



Peripatetic Support Team V1.0

Document CareDirector Peripatetic Support Team.
Purpose Peripatetic Support Team daily tasks on CareDirector.
Version V1.0
Owner ICT Business Transformation Team
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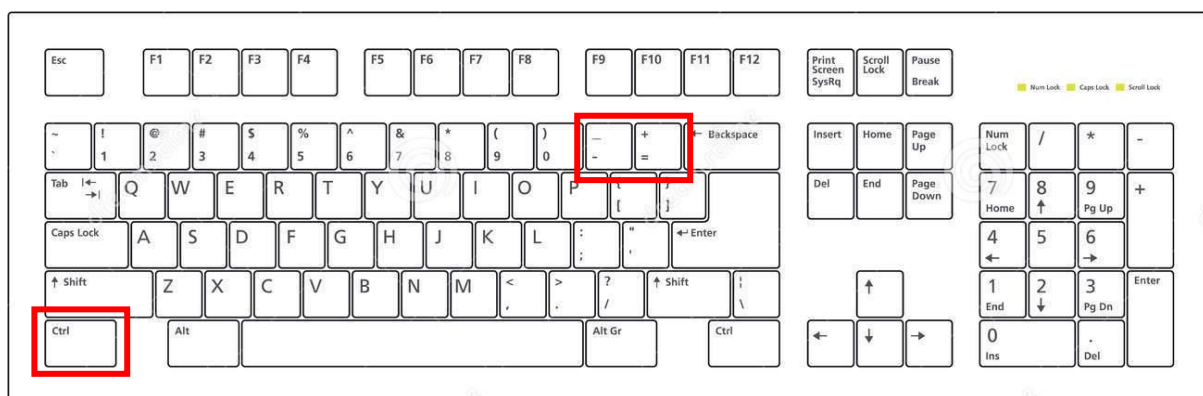
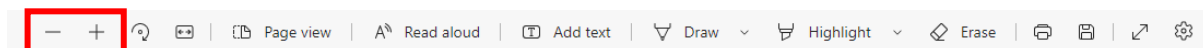
Guide Information

Before Live Access...

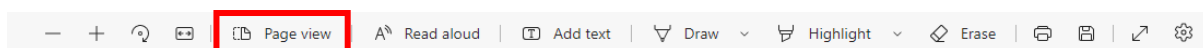
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

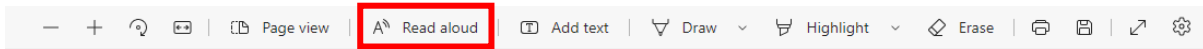
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



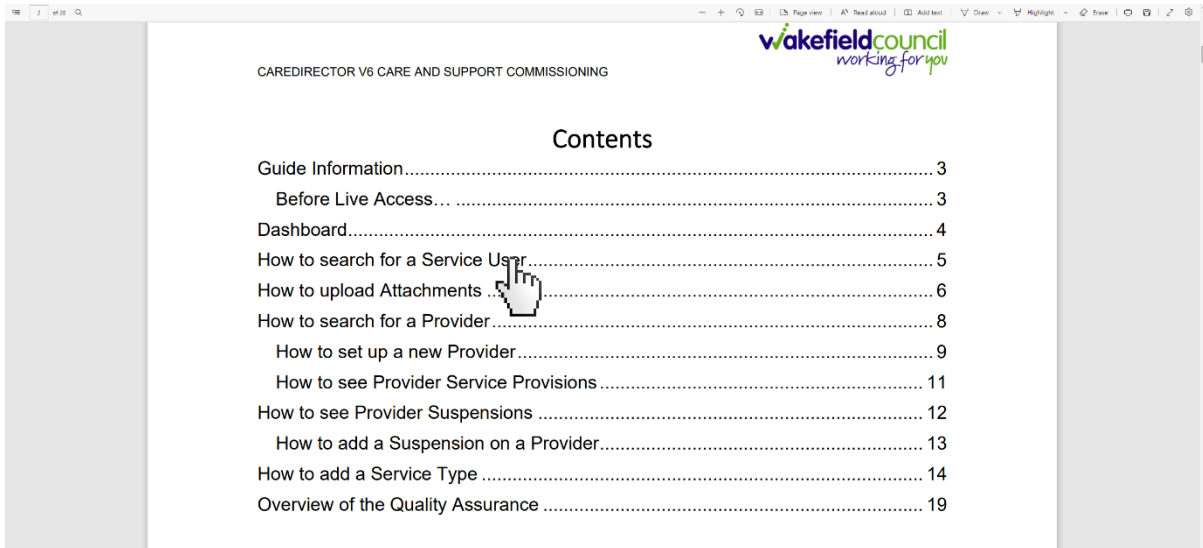
3. To put pages next to one another, select the **Page View** icon on the toolbar.



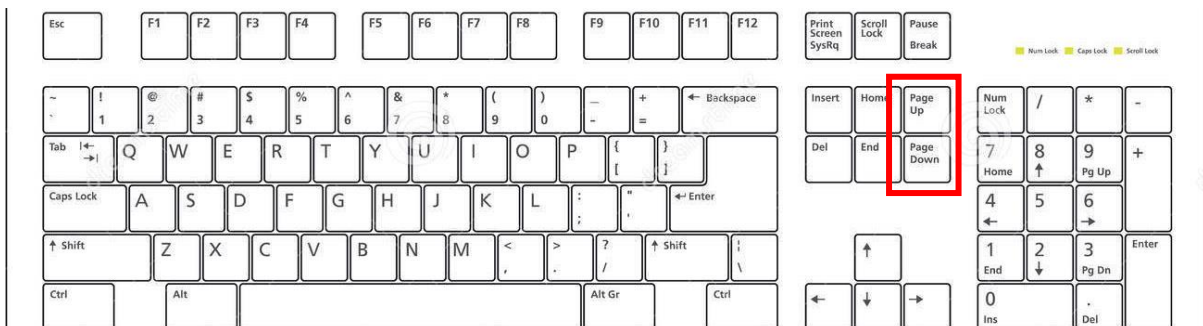
4. For auditory assistance, select **Read Aloud** from the toolbar.



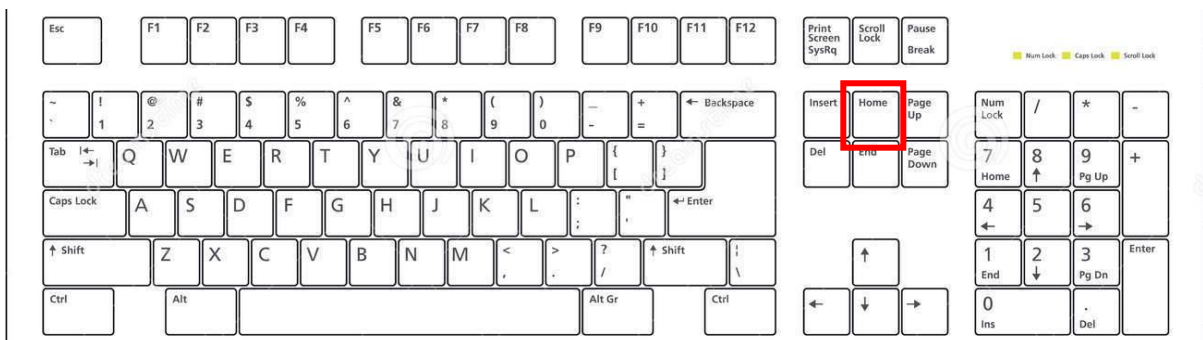
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

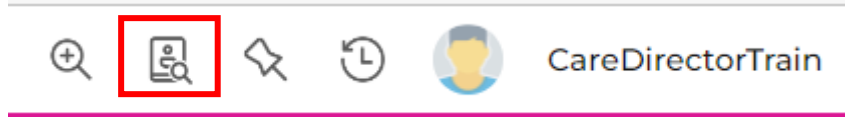


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

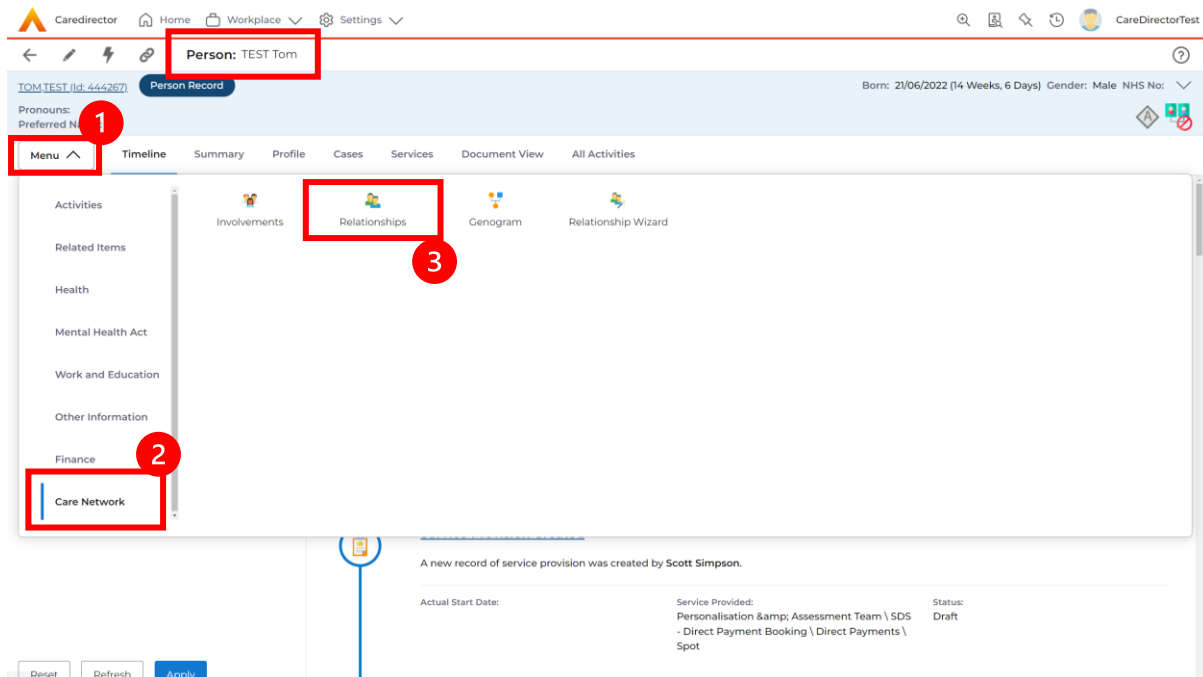
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for 'OCT 2022' and 'SEP 2022', including 'Form (Case) Created',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

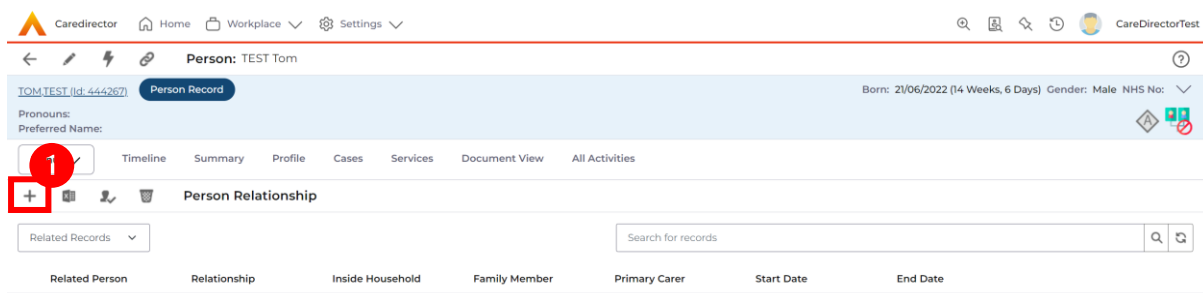
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page shows a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no NHS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

is a*
 Brother

To*
 Tom MullenTest

Reciprocal Relationship

Person
 Tom MullenTest

is a*
 Brother

To
 TEST Tom

Relationship Details

Start Date*
 03/10/2022

Responsible Team*
 CareDirectorTest

End Date

Description

Nature of Relationship to Primary Person

Inside Household	Primary Carer
Family Member	Powers of Attorney
Next of Kin	Power of Attorney for Property and Financial Affairs
Emergency Contact	Financial Representative
Key Holder	Young Carer
Advocate	Legal Guardian
MHA Nearest Relative	Secondary Caregiver
Is Birth Parent	Has Parental Responsibility

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, the navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a search icon. The user is identified as 'CareDirector'. Below the navigation bar, the person's name 'Person: Test Tom' is displayed, with the 'Edit' icon (pencil) highlighted by a red box and a '1' in a red circle. The 'Person Record' title is also highlighted with a red box. The main content area shows the person's details: 'TOM,Test (Id: 446229)', 'Born: 03/05/1996 (26 Years)', 'Gender: Male', and 'NHS No:'. Below this, there are tabs for 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is selected, showing a filter section on the left and a list of activities for 'OCT 2022'. The activities include 'Form (Case) Created' and 'Task Created', both dated 'Yesterday at 11:12' and 'Yesterday at 11:08' respectively.

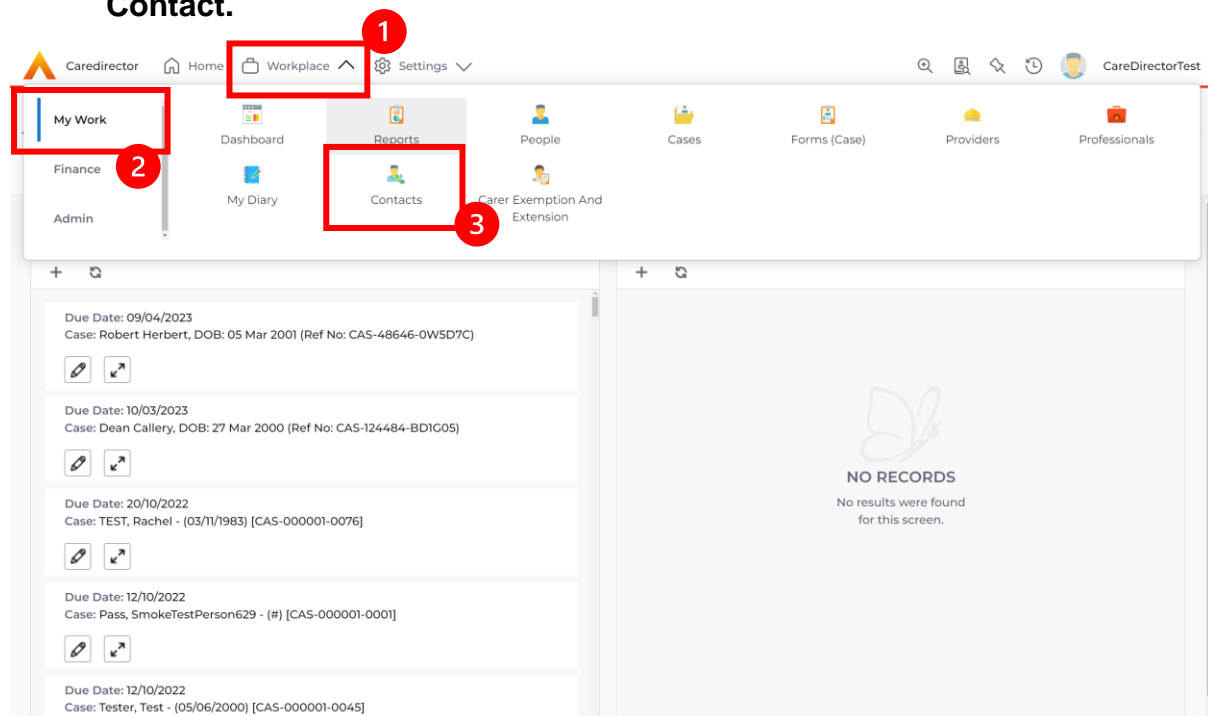
2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes**.

The screenshot shows the 'Death Information' section of the person record. The 'Deceased' option is set to 'Yes' (radio button selected). Below this, there are fields for 'Cause of Death' and 'Place of Death'. The 'Cause of Death' field has a search icon on the right. The 'Date of Death' field is also visible, with a calendar icon on the right.

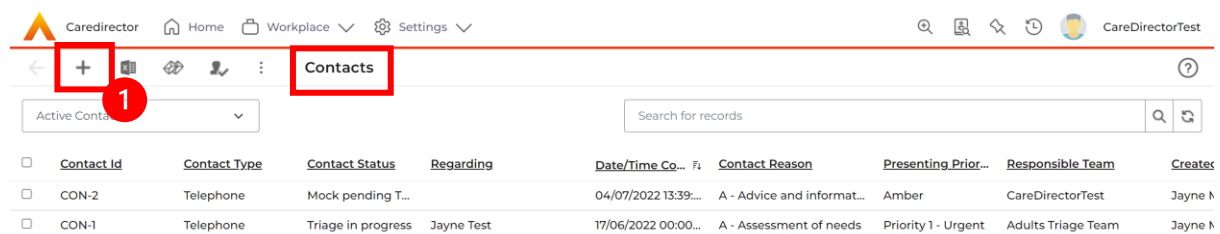
3. Enter in the details if known, when finished select **Save**. This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker**.

How to 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 text 'Person: TEST Tom'. Below the header, there's a section for 'TOM.TEST (Id: 444267)' with a 'Person Record' button. The main content area is divided into a left sidebar and a main grid of icons. The sidebar has a 'Menu' button (circled 1) and a 'Related Items' option (circled 2). The main grid contains various categories 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' icon is circled 3.

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

The screenshot shows the 'Contacts' section of the Caredirector interface. It features a search bar and a table of related records. The table has the following columns: Contact Id, Contact Type, Contact Status, Regarding, Date/Time Contact R..., and Contact Reason. A single record is visible:

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**.

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

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

How to link a Contact to a Person Record

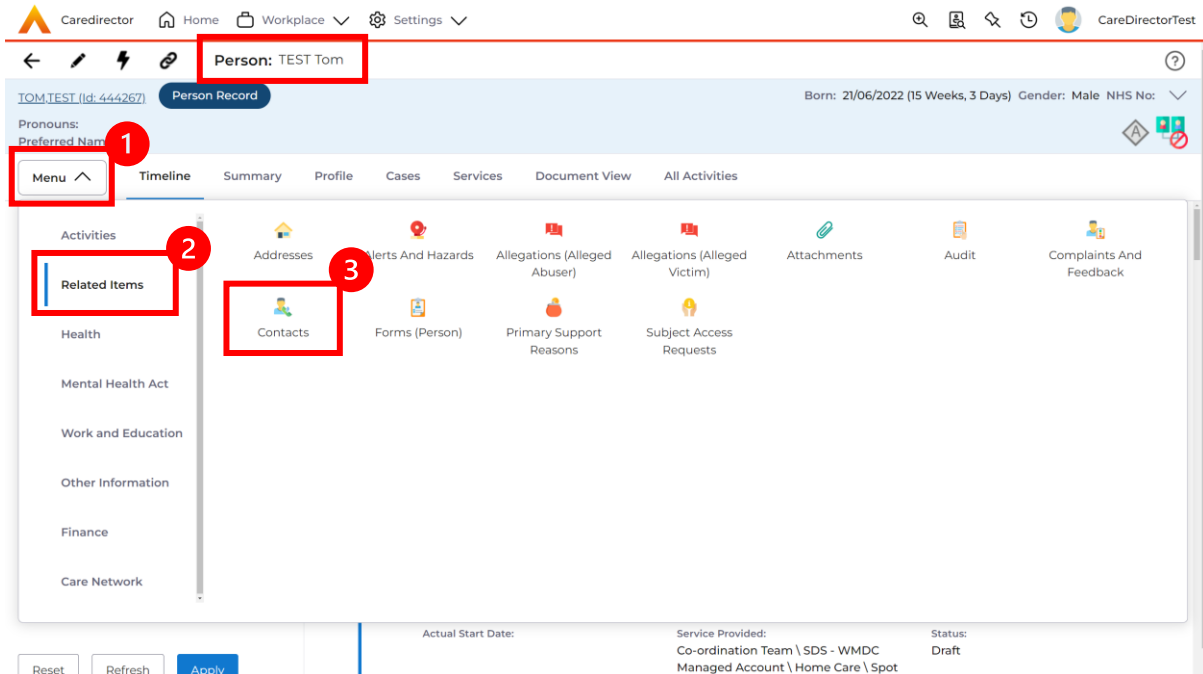
1. A **Contact** can be linked to a **Service User** later when details become known, and they are created into **CareDirector**.
2. After the **Service User** has been created onto the system and the **Contact** is triaged. Locate the **Contact** and under **Regarding** find the created **Service User**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

The screenshot shows the 'Contact Information' section of a CareDirector record. The 'Regarding' field is highlighted with a red box and contains 'TEST Tom' with a search icon. A red circle with the number '1' is positioned next to the search icon. Other fields include 'Contact Id' (CON-2), 'Responsible Team' (CareDirectorTest), 'Responsible User' (Jayne Mullen), 'Date/Time Contact Received' (04/07/2022, 13:39), and 'Contact Type' (Telephone).

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

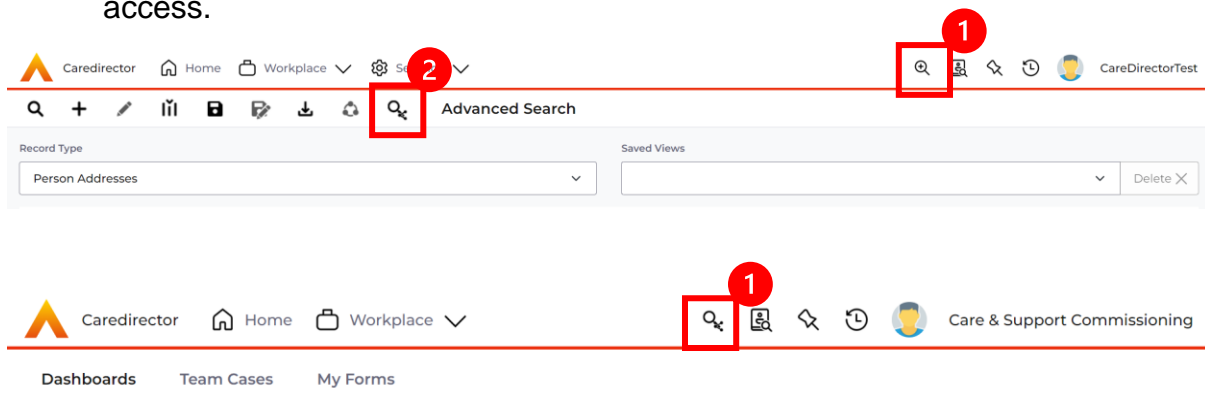
The screenshot shows the 'Contact Source' section. The 'Contact Made By' field is highlighted with a red box and contains 'Mr Smith (neighbour)'. A red circle with the number '2' is next to the search icon. Below this, the 'Is the Person/Group aware of the Contact?' field is highlighted with a red box and has 'Yes' selected. A red circle with the number '1' is next to this field. Other fields include 'Contact Source' (Individuals - Family/Friend/Neighbour) and 'Contact Made By (Free text)' (Mr Smith (neighbour)).

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

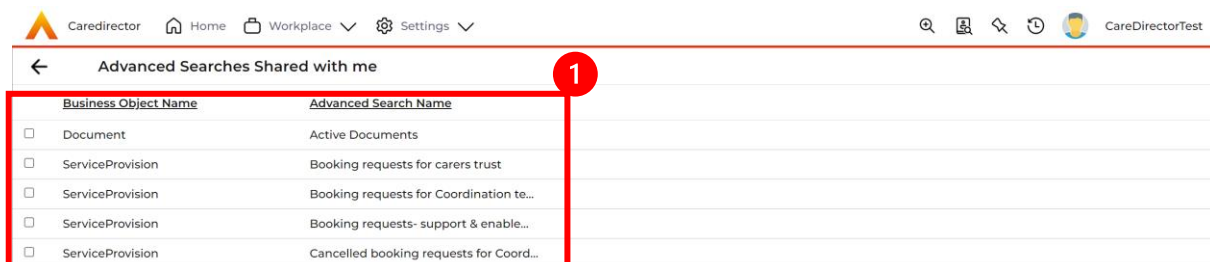


How to use Advanced Search

1. Most **Advanced Searches** are available through your **Dashboards**. However, situationally there may be a reason to use the **Advanced Search** button on the **Navigation Menu**. You are not able to build your own, you can only choose from pre-built **Saved** ones.
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.



3. Select from the list to automatically search for the pre-built **advanced search**. If nothing is shared with you independently, tell your superuser.



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 shows a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' and 'Service Provision Created', both created by Scott Simpson.

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

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 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. Below the tab, there is a search bar and a table of related records. The table has columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', 'Case Status', and 'Case No'. The first two rows of the table are highlighted with a red box and a red circle containing the number 2.

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

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 navigation shows 'Person: Tom MullenTest'. The 'Person Record' tab is highlighted with a red box and a '1'. Below the tabs, the 'Cases' section is visible, and the 'Create New Record' button is highlighted with a red box and a '2'. A table of related records is shown below.

<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 'Create New Record' button is highlighted with a red box and a '1'. The form is titled 'Details' and contains the following fields:

- Case No ***: [Empty text field]
- Person ***: [Tom MullenTest] [X] [Q]
- Case Date/Time ***: [07/10/2022] [09:00]
- Contact Received By ***: [Scott Simpson] [X] [Q]
- Contact Reason ***: [A - Adult Safeguarding] [X] [Q]
- Presenting Priority**: [Empty text field]
- Initial Contact**: [Empty text field]
- Additional Information**: [Empty text area]
- Date/Time Contact Received ***: [06/10/2022] [11:00]
- 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	Created
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scot
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

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 [x] [Q]

Case Priority [input] [Q]

Responsible User [input] [Q]

Responsible Team *
AMHP Coordinator [input] [Q]

Review Date [calendar icon]

Last Assigned to Team Date
20/09/2022 [calendar icon]

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 highlights this field with a '1' in a red circle. A magnifying glass icon to the right of the field is also highlighted with a red box and a '2' in a red circle. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team' (set to 'AMHP Coordinator'), 'Review Date', and 'Last Assigned to Team Date' (20/09/2022).

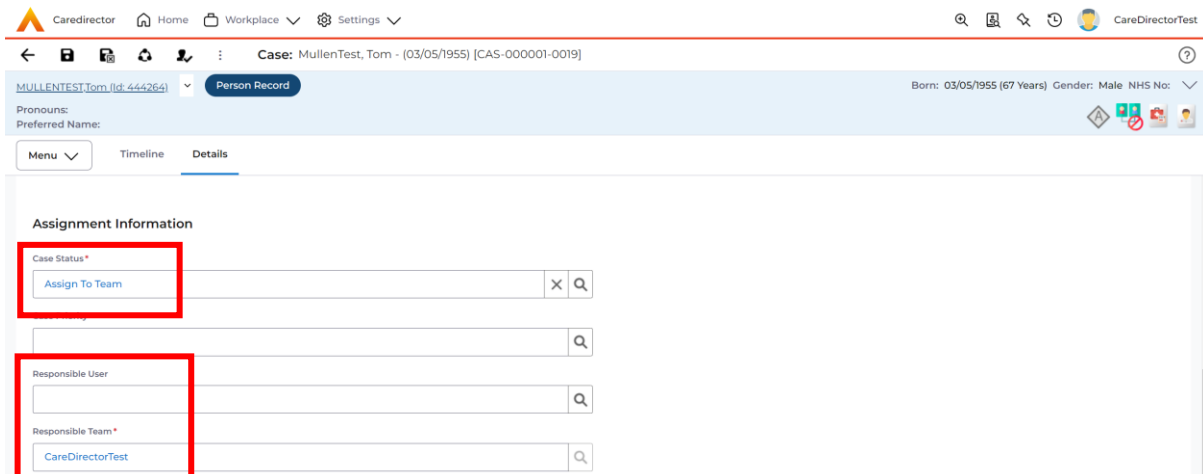
2. Choose the relevant option and select **OK** when found. Select **Save**.

The screenshot shows the 'Case Statuses' lookup dialog box. The dialog box is titled 'Case Statuses Enter your search criteria.' and has a 'Look in' dropdown set to 'Social Care Case Status Lookup View'. The 'Search' field contains 'Search for records'. A table of case status options is displayed, with the first row highlighted by a red box and a '1' in a red circle. The 'OK' button at the bottom right of the dialog box is highlighted with a red box and a '2' in a red circle. The background shows the 'Person Record' page for 'MULLENTEST Tom (Id: 444264)'.

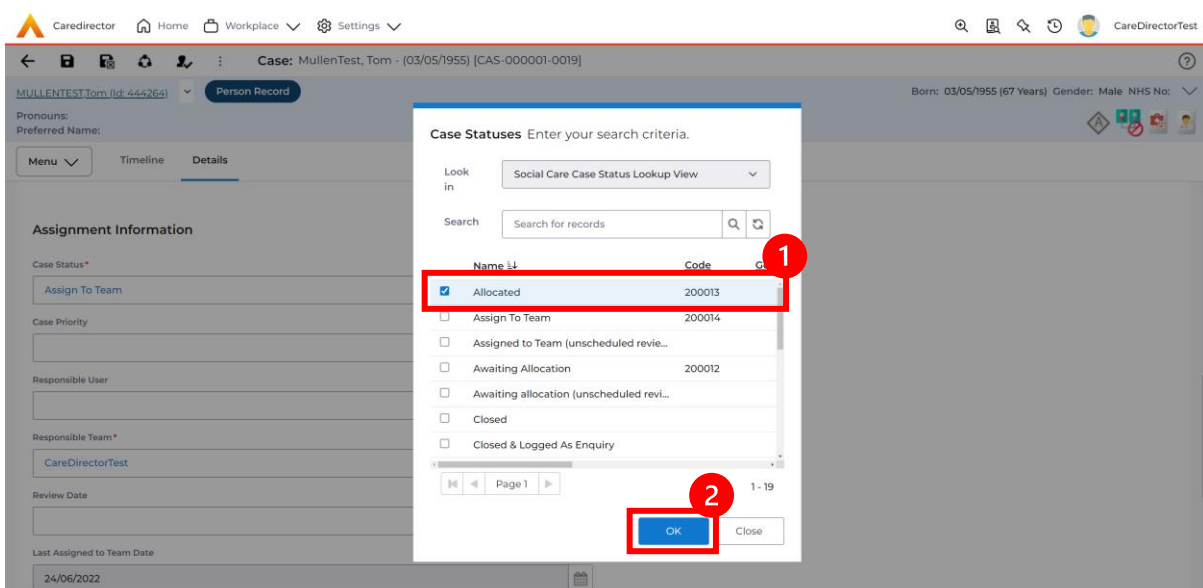
<input type="checkbox"/>	Name	Code	Gov C
<input type="checkbox"/>	Allocated	200013	
<input type="checkbox"/>	Assign To Team	200014	
<input type="checkbox"/>	Assigned to Team (unscheduled revie...		
<input type="checkbox"/>	Awaiting Allocation	200012	
<input type="checkbox"/>	Awaiting allocation (unscheduled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

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*

🔍

System Users Enter your search criteria. 1

Look in: My Business Unit Users

Search: System Views

CareLiveFD Wakefield CareDirectorTest
 CareLiveInstall CareWo... CareDirectorTest
 CareLiveInternal Wak... CareDirectorTest 2
 CareLiveMigration Wa... CareDirectorTest
 CareLivePlugin Wakefie... CareDirectorTest
 CareLivePowerusr Wak... CareDirectorTest
 CareTestIFD Account CareDirectorTest

Page 1 1-46

3 OK Close

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

1 🔍

Assignment Information

Case Status* Allocated X 🔍

Case Priority 🔍

Responsible User* Scott Simpson X 🔍

Responsible Team* CareDirectorTest 🔍

Review Date 📅

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:

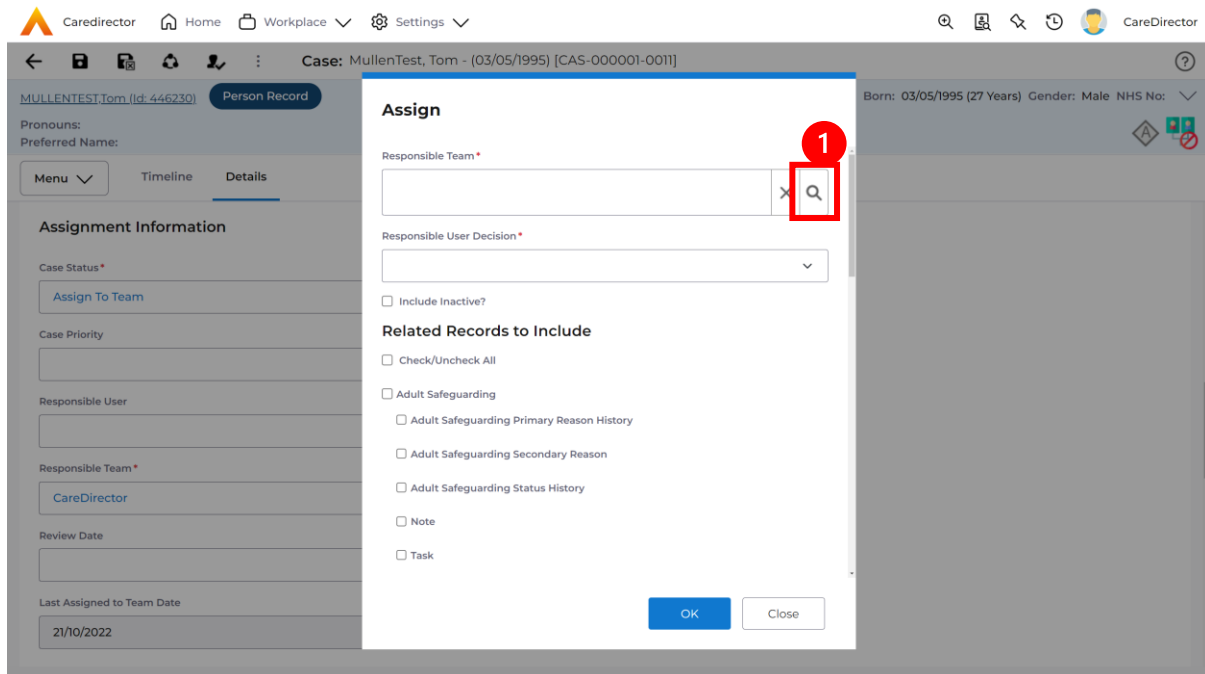
- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights the dropdown, and a '1' in a red circle is next to it.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A text input field containing 'Scott Simpson'. A red box highlights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

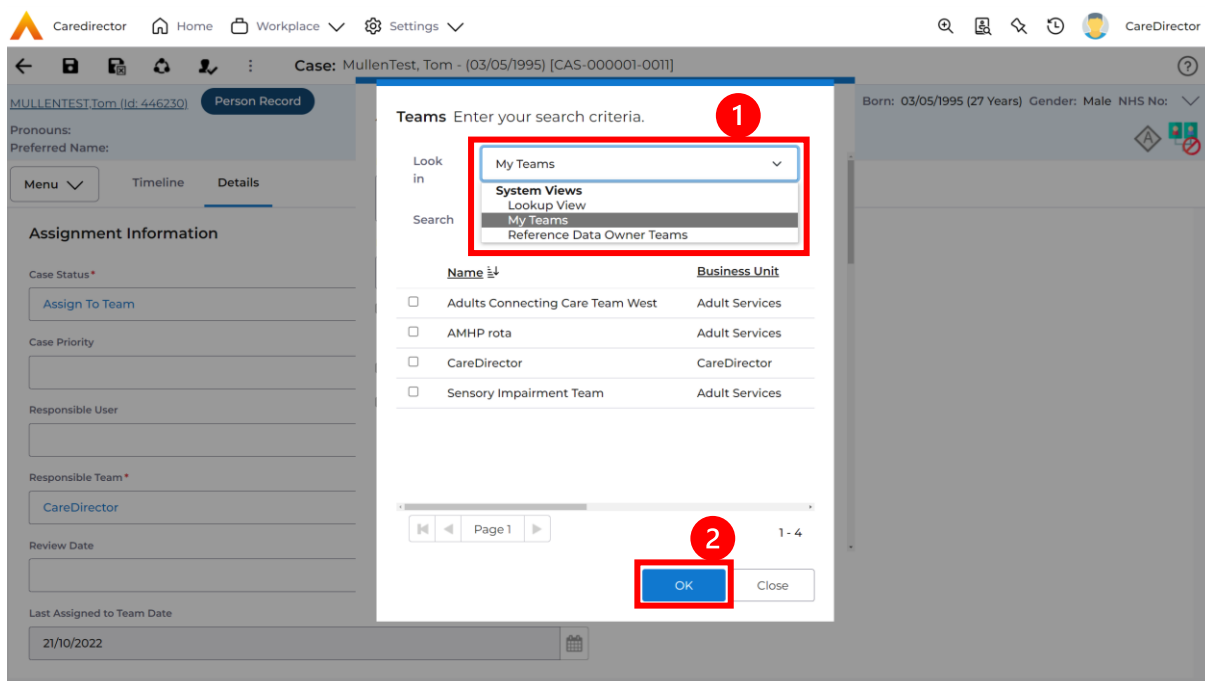
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- Case Status ***: A dropdown menu showing 'Assign To Team'. A red box highlights the dropdown, and a '1' in a red circle is 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 the field, and a '2' in a red circle is next to it.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker icon.

- 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 responsible team and user for a case. The case name is 'MullenTest, Tom - (03/05/1995) [CAS-000001-0011]'. The modal contains the following fields and options:

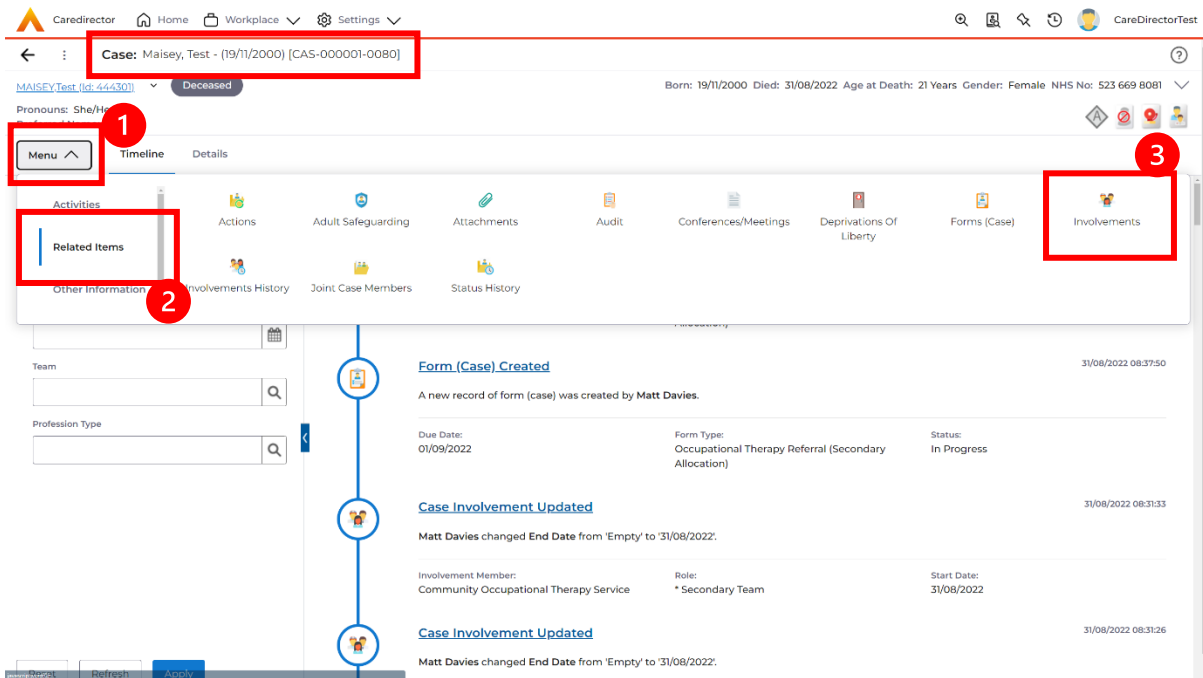
- Responsible Team ***: A dropdown menu with 'Sensory Impairment Team' selected.
- Responsible User Decision ***: A dropdown menu with 'Do not change' selected. This field is highlighted with a red box.
- Include Inactive?**: A checkbox that is currently unchecked.
- Related Records to Include**: A list 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.

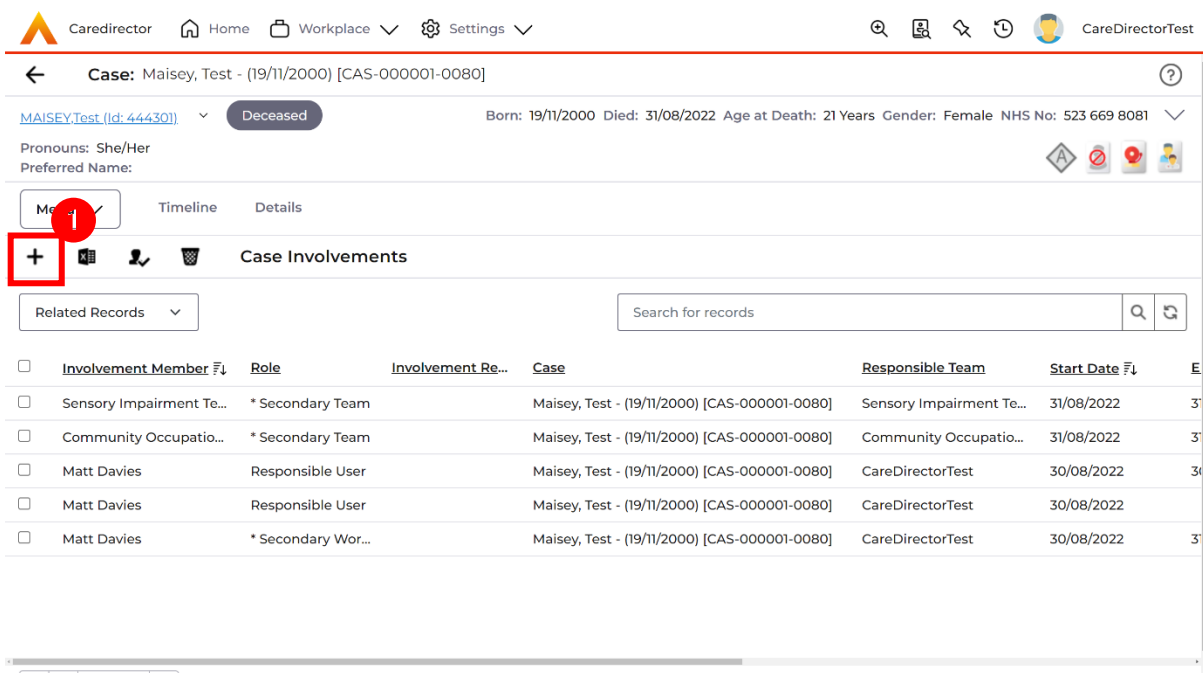
- When finished, select **OK**. It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

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.



- 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' and the 'Involvement Member' field displays 'Peter King'.

How to clone a Case

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]'. Below this, there is a dropdown menu for 'TOM,TEST (id:444267)' and a 'Person Record' button. The 'Details' tab is selected and highlighted with a red box. The 'Contact Details' section contains the following information:

- Case No*: CAS-000001-0010
- Person*: TEST Tom
- Case Date/Time*: 21/06/2022 07:00
- Contact Received By*: Scott Simpson
- Contact Reason*: A - Adult Safeguarding

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

The screenshot shows the CareDirector interface with the 'Details' tab selected. A red box highlights the 'Three Dots' menu icon in the toolbar. A dropdown menu is open, showing various actions. The 'Clone' option is highlighted with a red box and circled with a red circle containing the number '2'. The case information is the same as in the previous screenshot.

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.

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]

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 Timeline Details

+ [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 currently populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' button in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'. The top navigation bar includes links for Home, Workplace, and Settings, along with a user profile for 'CareDirectorTest'.

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 form with the following fields:

- Case***: MullenTest, Tom - (03/05/1955) [CAS-000001-0002]
- Responsible Team***: CareDirectorTest
- Form Type***: Adult - Change to Service Request
- Responsible User**: Scott Simpson
- Status***: Complete (dropdown menu is open, showing options: Complete, Not Started, In Progress, Closed, Cancelled, Approved)
- Due Date**: 23/06/2022
- Review Date**: (empty)

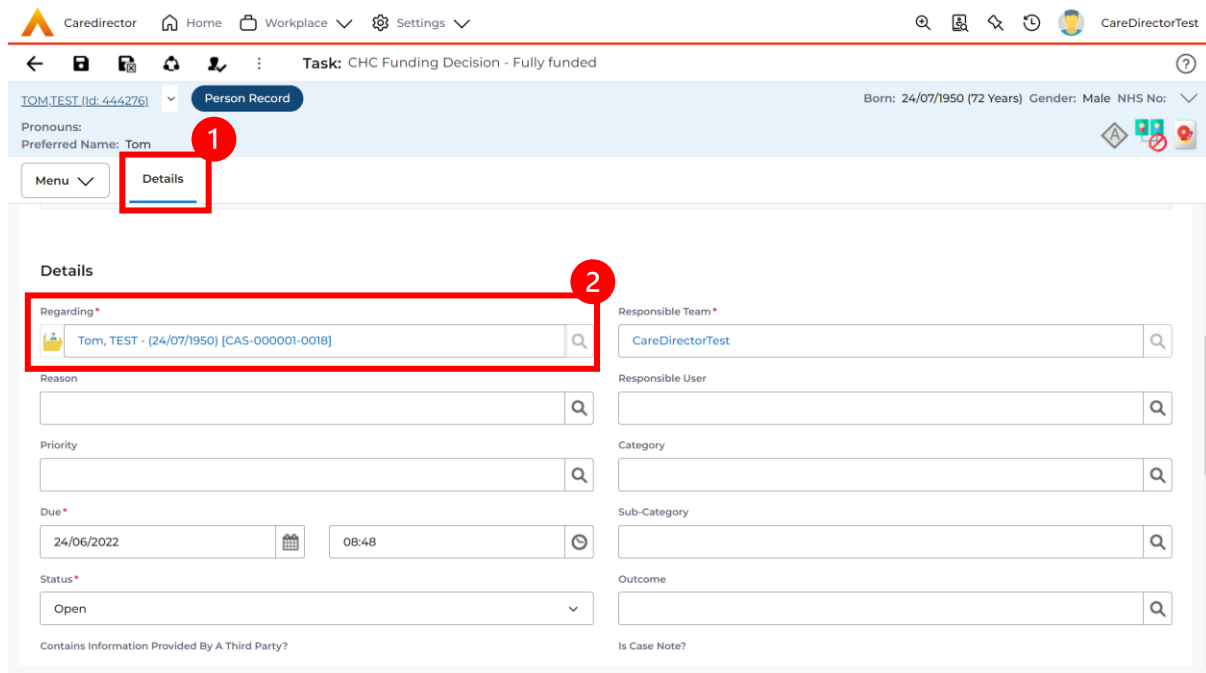
3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

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 form with the following fields:

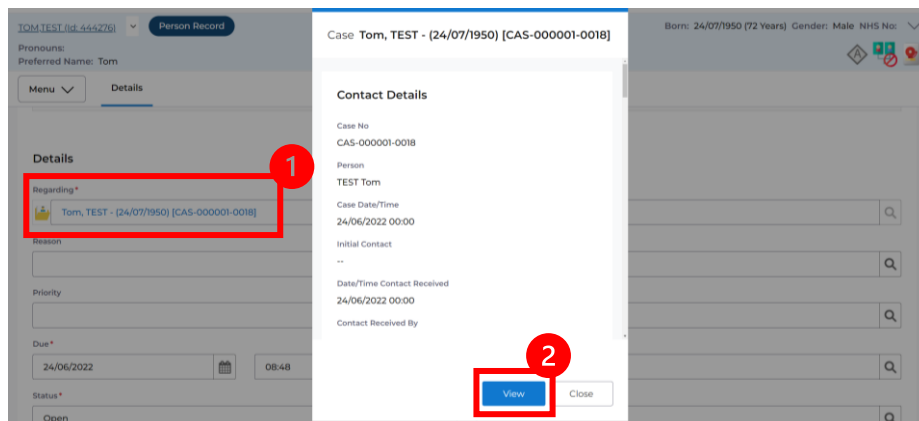
- Subject***: Test Task for Case
- Description**: (Rich text editor with toolbar and content 'Test')

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]), 'Responsible User' (Scott Simpson), 'Priority', 'Due', 'Status' (Open), '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 modal open. The modal has three red annotations: 1. 'Enter your search criteria.' 2. The 'My Teams' option in the 'Look in' dropdown. 3. The 'OK' button at the bottom of the modal. The modal lists teams under 'Name' and 'Business Unit' columns:

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'. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'MULLENTEST > [id: 446230] > Person Record'. The record details include: '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]), 'Reason', 'Priority', 'Due*', 'Status*' (Open), 'Responsible Team*' (Sensory Impairment Team), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'. There are two radio button options at the bottom: 'Contains Information Provided By A Third Party?' (Yes/No) and 'Is Case Note?' (Yes/No). Red annotations highlight the 'X' icon in the 'Responsible User' field (labeled '2') and the 'X' icon in the 'Responsible Team' field (labeled '1').

How to Allocate an existing Activity to another team

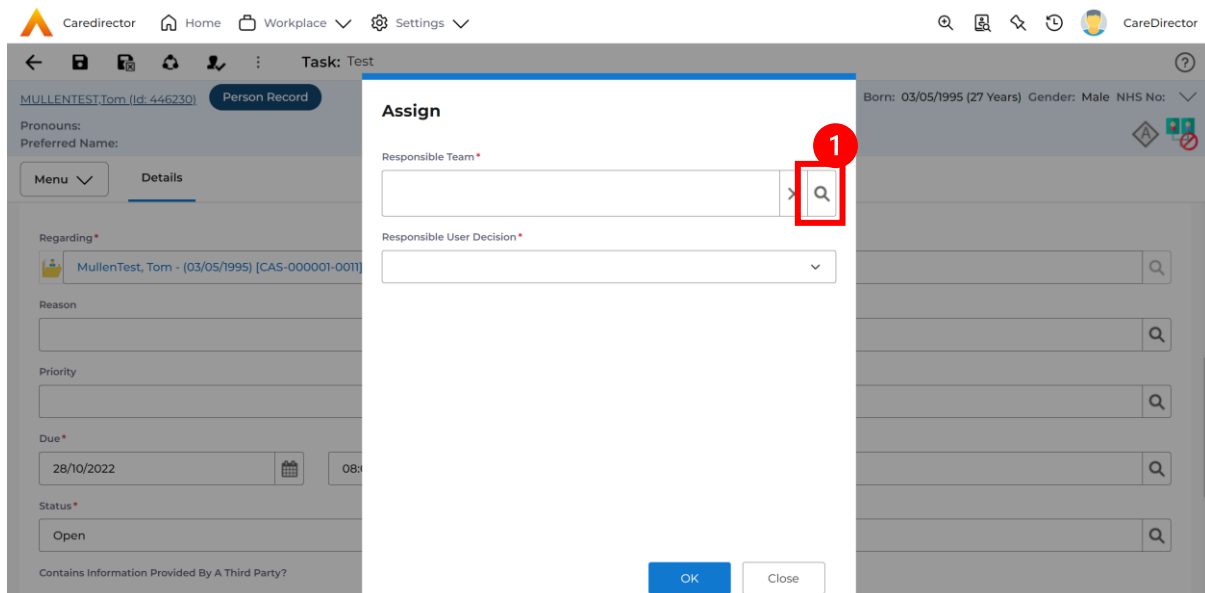
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The task is titled 'Task: Test' and is associated with the person record 'MULLENTEST, Tom (id: 446230)'. The 'Responsible Team' is 'Sensory Impairment Team' and the 'Responsible User' is 'Scott Simpson'. A red box highlights the 'X' button next to the user name, with a red circle containing the number '1' next to it. Other fields include 'Reason', 'Priority', 'Due' (28/10/2022), and 'Status' (Open).

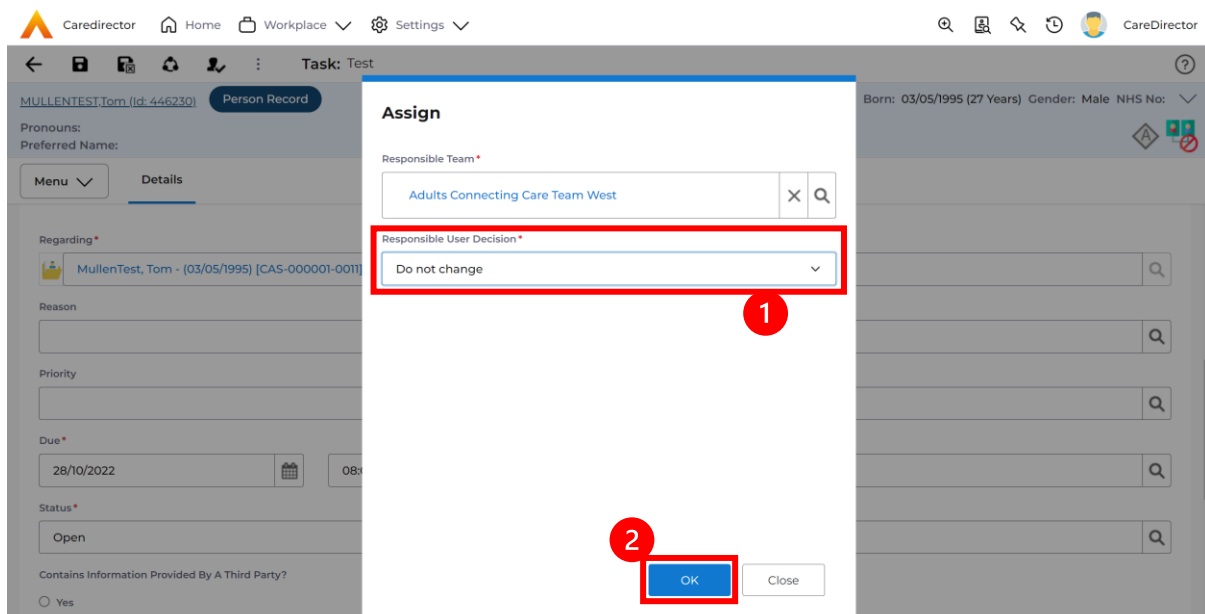
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same CareDirector interface as above, but with the 'Assign' icon in the toolbar highlighted by a red box and a red circle containing the number '1'. The 'Responsible User' field is now empty, indicating that the user has been removed from the record.

- 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.



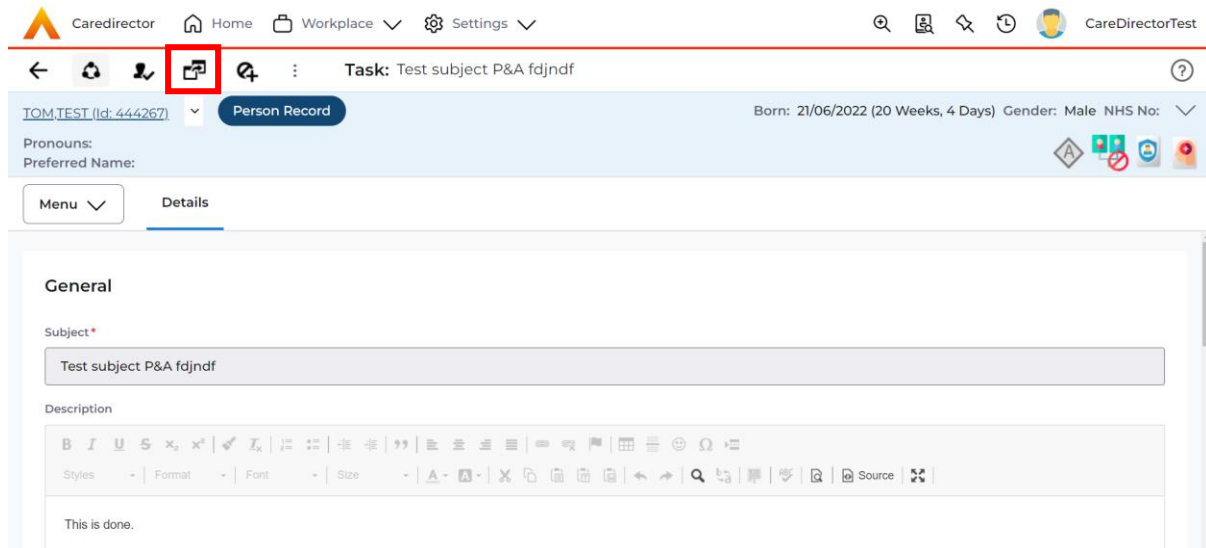
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



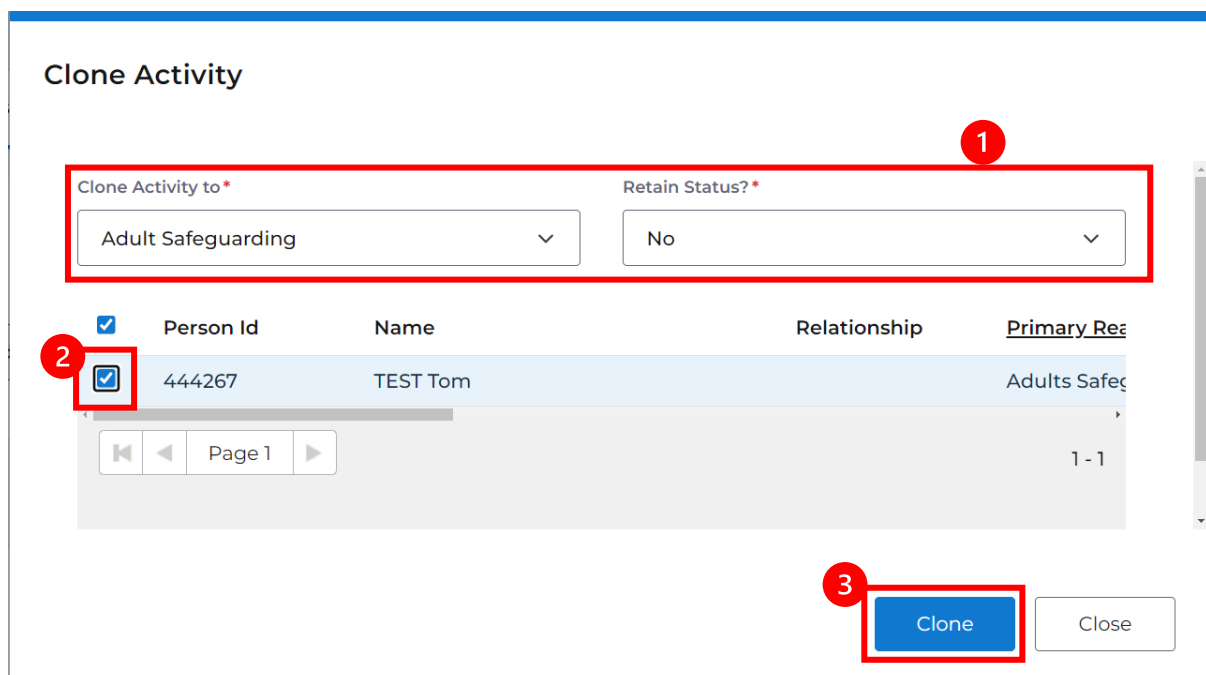
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

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**.

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail is 'Person: TEST Tom'. The main navigation menu is open, and 'Related Items' is selected. The 'Attachments' option is highlighted in the main content area.

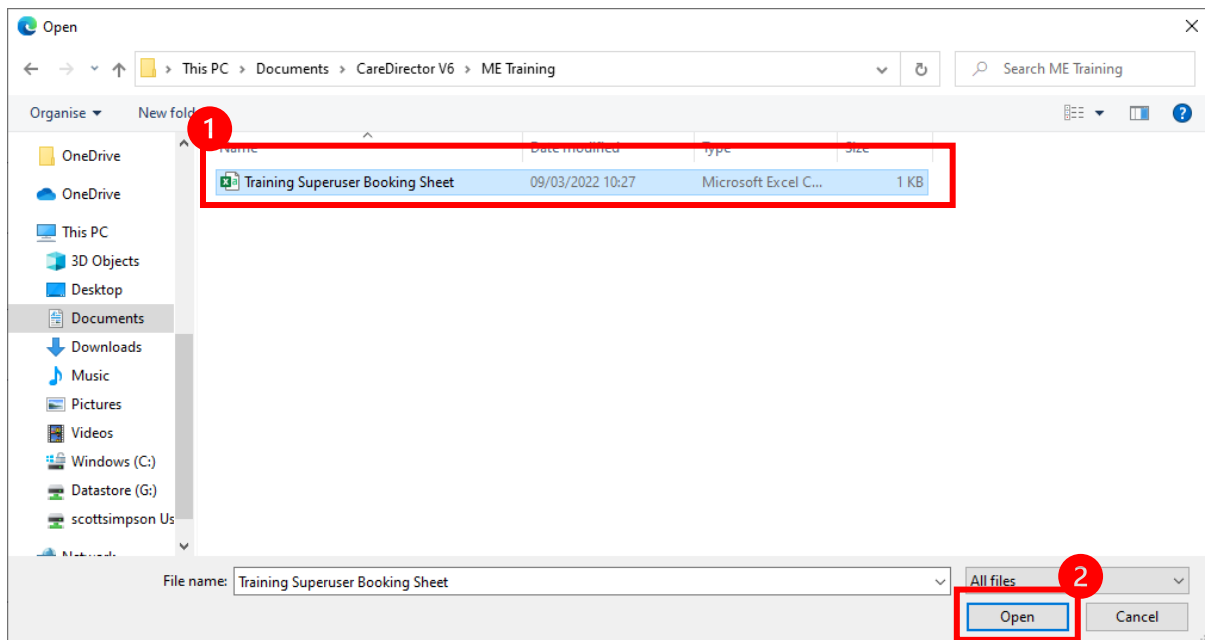
2. When opened, select the **Create New Record** from the toolbar.

The screenshot shows the 'Attachments (For Person)' screen. The toolbar at the top contains a '+ Create New Record' button, which is highlighted with a red box and the number 1. Below the toolbar is a search bar and a table with columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is currently empty, displaying a 'NO RECORDS' message.

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', indicating the 'Browse' button. Other fields include 'Person' (TEST Tom), 'Responsible Team' (CareDirectorTest), 'Title' (Test Document Upload), 'Date' (04/10/2022), 'Document Type' (Clients), and 'Cloning Information' (Is Cloned? No).

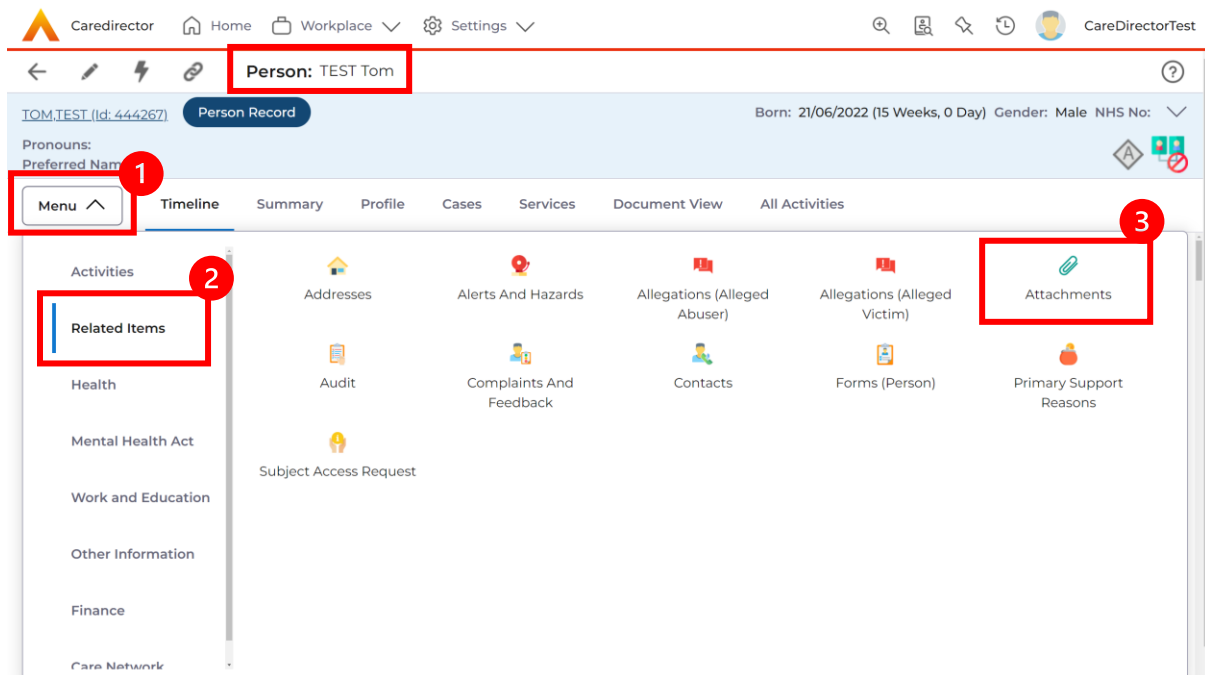
4. Select a **File** from your computer/ SharePoint and select **Open**.



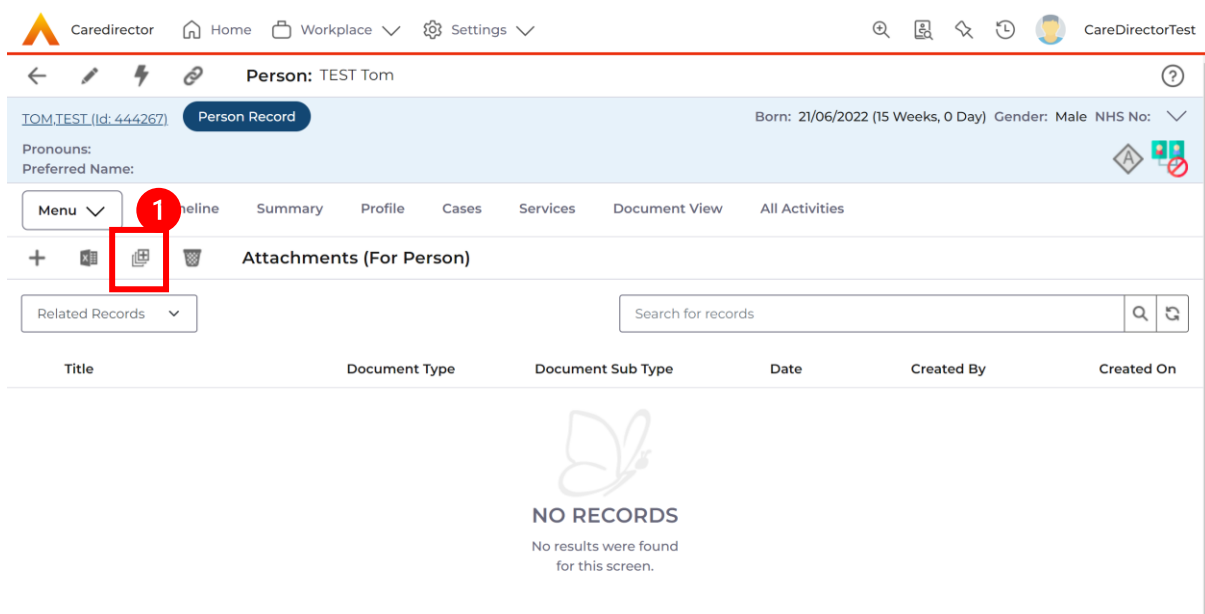
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

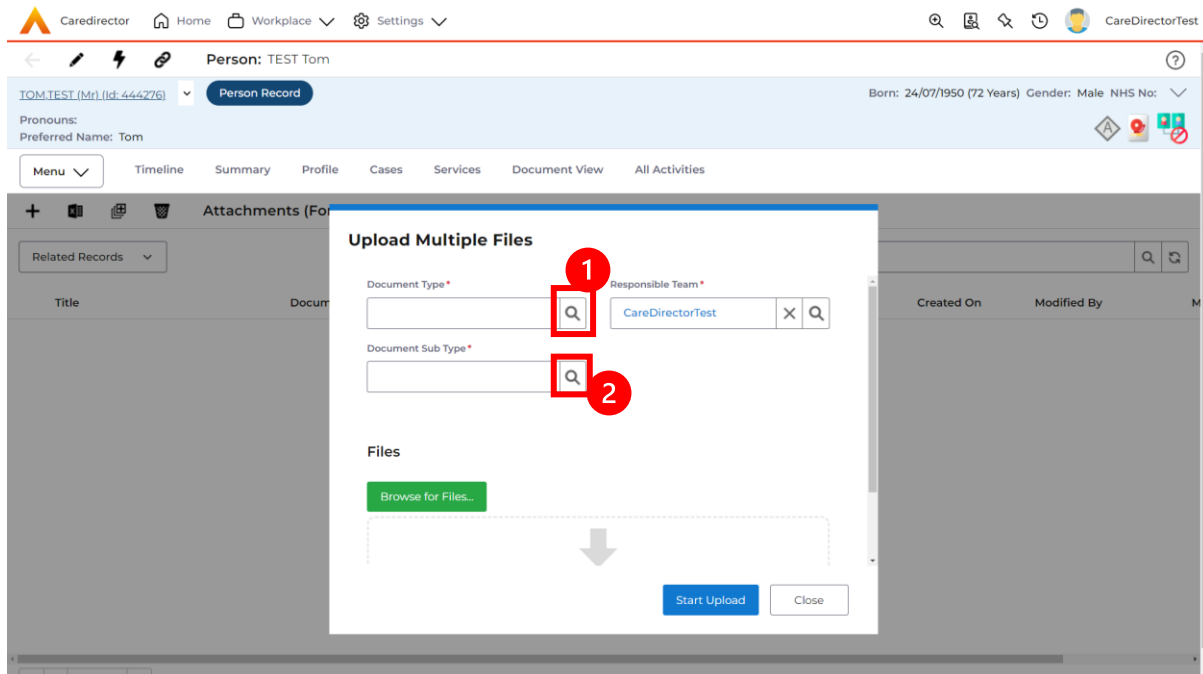
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



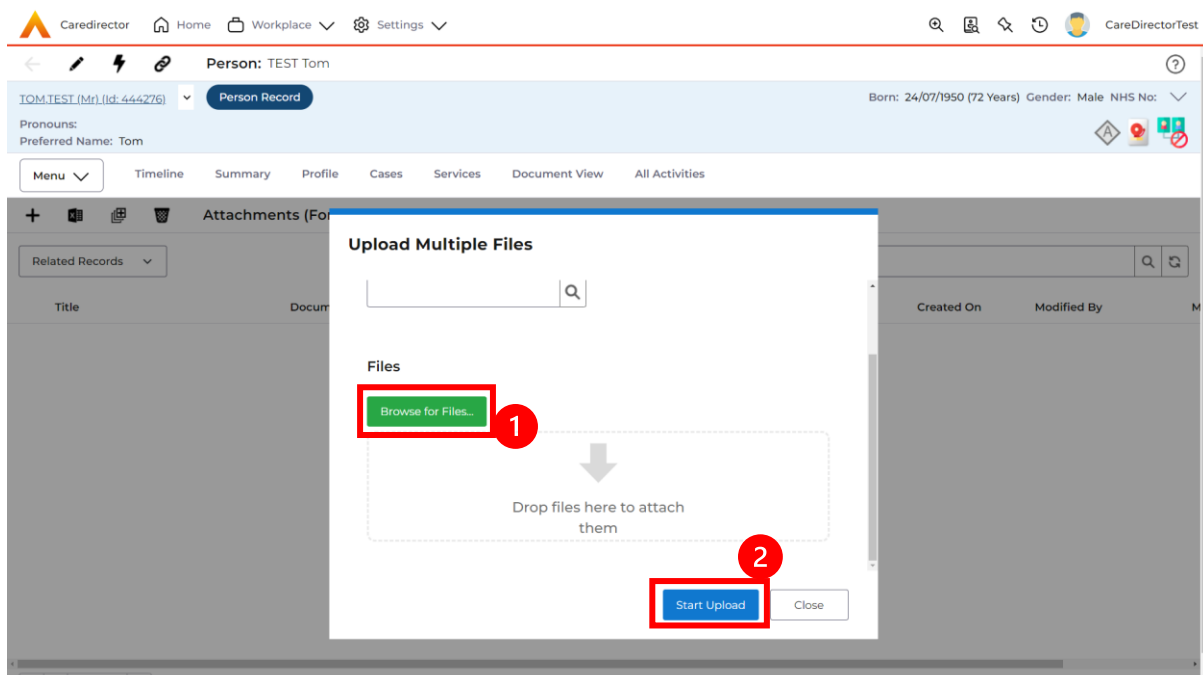
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 main navigation menu is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. The timeline on the right shows three events: 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

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 main navigation menu is open, and 'Forms (Case)' is selected. The 'Related Records' section shows a table of records:

<input type="checkbox"/>	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			

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
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. 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

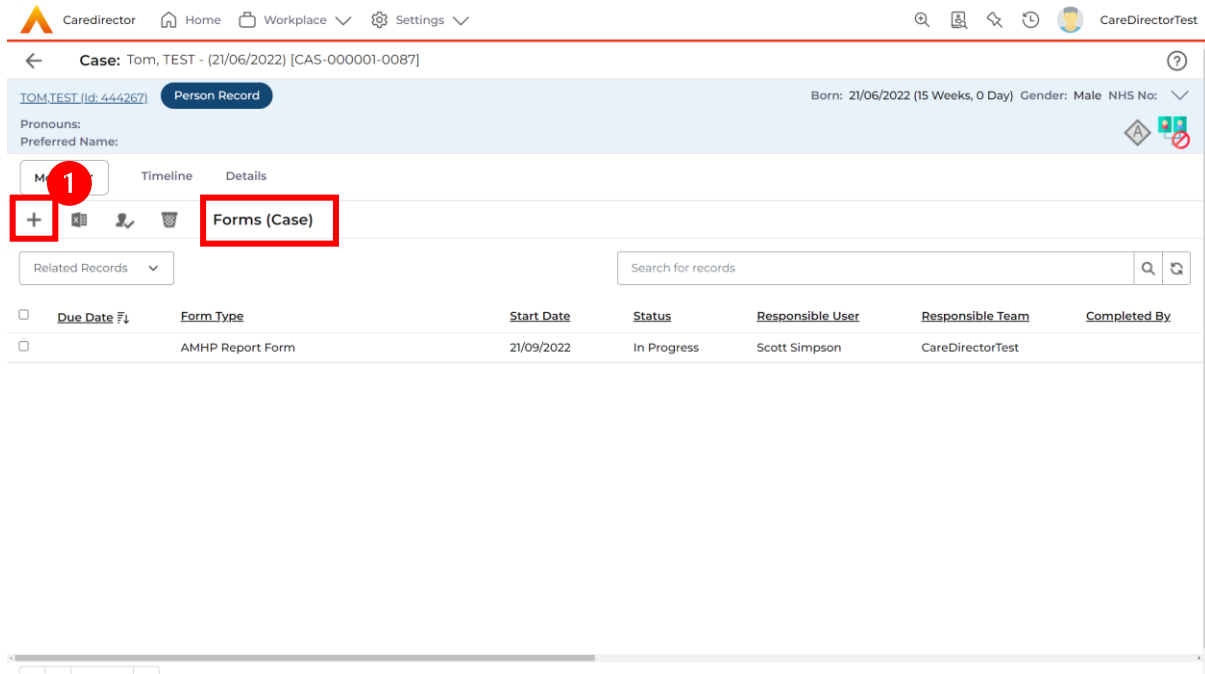
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

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

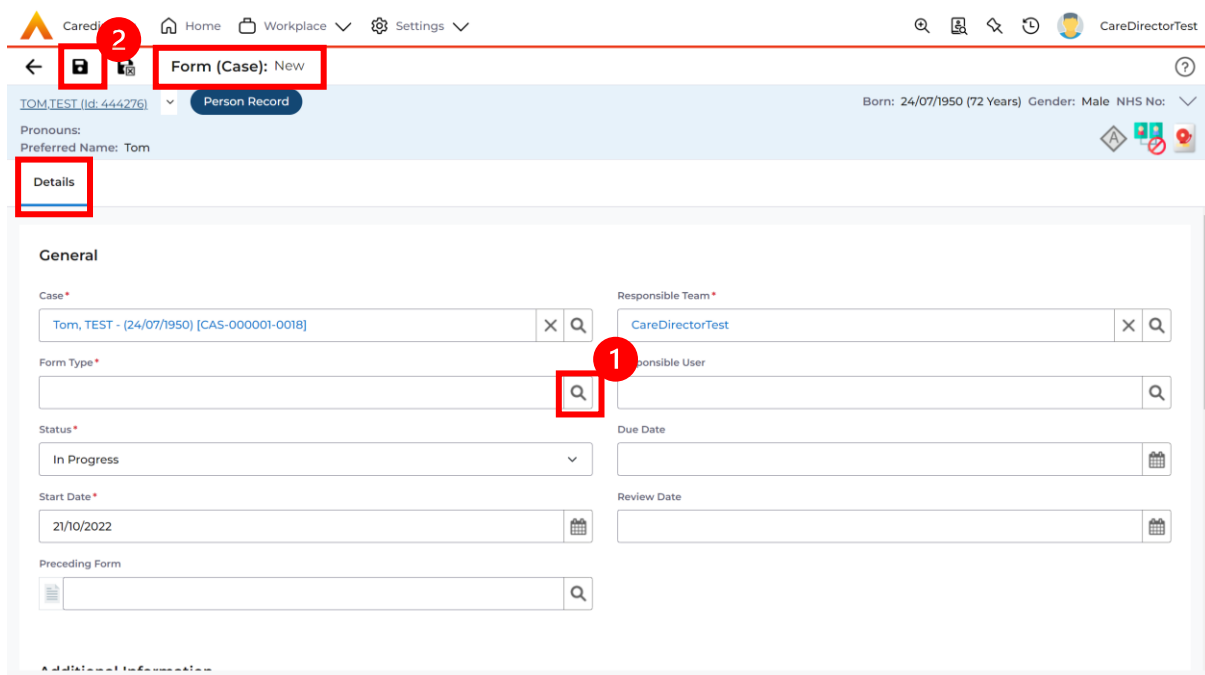
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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.

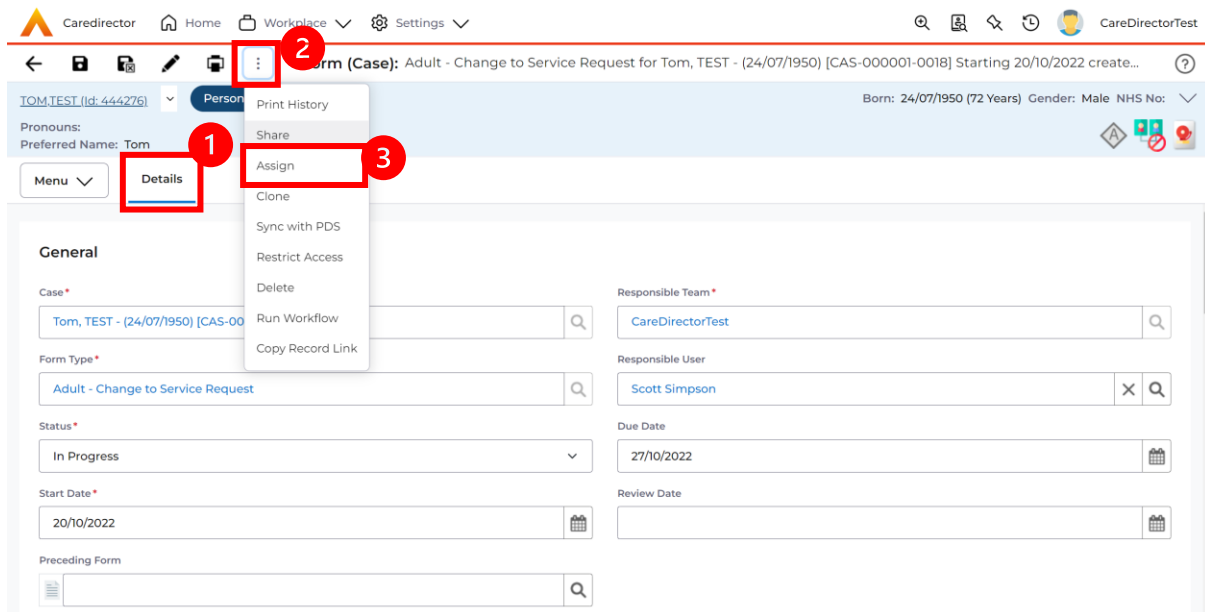
The screenshot shows the CareDirector interface for a specific case. The toolbar at the top contains several icons, with the 'Edit' icon (a pencil) highlighted by a red circle and the number '1'. Below the toolbar, the case details are displayed, including the case name 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]' and the user 'Scott Simpson'. 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**.

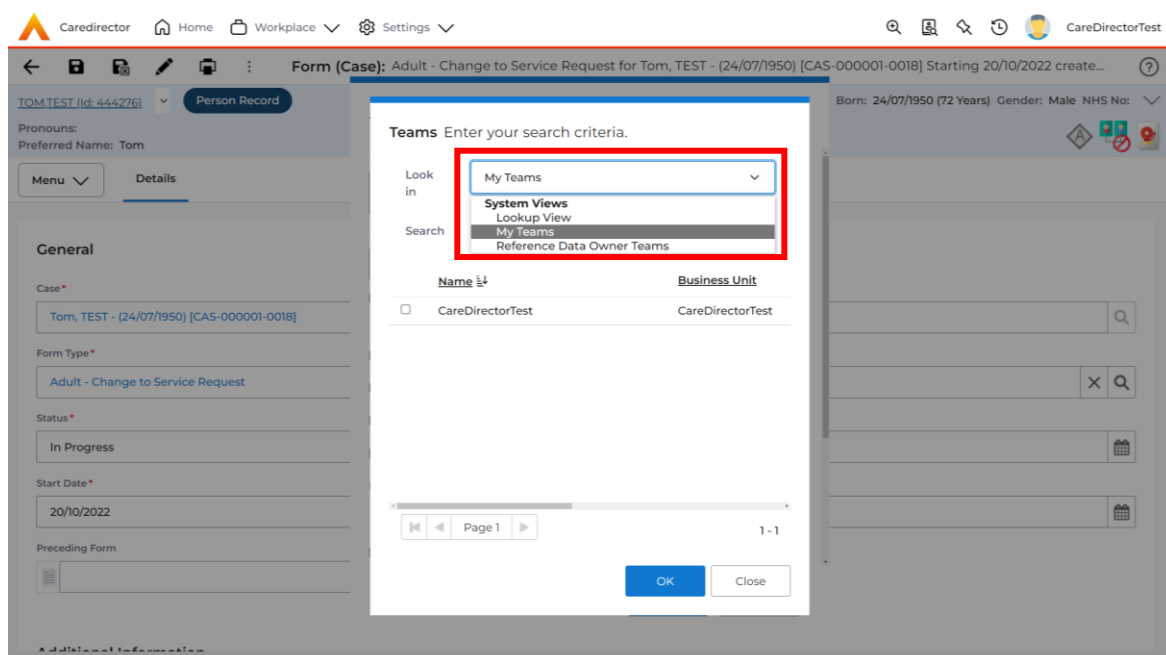
The screenshot shows the CareDirector interface for the 'AMHP Report Form'. The toolbar at the top contains several icons, with the 'Save' icon (a floppy disk) highlighted by a red circle and the number '1'. Below the toolbar, the case details are displayed, including the case name 'AMHP Report Form' and the user 'Scott Simpson'. 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 a list of options with radio buttons: '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 ***: A search box containing 'Accommodation Team'.
- Responsible User Decision ***: A dropdown menu with 'Clear on current record only' selected.
- Include Inactive?**: An unchecked checkbox.
- 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)**.

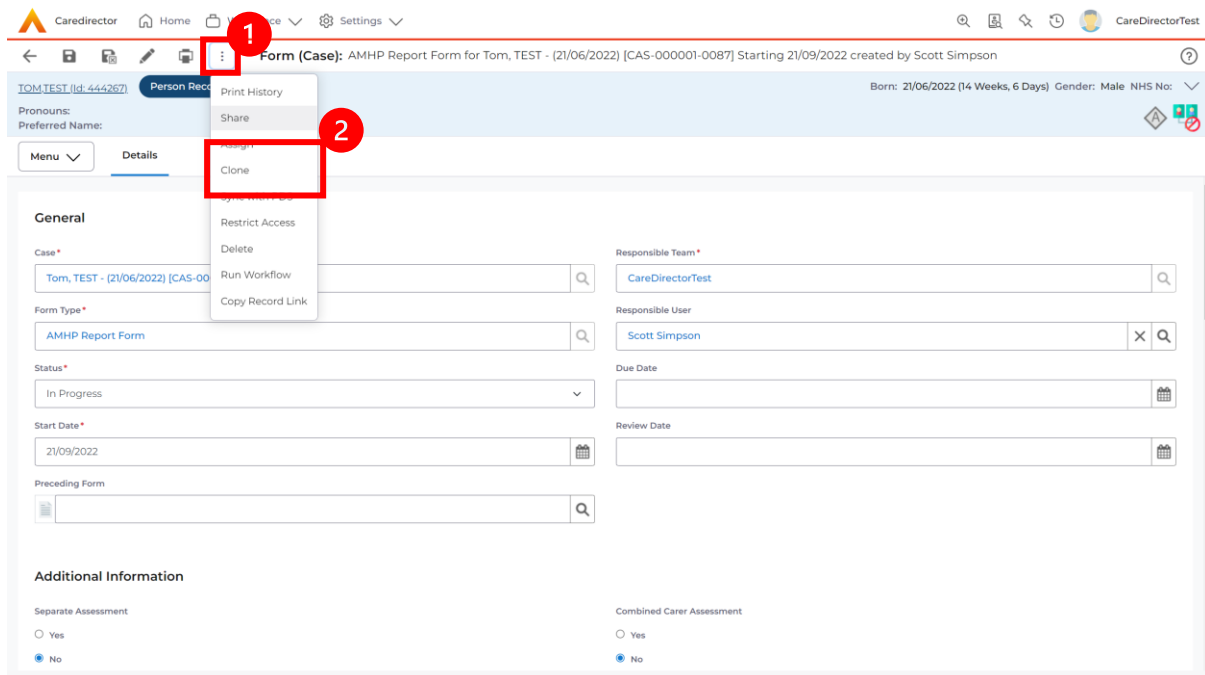
The screenshot shows the CareDirector interface for a case record. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box. Below it, the 'Menu' dropdown is open, and 'Related Items' is selected, also highlighted with a red box. In the 'Related Items' sub-menu, 'Forms (Case)' is highlighted with a red box. The main content area shows a timeline of events, including 'Form (Case) Created' on 21/09/2022 at 13:04:25.

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

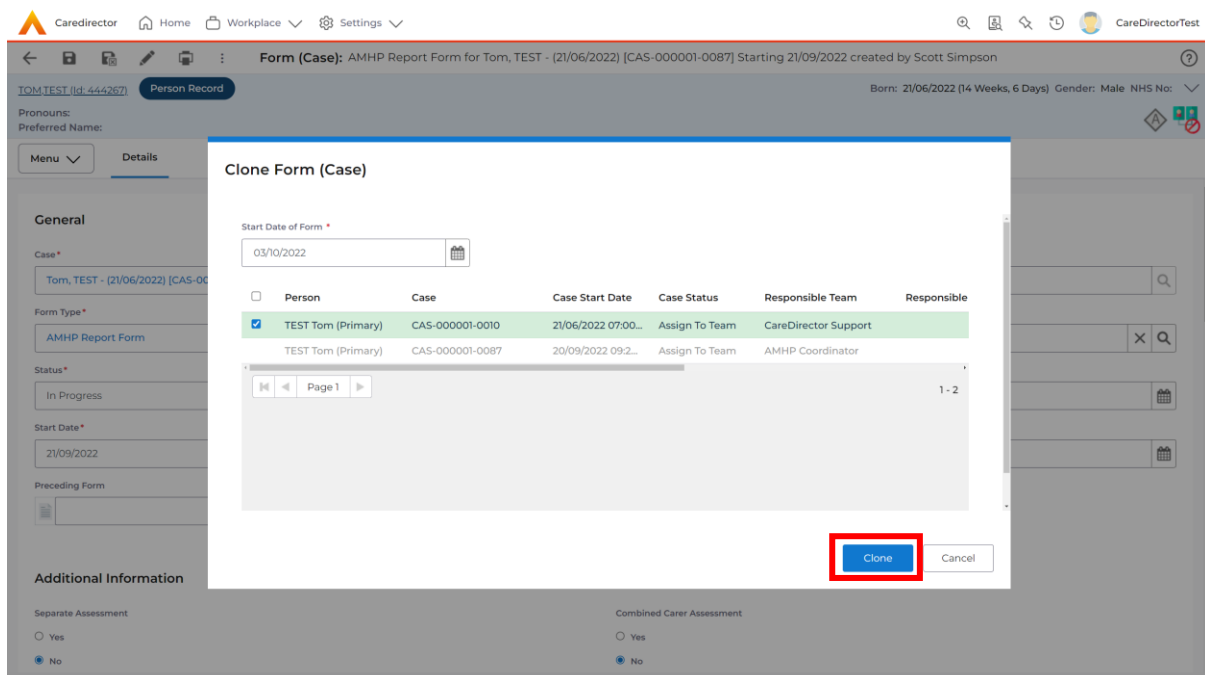
The screenshot shows the 'Forms (Case)' sub-menu open. Below it, a table of related records is displayed. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The first row is highlighted.

Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date
	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 web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the current form: 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. Below this, a user profile for 'TOM TEST (id: 444267)' is shown with a 'Person Record' button and personal details: 'Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:'. A 'Menu' dropdown and 'Details' tab are visible.

The main content area is titled 'General' and contains the following fields:

- 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)

The 'Completion Details' section includes:

- 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.

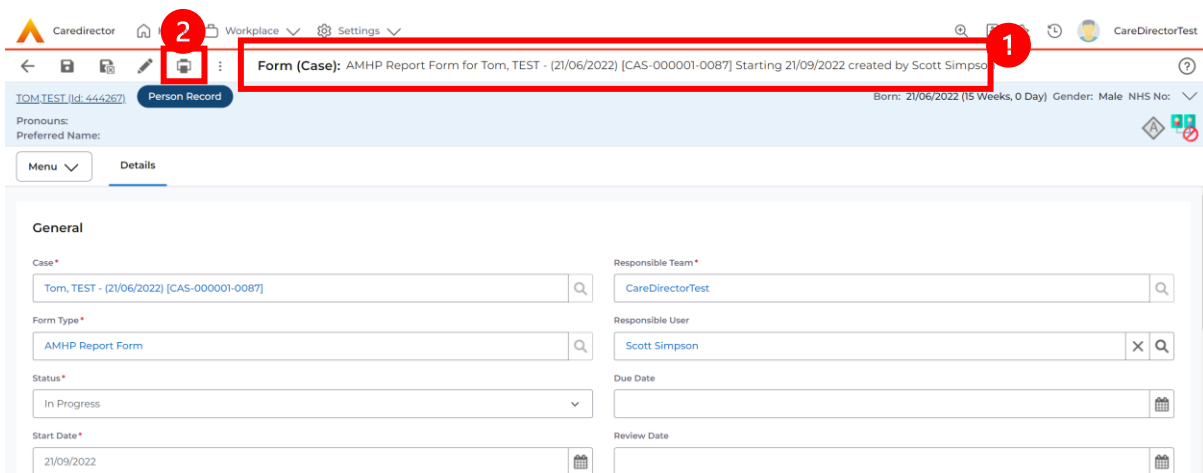
The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area shows the form details for 'Tom, TEST (id: 444267)'. The form is currently in a 'Closed' status. The 'Form Type' is 'Occupational Therapy Conversation Record'. Other fields 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**.

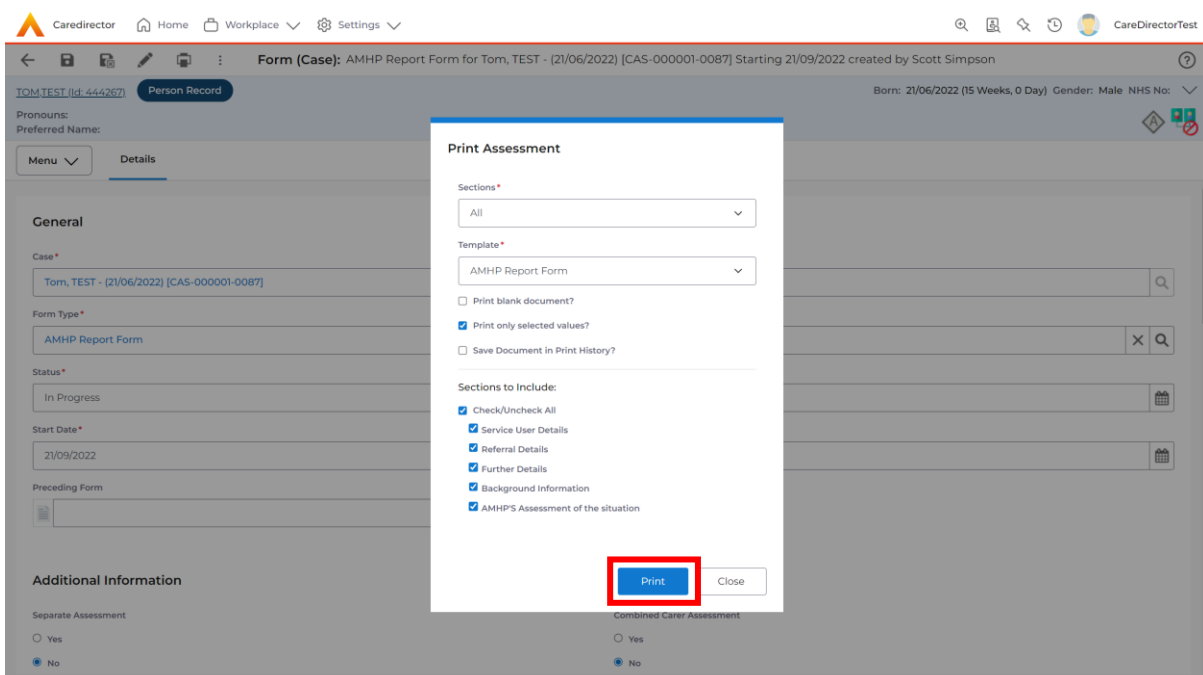
This screenshot shows the same form as the previous one, but with the three-dot menu icon highlighted by a red circle with the number '1'. The dropdown menu is open, showing options: 'Share', 'Assign', 'Clone', 'Restrict Access', 'Activate', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Activate'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

How to Print

1. Printing in CareDirector will work the same everywhere on the system as it requires the **Print** function from the toolbar to be selected.
2. Locate the **Activity/ Attachment/ Form** that is required to be printed. Then select the **Print** function from the toolbar.



3. This will open a new window. Select the parameters you want and select **Print**.



4. Please note: Activities will need to be printed from the **Person Record** under the tab **All Activities**

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header displays 'Person: TEST Tom' (highlighted with a red box and 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:'. A menu bar contains 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities' (highlighted with a red box and number 1). The 'All Activities' section is active, showing a search filter (highlighted with a red box and number 2) and a table of activities. The table has columns: 'Regarding', 'Subject', 'Activity', 'Status', 'Start/Due Date', 'Actual End', 'Case note', and 'Regarding Type'. Two activities are listed:

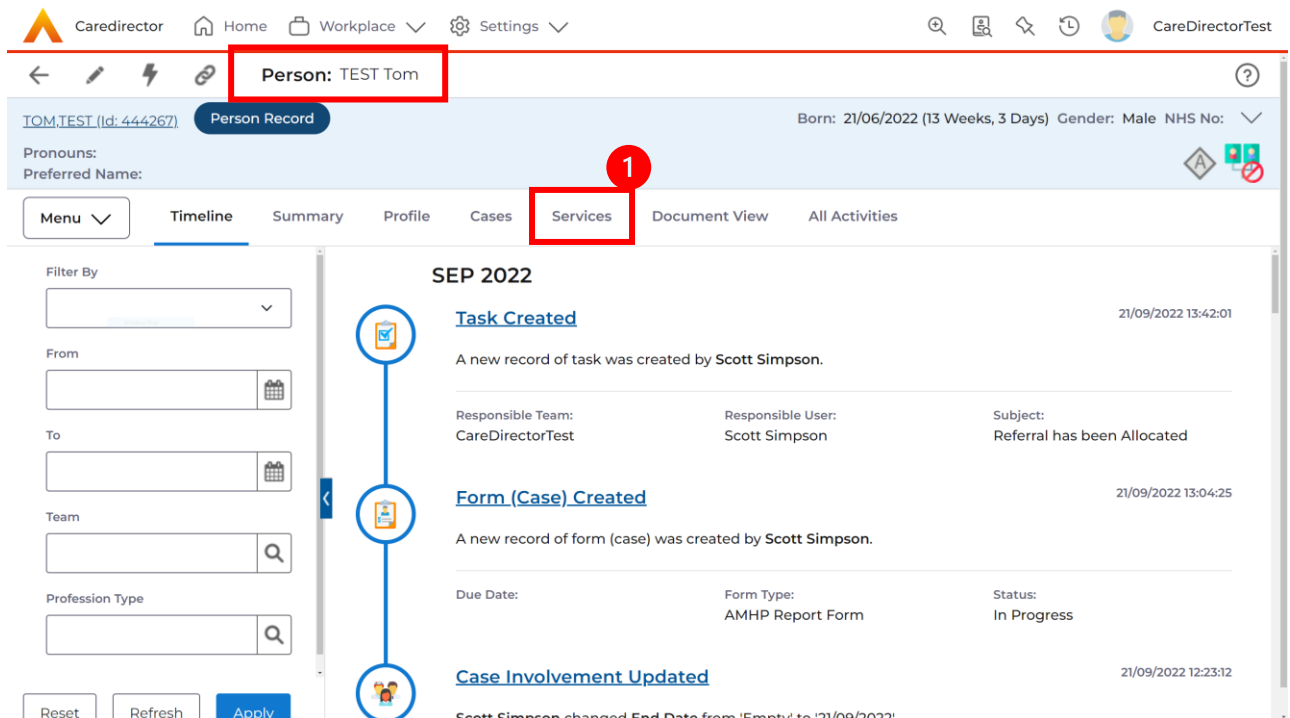
Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case note	Regarding Type
<input checked="" type="checkbox"/>	TEST Tom \ Pers...	PB Cash Direct ...	Task	Open	28/09/2022 00:0...	No	Service Provision
<input type="checkbox"/>	Tom, TEST - (21/0...	Referral has bee...	Task	Open	21/09/2022 15:25...	No	Case

At the bottom of the filter section, there are 'Clear Filters' and 'Search' buttons.

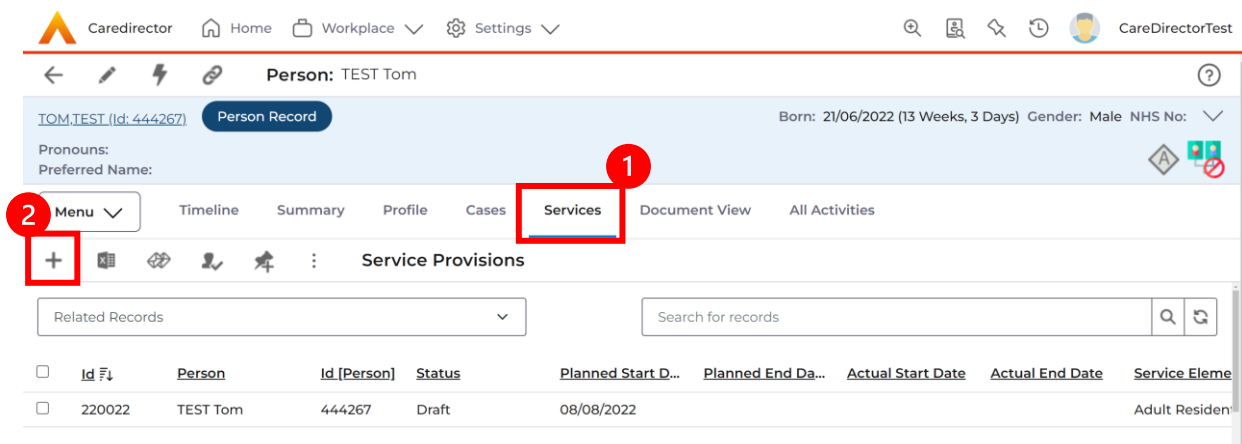
How to input Service Provisions

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**.

Service Provision Statuses Enter your search criteria.

Look in: Lookup Records

Search: Search for records

Name	Code	Gov C
<input type="checkbox"/> Draft	1	
<input type="checkbox"/> Booking Request	20	
<input type="checkbox"/> Validation Required	30	
<input type="checkbox"/> Waiting List	40	
<input type="checkbox"/> Rejected	50	
<input checked="" type="checkbox"/> Ready for Authorisation	60	

Page 1 of 1 - 6

OK Close

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**.

Person: TEST Tom

Person Record

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

Service Provisions

Related Records

Search for records

Id	Person	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1
<input type="checkbox"/> 220015	TEST Tom	24/06/2022				Adult Residential Care
<input checked="" type="checkbox"/> 220012	TEST Tom	24/06/2022				SDS - WMDC Managed Account

Unpin from me

Ready to Authorise

Authorise

Calculate Cost Per Week

Cancel

Update GL Code

Bulk Edit

Delete

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.

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail at the top is highlighted in red: "Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022". The "Service Deliveries" tab is selected and highlighted with a red box and a red circle containing the number "1". The "Create New Record" button (a plus sign in a square) is also highlighted with a red box and a red circle containing the number "2". Below the tabs, there is a search bar for records and a table header with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and Wedr. The table content is empty, displaying "NO RECORDS" with the message "No results were found for this screen."

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**.

Caredirector Home Workplace Settings CD V6 Team

Service Delivery: TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2...

TOM.TEST (Id: 444267) Person Record Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:
 Pronouns: Preferred Name:

Menu Details Variations

General

Service Provision * TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088...	Responsible Team * CareDirectorTest
Id * 188114	Rate Unit * Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time * 09:00	Units * 1.0000
Total Visits * 7	Total Units * 7.0000
Number of Carers * 1	

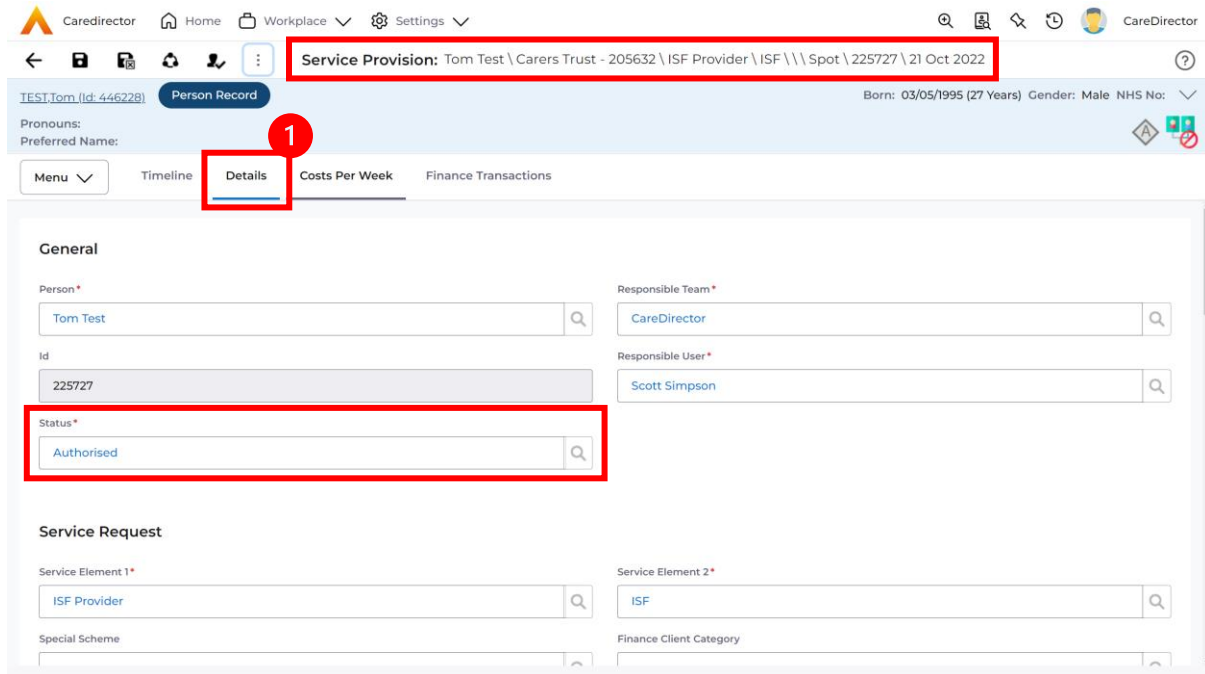
Schedule applies to days

Select All * <input checked="" type="radio"/> Yes <input type="radio"/> No	Thursday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Monday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Friday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Tuesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Saturday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Wednesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Sunday * <input checked="" type="radio"/> Yes <input type="radio"/> No

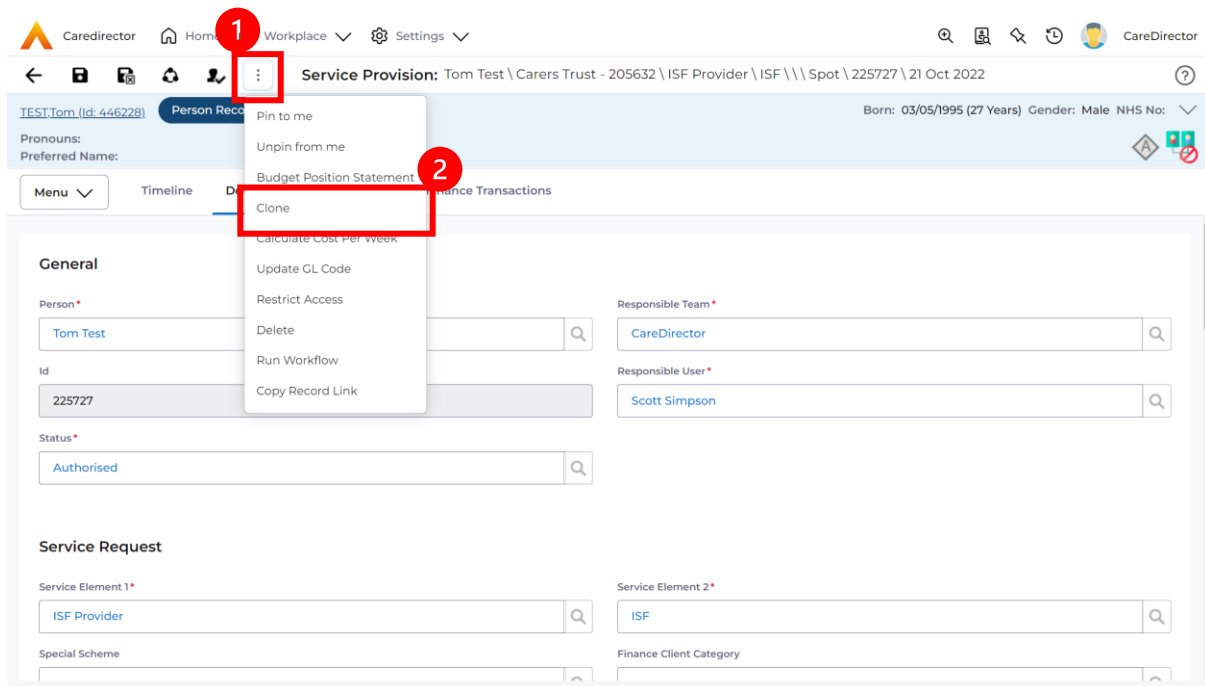
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

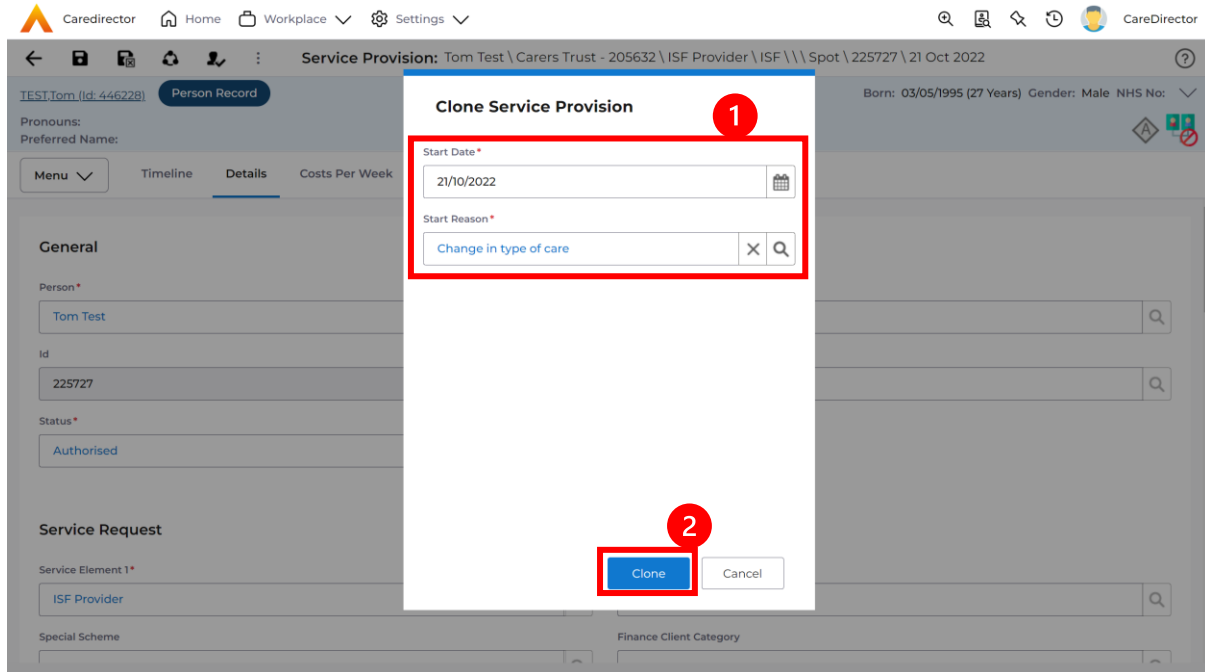
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



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**.

The screenshot shows the CareDirector interface for a service provision. The breadcrumb trail is: Service Provision: TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju... The 'Details' tab is selected. The 'Dates' section contains the following fields:

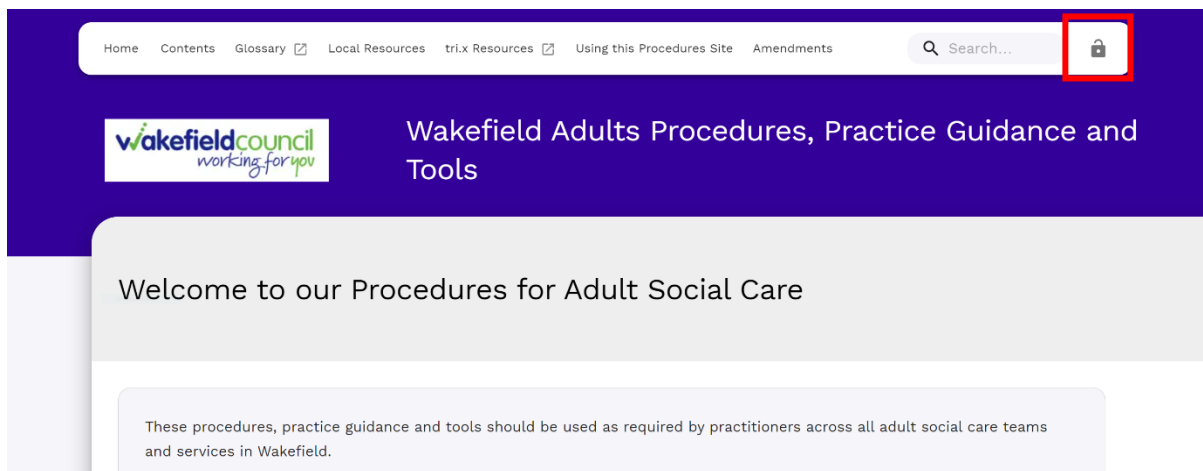
Field	Value
Planned Start Date	24/06/2022
Planned End Date	
Actual Start Date	
Actual End Date	21/10/2022
Start Reason*	New Placement
End Reason*	Carer's Decision

The 'Commissioning' section contains the following fields:

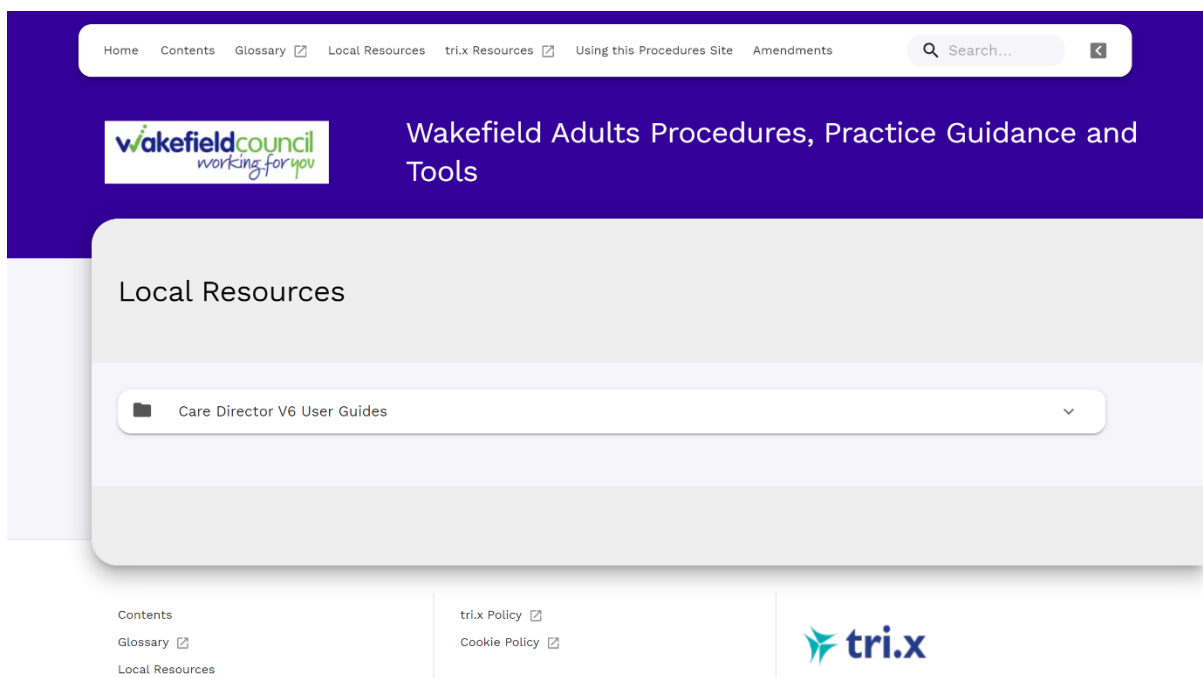
Field	Value
Purchasing Team	Adults Connecting Care Team East
Frequency in Weeks*	1

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	07/10/2022