



Forensic Team V1.0

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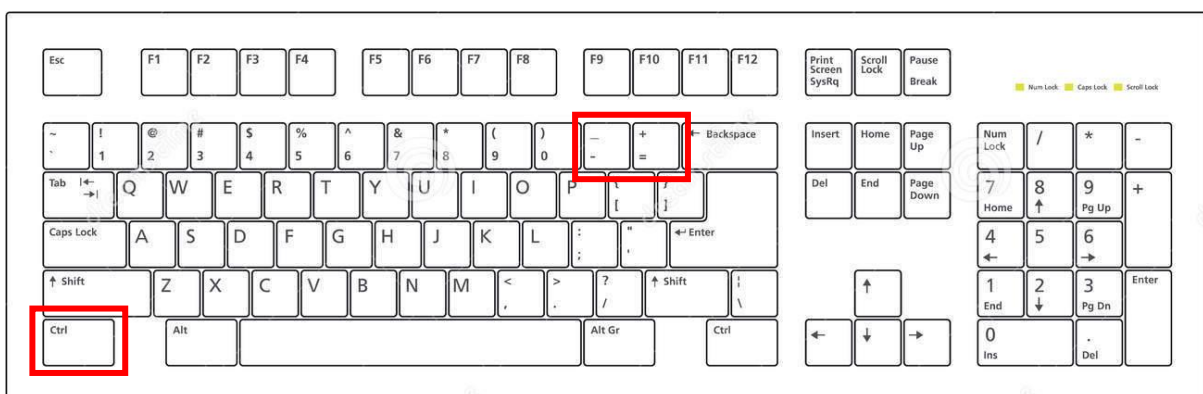
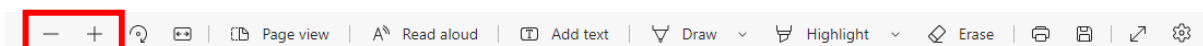
Guide Information

Before Live Access...

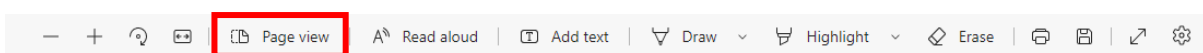
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

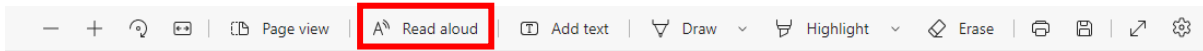
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



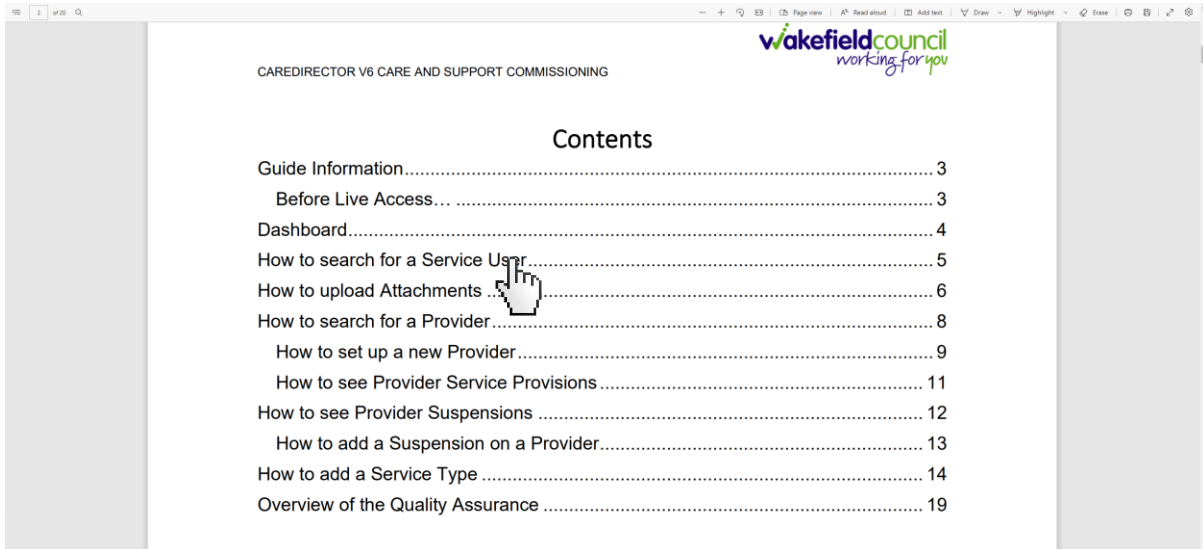
3. To put pages next to one another, select the **Page View** icon on the toolbar.



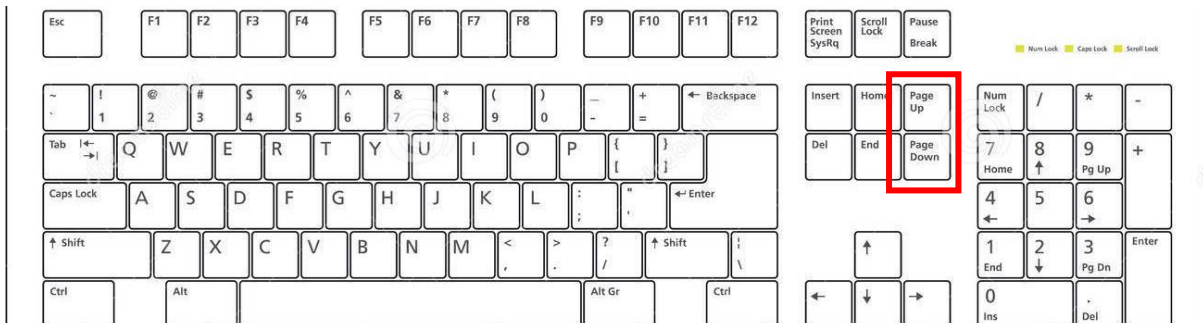
4. For auditory assistance, select **Read Aloud** from the toolbar.



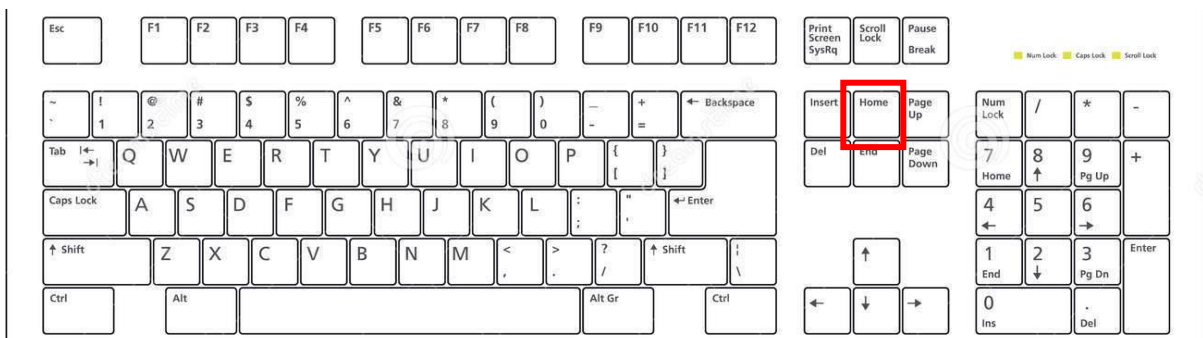
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

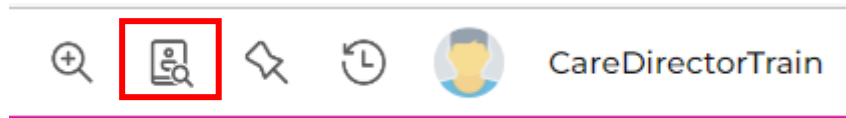


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.

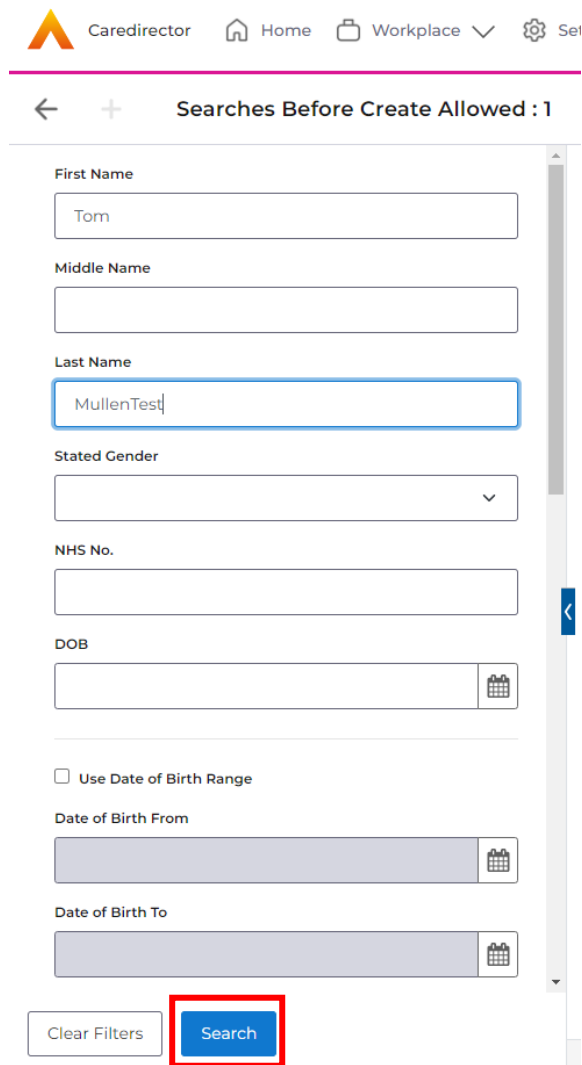


How to search for a Service User

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



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

A screenshot of the CareDirector search interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Set' options. Below this is a search bar with the text 'Searches Before Create Allowed : 1'. The main form contains several input fields: 'First Name' (containing 'Tom'), 'Middle Name' (empty), 'Last Name' (containing 'MullenTest'), 'Stated Gender' (a dropdown menu), 'NHS No.' (empty), 'DOB' (empty with a calendar icon), 'Use Date of Birth Range' (checkbox), 'Date of Birth From' (empty with a calendar icon), and 'Date of Birth To' (empty with a calendar icon). At the bottom of the form, there are two buttons: 'Clear Filters' and 'Search' (highlighted with a red box).

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).

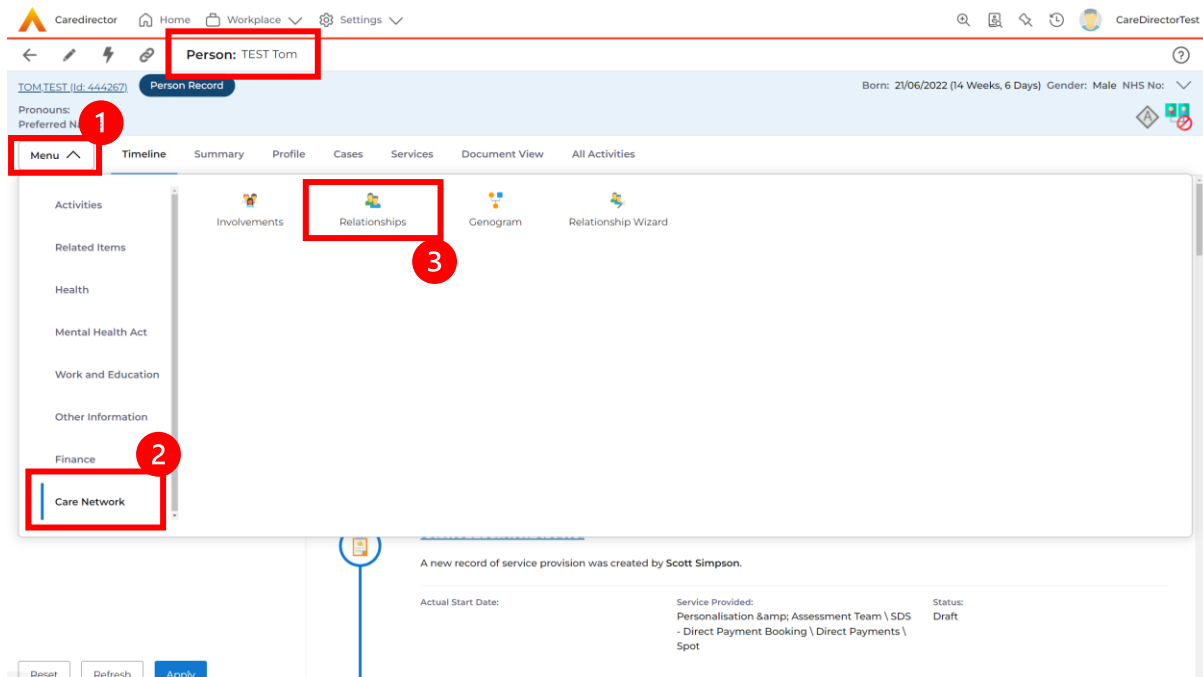
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The toolbar at the top contains a pencil icon (edit) which is highlighted with a red box and a red circle with the number '1'. Below the toolbar, the page displays a timeline of activities for October 2022 and September 2022. The activities include 'Form (Case) Created', 'Service Provision Created', and 'Task Created', each with a brief description and a timestamp.

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

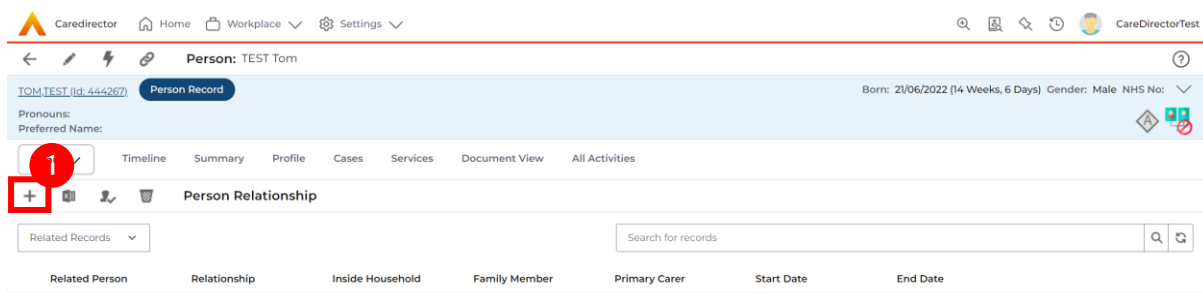
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. The toolbar at the top contains a 'Save and Return to Previous Page' button (represented by a floppy disk icon) which is highlighted with a red box and a red circle with the number '1'. Below the toolbar, the page displays a form for editing personal details. The form includes fields for 'Id', 'Title', 'First Name', 'Middle Name', 'Last Name', 'Stated Gender', 'Profile Picture', 'NHS No.', 'Reason for no NHS No.', 'Ethnicity', and 'Marital Status'.

How to add relationships

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



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



3. Inside this section:
 - a. The **Service User** will be the **Primary Person**.
 - b. **Is a** field, is what the **Primary Person** is to the other **Service User**.
 - c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on the system, they need to be created).
 - d. Within **Reciprocal Relationship** section will be the opposite.
 - e. **Nature of Relationship to Primary Person** can be manually inputted.

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

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

Pronouns: Preferred Name:

Details

Relationship to Other Person

Primary Person*

is a*

To*

Reciprocal Relationship

Person

is a*

To

Relationship Details

Start Date*

Responsible Team*

End Date

Description

Nature of Relationship to Primary Person

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

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

How to Enter Date of Death

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

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a search icon. The user is logged in 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 a timeline for 'OCT 2022' with two events: 'Form (Case) Created' and 'Task Created', both dated 'Yesterday at 11:12'. The 'Form (Case) Created' event includes details: 'A new record of form (case) was created by Scott Simpson.', 'Due Date: 20/11/2022', 'Form Type: DoLS Tracker - Cat 2', and 'Status: In Progress'. The 'Task Created' event includes details: 'A new record of task was created by Scott Simpson.'.

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'. The 'Cause of Death' field is a text input with a search icon. The 'Place of Death' field is a text input. The 'Date of Death' field is a date picker. The 'Person Record' title is visible at the top of the section.

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 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 Record' section displays 'TOM.TEST (Id: 444267)' and 'Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No:'. The 'Cases' tab is 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 Record' section displays 'TOM.TEST (Id: 444267)' and 'Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No:'. The 'Cases' tab is highlighted with a red box. The main content area shows a table of related records with the following columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', and 'Case Status'. The first three rows of the table are highlighted with a red box and a red circle containing the number '2'.

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

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

- 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' section is active, displaying a list of activities. On the left, there are filter options for Keyword, Activity Type, Date Type, and Date Range (From, To, Actual End). The 'From' date field is highlighted with a red box and a '1' in a red circle. The 'Search' button is highlighted with a red box and a '2' in a red circle.

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' section is active, displaying a list of activities. The 'Regarding' column in the activity list 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.

The screenshot shows the CareDirector interface for a 'Person Record' of TOM.TEST (id: 444267). The page includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below the navigation bar, there are tabs for 'Menu', 'Timeline', and 'Details'. The 'Menu' dropdown is open, showing options like 'Activities', 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. The 'Activities' option is highlighted with a red box and a '2' in a red circle. A '1' in a red circle is placed over the 'Menu' button.

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

The screenshot shows the CareDirector interface for a 'Person Record' of TOM.TEST (id: 444276). The page includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below the navigation bar, there are tabs for 'Menu', 'Timeline', and 'Details'. The 'Menu' dropdown is open, showing options like 'Activities', 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. The 'Activities' option is highlighted with a red box and a '2' in a red circle. A '1' in a red circle is placed over the '+' icon in the toolbar.

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

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

The screenshot shows the CareDirector web interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. A red box with a '2' highlights the 'Save' button in the top left. Below this is a breadcrumb trail: 'Case Note (For Case): New'. The main content area is titled 'Person Record' for 'TOM.TEST (id: 444267)'. It shows personal details like 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. Below this is a 'Details' section with a form. The form has several fields: 'Case *' (filled with 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'), 'Responsible Team *' (filled with 'CareDirectorTest'), 'Responsible User' (filled with 'Scott Simpson'), 'Reason', 'Priority', 'Date *', 'Status *' (set to 'Open'), 'Category', 'Sub-Category', and 'Outcome'. A red box with a '1' highlights the 'Responsible User' field. At the bottom of the form, there is a checkbox for 'Contains Information Provided By A Third Party?'.

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

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

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

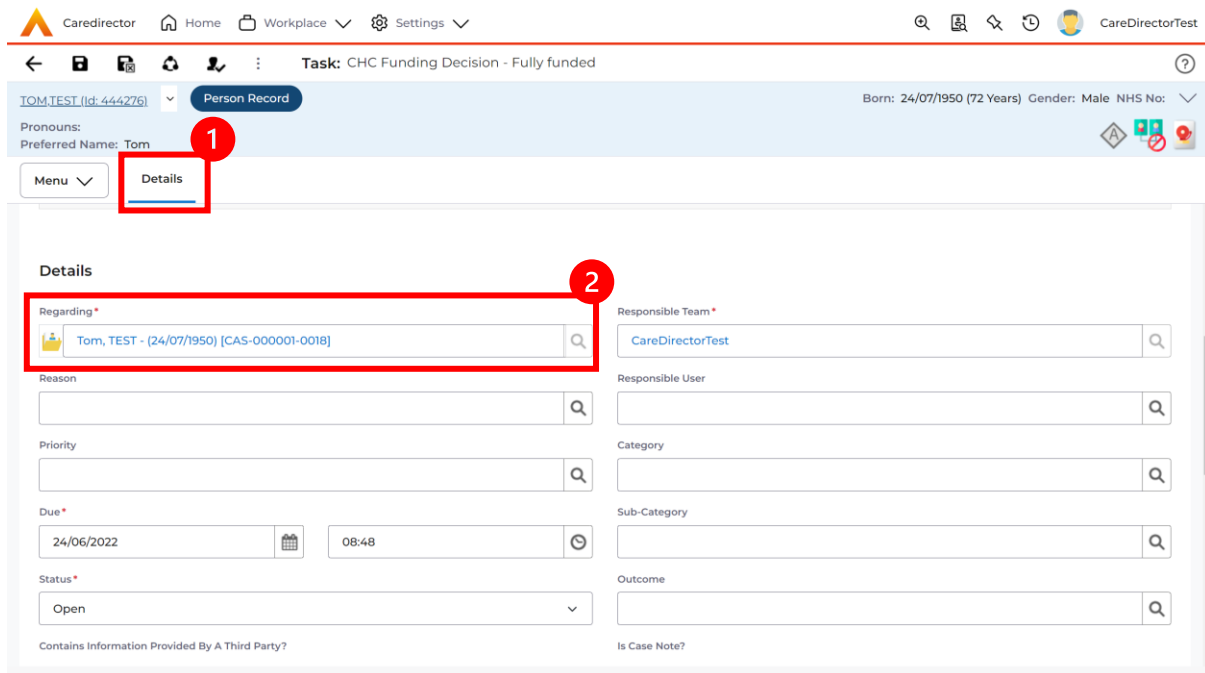
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955) [CAS-000001-000...'. The main content area shows a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

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

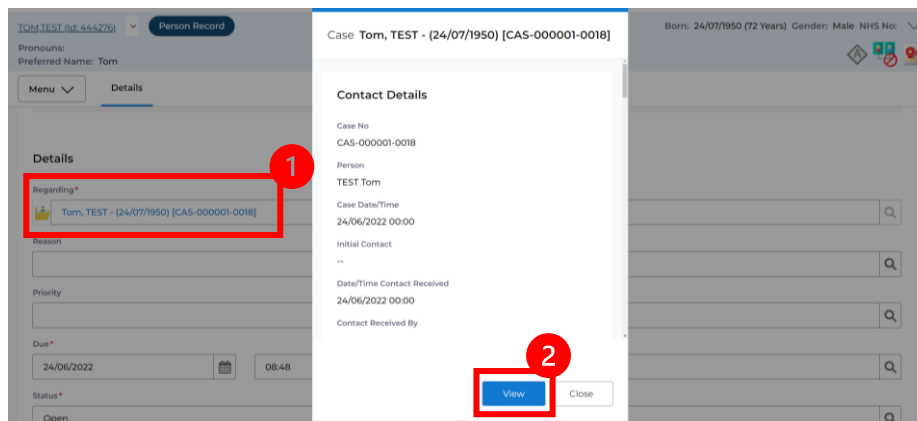
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Task: Test Task for Case'. The main content area shows a form for 'MULLENTEST, Tom (Id: 444264)'. The 'Task' is 'Test Task for Case'. The 'Activate' icon in the toolbar is highlighted with a red box and a red circle with the number '2'. A red circle with the number '1' is next to the 'Task' field.

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

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



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



How to Allocate a new Activity to another team

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

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

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

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

Name	Business Unit
<input type="checkbox"/> Adults Connecting Care Team West	Adult Services
<input type="checkbox"/> AMHP rota	Adult Services
<input type="checkbox"/> CareDirector	CareDirector
<input type="checkbox"/> Sensory Impairment Team	Adult Services

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

The screenshot shows the CareDirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom (Id: 446230)'. The 'Details' section contains several fields: 'Regarding' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Responsible Team' (Sensory Impairment Team), 'Responsible User' (Scott Simpson), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Category', 'Sub-Category', and 'Outcome'. The 'Responsible User' field has a red box around the 'X' button and a '1' in a red circle. The 'Regarding' field has a red box around the 'X' button and a '2' in a red circle. There are also radio buttons for 'Contains Information Provided By A Third Party?' and 'Is Case Note?'.

How to Allocate an existing Activity to another team

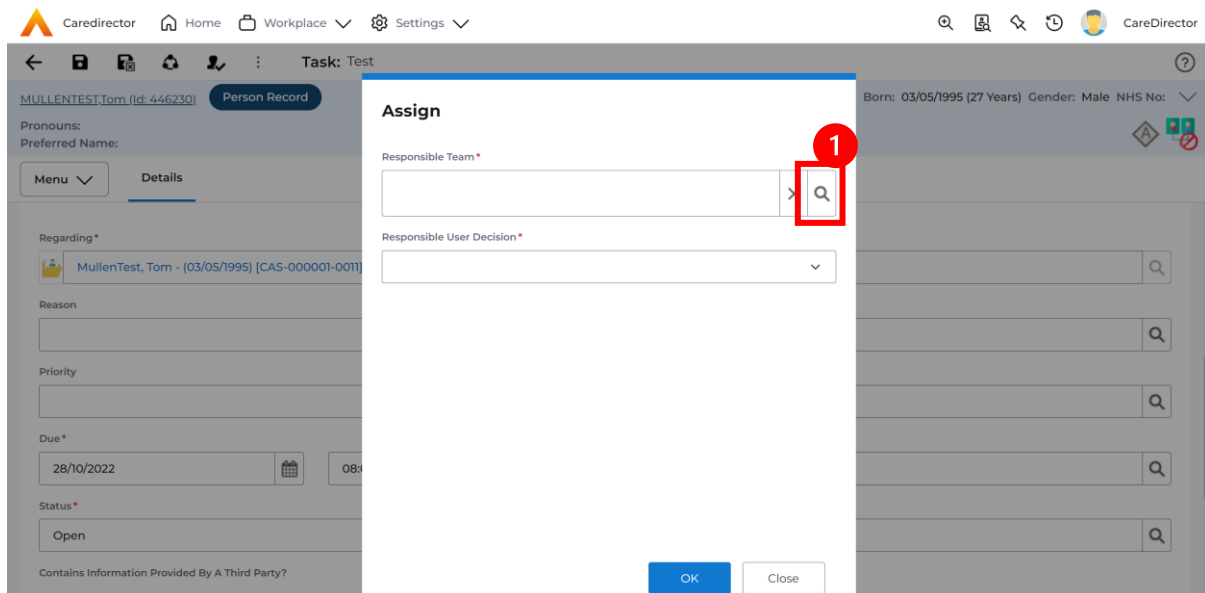
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the 'Details' view of a task record. 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 'Regarding' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due' (28/10/2022, 08:00), 'Status' (Open), and 'Outcome'.

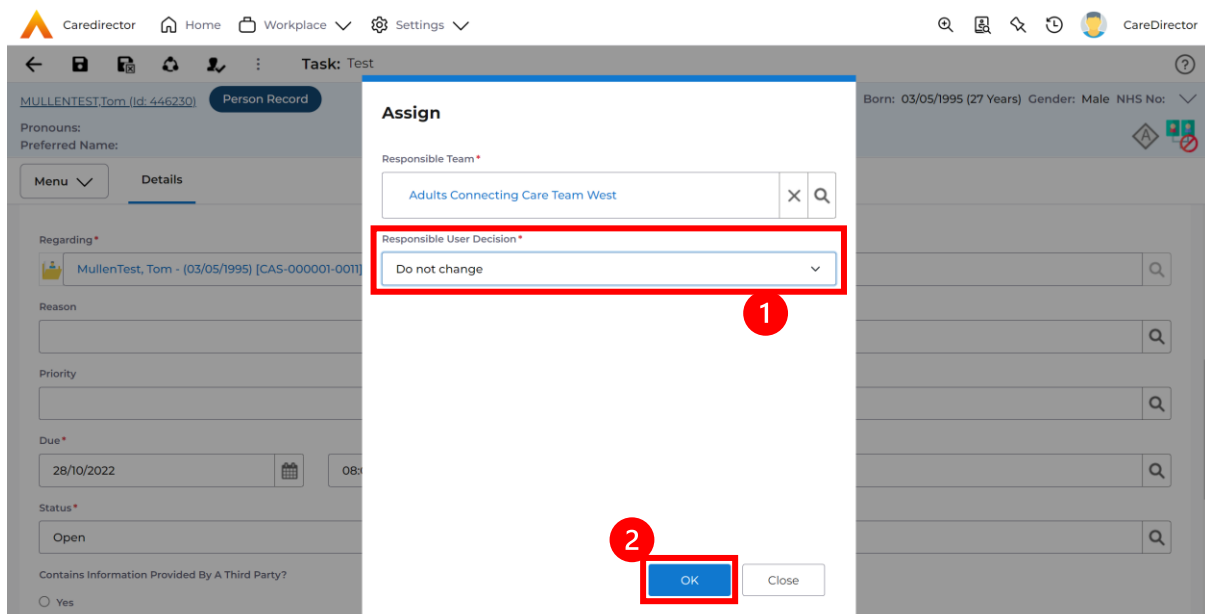
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same task record as above. A red box highlights the toolbar at the top, with a red circle containing the number '1' next to it. The toolbar contains icons for back, forward, refresh, and other actions. The 'Responsible User' field is now empty, and the 'Responsible Team' remains 'Sensory Impairment Team'.

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



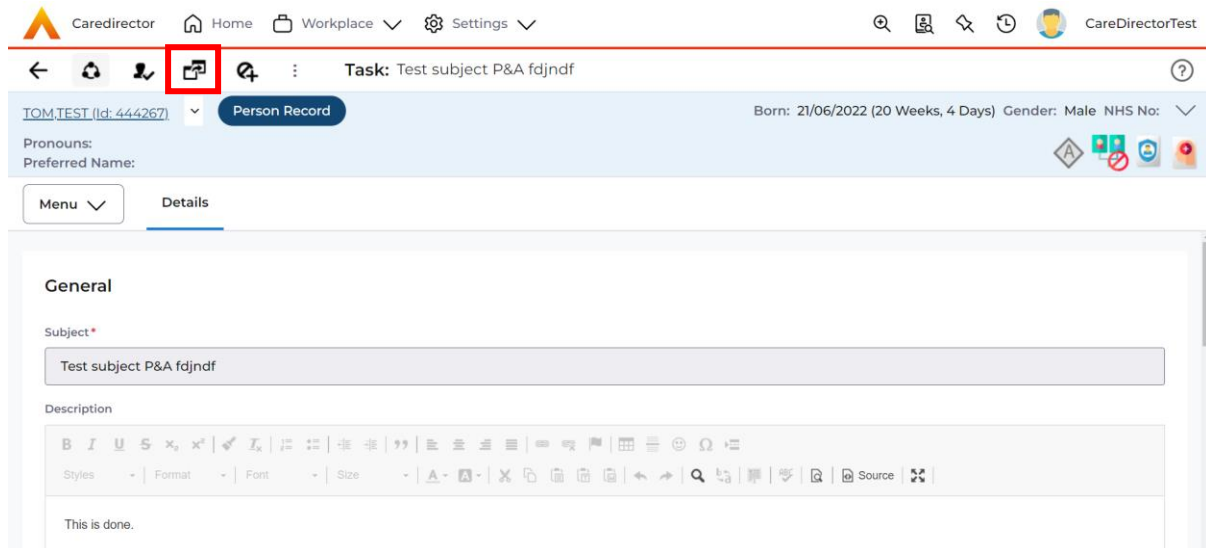
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



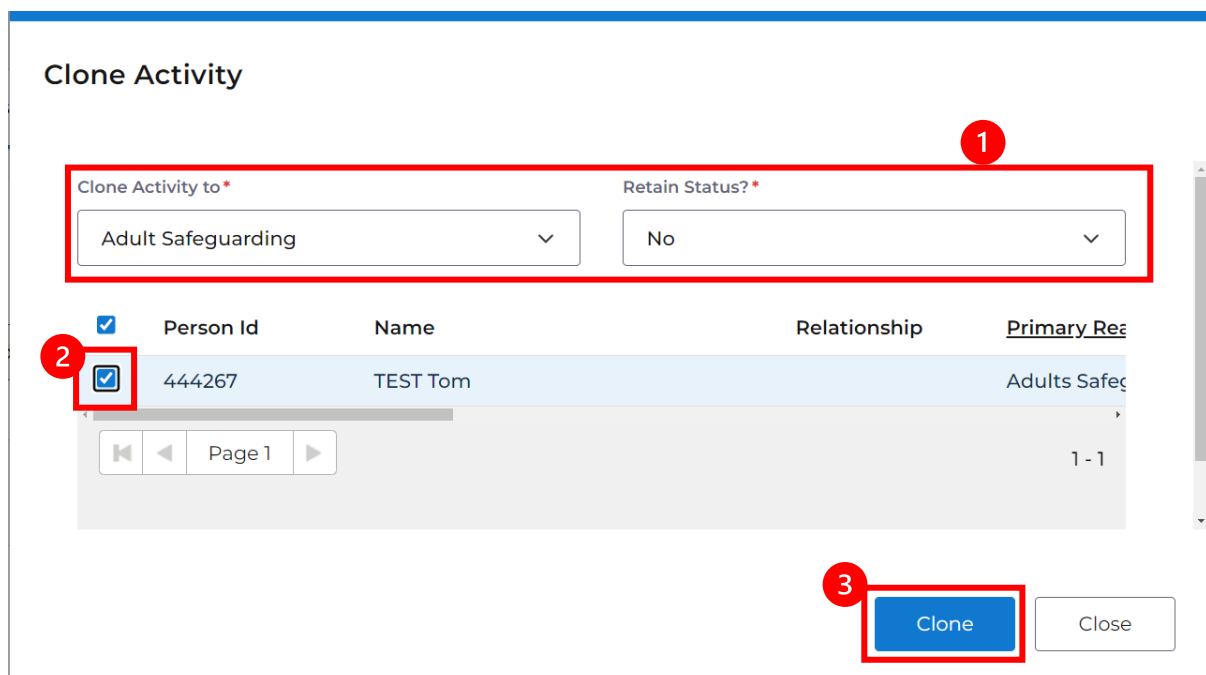
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

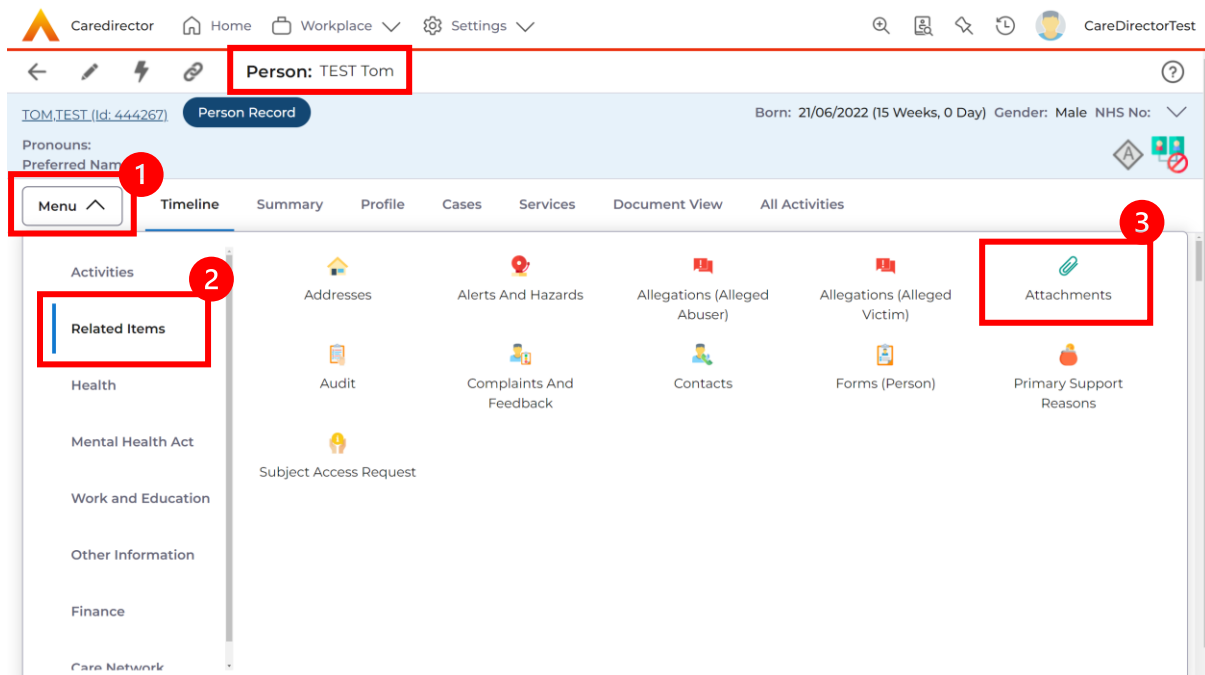


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

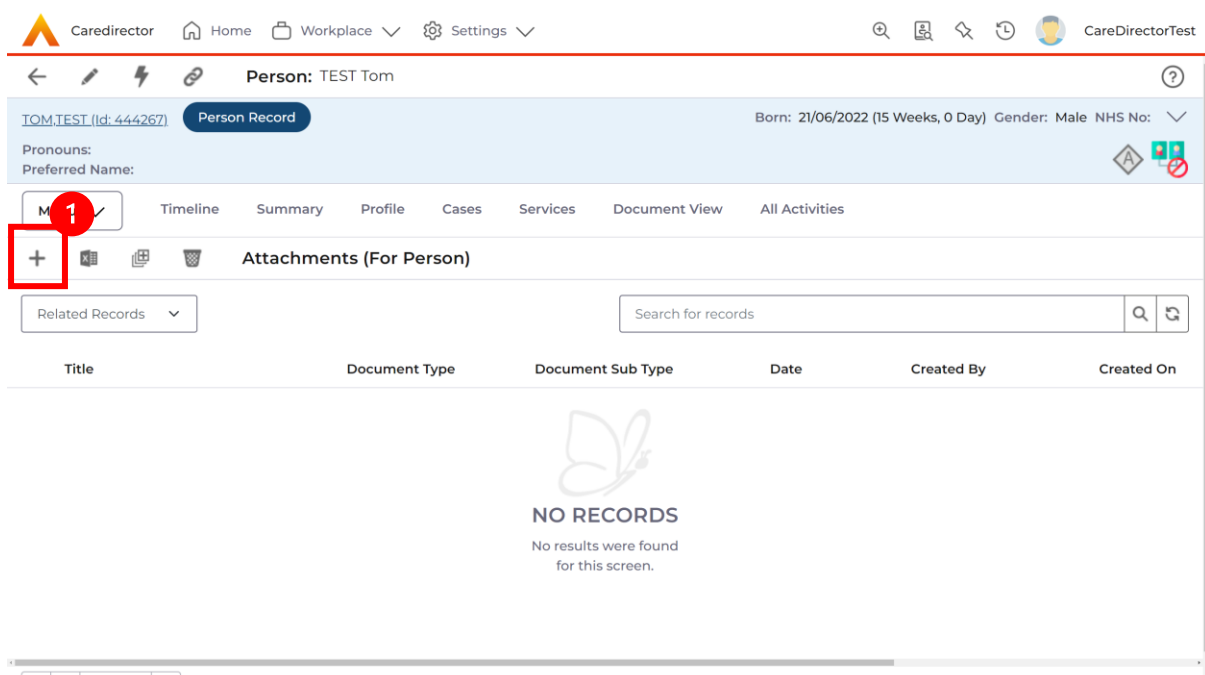


How to upload Attachments

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



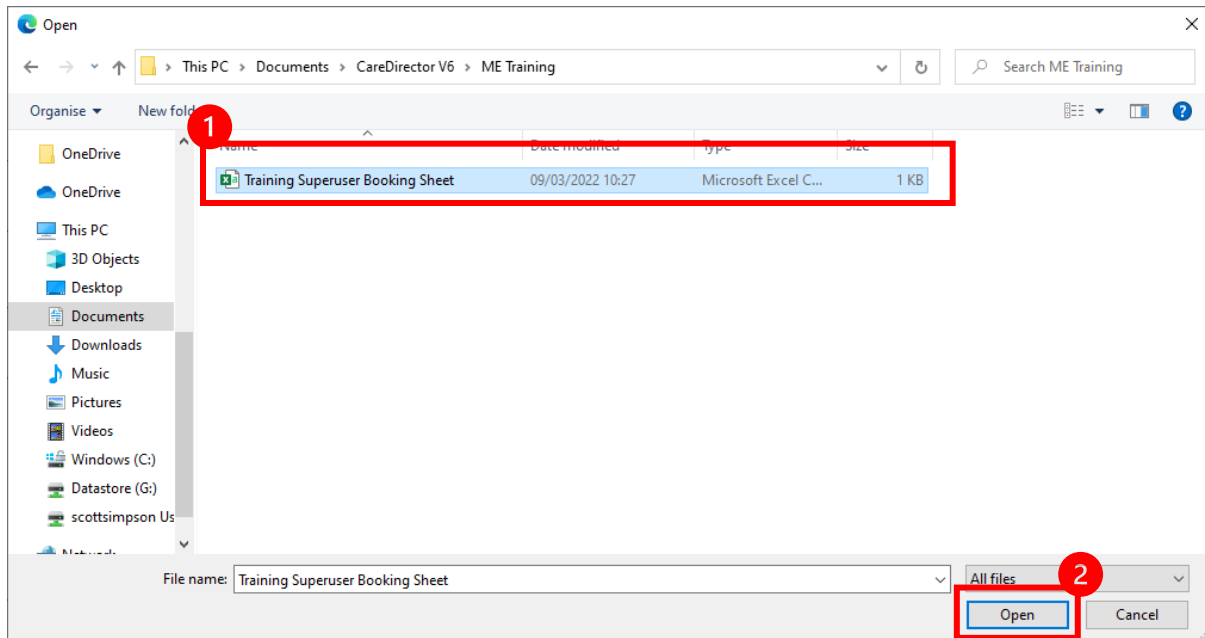
2. When opened, select the **Create New Record** from the toolbar.



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

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

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



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

How to upload multiple attachments

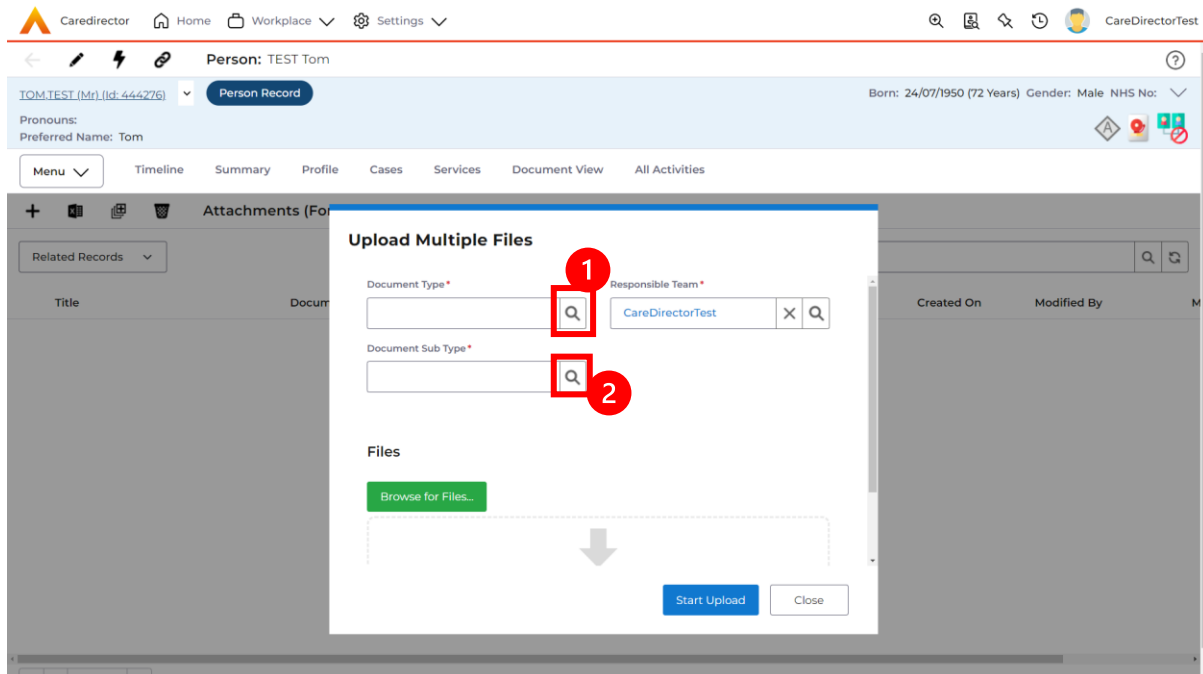
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The record is for 'Person: TEST Tom' (ID: 444267), born 21/06/2022, male. The left sidebar menu is open, and the 'Related Items' section is selected. The 'Attachments' button is highlighted in the main content area.

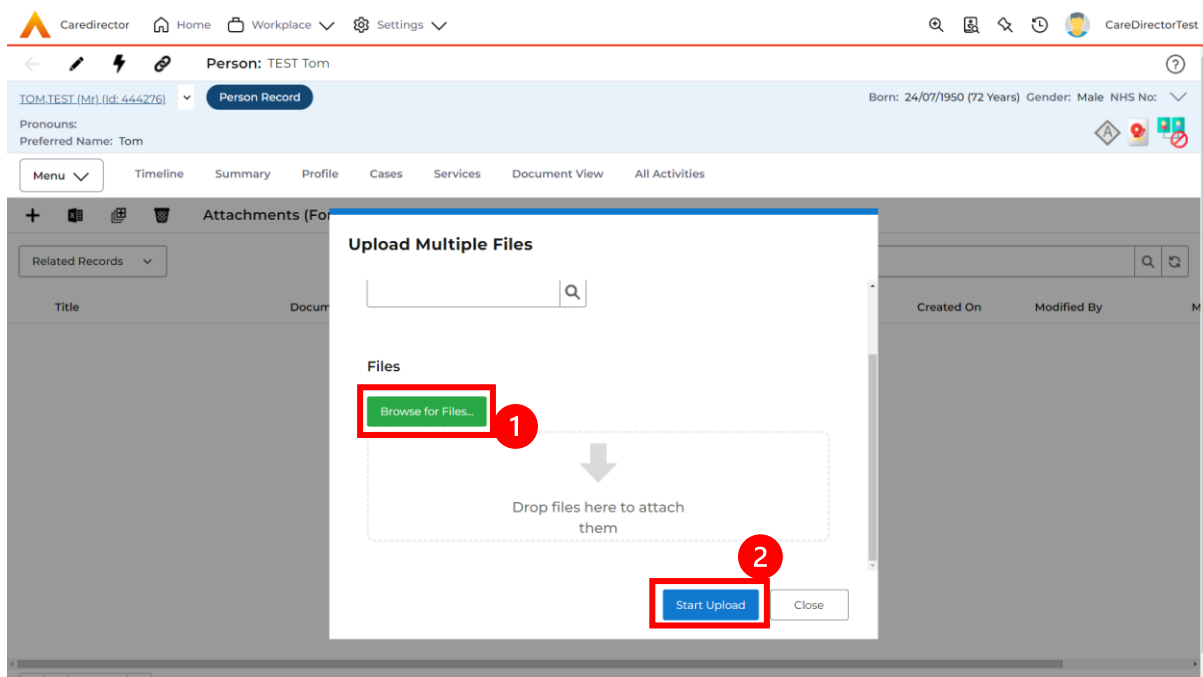
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.

The screenshot shows the 'Attachments (For Person)' screen. The toolbar at the top contains icons for adding, deleting, and uploading files. The 'Upload Multiple Files' icon is highlighted with a red box and the number 1. Below the toolbar is a search bar and a table with the following columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is currently empty, and a message at the bottom states 'NO RECORDS No results were found for this screen.'

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



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



How to find a Form (Case)

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

The screenshot shows the CareDirector interface for a case 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 the 'Related Items' option is selected. The 'Forms (Case)' option is highlighted in the sub-menu.

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

The screenshot shows the 'Forms (Case)' sub-menu. The 'Related Records' dropdown is open, and the first record is selected. The table below shows the details of the selected record.

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

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

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

Person Record

Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Menu ^ Timeline Details

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

Related Items Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

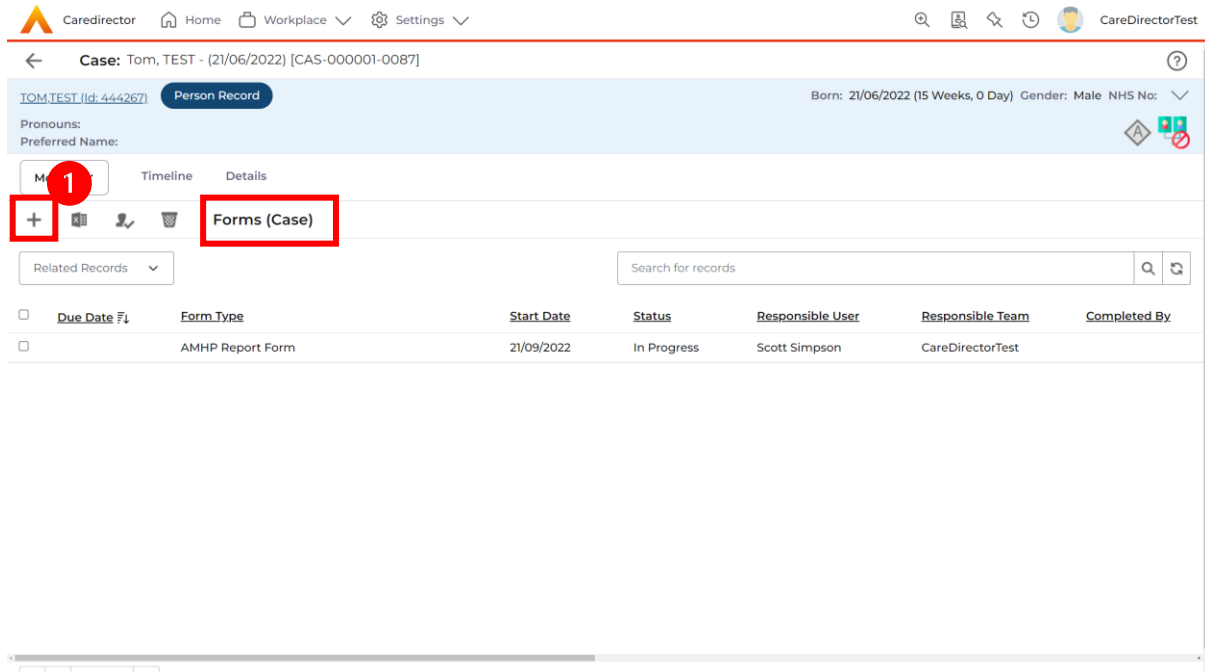
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

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

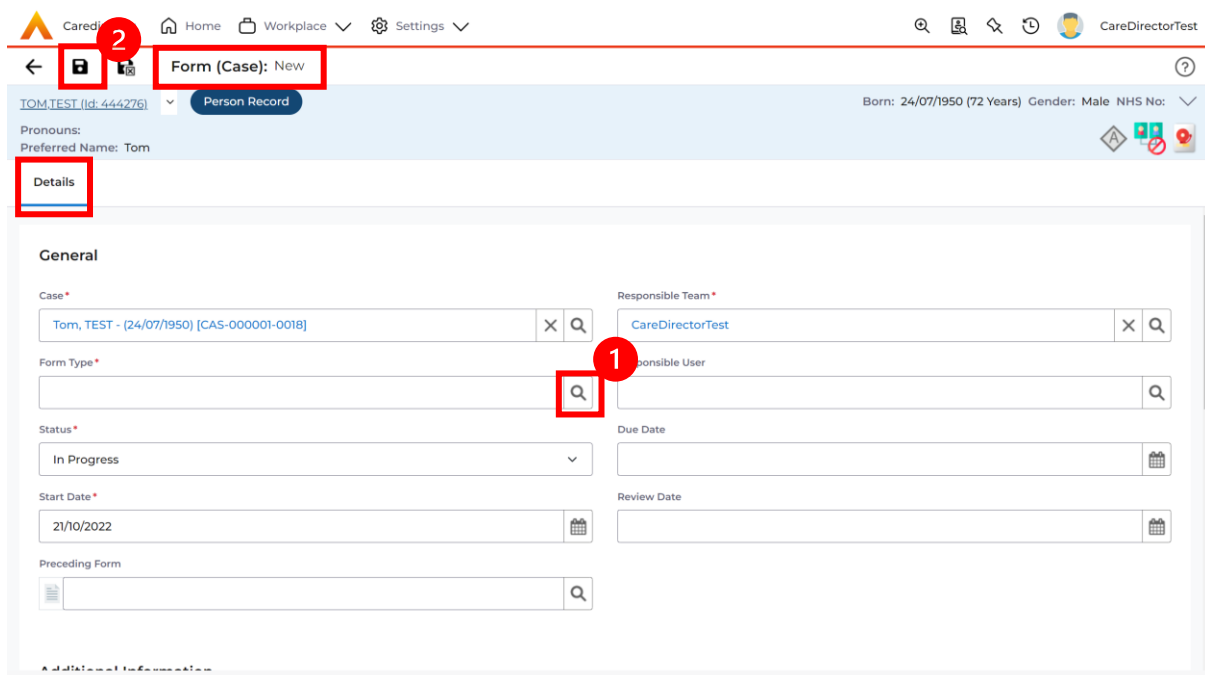
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational Therapist Start Date: 21/09/2022

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



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



5. Now that CareDirector has given us the correct **Form**, the **Edit** button appears on the toolbar. This will allow us to go into the **Form** and fill it out.

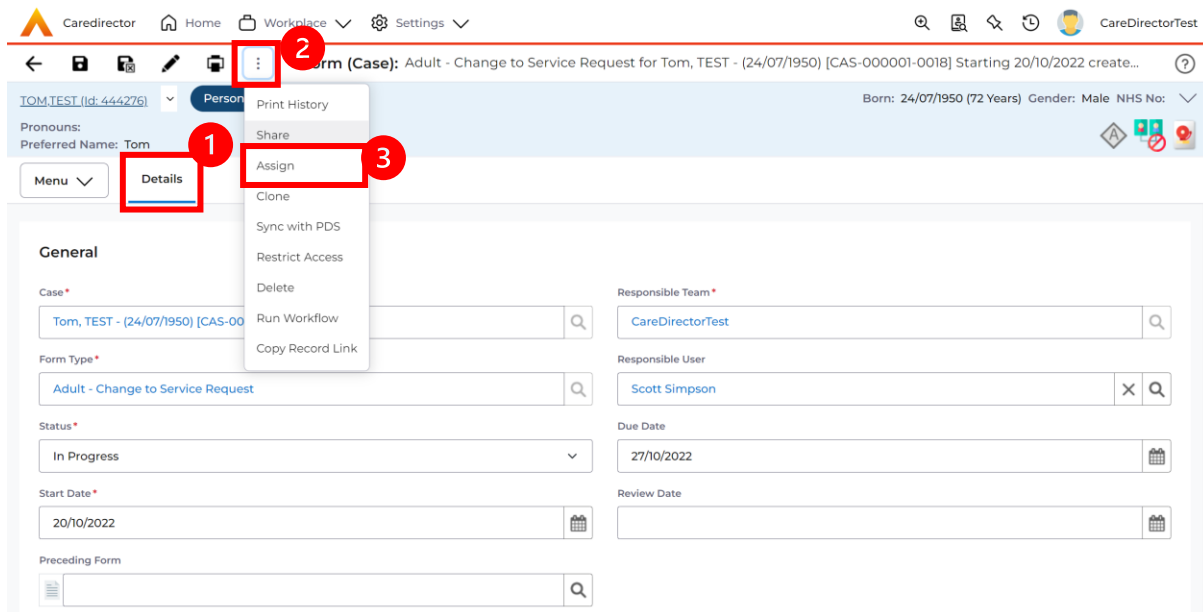
The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The toolbar at the top contains several icons, with the "Edit" icon (a pencil) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the case name, responsible team (CareDirectorTest), responsible user (Scott Simpson), status (In Progress), start date (21/09/2022), and due/review dates. The main content area shows a "General" section with various form fields for case information.

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

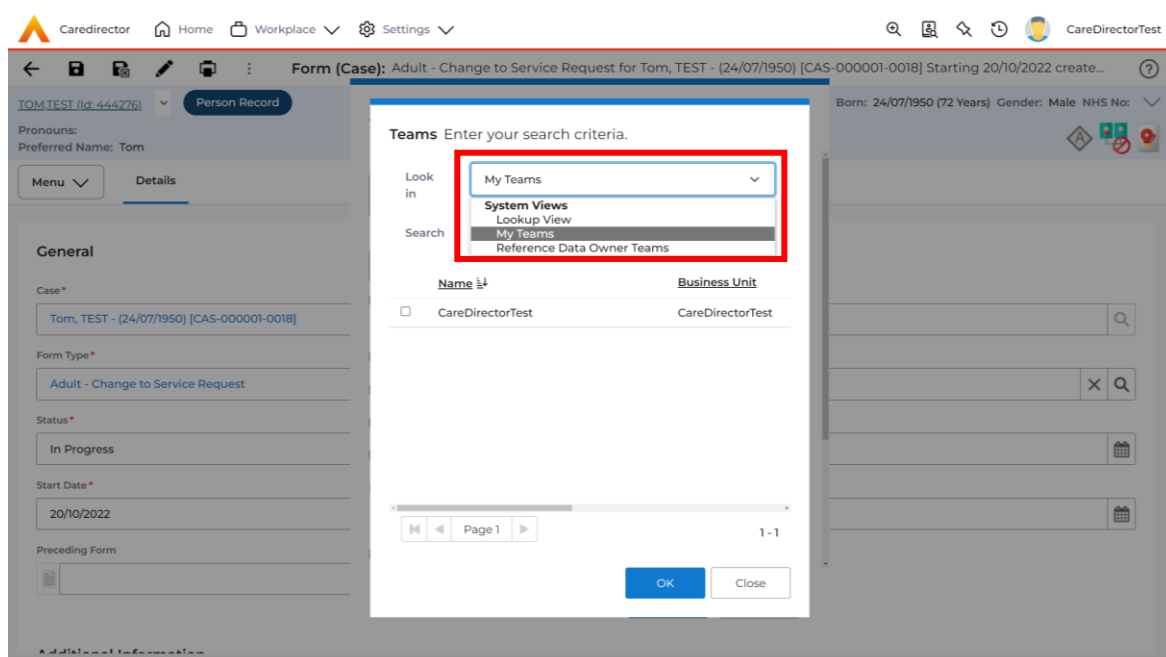
The screenshot shows the CareDirector interface for the "AMHP Report Form". The toolbar at the top contains several icons, with the "Save" icon (a floppy disk) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the case name, responsible team, responsible user, status, start date, and due/review dates. The main content area shows a "Service User Details" section with a "Client previously known to services?" question and an "Ethnic Origin" section with a list of options.

How to Allocate a Form

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



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



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

The screenshot shows the 'Assign' dialog box in the CareDirectorTest application. 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, with 'Check/Uncheck All' selected. Other checked items include 'Appointment', 'Assessment Factor', 'Attachment (Case Form)', 'Email', and 'Email Attachment'.
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

The background shows a 'Form (Case): Adult - Change to Service Request for Tom, TEST - (24/07/1950) [CAS-000001-0018]' with various fields like 'Case*', 'Form Type*', 'Status*', 'Start Date*', and 'Preceding Form'.

How to Clone a Form

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

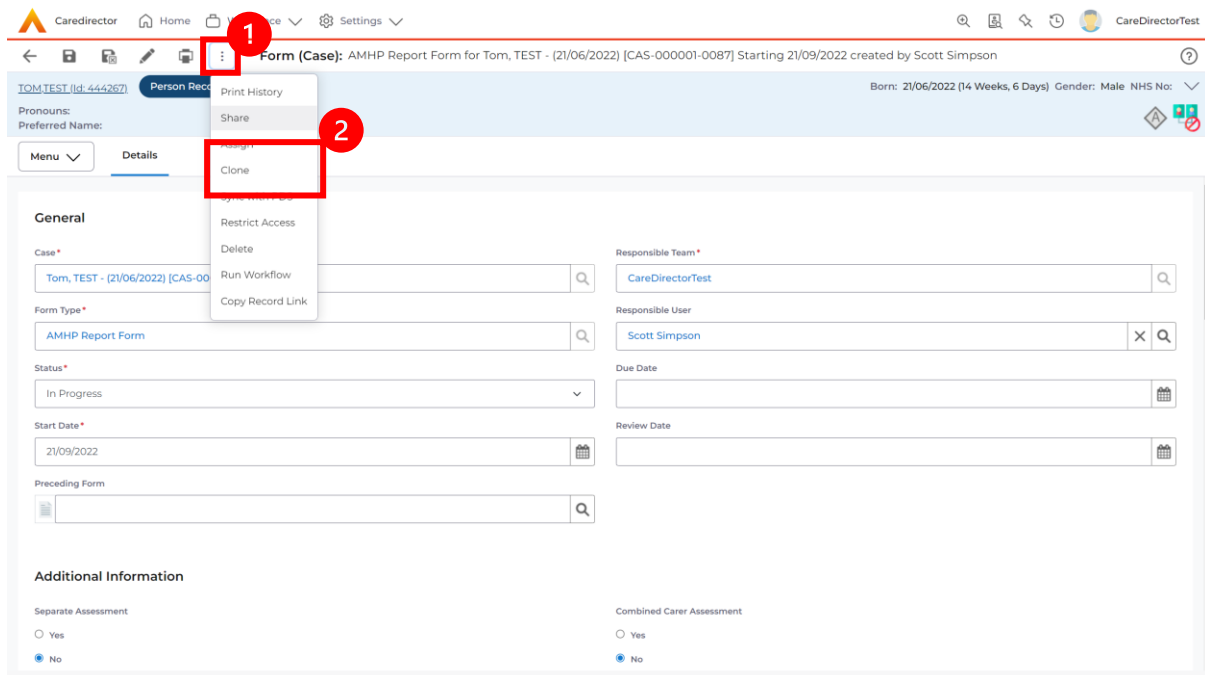
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' dropdown is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' submenu. The main content area shows a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

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

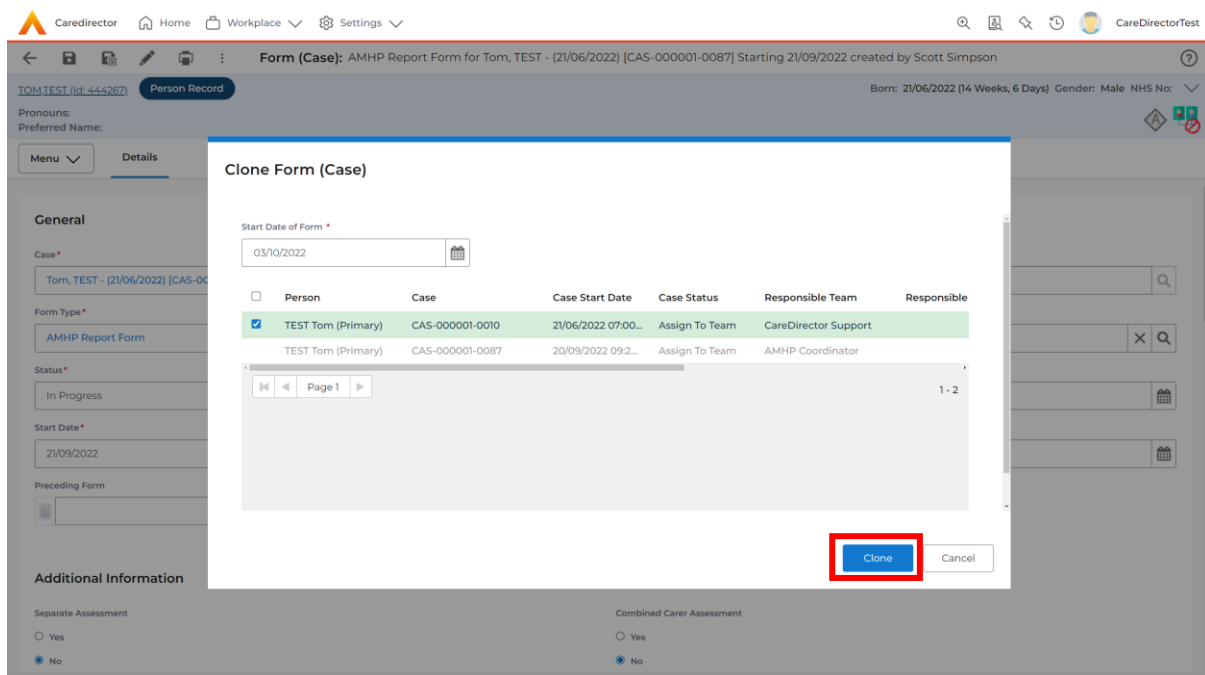
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' view is active. The 'Related Records' dropdown is open, and the 'AMHP Report Form' is selected. The table below shows the details of the selected form.

	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

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



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



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

- Please note: If you would like to **Clone** a **Form** that has another **Status** other than **closed**. You cannot have two **Forms** that are the same in the same **Case**. Therefore, if you want to **Clone** a **Form** to the same **Case** ensure that you **Closed** that **Form** first and get that signed off by the appropriate **System User**.

The screenshot shows the CareDirector interface for a 'Form (Case)'. The breadcrumb trail is: Home > Workplace > Settings > Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022... The user is logged in as 'CD V6 Team'. The record is for 'TOM TEST (id: 444267)' with a 'Person Record' button. The user's profile shows 'Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:'. The 'Details' tab is active, showing the following information:

General	
Case*	Tom, TEST - (21/06/2022) [CAS-000001-0087]
Form Type*	Adult Care and Support Plan
Status*	Closed
Start Date*	09/11/2022
Preceding Form	
Responsible Team*	CareDirectorTest
Responsible User	Scott Simpson
Due Date	11/11/2022
Review Date	
Completion Details	
Completed By*	Scott Simpson
Signed Off By*	Scott Simpson
Completion Date*	09/11/2022
Signed Off Date*	09/11/2022

How to reactivate a Closed Form

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the user 'CareDirectorTest'. Below this, a breadcrumb trail shows 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The form details are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0010]
Form Type *	Occupational Therapy Conversation Record
Status *	Closed
Start Date *	10/11/2022
Responsible Team *	CareDirectorTest
Responsible User	Scott Simpson
Due Date	20/12/2022
Review Date	

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

This screenshot shows the same form as the previous one, but with the three-dot menu open. A red circle labeled '1' highlights the menu icon, and a red box labeled '2' highlights the 'Activate' option. The dropdown menu contains the following options:

- Share
- Assign
- Clone
- Restrict Access
- Activate
- Delete
- Run Workflow
- Copy Record Link

Where to find Service Provisions

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

The screenshot shows the CareDirector interface for a person record. The breadcrumb navigation at the top reads "Person: TEST Tom". The "Services" tab is highlighted with a red box and a red circle containing the number "1". The main content area displays a timeline for "SEP 2022" with three entries: "Task Created", "Form (Case) Created", and "Case Involvement Updated".

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

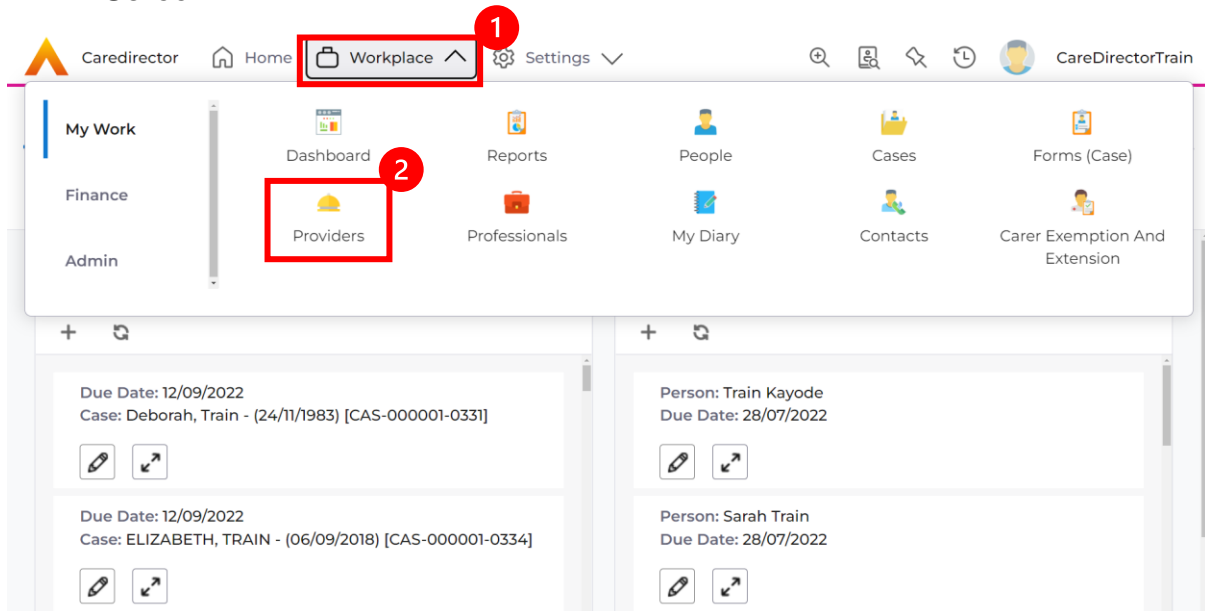
The screenshot shows the CareDirector interface with the "Services" tab selected. A red box and a red circle containing the number "2" highlight the "+" button in the toolbar, which is used to create a new record. Below the toolbar, a table of "Service Provisions" is visible, with one record listed.

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

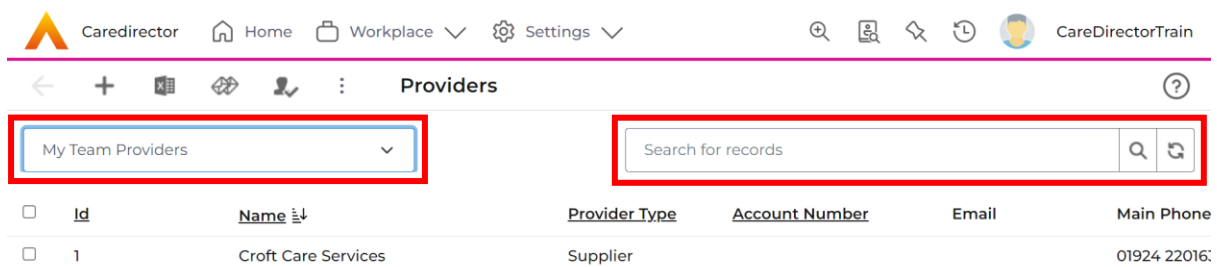
4. Then follow the appropriate section to complete the **Service Provision**.

How to search for a Provider

1. Select **Workplace**, then **Provider**. This will open the **Provider Search Screen**.

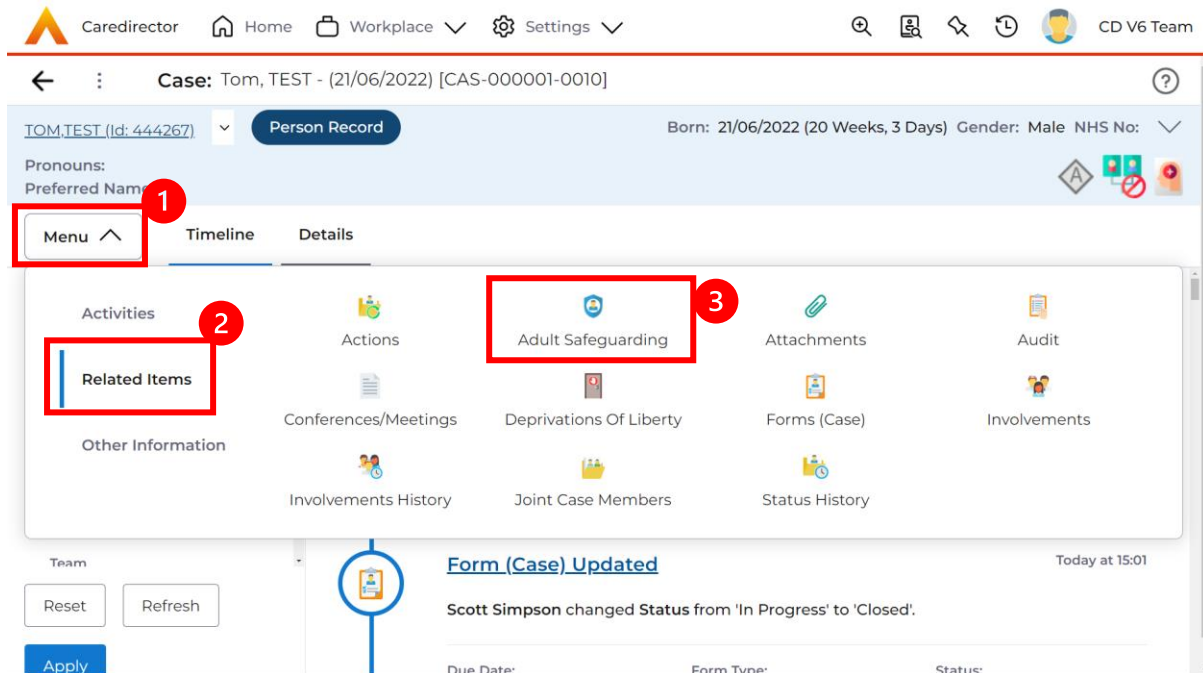


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.



How to find an Adult Safeguarding Module

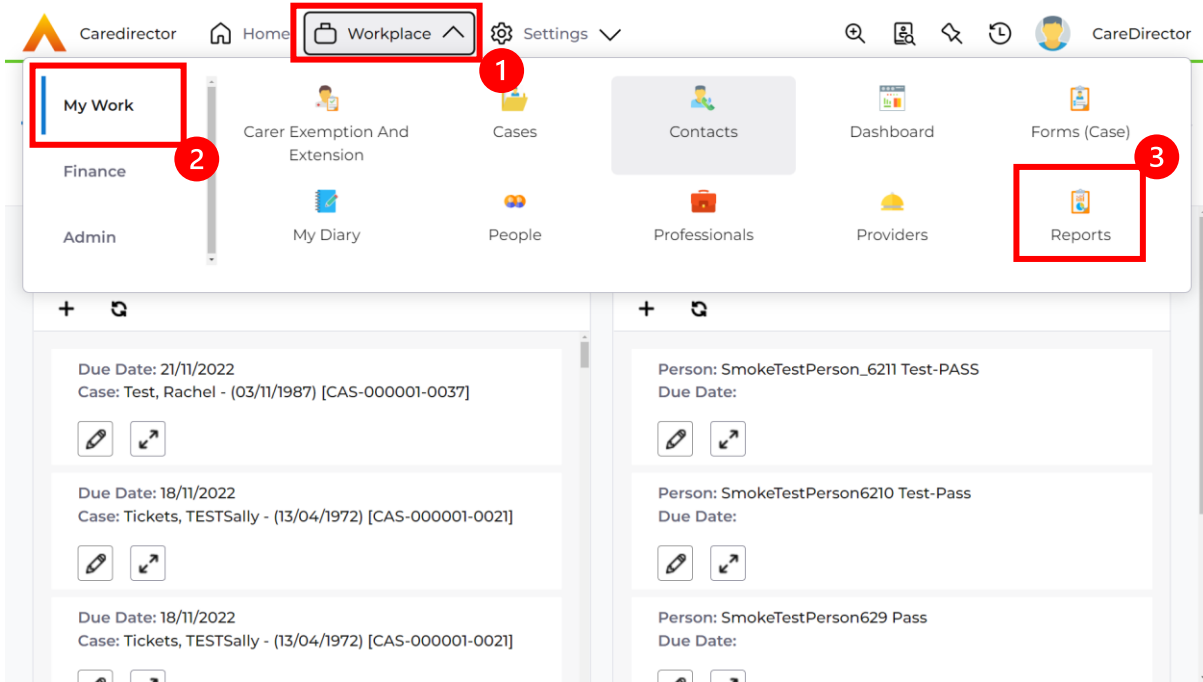
1. Locate the **Case** the **Adult Safeguarding Module** is on. Then select **Menu**, **Related Items** and **Adults Safeguarding**.



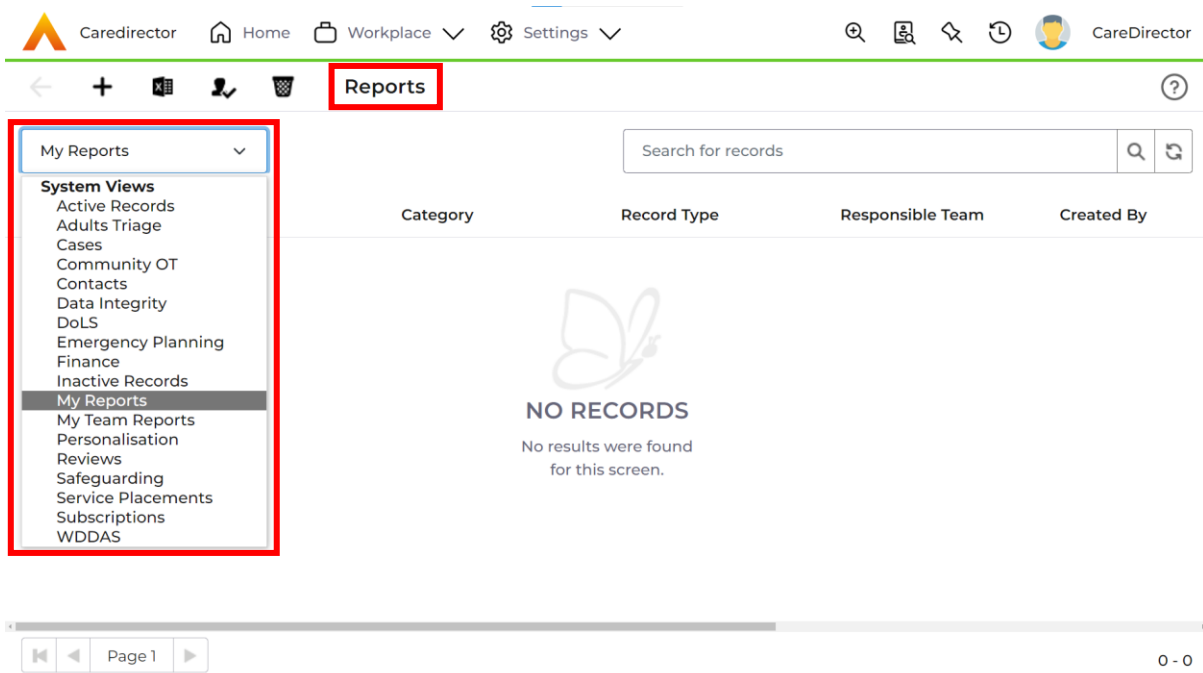
2. Select from the list the **Adult Safeguarding Module** you would like to view.

How to find Reports

1. On the **Navigation Menu**, select **Workplace**, **My Work** and then **Reports**.



2. Using the **System View** search through to your relevant team name and select it.



3. When your team has been selected, a list of **Reports** will be available. Select the relevant one.

<input type="checkbox"/>	Title	Created By	Created On	Modified By	Modified On
<input type="checkbox"/>	All Wkly Open Safe Refs	Jonathon Brailsford	25/10/2022 11:41:17	Jonathon Brailsford	01/11/2022 11:24:31
<input type="checkbox"/>	ASG Wkly Closed Safe Refs	Jonathon Brailsford	25/10/2022 11:42:15	Jonathon Brailsford	25/10/2022 11:42:15
<input type="checkbox"/>	DA28 Detail Report	Jonathon Brailsford	25/10/2022 11:18:33	Jonathon Brailsford	02/11/2022 13:26:...
<input type="checkbox"/>	DA28 Report	Jonathon Brailsford	25/10/2022 11:26:03	Jonathon Brailsford	25/10/2022 11:26:03
<input type="checkbox"/>	DA28 Report with Extras	Jonathon Brailsford	25/10/2022 11:27:02	Jonathon Brailsford	25/10/2022 11:27:02
<input type="checkbox"/>	DA4 Report	Jonathon Brailsford	25/10/2022 11:27:46	Jonathon Brailsford	25/10/2022 11:27:46
<input type="checkbox"/>	Emergency Planning Report - Active ...	Jonathon Brailsford	02/11/2022 07:46:...	Jonathon Brailsford	03/11/2022 16:27:45
<input type="checkbox"/>	New WDDAS Exit form	Jonathon Brailsford	25/10/2022 11:28:32	Jonathon Brailsford	25/10/2022 11:28:32
<input type="checkbox"/>	New WDDAS Exit Form V2	Jonathon Brailsford	25/10/2022 11:29:14	Jonathon Brailsford	25/10/2022 11:29:14
<input type="checkbox"/>	Person ID Test	Marc Musgrave	25/10/2022 11:48:...	Marc Musgrave	25/10/2022 14:16:51

4. When selected, it will show this screen. To run the **Report**, select either one of the two options inside of the red boxes (please note the red boxes are only available in this guide).

Report: Emergency Planning Report - Active Adult Service Users

Menu ▾ Details

General

Title *
Emergency Planning Report - Active Adult Service Users

Description

Report URL *
<https://cdv6reporting.wakefield.gov.uk/Reports/report/W...>

Responsible Team *
CareDirector

Category *
Emergency Planning

Record Type
ServiceProvision

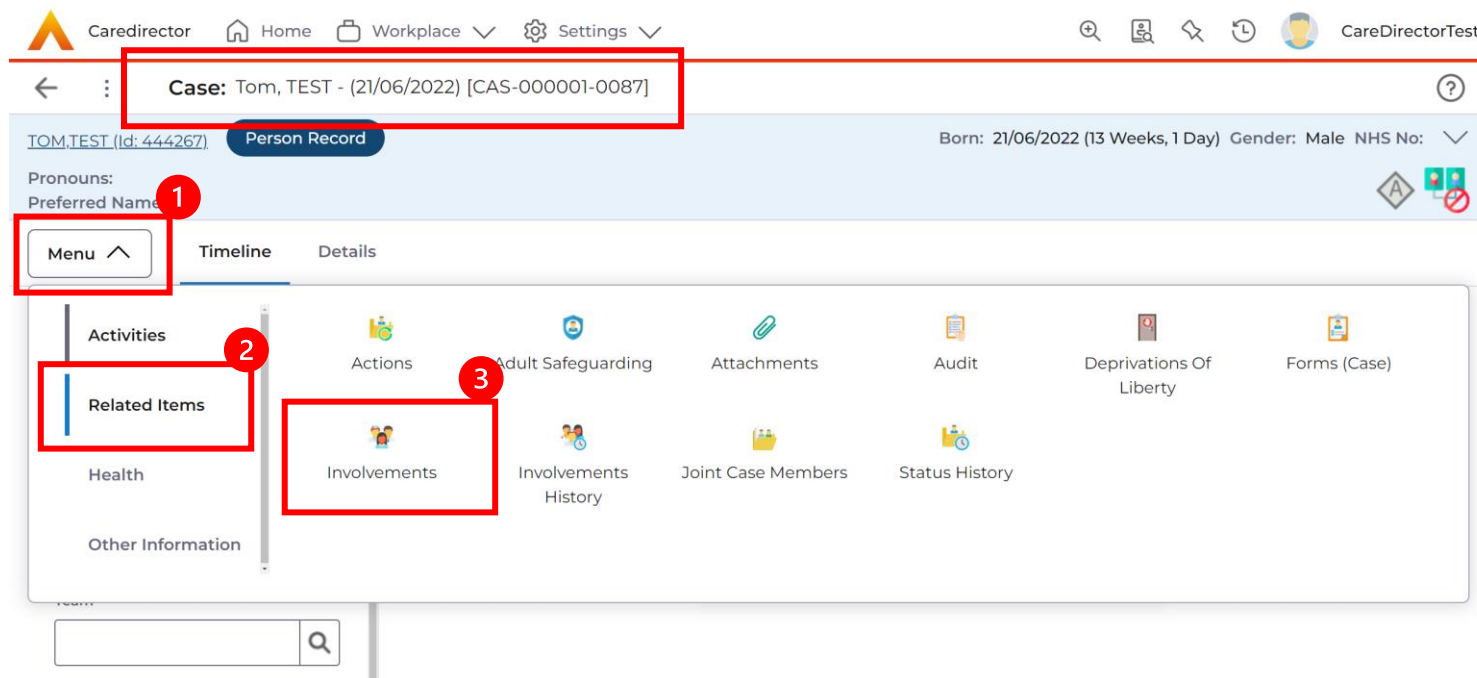
Pass User Information?
 Yes
 No

Display in Record Type Menu

How to close a Case

Ending Secondary Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.
2. Only the secondary and external **Involvements** need to have an end date. The **Responsible User/ Team** will automatically end once the **Case** has been **closed**.
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements**.



4. Open the relevant entry by double clicking an open space. This will open the involvement.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. The user is logged in as 'CareDirectorTest'. The main content area displays a 'Person Record' for 'TOM,TEST (Id: 444267)' with details such as 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. Below this, there are tabs for 'Menu', 'Timeline', and 'Details'. The 'Case Involvements' section is active, showing a table of related records. The table has columns for 'Involvement Member', 'Role', 'Involvement Re...', 'Case', 'Responsible Team', 'Start Date', 'End Date', and 'Create...'. One record is highlighted with a red border: 'Community Occupatio...' with 'Occupational Th...' role, associated with 'Tom, TEST - (21/06/2022) [CAS-000001-0087]', managed by 'CareDirectorTest', starting on '21/09/2022', and created by 'Scott'.

<input type="checkbox"/>	<u>Involvement Member</u>	<u>Role</u>	<u>Involvement Re...</u>	<u>Case</u>	<u>Responsible Team</u>	<u>Start Date</u>	<u>End Date</u>	<u>Create...</u>
<input type="checkbox"/>	Community Occupatio...	Occupational Th...		Tom, TEST - (21/06/2022) [CAS-000001-0087]	CareDirectorTest	21/09/2022		Scott

5. Enter today's date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Secondary and External Involvements** are ended.

The screenshot displays the CareDirector interface for a Case Involvement. The top navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus, along with search, user profile, and notification icons. The main header shows the current case: "Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...". Below the header, a "Menu" dropdown and a "Details" tab are visible. The "General" section of the form contains the following fields:

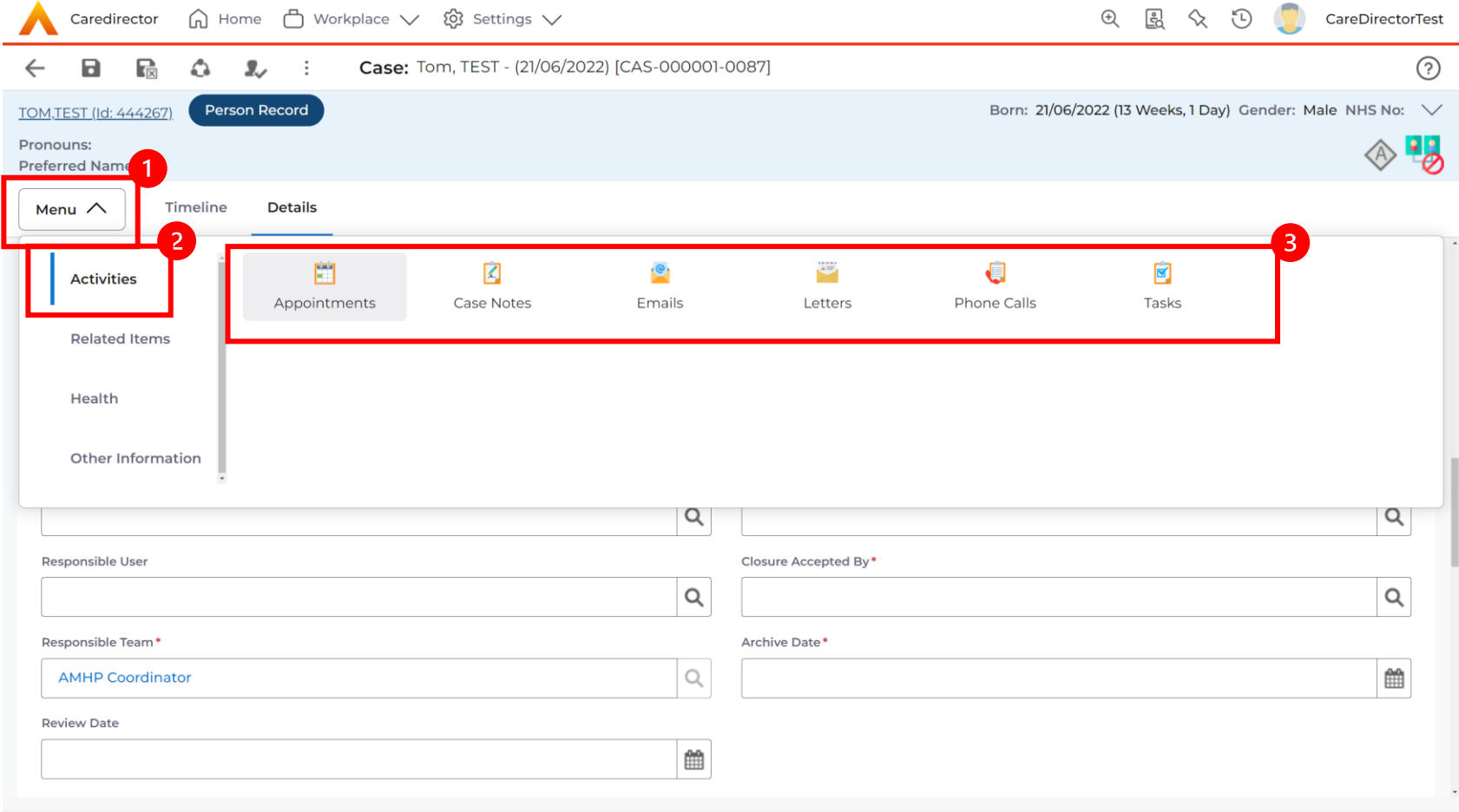
- Case***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team***: CareDirectorTest
- Person***: TEST Tom
- Involvement Member***: Community Occupational Therapy Service
- Role***: Occupational Therapist
- Start Date***: 21/09/2022
- Involvement Reason**: (empty)
- End Date**: 21/09/2022 (highlighted with a red box and a red circle with '1')
- Involvement End Reason**: (empty)
- Involvement Review Date**: (empty)

The "Description" field is located at the bottom of the form.

6. If the Case cannot be closed, there will be ongoing work associated with the Case.

Close an Open Activity

1. Select **Menu** within the **Case Record**. Then select **Activities** and open the relevant location of an activity.



2. Open the relevant location of an activity has been opened. Select the **Activity** that needs to be closed from the options.

Caredirector Home Workplace Settings

CareDirectorTest

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

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Pronouns: Preferred Name:

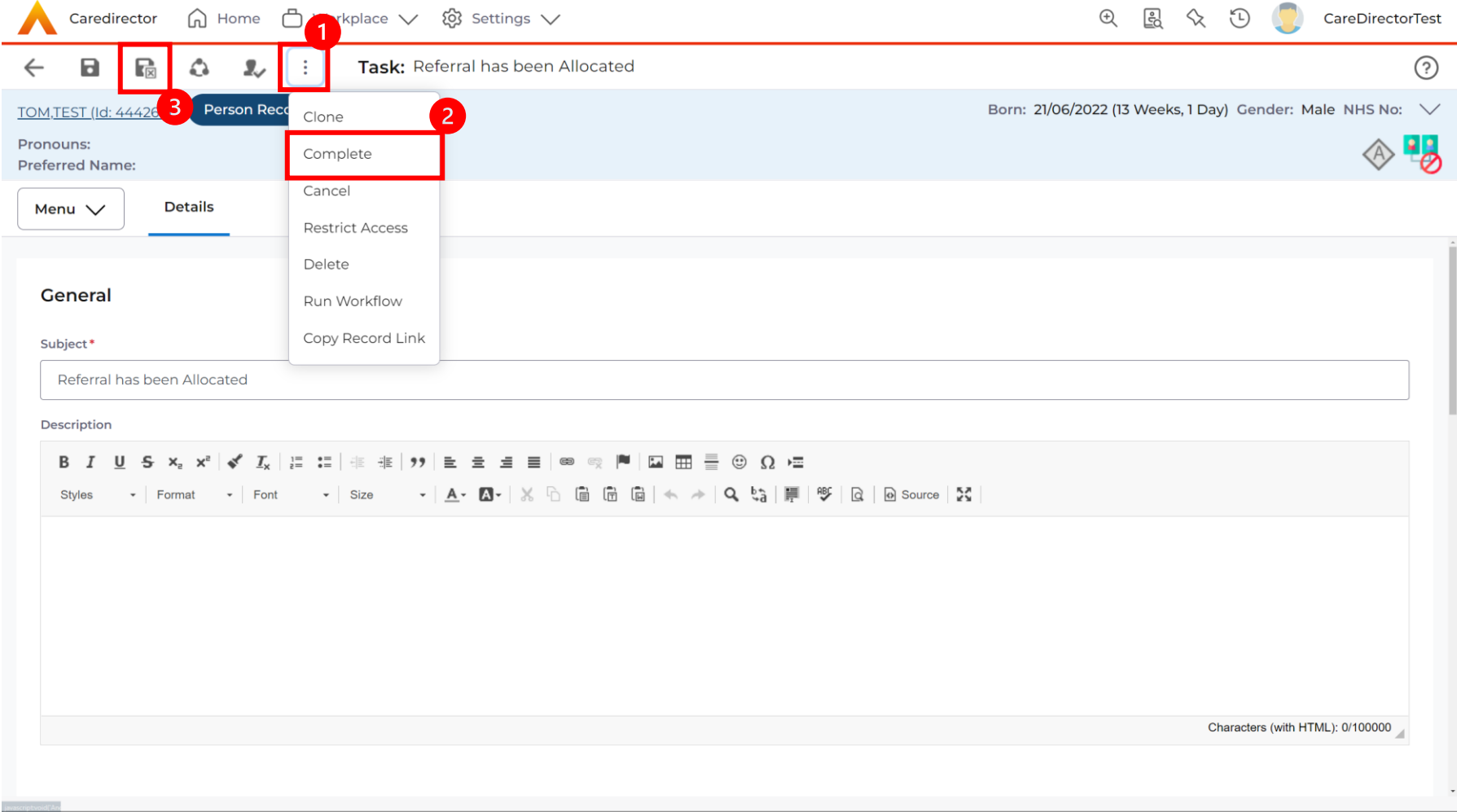
Menu Timeline Details

Tasks

Related Records Search for records

<input type="checkbox"/>	<u>Subject</u>	<u>Due</u> <input type="text"/>	<u>Status</u>	<u>Regarding</u>	<u>Reason</u>	<u>Responsible Team</u>	<u>Responsible User</u>
<input type="checkbox"/>	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom, TEST - (21/06/2022)...		CareDirectorTest	Scott Simpson

3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page**.



Closing a Case

- 1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.

The screenshot shows the CareDirector interface for a case record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail shows 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the patient information is displayed: 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Details' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tabs, the 'Assignment Information' section is visible. The 'Case Status*' dropdown menu is highlighted with a red box and a red circle containing the number '2', and it currently shows 'Assign To Team'. Other fields in the 'Assignment Information' section include 'Case Priority', 'Responsible User', 'Responsible Team*' (set to 'AMHP Coordinator'), and 'Review Date'.

2. Select the **Lookup** function next to the **Case Status** field.

Caredirector Home Workplace Settings

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

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Menu Timeline **Details**

Assignment Information

Case Status * **2**

Case Priority

Responsible User

Responsible Team *

Review Date

3. This will open a new window, to select a relevant option. Then select **OK**.

The screenshot shows the CareDirector interface with a modal window titled "Case Statuses". The modal contains the following elements:

- Header: "Case Statuses Enter your search criteria."
- Dropdown menu: "Look in" with "Social Care Case Status Lookup View" selected.
- Search bar: "Search" with "Search for records" and search icons.
- Table of status options:

	Name	Code	Gov C
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		
<input type="checkbox"/>	Closed		
<input checked="" type="checkbox"/>	Closed & Logged As Enquiry		
<input type="checkbox"/>	Closed as a Contact		
<input type="checkbox"/>	Closed Under Review		
<input type="checkbox"/>	Closure Request Rejected		
<input type="checkbox"/>	Closure Requested		
<input type="checkbox"/>	Enquiry led by other		

At the bottom of the modal, there are navigation controls for "Page 1" and "1 - 13". The "OK" button is highlighted with a red box.

- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot displays the CareDirector interface for a 'Person Record' of 'TOM, TEST (Id: 444267)'. The page title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is logged in as 'CareDirectorTest'. The 'Assignment Information' section is highlighted with a red box and contains the following fields:

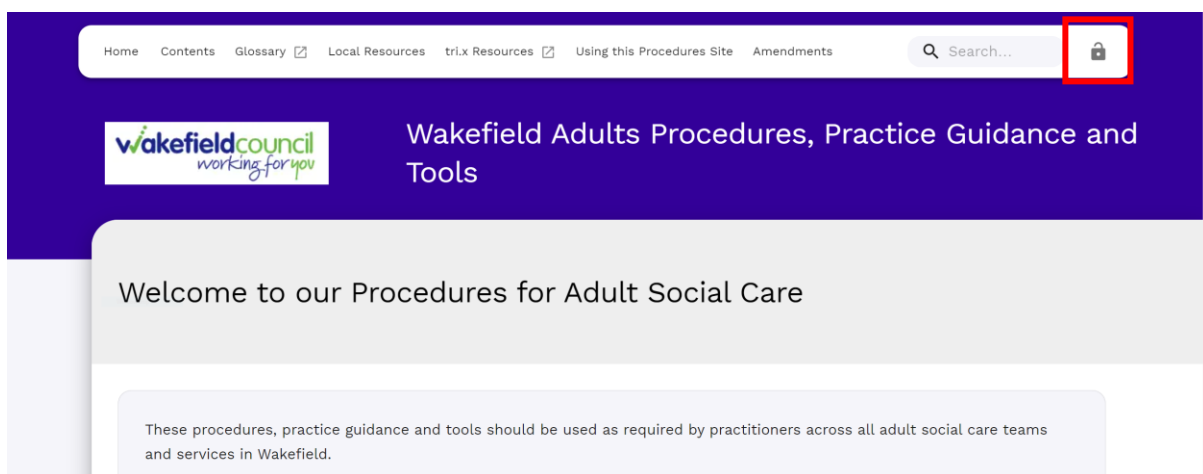
- Case Status***: Closed
- Case Priority**: (Empty)
- Responsible User**: (Empty)
- Responsible Team***: AMHP Coordinator
- Review Date**: (Empty)
- Last Assigned to Team Date**: 20/09/2022
- Close Date***: 03/10/2022 13:43
- Closure Reason***: All Work Completed
- Closure Accepted By***: Scott Simpson
- Archive Date***: 28/10/2022

Below the 'Assignment Information' section is the 'Other Information' section, which includes 'Re-Referral' and 'Non-Migrated Worker Name'.

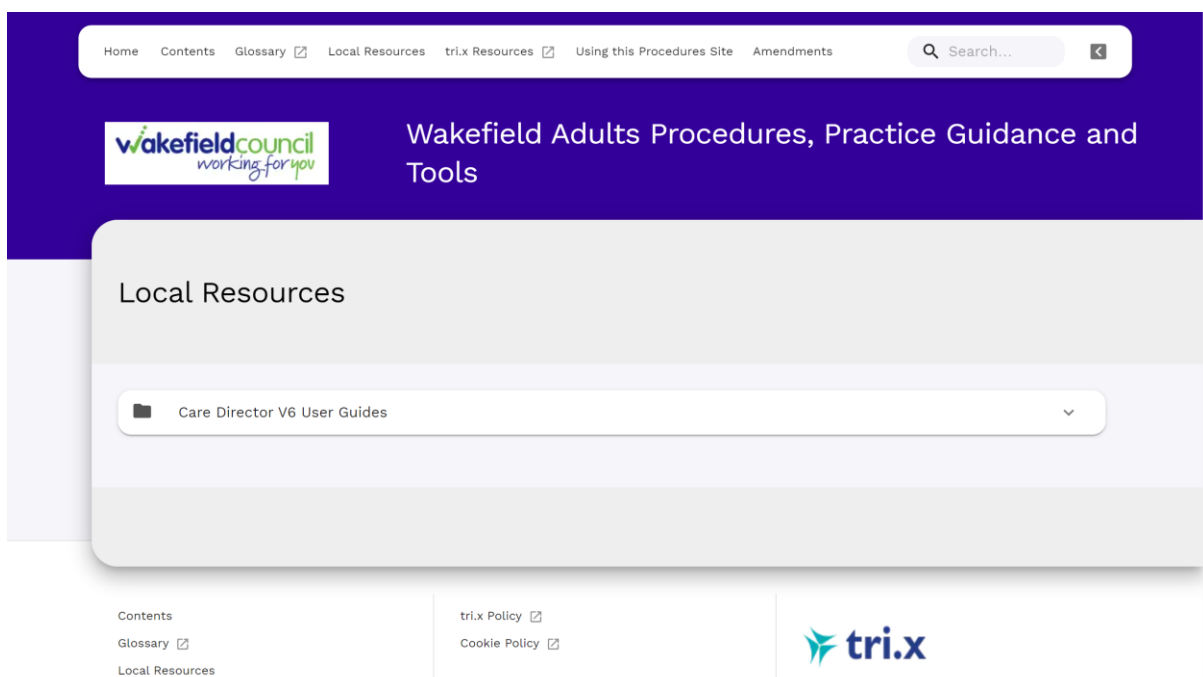
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

Further CareDirector Guidance

1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.
2. Go to **Microsoft Edge** and copy and paste this URL:
 - a. <https://wakefieldadults.proceduresonline.antser.com/>
3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	14/10/2022