



Wakefield District Domestic Abuse Service (WDDAS) V1.0

Document	CareDirector Wakefield District Domestic Abuse Service (WDDAS)
Purpose	Wakefield District Domestic Abuse Service (WDDAS) daily tasks on CareDirector.
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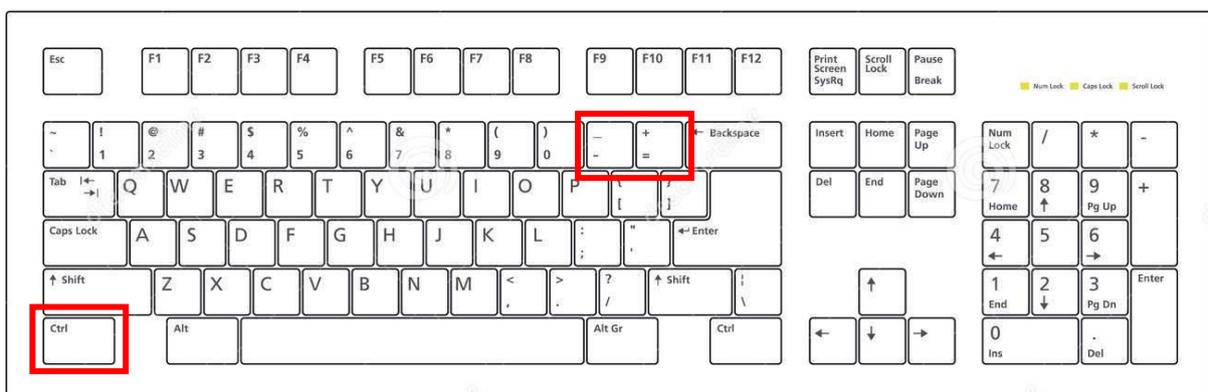
Guide Information

Before Live Access...

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

Guide Navigation

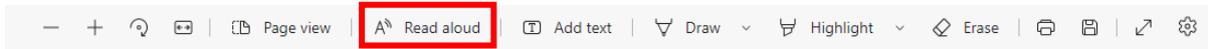
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



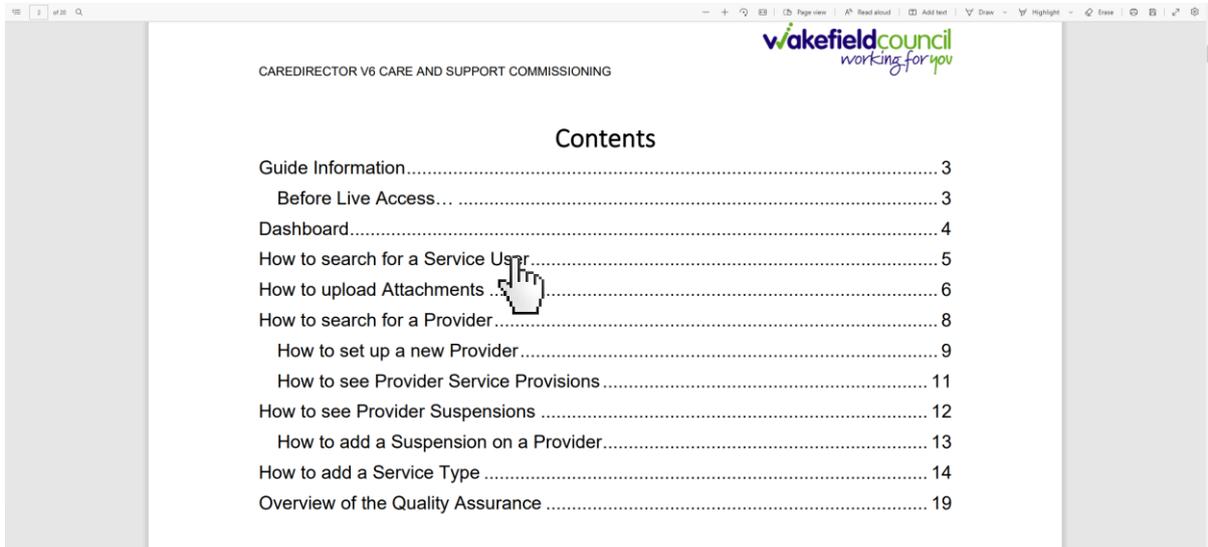
3. To put pages next to one another, select the **Page View** icon on the toolbar.



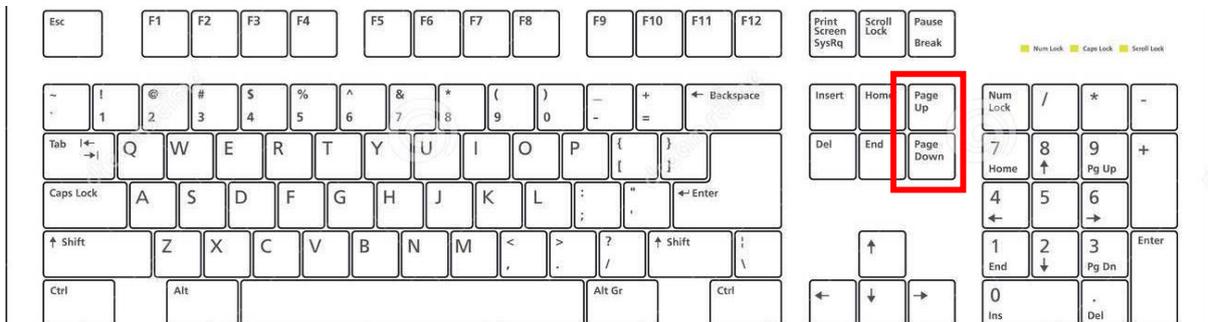
4. For auditory assistance, select **Read Aloud** from the toolbar.



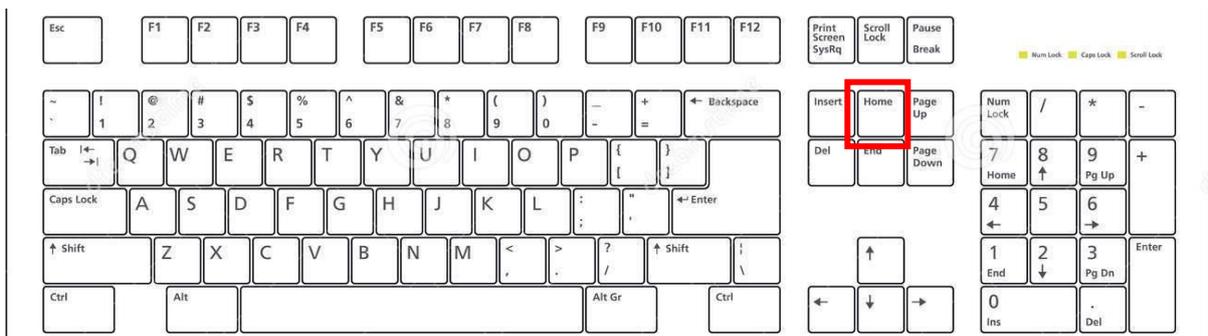
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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

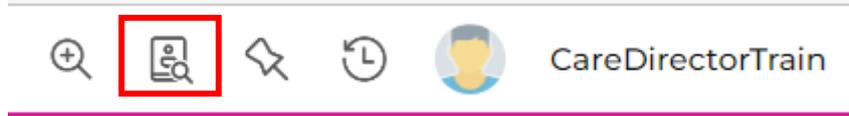


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



How to search for a Service User

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



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

Caredirector Home Workplace Set

← + Searches Before Create Allowed : 1

First Name
Tom

Middle Name

Last Name
MullenTest

Stated Gender

NHS No.

DOB

Use Date of Birth Range

Date of Birth From

Date of Birth To

Clear Filters Search

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

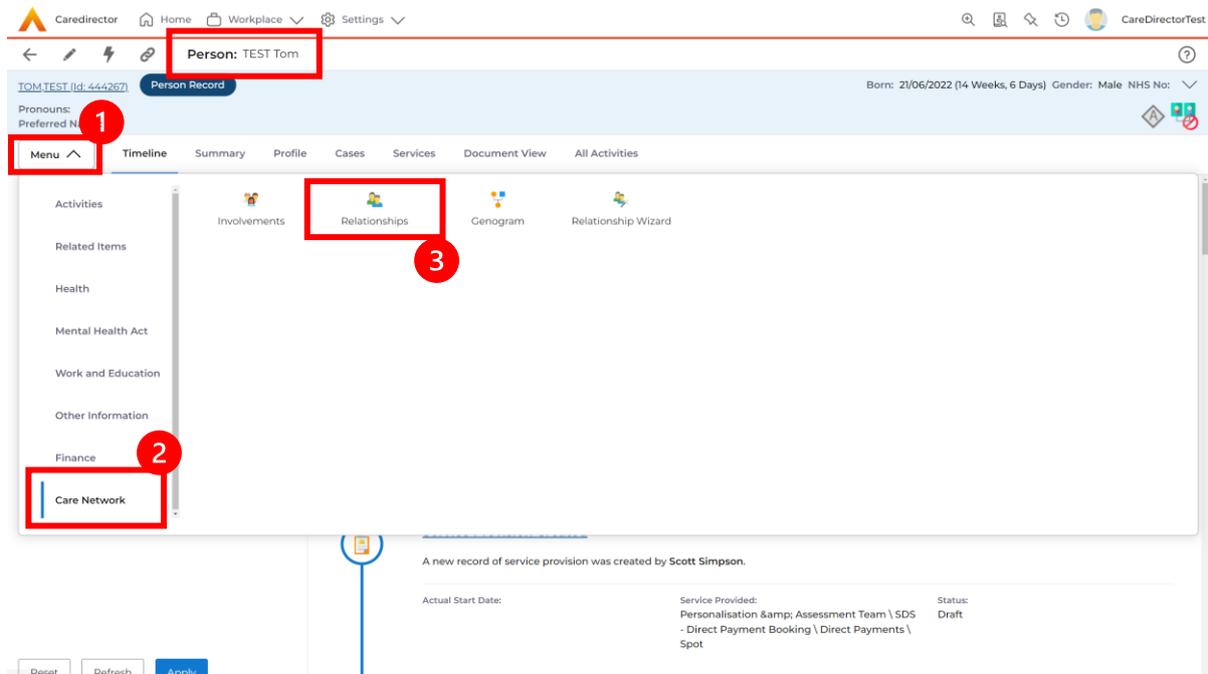
Updating Person Details

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

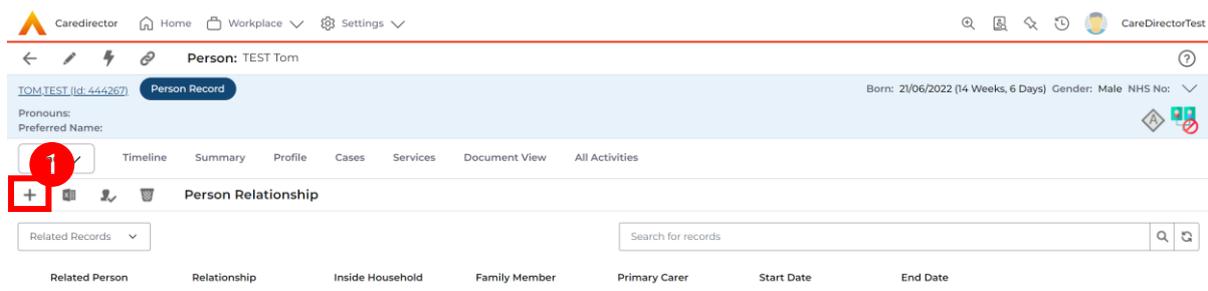
2. This will open the **Person Creation Screen**. Scroll down and edit the details required. When finished, select **Save and Return to Previous Page**.

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.

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 create a Person Record

Duplicate Detection

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

←
+
Searches Before Create Allowed : 1

First Name

Middle Name

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



Adding a Person Record

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



2. Search person to check for record.

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

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



4. The Person: New record is displayed.

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

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

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

The screenshot shows the CareDirector software interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. On the right, there are search and user icons, and the text 'CareDirectorTrain'. Below the navigation bar, the page title is 'Person: Tom MullenTest'. A header section displays 'Person Record' and 'MULLENTEST Tom (Mr) (id: 2)'. To the right of the header, it shows 'Born: 03/05/1912 (110 Years) Gender: Male NHS No:'. Below the header, there is a 'Menu' dropdown and a 'Timeline' tab. The main content area shows a vertical timeline with two events: 'Person Address Created' and 'Person Created', both dated '20/05/2022 08:09:14'. The 'Person Address Created' event includes details for 'Address Type: Primary', 'Property Type: Privately Owned', and 'Street: Street and Broadway'. The 'Person Created' event includes details for 'Age: 110', 'Home Phone:', and 'Mobile Phone: 212-970-4133'. At the bottom of the main content area, there is a button that says 'No more records to display'. On the left side of the main content area, there are input fields for 'From', 'To', 'Team', and 'Profession Type', along with 'Reset', 'Refresh', and 'Apply' buttons.

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**.

Person: TEST Tom

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

Menu Timeline Summary Profile **Cases** Services Document View All Activities

Filter By [dropdown]

From [calendar icon]

To [calendar icon]

Team [search icon]

Profession Type [search icon]

Reset Refresh Apply

OCT 2022

Form (Case) Created Yesterday at 15:05

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

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

Service Provision Created Yesterday at 10:12

A new record of service provision was created by **Scott Simpson**.

Actual Start Date: [blank] Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot Status: Draft

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

Person: TEST Tom

TOM.TEST (Id: 444267) 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

+ [icons] Cases

Related Records [dropdown] Search for records [search icon]

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

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 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**.

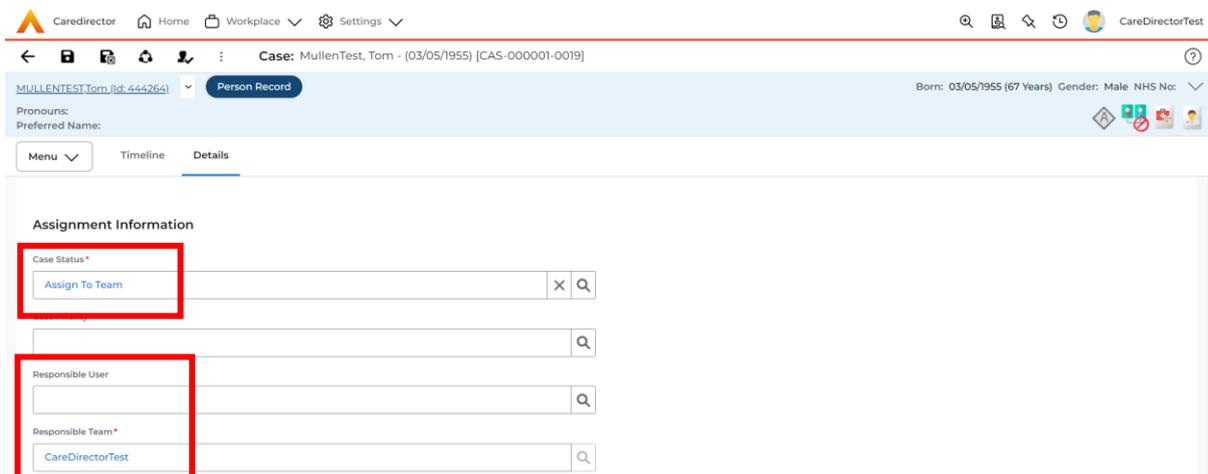
The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The 'Search' field contains 'Search for records'. A table lists the following options:

<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...		

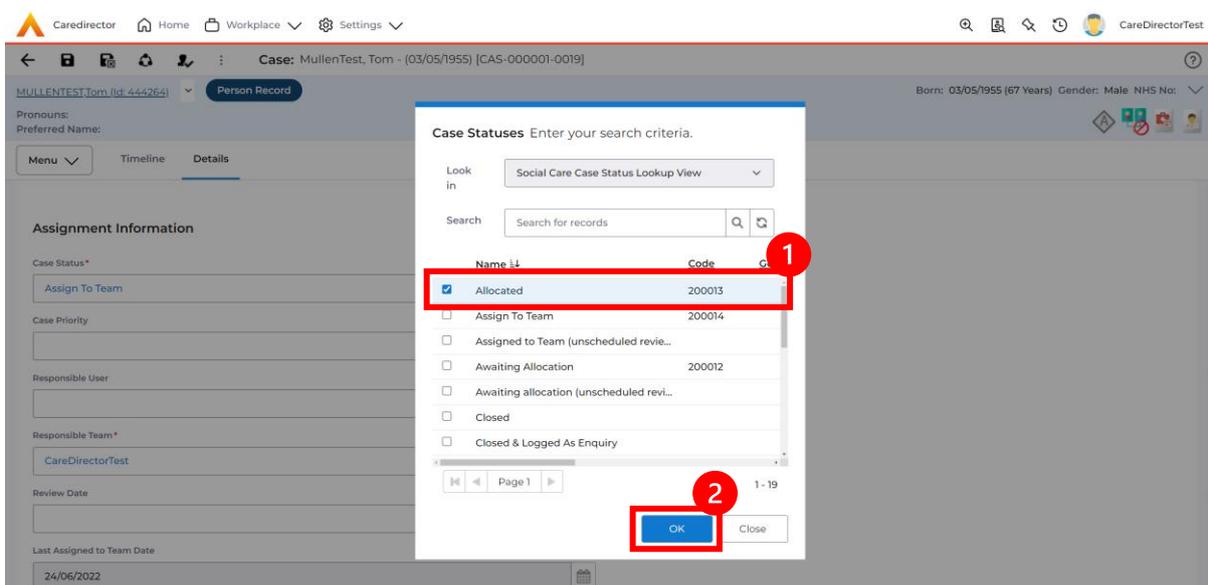
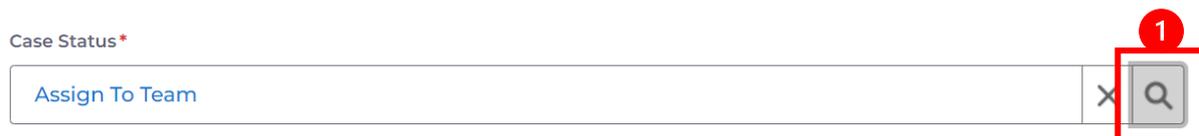
The first row, 'Allocated', is highlighted with a red box and a '1' callout. The 'OK' button at the bottom of the dialog is highlighted with a red box and a '2' callout.

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*

🔍

The screenshot shows the 'System Users' dialog box with the following elements:

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

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

- Case Status*: Allocated
- Case Priority: [Empty]
- Responsible User*: [Empty]
- Responsible Team*: CareDirectorTest
- Review Date: [Empty]
- List Assigned to Team Date: 24/06/2022

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

The screenshot shows the 'Assignment Information' section with the following fields:

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

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

How to send a Case to another team

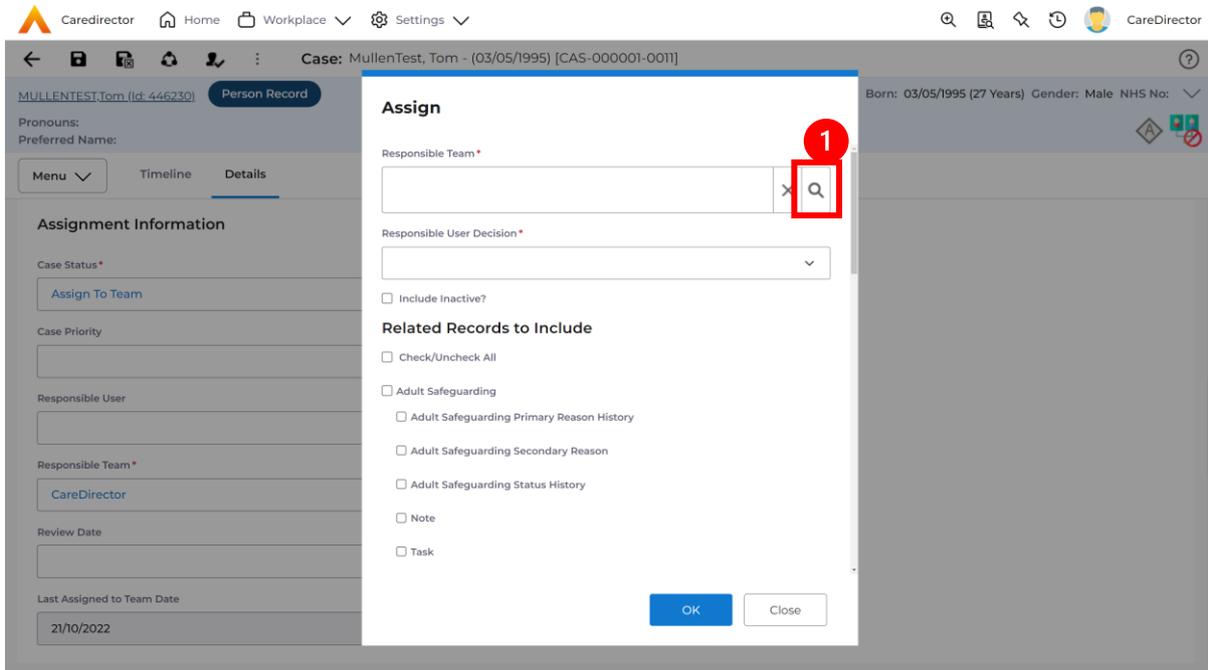
1. There may be reasons that a **Case** needs to be sent to another team.
2. Locate the **Case** that requires assigning to another team, if this **Case** has a **Responsible User**, then it will have the **Case Status** of **Allocated**.
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save**.

The screenshot shows the 'Assignment Information' form in CareDirector. The 'Case Status' dropdown menu is open and set to 'Assign To Team', with a red box and a '1' in a red circle highlighting the dropdown arrow. The 'Responsible User' field contains 'Scott Simpson' and is highlighted with a red box and a '2' in a red circle. Other fields include 'Case Priority', 'Responsible Team' (set to 'CareDirector'), and 'Review Date'.

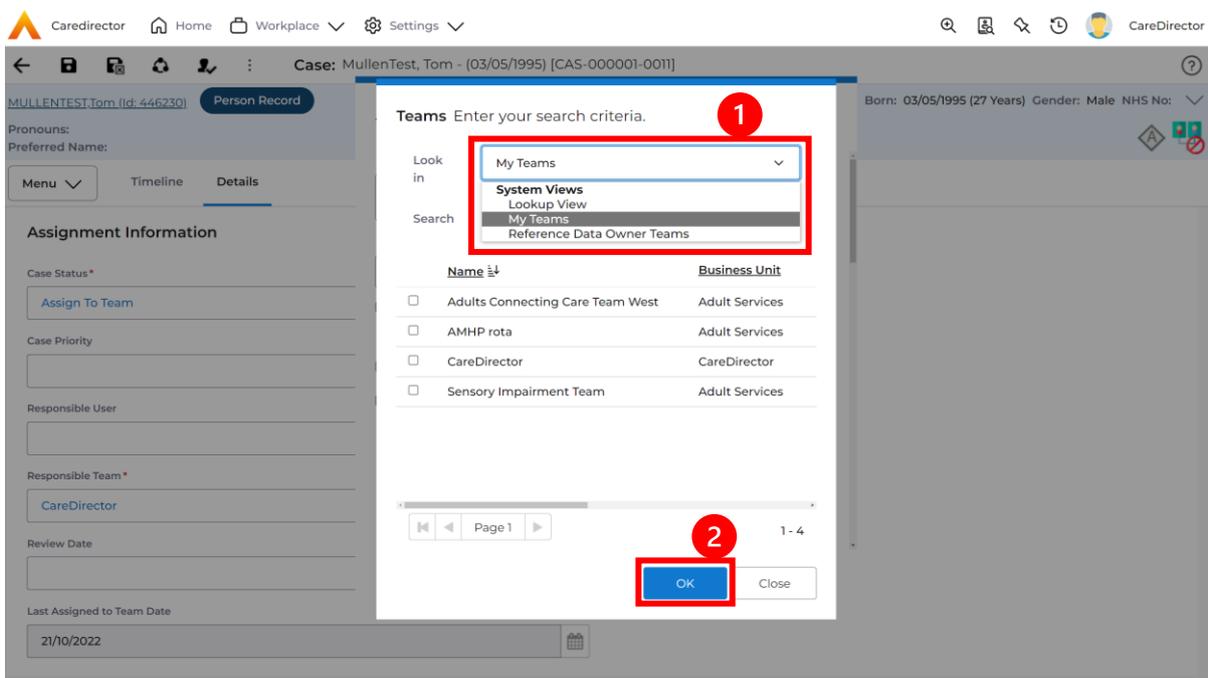
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.

The screenshot shows the 'Assignment Information' form in CareDirector. The 'Case Status' dropdown menu is open and set to 'Assign To Team', with a red box and a '1' in a red circle highlighting the dropdown arrow. The 'Responsible User' field is empty and is highlighted with a red box and a '2' in a red circle. Other fields include 'Case Priority', 'Responsible Team' (set to 'CareDirector'), and 'Review Date'.

- 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 CareDirector. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown is set to 'Do not change'. The 'Responsible User' field in the background is empty and highlighted with a red box. The modal includes options for 'Include Inactive?', 'Related Records to Include' (with checkboxes for 'Check/Uncheck All', 'Adult Safeguarding', 'Adult Safeguarding Primary Reason History', 'Adult Safeguarding Secondary Reason', 'Adult Safeguarding Status History', and 'Note'), and 'OK' and 'Close' buttons.

- 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 it contains the text '* Secondary Worker'. The 'Involvement Member' field is also highlighted with a red box and a red circle containing the number '2', and it contains the name 'Peter King'. Other fields include 'Case' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Responsible Team' (CareDirectorTest), 'Person' (TEST Tom), 'Involvement Priority', 'Involvement Status', 'End Date', 'Start Date' (04/10/2022), 'Involvement End Reason', 'Involvement Reason', and 'Involvement Review Date'. The 'Description' field is at the bottom.

How to clone a Case

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

The screenshot shows the CareDirector interface for a case. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]'. Below the title, there are tabs for 'Person Record', 'Timeline', and 'Details'. The 'Details' tab is selected and highlighted with a red box. The main content area is titled 'Contact Details' and contains several form fields: Case No* (CAS-000001-0010), Contact Received By* (Scott Simpson), Person* (TEST Tom), Contact Reason* (A - Adult Safeguarding), Case Date/Time* (21/06/2022 07:00), Presenting Priority, Initial Contact, Additional Information, Date/Time Contact Received*, and Referral Reason.

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

The screenshot shows the CareDirector interface for a case, similar to the previous one. The 'Details' tab is selected. A toolbar is visible above the 'Contact Details' section, and the 'Three Dots' menu is open. The menu items are: Correct Errors, Pin to me, Unpin from me, Pin to another, Sync with PDS, Clone, Restrict Access, Delete, Run Workflow, and Copy Record Link. The 'Clone' option is highlighted with a red box and a red circle with the number '2'. The 'Three Dots' menu icon is also highlighted with a red circle and the number '1'.

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

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
<input type="checkbox"/> Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
<input type="checkbox"/> Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
<input type="checkbox"/> Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
<input type="checkbox"/> Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

Search [2]

- 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.

Person: Test Tom

Person Record

Born: 03/05/1996 (26 Years) Gender: Male NHS No: [redacted]

Timeline Summary Profile Cases Services Document View **All Activities**

All Activities

Keyword: []

Activity Type: All

Date Type: Created Date

From: [] **1**

To: 01/11/2022

Actual End (From): []

Clear Filters **Search** **2**

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.

Person: Test Tom

Person Record

Born: 03/05/1996 (26 Years) Gender: Male NHS No: [redacted]

Timeline Summary Profile Cases Services Document View **All Activities**

All Activities

Keyword: []

Activity Type: All

Date Type: Created Date

From: []

To: 01/11/2022

Actual End (From): []

Clear Filters **Search**

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

How to input an Activity

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

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM.TEST (id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown]
Preferred Name: [dropdown]

Menu ^ (1) | Timeline | Details (2)

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

Related Items

Other information

Responsible User: [input field]

Responsible Team*: AMHP Coordinator [input field]

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

Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]

TOM.TEST (id: 444276) Person Record Born: 24/07/1950 (72 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown]
Preferred Name: Tom

Menu v

+ (1) | [dropdown] | [dropdown] | [dropdown] | Tasks

Related Records [dropdown] | Search for records [input field]

<input type="checkbox"/>	Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CMHT Older People Tea...	

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

The screenshot shows the 'Case Note (For Case): New' form in the CareDirector system. The form includes several fields: Case, Reason, Priority, Date, Status, Responsible Team, Responsible User, Category, Sub-Category, and Outcome. The 'Responsible User' field is highlighted with a red box and a '1' in a red circle, indicating the step of selecting a worker. The 'Save' icon in the top navigation bar is also highlighted with a red box and a '2' in a red circle.

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

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

1. Select the **Form** or **Activity** that requires to be **Completed**. This will send an **Activity** to your **Team Managers** dashboard for them to approve.
2. Under **Status** use the dropdown list to select **Completed**. After select **Save**.

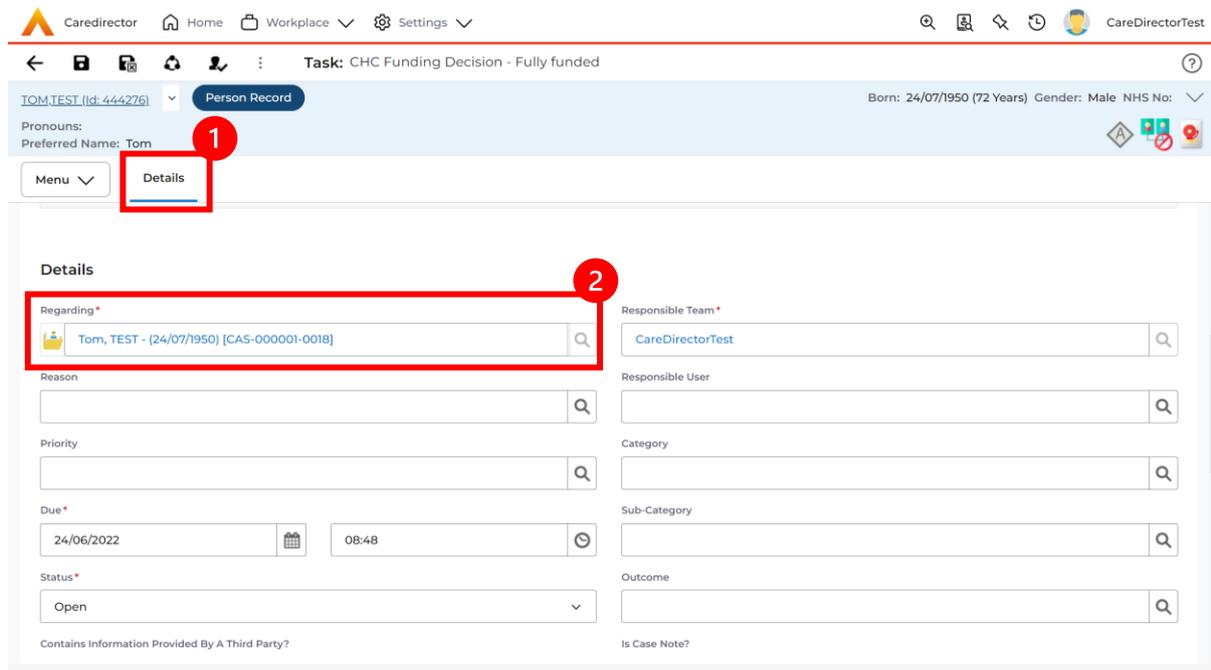
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955) [CAS-000001-000...'. The main content area shows a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

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

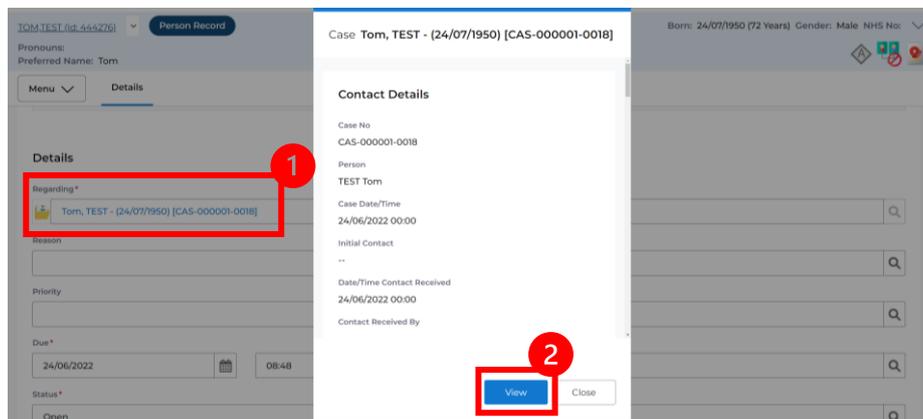
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Task: Test Task for Case'. The main content area shows a 'Task' for 'MULLENTTEST, Tom (Id: 444264)'. The 'Activate' option is highlighted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

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

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



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test**. It is linked to a **Person Record**.
4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record**) and go into the record by selecting **View**.



How to Allocate a new Activity to another team

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

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' as the selected option. Other fields include 'Regarding' (MullenTest_Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'.

2. Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.

The screenshot shows the 'Task: New' form with a 'Teams' lookup dialog box open. The dialog box has three red circles: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The list shows the following teams:

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 'Person Record' form in CareDirector. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'MULLENTEST, Tom (Id: 446230) > Person Record'. The form contains several fields: 'Regarding' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Responsible Team' (Sensory Impairment Team), 'Reason', 'Priority', 'Due' (with date and time pickers), 'Status' (Open), 'Category', 'Sub-Category', and 'Outcome'. At the bottom, there are two radio button questions: 'Contains Information Provided By A Third Party?' (No selected) and 'Is Case Note?' (No selected). The 'Responsible User' field is currently set to 'Scott Simpson' and has a red box around the 'X' icon and a '1' in a red circle. The 'X' icon in the 'Regarding' field has a red box around it and a '2' in a red circle.

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**.

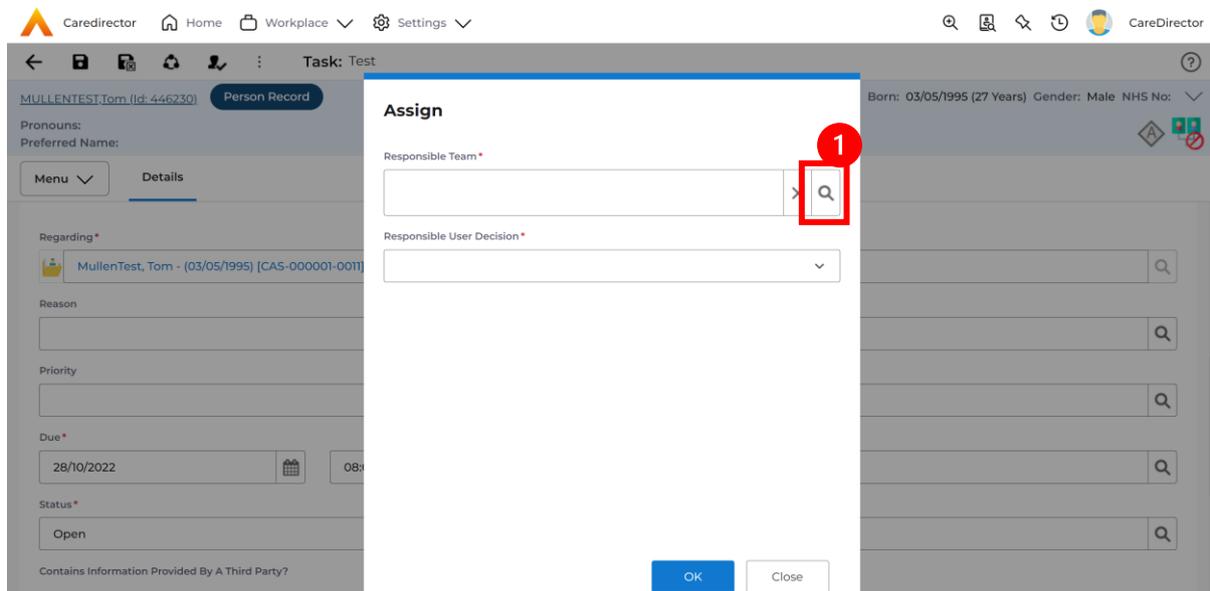
The screenshot shows the CareDirector interface for a task record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The record details include:

- Person Record: MULLENTEST, Tom (id: 446230)
- Born: 03/05/1995 (27 Years) Gender: Male NHS No: [redacted]
- Details section:
 - Regarding*: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
 - Responsible Team*: Sensory Impairment Team
 - Responsible User: Scott Simpson (highlighted with a red box and a '1' in a red circle)
 - Reason: [empty]
 - Priority: [empty]
 - Due*: 28/10/2022, 08:00
 - Status*: Open
 - Category: [empty]
 - Sub-Category: [empty]
 - Outcome: [empty]

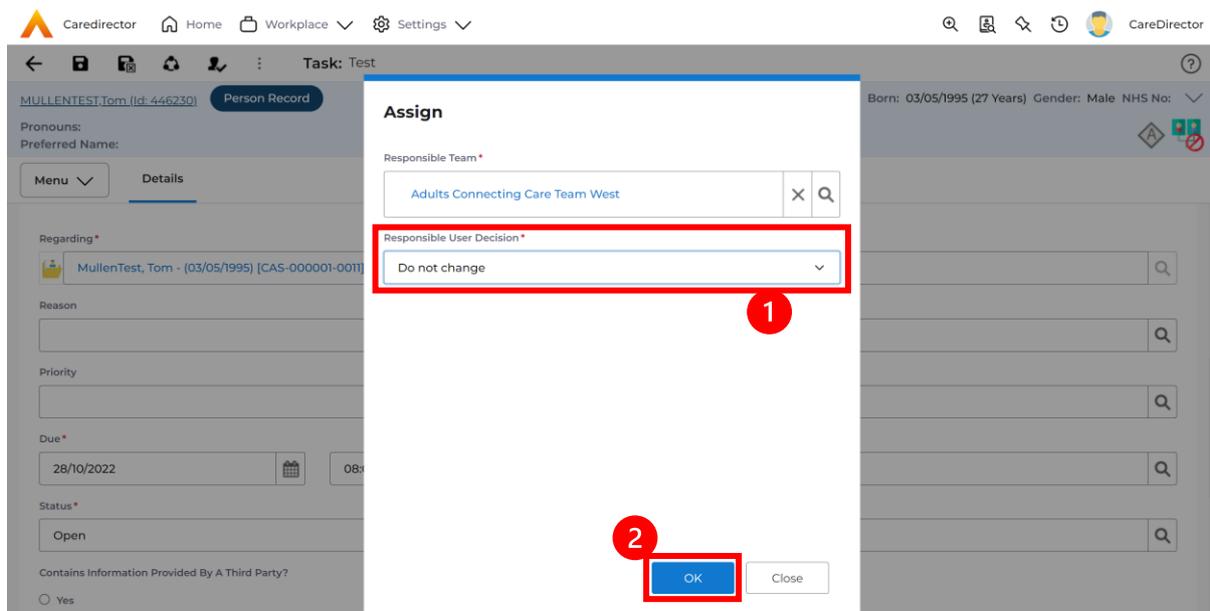
2. Next select **Assign this record to another team** from the toolbar.

This screenshot shows the same CareDirector interface as above, but with the 'Assign' icon in the top toolbar highlighted with a red box and a '1' in a red circle. The task details remain the same, but the 'Responsible User' field is now empty, indicating the record has been assigned to a team.

- 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.



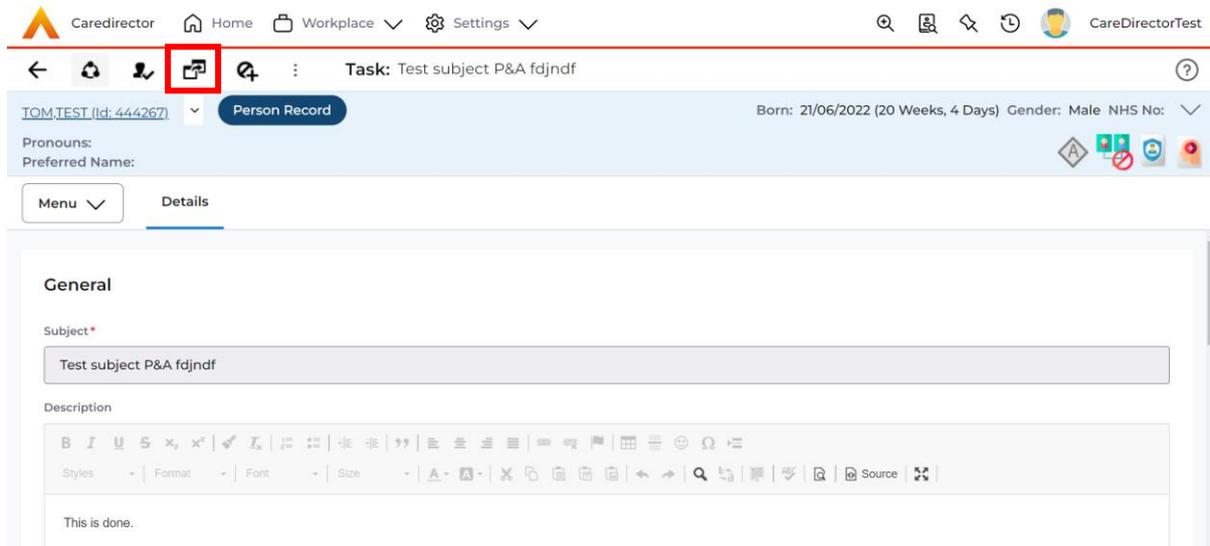
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



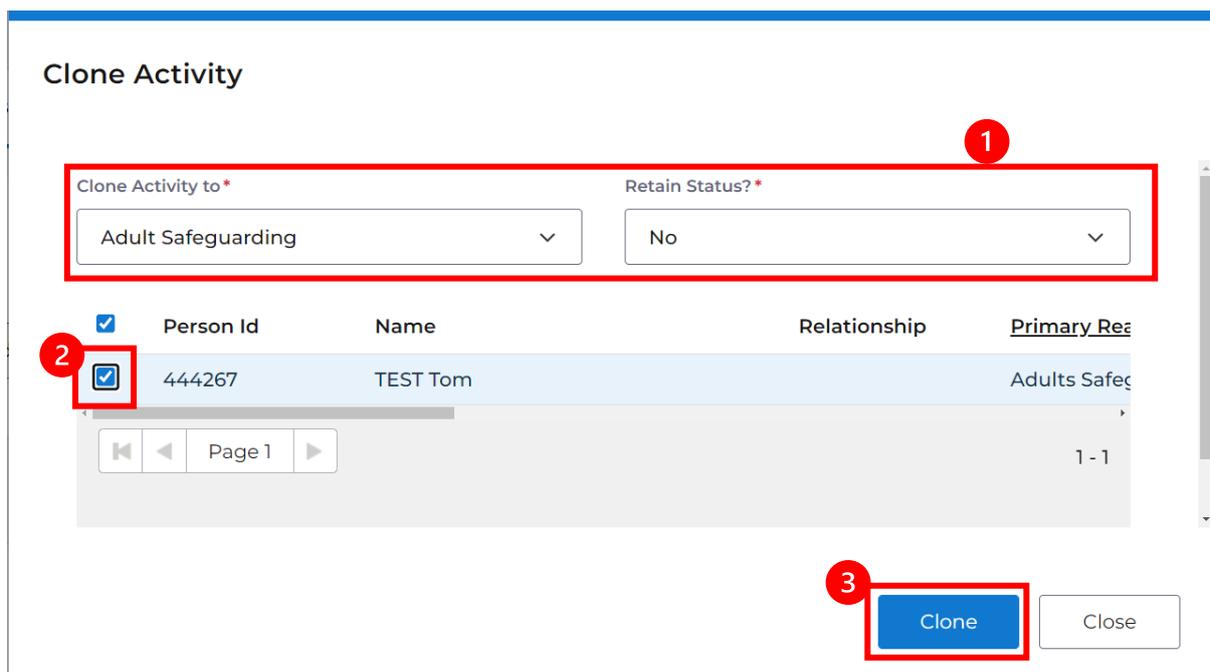
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

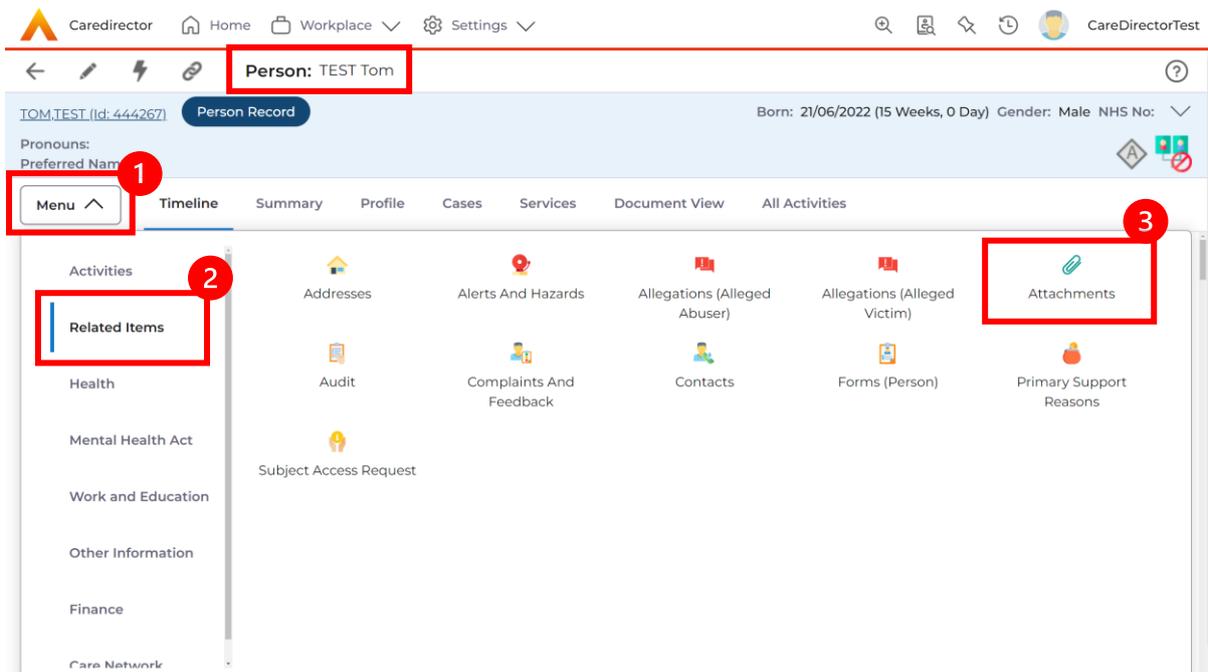


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

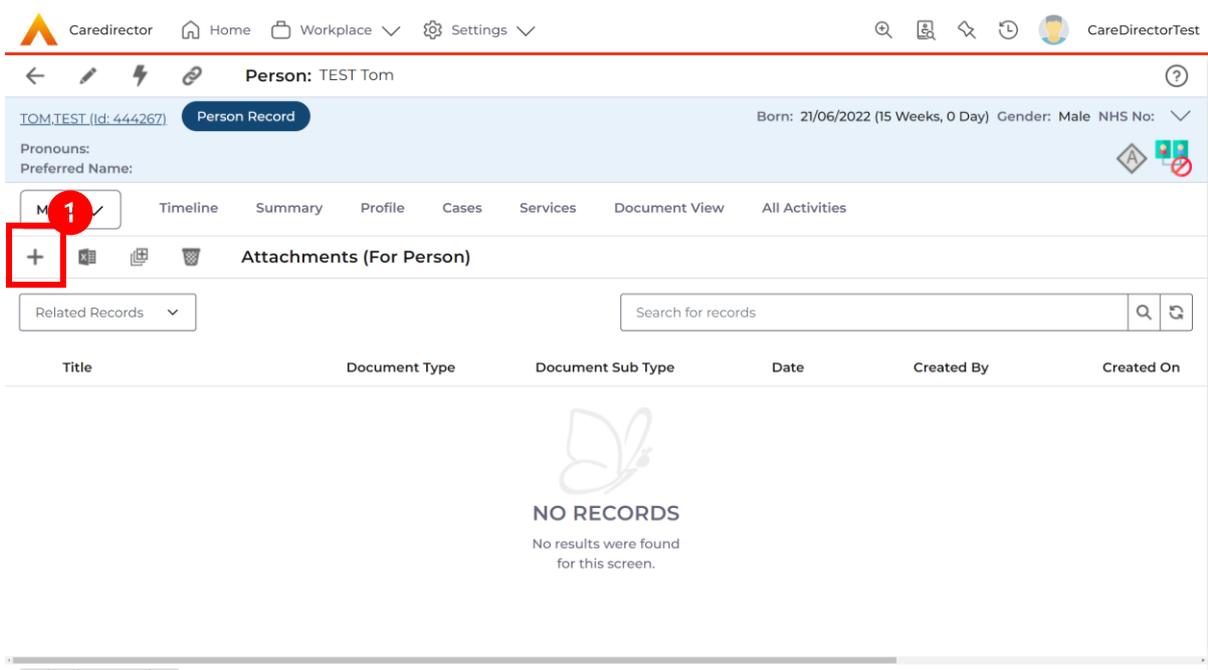


How to upload Attachments

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**.



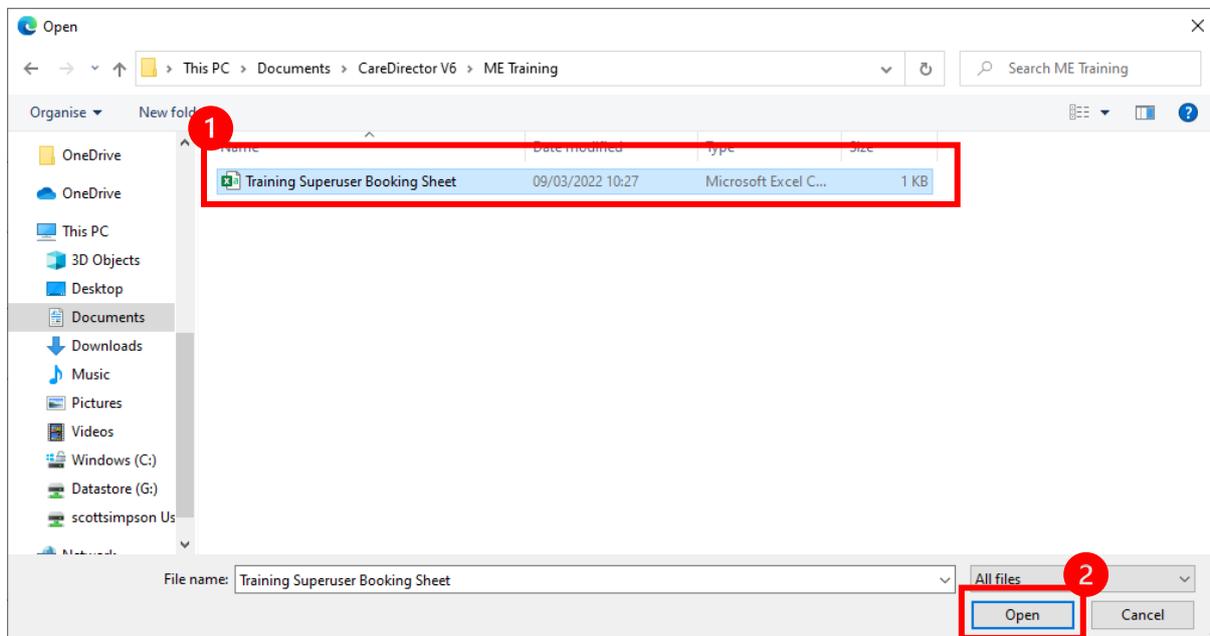
2. When opened, select the **Create New Record** from the toolbar.



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. The 'Browse' button is also highlighted with a red box. Other fields include 'Person' (TEST Tom), 'Responsible Team' (CareDirectorTest), 'Title' (Test Document Upload), 'Date' (04/10/2022), 'Document Type' (Clients), and 'Declared' (No).

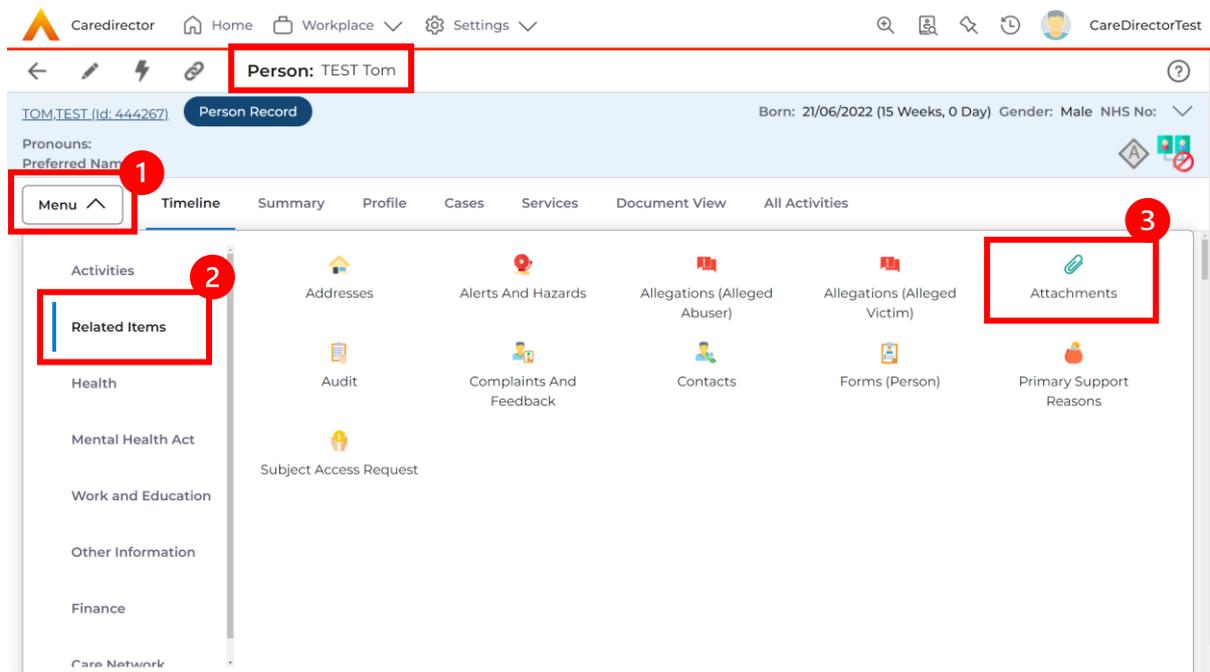
4. Select a **File** from your computer/ SharePoint and select **Open**.



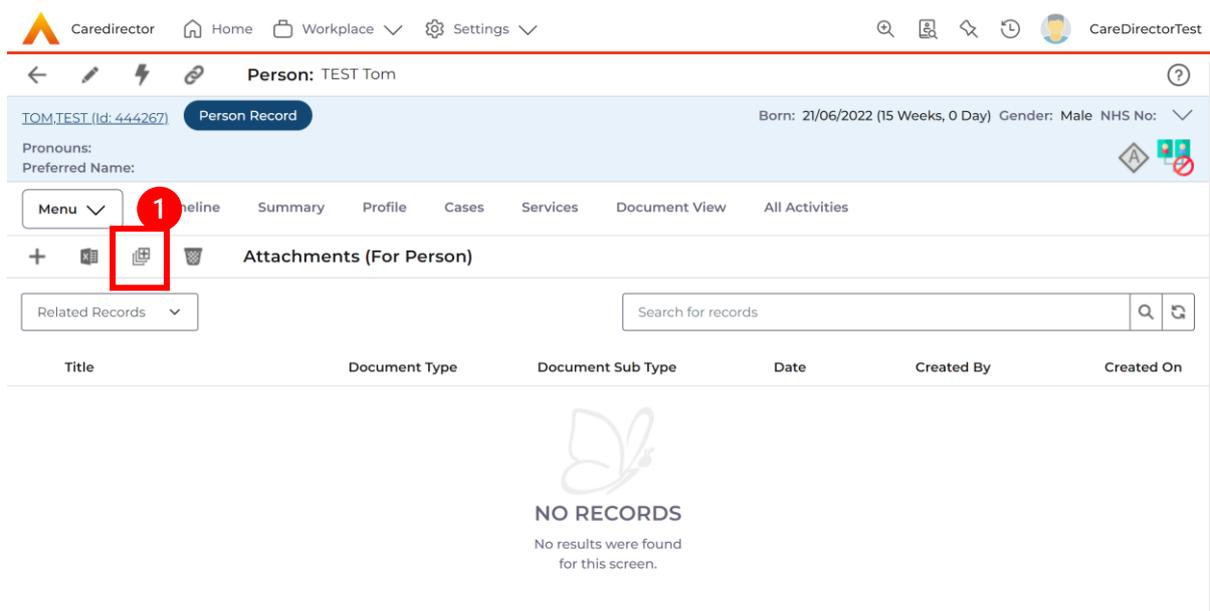
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

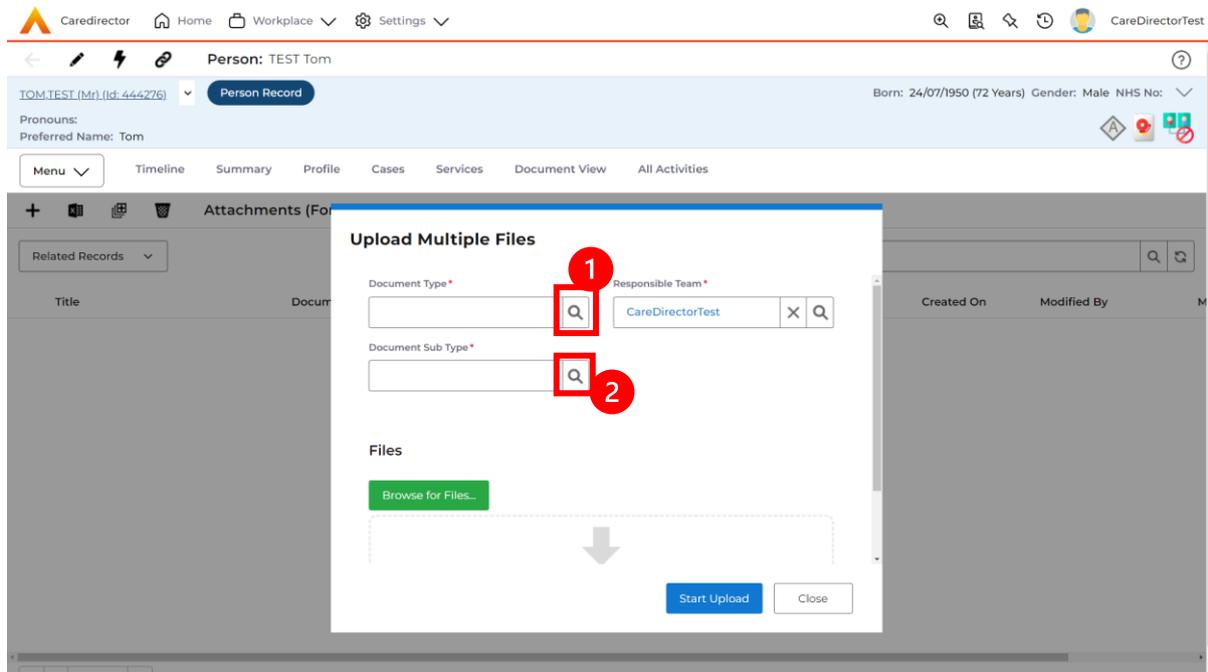
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



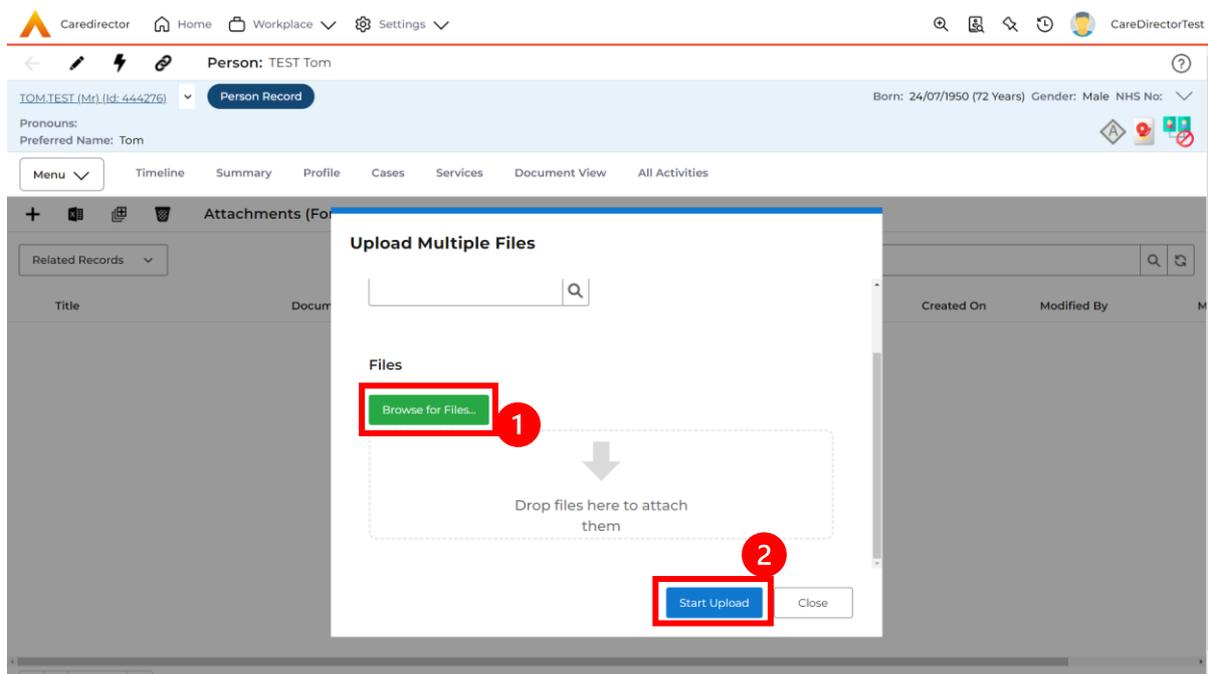
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. The main content area shows a timeline of events:

- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'. Involvement Member: Community Occupational Therapy Service, Role: Occupational Therapist, Start Date: 21/09/2022.
- Case Involvement Created** (21/09/2022 12:17:20): A new record of case involvement was created by Scott Simpson.

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

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' section is active, showing a list 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

TOM TEST (Id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name: [dropdown]

Menu Timeline Summary Profile **Cases** Services Document View All Activities

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

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created
<input type="checkbox"/>	CareDirector Support	21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scott Simpson
<input type="checkbox"/>	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]

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

Pronouns: Preferred Name: [dropdown]

Menu ^ Timeline Details

Activities Actions Adult Safeguarding Attachments Audit Deprivations Of Liberty **Forms (Case)** Involvements

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: 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 Role: Occupational Therapist Start Date: 21/09/2022 Service

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)**.

The screenshot shows the CareDirector interface for a case titled 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is viewing the 'Person Record' for TOM.TEST (id: 444267). The toolbar at the top contains several icons, with the 'Create New Record' icon (a plus sign) highlighted by a red box and a red circle containing the number 1. The title of the new record is 'Forms (Case)'. Below the toolbar, there is a table of related records with the following data:

Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest	

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**.

The screenshot shows the 'Details' section for a new record titled 'Form (Case): New'. The user is viewing the 'Person Record' for TOM.TEST (id: 444276). The 'Details' tab is highlighted with a red box. The 'Form Type' field is highlighted with a red box and a red circle containing the number 1, indicating the lookup function. The form contains the following fields:

- Case**: Tom, TEST - (24/07/1950) [CAS-000001-0018]
- Responsible Team**: CareDirectorTest
- Form Type**: (Lookup icon highlighted)
- Responsible User**: (Lookup icon)
- Status**: In Progress
- Due Date**: (Calendar icon)
- Start Date**: 21/10/2022
- Review Date**: (Calendar icon)
- Preceding Form**: (Lookup icon)

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.

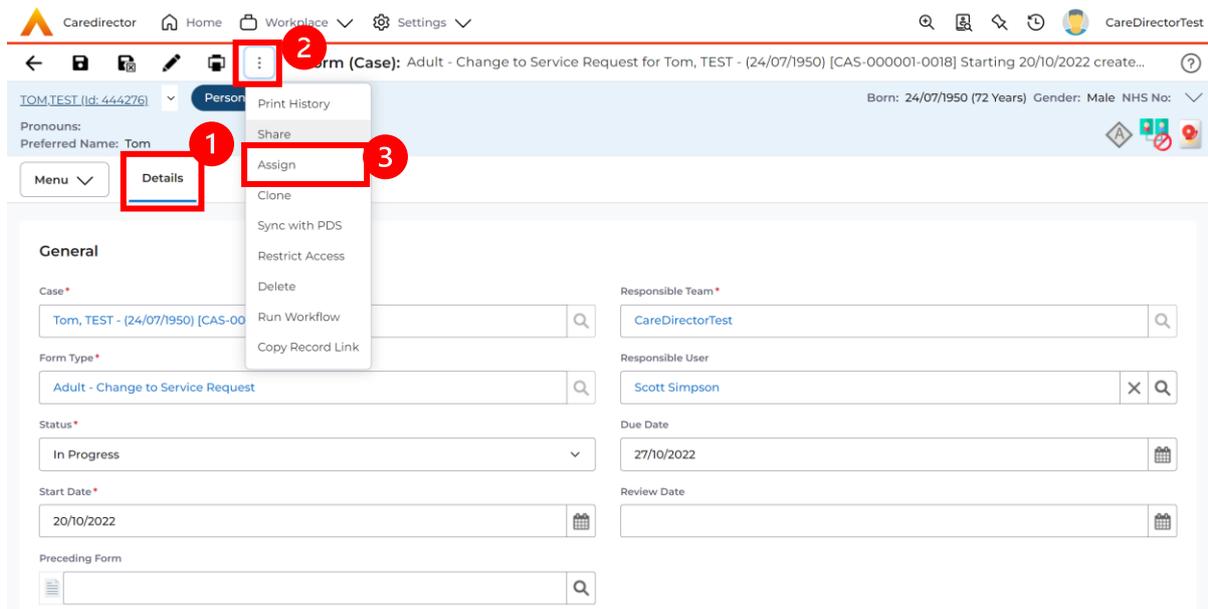
The screenshot shows the CareDirector interface for a case. The top navigation bar includes 'Caredirector', 'Workplace', and 'Settings'. The main header displays the case title: 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]'. A red circle with the number '1' highlights the 'Edit' button in the toolbar. Below the header, there is a 'Person Record' section for 'TOM,TEST (Id: 444267)' with details like 'Born: 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]), 'Responsible Team' (CareDirectorTest), 'Form Type' (AMHP Report Form), 'Responsible User' (Scott Simpson), 'Status' (In Progress), 'Start Date' (21/09/2022), 'Due Date', 'Review Date', and 'Preceding Form'.

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

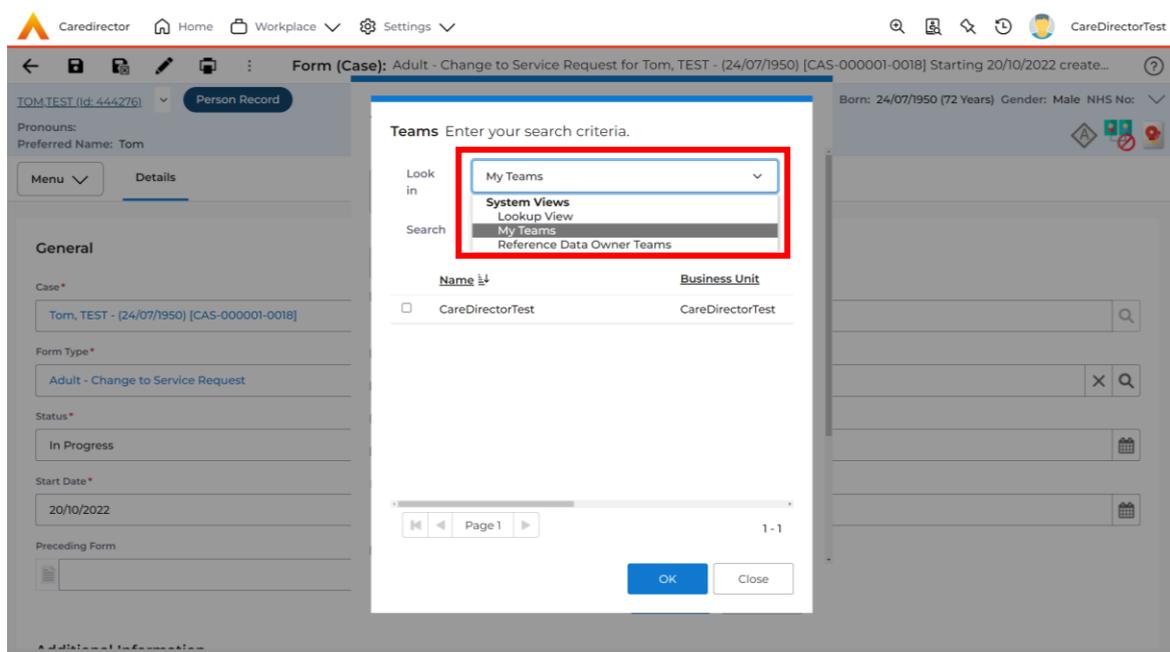
The screenshot shows the CareDirector interface for the 'AMHP Report Form'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the case title: 'AMHP Report Form'. A red circle with the number '1' highlights the 'Save and Return to Previous Page' button in the toolbar. Below the header, there is a 'Person Record' section for 'TOM,TEST (Id: 444267)' with details like 'Born: 21/06/2022 (15 Weeks, 0 Day)' and 'Gender: Male'. The main form area contains a sidebar with navigation options: 'Service User Details', 'Referral Details', 'Further Details', 'Background Information', and 'AMHP'S Assessment of th...'. The main content area has two sections: 'Client previously known to services?' with radio buttons for 'Yes' and 'No', and 'Ethnic Origin' with a list of options: 'White - British / Northern Irish', 'White - Irish', 'White - Gypsy or Irish Traveller', 'White - Eastern European', 'Mixed - White and Black African', 'Mixed - White and Black Caribbean', 'Mixed - White and Asian', and 'Mixed - Other / Multiple'.

How to Allocate a Form

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



2. This will open a separate window for you to allocate this **Form** to another **Team**. Remember to select **Look in** and change to **Lookup View** to find teams.



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

The screenshot shows the 'Assign' dialog box in the CareDirector system. The dialog is titled 'Assign' and contains the following fields and options:

- Responsible Team ***: Accommodation Team
- Responsible User Decision ***: Clear on current record only
- Include Inactive?**:
- Related Records to Include**:
 - Check/Uncheck All
 - Appointment
 - Assessment Factor
 - Attachment (Case Form)
 - Email
 - Email Attachment

The 'OK' button is highlighted with a red box, indicating the final step in the process.

How to Clone a Form

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

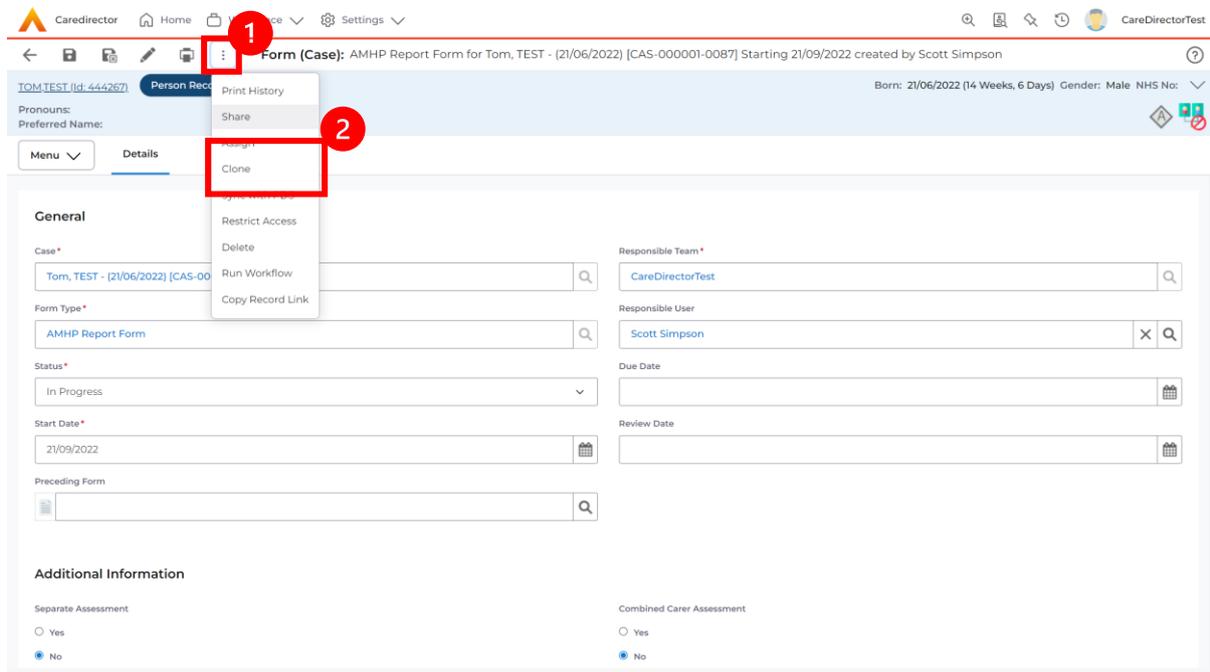
The screenshot shows the CareDirector interface for a case record. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' dropdown is open, showing 'Related Items' and 'Forms (Case)'. The 'Forms (Case)' option is highlighted, indicating the next step in the process.

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

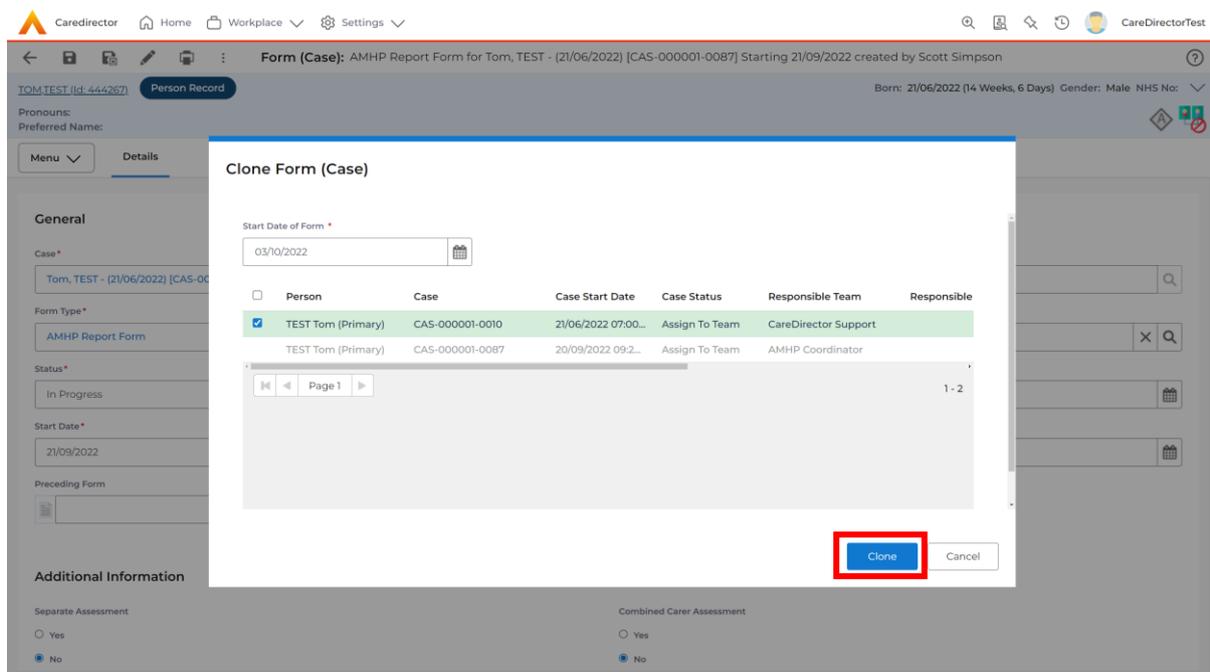
The screenshot shows the 'Forms (Case)' table in the CareDirector interface. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. A single record is visible for 'AMHP Report Form'.

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			

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 with the following details:

- Navigation:** Caredirector | Home | Workplace | Settings
- User:** CD V6 Team
- Form Title:** Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...
- Case:** TOM TEST (id: 444267) | Person Record
- Personal Info:** Born: 21/06/2022 (20 Weeks, 3 Days) | Gender: Male | NHS No: [redacted]
- Form Details:**
 - Case*: Tom, TEST - (21/06/2022) [CAS-000001-0087]
 - Form Type*: Adult Care and Support Plan
 - Status*: Closed
 - Start Date*: 09/11/2022
 - Preceding Form: [empty]
 - Responsible Team*: CareDirectorTest
 - Responsible User: Scott Simpson
 - Due Date: 11/11/2022
 - Review Date: [empty]
- Completion Details:**
 - Completed By*: Scott Simpson
 - Completion Date*: 09/11/2022
 - Signed Off By*: Scott Simpson
 - Signed Off Date*: 09/11/2022

How to reactivate a Closed Form

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the user 'CareDirectorTest'. Below this, a red box highlights the title bar of the form window, which reads: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The form itself is titled 'Person Record' and shows details for 'TOM,TEST (Id: 444267)'. The 'General' section includes fields for Case, Form Type, Status, Start Date, Responsible Team, Responsible User, Due Date, and Review Date. The 'Status' field is currently set to 'Closed'.

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

This screenshot shows the same form as the previous one, but with the three dots menu icon highlighted by a red box and labeled with a '1'. The dropdown menu is open, showing options: 'Share', 'Assign', 'Clone', 'Restrict Access', 'Activate', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Activate' option is highlighted by a red box and labeled with a '2'. The rest of the form details remain the same.

Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.
2. Select the relevant **Person Record** and select **Services**.

The screenshot shows the CareDirector interface for a person record. The 'Services' tab is highlighted with a red box and a red circle containing the number 1. The timeline shows three events for SEP 2022:

- Task Created** (21/09/2022 13:42:01): A new record of task was created by Scott Simpson. Responsible Team: CareDirectorTest, Responsible User: Scott Simpson, Subject: Referral has been Allocated.
- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Due Date: [blank], Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.

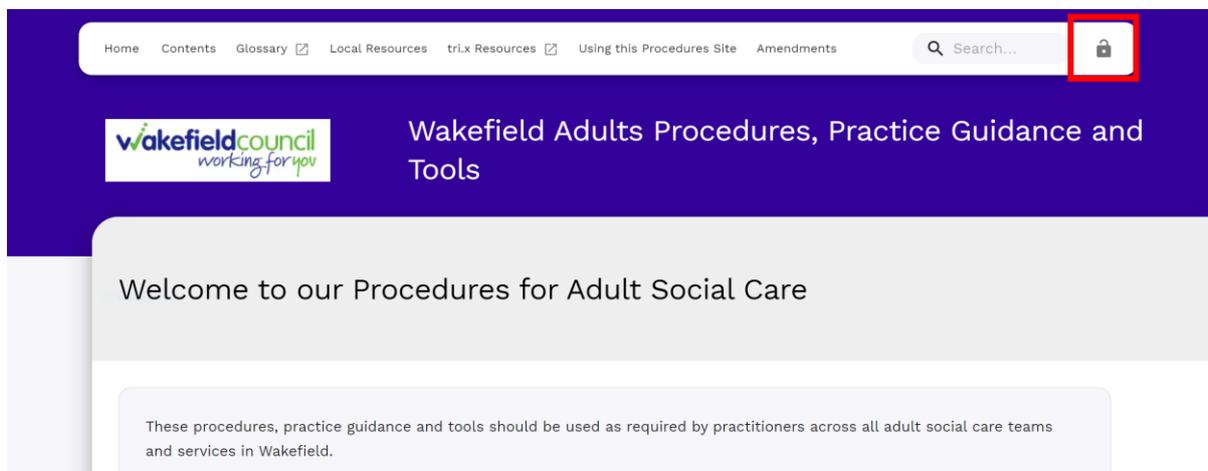
The screenshot shows the CareDirector interface for a person record. The 'Services' tab is highlighted with a red box and a red circle containing the number 1. The 'Create New Record' button (a plus sign) is highlighted with a red box and a red circle containing the number 2. Below the toolbar is a search bar and a table of service provisions:

Id	Person	Id [Person]	Status	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Eleme
220022	TEST Tom	444267	Draft	08/08/2022				Adult Residen

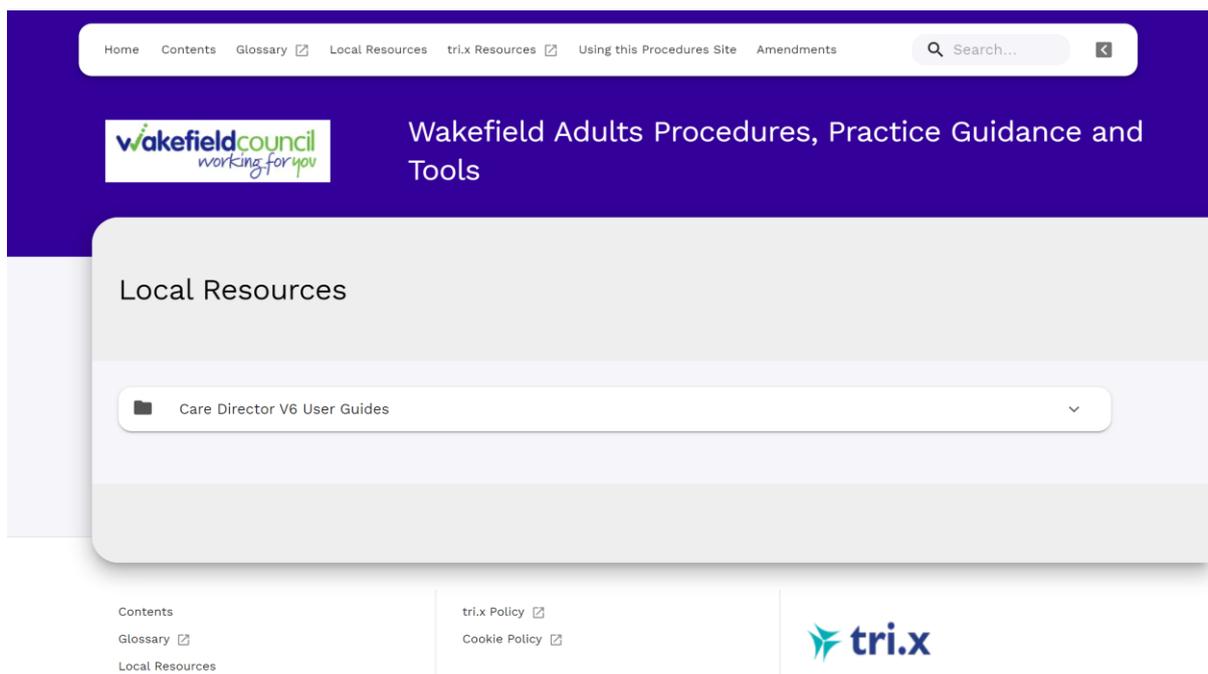
4. Then follow the appropriate section to complete the **Service Provision**.

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	14/10/2022