Co-ordination Team
V1.0

Document	CareDirector Co-ordination Team.
Purpose	Co-ordination teams daily tasks on CareDirector.
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Owner	ICT Business Transformation Team
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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**

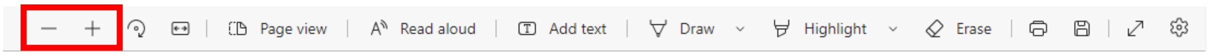
2. Must be completed.

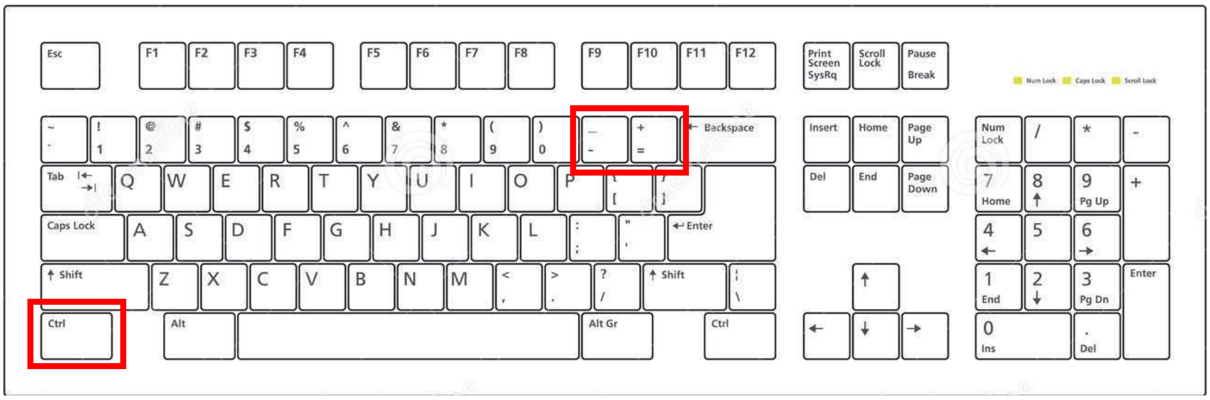
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

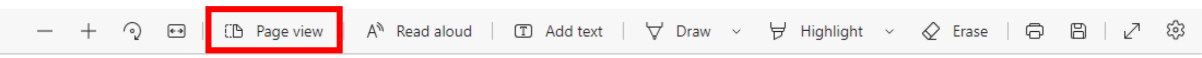
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.

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.

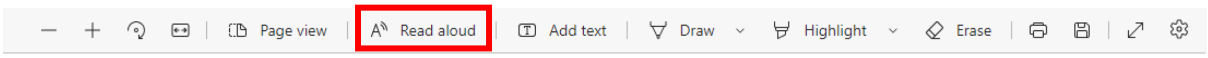




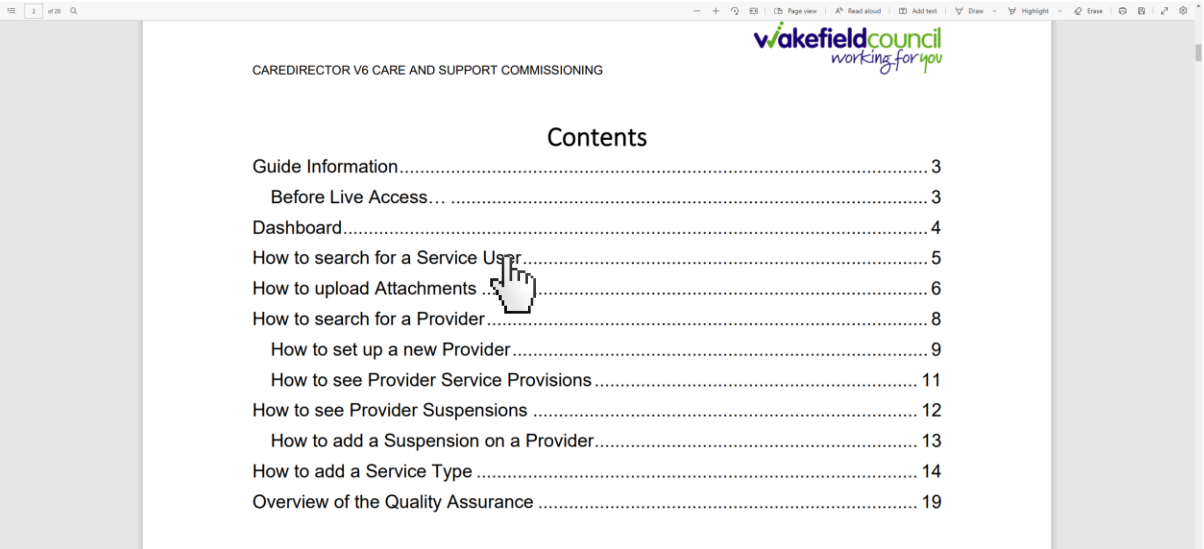
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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.


CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

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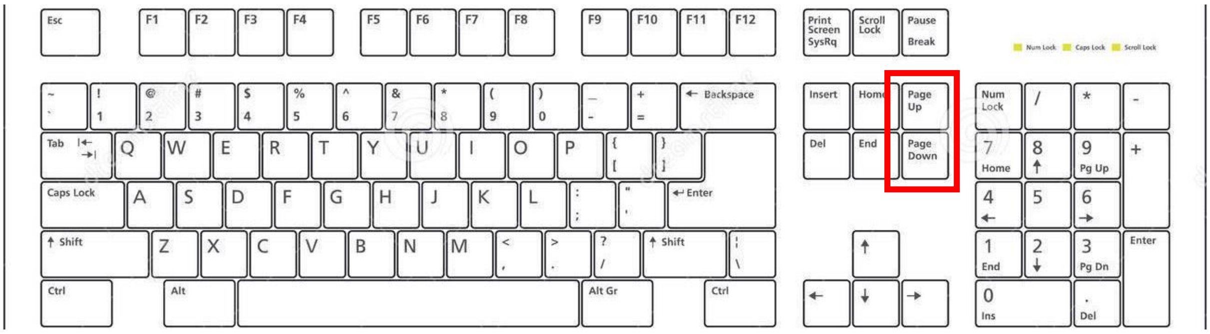
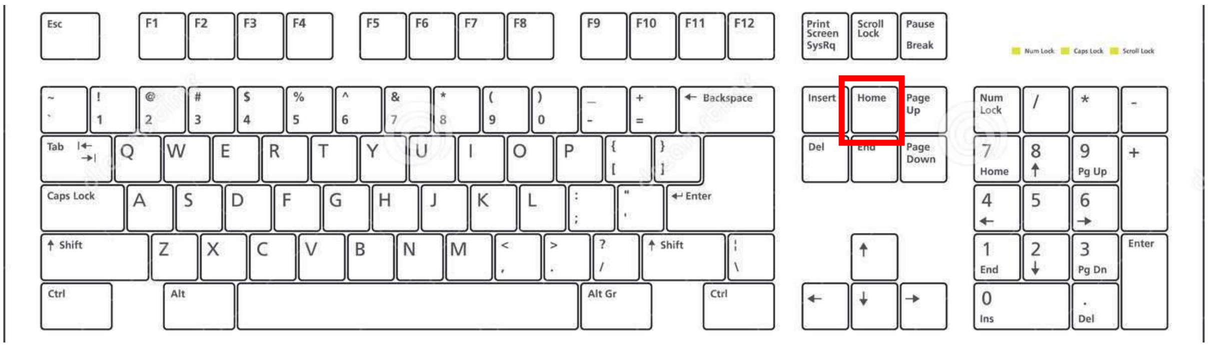
6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to "jump" up and down a page.

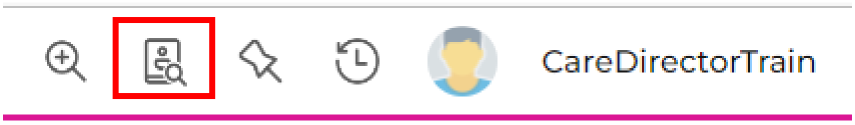


7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.

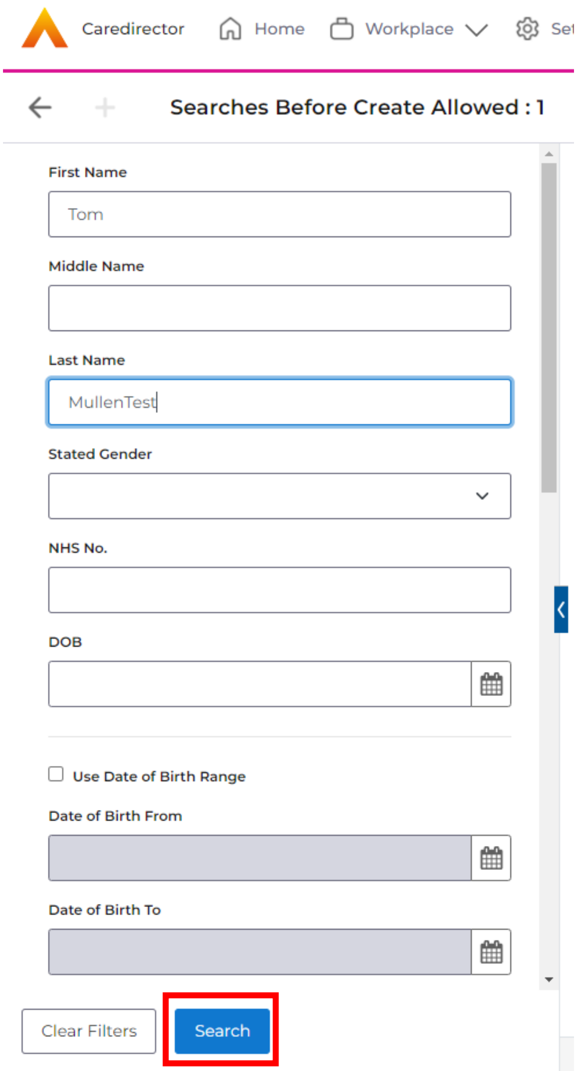


How to search for a Service User

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



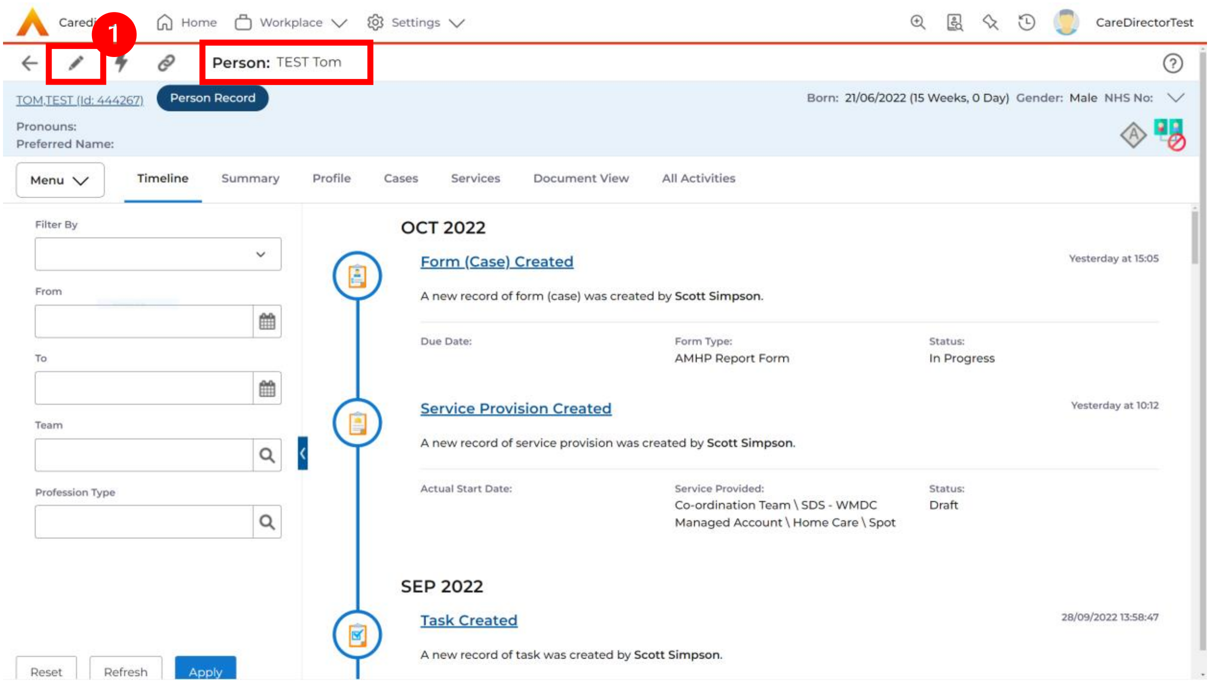
2. Enter their details provided. When finished, select **Search**.



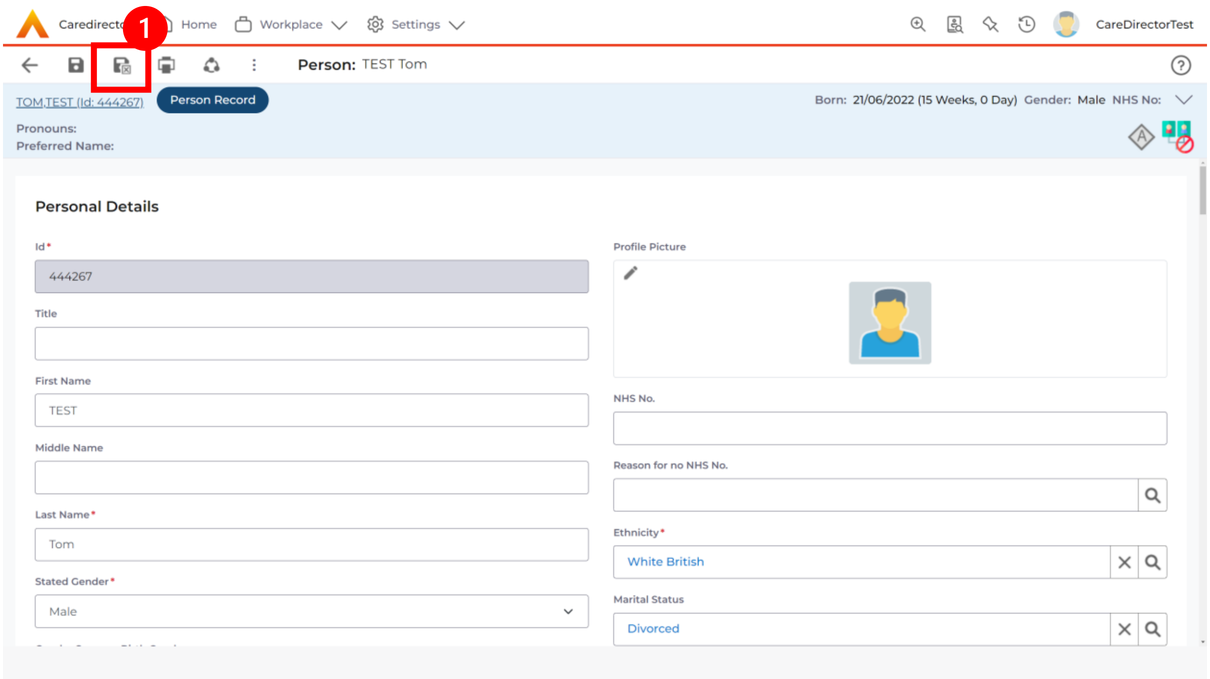
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

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

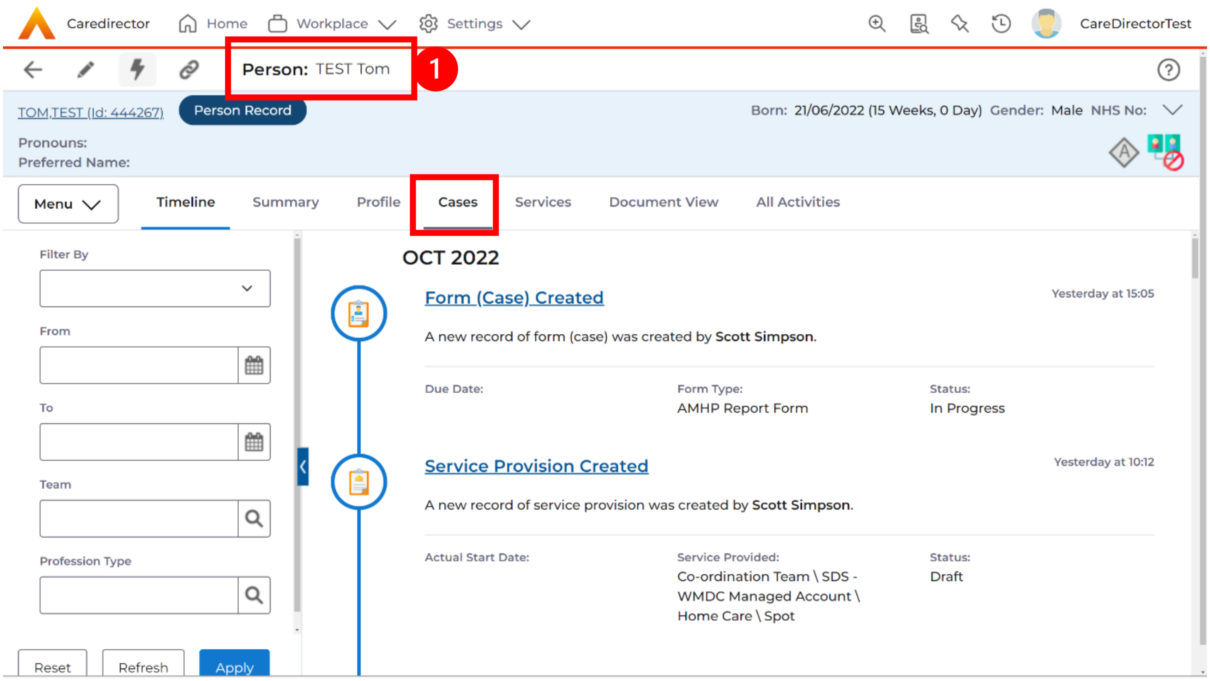


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

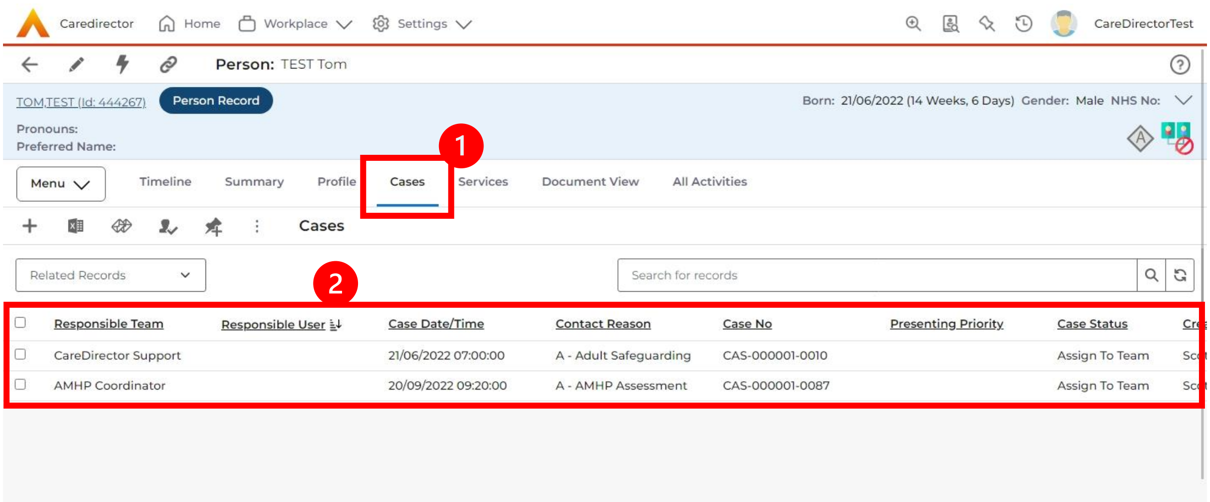


How to search for a Case

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

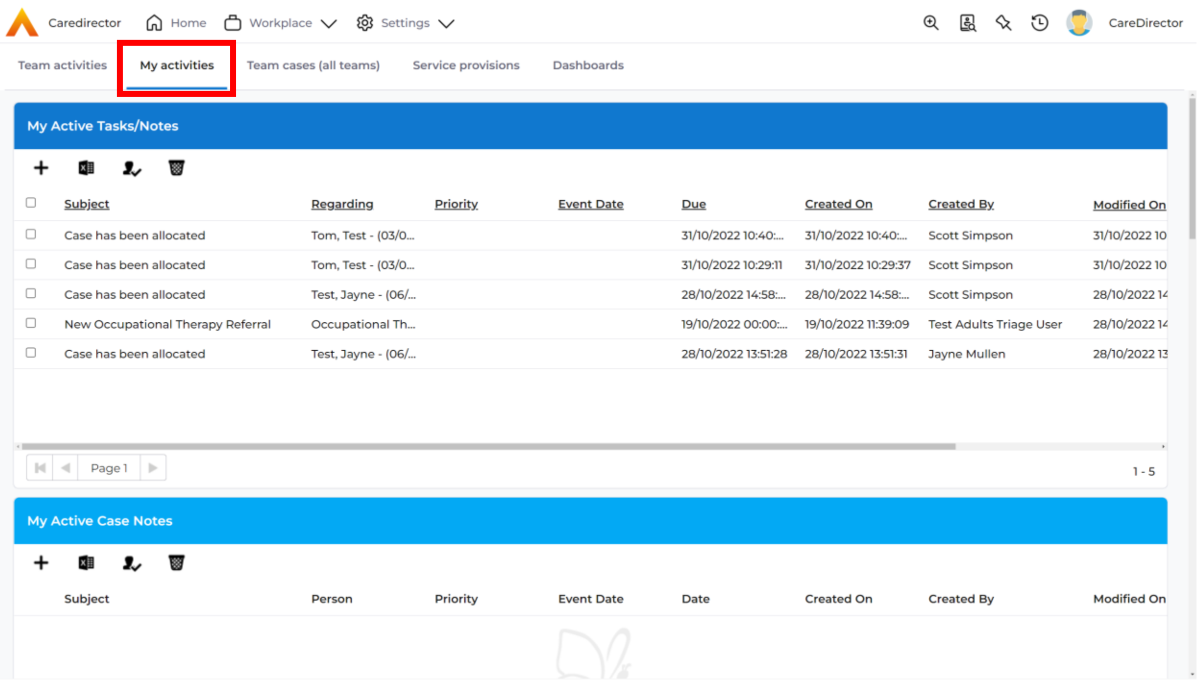


2. When found, select it to open the **Case Record**.

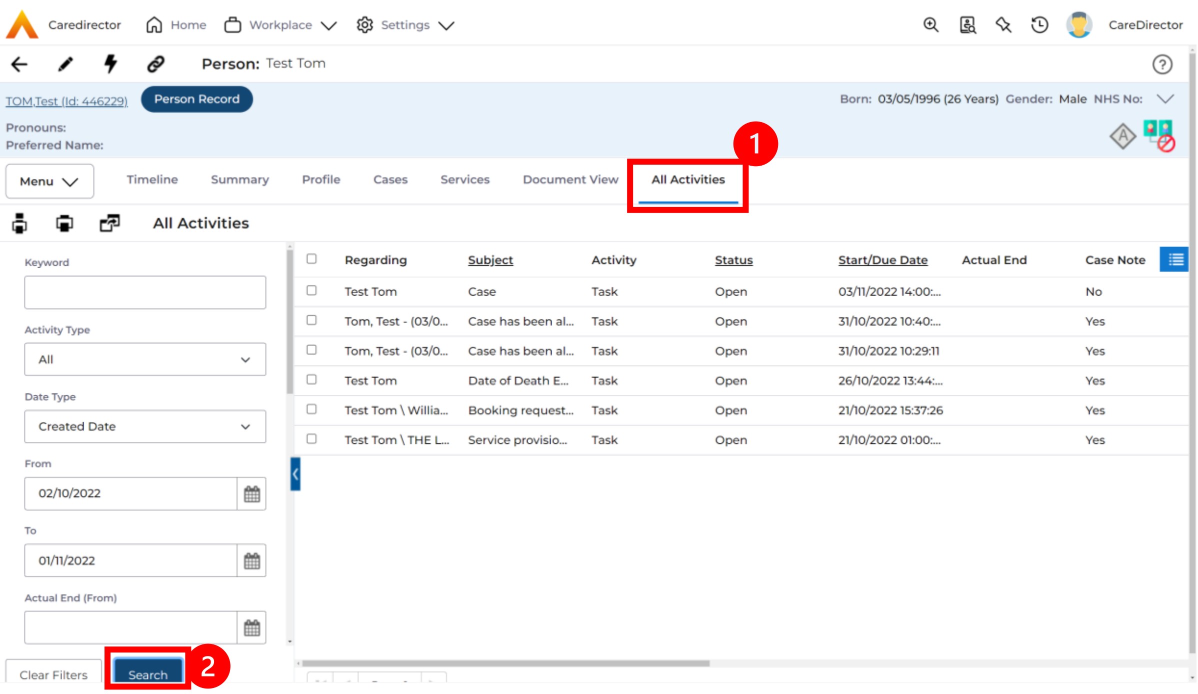


How to find Activities

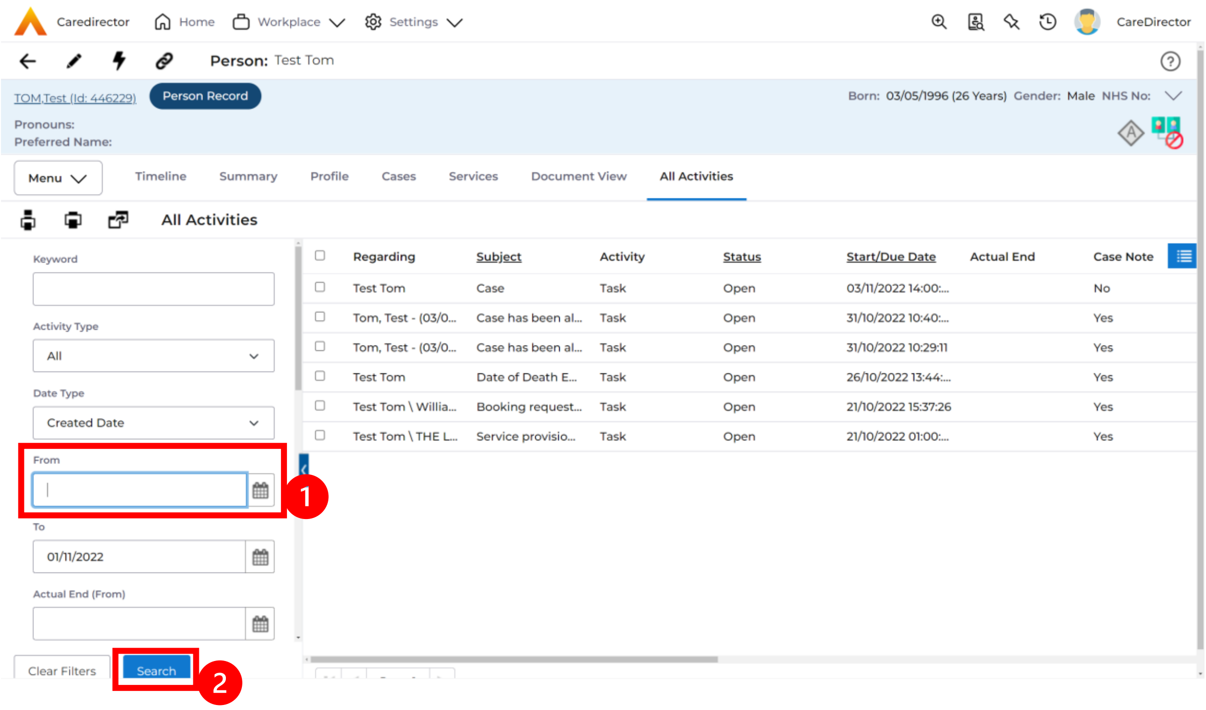
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



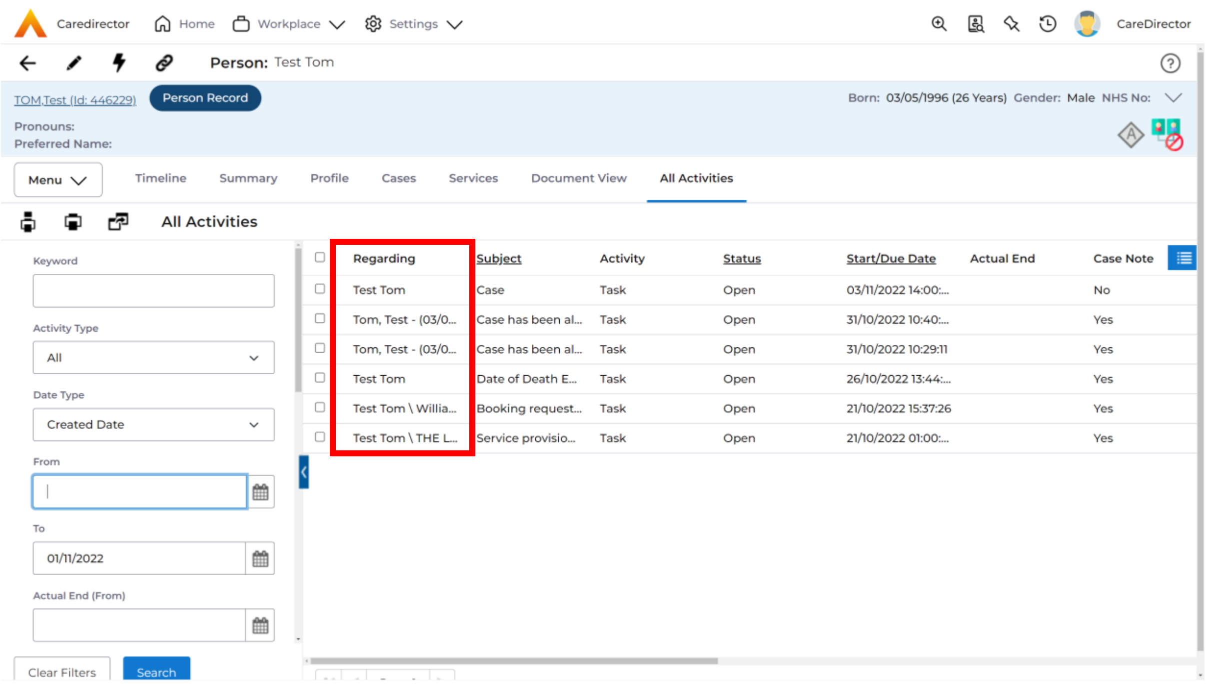
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



3. This can be filtered further using the options on the left. By default, the search will bring through all **Activities** that are linked to that **Service User** for the past month. Delete the **From Date** to bring through all.

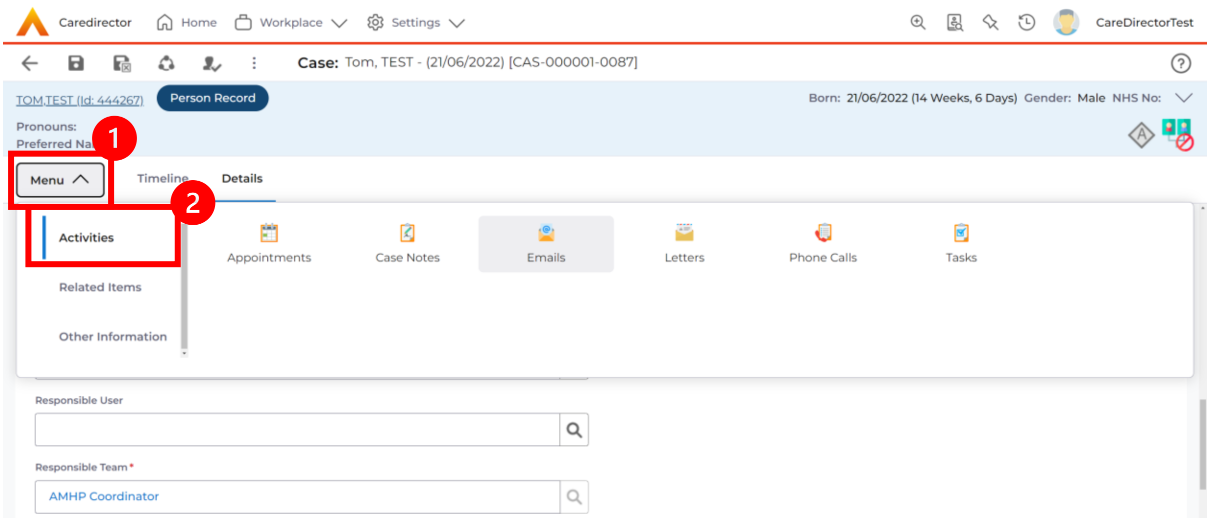


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

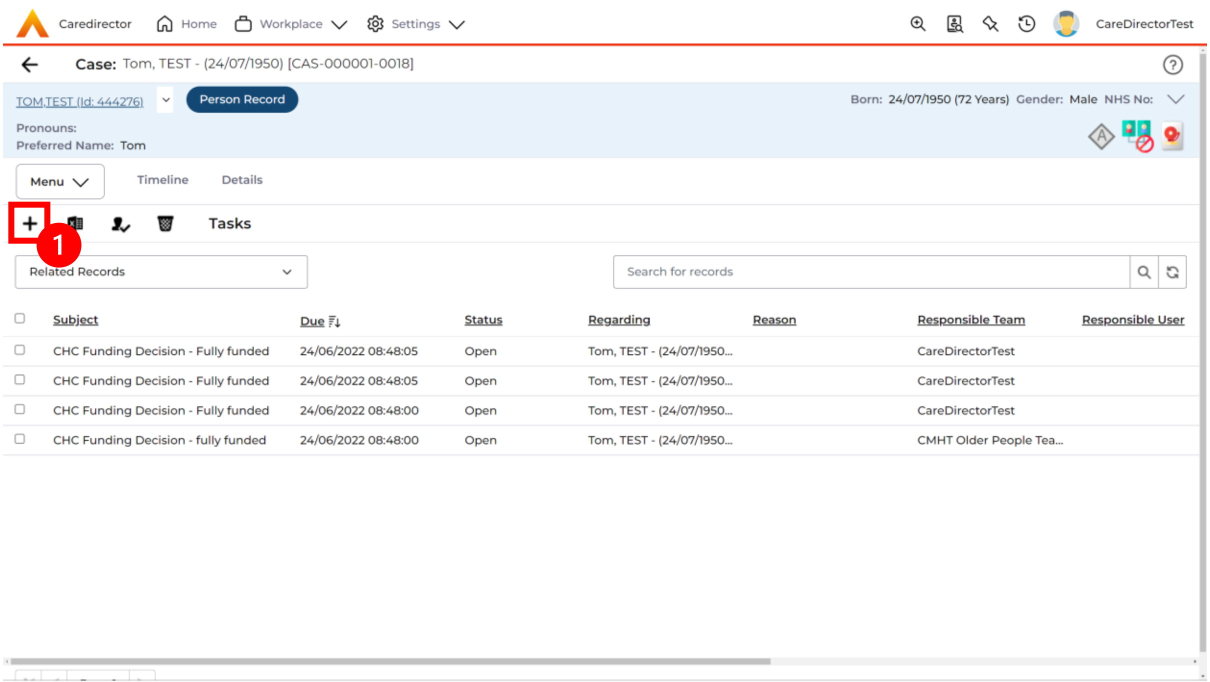


How to input an Activity

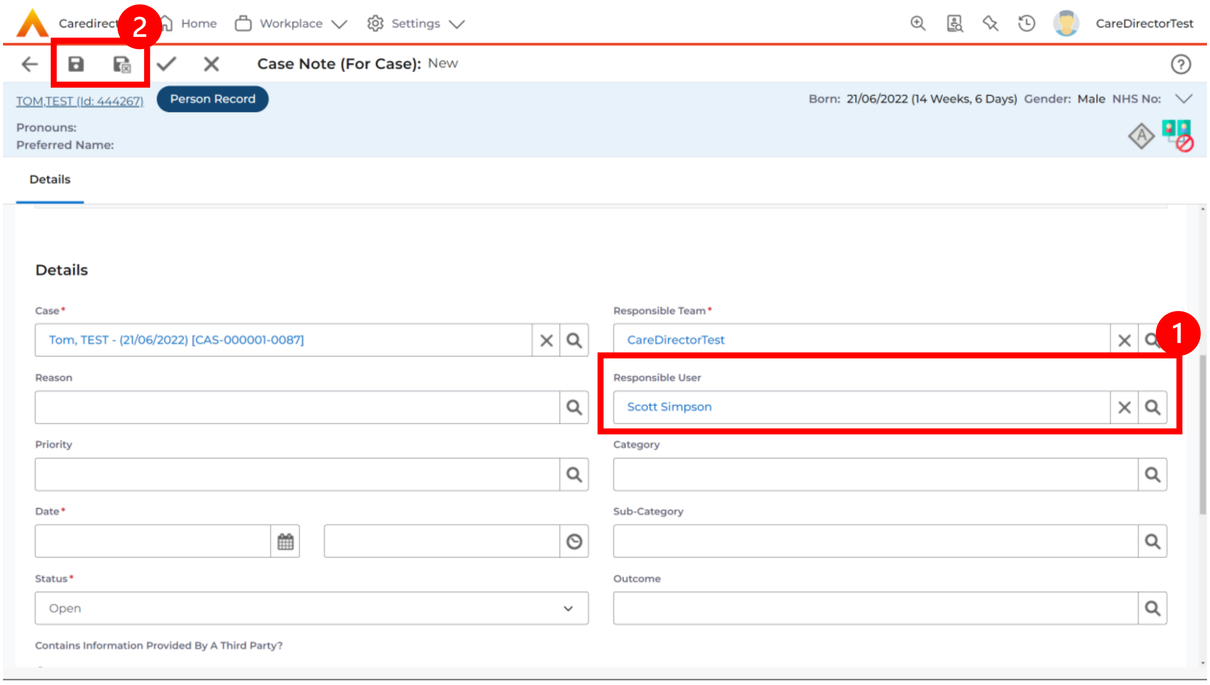
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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



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

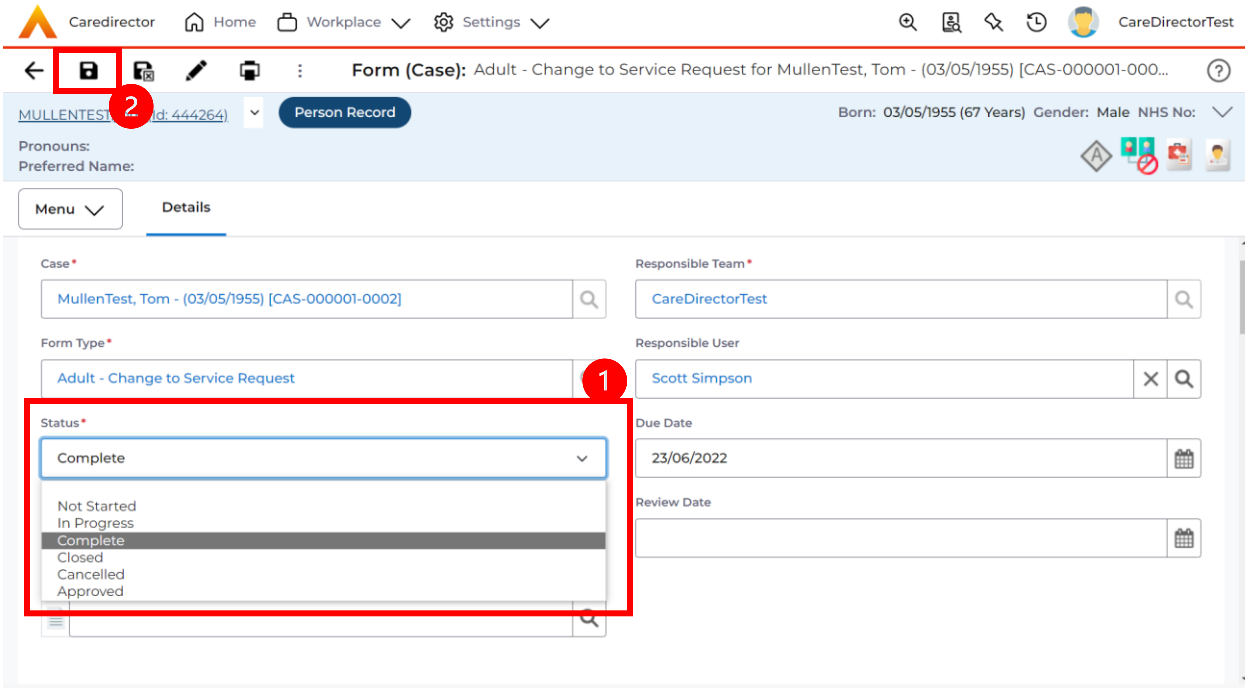


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

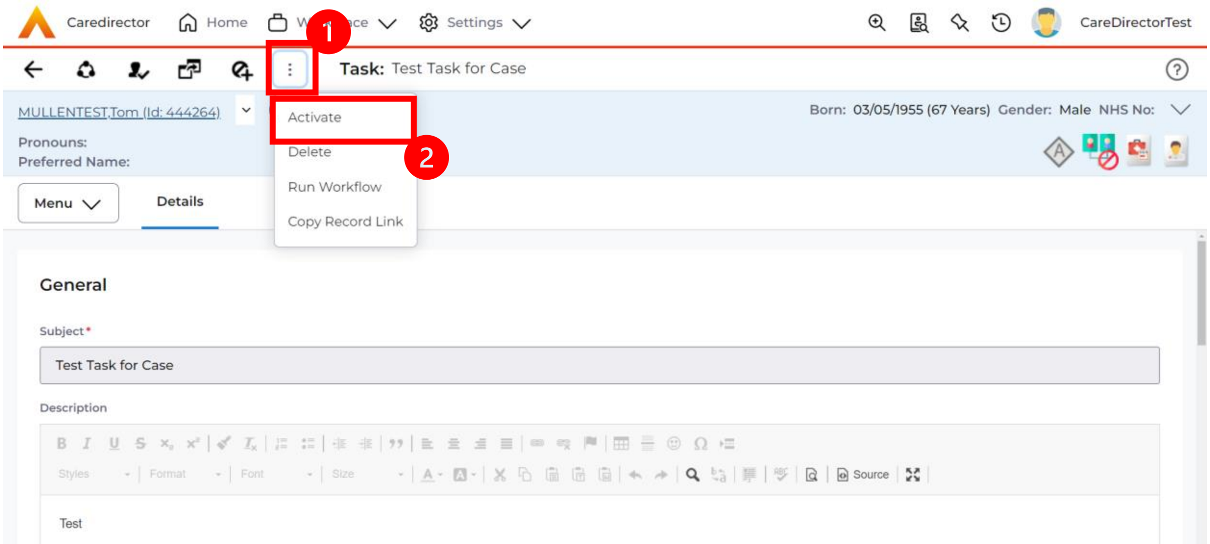
How to change status to Complete (Re-activate Activities)

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

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

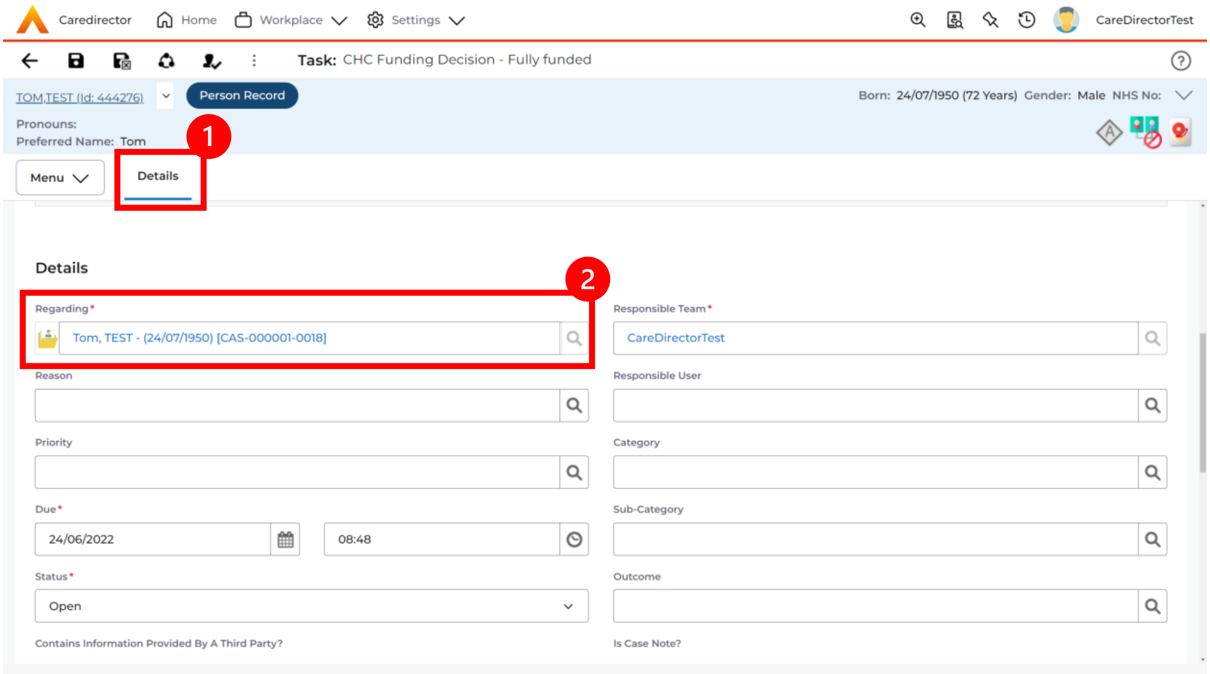


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

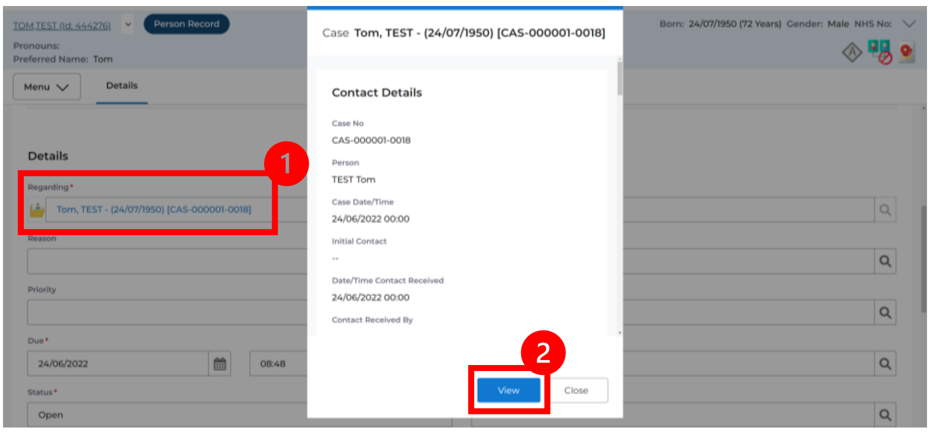
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



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

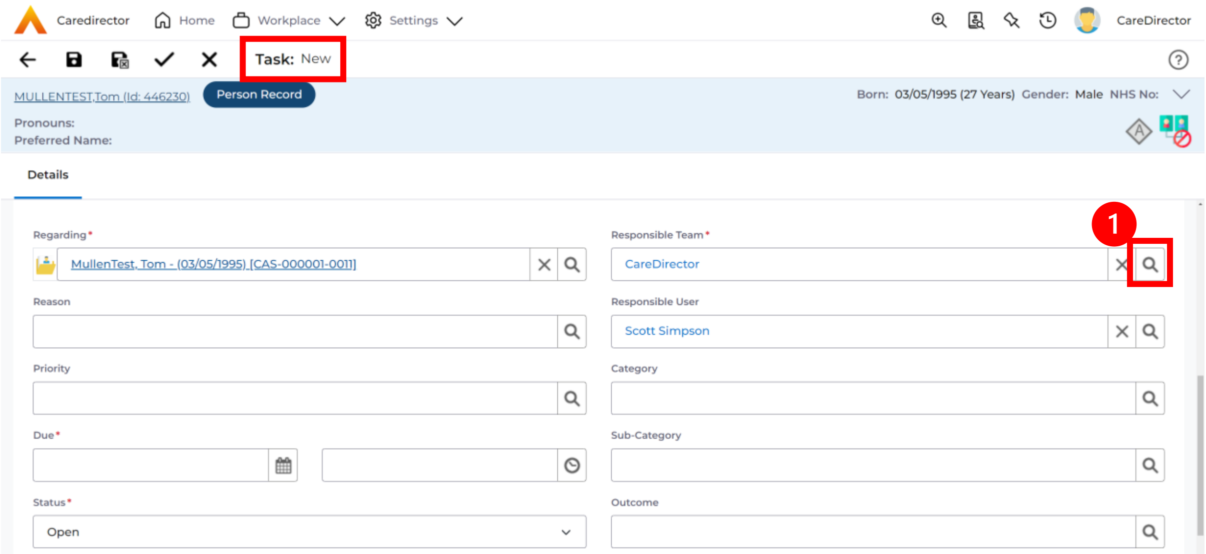
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record)** and go into the record by selecting **View.**

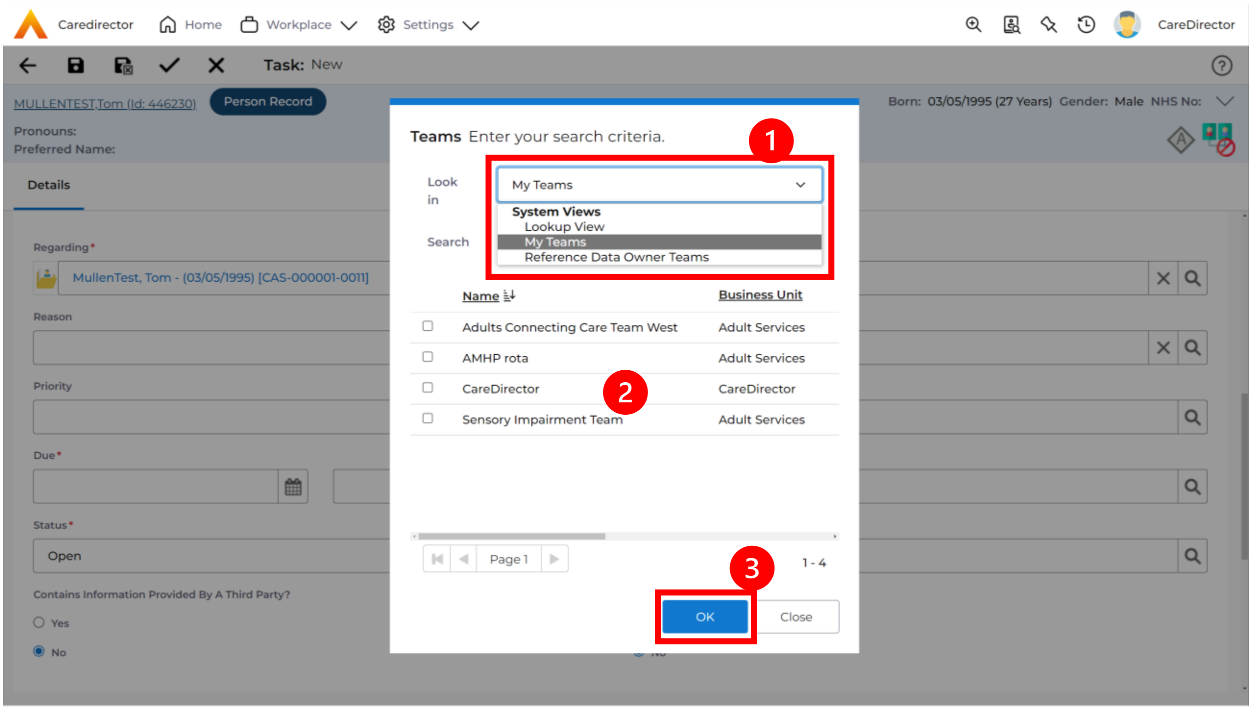


How to Allocate a new Activity to another team

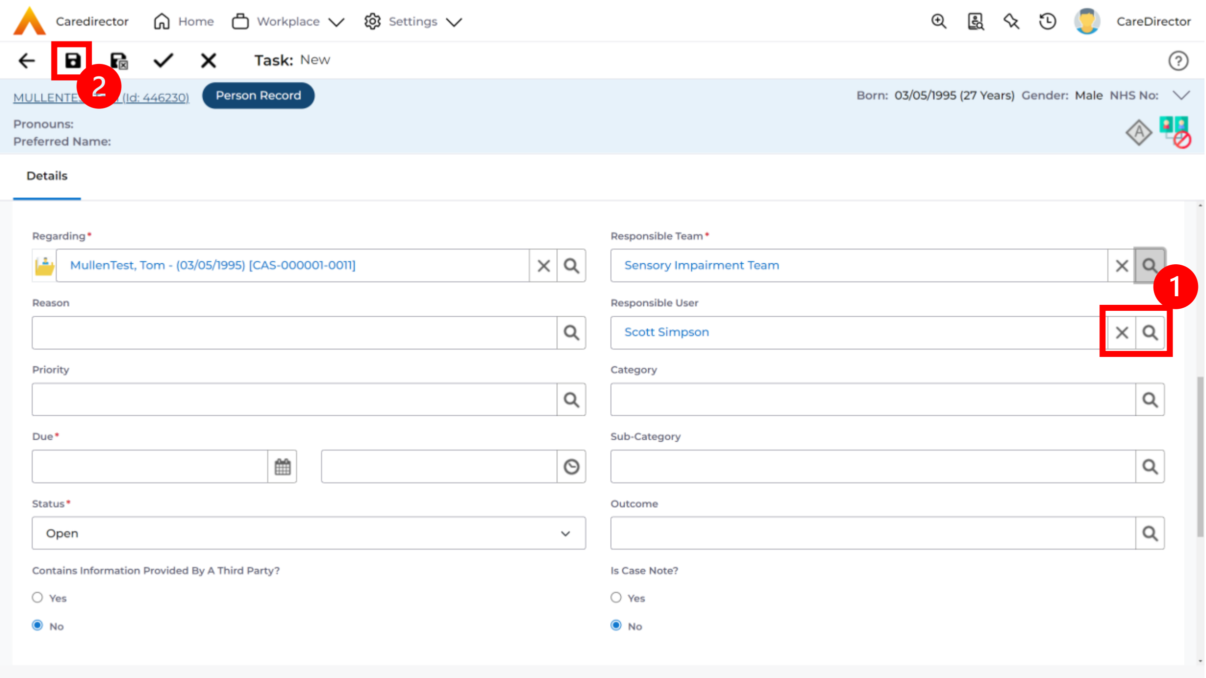
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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

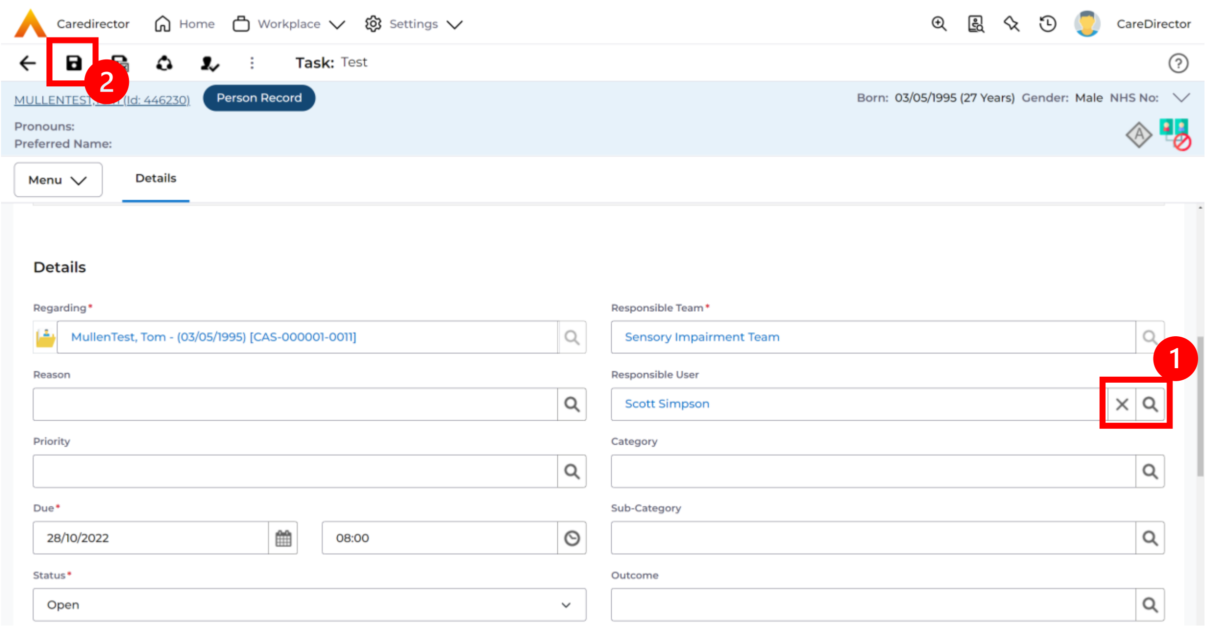


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

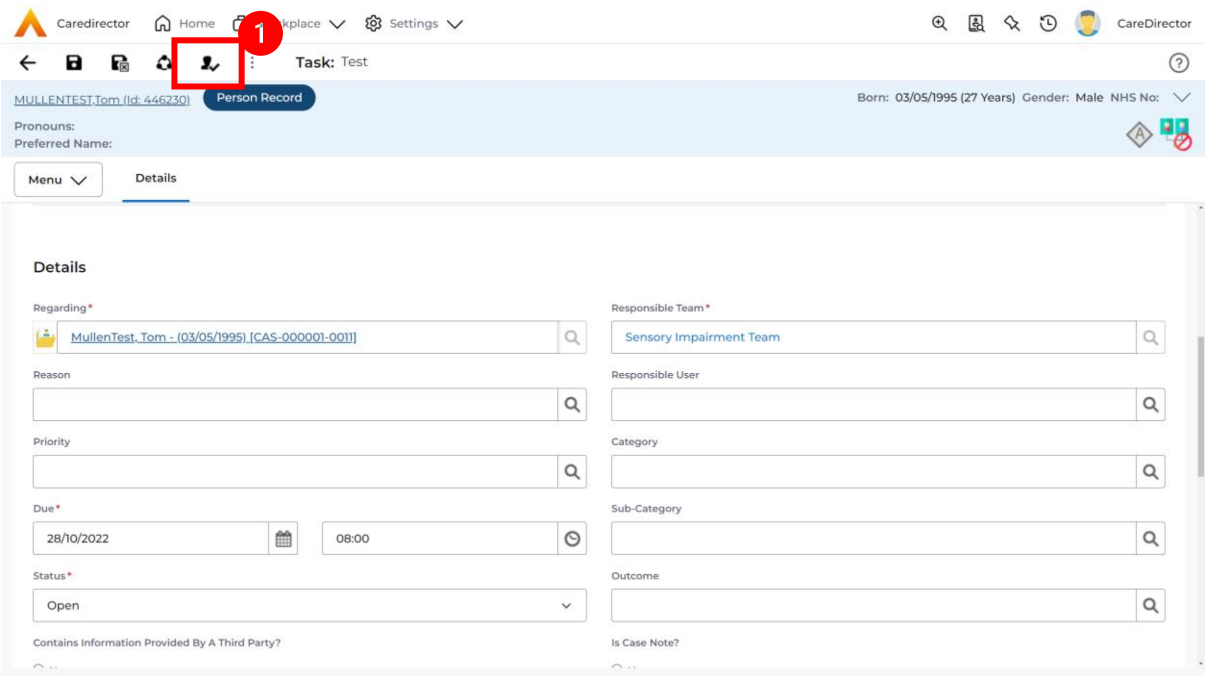


How to Allocate an existing Activity to another team

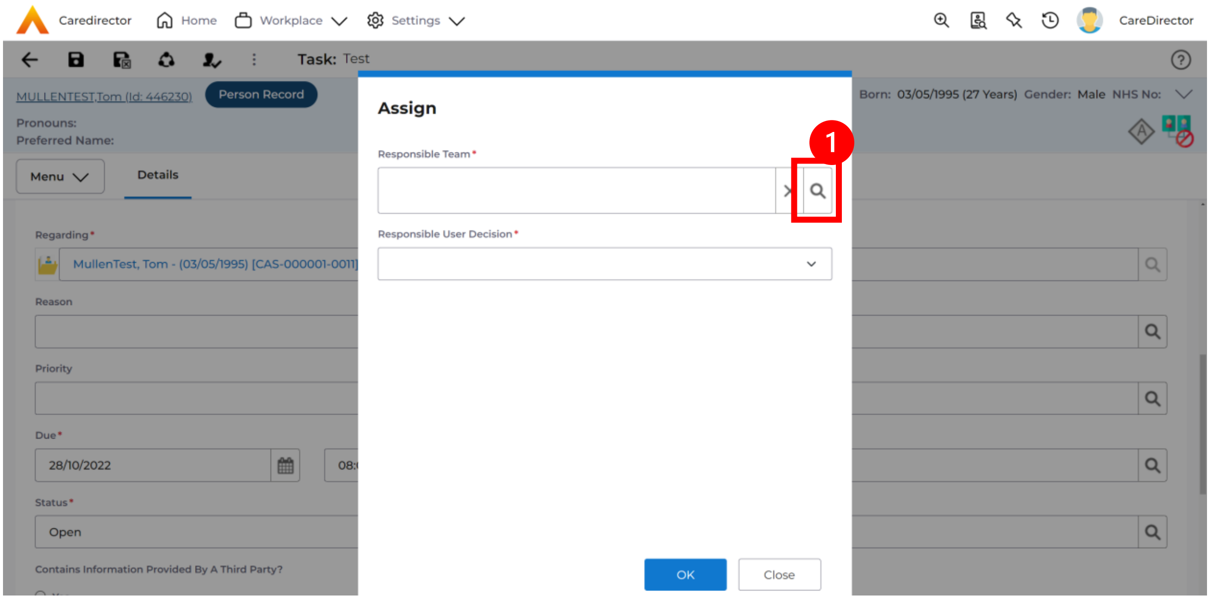
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



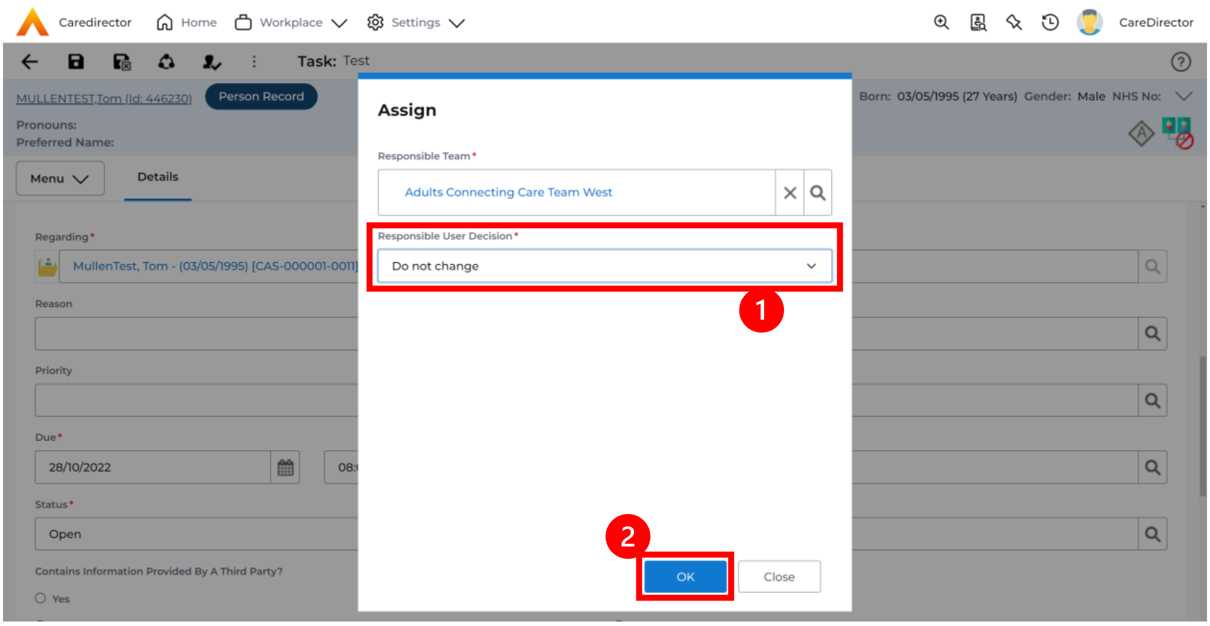
2. Next select **Assign this record to another team** from the toolbar.



3. This will open a new window. Choose the **Responsible Team** that this **Activity** will be sent to using the **Lookup function**. Remember to use **Look in** once selected to pick from other teams.



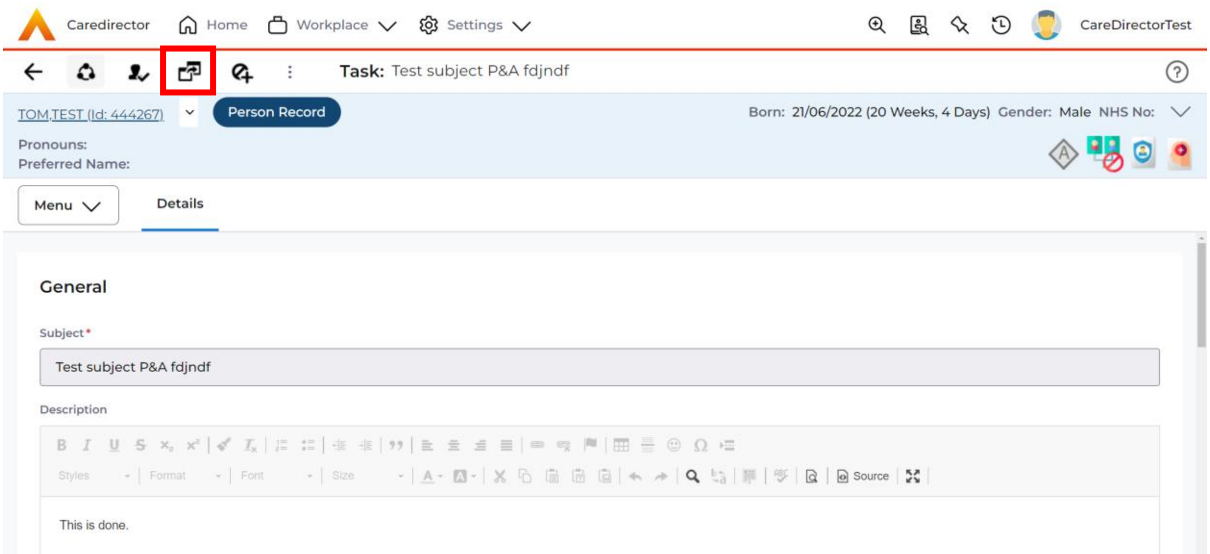
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



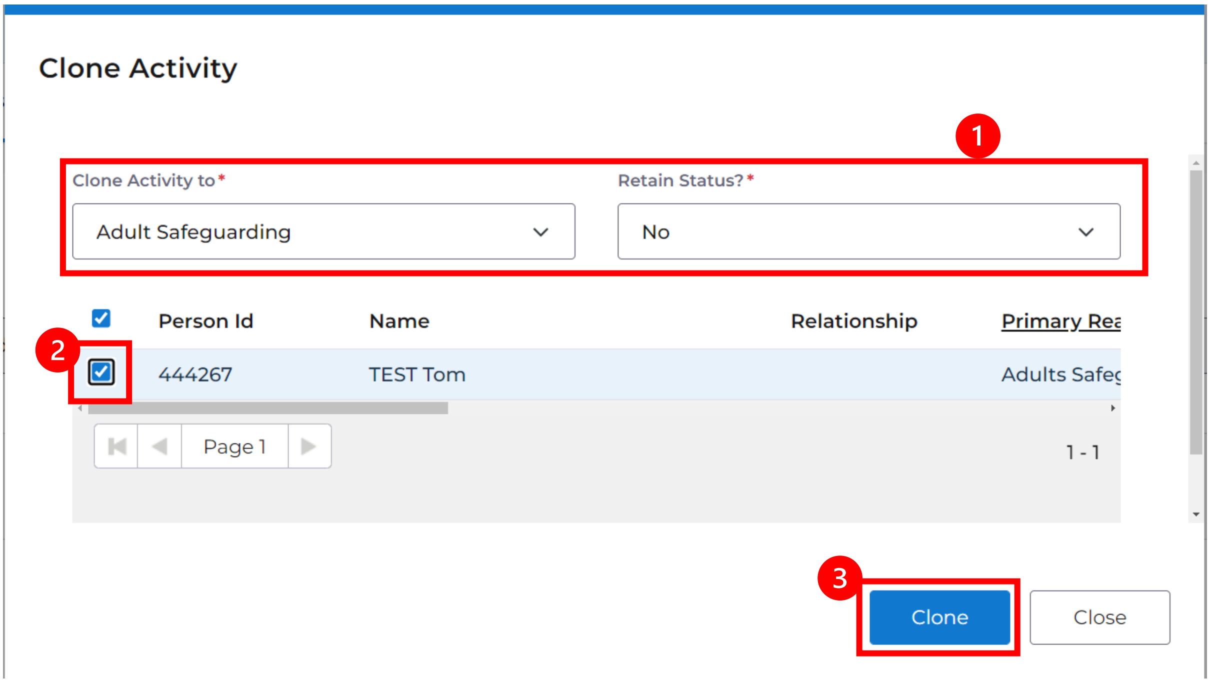
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

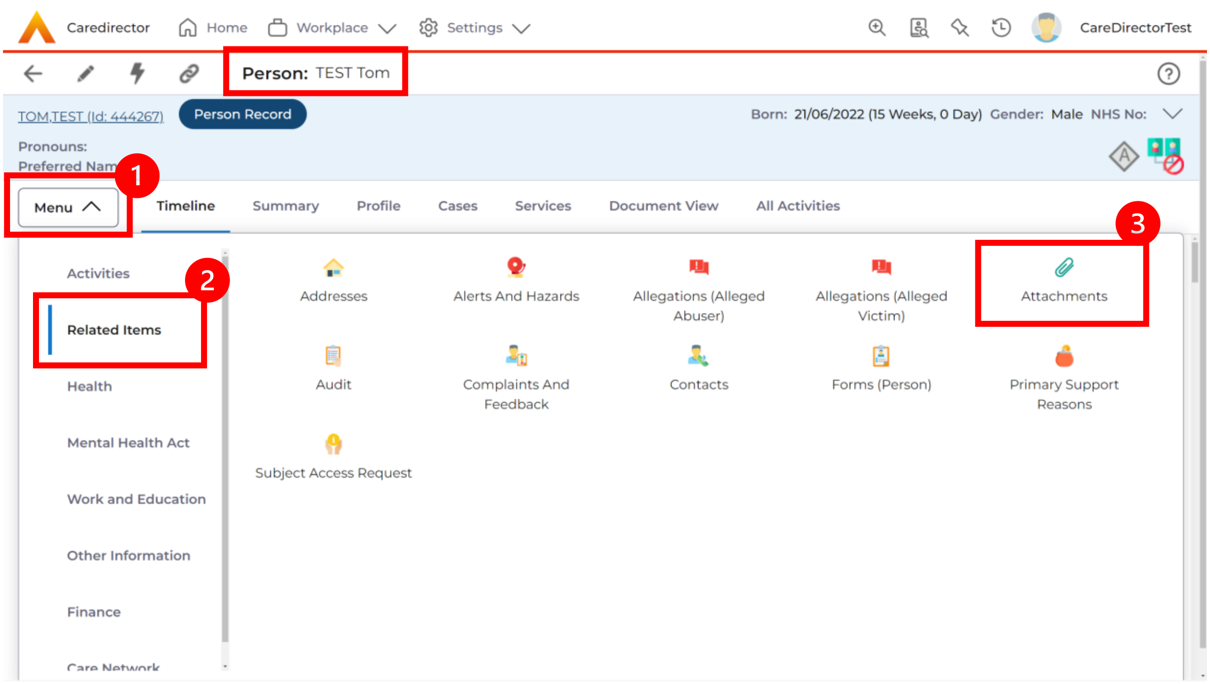


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

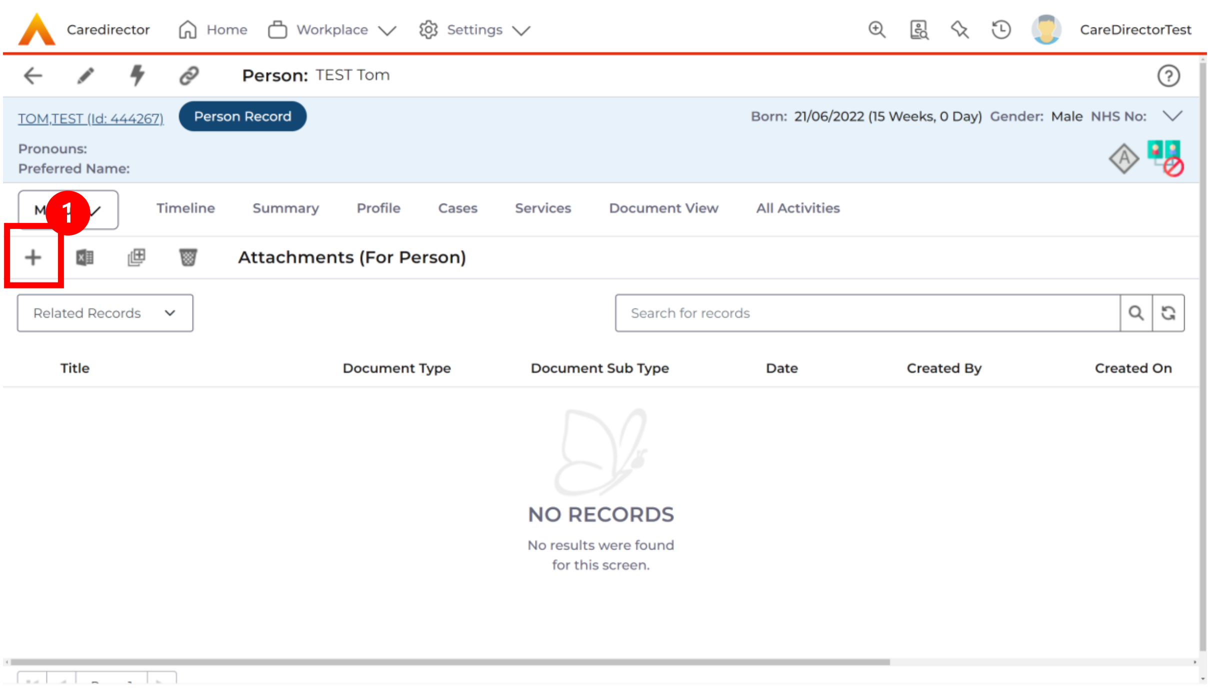


How to upload Attachments

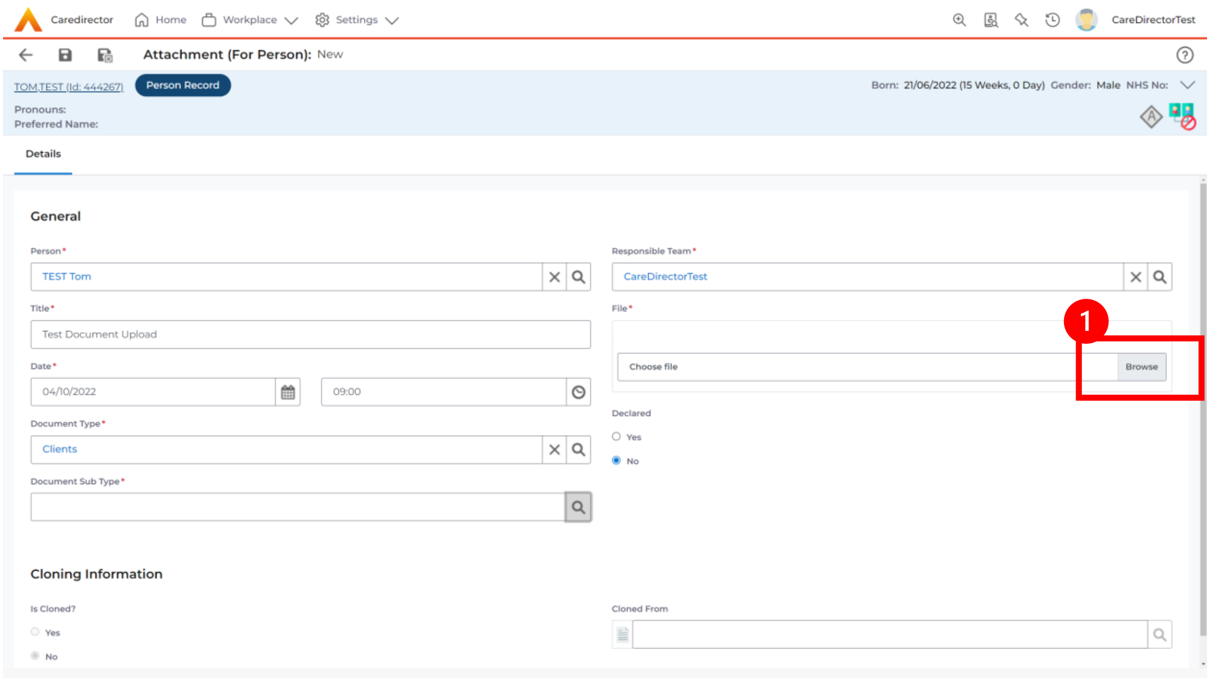
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



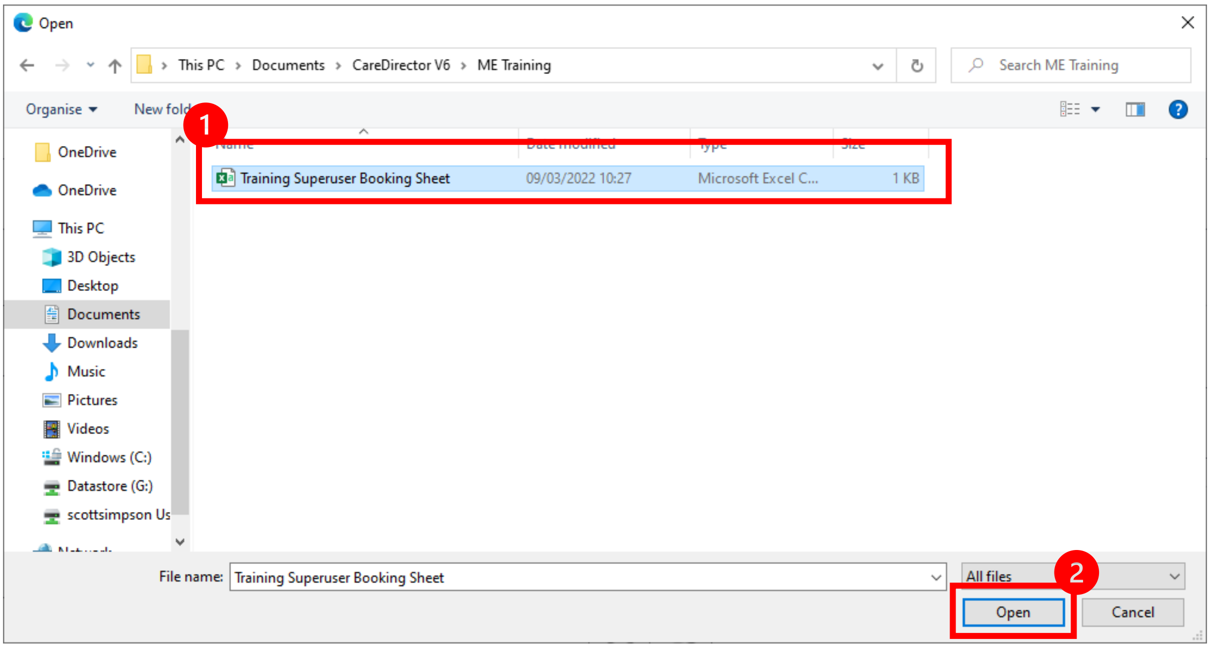
2. When opened, select the **Create New Record** from the toolbar.



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



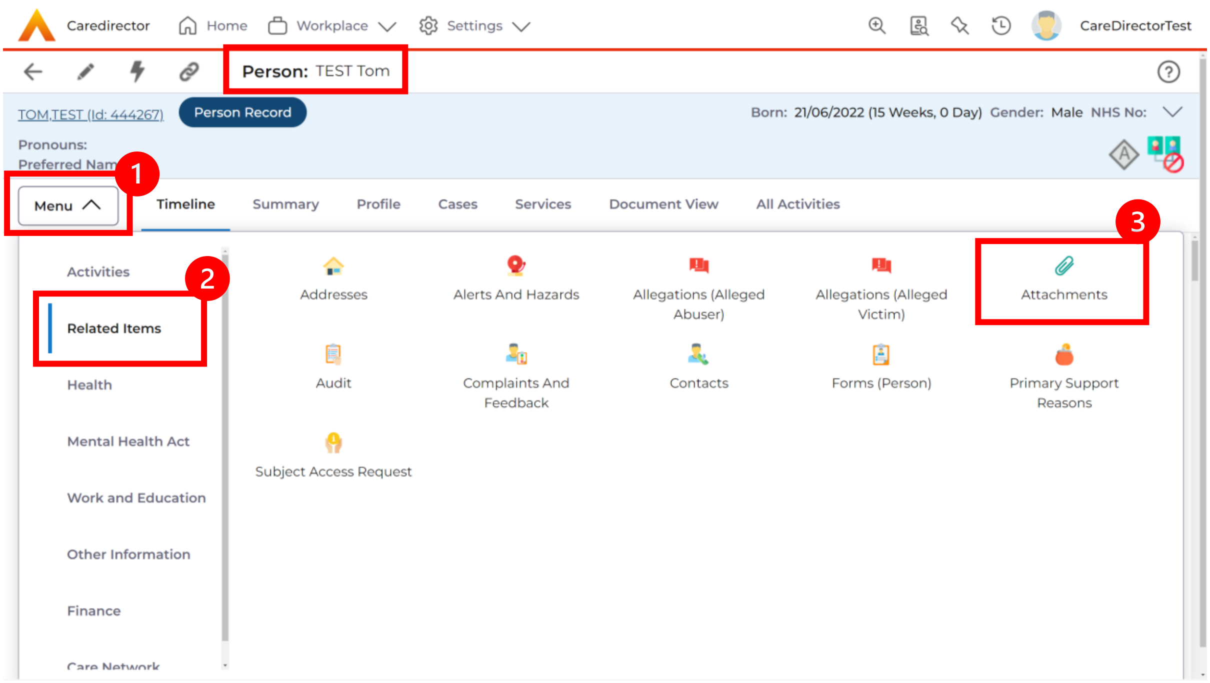
4. Select a **File** from your computer/ SharePoint and select **Open.**



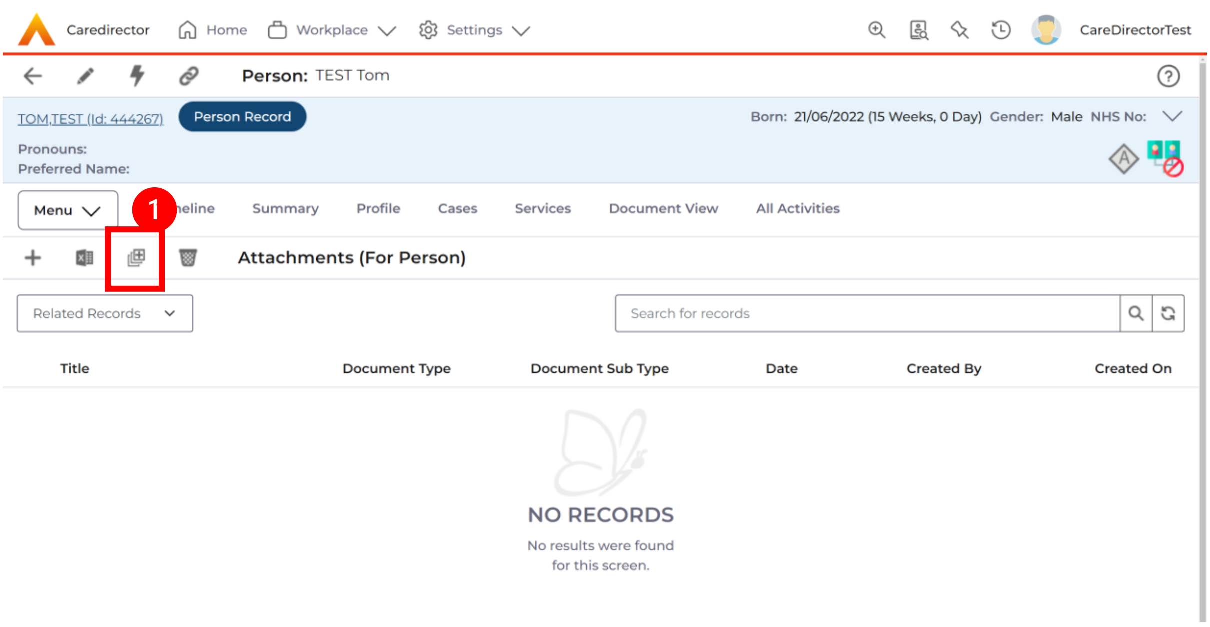
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

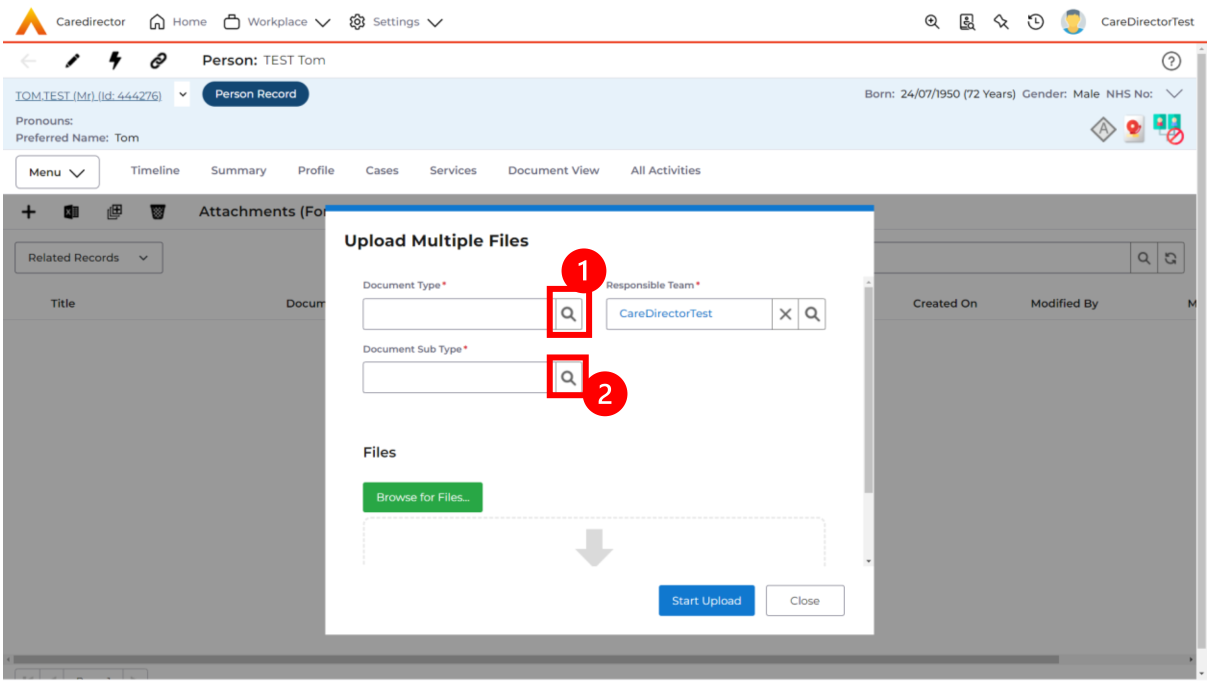
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



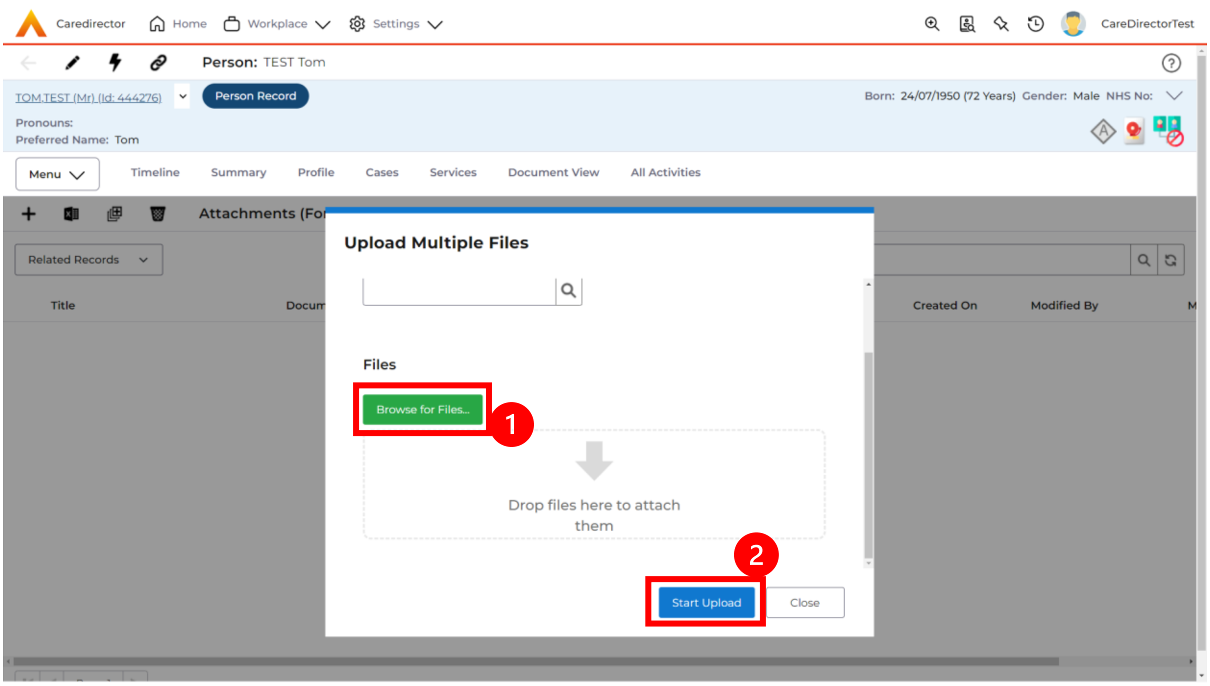
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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



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

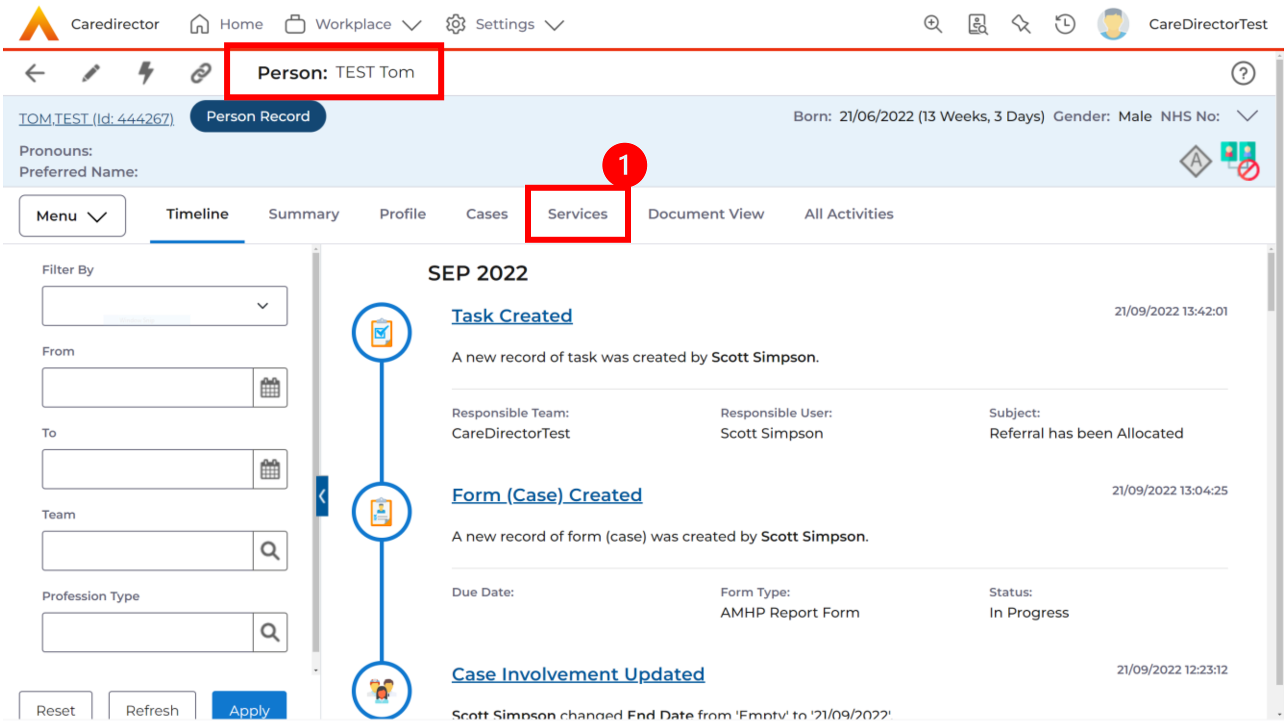


How to input Service Provisions

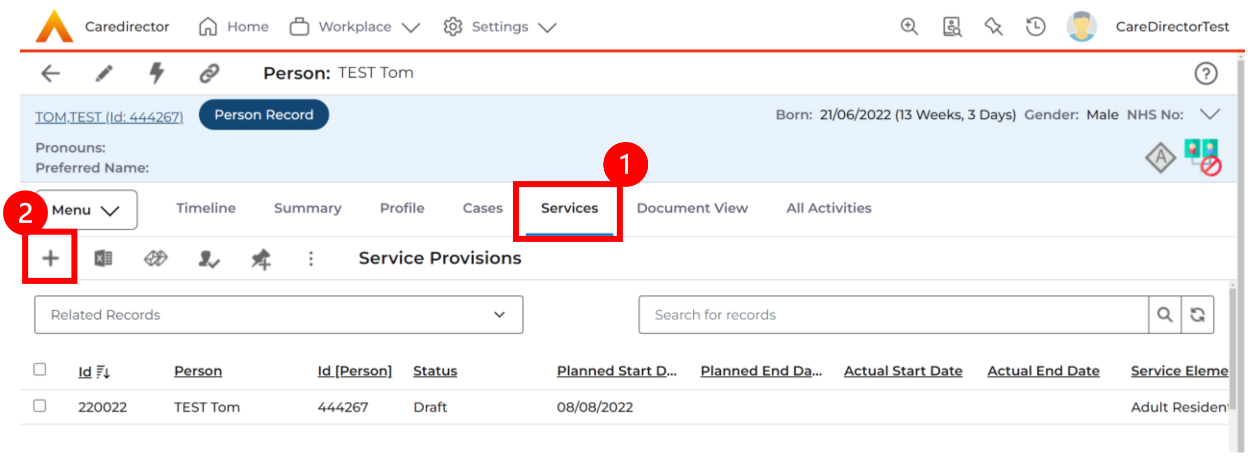
Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.

2. Select the relevant **Person Record** and select **Services**.



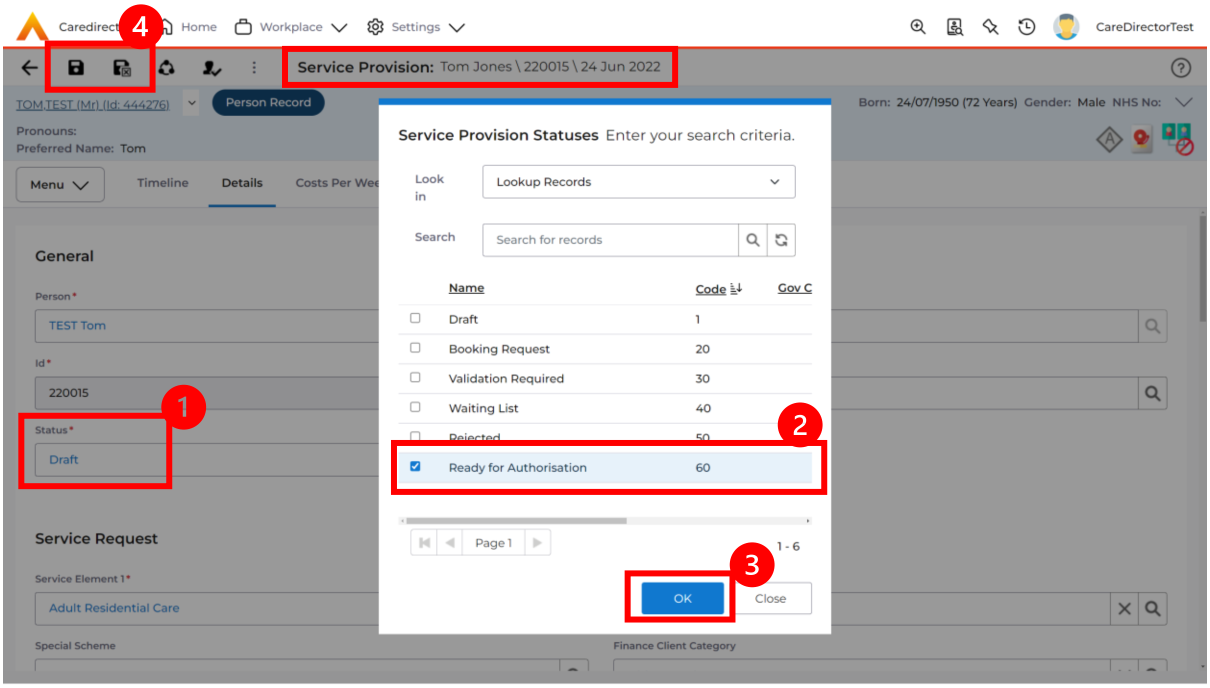
3. After selecting **Services,** if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



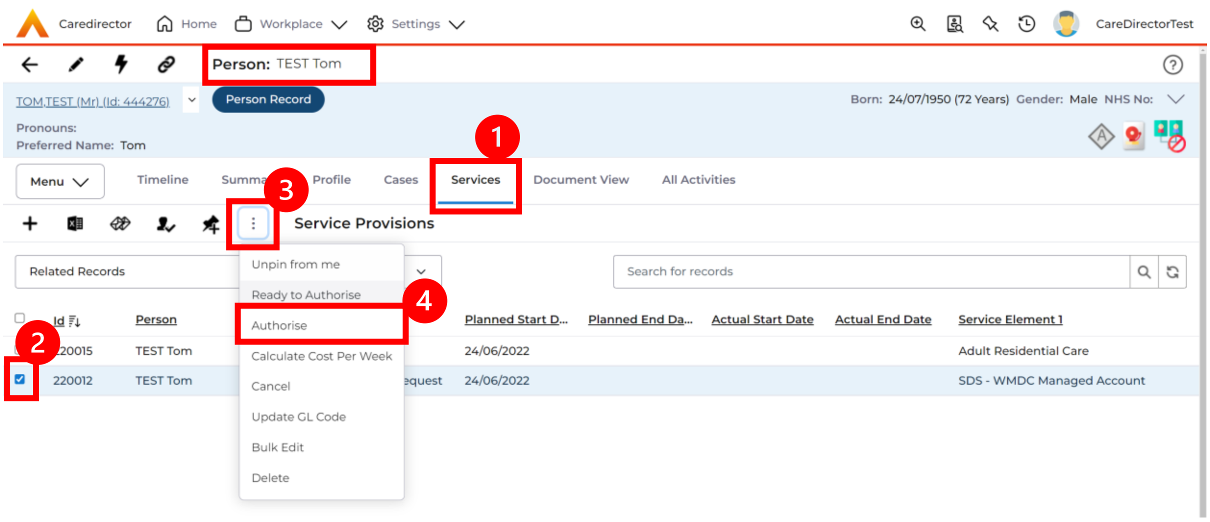
4. Then follow the appropriate section to complete the **Service Provision.**

How to Authorise a Service Provision

1. Locate the **Service Provision** and make sure the **Status** is **Ready for Authorisation.** If it is not, then go into the record and change the **Status** to **Ready for Authorisation** then select **Save.**

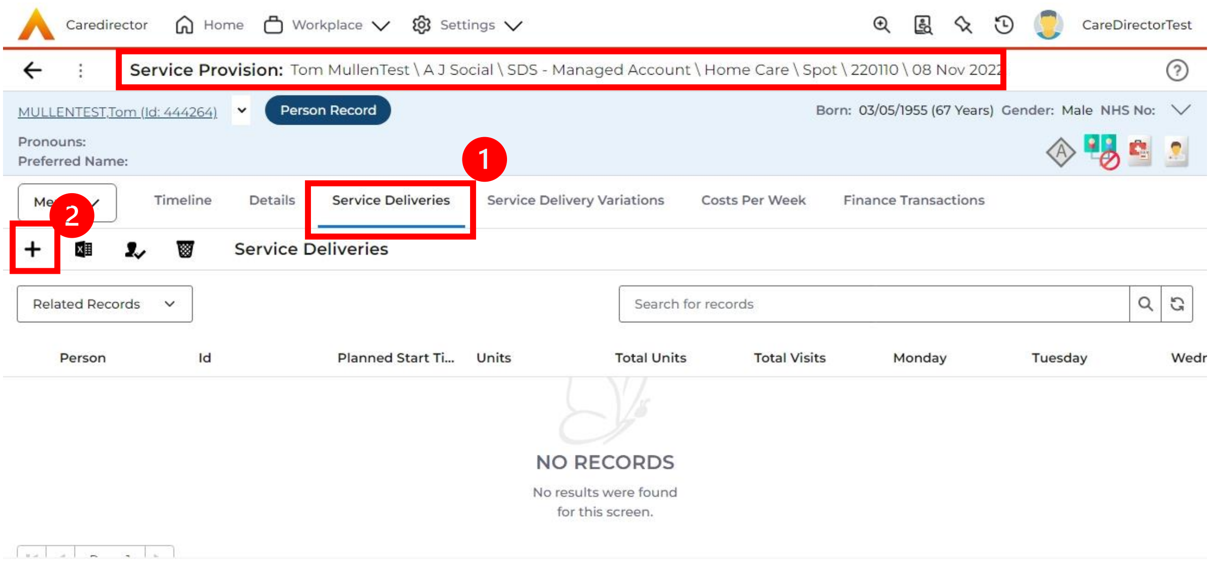


2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise.**



How to input Service Deliveries

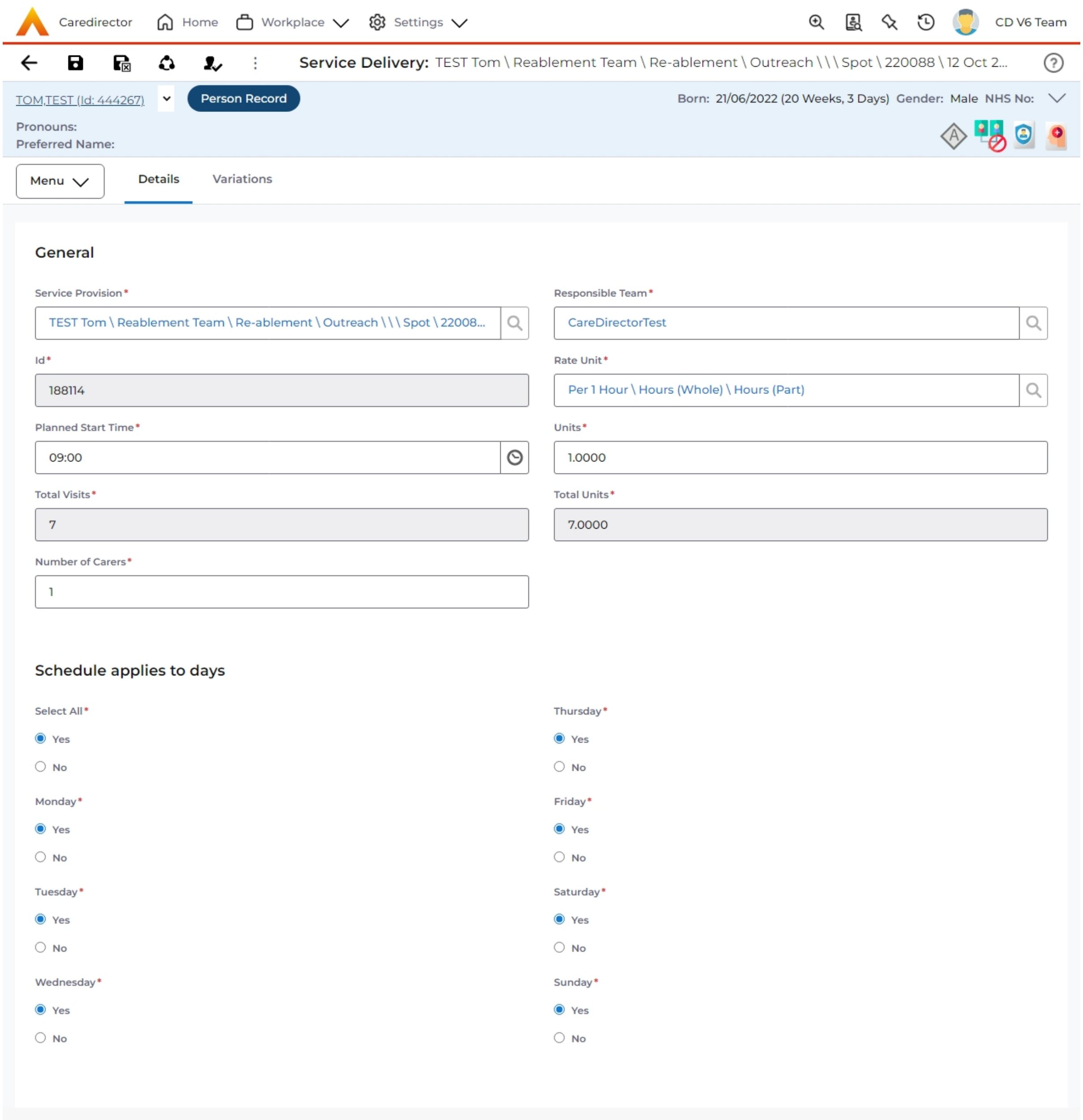
1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.



2. Now select the information required. **Units** is based around **1** being a **1 of the Rate Unit**. For example, if your **Rate Unit** shows **Per 1 Hour Unit** then you put **Units** as **1** this will record that each visit will be **1 hour long**. If it says **0.5** it will be **half an hour each visit.**

3. **Planned Start Time** is the time that the visit takes place on the chosen dates. If more than one visit is required and at different times, then when **Saved** create a new **Service Delivery.**

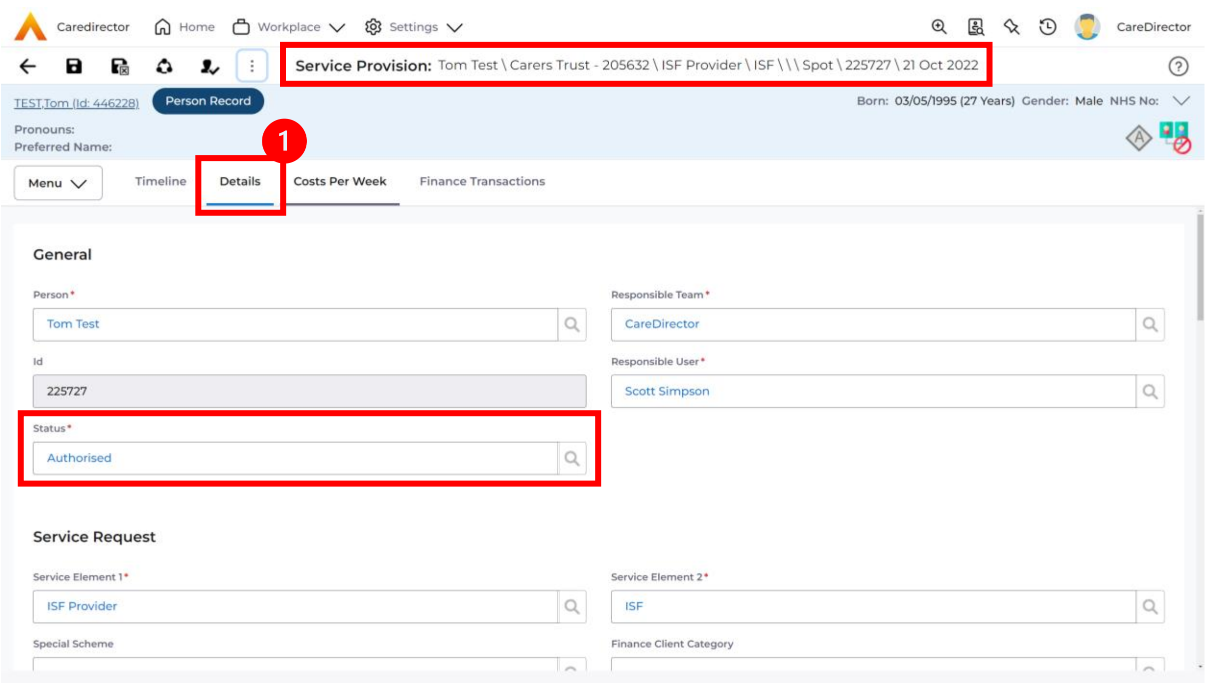
4. Once **Saved,** this will automatically generate **Total Visits/ Total Units.**



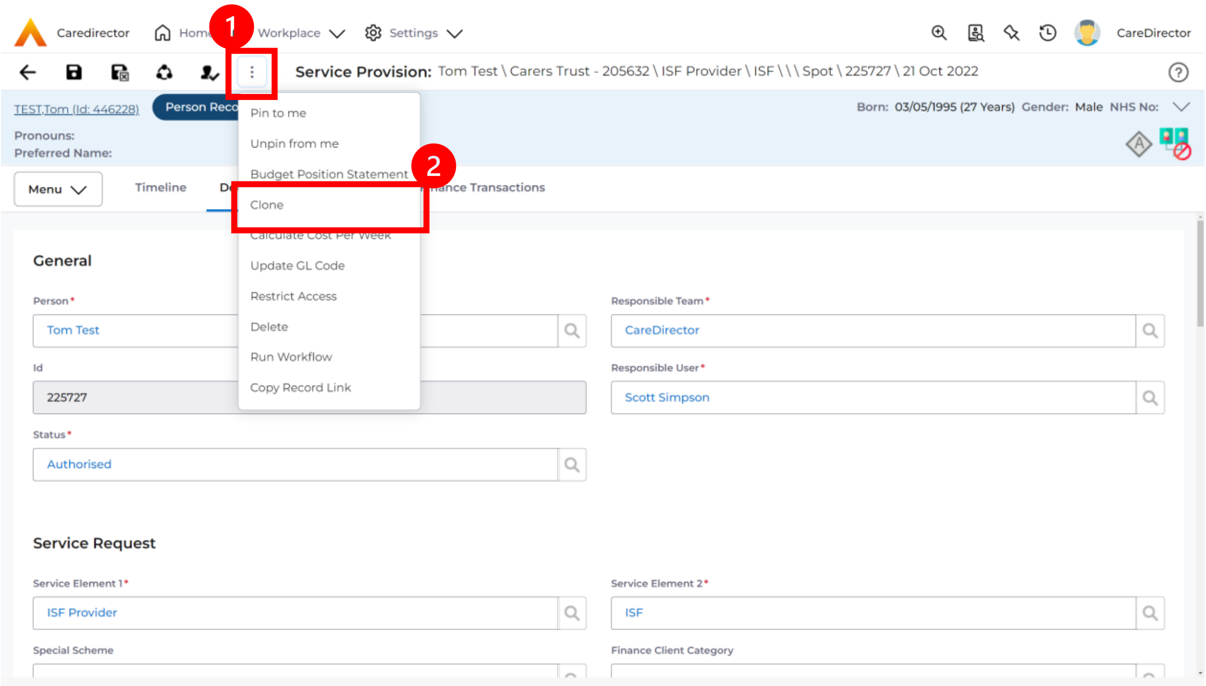
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

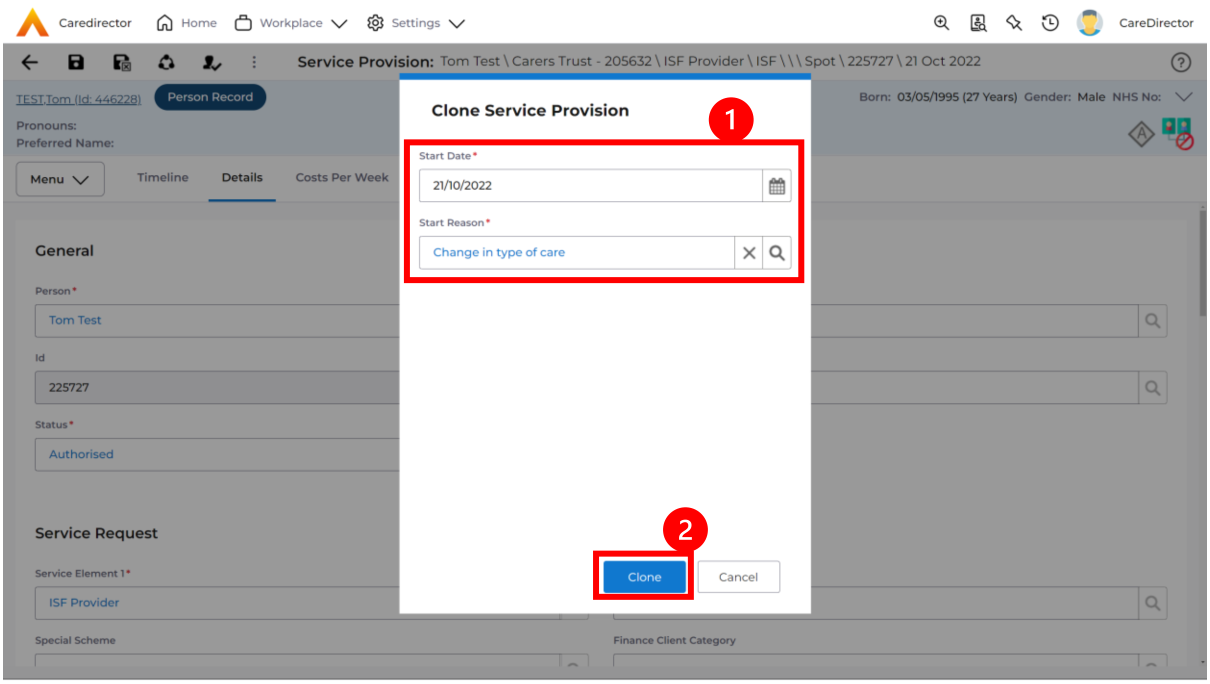
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised.**



2. Select the **Three Dots** from the toolbar and select **Clone.**

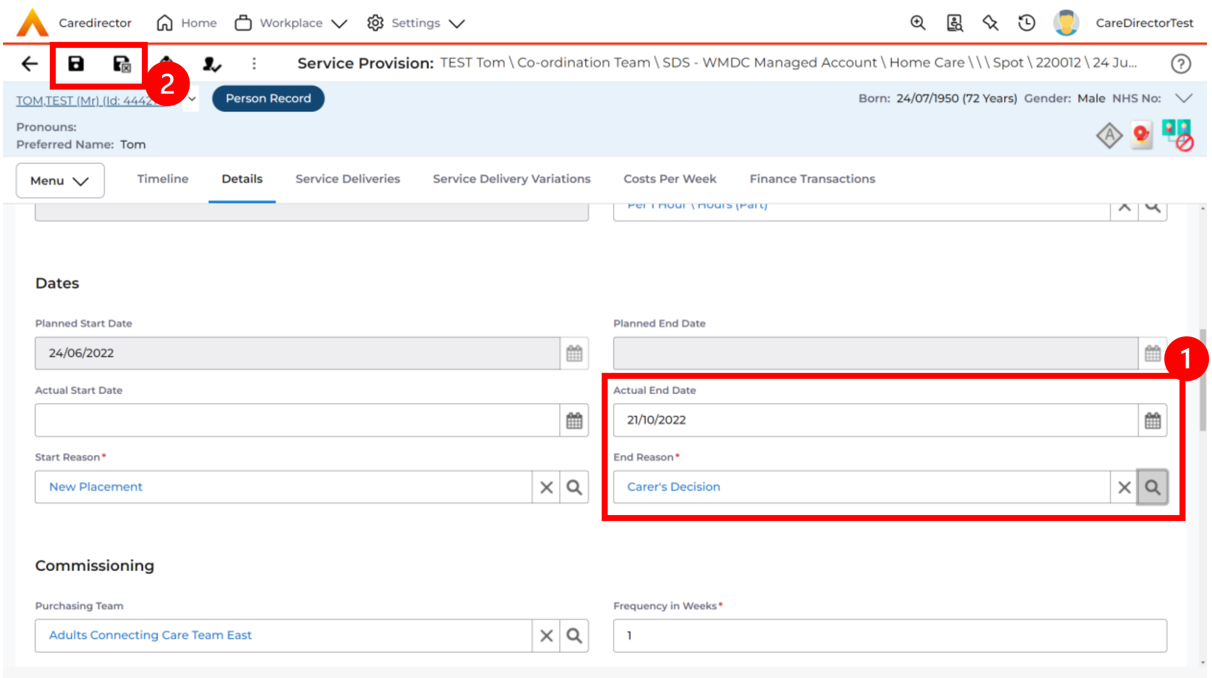


3. Select the new **Start Date** and **Start Reason** and select **OK**.



How to End Service Provisions

1. Locate the **Service Provision** that requires an end date. Select the **Details** tab, scroll down to the **Dates** heading and enter an **Actual End Date** and **End Reason**. When finished, select **Save.**

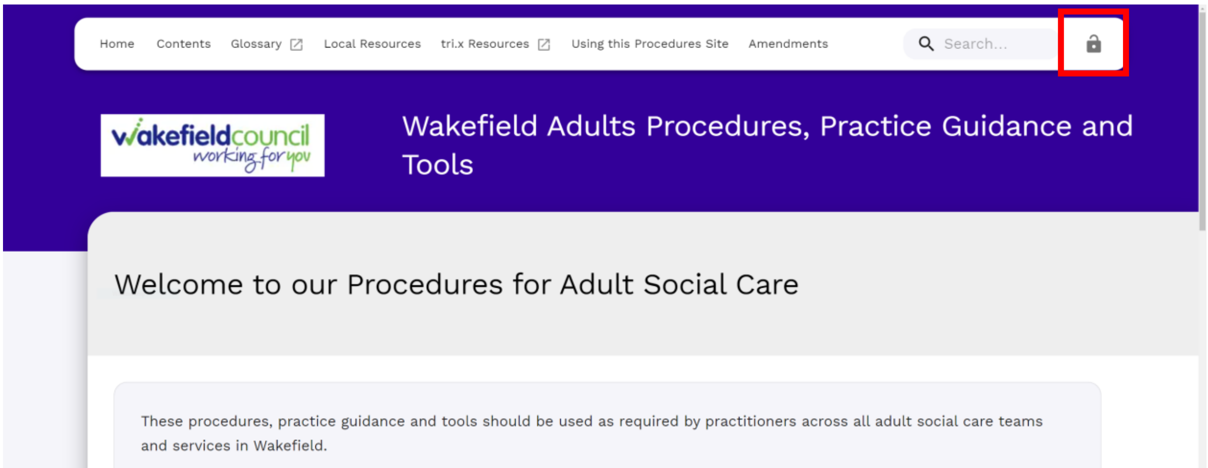


Further CareDirector Guidance

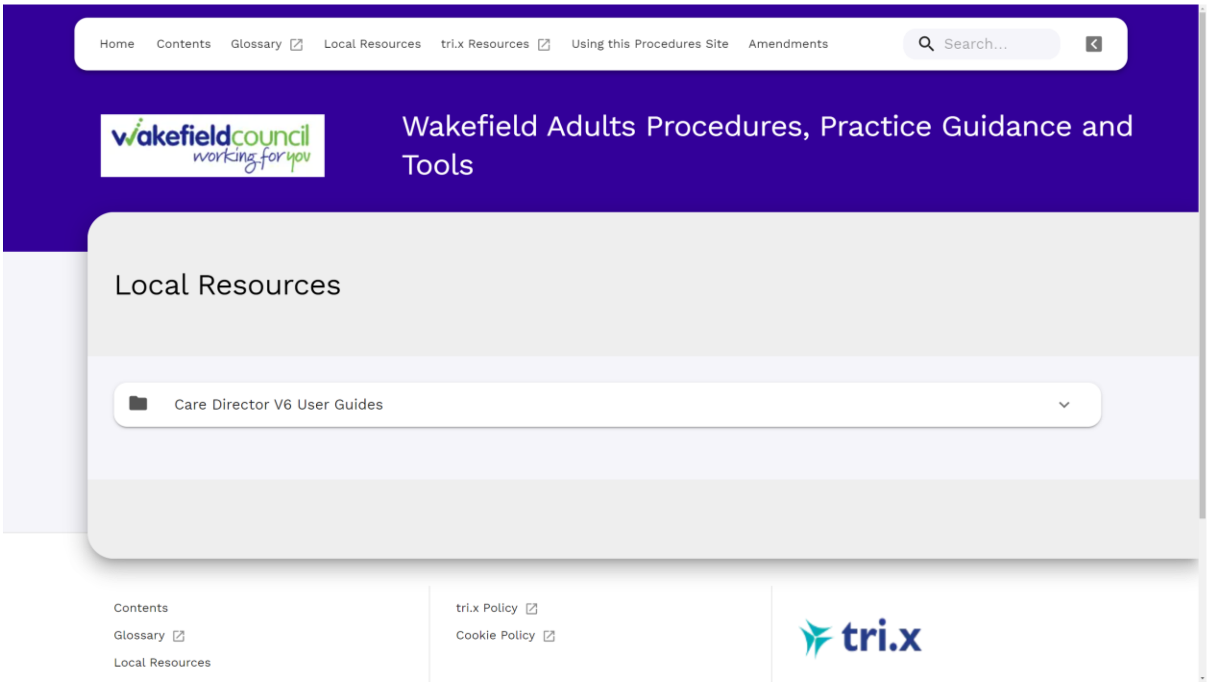
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

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