



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.....	4
Before Live Access... ..	4
Guide Navigation	4
How to search for a Service User.....	6
Updating Person Details	7
How to add relationships	8
How to Enter Date of Death.....	10
How to change a person’s alias	11
How to add a Contact.....	13
How to find a linked Contact	15
How to add an Activity to a Contact.....	16
How to link a Contact to a Person Record	17
How to create a Person Record	19
Duplicate Detection.....	19
Adding a Person Record.....	20
How to search for a Case.....	23
How to create a Case	24
How to check the Case Status.....	25
How to change the Case Status	26
How to Allocate a Case to a Worker	27
How to send a Case to another team	29
How to add an Involvement (Secondary Allocation)	32
How to clone a Case.....	34
How to find Activities	36
How to input an Activity	38
How to change status to Complete (Re-activate Activities)	40
How to tell if an Activity is linked to a Case or Person Record.....	41
How to Allocate a new Activity to another team.....	42
How to Allocate an existing Activity to another team	44
How to Clone Activities	46
How to upload Attachments	47
How to upload multiple attachments	49

How to find a Form (Case)	51
How to add a Form	52
How to Allocate a Form	55
How to Clone a Form.....	57
How to reactivate a Closed Form.....	60
Further CareDirector Guidance	61

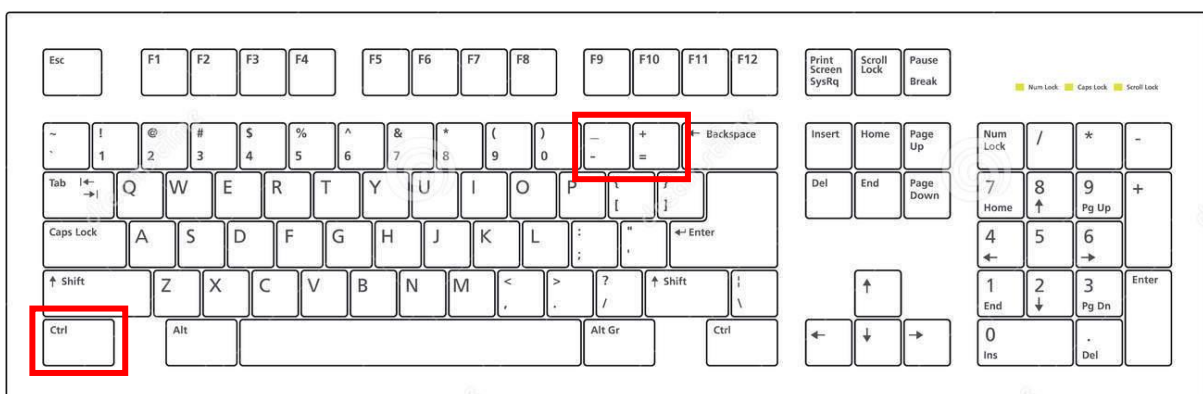
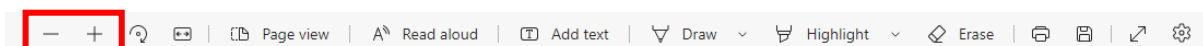
Guide Information

Before Live Access...

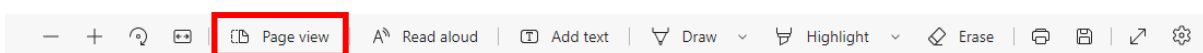
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

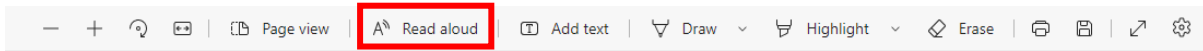
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold) and - (Press)** or **Ctrl (Hold) and + (Press)** on your keyboard.



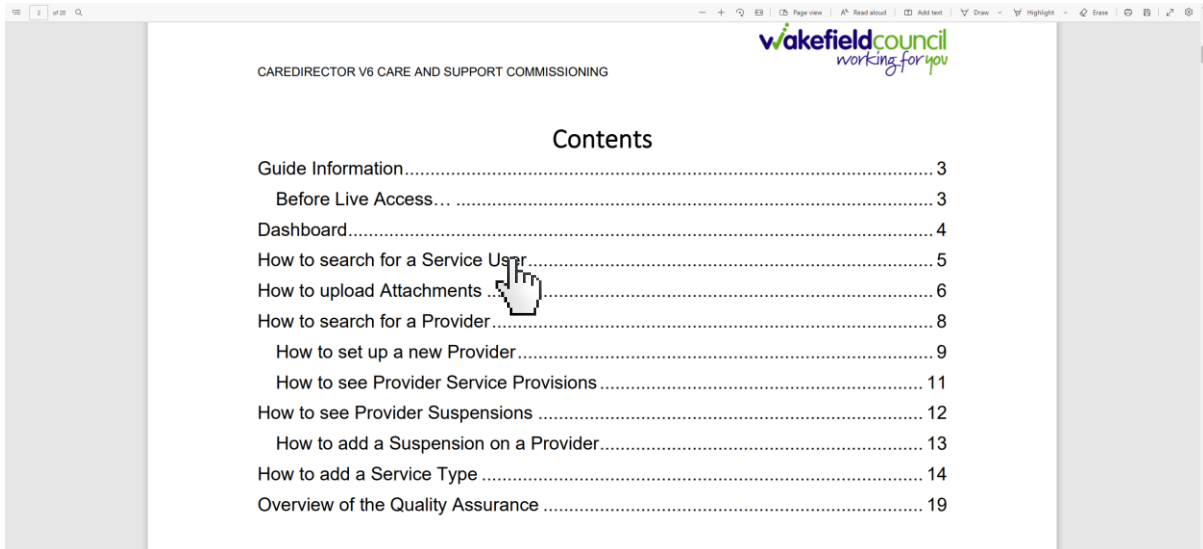
3. To put pages next to one another, select the **Page View** icon on the toolbar.



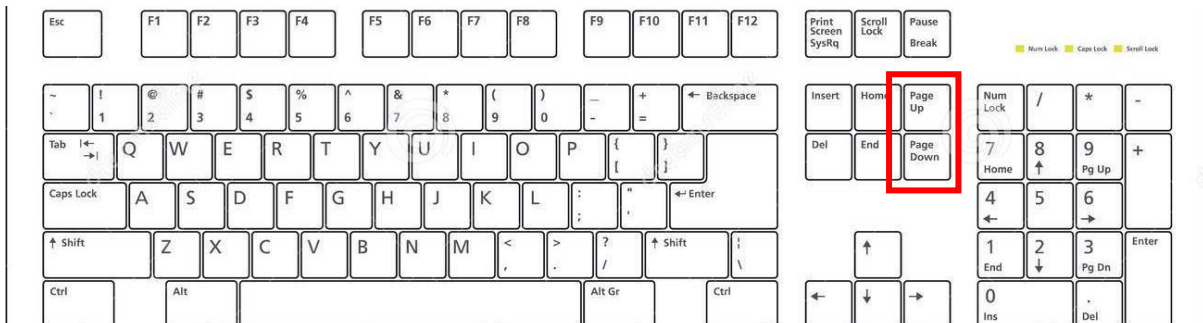
4. For auditory assistance, select **Read Aloud** from the toolbar.



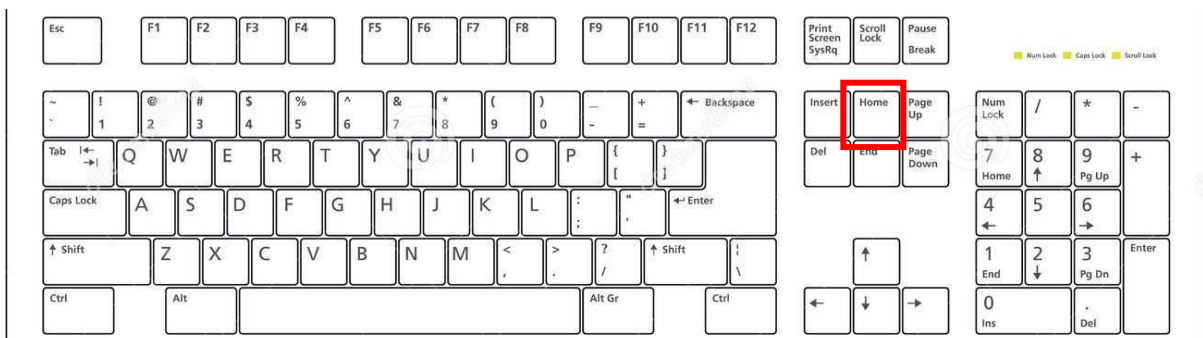
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

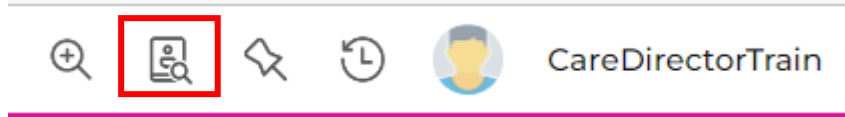


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

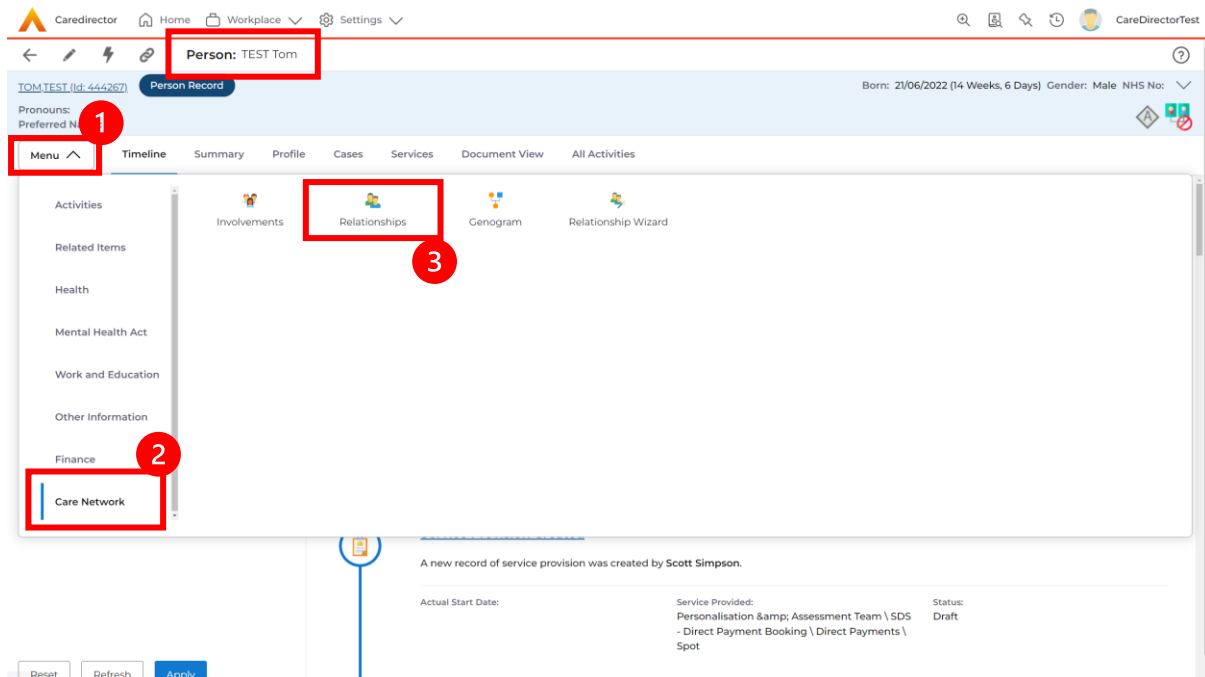
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case)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

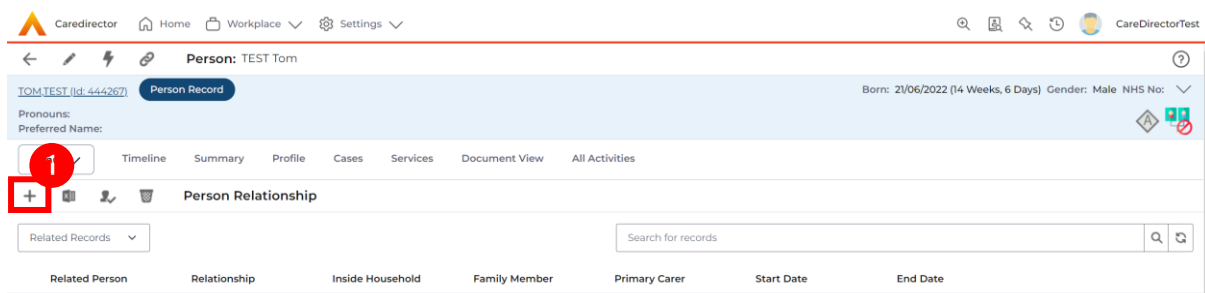
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no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

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

The screenshot shows the CareDirector interface for a person record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a toolbar with a back arrow, an edit icon (pencil) highlighted with a red box and a red circle containing the number '1', and a 'Person: Test Tom' label also highlighted with a red box. The main content area is titled 'Person Record' and shows details for 'TOM,Test (Id: 446229)'. It includes fields for 'Pronouns' and 'Preferred Name'. Below this is a menu with options: 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' view shows a calendar filter and a list of activities for 'OCT 2022'. Two activities are visible: 'Form (Case) Created' and 'Task Created', both by Scott Simpson. The 'Form (Case) Created' activity includes details: Due Date: 20/11/2022, Form Type: DoLS Tracker - Cat 2, Status: In Progress.

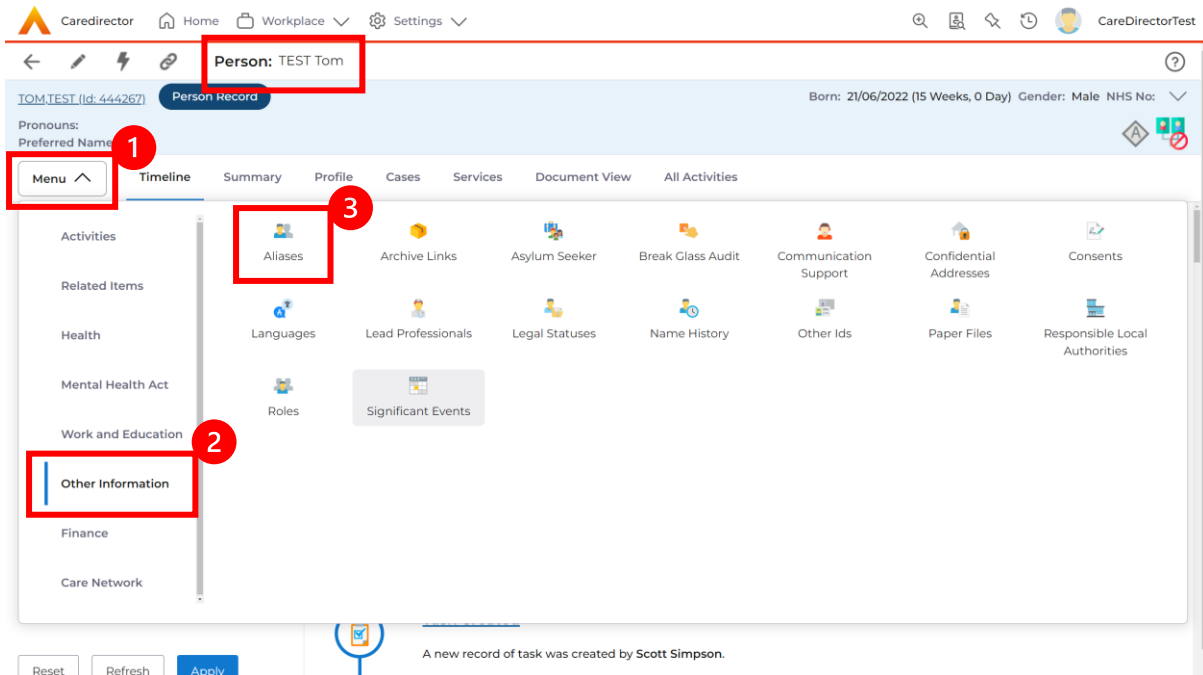
2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes**.

The screenshot shows the 'Death Information' section of the person record. It includes a 'Deceased' section with radio buttons for 'Yes' (selected) and 'No'. Below this is a 'Date of Death' field with a calendar icon. To the right, there are two text input fields: 'Cause of Death' and 'Place of Death', both with search icons.

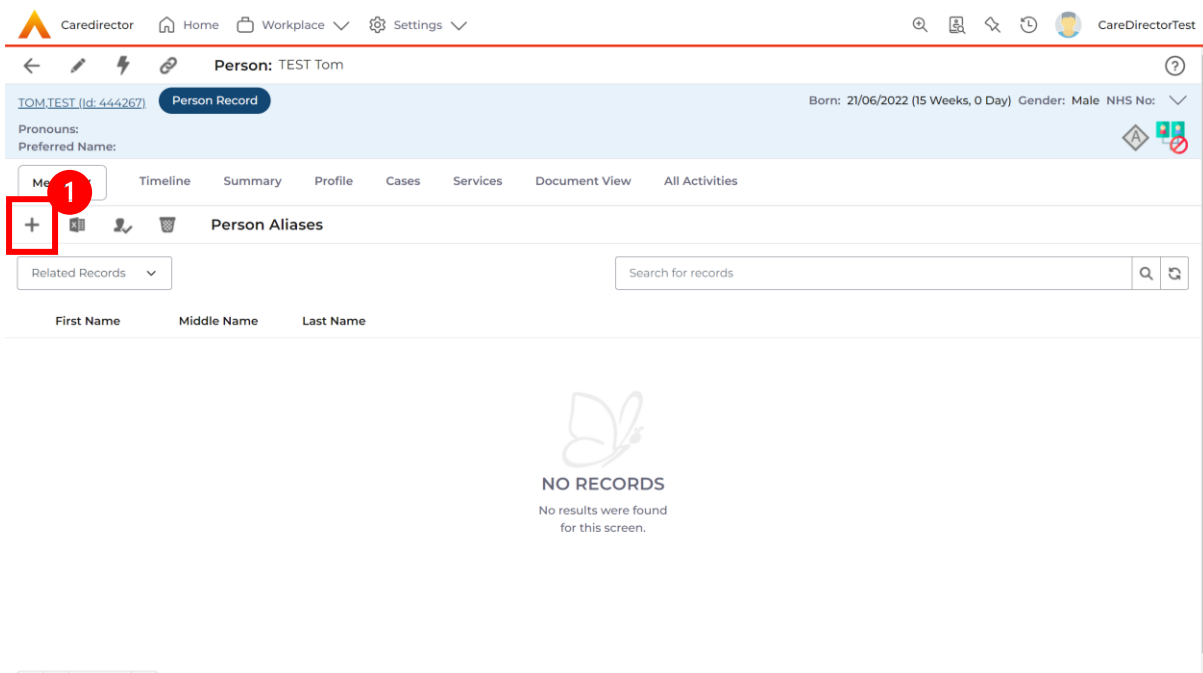
3. Enter in the details if known, when finished select **Save**. This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker**.

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**.

Caredirector Home Workplace Settings

Person Alias: New

TOM.TEST (id: 444267) Person Record Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name: [dropdown]

Details

General

Person* [TEST Tom] x Q Responsible Team* [CareDirectorTest] x Q

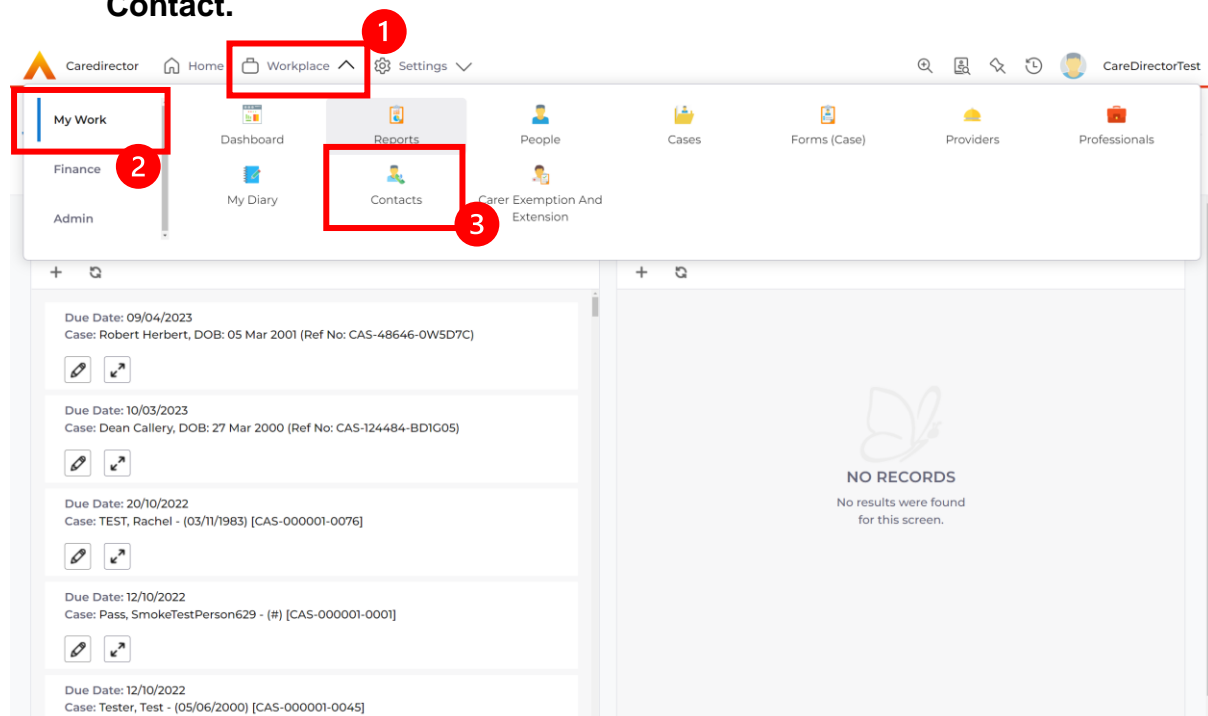
First Name [] Middle Name []

Last Name* []

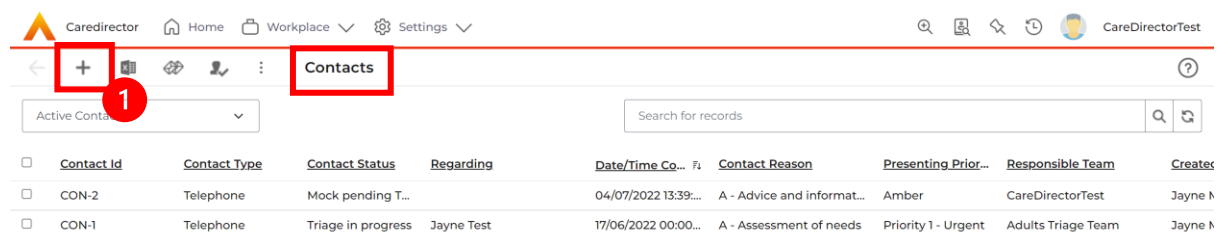
[Save] [Cancel] [Back] [Forward] [Refresh] [Help]

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 user name 'CD V6 Team'. The main content area displays the person's details: 'Person: TEST Tom', 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (20 Weeks, 3 Days)', and 'Gender: Male NHS No:'. Below this is a sidebar with a 'Menu' button (circled 1) and a list of categories including 'Activities', 'Related Items' (circled 2), 'Health', 'Mental Health Act', 'Work and Education', and 'Other Information'. The main content area shows various record types like 'Addresses', 'Alerts And Hazards', 'Allegations (Alleged Abuser)', 'Allegations (Alleged Victim)', 'Attachments', 'Audit', 'Complaints And Feedback', 'Forms (Person)', 'Primary Support Reasons', and 'Subject Access Requests'. The 'Contacts' option 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 'Contacts' section of the CareDirector interface. The header bar is the same as in the previous screenshot. The main content area is titled 'Contacts' and features a search bar and a dropdown menu for 'Related Records'. Below this is a table with the following data:

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 breadcrumb navigation includes 'Workplace' and 'Contacts'. The contact title is 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - ...'. Below this, the 'Person Record' section shows the contact's name 'TOM.TEST (id: 444267)', birth date '21/06/2022', gender 'Male', and NHS number. A 'Menu' button is highlighted with a red box and a '1' in a red circle. Under 'Related Items', the 'Activities' option is highlighted with a red box and a '2' in a red circle. Below the 'Related Items' section, 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 the same contact record. The breadcrumb navigation now includes 'Family/Friend/Neighbour'. The contact title is 'Contact: Telephone for TEST Tom received 04/07/2022 referred by Individuals - Family/Friend/Neighbour'. Below this, the 'Person Record' section shows the contact's name 'TOM.TEST (id: 444267)', birth date '21/06/2022', gender 'Male', and NHS number. A 'Menu' button is visible. Below the 'Menu' button, the 'Tasks' section is visible, and the 'Create New Record' button (a plus sign) is highlighted with a red box and a '1' in a red circle. Below the 'Tasks' section, there are input fields for 'Related Records' and 'Search for records'. At the bottom, there is a table with columns: Subject, Due, Status, Regarding, Reason.

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

How to link a Contact to a Person Record

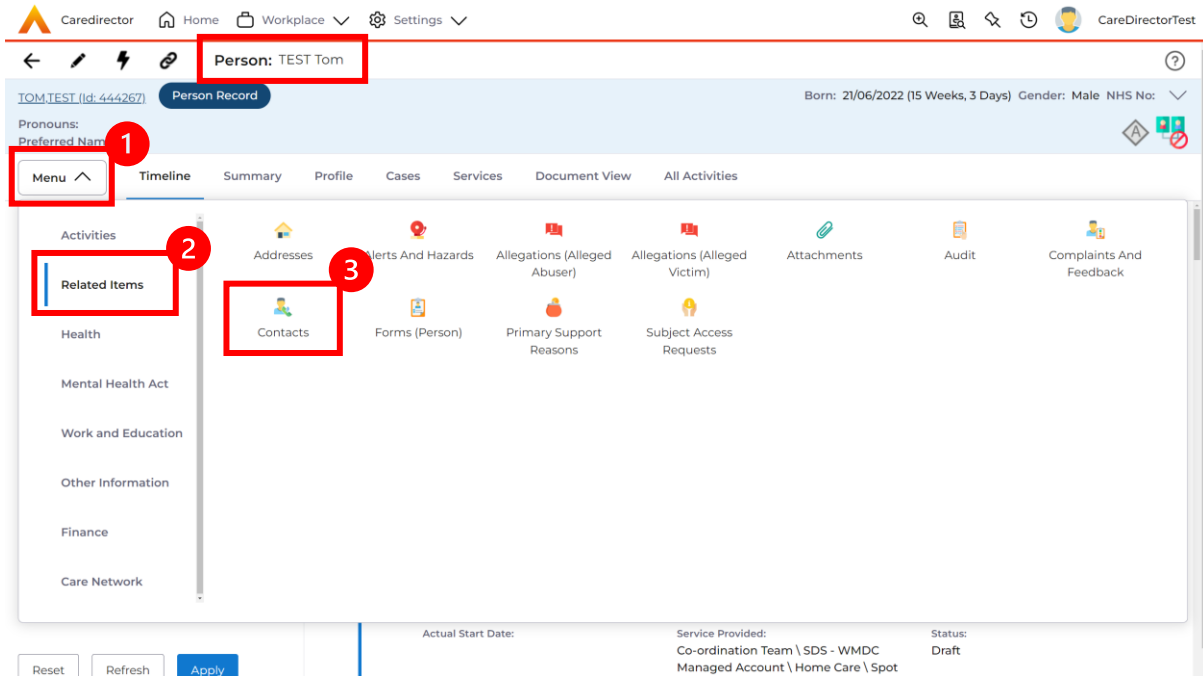
1. A **Contact** can be linked to a **Service User** later when details become known, and they are created into **CareDirector**.
2. After the **Service User** has been created onto the system and the **Contact** is triaged. Locate the **Contact** and under **Regarding** find the created **Service User** using the **Lookup** function.

The screenshot shows the 'Contact Information' section of a CareDirector record. The 'Regarding' field is highlighted with a red box and a '1' in a red circle, indicating the lookup function. The 'Responsible Team' field is also highlighted with a red box and a '1' in a red circle. Other fields include 'Contact Id' (CON-2), 'Responsible User' (Jayne Mullen), 'Date/Time Contact Received' (04/07/2022, 13:39), 'Contact Type' (Telephone), and 'Contact Source' (Individuals - Family/Friend/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 'Contact Source' section of a CareDirector record. The 'Is this Person/ Group aware of the Contact?' field is highlighted with a red box and a '1' in a red circle, indicating the lookup function. The 'Contact Source' field is also highlighted with a red box and a '2' in a red circle. Other fields include 'Contact Made By' (Mr Smith (neighbour)) and 'Does Person/Group agree/support this Contact?' (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

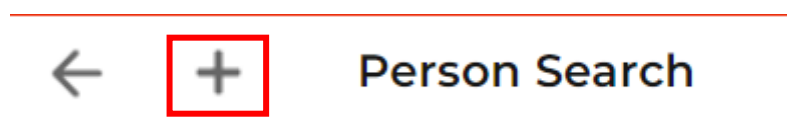
1. Select **Person Search** on the toolbar.



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 displays the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. On the right, there are search and user profile icons, with the text 'CareDirectorTrain' next to the user icon. Below the navigation bar, the page title is 'Person: Tom MullenTest'. A header section contains the 'Person Record' title, the name 'MULLENTEST Tom (Mr) (id: 2)', and personal details: 'Born: 03/05/1912 (110 Years) Gender: Male NHS No:'. There are also icons for a diamond, a green square, and a red circle with a slash. Below the header, a horizontal menu includes 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Care Plans', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is active. On the left side of the timeline, there are input fields for 'From', 'To', 'Team', and 'Profession Type', each with a search icon. Below these fields are 'Reset', 'Refresh', and 'Apply' buttons. The main timeline area shows two events: 'Person Address Created' and 'Person Created', both dated '20/05/2022 08:09:14' and attributed to 'Scott Simpson'. The 'Person Address Created' event details include: Address Type: Primary, Property Type: Privately Owned, and Street: Street and Broadway. The 'Person Created' event details include: Age: 110, Home Phone: (blank), and Mobile Phone: 212-970-4133. At the bottom of the timeline, a message states 'No more records to display'.

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 displays a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' (Yesterday at 15:05) and 'Service Provision Created' (Yesterday at 10:12). Both entries were created by 'Scott Simpson'. The 'Form (Case) Created' entry shows 'Due Date', 'Form Type: AMHP Report Form', and 'Status: In Progress'. The 'Service Provision Created' entry shows 'Actual Start Date', 'Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot', and 'Status: Draft'.

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

The screenshot shows the CareDirector interface for the same person record. The 'Cases' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tabs, there is a search bar for records. A table of related records is displayed, with the first two rows highlighted by a red box and a red circle containing the number '2'. The table columns are: Responsible Team, Responsible User, Case Date/Time, Contact Reason, Case No, Presenting Priority, and Case Status.

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team

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 highlighted with a red box and a circled '1'. Below the tabs, a toolbar contains a plus sign icon, which is highlighted with a red box and a circled '2', representing the 'Create New Record' button. Below the toolbar is a table of related records.

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
<input type="checkbox"/>	CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
<input type="checkbox"/>	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 'Save' button in the top left corner is highlighted with a red box and a circled '1'. The form is titled 'Details' and contains the following fields:

- Case No ***: Empty text input field.
- Person ***: Dropdown menu showing 'Tom MullenTest'.
- Case Date/Time ***: Two date and time pickers. The date is '07/10/2022' and the time is '09:00'.
- Initial Contact**: Empty text input field.
- Date/Time Contact Received ***: Two date and time pickers. The date is '06/10/2022' and the time is '11:00'.
- Contact Received By ***: Dropdown menu showing 'Scott Simpson'.
- Contact Reason ***: Dropdown menu showing 'A - Adult Safeguarding'.
- Presenting Priority**: Empty text input field.
- Additional Information**: Empty text area.
- Referral Reason**: Empty text area.

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
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team

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

Case Priority

Responsible User

Responsible Team *
AMHP Coordinator

Review Date

Last Assigned to Team Date
20/09/2022

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 currently set to 'Assign To Team'. A red box with a '1' callout highlights the 'Details' tab, and another red box with a '2' callout highlights the magnifying glass icon next to the 'Case Status' field.

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

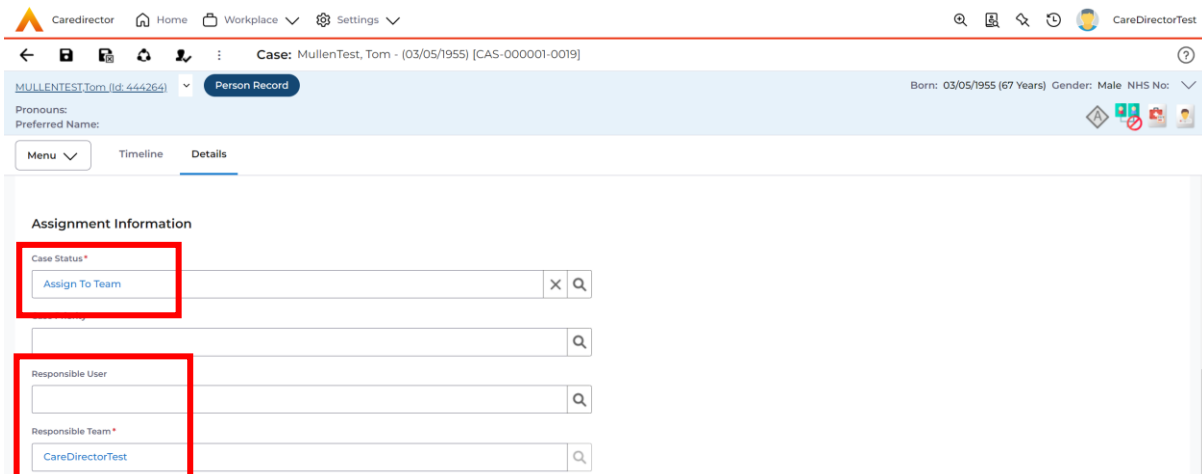
The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search criteria section is highlighted with a red box and a '1' callout. The dialog box contains a table of case status options:

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

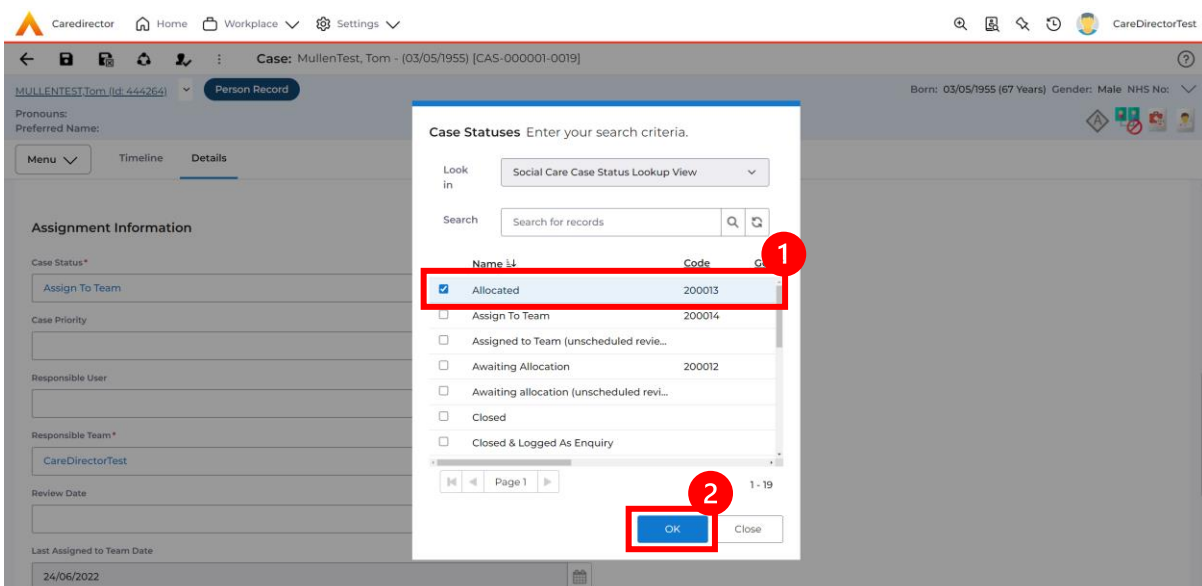
The 'OK' button is highlighted with a red box and a '2' callout.

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*

🔍 1

The screenshot shows the 'System Users' dialog box. At the top, there is a search bar labeled 'Enter your search criteria.' (1). Below it, a dropdown menu is open, showing 'My Business Unit Users' selected. Underneath, there are sections for 'System Views' (Active Managers, Deactivated Users, Lookup View) and 'My Business Unit Users' (My Default Team, My Record). A list of users follows, with 'CareLiveInternal Wak...' (2) highlighted. At the bottom right, there is an 'OK' button (3) and a 'Close' button. The background shows the 'Assignment Information' section of a case record.

- 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 of the case record. The 'Responsible User*' field is populated with 'Scott Simpson'. The 'Responsible Team*' is 'CareDirectorTest'. The 'Review Date' is '24/06/2022'. In the top toolbar, the 'Save' button (1) is highlighted with a red box. The background shows the 'Assignment Information' section of a case record.

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 record. The 'Assignment Information' section contains the following fields:

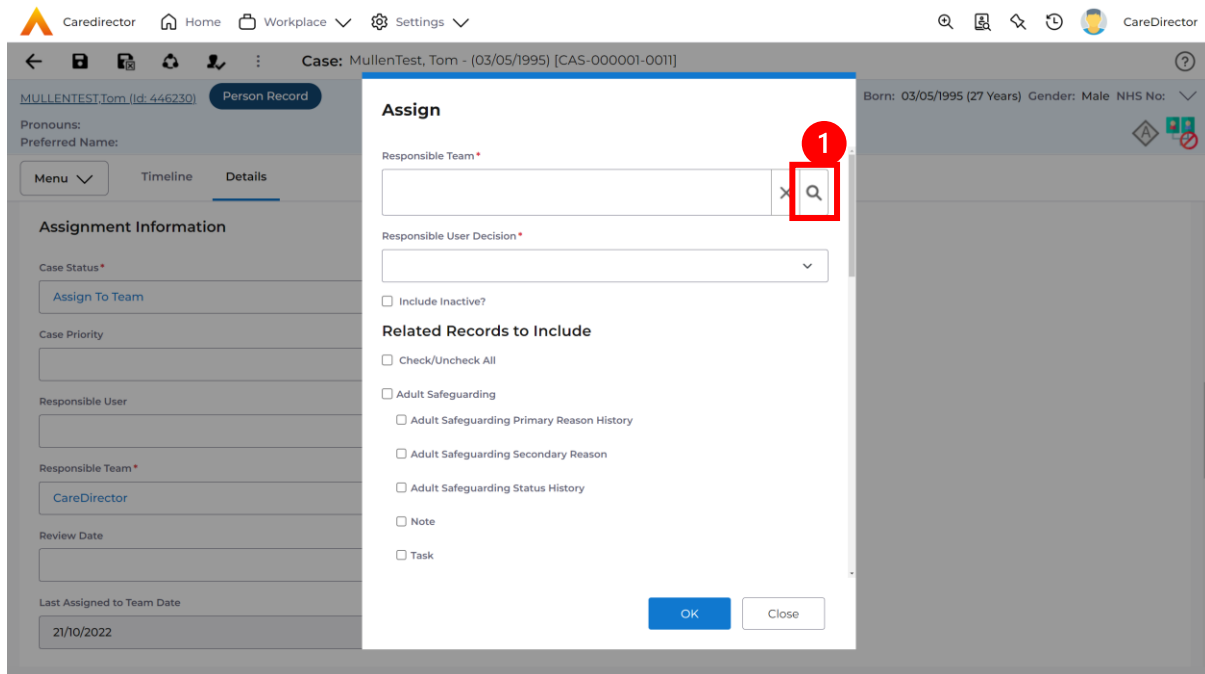
- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this field, with a '1' in a red circle next to it.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A dropdown menu showing 'Scott Simpson'. A red box highlights this field, with a '2' in a red circle next to it.
- 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.

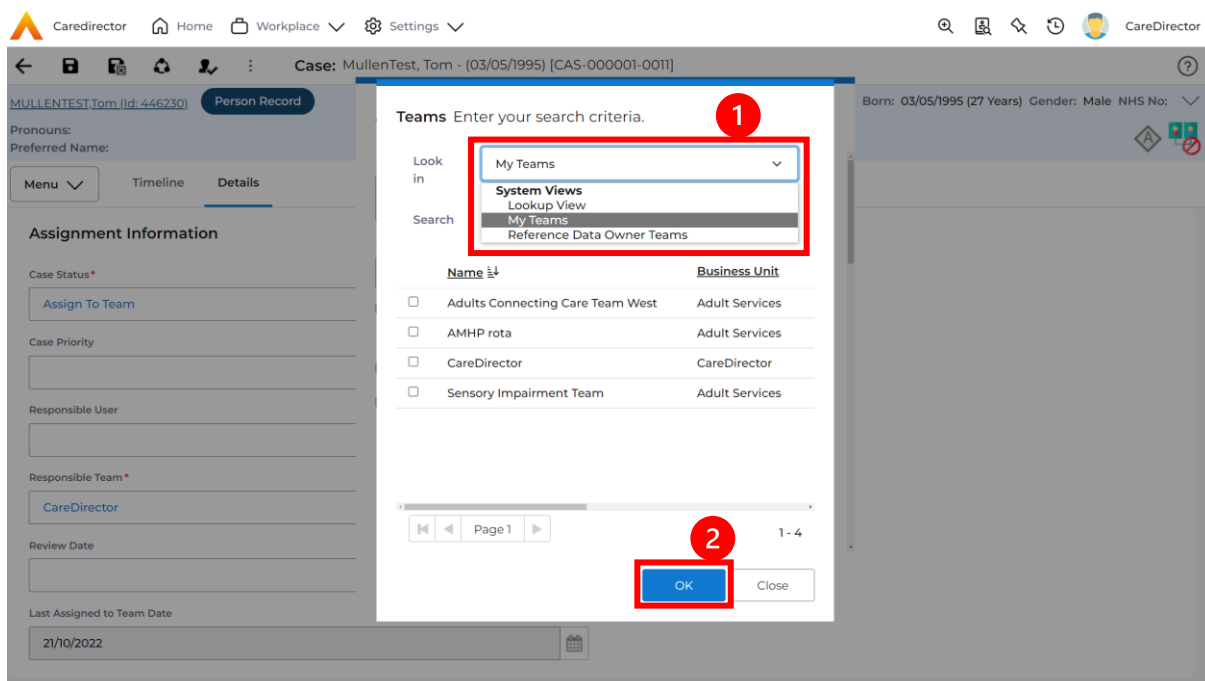
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this field, with a '1' in a red circle next to it.
- 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 next to it.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.

- 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**.

The screenshot shows the 'Assign' modal in the CareDirector system. The modal is titled 'Assign' and is used to assign a team and a responsible user to a case. The case name is 'MullenTest, Tom - (03/05/1995) [CAS-000001-0011]'. The modal contains the following fields and options:

- Responsible Team ***: A dropdown menu with 'Sensory Impairment Team' selected.
- Responsible User Decision ***: A dropdown menu with 'Do not change' selected. This field is highlighted with a red box.
- Include Inactive?**: A checkbox that is currently unchecked.
- Related Records to Include**: A list of checkboxes for selecting related records:
 - Check/Uncheck All
 - Adult Safeguarding
 - Adult Safeguarding Primary Reason History
 - Adult Safeguarding Secondary Reason
 - Adult Safeguarding Status History
 - Note

At the bottom of the modal are 'OK' and 'Close' buttons. In the background, the 'Person Record' for 'MULLENTTEST Tom (Id: 446230)' is visible, with the 'Responsible User' field highlighted by a red box.

- 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.

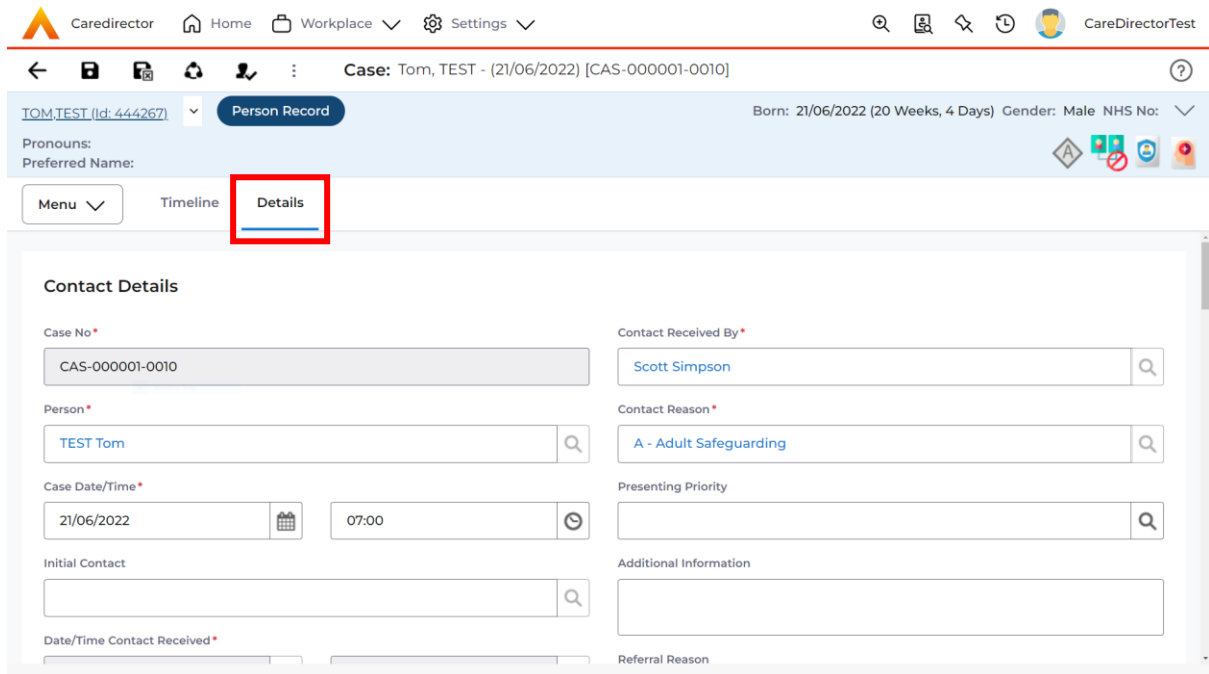
<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...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

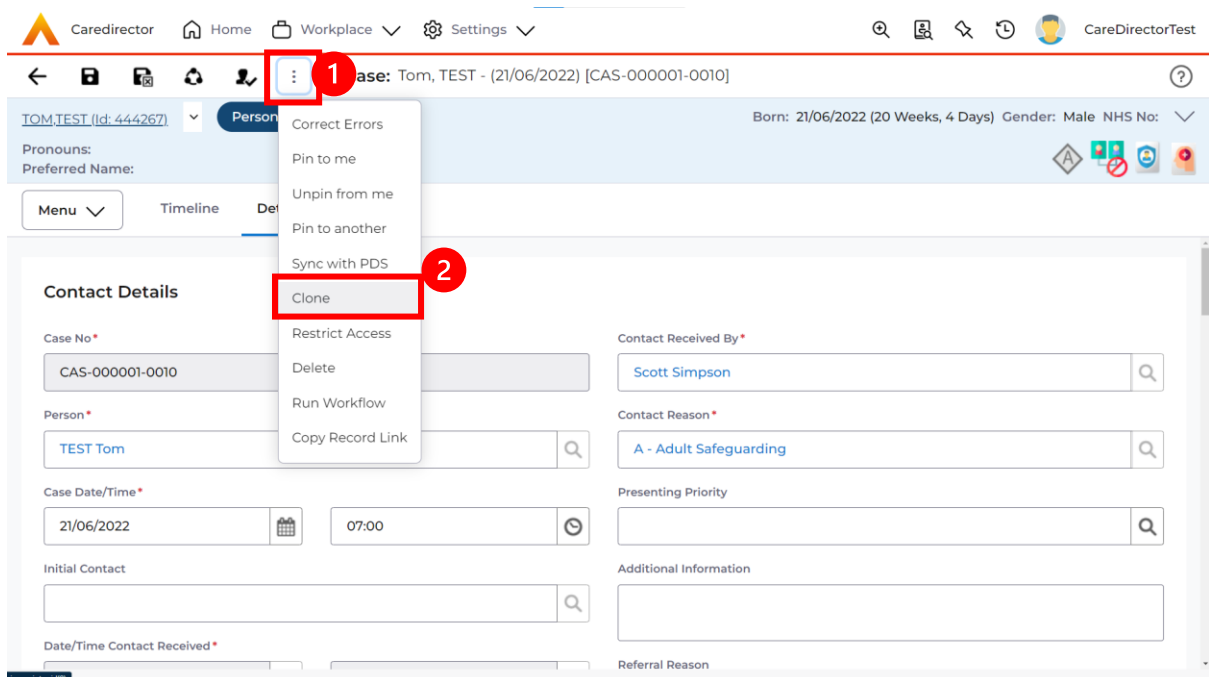
The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a red circle containing the number '1', and the 'Involvement Member' field is highlighted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

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**.

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

Keyword: [input field]

Activity Type: All [dropdown]

Date Type: Created Date [dropdown]

From: 02/10/2022 [calendar icon]

To: 01/11/2022 [calendar icon]

Actual End (From): [input field] [calendar icon]

Clear Filters | **Search**

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

- 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 ^ Timeline Details

- Activities
- Appointments
- Case Notes
- Emails
- Letters
- Phone Calls
- Tasks

Related Items

Other information

Responsible User [input field] [search icon]

Responsible Team* [input field: AMHP Coordinator] [search icon]

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 Timeline Details

+ [dropdown: Tasks]

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

<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...	

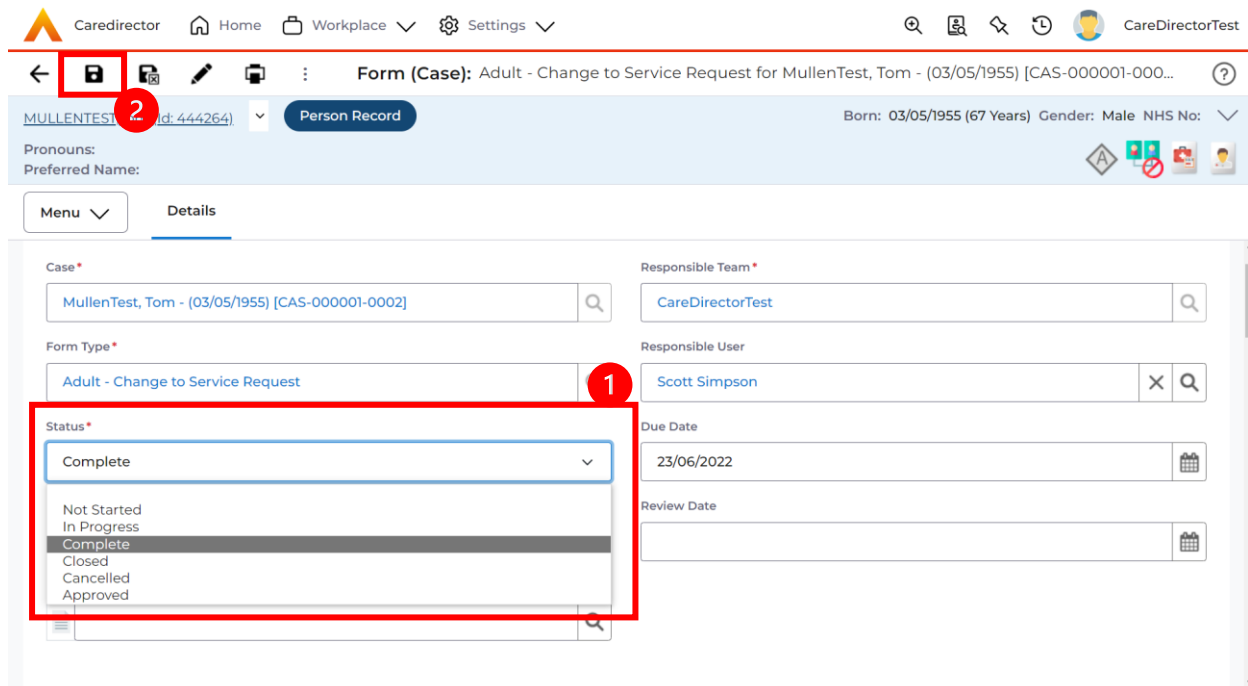
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the CareDirector web interface. At the top, there is a navigation bar with 'Caredirector' and 'Home Workplace Settings' menus. A red box with a '2' highlights the 'Save' button in the top left. Below this is a breadcrumb trail: 'Case Note (For Case): New'. The main content area is titled 'Person Record' for 'TOM.TEST (id: 444267)'. It shows personal details like 'Born: 21/06/2022 (14 Weeks, 6 Days)' and 'Gender: Male'. Below this is a 'Details' section with a form. The form has several fields: 'Case *' (filled with 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'), 'Responsible Team *' (filled with 'CareDirectorTest'), 'Responsible User' (filled with 'Scott Simpson'), 'Reason', 'Priority', 'Date *', 'Status *' (set to 'Open'), 'Category', 'Sub-Category', and 'Outcome'. A red box with a '1' highlights the 'Responsible User' field. At the bottom left of the form, it says 'Contains Information Provided By A Third Party?'.

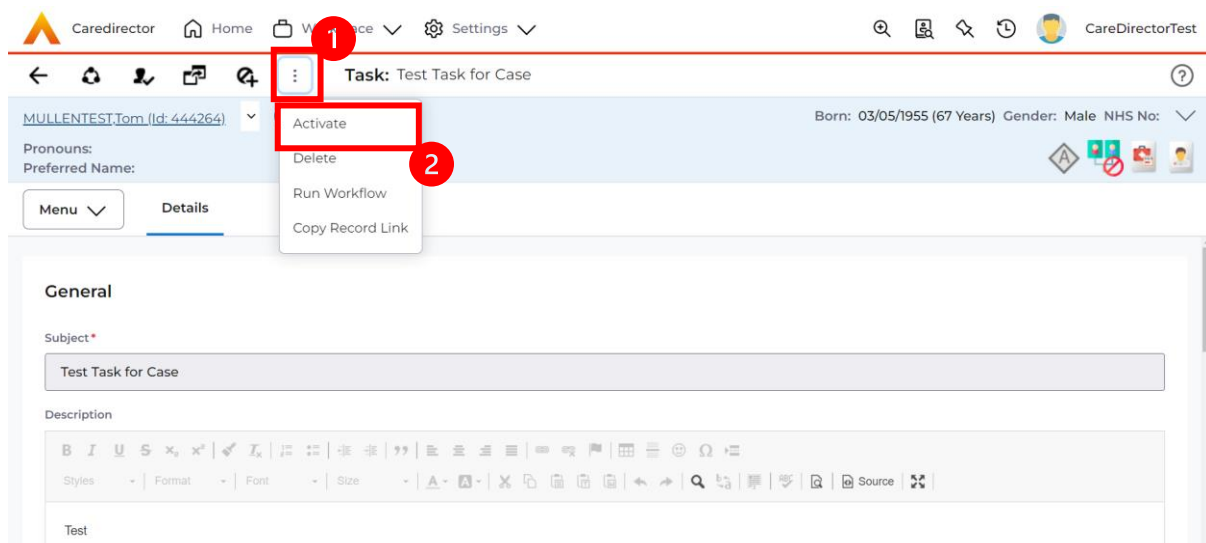
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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**.

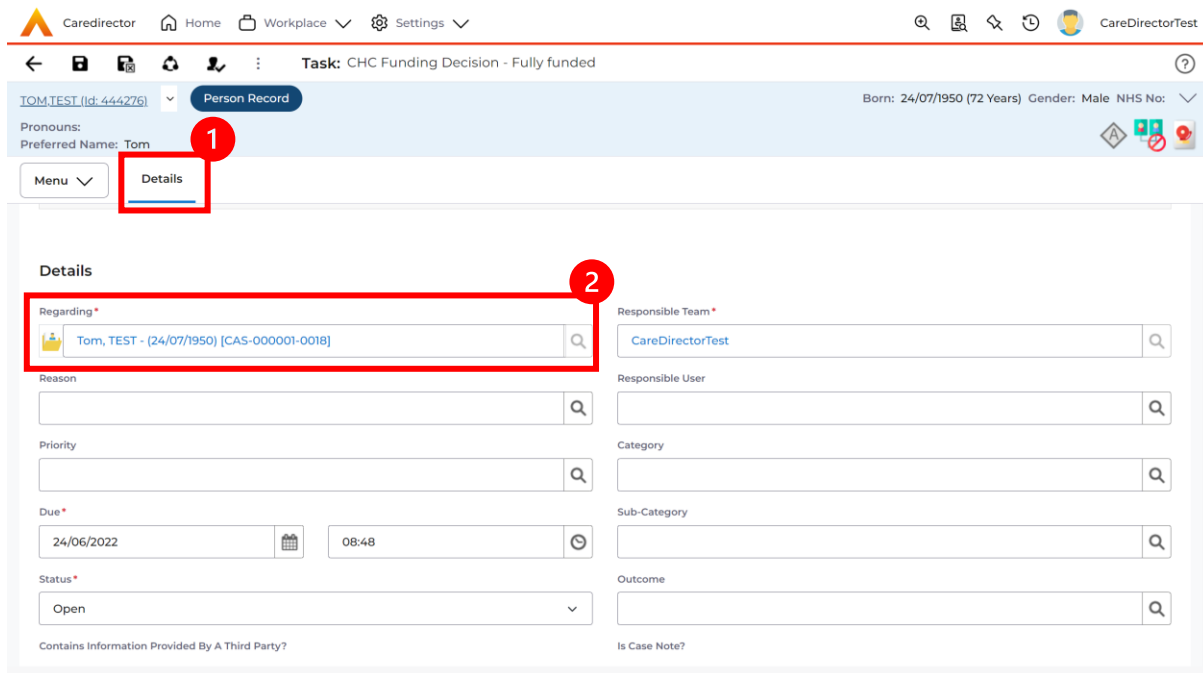


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

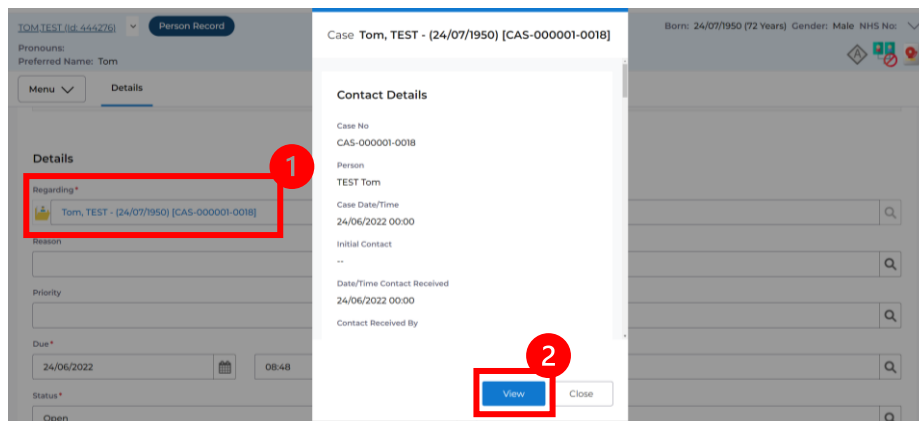


How to tell if an Activity is linked to a Case or Person Record

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.

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' selected. 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 dialog box also shows a search bar, a table of teams, and pagination controls (Page 1, 1-4).

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 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom - (03/05/1995) [id: 446230]'. The 'Details' section contains several fields: 'Regarding' (with a red box and '2'), 'Responsible Team' (Sensory Impairment Team), 'Responsible User' (Scott Simpson, with a red box and '1'), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Category', 'Sub-Category', and 'Outcome'. There are also radio buttons for 'Contains Information Provided By A Third Party?' and 'Is Case Note?'.

How to Allocate an existing Activity to another team

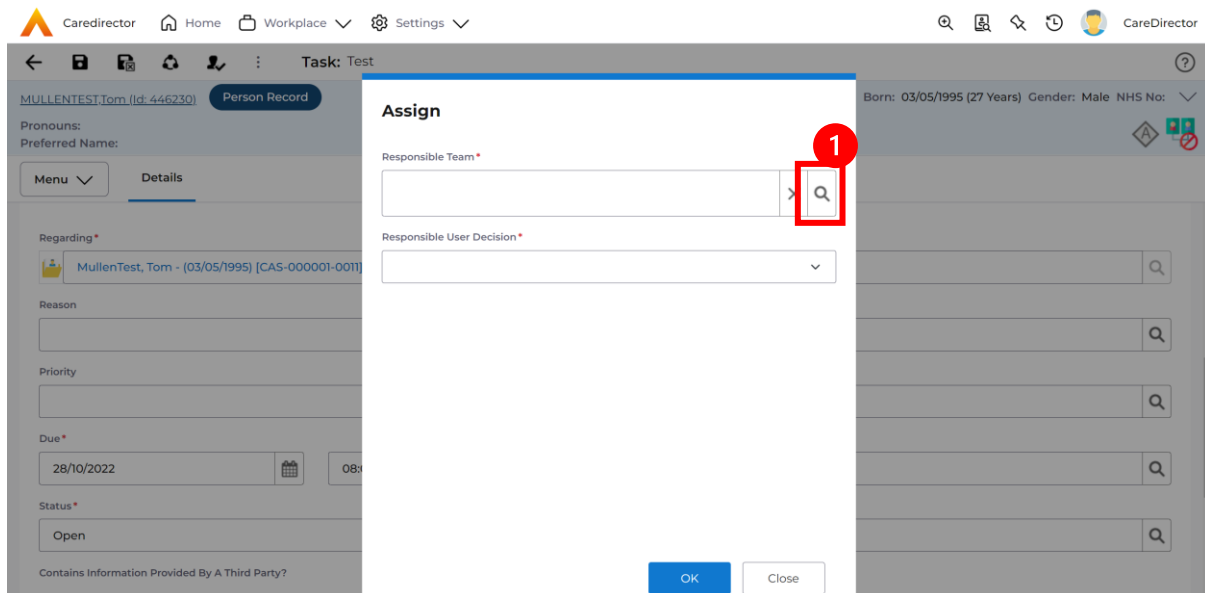
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The record details include 'MULLENTTEST, Tom (Id: 446230)', 'Person Record', 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. The 'Details' section contains several fields: 'Regarding*' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Responsible Team*' (Sensory Impairment Team), 'Reason', 'Responsible User' (Scott Simpson), 'Priority', 'Category', 'Due*' (28/10/2022, 08:00), 'Sub-Category', 'Status*' (Open), and 'Outcome'. A red box highlights the 'X' icon in the 'Responsible User' field, with a red circle containing the number '1' next to it.

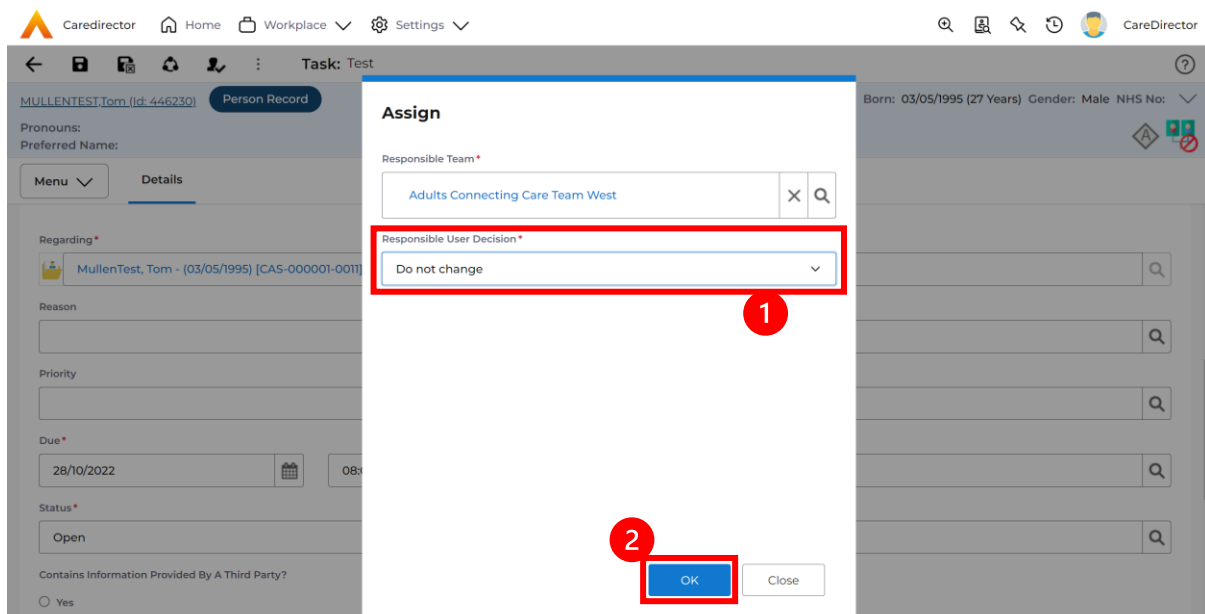
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for the same task record. The top navigation bar is the same. The task title is 'Task: Test'. The record details are the same. The 'Details' section contains the same fields as the previous screenshot. A red box highlights the 'Assign' icon in the toolbar, with a red circle containing the number '1' next to it.

- 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.



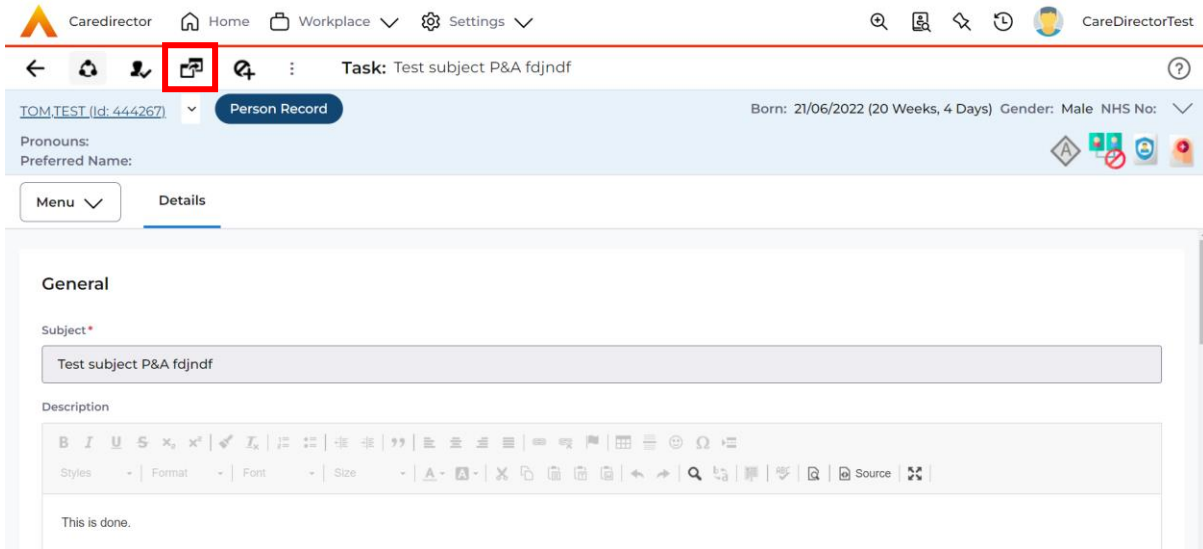
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



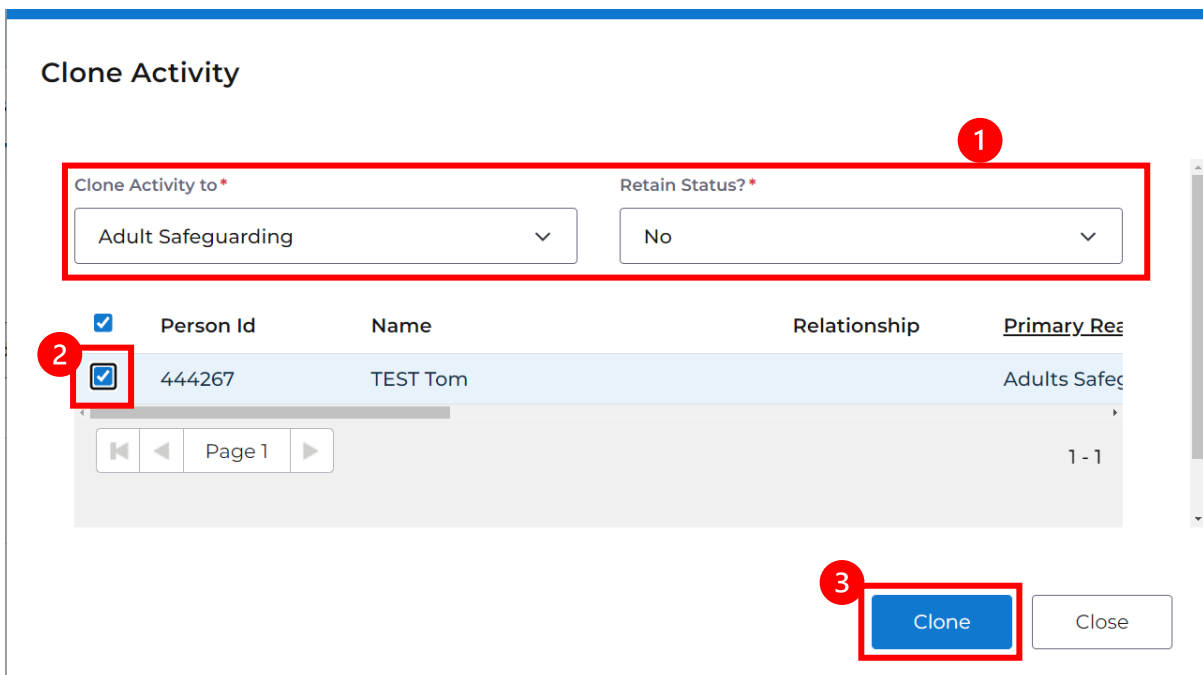
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

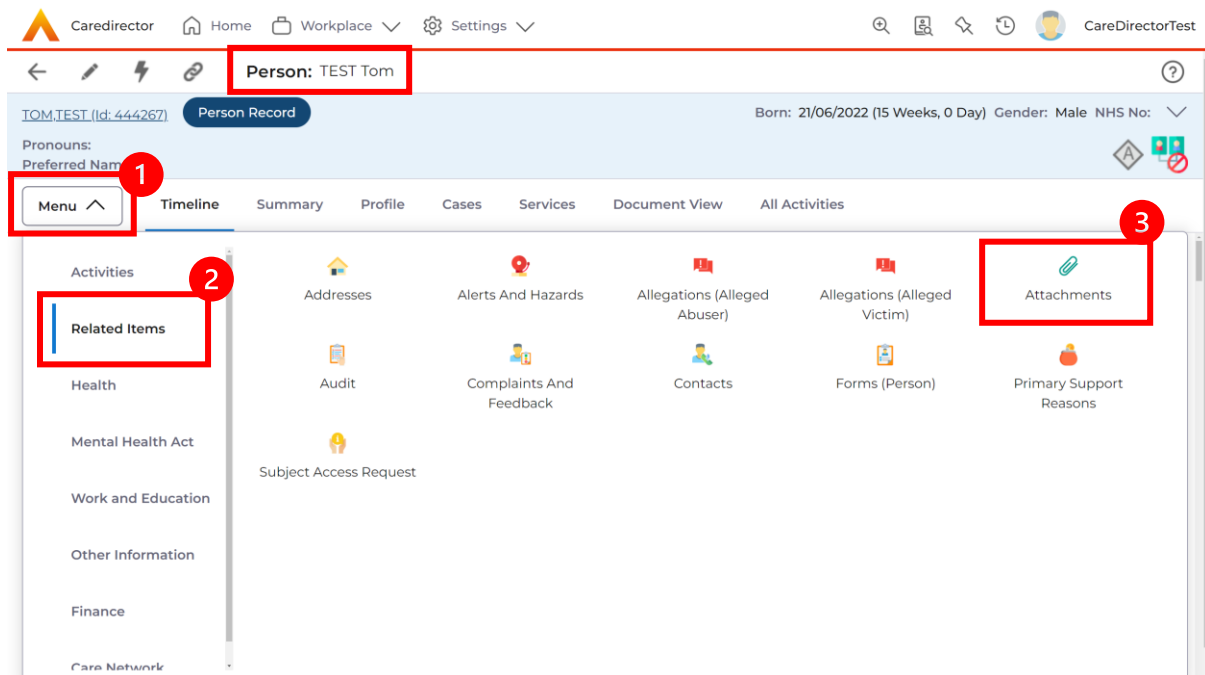


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

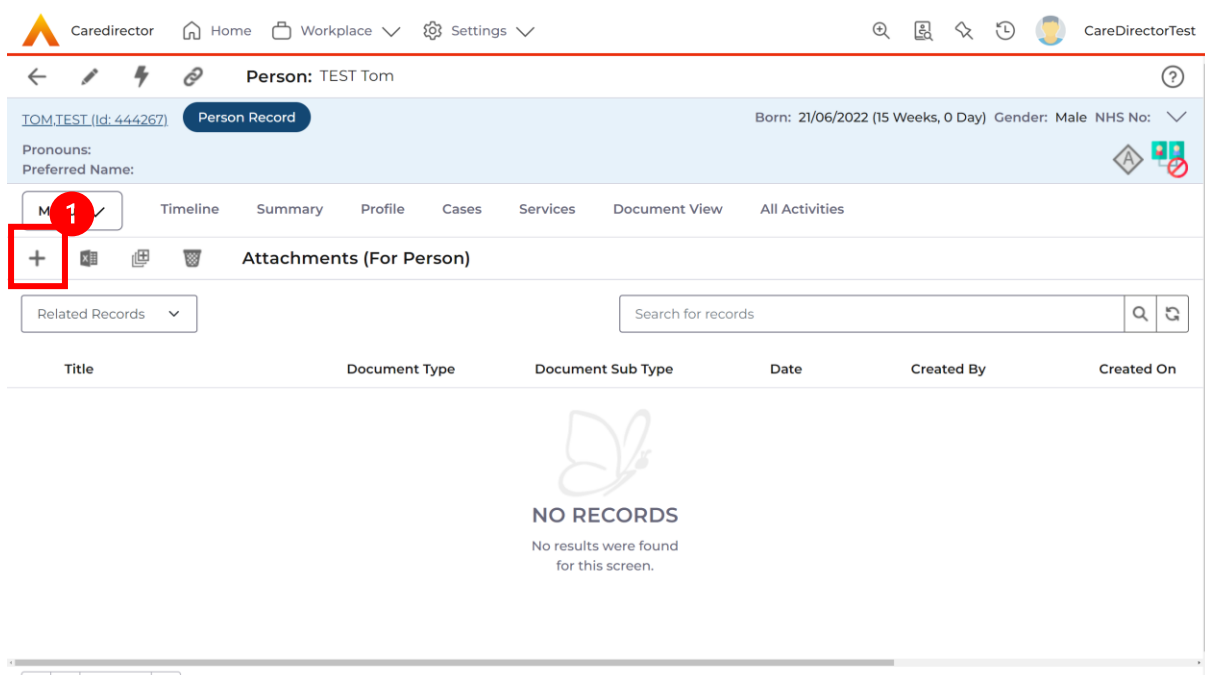


How to upload Attachments

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**.



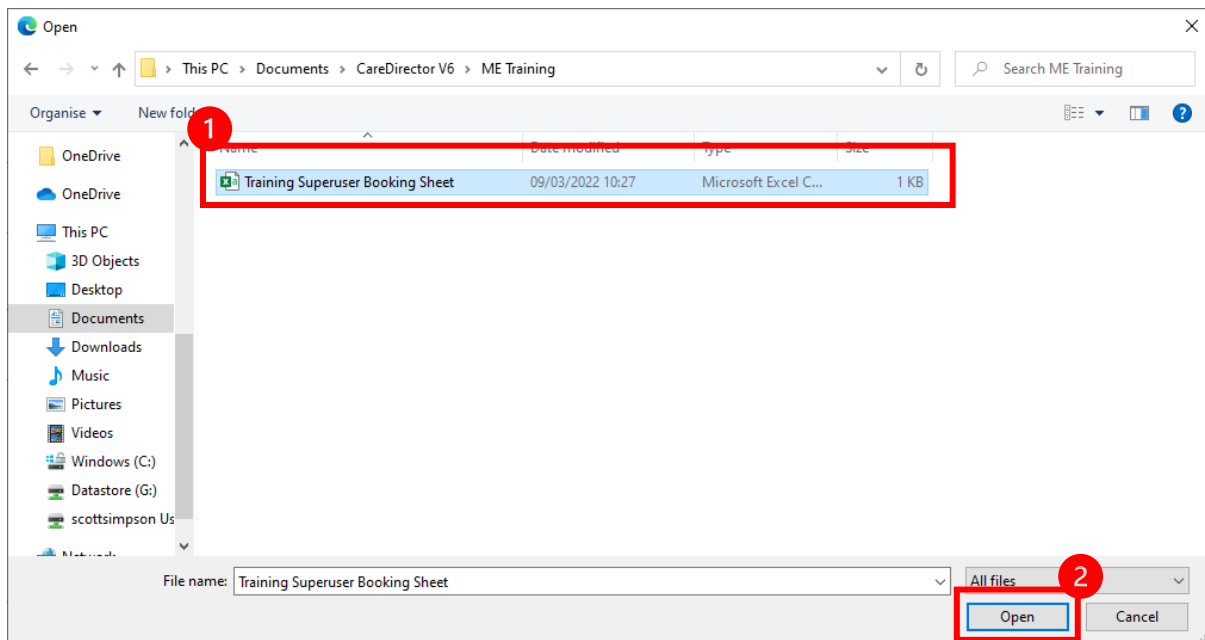
2. When opened, select the **Create New Record** from the toolbar.



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

The screenshot shows the 'Attachment (For Person): New' form in CareDirector. The 'File' field is highlighted with a red box and a red circle containing the number '1', with the 'Browse' button also highlighted. Other fields include Person (TEST Tom), Responsible Team (CareDirectorTest), Title (Test Document Upload), Date (04/10/2022), Document Type (Clients), and Declared (No).

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

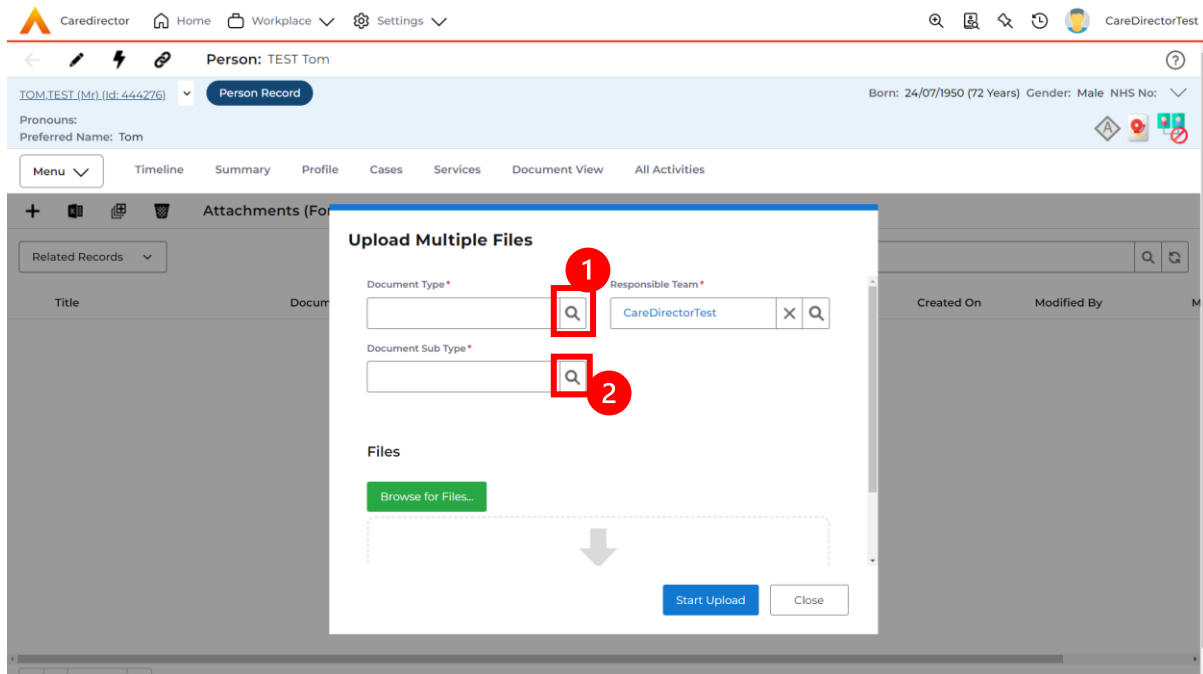
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.

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 record is for 'Person: TEST Tom' (ID: 444267), born 21/06/2022, male. The 'Menu' is open, showing options like 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Related Items' section is expanded, showing various categories like 'Activities', 'Addresses', 'Alerts And Hazards', etc. The 'Attachments' option is highlighted with a red box and a '3' in a red circle. A red box with a '1' highlights the 'Menu' button, and another red box with a '2' highlights the 'Related Items' section.

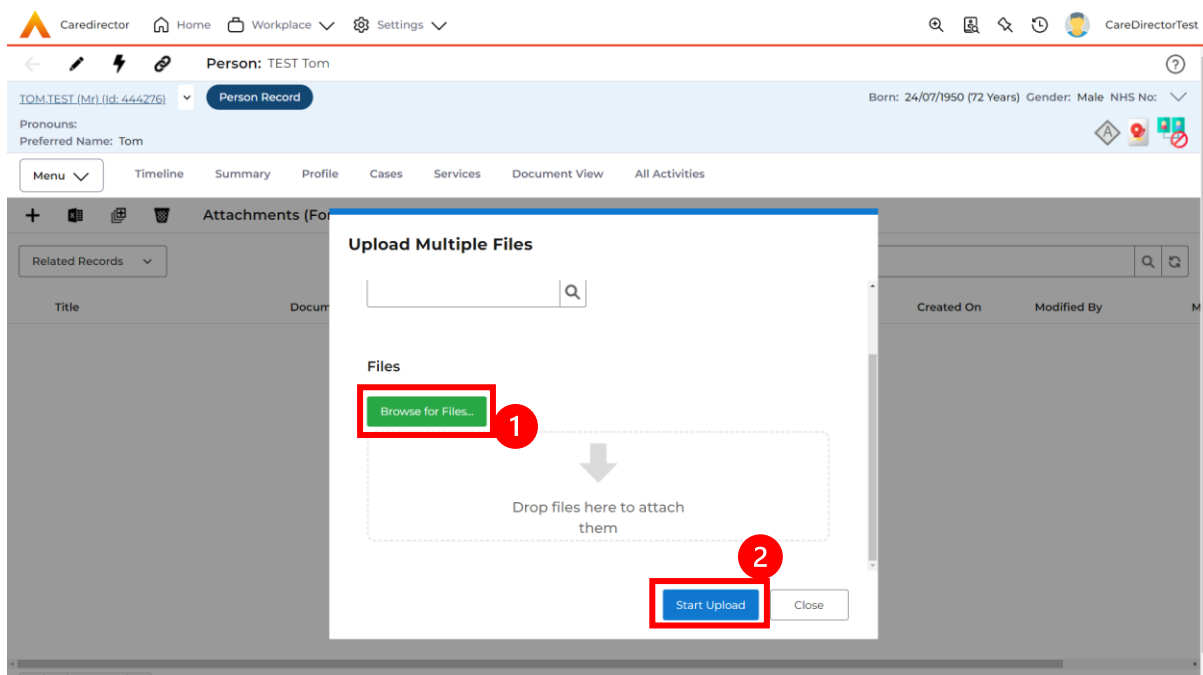
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.

The screenshot shows the 'Attachments (For Person)' screen. The top navigation bar is the same as in the previous screenshot. The 'Menu' is open, and the 'Upload Multiple Files' icon (a document with a plus sign) is highlighted with a red box and a '1' in a red circle. Below the toolbar, there is a search bar for records and a table with columns: 'Title', 'Document Type', 'Document Sub Type', 'Date', 'Created By', and 'Created On'. The table is currently empty, and a message reads: 'NO RECORDS No results were found for this screen.'

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



- 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)**.

The screenshot shows the CareDirector interface for a case. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box and a '1'. The 'Menu' dropdown is highlighted with a red box and a '2', and 'Related Items' is selected. The 'Forms (Case)' option is highlighted with a red box and a '3'. 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. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is visible. The 'Forms (Case)' section is active, showing 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 [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

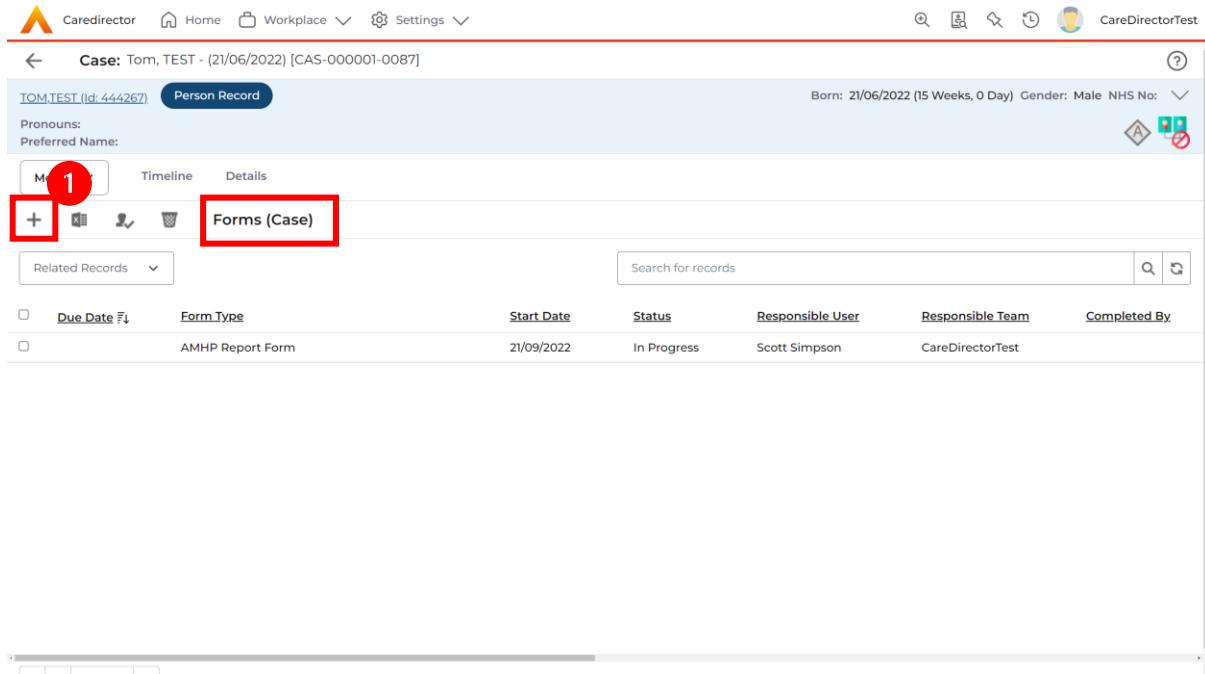
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

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

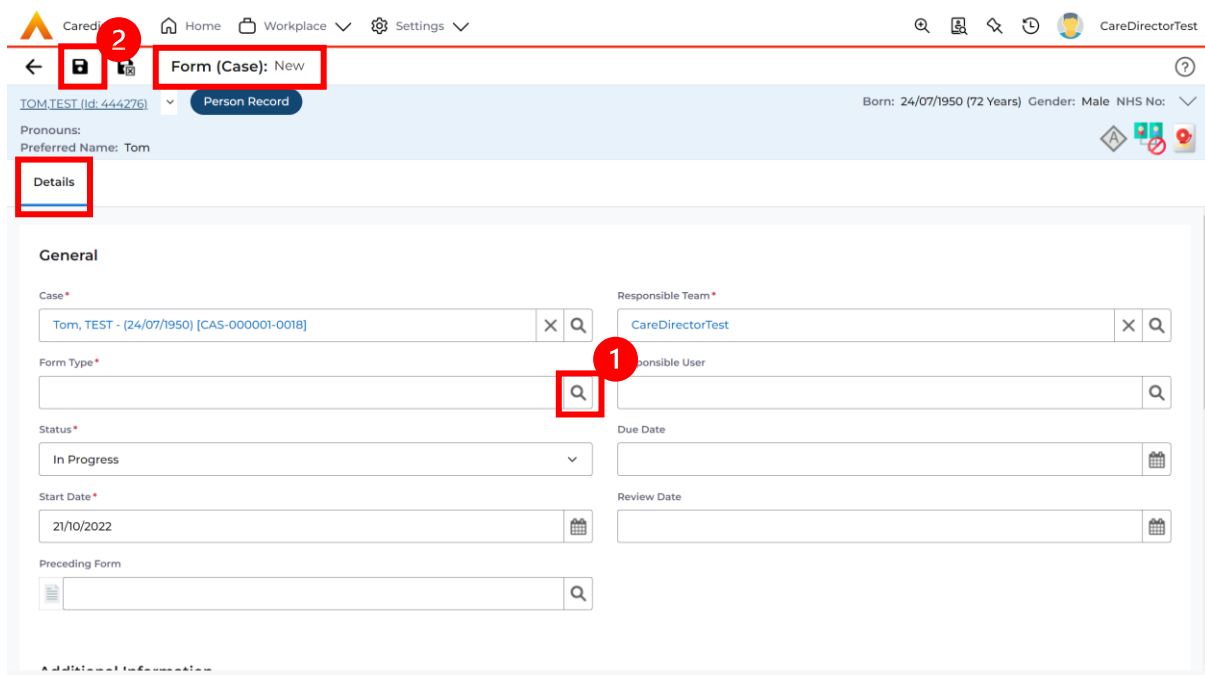
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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.

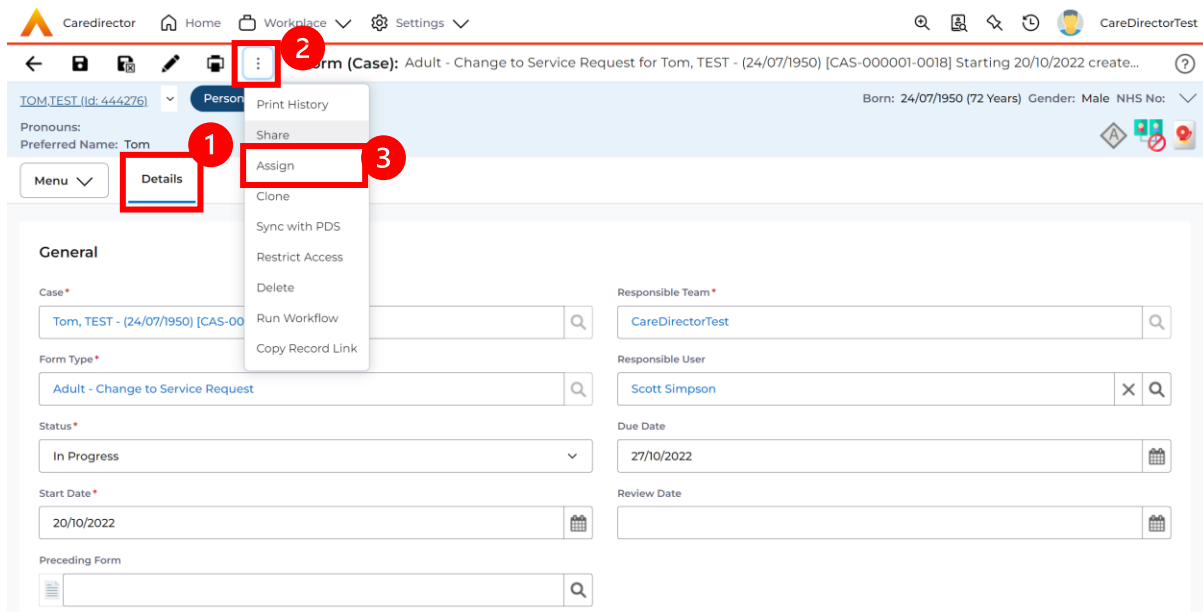
The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The toolbar at the top contains several icons, with the "Edit" icon (a pencil) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022 (15 Weeks, 0 Day)", and gender "Male". The main form area is titled "General" and contains several 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", "Review Date", and "Preceding Form".

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

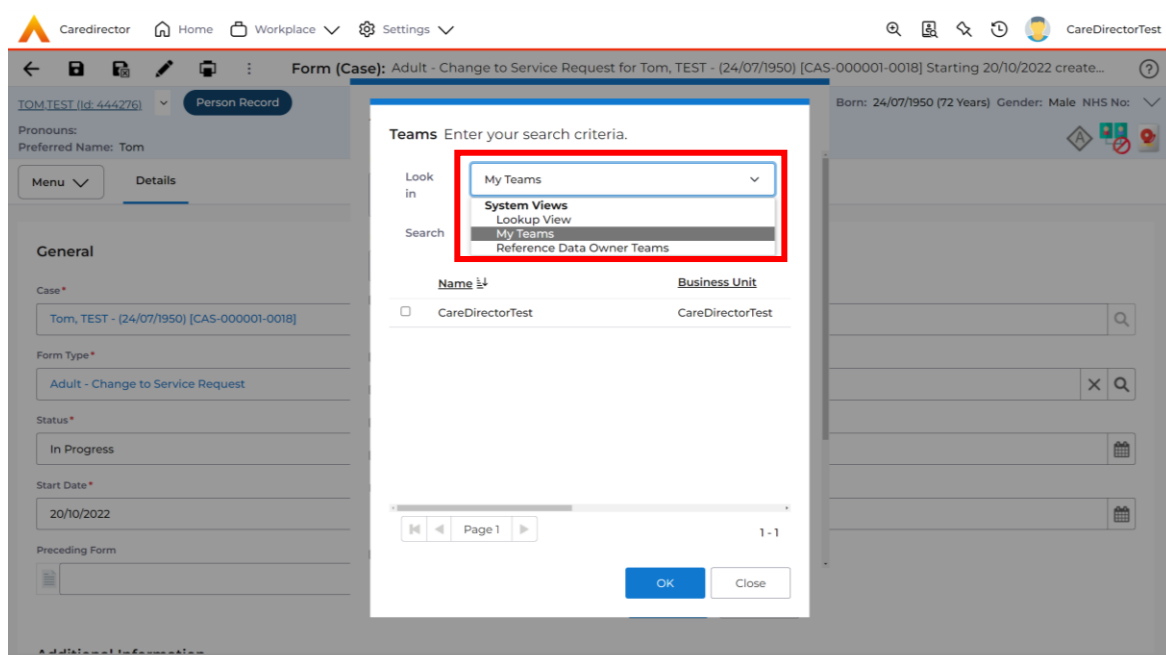
The screenshot shows the CareDirector interface for the "AMHP Report Form". The toolbar at the top contains several icons, with the "Save" icon (a floppy disk) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022 (15 Weeks, 0 Day)", and gender "Male". The main form area is titled "AMHP Report Form" and contains several 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 radio buttons for "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.



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**.

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 box containing 'Accommodation Team'.
- Responsible User Decision ***: A dropdown menu with 'Clear on current record only' selected.
- Include Inactive?**: A checkbox that is unchecked.
- Related Records to Include**: A list of checkboxes, all of which are checked:
 - Check/Uncheck All
 - Appointment
 - Assessment Factor
 - Attachment (Case Form)
 - Email
 - Email Attachment
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

How to Clone a Form

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

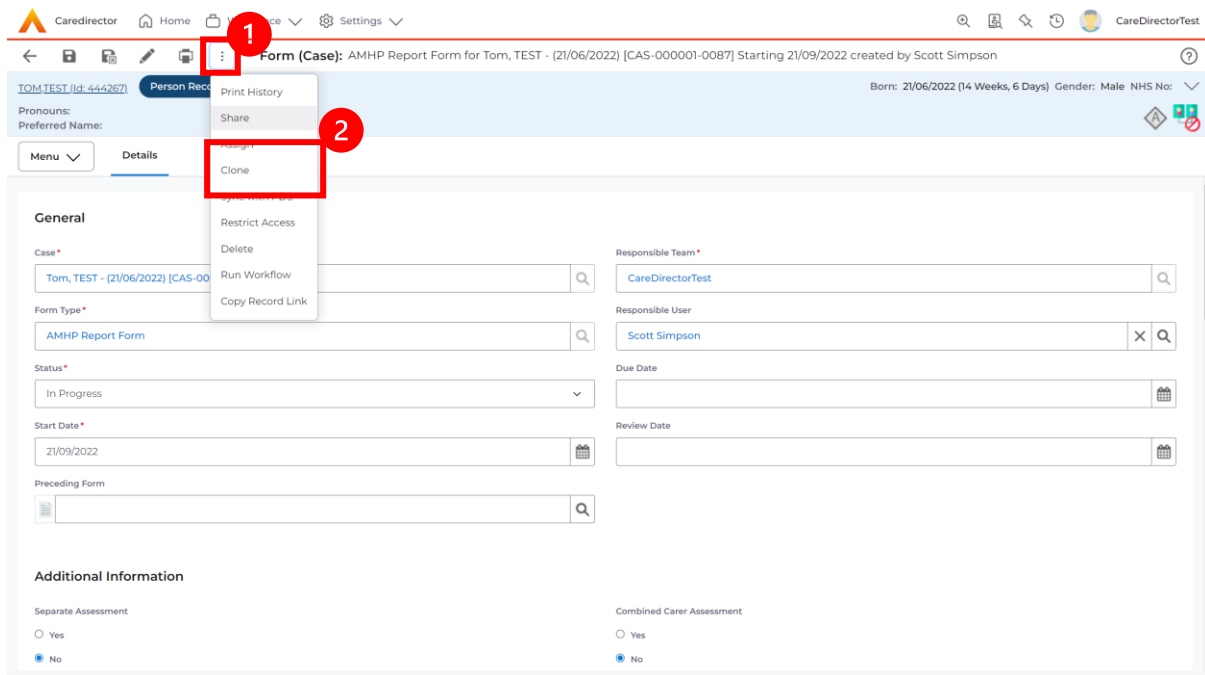
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' dropdown. The main content area shows a timeline 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.

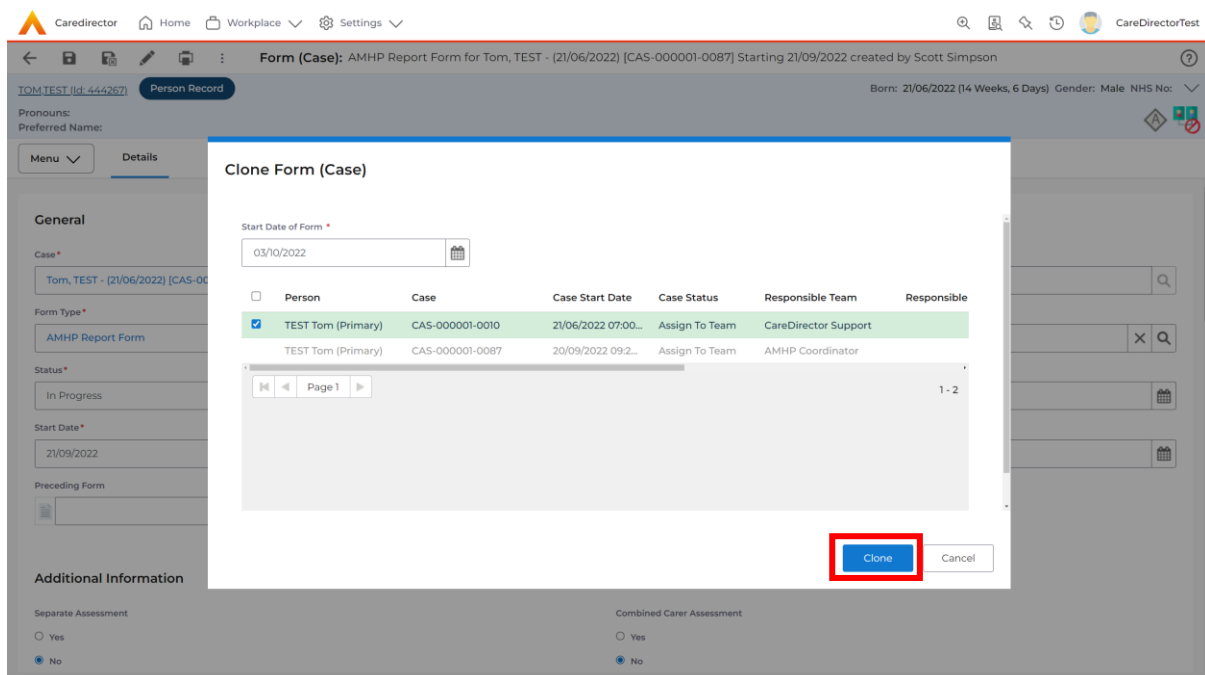
The screenshot shows the CareDirector interface for the 'Forms (Case)' page. The 'Related Records' dropdown is open, and the 'AMHP Report Form' is selected. The table below shows the details of the selected form.

	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		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 for a form titled "Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087]". The user is logged in as "CD V6 Team". The form details are as follows:

General	
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	
Responsible Team*	CareDirectorTest
Responsible User	Scott Simpson
Due Date	11/11/2022
Review Date	
Completion Details	
Completed By*	Scott Simpson
Signed Off By*	Scott Simpson
Completion Date*	09/11/2022
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.

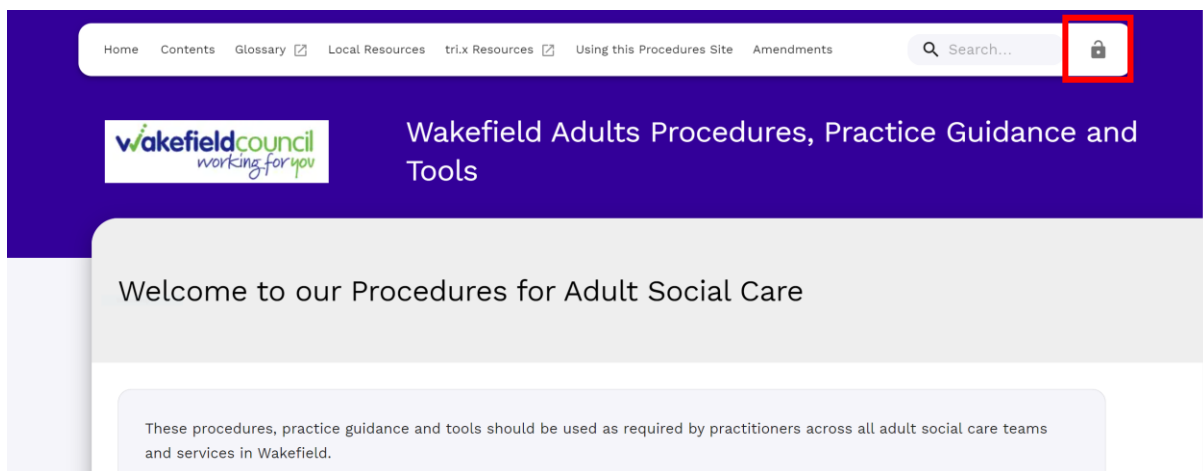
The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area displays the details of a form for 'Tom, TEST - (21/06/2022) [CAS-000001-0010]'. The form is currently in a 'Closed' status. The 'Form Type' is 'Occupational Therapy Conversation Record'. Other details include 'Responsible Team: CareDirectorTest', 'Responsible User: Scott Simpson', 'Due Date: 20/12/2022', and 'Start Date: 10/11/2022'.

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

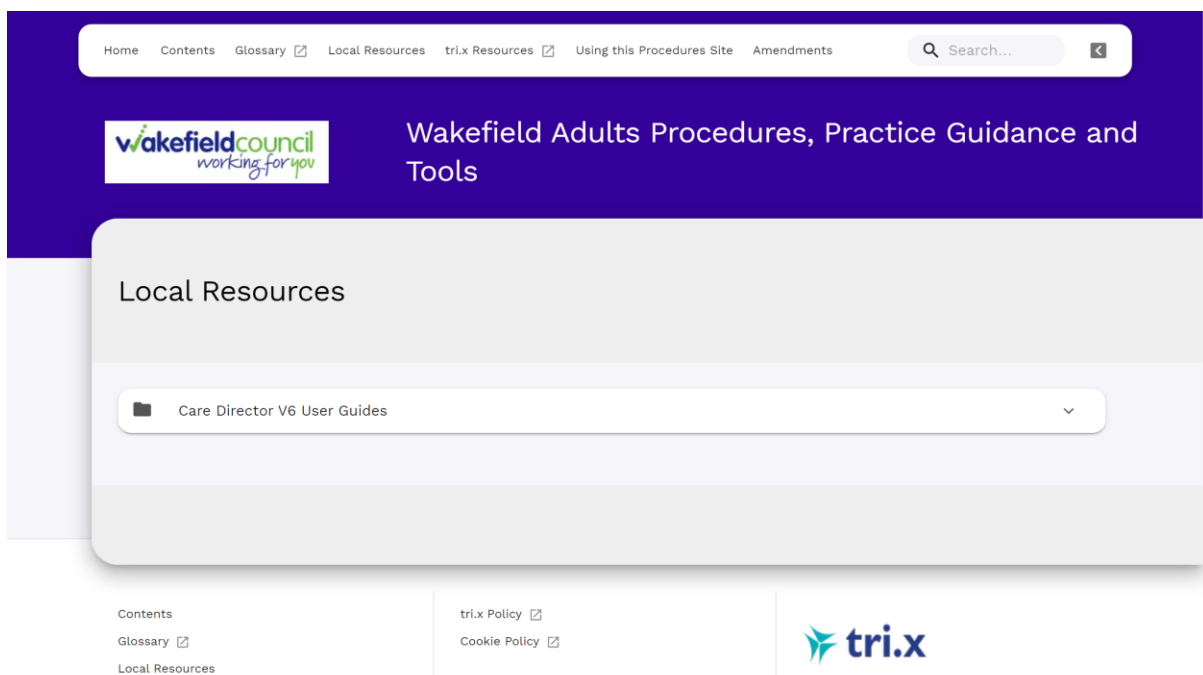
This screenshot shows the same form as the previous one, but with the three-dot menu icon in the breadcrumb trail highlighted with a red circle '1'. A dropdown menu is open, showing options: 'Share', 'Assign', 'Clone', 'Restrict Access', 'Activate', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Activate' option is highlighted with a red circle '2'.

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