



# Adult Safeguarding Team V1.0

**Document** CareDirector Adult Safeguarding Team.  
**Purpose** Adult Safeguarding Teams daily tasks on CareDirector.  
**Version** V1.0  
**Owner** ICT Business Transformation Team  
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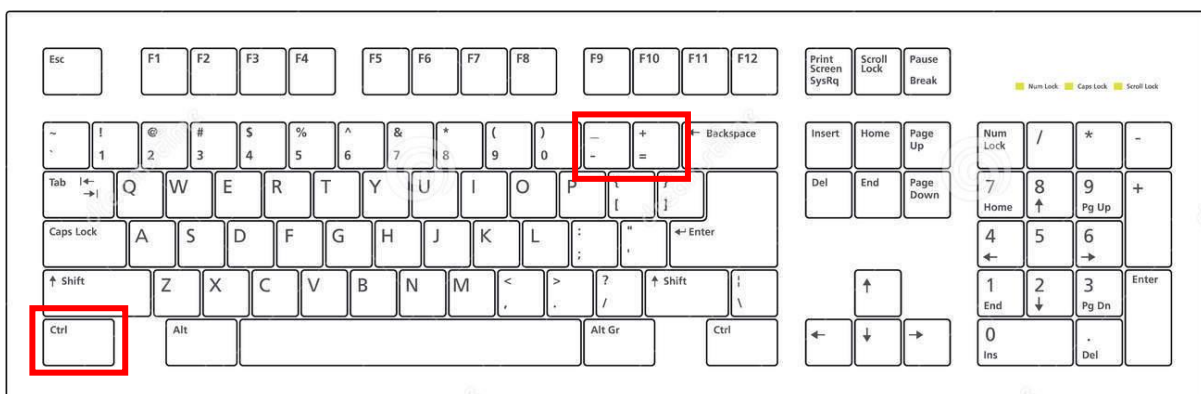
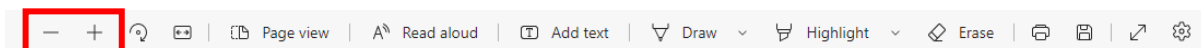
## Guide Information

### Before Live Access...

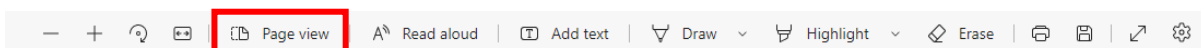
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### 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.

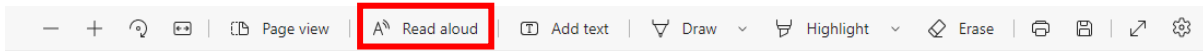


3. To put pages next to one another, select the **Page View** icon on the toolbar.

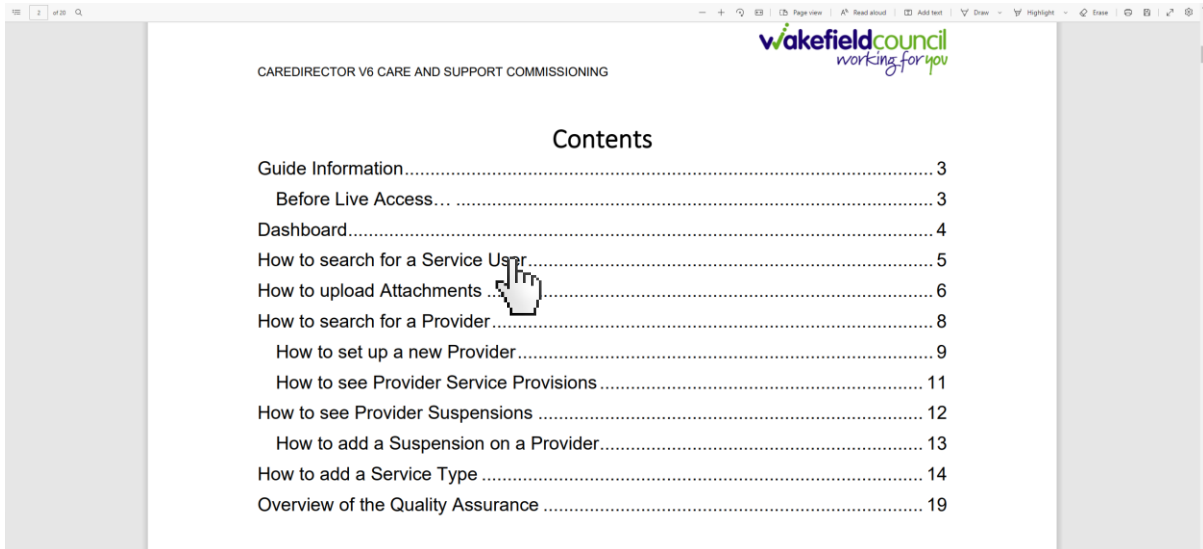




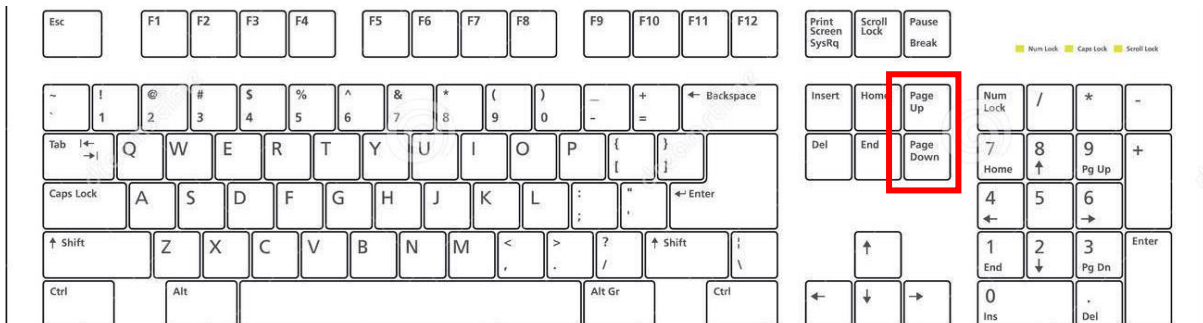
4. For auditory assistance, select **Read Aloud** from the toolbar.



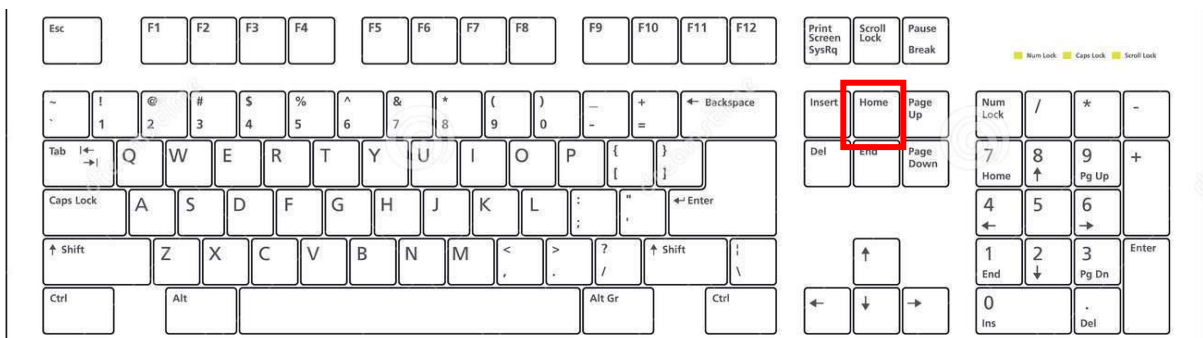
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

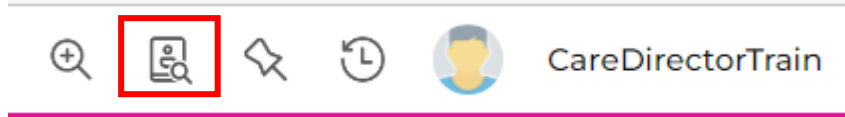


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## 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 October 2022 and September 2022, including 'Form (Case) Created', 'Service Provision Created', and 'Task Created'.

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

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

## How to 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', and 'Case Status'. The first three rows 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
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team

## How to create a Case

1. Locate the **Person Record** and under the tab **Cases**, select **Create New Record**.

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays 'Person: Tom MullenTest'. Below this, there are tabs for 'Person Record', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Cases' tab is highlighted with a red box and a circled '1'. In the 'Cases' section, a red box with a circled '2' highlights the '+' icon used to create a new case. Below the tabs, there is a search bar for records and a table of related records.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
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 circled '1'. The form is titled 'Details' and contains several sections for entering case information.

**Contact Details**

- Case No \***: [Empty text field]
- Person \***: Tom MullenTest
- Case Date/Time \***: 07/10/2022 (Date) 09:00 (Time)
- Initial Contact**: [Empty text field]
- Date/Time Contact Received \***: 06/10/2022 (Date) 11:00 (Time)
- Contact Received By \***: Scott Simpson
- Contact Reason \***: A - Adult Safeguarding
- Presenting Priority**: [Empty text field]
- Additional Information**: [Empty text area]
- Referral Reason**: [Empty text area]

## How to check the Case Status

1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**.  
When found, select it to open the **Case Record**.

Person: TEST Tom

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

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

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

2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case is Allocated, Closed Under Review, etc.**

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

Person Record

Menu Timeline **Details**

**Assignment Information**

Case Status \*  
Assign To Team

Case Priority

Responsible User

Responsible Team \*  
AMHP Coordinator

Review Date

Last Assigned to Team Date  
20/09/2022

## How to change the Case Status

1. On the **Case Status** field select the **Lookup** function and select the relevant **Case Status**.

The screenshot shows the 'Person Record' page for 'TOM.TEST (Id: 444267)'. The 'Details' tab is selected. Under 'Assignment Information', the 'Case Status\*' field is set to 'Assign To Team'. A red box labeled '1' highlights the 'Details' tab, and another red box labeled '2' highlights the magnifying glass icon next to the 'Case Status' dropdown menu.

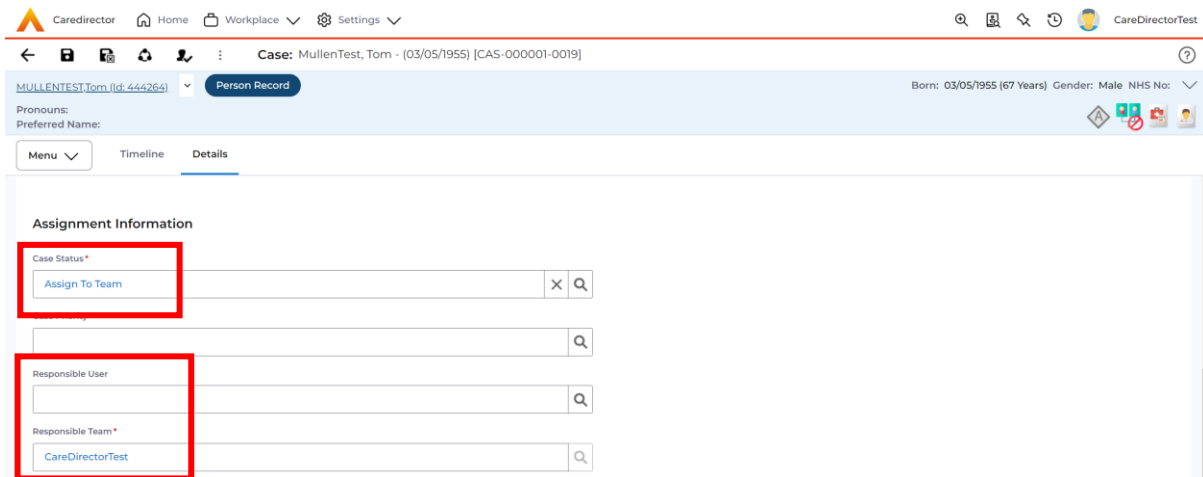
2. Choose the relevant option and select **OK** when found. Select **Save**.

The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search results table is highlighted with a red box and a '1' callout. The 'OK' button is highlighted with a red box and a '2' callout.

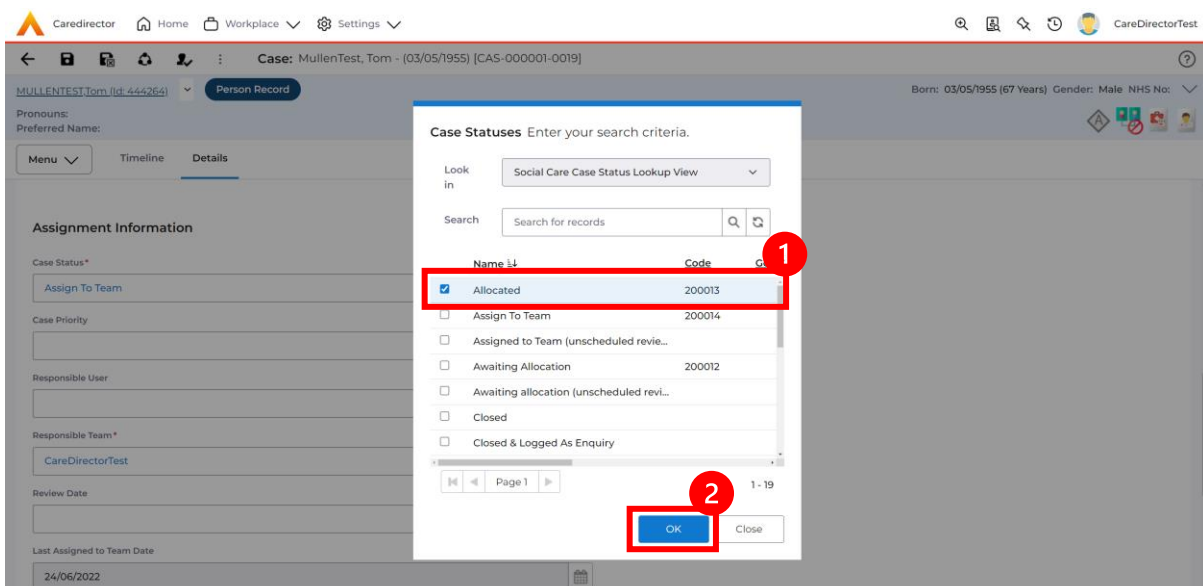
<input type="checkbox"/>	Name	Code	Gov C
<input type="checkbox"/>	Allocated	200013	
<input type="checkbox"/>	Assign To Team	200014	
<input type="checkbox"/>	Assigned to Team (unscheduled review)		
<input type="checkbox"/>	Awaiting Allocation	200012	
<input type="checkbox"/>	Awaiting allocation (unscheduled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

## How to Allocate a Case to a Worker

1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route**.
2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.



3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.
4. First select the **Lookup** function on the **Case Status** field and select **Allocate**. Then select **OK**.





- After, the **Responsible User** field will be mandatory. Use the **Lookup** function and select the **Responsible User** for this **Case**. When selected, select **OK**.

Responsible User\*

🔍

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

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

The background interface shows the 'Assignment Information' section with the 'Responsible User\*' field highlighted in blue.

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

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

- Case Status\*: Allocated
- Case Priority:
- Responsible User\*: Scott Simpson
- Responsible Team\*: CareDirectorTest
- Review Date:

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

## How to send a Case to another team

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

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

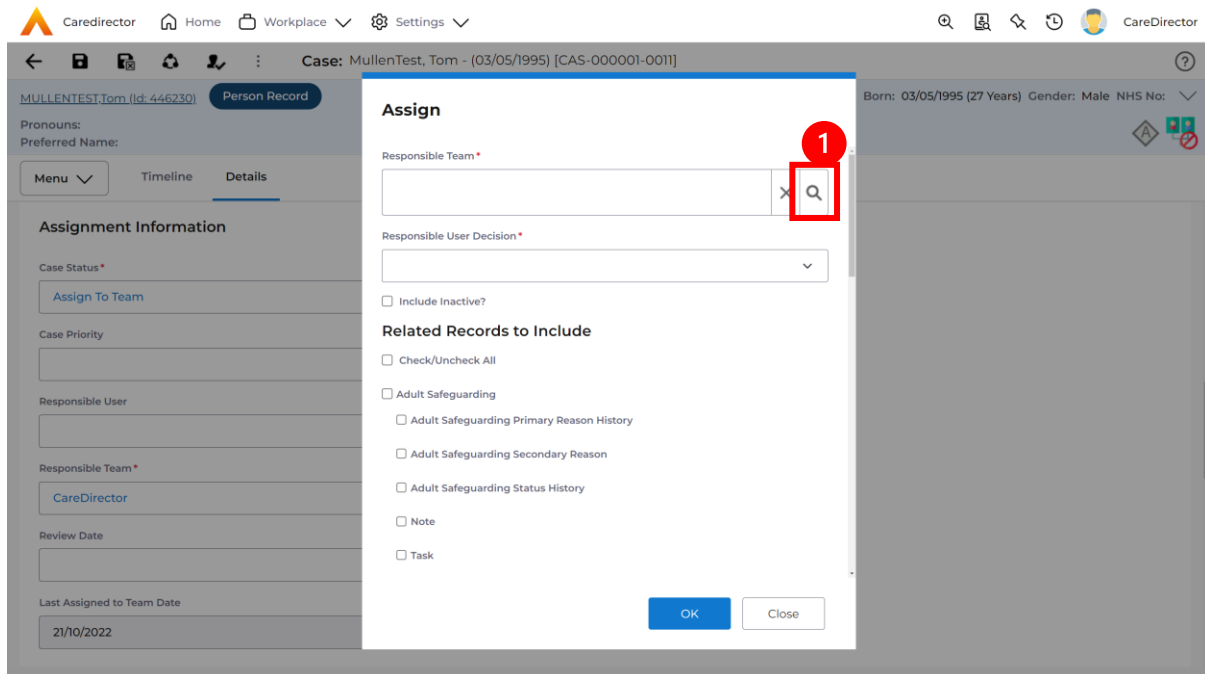
- Case Status \***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A text input field containing 'Scott Simpson'. A red box highlights this field with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

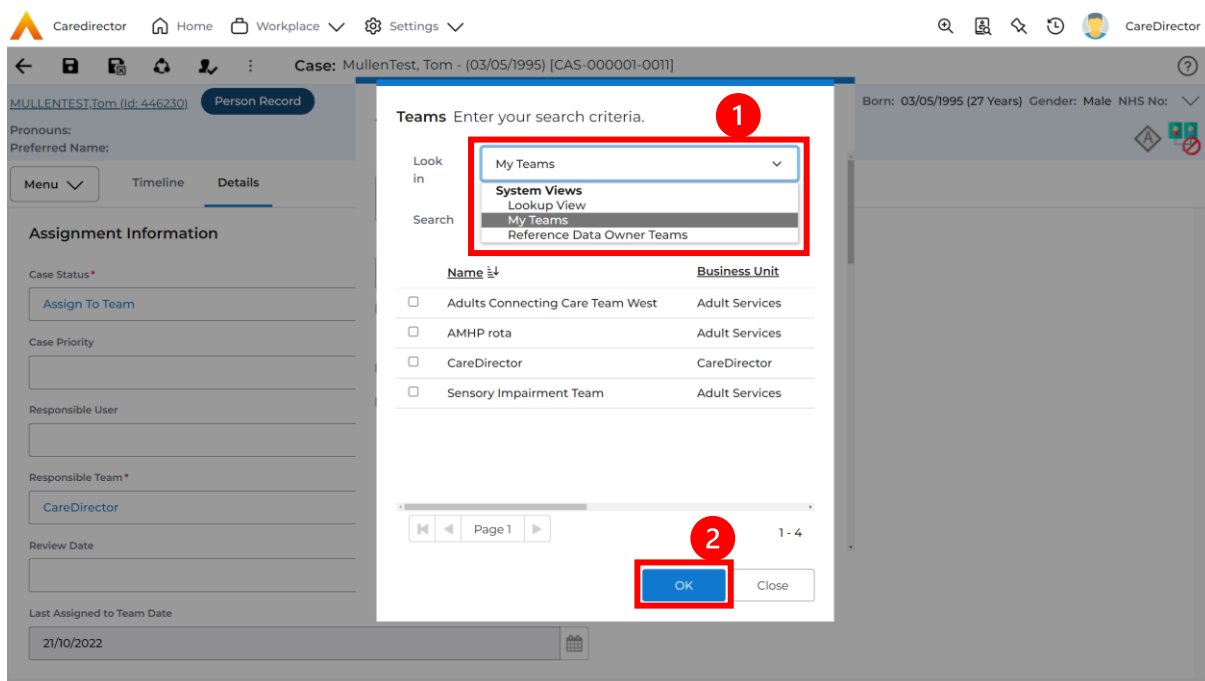
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- Case Status \***: A dropdown menu showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: An empty text input field with a search icon. A red box highlights this field with a '2' in a red circle.
- 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 CareDirector interface for a case named 'MullenTest, Tom'. A modal window titled 'Assign' is open, allowing for team and user assignment. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown is set to 'Do not change'. The 'Responsible User' field in the background is highlighted with a red box. The modal also includes options for 'Include Inactive?' and 'Related Records to Include'.

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

## How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.
2. Select **Menu**, **Care Network** select **Involvements**.

3. Within this screen, select **Create New Record** on the toolbar.

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Community Occupatio...	31/08/2022	3
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	30
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	
<input type="checkbox"/>	Matt Davies	* Secondary Wor...		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	3

- Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save**.

The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains the following fields:

- Case\***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team\***: CareDirectorTest
- Person\***: TEST Tom
- Involvement Member\***: Peter King
- Role\***: \* Secondary Worker (highlighted with a red box and a '2' in a red circle)
- Start Date\***: 04/10/2022 (highlighted with a red box and a '1' in a red circle)
- Involvement Reason**: (empty)
- Involvement Priority**: (empty)
- Involvement Status**: (empty)
- End Date**: (empty)
- Involvement End Reason**: (empty)
- Involvement Review Date**: (empty)

The 'Description' field is also present at the bottom of the form.

## 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

- 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.

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 '1'. Another red box with a '2' highlights the 'Menu' button itself.

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 '1'. Another red box with a '2' highlights the '+' icon in the toolbar.

Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
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'. The main header shows 'Case Note (For Case): New' and 'Person Record' for 'TOM.TEST (id: 444267)'. The 'Details' section contains several form fields: 'Case \*' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Responsible Team \*' (CareDirectorTest), 'Reason', 'Priority', 'Date \*', 'Status \*' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'. A red box highlights the 'Responsible User' field, and a red circle with the number '1' is next to it. Another red box highlights the 'Save' icon in the top navigation bar, with a red circle and the number '2' next to it.

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

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

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

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

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

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

## 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**.

The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, a breadcrumb trail shows 'Task: CHC Funding Decision - Fully funded'. The main header area includes 'TOM.TEST (id: 444276)' and 'Person Record'. The 'Regarding' field is highlighted with a red box and a red circle with the number '2'. The field contains a folder icon and the text 'Tom, TEST - (24/07/1950) [CAS-000001-0018]'. A red circle with the number '1' is also present near the 'Details' tab.

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**.

The screenshot shows the CareDirector interface with a 'View' dialog box open. The dialog box displays 'Contact Details' for 'Case Tom, TEST - (24/07/1950) [CAS-000001-0018]'. The 'View' button is highlighted with a red box and a red circle with the number '2'. The dialog box contains the following information:

- Case No: CAS-000001-0018
- Person: TEST Tom
- Case Date/Time: 24/06/2022 00:00
- Initial Contact: --
- Date/Time Contact Received: 24/06/2022 00:00
- Contact Received By: --

## How to Allocate a new Activity to another team

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

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

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

The screenshot shows the 'Task: New' form with a 'Teams' lookup dialog box open. The dialog box has three red circles: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The 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 user profile 'CareDirector' is visible in the top right. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom (Id: 446230)'. The form includes fields for '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 also radio buttons for 'Contains Information Provided By A Third Party?' and 'Is Case Note?'. A red box with a '1' highlights the 'X' icon next to the 'Responsible User' field, and another red box with a '2' highlights the 'X' icon next to the 'Regarding' field.

## How to Allocate an existing Activity to another team

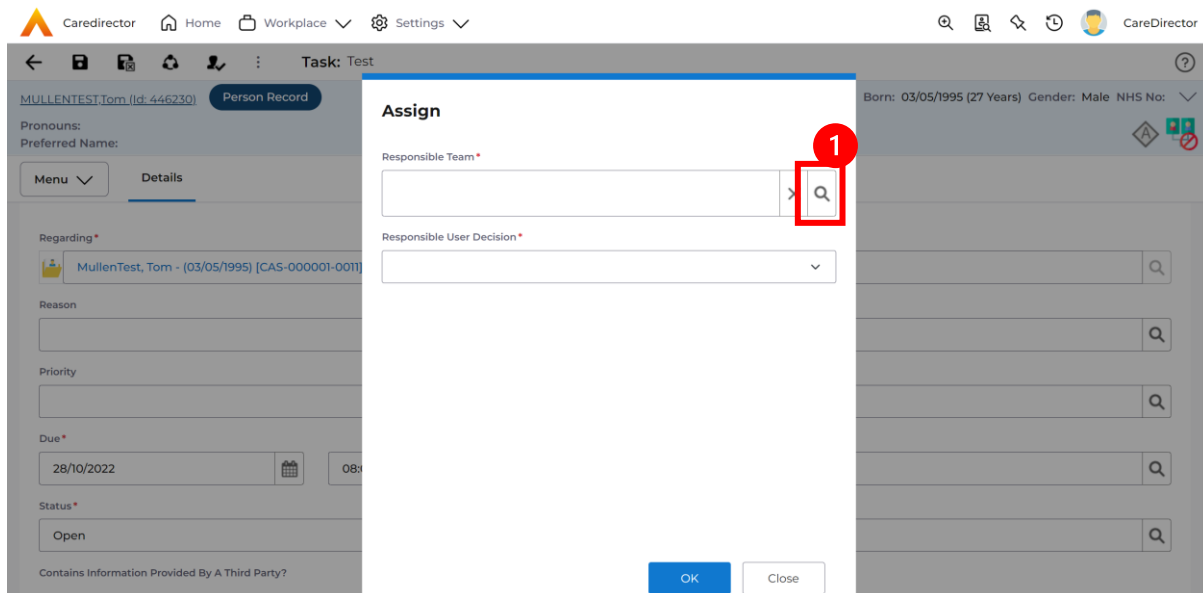
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main content area is titled 'Details' and contains several fields: 'Regarding' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Responsible Team' (Sensory Impairment Team), 'Reason', 'Responsible User' (Scott Simpson), 'Priority', 'Category', 'Due' (28/10/2022, 08:00), 'Sub-Category', 'Status' (Open), and 'Outcome'. A red box highlights the 'Responsible User' field, and a red circle with the number '1' is placed over the 'X' icon in the field's dropdown menu.

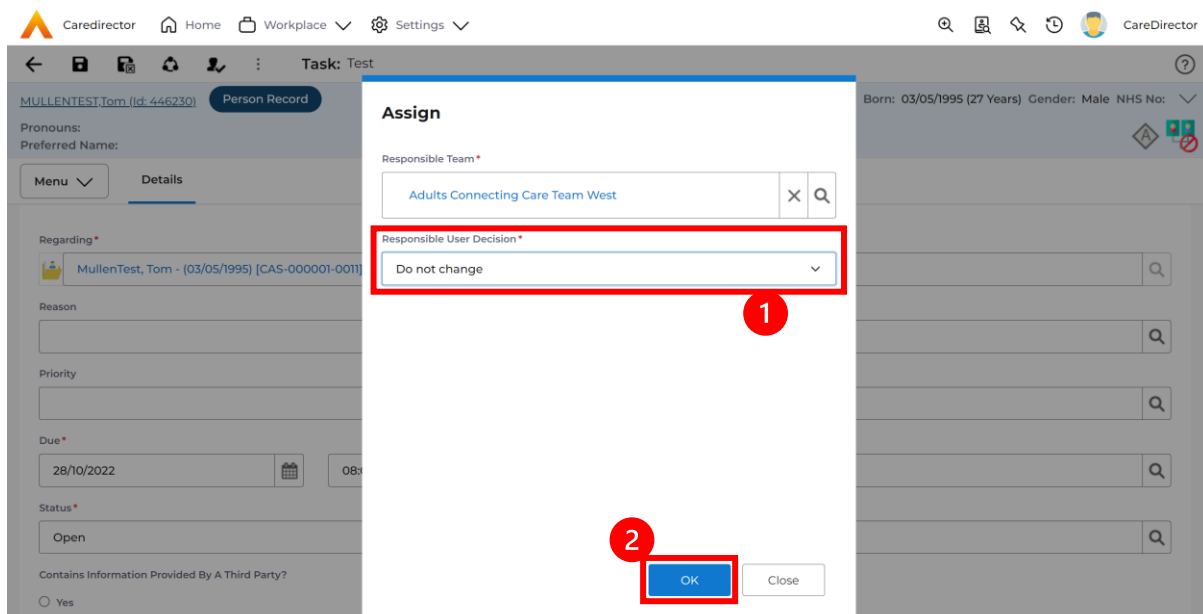
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for the same task. The top navigation bar is the same. The task title is 'Task: Test'. The main content area is titled 'Details' and contains the same fields as the previous screenshot. A red box highlights the 'Assign' icon in the toolbar, and a red circle with the number '1' is placed over it.

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



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

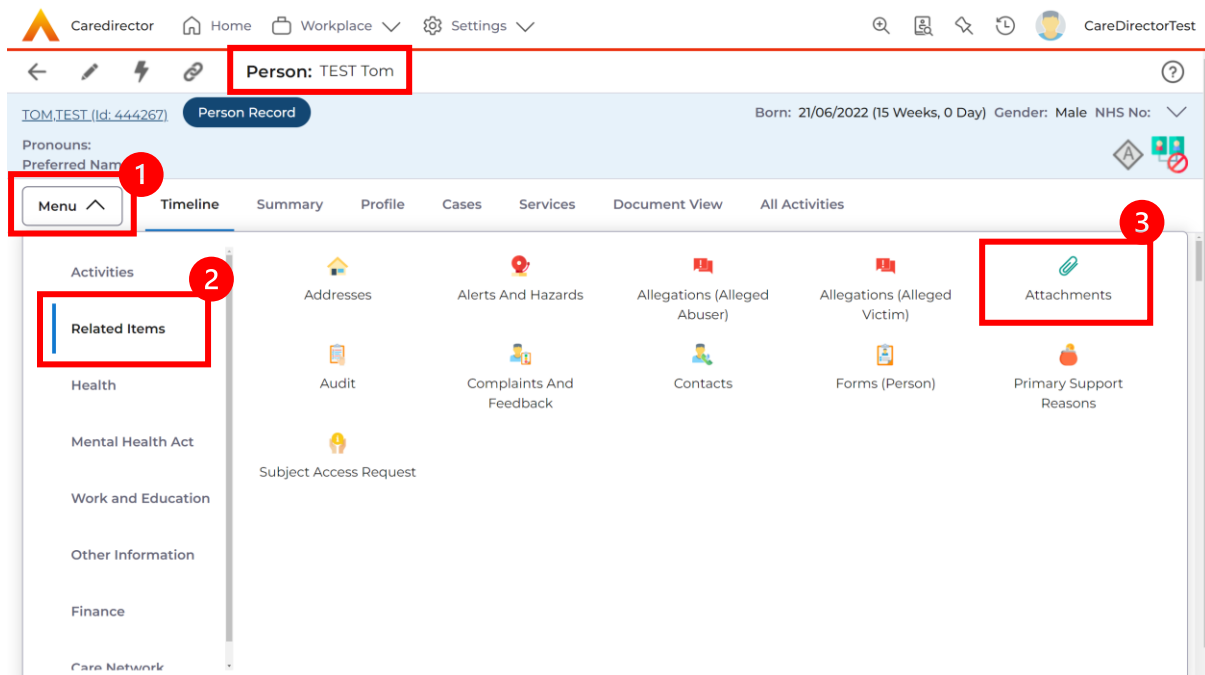


- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

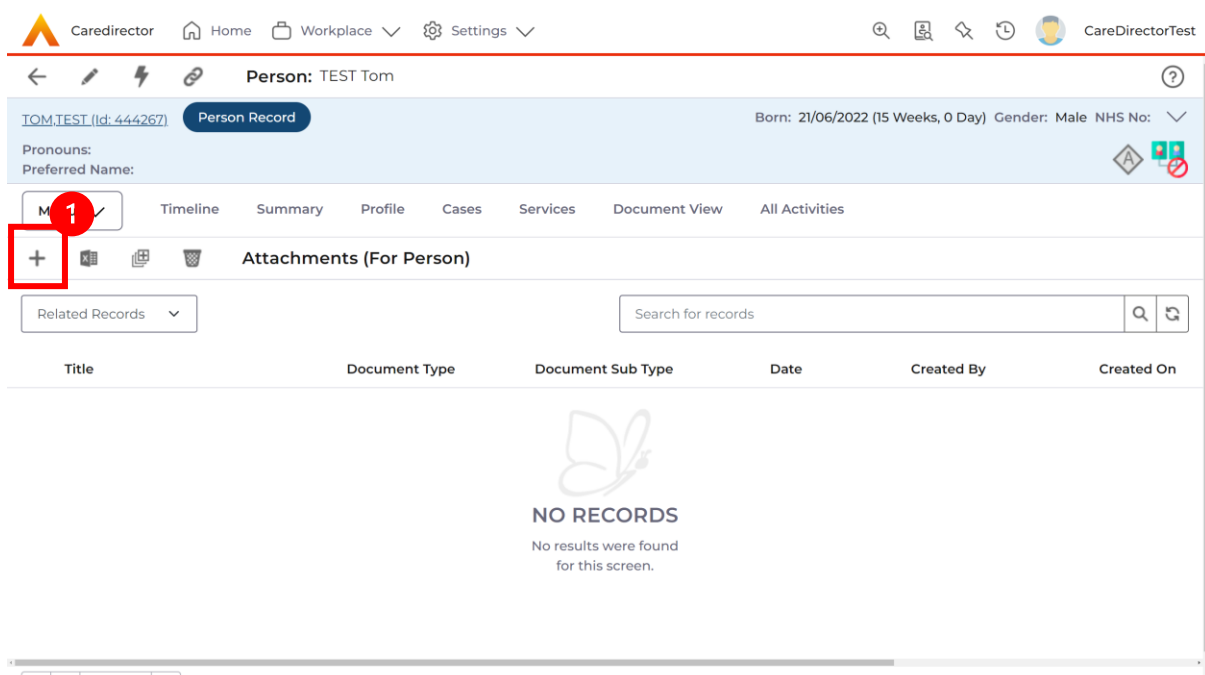


## How to upload Attachments

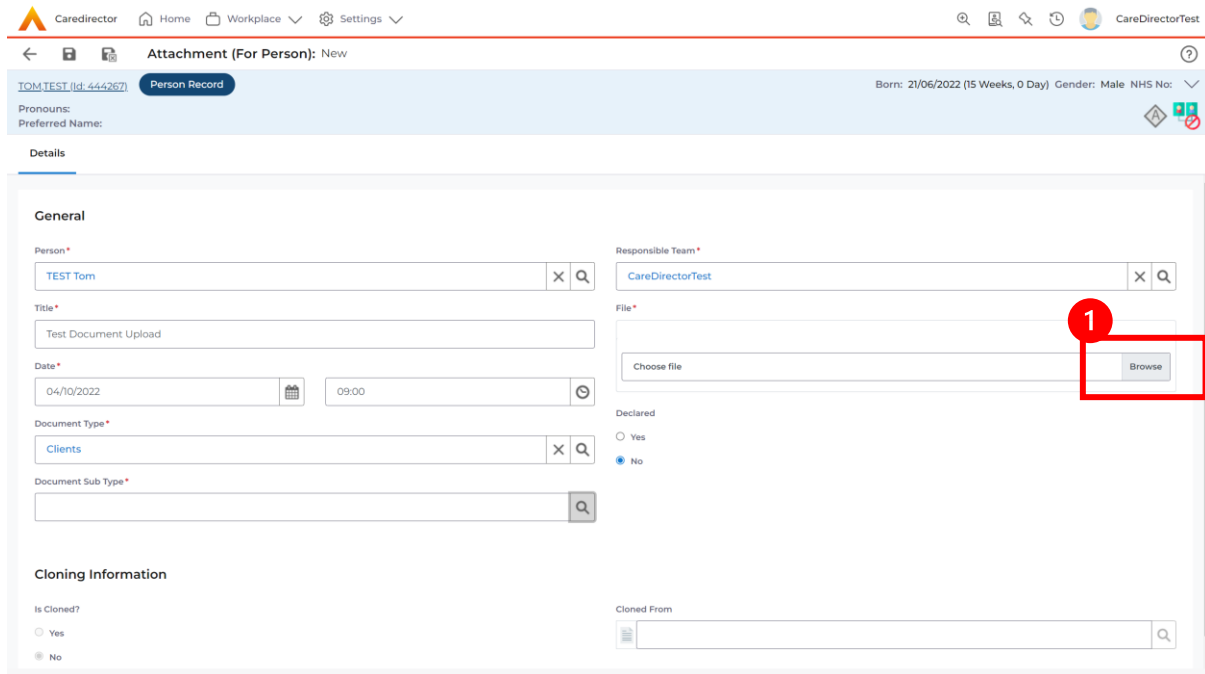
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu**, **Related Items** and then select **Attachments**.



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

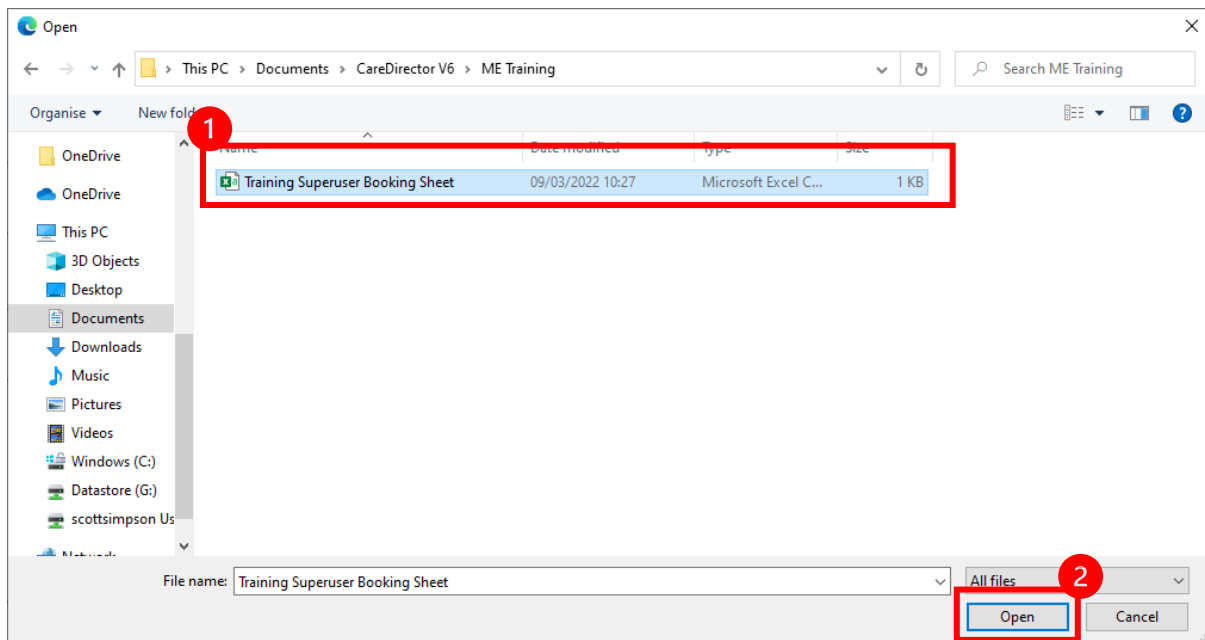


3. Fill in the mandatory fields. When finished, select the **Browse** button in the **File** field.



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

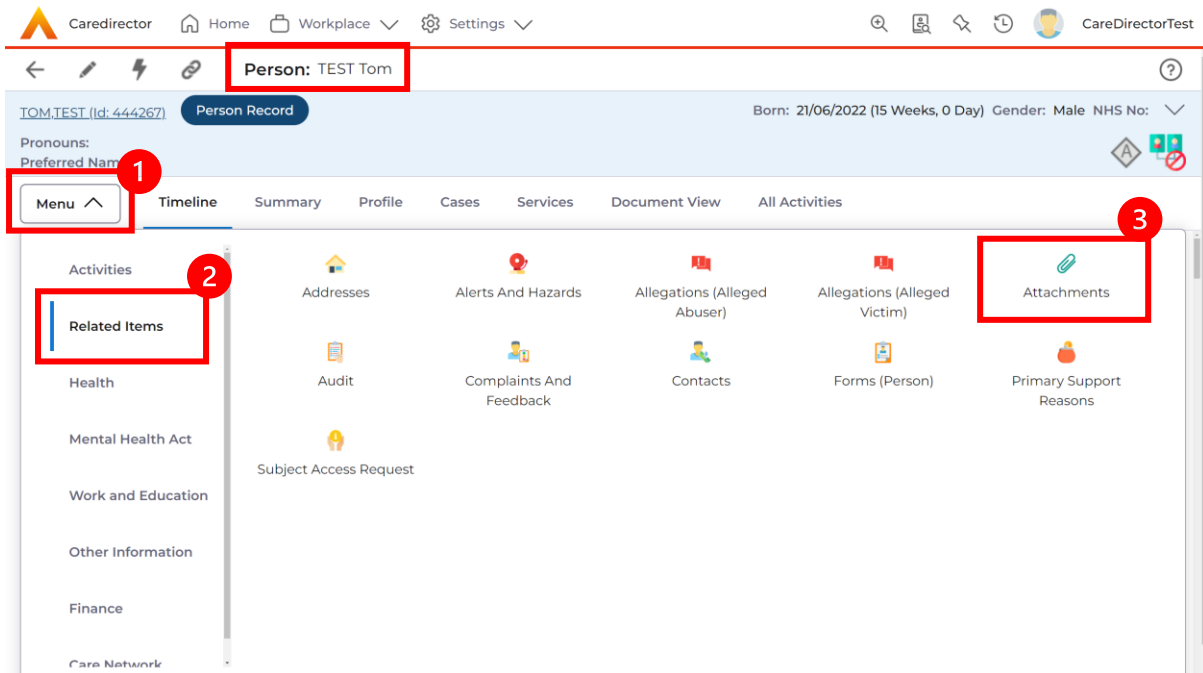
4. Select a **File** from your computer/ SharePoint and select **Open**.



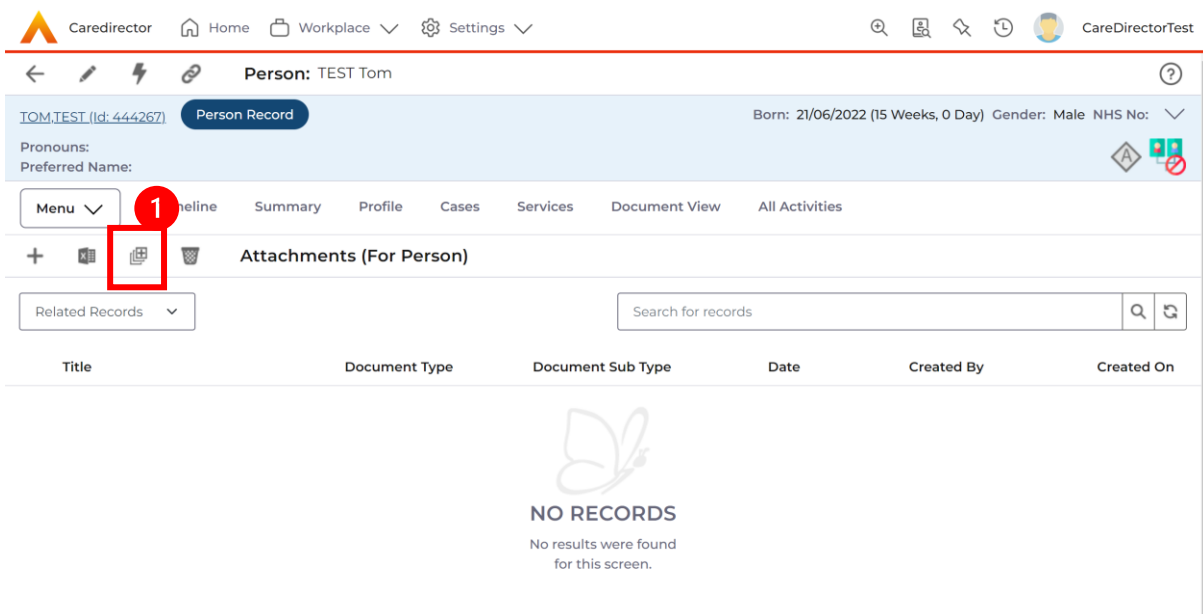
5. After uploading, the file name will appear and then select **Save** from the toolbar.

## How to upload multiple attachments

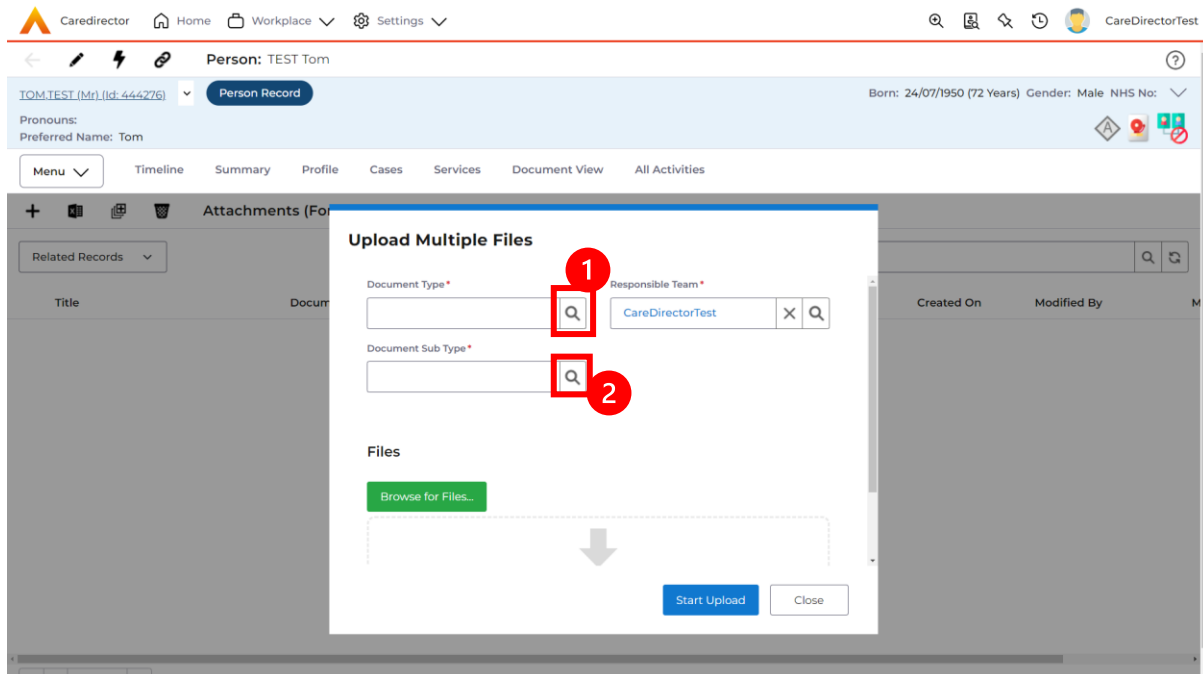
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



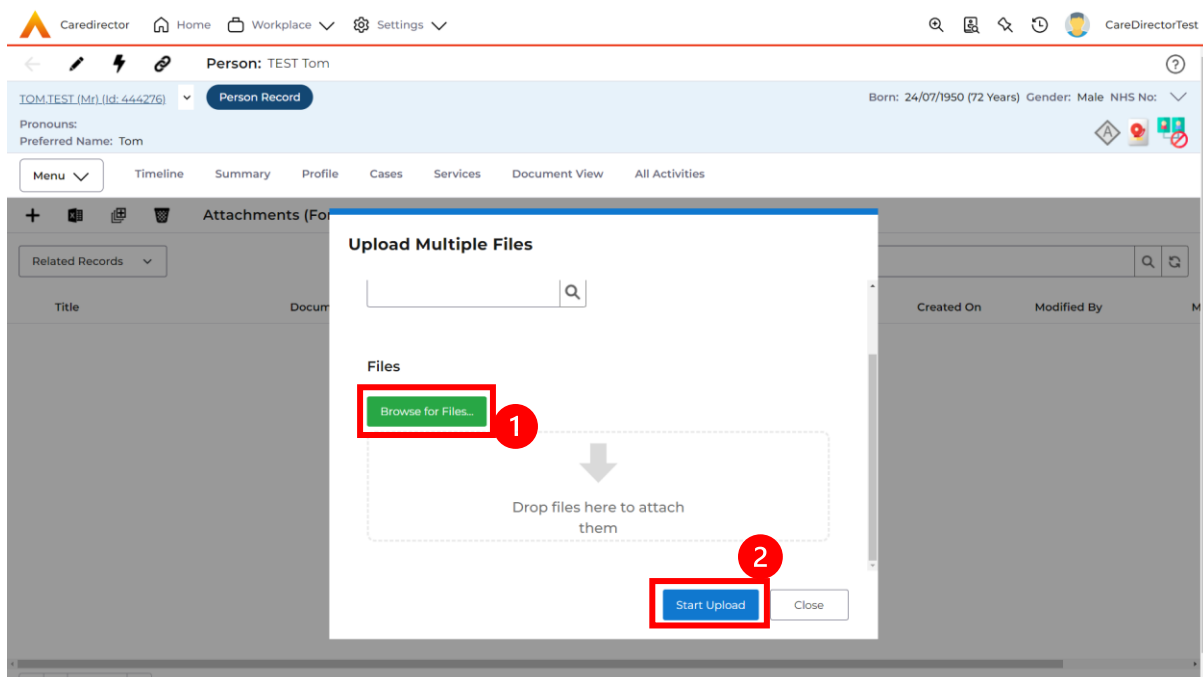
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 an Adult Safeguarding Module

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

The screenshot displays the CareDirector interface for a case titled "Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]". The user is logged in as "CD V6 Team". The interface shows a navigation menu with "Menu" selected (indicated by a red box and a red circle with the number 1). Below the menu, the "Related Items" section is expanded (indicated by a red box and a red circle with the number 2), and the "Adult Safeguarding" module is highlighted (indicated by a red box and a red circle with the number 3). The interface also shows a "Form (Case) Updated" notification from Scott Simpson, indicating a status change from 'In Progress' to 'Closed'.

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

## How to create an Adult Safeguarding Module

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

The screenshot shows the Caredirector interface for a case. At the top, there are navigation links for Home, Workplace, and Settings. The case title is "Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]". Below the case title, there is a "Menu" button circled in red with a "1". The "Menu" is open, showing a grid of options. "Related Items" is circled in red with a "2", and "Adult Safeguarding" is circled in red with a "3". Below the menu, there is a notification: "Form (Case) Updated" by Scott Simpson, changing status from 'In Progress' to 'Closed'.

2. From this screen, select **Create New Record** from the toolbar.

The screenshot shows the Caredirector interface for a case. At the top, there are navigation links for Home, Workplace, and Settings. The case title is "Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]". Below the case title, there is a "Menu" button circled in red with a "1". The "Menu" is open, showing a grid of options. "Adult Safeguarding" is circled in red. Below the menu, there is a search bar and a table with columns: Primary Reason, Start Date, End Date, End Reason, Created On, and Created By. The table is empty, showing "NO RECORDS".

3. Fill in the required fields and enter as much information as you know. When finished select **Save**.

Caredirector
 Home
Workplace
Settings

CD V6 Team

←
🔒
📄
Adult Safeguarding: New
?

TOM,TEST (id: 444267)
Person Record

Born: 21/06/2022 (20 Weeks, 3 Days)
Gender: Male
NHS No: ▾

Pronouns:

🏠
🚫
👤

Details

### General

**Case \***

**Supported by advocate, family or friend**

**Responsible Team \***

**Results of actions taken for risk mgmt.**

**Responsible User \***

**Status \***

**Start Date \***

**Conclusion**

**End Date**

**Deprivation of Liberty**

 Yes
  No

**Primary Reason \***

**Discussed with Person**

 Yes
  No

**End Reason**

**Person Views**

### Mental Capacity

**Has mental capacity to participate in the process?**

**Date of assessment**

### ALLEGATIONS

#### Making Safeguarding Personal

**Asked what their outcomes were?**

**Desired outcomes achieved?**

#### Safeguarding Adults Review

**Safeguarding Review**

**Serious Harm**

## How to input Allegations for an Adult Safeguarding Module

1. Locate the **Adult Safeguarding Module** that you would like to input the **Allegation** on. Then select the **Plus** on the **toolbar** of **Allegations**.

The screenshot shows the CareDirector interface for an adult safeguarding case. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail is 'Adult Safeguarding: Adult Safeguarding within Case Tom, TEST - (21/06/2022) [CAS-000001-0010] cre...'. The case details include 'TOM, TEST (id: 444267)', 'Person Record', 'Born: 21/06/2022 (20 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. The 'General' section contains various fields for case information, such as 'Case\*', 'Responsible Team\*', 'Responsible User\*', 'Start Date\*', 'End Date', 'Primary Reason\*', 'End Reason', 'Supported by advocate, family or friend', 'Results of actions taken for risk mgmt.', 'Status\*', 'Conclusion', 'Deprivation of Liberty', 'Discussed with Person', and 'Person Views'. The 'Mental Capacity' section includes 'Has mental capacity to participate in the process?' and 'Date of assessment'. The 'ALLEGATIONS' section is currently empty, displaying a 'NO RECORDS' message. A red box highlights the '+' icon in the 'ALLEGATIONS' toolbar, with a red circle containing the number '1' next to it.



## 2. Enter in the details and when finished select **Save**.

Caredirector Home Workplace Settings CD V6 Team

Allegation: New

Details

### General

Alleged Victim \*  
TEST Tom

Alleged Abuser \*  
[Search]

### Allegation Details

Allegation Date \*  
[Calendar]

Association \*  
Community Health Care - Known to Individual

Associated Provider  
[Search]

Part of a Larger Investigation  
 Yes  
 No

Responsible Team \*  
CareDirectorTest

### Abuse Details

Primary Category of Abuse \*  
Financial Abuse

Primary Place of Alleged Abuse \*  
Hospital

Secondary Categories of Abuse  
[Search]

Other Place of Alleged Abuse  
[Search]

Abuse Date From  
[Calendar]

Abuse Date To  
[Calendar]

Normal Place of Residence \*  
Hospital

Abuse Details  
[Text Area]

### Allegation Outcome

Related Safeguarding Record  
Adult Safeguarding within Case Tom, TEST - (21/06/2022) [CAS-0000...]

Outcome  
[Search]

Outcome Details  
[Text Area]

### POLICE DETAILS

#### Decision to Notify Police

Should the Police be Notified?  
 Yes  
 No

Reason for Decision  
[Text Area]

## 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 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box and a '1'. The 'Menu' dropdown is highlighted with a red box and a '2', and the 'Related Items' option is selected. The 'Forms (Case)' option in the main navigation bar is highlighted with a red box and a '3'. The timeline 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 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is visible. The 'Forms (Case)' section is active, showing a search bar and a table of related records. The table has columns for Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date.

<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

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 [dropdown] Timeline Summary Profile **Cases** Services Document View All Activities

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

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

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

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

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

Pronouns: [dropdown]  
Preferred Name: [dropdown]

Menu [dropdown] Timeline Details

Activities [dropdown] 2 Actions Adult Safeguarding Attachments Audit Deprivations Of Liberty **Forms (Case)** 3 Involvements

Other Information [dropdown] Involvements History Joint Case Members Status History

Team [input] [search icon]

Profession Type [input] [search icon]

Reset Refresh Apply

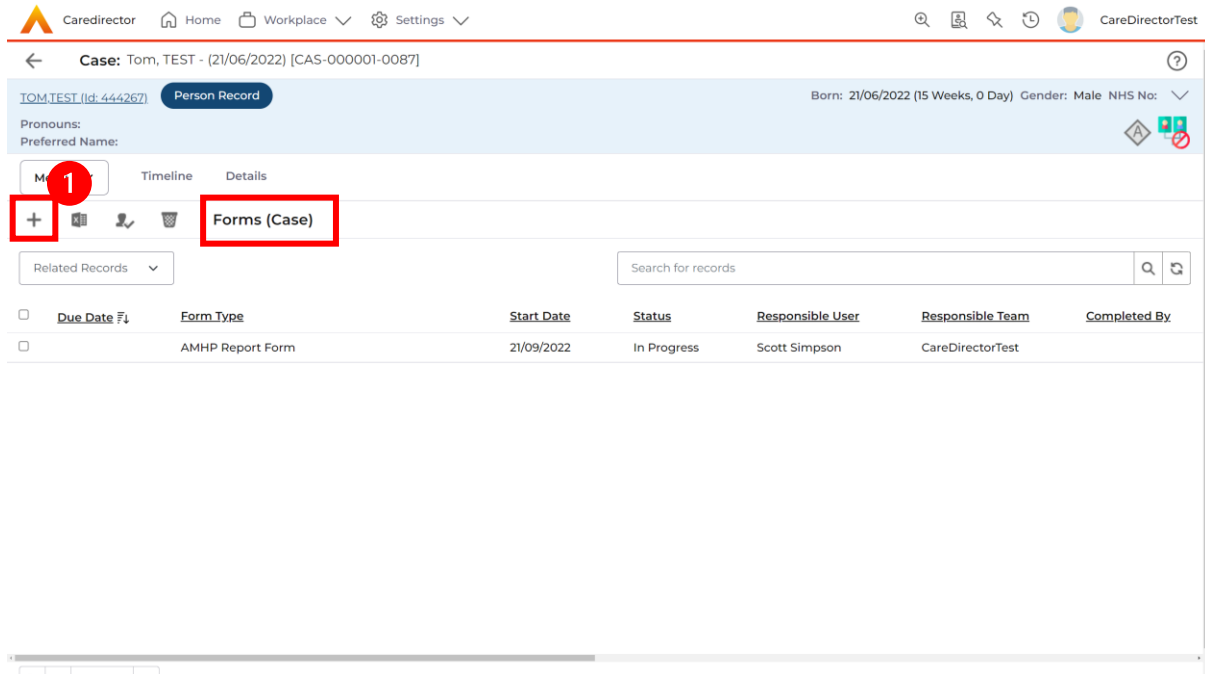
**Form (Case) Created** 21/09/2022 13:04:25  
A new record of form (case) was created by Scott Simpson.

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

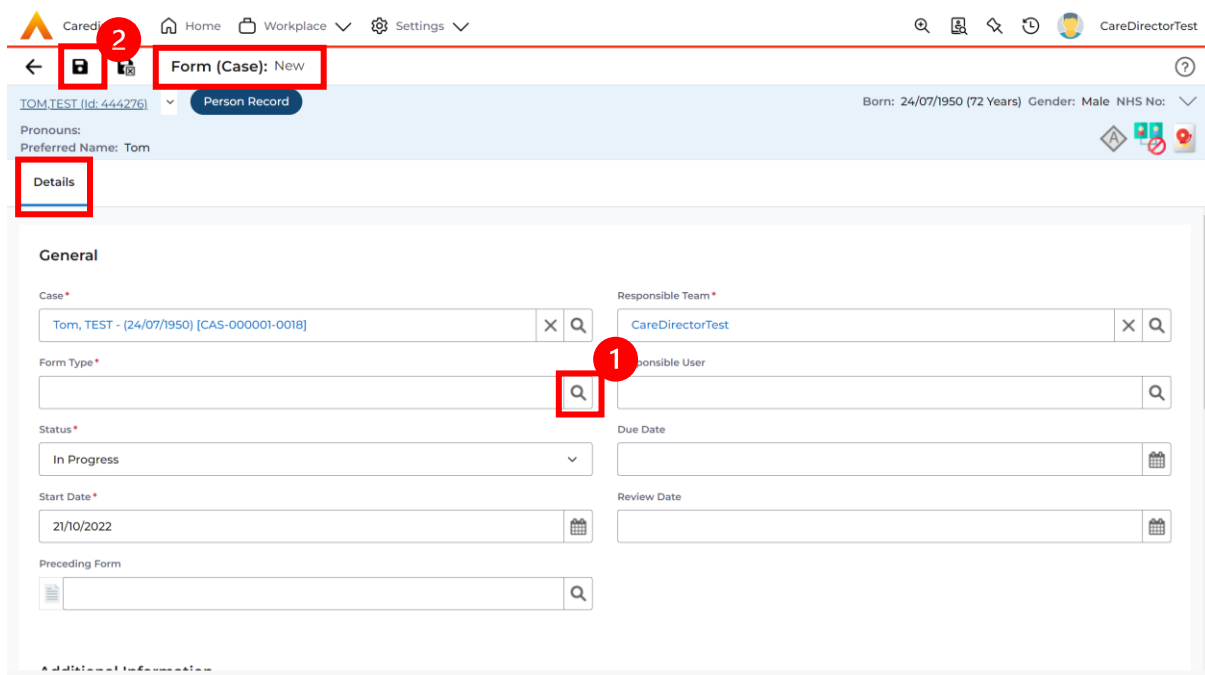
**Case Involvement Updated** 21/09/2022 12:23:12  
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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

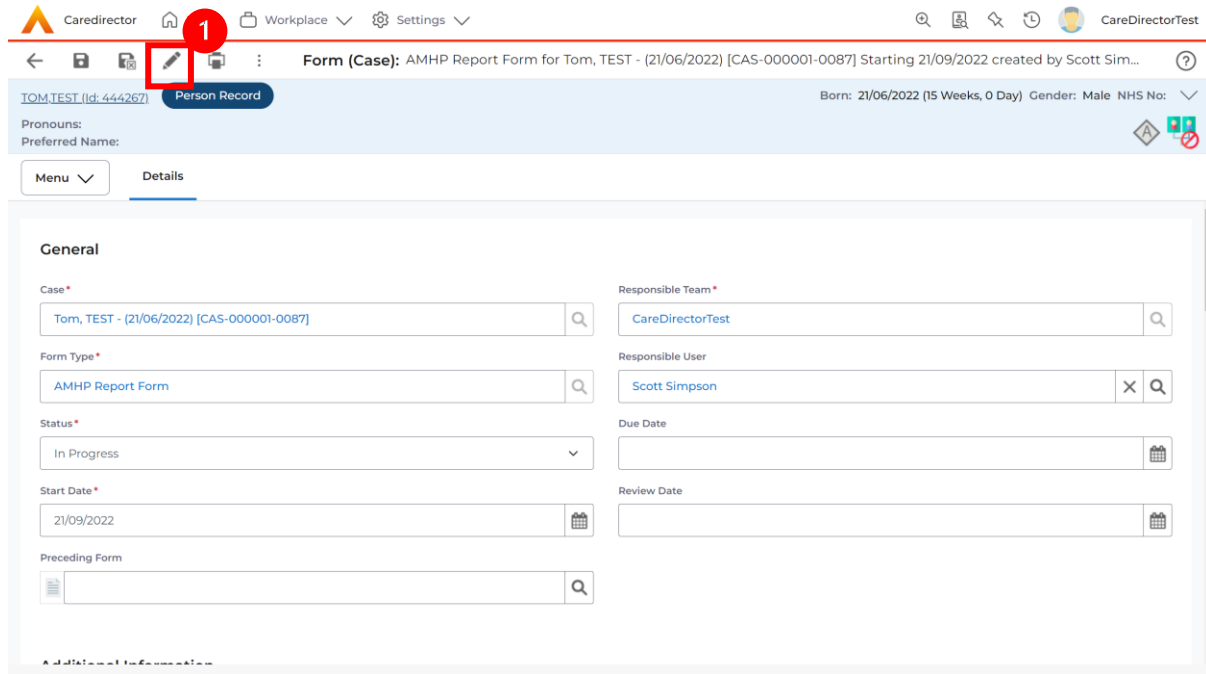
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



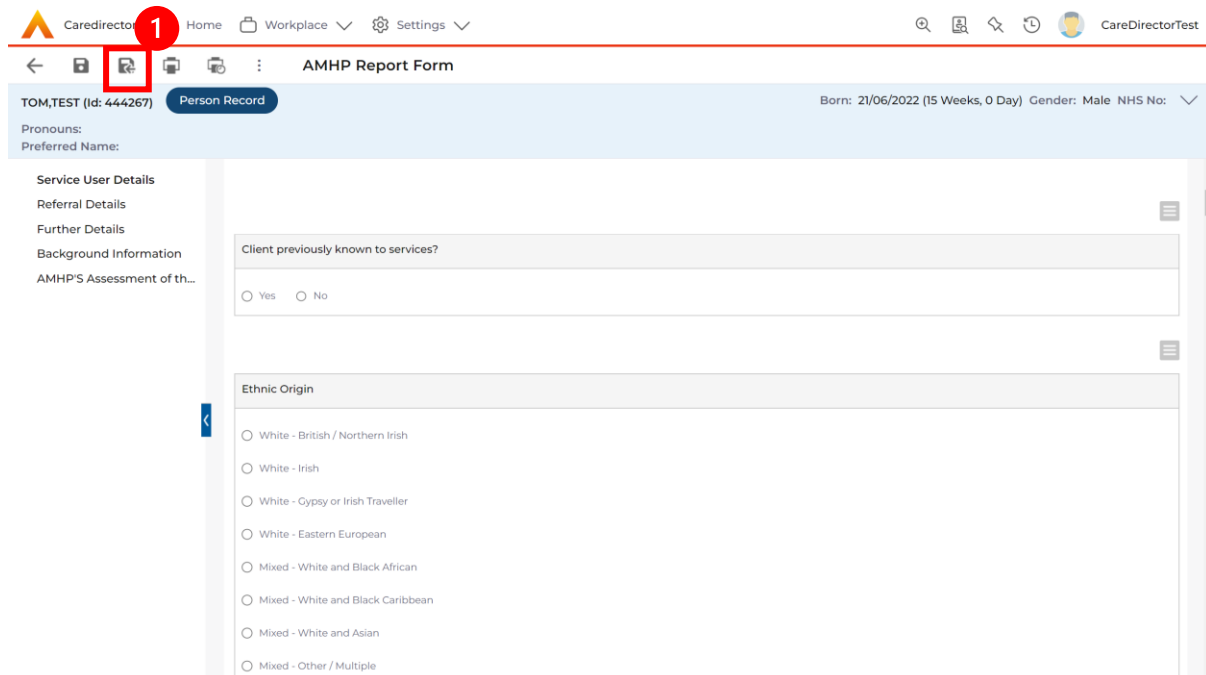
4. Once inside the **Details**. This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type**. When finished, select **Save**.



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.

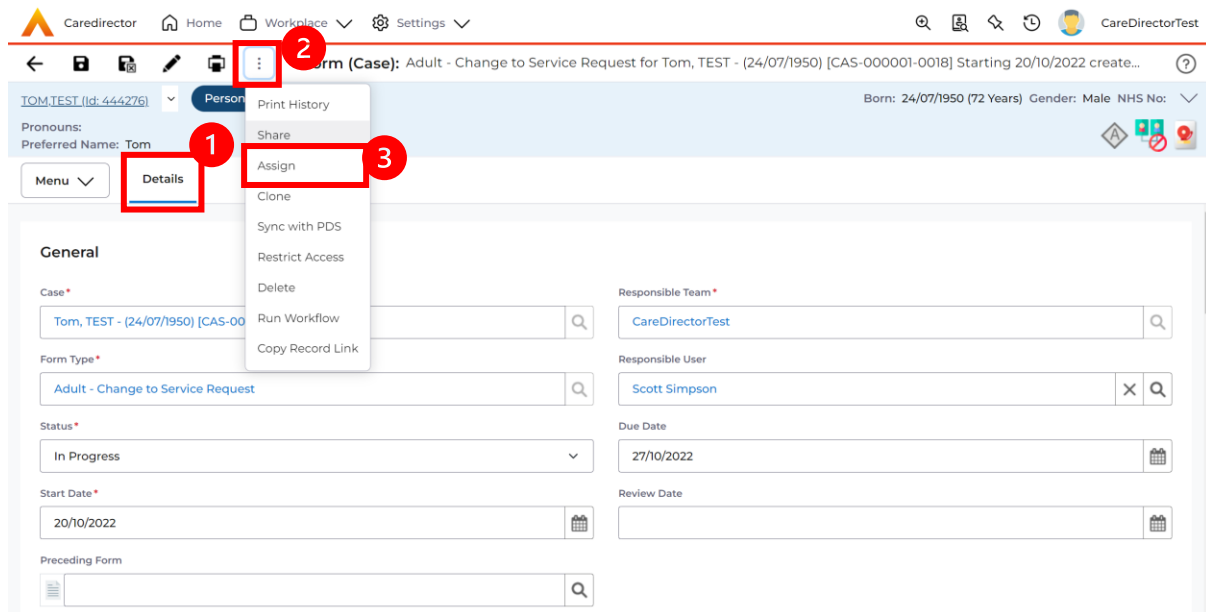


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

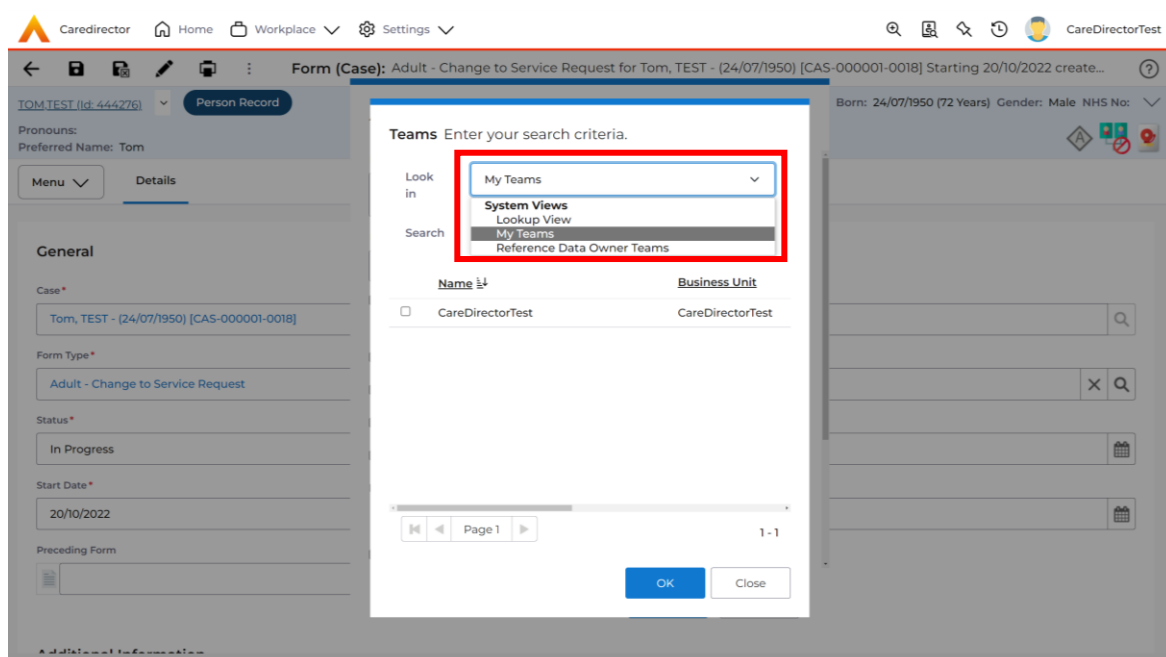


## How to Allocate a Form

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 CareDirector software interface. The main window displays a case record for 'Tom, TEST - (24/07/1950)'. The 'Assign' dialog box is open, showing the following details:

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

The 'OK' button is highlighted with a red box.

## 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 navigation at the top indicates the case: "Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]". Below this, the "Menu" dropdown is open, and the "Related Items" option is selected. The "Forms (Case)" option is highlighted with a red box and a red circle with the number 3. The main content area displays a timeline of events related to the case, including "Form (Case) Created", "Case Involvement Updated", and "Case Involvement Created".

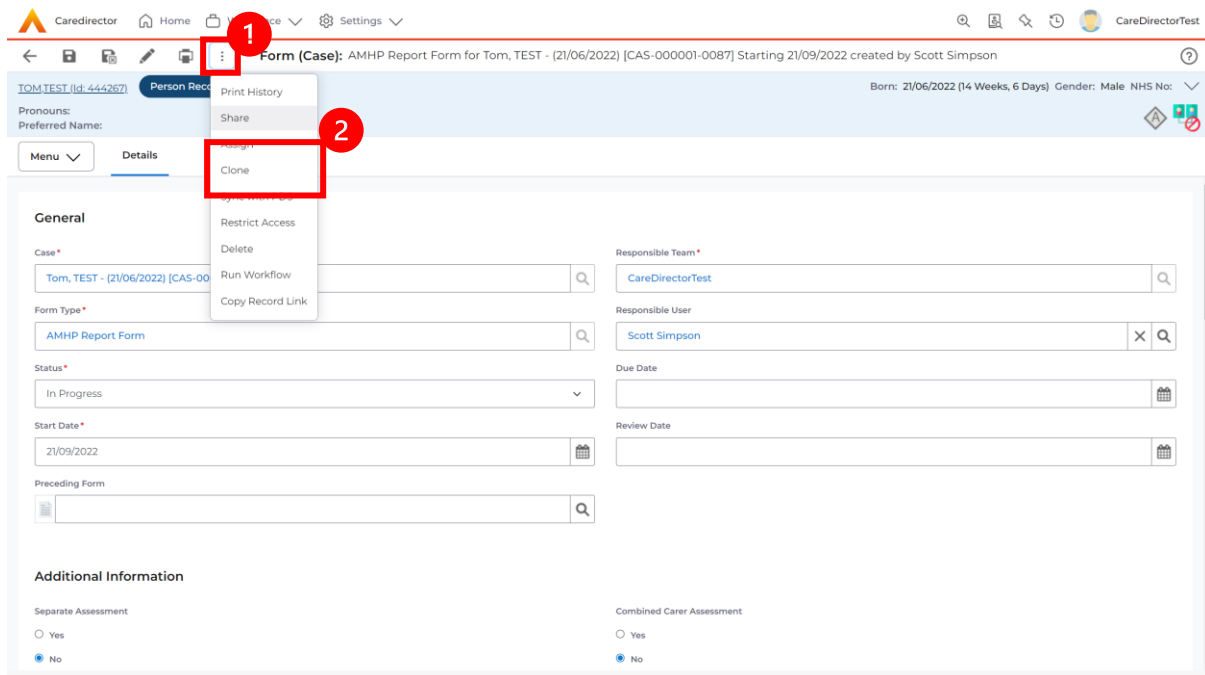
2. Select the relevant for **Form** to open.

The screenshot shows the CareDirector interface for the same case record. The "Forms (Case)" menu option is selected, and 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 table contains one record: AMHP Report Form, 21/09/2022, In Progress, Scott Simpson, CareDirectorTest.

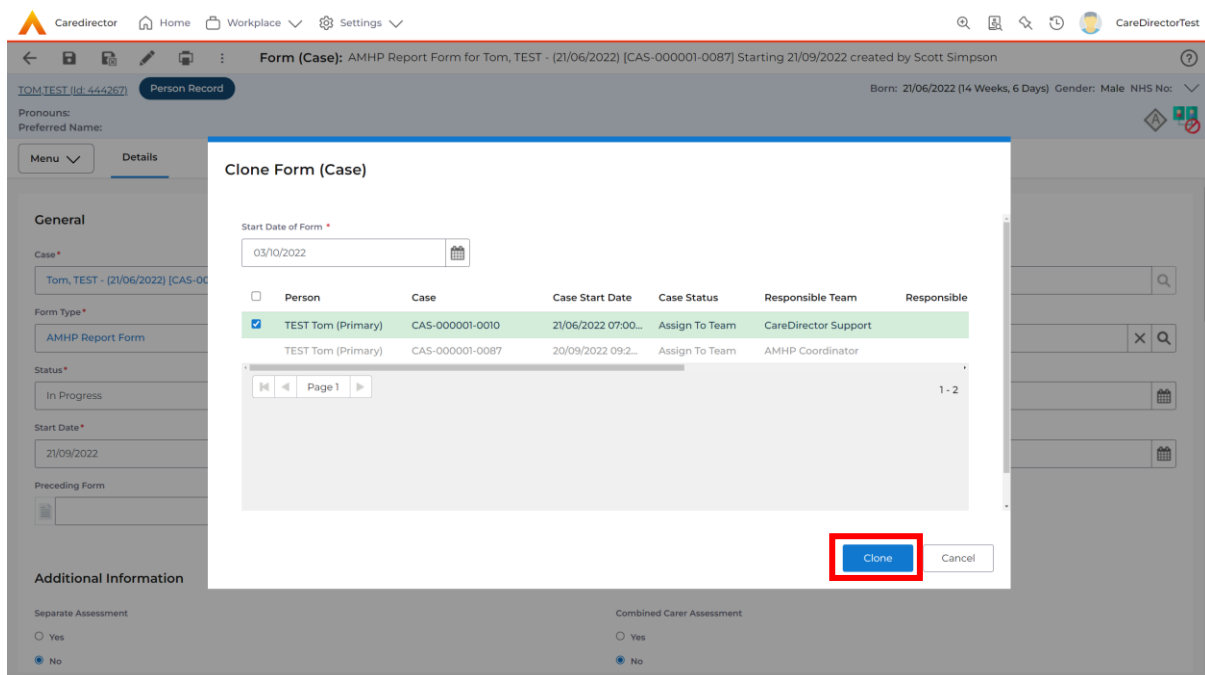
Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		



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**.

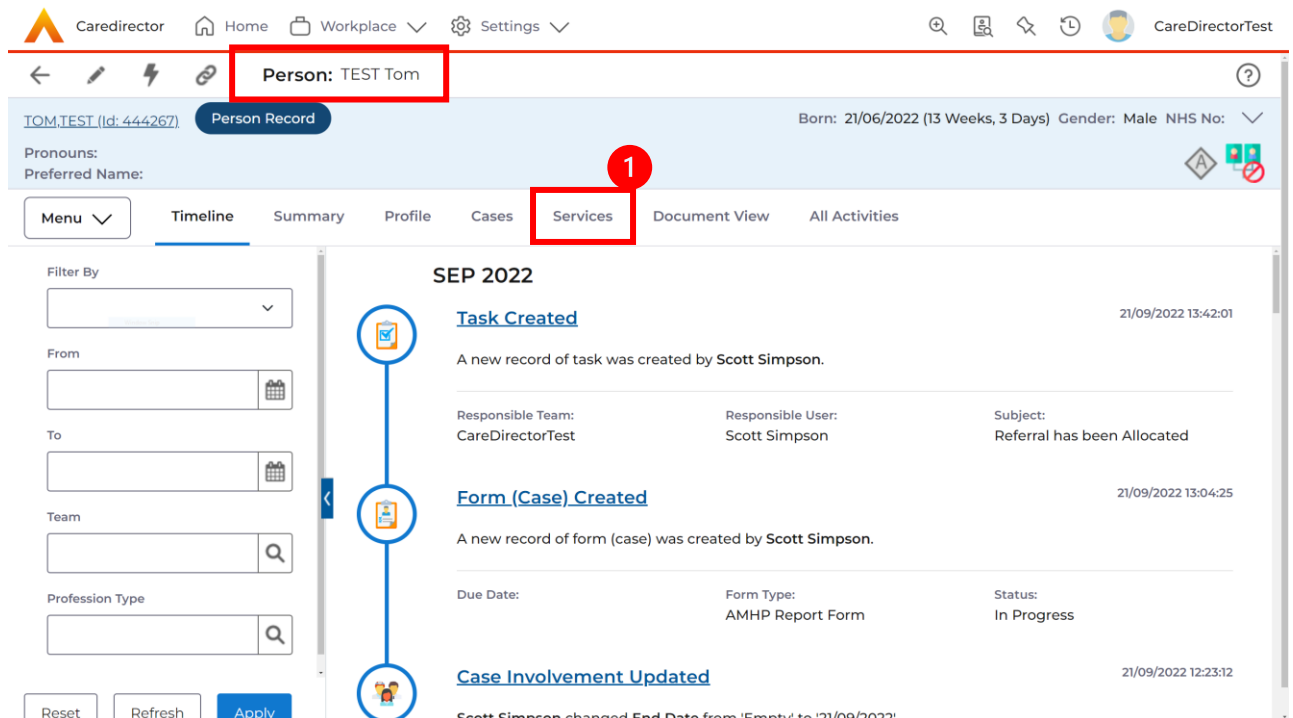
The screenshot shows the CareDirector interface with the following details:

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

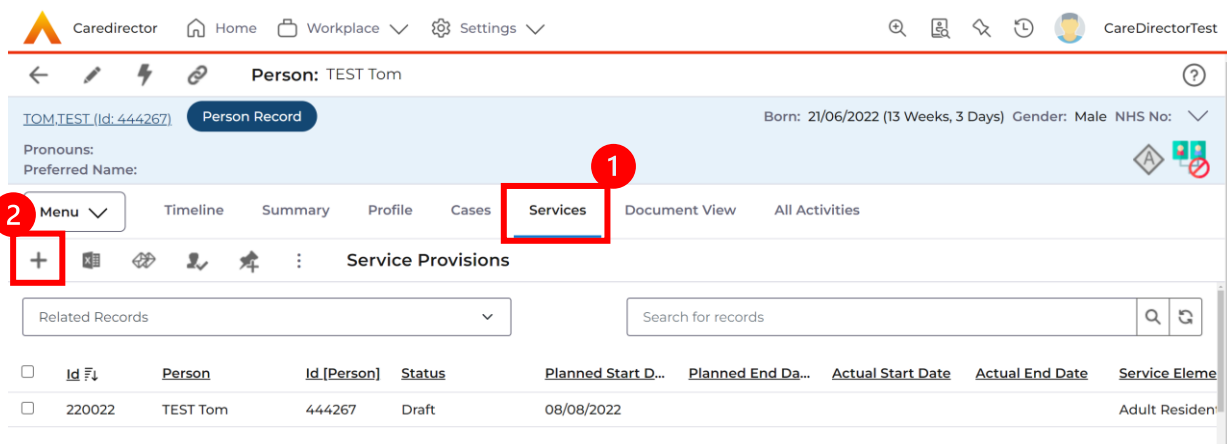
# How to input Service Provisions

## 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**.

The screenshot shows the 'Service Provision Statuses' dialog box in the CareDirector system. The dialog has a search bar and a table of statuses. The 'Ready for Authorisation' status is selected. The 'OK' button is highlighted with a red box and a number 3. The background shows the 'Person Record' for Tom Jones with the 'Status' field set to 'Draft' (numbered 1) and the 'Service Request' field set to 'Adult Residential Care'.

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**.

The screenshot shows the 'Service Provisions' grid view in the CareDirector system. The grid has columns for 'Id', 'Person', 'Planned Start Date', 'Planned End Date', 'Actual Start Date', 'Actual End Date', and 'Service Element 1'. The first row is selected with a checkbox (numbered 2). The 'Services' tab is selected in the top navigation (numbered 1). The 'Service Provisions' toolbar is open, showing the 'Authorise' option (numbered 4). The 'Person' field is 'TEST Tom' (numbered 3).

## 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 path 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 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" and "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 \ 22008...	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	

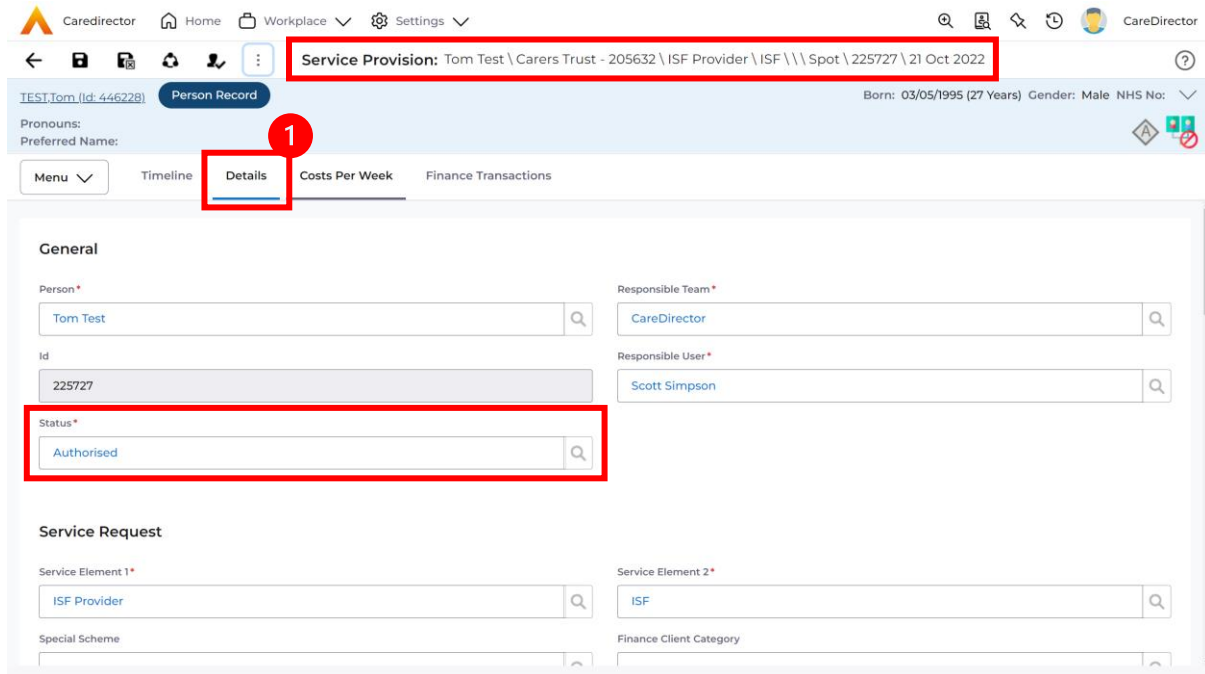
### Schedule applies to days

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

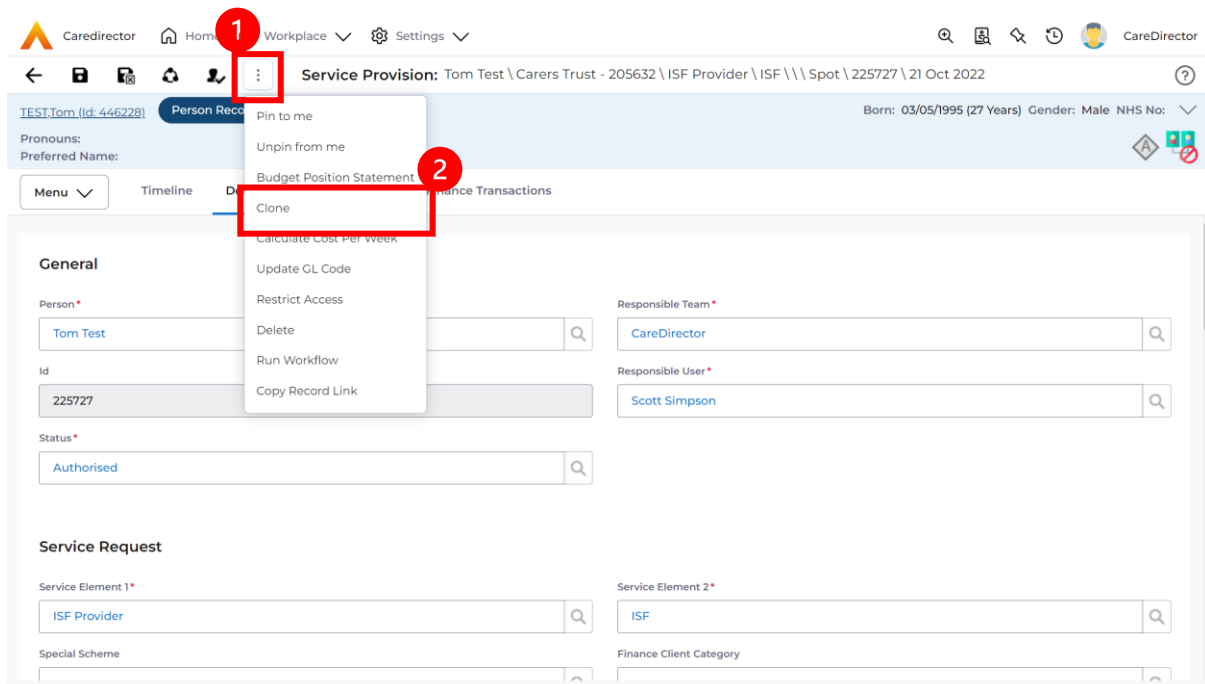
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

## How to Clone a Service Provision

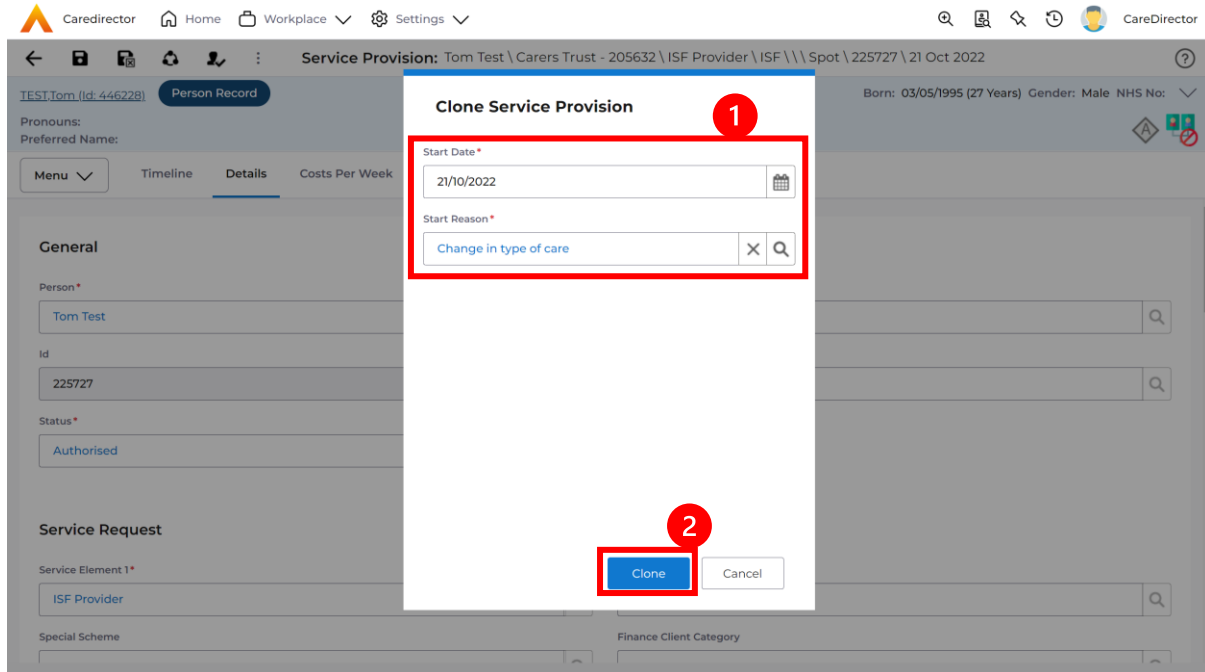
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



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 'Person Record' button is highlighted with a red circle and the number '2'. 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 'Actual End Date' and 'End Reason' fields are highlighted with a red box, and a red circle with the number '1' is next to the 'Actual End Date' field. The 'Commissioning' section contains the following fields:

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

## 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**.

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main content area shows a case record for 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Person Record' tab is active, showing details like 'Born: 21/06/2022 (13 Weeks, 1 Day)' and 'Gender: Male'. A 'Menu' dropdown is open, with 'Related Items' selected. Under 'Related Items', the 'Involvements' option is highlighted. Red boxes and numbers 1, 2, and 3 indicate the steps: 1. Click the 'Menu' dropdown, 2. Click 'Related Items', and 3. Click 'Involvements'.

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

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

Case Involvements

Related Records Search for records

<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 shows the CareDirector interface for a Case Involvement. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail reads 'Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...'. The 'Details' tab is active. The form fields are as follows:

Field	Value
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 Status	
End Date	21/09/2022
Involvement End Reason	
Involvement Review Date	
Involvement Reason	
Description	

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.



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 case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the 'Person Record' section displays 'TOM,TEST (Id: 444267)' and 'Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:'. A 'Menu' button is highlighted with a red box and a '1' in a red circle. Below the menu, the 'Activities' section is highlighted with a red box and a '2' in a red circle. The 'Activities' section contains several options: 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. The 'Appointments' option is highlighted with a red box and a '3' in a red circle. Below the activities, there are several search and filter fields for 'Responsible User', 'Responsible Team\*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By\*', and 'Archive Date\*'.

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> ⌵	<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**.

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus. The user profile 'CareDirectorTest' is visible in the top right. The main content area shows a task record titled 'Task: Referral has been Allocated'. A context menu is open over the task title, listing options: Clone, Complete, Cancel, Restrict Access, Delete, Run Workflow, and Copy Record Link. The 'Complete' option is highlighted with a red box. The task details section includes a 'Subject' field with the text 'Referral has been Allocated' and a 'Description' field with a rich text editor toolbar. The toolbar contains various icons for text formatting (bold, italic, underline, strikethrough), alignment, and other editing functions. The character count at the bottom right of the description field is 'Characters (with HTML): 0/100000'.

## 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 displays 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'. Below the navigation bar, a breadcrumb trail shows 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The main content area shows the 'Person Record' for 'TOM,TEST (Id: 444267)'. 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\*' field is highlighted with a red box and a red circle containing the number '2', and it contains the text 'Assign To Team'. Other fields in the 'Assignment Information' section include 'Case Priority', 'Responsible User', 'Responsible Team\*' (containing '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 for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. A modal window titled 'Case Statuses' is open, allowing the user to search for and select a case status. The modal includes a search bar and a list of status options. The 'Closed & Logged As Enquiry' option is selected. The 'OK' button is highlighted with a red box.

**Case Statuses** Enter your search criteria.

Look in: Social Care Case Status Lookup View

Search: Search for records

	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		

Page 1 | 1 - 13

**OK** Close

- 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 case record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is identified as 'CareDirectorTest'. The case details include 'TOM TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Assignment Information' section is highlighted with a red box and contains the following fields:

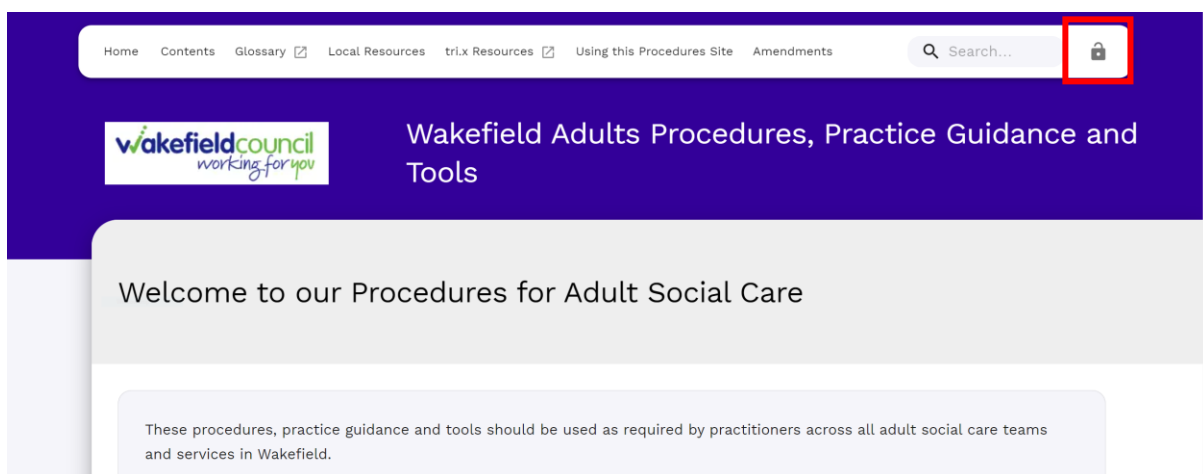
- Case Status\***: Closed
- Case Priority**: (Empty)
- Responsible User**: (Empty)
- Responsible Team\***: AMHP Coordinator
- Review Date**: (Empty)
- Last Assigned to Team Date**: 20/09/2022
- Close Date\***: 03/10/2022 13:43
- Closure Reason\***: All Work Completed
- Closure Accepted By\***: Scott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

The 'Other Information' section at the bottom includes 'Re-Referral' and 'Non-Migrated Worker Name'.

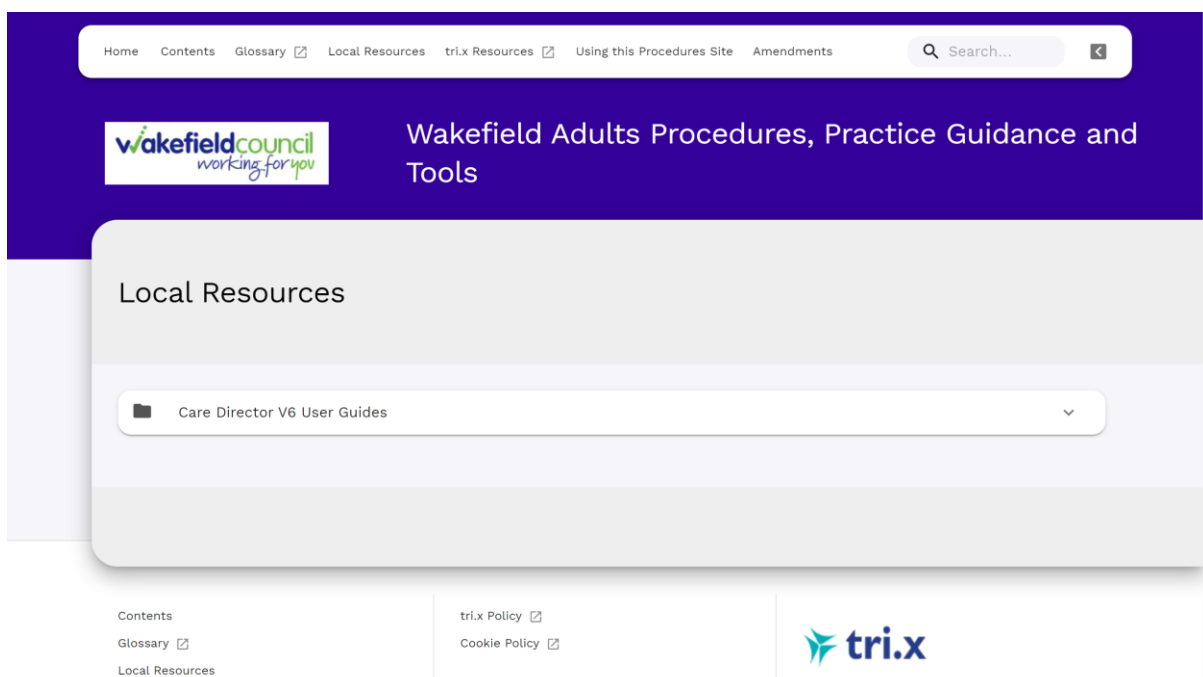
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

## 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	07/10/2022