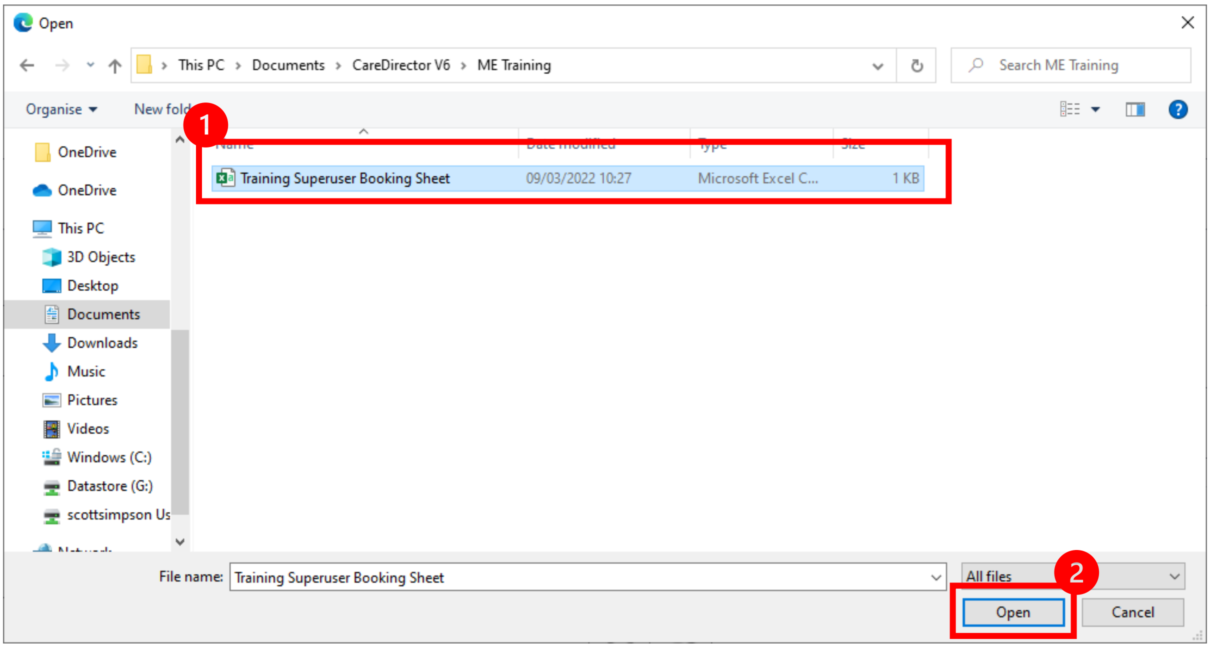
2. When opened, select the **Create New Record** from the toolbar.



3. Fill in the mandatory fields. When finished, select the **Browse** button in the **File** field.



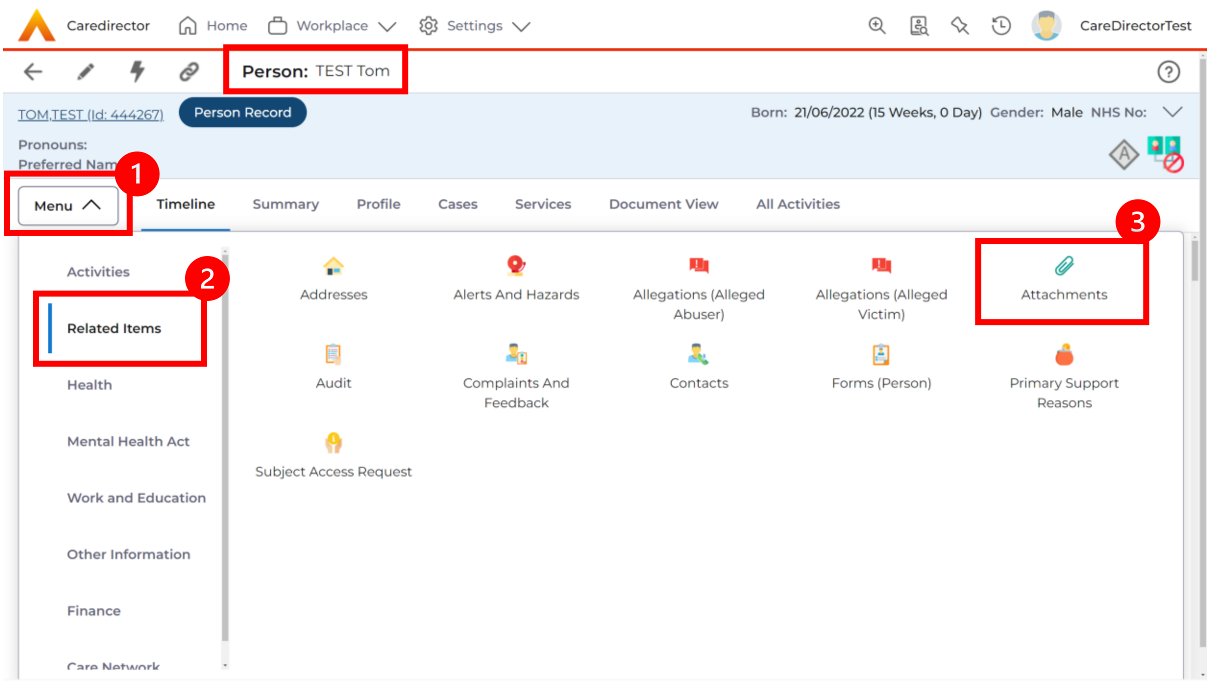
4. Select a **File** from your computer/ SharePoint and select **Open.**



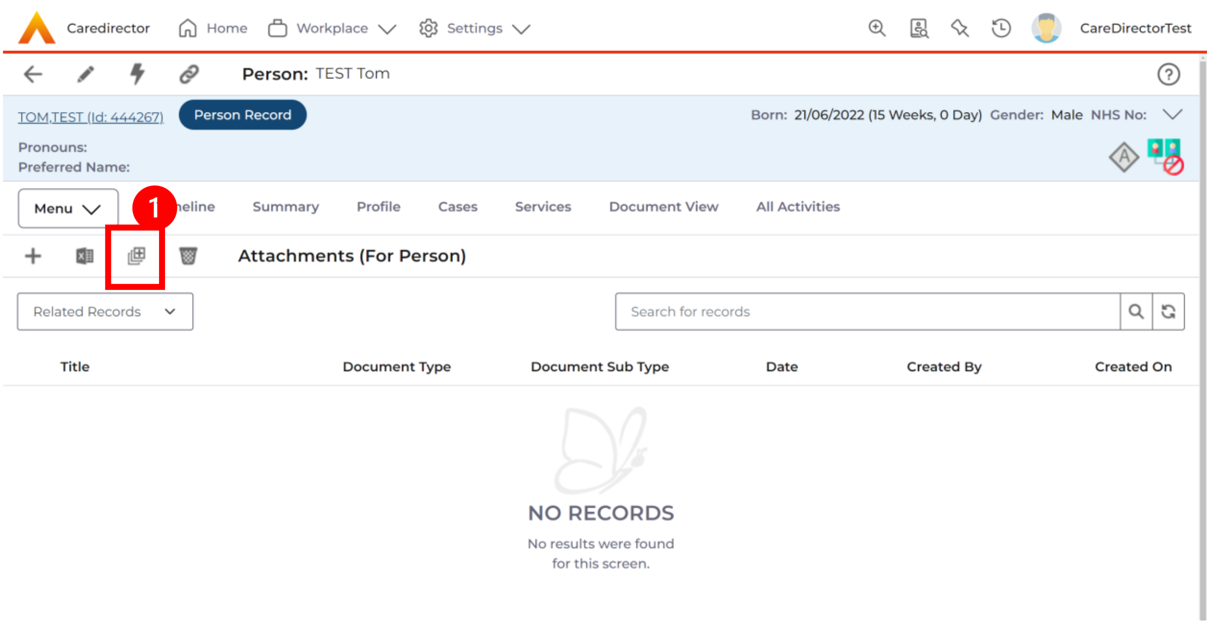
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

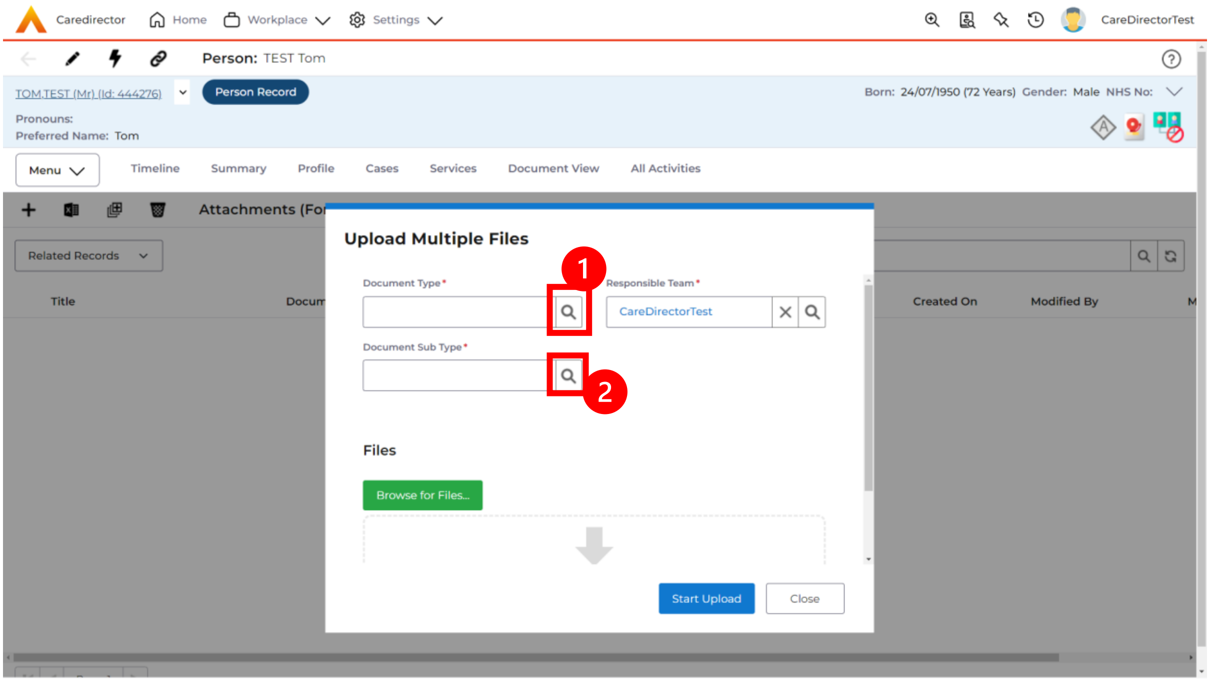
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



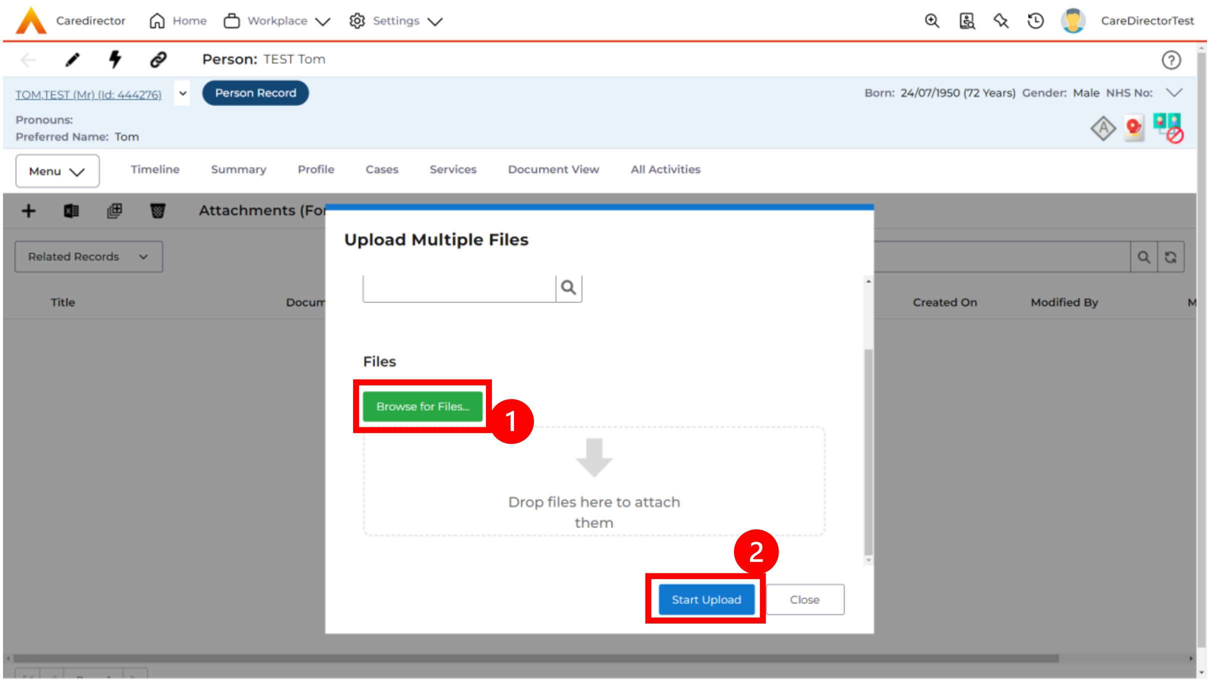
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



3. This will open a window and the **Document Type** and **Document Sub Type** needs to be chosen using the **Lookup** function.

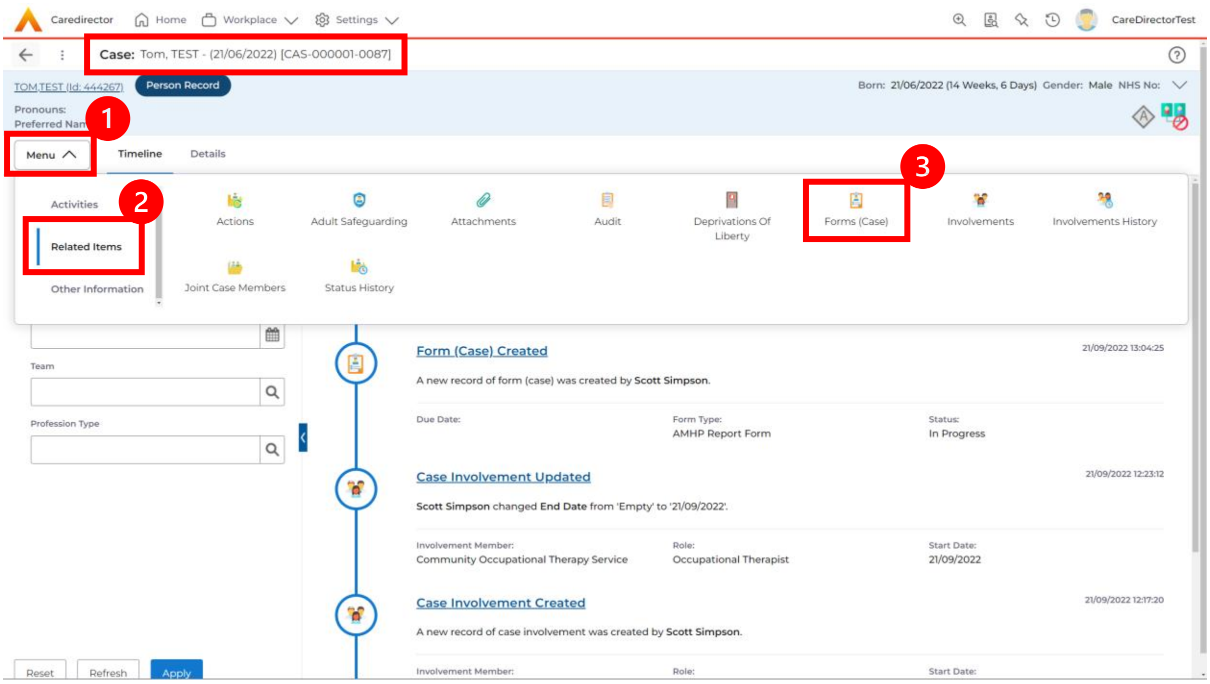


4. If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When done, select **Start Upload.**

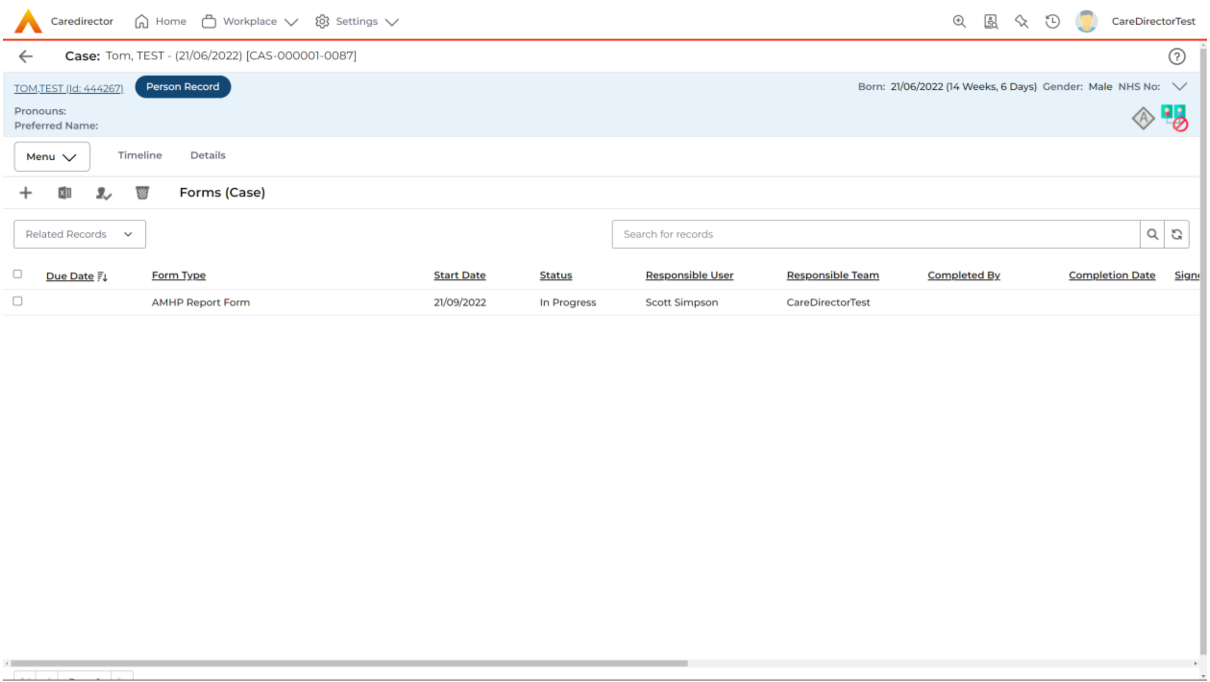


How to find a Form (Case)

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

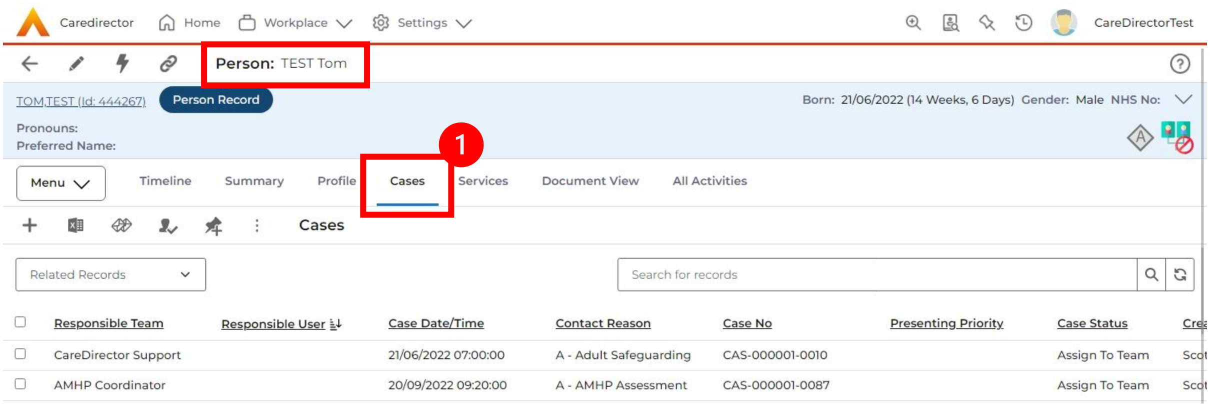


2. Select the relevant for **Form** to open.

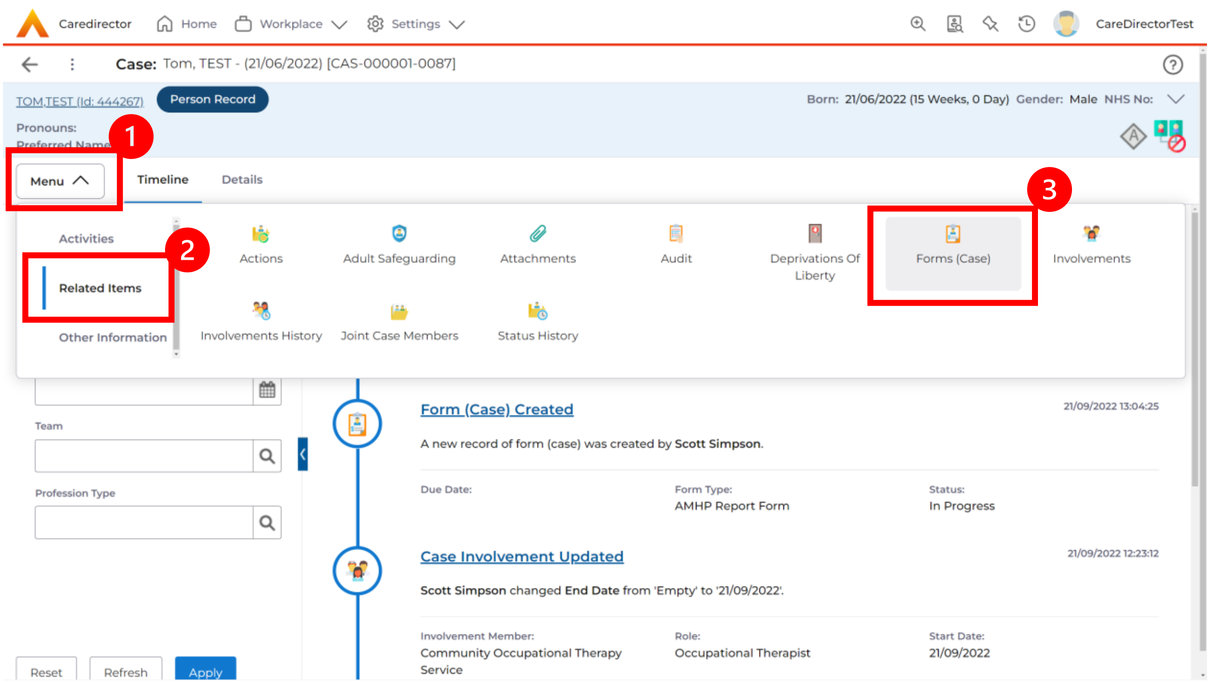


How to add a Form

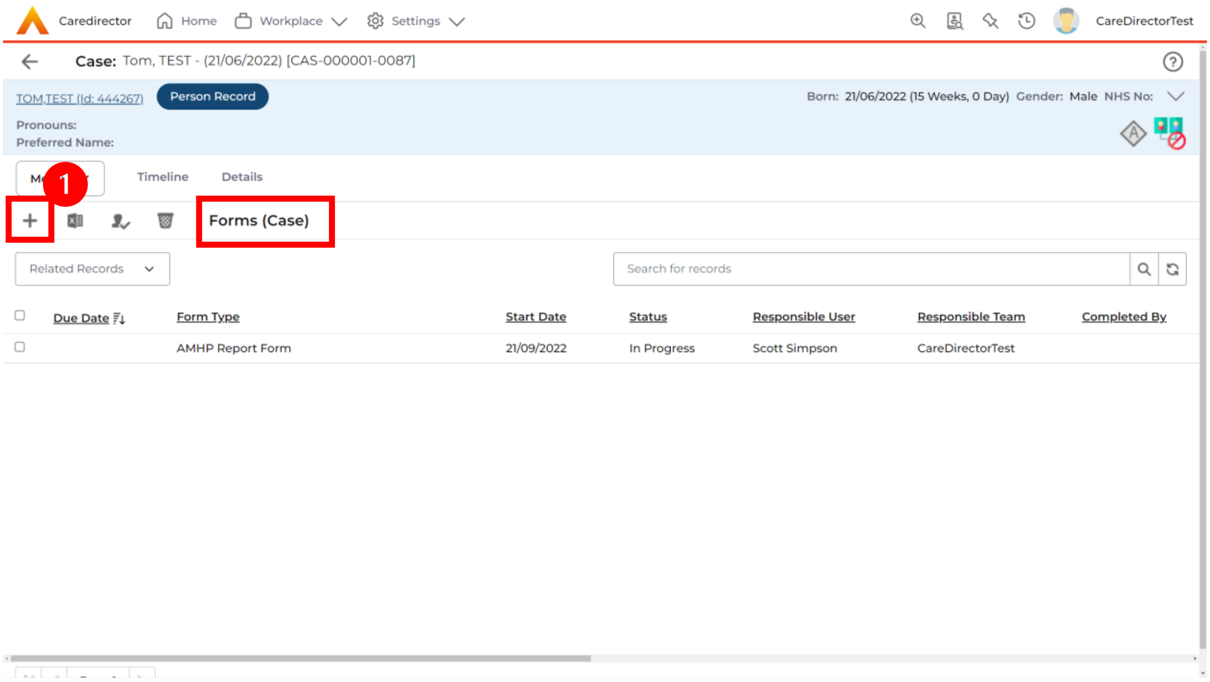
1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**. When found, select it to open the **Case Record**.



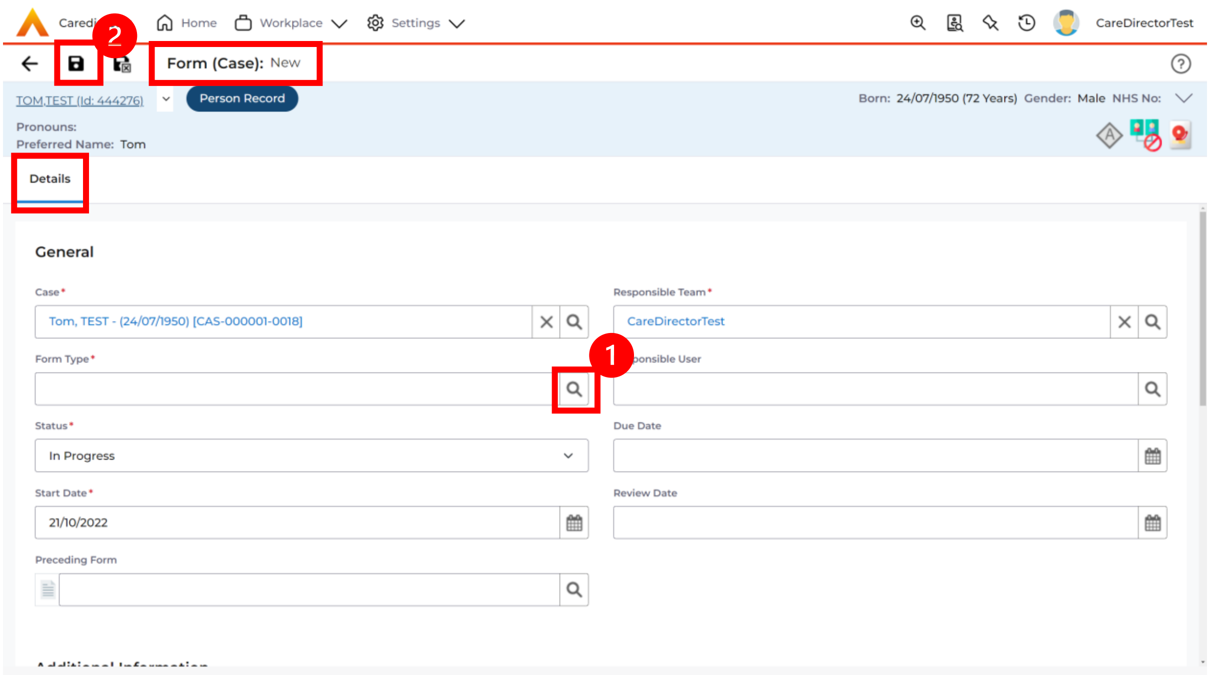
2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case).**



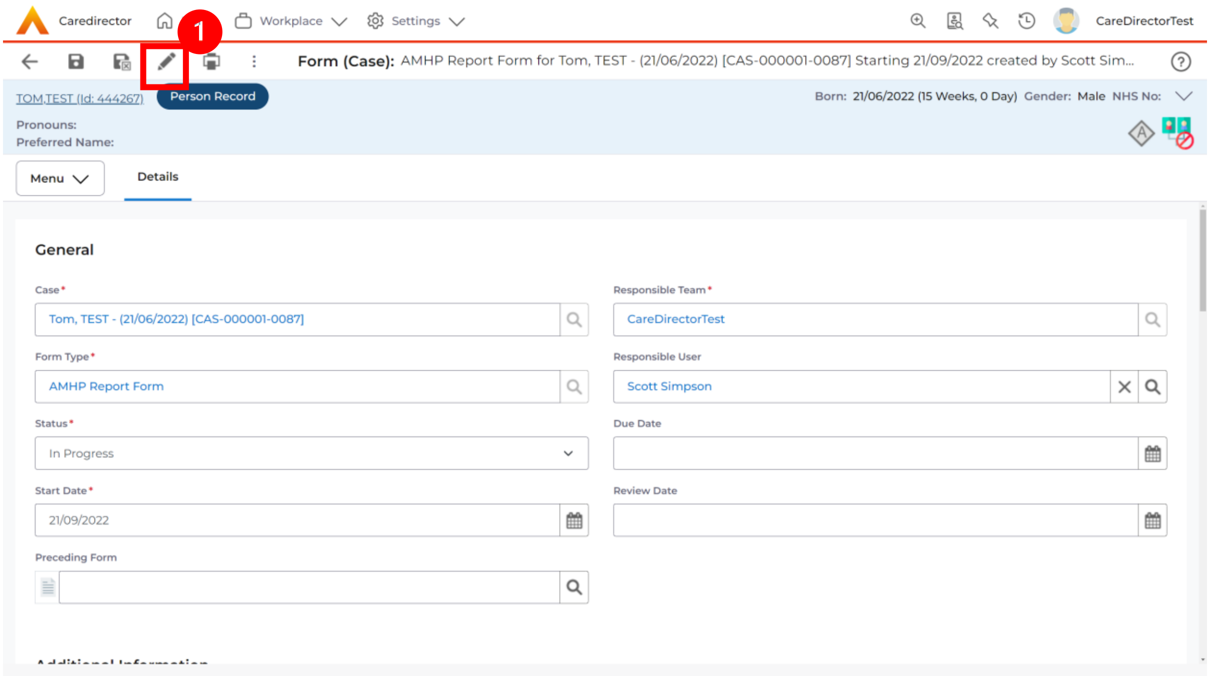
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



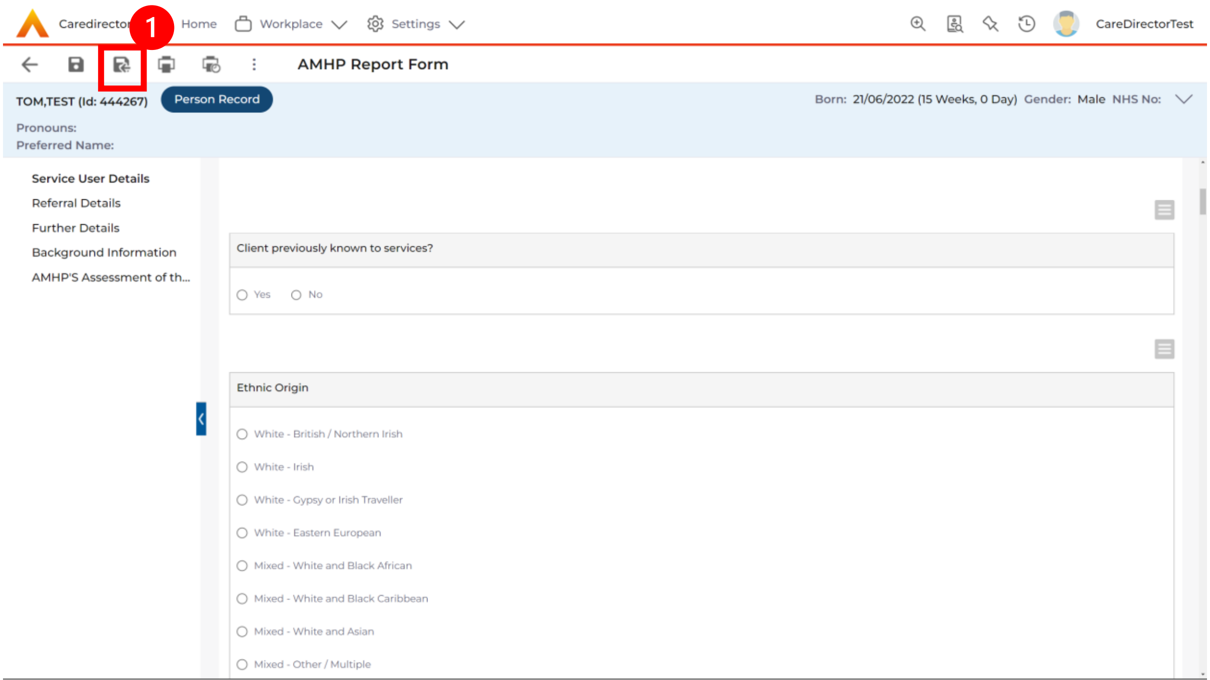
4. Once inside the **Details.** This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type.** When finished, select **Save.**



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.

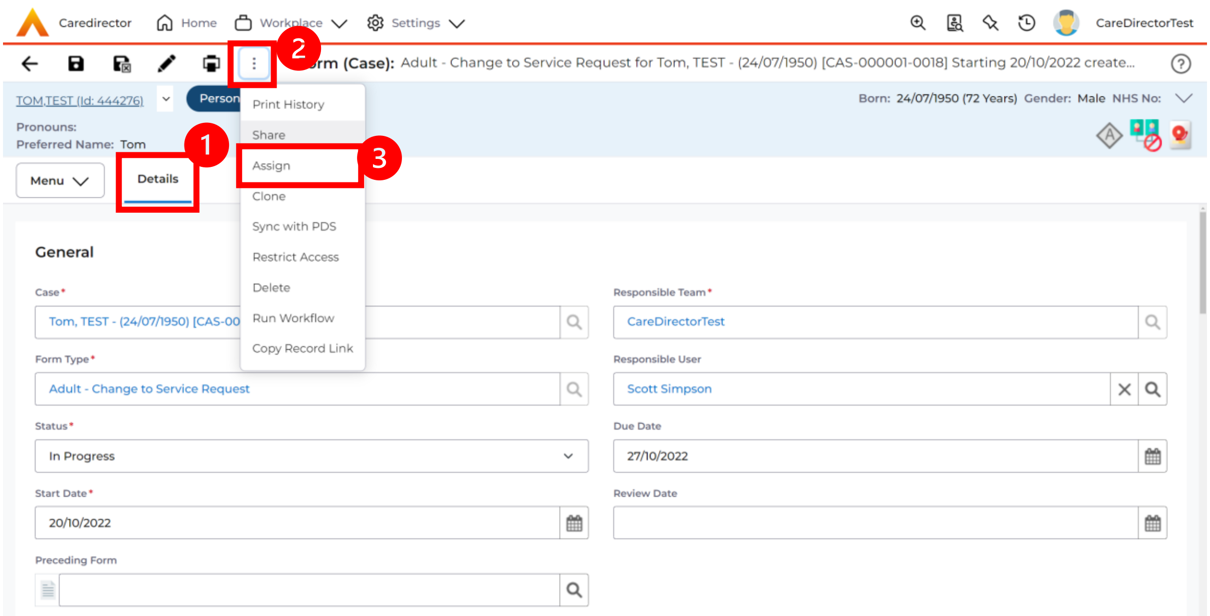


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

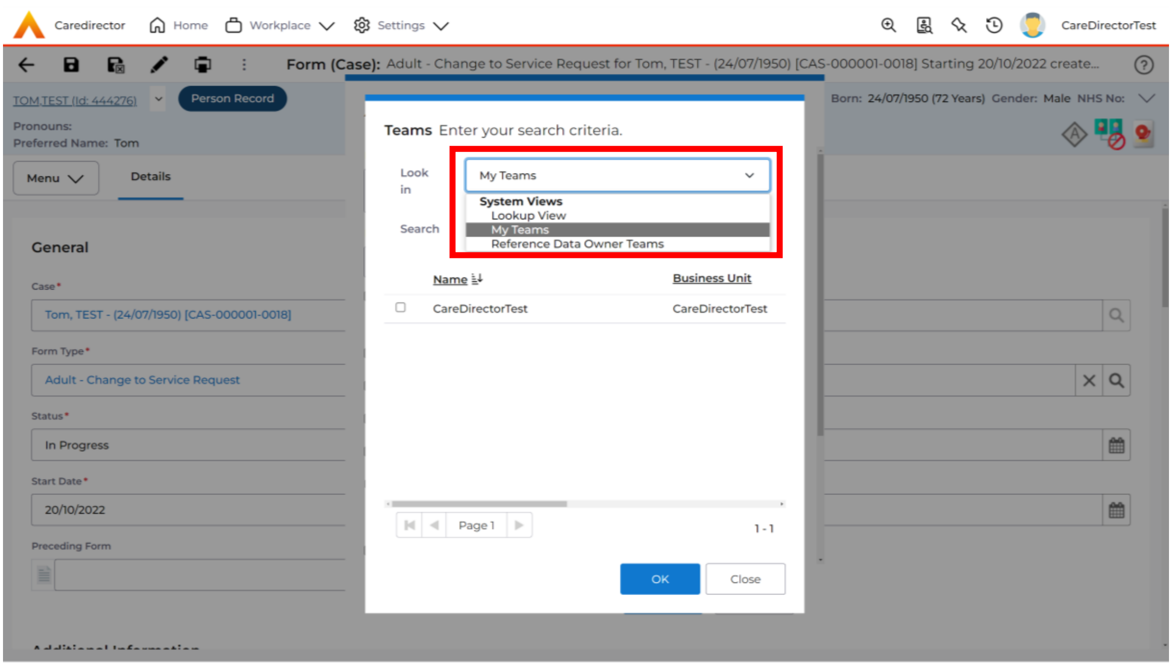


How to Allocate a Form

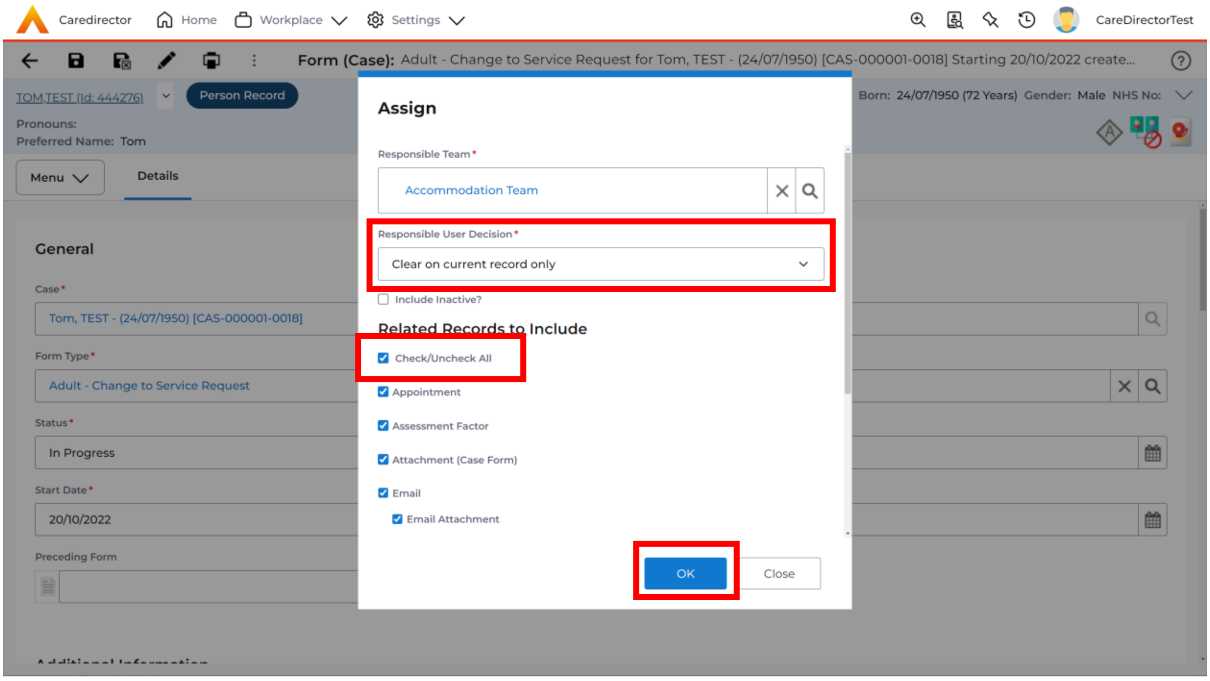
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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.

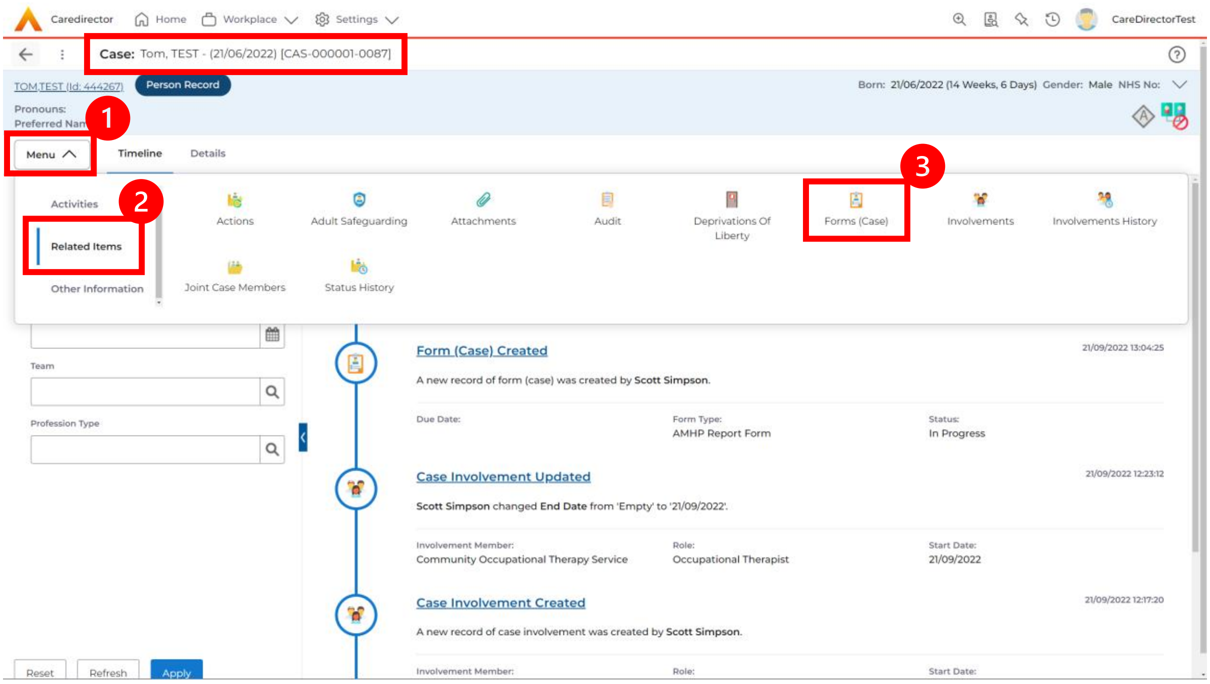


3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

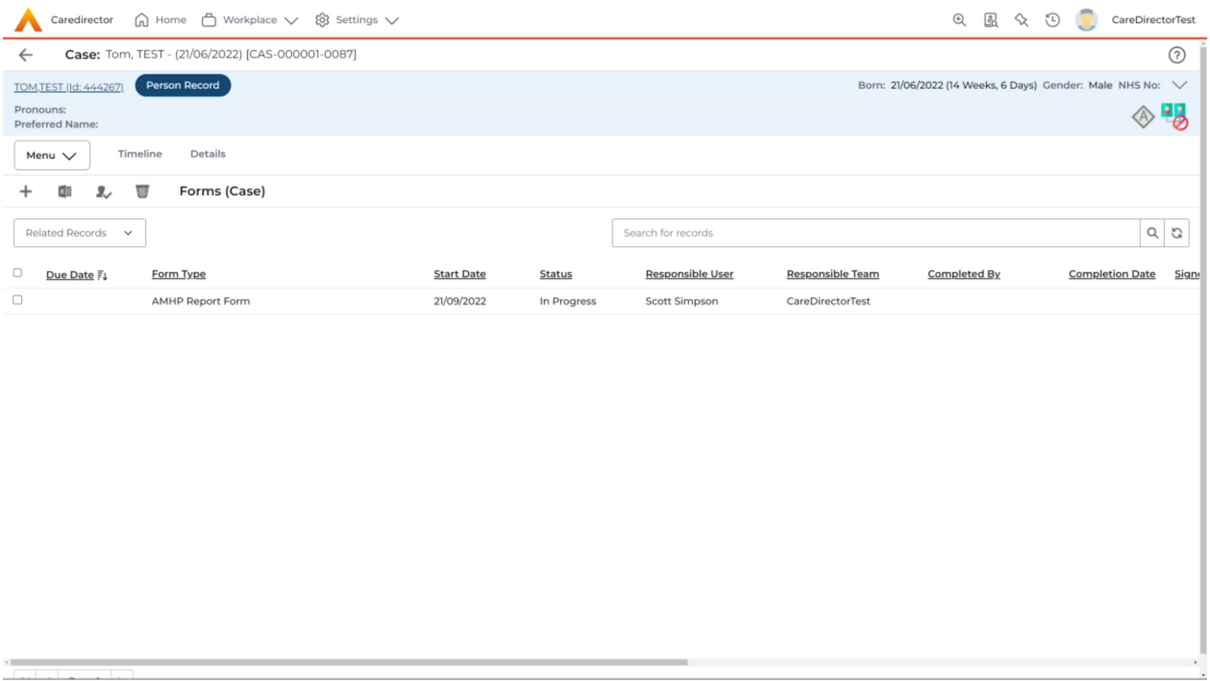


How to Clone a Form

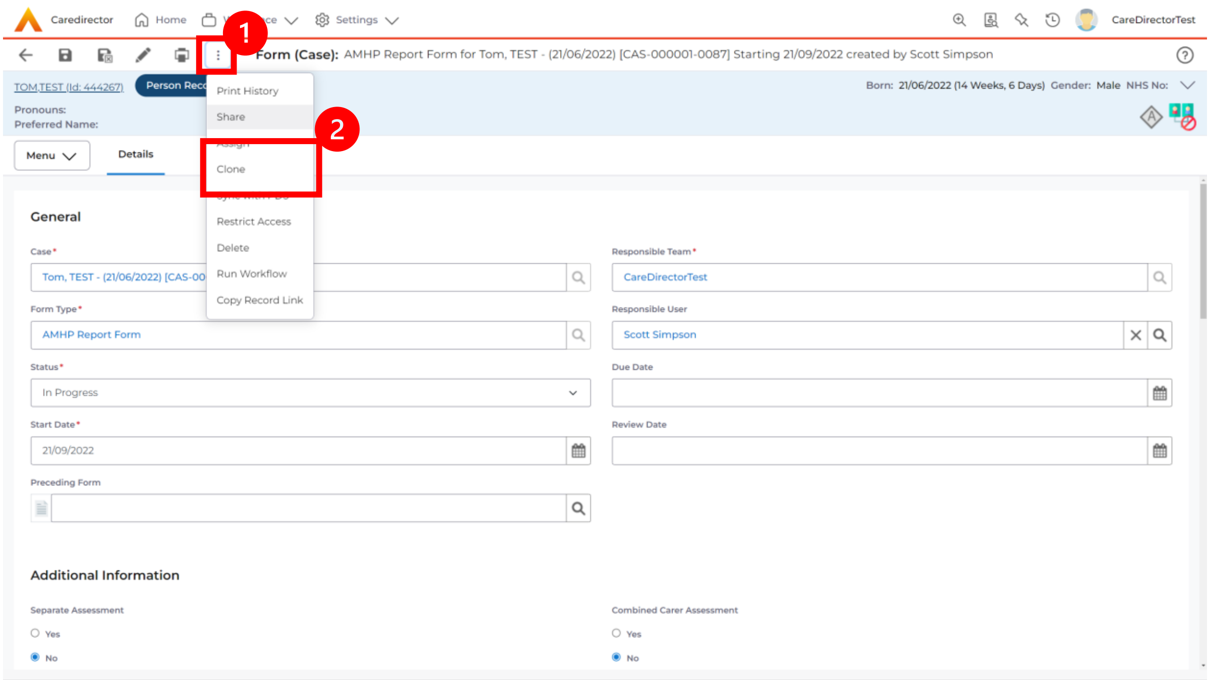
1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case).**



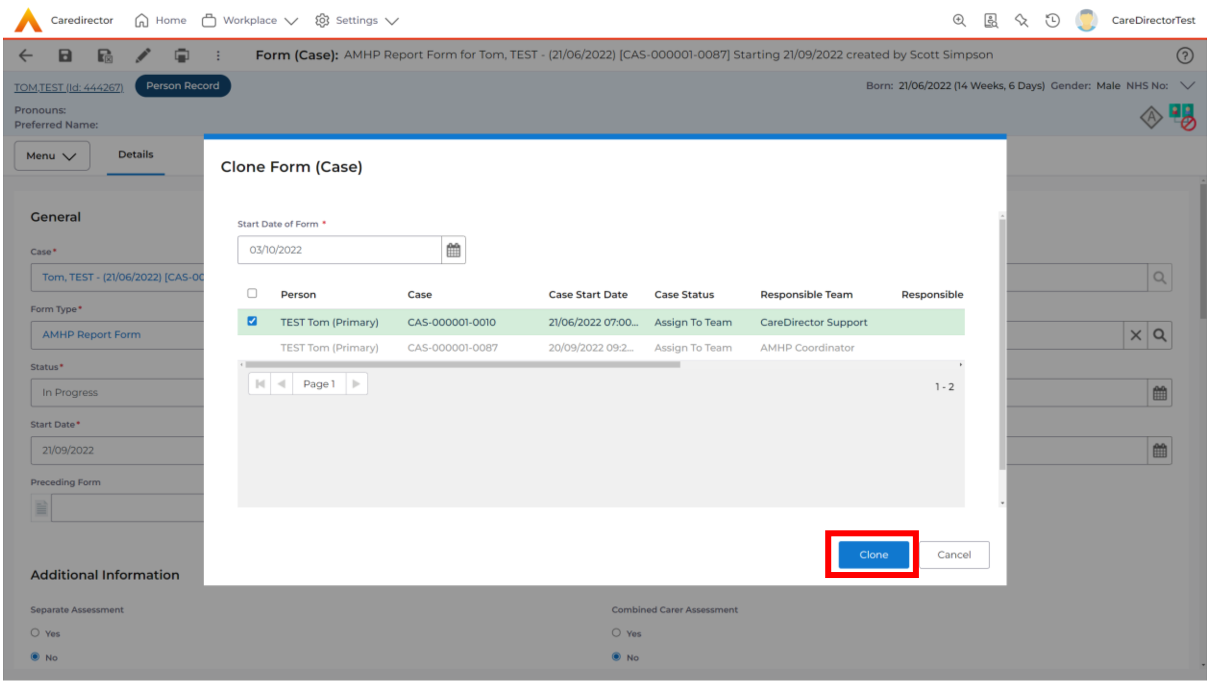
2. Select the relevant for **Form** to open.



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

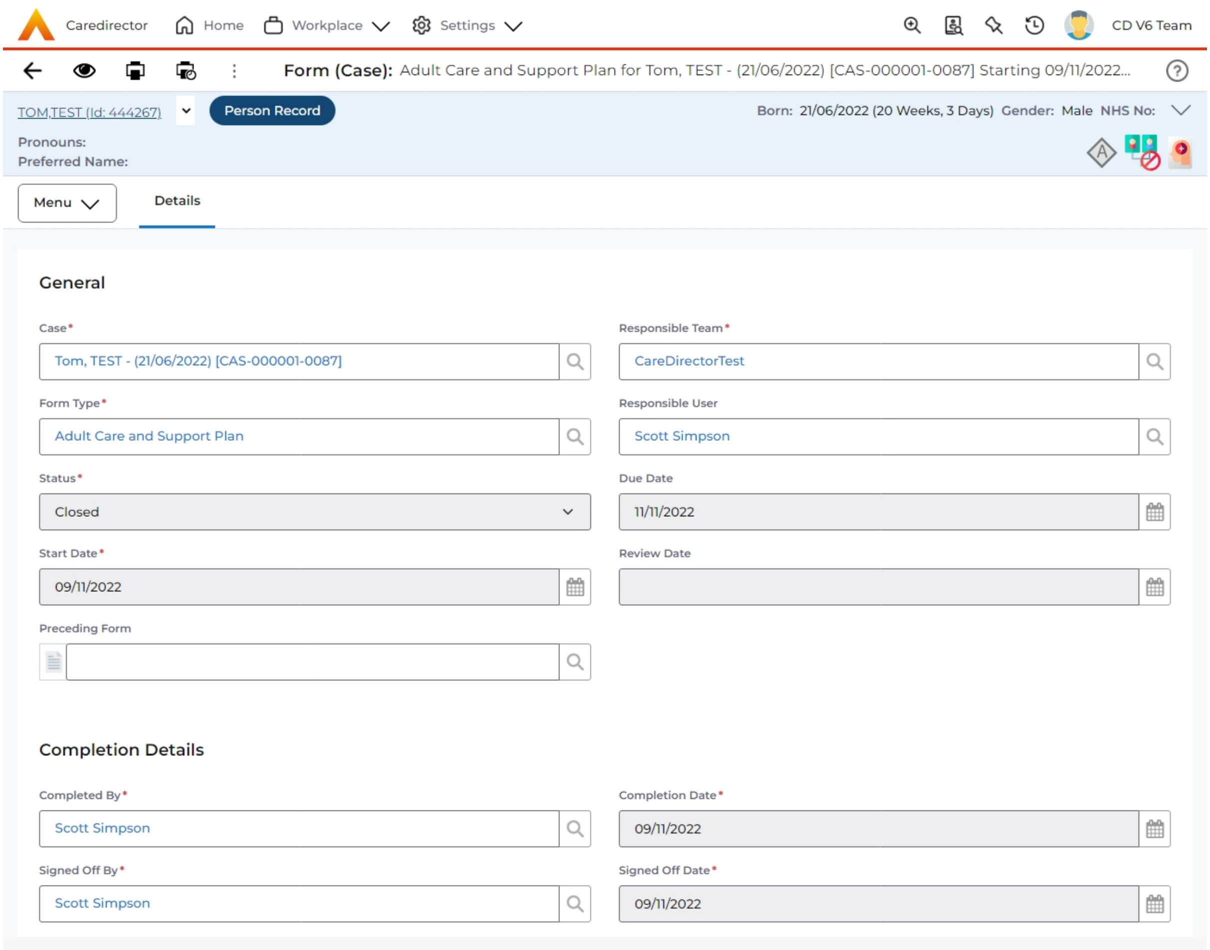


4. It will open a new window. Enter the **Start Date of Form.** Select which **Case** you would like this **Form** to be **Cloned** to. When check boxed, select **Clone.**



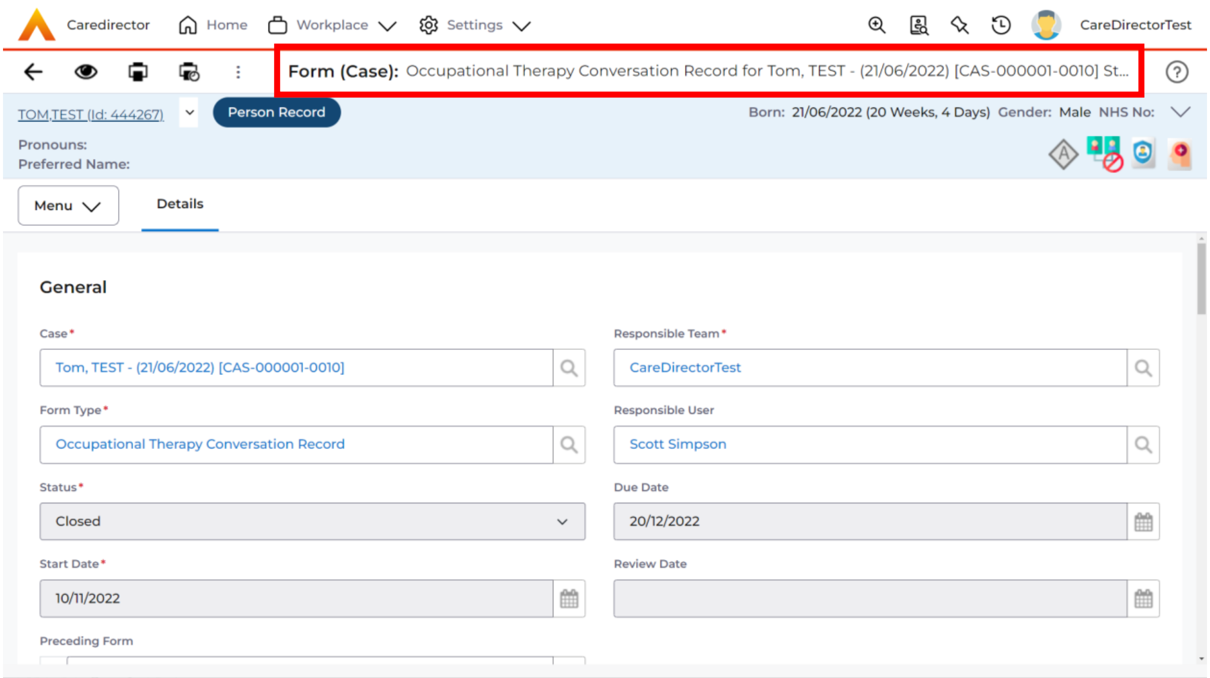
5. You do not need to **Save** this.

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**.

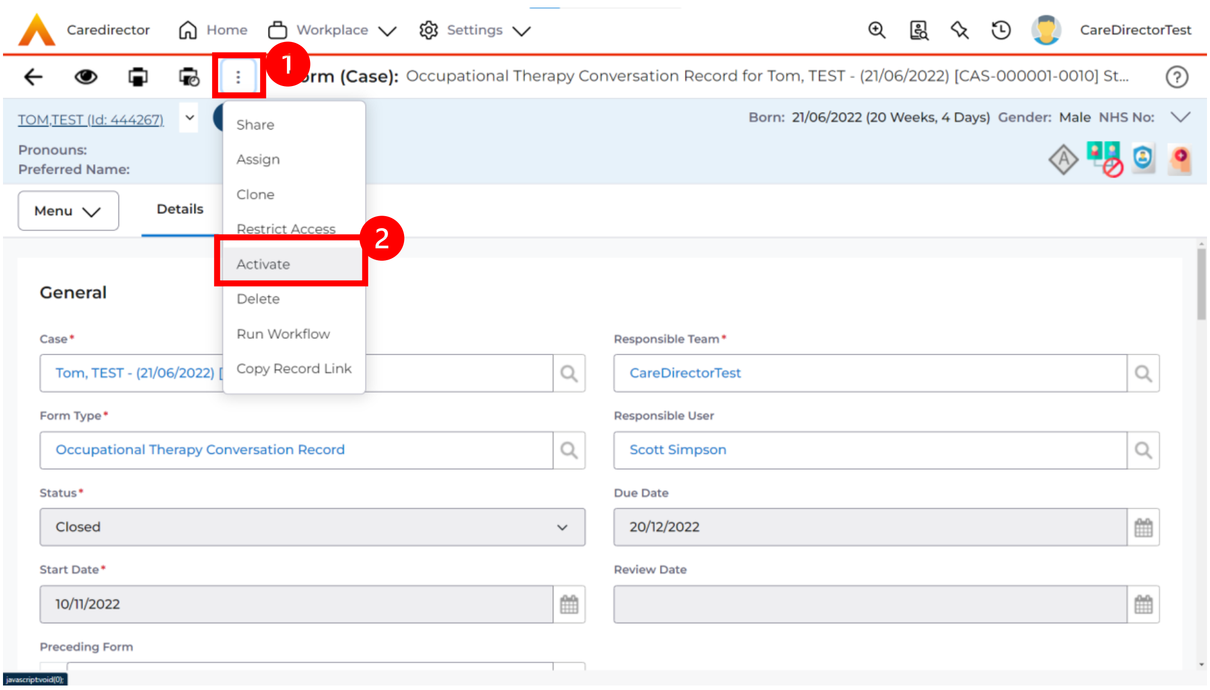


How to reactivate a Closed Form

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.**

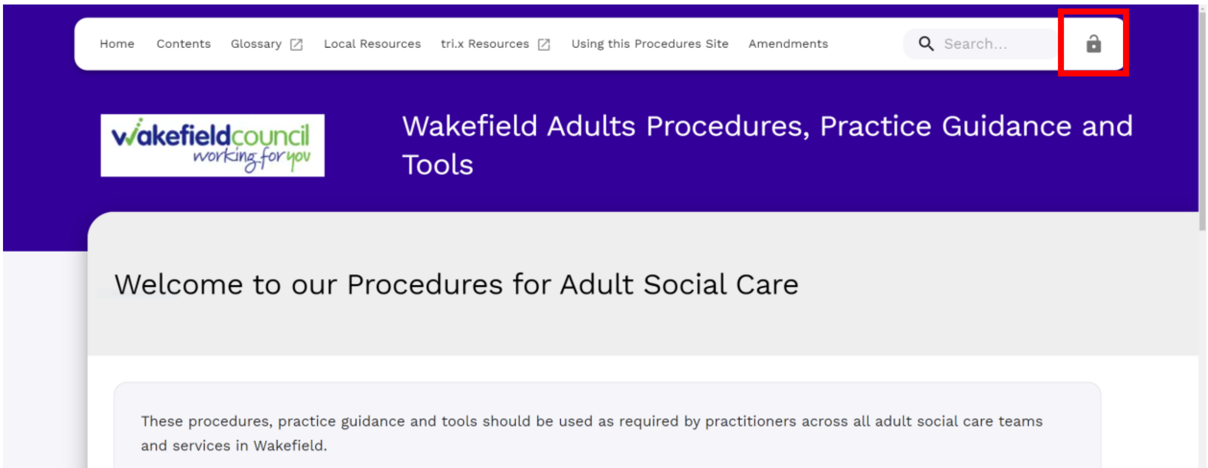


Further CareDirector Guidance

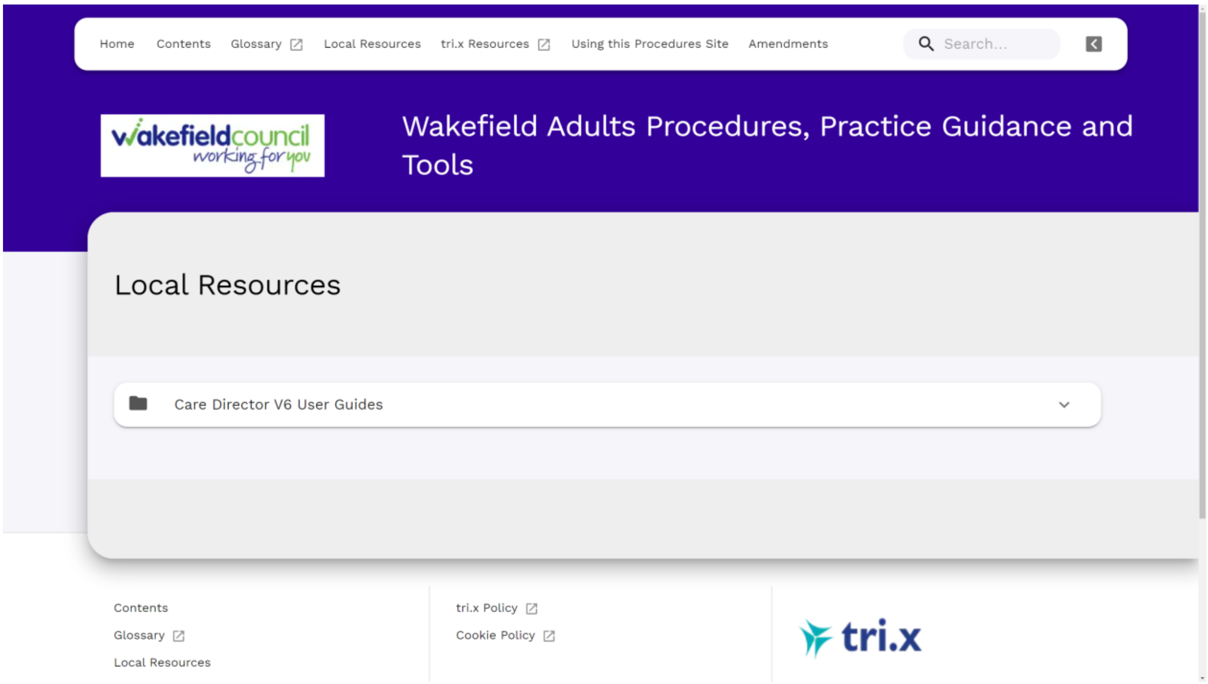
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

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 Number	Change	Author	By Date
V1	Initial Start	Scott Simpson	17/10/2022