

CAREDIRECTOR ADULT SAFEGUARDING TEAM



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

Last Updated 11/11/2022

Contents

Guide Information	4
Before Live Access	4
Guide Navigation	4
How to search for a Service User	6
Updating Person Details	7
How to search for a Case	
How to create a Case	9
How to check the Case Status	
How to change the Case Status	11
How to Allocate a Case to a Worker	12
How to send a Case to another team	14
How to add an Involvement (Secondary Allocation)	
How to find Activities	
How to input an Activity	21
How to change status to Complete (Re-activate Activities)	23
How to tell if an Activity is linked to a Case or Person Record	
How to Allocate a new Activity to another team	
How to Allocate an existing Activity to another team	
How to upload Attachments	
How to upload multiple attachments	
How to find an Adult Safeguarding Module	33
How to create an Adult Safeguarding Module	
How to input Allegations for an Adult Safeguarding Module	
How to find a Form (Case)	
How to add a Form	
How to Allocate a Form	
How to Clone a Form	
How to input Service Provisions	
Where to find Service Provisions	
How to Authorise a Service Provision	
How to input Service Deliveries	
How to Clone a Service Provision	51



How to End Service Provisions	53
How to close a Case	Error! Bookmark not defined.
Ending Involvements	Error! Bookmark not defined.
Close an Open Activity	
Closing a Case	
Further CareDirector Guidance	



CAREDIRECTOR ADULT SAFEGUARDING TEAM

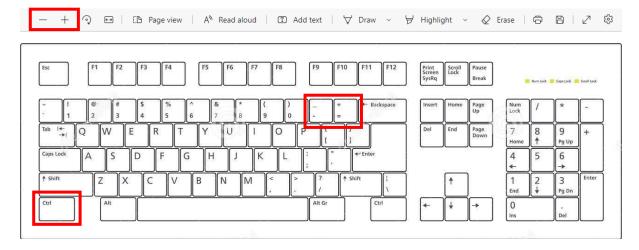
Guide Information

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.
- 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.

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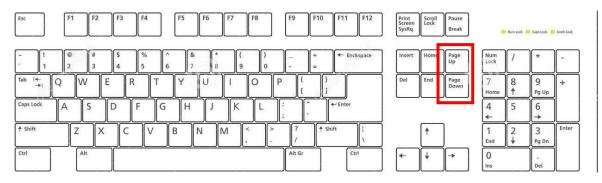
4. For auditory assistance, select **Read Aloud** from the toolbar.

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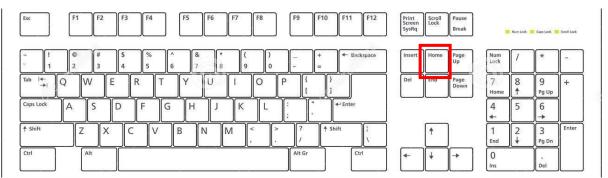
5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

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	CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING	
	Contents	
	Guide Information	
	Before Live Access	
	Dashboard4	
	How to search for a Service Uapr5	
	How to search for a Service Ugpr	
	How to search for a Provider	
	How to set up a new Provider9	
	How to see Provider Service Provisions	
	How to see Provider Suspensions12	
	How to add a Suspension on a Provider13	
	How to add a Service Type14	
	Overview of the Quality Assurance	

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.

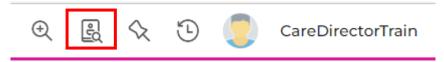




CAREDIRECTOR ADULT SAFEGUARDING TEAM

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.

	Searches Bef	ore create A	Allowed .
First Name			
Tom			
Middle Name			
Last Name			
MullenTest			
Stated Gender			
			~
NHS No.			
DOB			
Use Date of B	irth Range		
Date of Birth From	m		
			#
Date of Birth To			
			#

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).

A Caredian G Home C Workp	lace 🗸 🔞 Settings 🗸		G		CareDirectorTest
🔶 🖋 🦻 Person: TES	at Tom				0
TOM,TEST (Id: 444267) Person Record			Born: 21/06/2022 (1	5 Weeks, 0 Day) Gend	er: Male NHS No: 🗸
Pronouns: Preferred Name:					I 🖓 🍓
Menu V Timeline Summary	Profile Cases Services	Document View All Activitie	15		
Filter By	OCT 2022	2) Created of form (case) was created by Scott Sin	npson.		Yesterday at 15:05
то	Due Date:	Form Type AMHP Re	eport Form	Status: In Progress	
Team		ovision Created of service provision was created by Sco	tt Simpson.		Yesterday at 10:12
Profession Type	Actual Start Da	Co-ordin	ovided: ation Team \ SDS - WMDC I Account \ Home Care \ Spot	Status: Draft	
	SEP 2022				28/09/2022 13:58:47
Reset Refresh Apply	A new record	eo of task was created by Scott Simpson.			noy on yoo ka bhallarti

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

A Caredirector 1 Home 🖞 Workplace 🗸 🕸 Settings 🗸	\mathbb{Q} 🛃 🛠 🕚 🌅 CareDirectorTest
🔶 🖬 🗟 🖨 👶 : Person: TEST Tom	0
TOM,TEST (Id: 444267) Person Record	Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 💛
Pronouns: Preferred Name:	le 🖓 🖷
Personal Details	
ld*	Profile Picture
444267	1
Title	
First Name	
TEST	NH5 No.
Middle Name	
	Reason for no NHS No.
	Q
Last Name*	Ethnicity*
Tom	White British X Q
Stated Gender*	
Male 🗸	Marital Status
	Divorced X Q



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**.

A Caredirector 🎧 Hon	ne 📋 Workplace 🗸	영 Settings 🗸		Œ		🕒 🏮 CareDirectorTes
← ∥ ∦ ⊘	Person: TEST Tom	1				?
TOM,TEST (ld: 444267) Pronouns: Preferred Name:	n Record			Born: 21/06/2022 (1	5 Weeks, 0 Day)	Gender: Male NHS No: V
Menu 🗸 Timeline	Summary Profile	Cases Services	Document View	All Activities		
Filter By		ОСТ 2022				
	· Reference	Form (Case) Created	1			Yesterday at 15:05
From		A new record of form (case	e) was created by Sco t	t Simpson.		
То		Due Date:	Form Type: AMHP Re		Status: In Progre	ess
Team		Service Provision Cr	eated			Yesterday at 10:12
		A new record of service pr	ovision was created b	y Scott Simpson.		
Profession Type	٩	Actual Start Date:		tion Team \ SDS - anaged Account \	Status: Draft	
Reset Refresh Ap	pply					

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

人 Caredirector 🔓 Home 🗂 Workplace 🗸	ôð Settings 🗸			Q B & C)	rTest
🔶 🖋 🐐 🤗 Person: TEST Tom						?
TOM,TEST (Id: 444267) Person Record			Born: 21/	06/2022 (14 Weeks, 6 Days) G	ender: Male NHS No:	\sim
Pronouns: Preferred Name:	1					0
Menu Timeline Summary Profile + Image: Image	Cases Services	Document View All Ac	tivities			
Related Records ~		Search for re	cords		۵	3
□ <u>Responsible Team</u> <u>Responsible User</u> ±↓	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Cr
CareDirector Support	21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Sc
	20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Sc



How to create a Case

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

Caredirector 🎧 Home 🗂 Workplace 🗸	鑁 Settings 🗸			0. E. &	🕑 🌅 CareDire	ctorTest
🔶 🖌 🐓 🤗 Person: Tom Mullen	ēst					0
MULLENTEST,Tom.(Id: 444264) Person Record				Born: 03/05/1955 (67 Years)	Gender: Male NHS No	. ~
Pronouns: Preferred Name:					I 🖓 🕙	2
M2 Timeline Summary Profile	Cases Services	Document View All Act	tivities			
🕇 🕼 🌮 🎝 📌 🗄 Cases						
Related Records ~		Search for re	ecords		Q	S
<u>Responsible Team</u> <u>Responsible User</u>	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	<u>Creat</u> e
CareDirectorTest	24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST (
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**.

Caredian 🔓 🔓	iome 📩 Workplace	\sim	ැලි Settin	ngs 🗸				€	ł	\Diamond	€		CareD	irectorTes
🗧 🖬 🗟 Ca	se: New													?
ULLENTEST,Tom (Id: 444264	👔 👻 🛛 Person Reco	ord					Borr	n: 03/05,	/1955 (6	7 Years	;) Ger	nder: M	lale NH	S No: 🗸
onouns: referred Name:												Â	> 🌄	R .
Details														
Contact Details														
Case No*							Contact Received By*							
							Scott Simpson						×	Q
Person*							Contact Reason*							
Tom MullenTest					×	Q	A - Adult Safeguarding						×	Q
Case Date/Time*							Presenting Priority							
07/10/2022		09:0	00			Θ								Q
Initial Contact							Additional Information							
						Q								
Date/Time Contact Received														
06/10/2022	**	11:00	0			Θ	Referral Reason							



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**.

\rm Caredirector 🎧 Home 🗂 Workplace 🗸	டல் Settings V			0 I & U	CareDirecto	orTest
🔶 🖋 🦸 🤗 Person: TEST Tom						0
TOM,TEST (Id; 444267) Person Record			Born: 21/0	06/2022 (14 Weeks, 6 Days) Ge	nder: Male NHS No:	\sim
Pronouns: Preferred Name:	1					8
Menu V Timeline Summary Profile	Cases Services	Document View All Ac	tivities			
+ 🕮 🛷 🎝 🍂 i Cases						
Related Records		Search for re	cords		Q	S
□ Responsible Team Responsible User 14	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Crea
CareDirector Support	21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scot
AMHP Coordinator	20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

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

人 Caredirector 🔓 Home 🗂 Workplace 🗸 🕸 Settings 🗸		छ् 🧕 🛠 🔁 🌷 CareDirectorTest
🔶 🖬 🔞 🎝 🛃 : Case: Tom, TEST - (21/06/2022) [CA	S-0000	001-0087]
TOM,TEST (ld: 444267) Person Record		Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 💛
Pronouns: Preferred Name:		In the second
Menu V Timeline Details		
Assignment Information		2
Case Status*		
Assign To Team	× a	2
Case Priority		
	0	2
Responsible User		_
	C	A Contraction of the second seco
Responsible Team *		_
AMHP Coordinator	0	
Review Date		_
	Ê	
Last Assigned to Team Date		
20/09/2022	Ű	



How to change the Case Status

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

🖌 Caredirector 🔓 Home 🗂 Workplace 🗸 🕸 Settings 🗸	Q 🛃 🛠 边 🧔 CareDirectorTest
🛨 🖬 🕼 🖧 🎣 : Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]	0
DMJTEST (Id: 444267) Person Record	Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
onouns: eferred Name:1	I I I I I I I I I I I I I I I I I I I
Menu 🗸 Timeline Details	
Assignment Information	
Case Status*	
Assign To Team	
Case Priority	
٩	
Responsible User	
٩	
Responsible Team *	
AMHP Coordinator Q	
Review Date	
**	
Last Assigned to Team Date	
20/09/2022	

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

Caredirector 🎧 Home 🗂 Workpla	ce 🗸 🔞 Settings 🗸	🔍 🛃 🏡 🕑 🌅 CareDirectorTest
		0
MULLENTEST,Tom (Id: 444264) Y	Case Statuses Enter your search criteria.	3/05/1955 (67 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Look Social Care Case Status Lookup View	~ 🛞 😫 🙎
Menu V Timeline Details	Search Search for records	۹ ۵
Case Status*		Cov C
Assign To Team	Allocated 200013	•
Case Priority	Assign To Team 200014	
	Assigned to Team (unscheduled revie	
Responsible User	Awaiting Allocation 200012	
	Awaiting allocation (unscheduled revi	
Responsible Team*	K < Page 1 >	1 - 13
CareDirectorTest	2	
Review Date	ок	Close
Last Assigned to Team Date		



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.

🔥 Caredirector 🟠 Home 📥 Workplace 🗸 🕸 Settings 🗸	🔍 🎚 🏷 🕑 🌅 CareDirectorTest
← 🖬 📓 👶 & : Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019]	(?)
MULLENTEST,Tom (Id: 444264) V Person Record	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	In 1998 🔊 🖉 🖉
Menu V Timeline Details	
Assignment Information	
Case Status*	
Assign To Team X Q	
٩	
Responsible User	
Q.	
Responsible Team*	
CareDirectorTest	

- 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**.

Case Status*		
Assign To Team		X Q
人 Caredirector 🎧 Home 🗂 Workplace 🗸 😫	ĝi Settings ∨	व् 🖳 🛠 🗿 🌷 CareDirectorTest
← 🖻 🗟 🎝 L₂ i Case: Mull	enTest, Tom - (03/05/1955) [CAS-000001-0019]	0
MULLENTEST.Tom ((d: 444264) Person Record		Born: 03/05/1955 (67 Years) Gender: Male NHS No: 💛
Pronouns: Preferred Name:	Case Statuses Enter your search criteria.	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details		
	Look Social Care Case Status Lookup View 🗸	
	Search Search for records Q Q	
Assignment Information	Search for records Q Q	
Case Status*	Name 🕌 Code G	
Assign To Team	Allocated 200013	
Case Priority	Assign To Team 200014	
	Assigned to Team (unscheduled revie	
Responsible User	Awaiting Allocation 200012	
	Awaiting allocation (unscheduled revi	
Responsible Team*	Closed Closed & Logaed As Enquiry	
CareDirectorTest	Closed & Logged As Enquiry	
Review Date	H ≪ Page1 ► 2 1-19	
Last Assigned to Team Date	Close	
24/06/2022		

5. 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*		Q
💊 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settin	igs 🗸	🔍 🛃 🍕 🕑 🌅 CareDirectorTe
- B 🗟 🌢 🎝 : Case: MullenTest,	Tom - (03/05/1955) [CAS-000001-0019]	C
ULLENTESTTom (kt. 444264) Person Record onouns: eferred Name:		Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🔌
Menu V Timeline Details	System Users Enter your search criteria. Look In System Views Active Managers Search Descritated Users	
Case Status* Allocated	Leackup View My Business Unit Users My Default Team Nat 5 My Record	
Case Priority	CareLivelFD Wakefield CareDirectorTest CareLiveInstall CareWo CareDirectorTest	
Responsible User*	CareLiveInternal Wake 2 CareDirectorTest	
	CareLiveMigration Was CareDirectorTest	
Responsible Team*	CareLivePlugin Wakefie CareDirectorTest	
CareDirectorTest	CareLivePowerusr Wak CareDirectorTest	
Review Date	CareTestIFD Account CareDirectorTest	
Last Assigned to Team Date		
24/06/2022	OK Close	

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

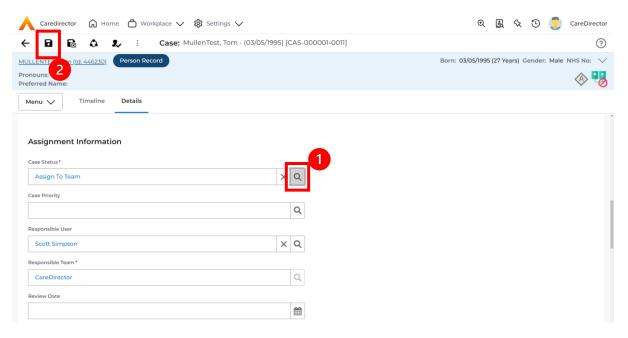
Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸	🔍 🛃 🛠 🕑 🌅 CareDirectorTest
← 🖪 🔓 🎝 I₂ : Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019]	(?)
MULLENTE 1 3: 4442641 V Person Record	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸
Pronouns. Preferred Name:	I 🕾 🛃 🖉
Menu V Timeline Details	
Assignment Information	
Allocated X Q	
Case Priority	
Q	
Responsible User* Scott Simpson X Q	
Responsible Team*	
CareDirectorTest Q	
Review Date	
m	



CAREDIRECTOR ADULT SAFEGUARDING TEAM

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.**



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.

A Caredirector 🛱 Home 1 rkplace V 🕸 Settings V	Θ ह्यु 🛠 🕑 🌅 CareDirector
← 🖬 🗟 🎝 ፤ Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	(?)
MULLENTEST.Tom (ld: 446230) Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 💛
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details	
Assignment Information	
Case Status*	
Assign To Team X Q	
Case Priority	
Q	
Responsible User	
Q	
Responsible Team *	
CareDirector	



5. This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup function**.

人 Caredirector 🔓 Home 🗂 Workplace 🗸	ĝi Settings ∨	0 🛃 🛠 🕑 🌅 CareDirector
🔶 🖬 🗟 🕹 🎝 i Case: M	ullenTest, Tom - (03/05/1995) [CAS-000001-0011]	0
MULLENTEST,Tom (ld: 446230) Person Record	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Responsible Team*	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details	× Q	
Assignment Information	Responsible User Decision*	
Case Status*	×	
Assign To Team	Include Inactive?	
Case Priority	Related Records to Include	
	Check/Uncheck All	
Responsible User	Adult Safeguarding	
	Adult Safeguarding Primary Reason History	
Responsible Team *	Adult Safeguarding Secondary Reason	
CareDirector	Adult Safeguarding Status History	
Review Date	Note	
	Task	
Last Assigned to Team Date		
21/10/2022	OK Close	

 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.

\rm Caredirector 🎧 Home 🗂 Workplace 🗸 &	3 Settings 🗸		0 🛃 🛠 讫 킻 CareDirector
🔶 🖬 🗟 🔕 🎝 i Case: Mulle	enTest, Tom - (03/05/1995) [CAS-000001-00	11]	0
MULLENTEST.Tom (id: 446230) Person Record Pronouns: Preferred Name: Menu Timeline Details Assignment Information	Look My Teams in System Views Lookup View Ny Teams Search My Teams	↓ →	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Case Status*	<u>Name</u> ≟↓	<u>Business Unit</u>	
Assign To Team	Adults Connecting Care Team West	Adult Services	
Case Priority	AMHP rota	Adult Services	
	CareDirector	CareDirector	
Responsible User	Sensory Impairment Team	Adult Services	
Responsible Team *			
CareDirector			
Review Date	Page1	2 1-4 ОК Close	
Last Assigned to Team Date			
21/10/2022	m		



7. 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.**

人 Caredirector 🎧 Home 🗂 Workplace 🗸	🔞 Settings 🗸	🔍 🛃 🛠 讫 🌅 CareDirector
🔶 🖬 🕼 🗘 🎣 : Case: M	ullenTest, Tom - (03/05/1995) [CAS-000001-0011]	0
MULLENTEST,Tom (Id: 446230) Person Record Pronouns:	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: V
Preferred Name:	Responsible Team *	✓ -Ø
Menu V Timeline Details	Sensory Impairment Team	
Assignment Information	Responsible User Decision *	
Case Status*	Do not change 🗸 🗸	
Assign To Team	Include Inactive?	
Case Priority	Related Records to Include	
	Check/Uncheck All	
Responsible User	Adult Safeguarding Adult Safeguarding Primary Reason History	
	Adult Safeguarding Secondary Reason	
Responsible Team *	Adult Safeguarding Status History	
CareDirector	□ Note	
Review Date		
	OK Close	
Last Assigned to Team Date		
21/10/2022		

8. 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.



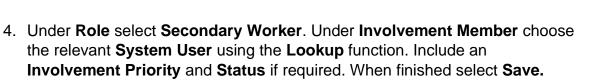
How to add an Involvement (Secondary Allocation)

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

Caredirector 🟠 Home	🖰 Workplace 🗸	🔯 Settings 🗸					Q 🛃 🛠	CareDirectorTe	est
← : Case: Maisey, Te	est - (19/11/2000) [C.	AS-000001-0080]						?) Î
MAISEY,Test (Id: 444301) Y	eceased		•		Born: 19/11/2000 Died: 31/08	3/2022 Age at Death:	21 Years Gender: Fema	le NHS No: 523 669 8081 📏	4
Pronouns: She/He								🚸 🧟 오 🎍	
Menu 🔨 Timeline I	Details							3	
Activities	6	٢	Ø	<u>e</u>		•	<u>i</u>	*	Î
	Actions	Adult Safeguarding	Attachments	Audit	Conferences/Meetings	Deprivations Of Liberty	Forms (Case)	Involvements	1
Related Items		(24)	1						1
Other Information 2	volvements History	Joint Case Members							1
	m								4
Team	· · · · ·		Form (Case) Created					31/08/2022 08:37:50	
	Q		A new record of form (case) wa	s created by Ma	tt Davies.				
Profession Type				-					
	Q	<	Due Date: 01/09/2022		Form Type: Occupational Therapy Refe	erral (Secondary	Status: In Progress		
					Allocation)				
			Case Involvement Updat	ed				31/08/2022 08:31:33	
		Ŷ	Matt Davies changed End Date	from 'Empty' to	31/08/2022'.				
			Involvement Member:		Role:		Start Date:		
			Community Occupational Ther	aby service	* Secondary Team		31/08/2022		
			Case Involvement Upda	ed				31/08/2022 08:31:26	
inveriRezet Refresh Apply		<u> </u>	Matt Davies changed End Date	from 'Empty' to	31/08/2022'.				

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

Caredirector 🔓 Hor	me 💾 Workplace	✓ 袋 Settings 、	\checkmark		€	Ę	<u>ର</u> ୍ଗ	ษ 🤇	CareDire	ctorTe
← Case: Maisey, Test	- (19/11/2000) [CAS-	000001-0080]								?
MAISEY,Test (Id: 444301) ×	Deceased	Born	: 19/11/2000 Di	ied: 31/08/2022 Age at Death: 21 Y	'ears Ge	nder:	Female	NHS No	: 523 669 808	31 🗸
Pronouns: She/Her Preferred Name:								<	8 🧕 9	•
M	Details									
+ 💷 🎗 🗑	Case Involveme	nts								
Related Records 🗸				Search for records					С	ß
Involvement Member	Role	Involvement Re	Case		Respo	onsible	e Team	1	<u>Start Date</u> ₹↓	
Sensory Impairment Te	* Secondary Team		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Senso	ory Imp	airment	: Te	31/08/2022	
Community Occupatio	* Secondary Team		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Comr	nunity	Occupa	tio :	31/08/2022	
Matt Davies	Responsible User		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Care	Director	rTest	:	30/08/2022	
Matt Davies	Responsible User		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Care	Director	rTest	:	30/08/2022	
	* Secondary Wor			- (19/11/2000) [CAS-000001-0080]	C	Director			30/08/2022	



viakefieldcouncil working for you

Case Involvement: New							
etails							
General							
Case *			Responsible Team *				
Tom, TEST - (21/06/2022) [CAS-000001-0087]	×	Q	CareDirectorTest			×	Q
Person*			Involvement Priority				
TEST Tom	×	Q					Q
involvement Member*			Involvement Status				
Peter King	×	Q					Q
Role*			End Date				
* Secondary Worker	×	Q					Ê
Start Date *		(volvement End Reason				
04/10/2022							Q
involvement Reason			Involvement Review Date				
		Q					Ê
Description							



How to find Activities

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

ive Tasks/Notes							
s 1, w							
ubject	Regarding	Priority	Event Date	Due	Created On	Created By	Modified
ase has been allocated	Tom, Test - (03/0			31/10/2022 10:40:	31/10/2022 10:40:	Scott Simpson	31/10/202
ase has been allocated	Tom, Test - (03/0			31/10/2022 10:29:11	31/10/2022 10:29:37	Scott Simpson	31/10/202
ase has been allocated	Test, Jayne - (06/			28/10/2022 14:58:	28/10/2022 14:58:	Scott Simpson	28/10/202
lew Occupational Therapy Referral	Occupational Th			19/10/2022 00:00:	19/10/2022 11:39:09	Test Adults Triage User	28/10/202
ase has been allocated	Test, Jayne - (06/			28/10/2022 13:51:28	28/10/2022 13:51:31	Jayne Mullen	28/10/202
Dama 1							
Page I							1.
ive Case Notes							
a 1, w							
ubject	Person	Priority					Modified
a a a	se has been allocated se has been allocated w Occupational Therapy Referral se has been allocated Page 1 Ve Case Notes	se has been allocated Tom, Test - (03/0 se has been allocated Test, Jayne - (06/ w Occupational Therapy Referral Occupational Th se has been allocated Test, Jayne - (06/ Page 1	Page 1 Page 1	se has been allocated Tom, Test - (03/0 se has been allocated Test, Jayne - (06/ w Occupational Therapy Referral Occupational Th se has been allocated Test, Jayne - (06/	se has been allocated Tom, Test - (03/0 33//0/2022 10:29:11 se has been allocated Test, Jayne - (06/ 28/10/2022 14:58: w Occupational Therapy Referral Occupational Th 19/10/2022 00:00: se has been allocated Test, Jayne - (06/ 28/10/2022 13:51:28	Page 1 Ver Case Notes Ver Case Notes Tom, Test - (03/0, Test - (03/0, 31/10/2022 10:29:37	Page1 Page1 Ver Case Notes

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

) 🥊 CareDire
(
r: Male NHS No: `
I (
Case Note
No
Yes



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

Caredirector 🎧 Home 🗂 W	/orkplace 🔨	🗸 🔞 Settings 🗸				Q L 🔍 🗘	CareDire
– 🖍 🖣 🔗 Person:	Test Tom						(
M.Test (Id: 446229) Person Record						Born: 03/05/1996 (26 Years) Gender:	Male NHS No:
onouns: eferred Name:							À 📎
Menu 🗸 Timeline Summa	ry Profi	le Cases Se	vices Documen	t View All A	Activities		
All Activities							
Keyword	Ô	Regarding	Subject	Activity	Status	Start/Due Date Actual End	Case Note
		Test Tom	Case	Task	Open	03/11/2022 14:00:	No
Activity Type		Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:40:	Yes
All		Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:29:11	Yes
Date Type		Test Tom	Date of Death E	Task	Open	26/10/2022 13:44:	Yes
Created Date		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
From							
То							
01/11/2022	1						
Actual End (From)							
	•						
Clear Filters Search 2	* 						

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

Caredirector 🎧 Home 🛱 Work	place `	✓ 🔅 Settings ∨				Q 🖳 🛠 🕑	CareDire
• 🌶 🥊 🤗 Person: Te	st Tom	1					(
M.Test (Id: 446229) Person Record						Born: 03/05/1996 (26 Years) Gender:	Male NHS No:
ferred Name: Menu Timeline Summary	Pro	file Cases Ser	rvices Documen	t View All	Activities		
All Activities	î 🗆	Regarding	Subject	Activity	Status	Start/Due Date Actual End	Case Note
		Test Tom	Case	Task	Open	03/11/2022 14:00:	No
Activity Type	0	Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:40:	Yes
All		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
Date Type		Test Tom \ Willia	Booking request	Task	Open	21/10/2022 15:37:26	Yes
Created Date 🗸		Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
From	<						
То							
01/11/2022							
Actual End (From)							



How to input an Activity

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

Caredirector 🞧 Hor	me 🗂 Workplace 🗸	/ 🔞 Settings 🗸				€ 🛃 🛠	🕑 🃒 CareDirectorTest
	🎝 : Case:	Tom, TEST - (21/06/20	22) [CAS-000001-008	37]			0
TOM,TEST (Id: 444267) Perso	on Record				Born: 21/06/202	2 (14 Weeks, 6 Days)	Gender: Male NHS No: 🗸
Pronouns: Preferred Na							I I I I I I I I I I I I I I I I I I I
Menu A Timeline	Details						
Activities Related Items	Appointments	Case Notes	(<u>e</u>) Emails	Letters	U Phone Calls	Tasks	
Other Information							
Responsible User			٩				
Responsible Team*			Q				

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

	Caredirector 🎧 Home 🛱 Wor	kplace 🗸 🔞 Settings	\sim			Q 🖳 🛠 🕑 🄇	CareDirectorTe
←	Case: Tom, TEST - (24/07/1950)	[CAS-000001-0018]					?
	1.TEST (ld: 444276) Yerson Record					Born: 24/07/1950 (72 Years) Gender:	Male NHS No: 📏
	nouns: ferred Name: Tom	_					🚸 🌄 🙎
Menu V Timeline Details							
+	🔊 🎝 🗑 Tasks						
R	elated Records	~		Search for records			α
	<u>Subject</u>	<u>Due</u> ≣t	<u>Status</u>	Regarding	Reason	Responsible Team	Responsible Use
	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	

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**.

🔨 Caredirect 2 D Home 🗂 Workplace 🗸 🕸 Settings 🗸	Q 🛃 🛠 🕑 🧶 CareDirectorTest
🔶 🖬 🗟 🗸 X Case Note (For Case): New	0
TOM.TEST.(Id: 444267) Person Record	Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 📏
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Details	
Details	
Case*	Responsible Team*
Tom, TEST - (21/06/2022) [CAS-000001-0087] X	CareDirectorTest X Q
Reason	Responsible User
Q	Scott Simpson X Q
Priority	Category
Q	Q
Date*	Sub-Category
	٩
Status*	Outcome
Open v	Q
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.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸	🔍 🛃 🛠 🕑 🌅 CareDirectorTest
🔶 🖬 🙀 🖍 🖨 : Form (Case): Adult - Change to Service Requ	est for MullenTest, Tom - (03/05/1955) [CAS-000001-000 ?
MULLENTEST 2 Id: 444264) V Person Record	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 💛
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu V Details	
Case* Responsible To	eam*
MullenTest, Tom - (03/05/1955) [CAS-000001-0002] Q CareDirect	torTest Q
Form Type* Responsible U	ser
Adult - Change to Service Request	pson X Q
Status* Due Date	
Complete ~ 23/06/202	2 🛗
Not Started Review Date	
In Progress Complete Closed	
Cancelled Approved	

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.

Caredirector 🞧 Home	🗂 W 👔 ce 🗸 🕸 Settings 🗸	🔍 🛃 🛠 🕒 킻 CareDirectorTest
< 0 % ₫ Q	: Task: Test Task for Case	0
MULLENTEST.Tom (ld: 444264) Pronouns: Preferred Name:	Activate Delete 2	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸
Menu 🗸 Details	Run Workflow Copy Record Link	
General Subject*		
Test Task for Case Description		
Styles - Format - Font	# # # # # E 全 道 目 = 虫 严 囲 ⊟ ⊕ ① ↓ ~ Size ~ ▲~ ⊠~ X 凸 団 団 国 ★ → Q 및	
Test		

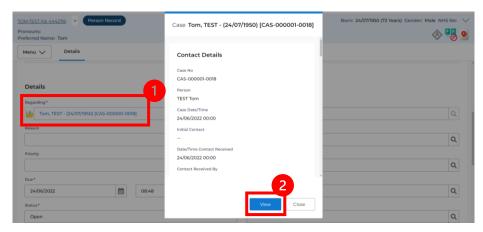


How to tell if an Activity is linked to a Case or Person Record

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

人 Caredirector 🎧 Home 📥 Workplace 🗸 🔅 Settings 🗸	Q 🛃 🛠 🕑 🌅 CareDirectorTest
🔶 🖬 🗟 🔕 🎝 : Task: CHC Funding Decision - Fully funded	0
TOM.TEST (ld: 444276) Y Person Record	Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name: Tom 1	I I I I I I I I I I I I I I I I I I I
Menu V Details	
Details 2	
Regarding*	Responsible Team *
Tom, TEST - (24/07/1950) [CAS-000001-0018]	CareDirectorTest Q
Reason	Responsible User
٩	٩
Priority	Category
٩	٩
Due*	Sub-Category
24/06/2022 🛍 08:48 🛇	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?

- 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

 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.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸			🔍 🎚 🛠 🕲 킻 CareDi	irector
🔶 🖬 🕼 🗸 X Task: New				?
MULLENTEST.Tom (Id: 446230) Person Record			Born: 03/05/1995 (27 Years) Gender: Male NHS No	»: 🗸
Pronouns: Preferred Name:			*	•
Details				
Regarding •			Responsible Team*	
MullenTest. Tom (03/05/1995).[CAS-000001-0011]	×	Q	CareDirector X Q	٤
Reason			Responsible User	
		Q	Scott Simpson X Q	٤
Priority			Category	
		Q	Q	٤
Due*			Sub-Category	- 1
m		Θ	Q	١
Status*			Outcome	
Open		~	Q	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.

Caredirector 🎧 Home 🗂 Workplace 🗸 🧯	🖁 Settings 🗸		⊕ <u>E</u> <	ર ૭ 🏮	CareDirec
🗧 🖬 🖌 🗸 Task: New					(
ULLENTEST,Tom (Id: 446230) Person Record			Born: 03/05/1995 (27 Years) Gender: Male	NHS No:
onouns: eferred Name:	Teams Enter your search criteria.				
Details	Look in System Views Lookup View	~			
Regarding*	Search My Teams Reference Data Owner Teams				
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	Name 🔤	Business Unit			XQ
Reason	Adults Connecting Care Team West	Adult Services			
	AMHP rota	Adult Services			XQ
Priority	CareDirector 2	CareDirector			
	Sensory Impairment Team	Adult Services			٩
Due*					
					Q
Status*					
Open	Page 1	3 1-4			Q
Contains Information Provided By A Third Party?					
O Yes	ок	Close			
No	e 10				



 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.

人 Caredirector 🎧 Home 📥 Workplace 🗸 🔞 Settings 🗸		0् 🛃 🛠 🕑 킻 CareDirector
🗲 🖬 🕼 🗸 X Task: New		0
MULLENTE 2 (Id: 446230) Person Record		Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:		I I I I I I I I I I I I I I I I I I I
Details		
Regarding*		Responsible Team *
	XQ	Sensory Impairment Team X Q
Reason		Responsible User
	Q	Scott Simpson X Q
Priority		Category
	Q	٩
Due*		Sub-Category
£	Θ	٩
Status*		Outcome
Open	~	٩
Contains Information Provided By A Third Party?		Is Case Note?
○ Yes		○ Yes
No		No



How to Allocate an existing Activity to another team

 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.

🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🟟 Settings 🗸		९ 🖪 🛇 🛈 🏮	Car	eDirector
🔶 🖬 💦 👶 🎝 i Task: Test				?
MULLENTES, (d: 446230) Person Record		Born: 03/05/1995 (27 Years) Gender: Ma	le NHS	No: 🗸
Pronouns: Preferred Name:			<	> 🌄
Menu V Details				
Details				
Regarding*		Responsible Team *		
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	Q	Sensory Impairment Team		9
Reason		Responsible User	_	_
	Q	Scott Simpson	\times	۹
Priority		Category		- 1
	Q			Q
Due*		Sub-Category		
28/10/2022	0			Q
Status*		Outcome		
Open	~			Q

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

🙏 Caredirector 🞧 Home 🗗 kplace 🗸 🕸 Settings 🗸	🔍 🛃 🛠 🛈 🌅 CareDirector
← 🖬 📾 🎝 🎝 : Task: Test	0
MULLENTEST.Tom (ld: 446230) Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 📏
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu V Details	
Details	
Regarding*	Responsible Team *
MullenTest. Tom - (03/05/1995).[CAS-000001-0011]	Sensory Impairment Team Q
Reason	Responsible User
٩	Q
Priority	Category
٩	Q
Due*	Sub-Category
28/10/2022 🛗 08:00 🛇	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?
<u></u>	· · ·



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

人 Caredirector 🎧 Home 🗂 Workplace 🗸	袋 Settings ∨	🔍 🛃 🏡 🕑 🌅 CareDirector
🔶 🖻 🗟 👶 🎝 i Task: Tes	st	0
MULLENTEST.Tom (Id: 446230) Person Record	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗡
Pronouns: Preferred Name:	_1	I I I I I I I I I I I I I I I I I I I
Menu V Details	Responsible Team*	
Regarding*	Responsible User Decision*	
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	~	Q
Reason		
		٩
Priority		
		Q
Due*		
28/10/2022		Q
Status*		
Open		۹
Contains Information Provided By A Third Party?	OK Close	

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

人 Caredirector 🎧 Home 🗂 Workplace 🗸		0 🛃 🛠 🖸 🧔 CareDirector
🔶 🖬 🔂 👶 🎝 i Task: Te	st	0
MULLENTEST.Tom (Id: 446230) Person Record Pronouns: Preferred Name:	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Menu V Details	Responsible Team* Adults Connecting Care Team West X	
Regarding *	Responsible User Decision*	
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	Do not change v	٩
Reason	1	٩
Priority		م
Due* 28/10/2022		Q
Status*		
Open Contains Information Provided By A Third Party? Ves	2 Ок Close	<u> </u>

5. 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**.

Caredirector 🞧 Hom	ne 🗂 Workplace 🗸 🕅	Settings 🗸		€ 🛃 🛠	🕑 🏮 CareDirectorTest
< 1 4 0	Person: TEST Tom				0
TOM,TEST (Id: 444267) Persor	n Record		Born:	21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Nam					I I I I I I I I I I I I I I I I I I I
Menu 🔨 Timeline	Summary Profile	Cases Services	Document View All Ad	tivities	3
Activities		9	B	Щ	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
		20	2	a	é
Health	Audit	Complaints And Feedback	Contacts	Forms (Person)	Primary Support Reasons
Mental Health Act	9				
Work and Education	Subject Access Request				
Other Information					
Finance					
Care Network					

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

Caredirector 🎧 Home 🗂 Work	kplace 🗸 🔞 Settings	\sim			Ð 🛃	\Diamond	5		CareDirectorTest
🔶 🖋 🦸 🔗 Person: Te	EST Tom								?
TOM,TEST (Id: 444267) Person Record				Born: 21/06/2022	(15 Weeks	, 0 Day)	Gend	er: Mal	e NHS No: 🗸
Pronouns: Preferred Name:									Image: A start and a start
M 1 Timeline Summary	Profile Cases	Services Doc	ument View	All Activities					
+ 🕮 🕮 🗑 Attachme	nts (For Person)								
Related Records 🗸			Search for record	ds					Q S
Title	Document Type	Document Sub	Туре	Date	Crea	ated By			Created On
		NO RECOR No results were for this scree	found						



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

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🛞 Settings 🗸	0् 🛃 🐟 😳 🌅 CareDirectorTest
🔶 🖬 🗟 Attachment (For Person): New	0
TOM,TEST (ld: 444267) Person Record	Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Details	
General	
Person*	Responsible Team *
TEST Tom XQ	CareDirectorTest X Q
Title *	File*
Test Document Upload	
Date*	Choose file Browse
04/10/2022	
Document Type*	O Yes
Clients X Q	 No
Document Sub Type*	
٩	
Cloning Information	
Is Cloned?	Cloned From
O Yes	
® No	

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

C Open											×
\leftrightarrow \rightarrow \checkmark \uparrow	> This PC	> Documents > CareDire	ctorV6 → ME	Training			ٽ ~	,⊂ Sear	ch ME Traini	ng	
Organise 🔻 New	fold										?
OneDrive	^ - rea	nie A		Date modified	Турс		Size	٦			
OneDrive] Training Superuser Bookin	g Sheet	09/03/2022 10:27	Micro	soft Excel C	1 KB				
💻 This PC								_			
🗊 3D Objects											
E Desktop											
Documents											
🖊 Downloads											
👌 Music											
E Pictures											
Videos											
🎬 Windows (C:)											
🛖 Datastore (G:)											
👳 scottsimpson U	Js										
A Network	~										
F	File name:	Training Superuser Booking	Sheet					✓ All files	_ 2		\sim
	L							Oper		Cancel	

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

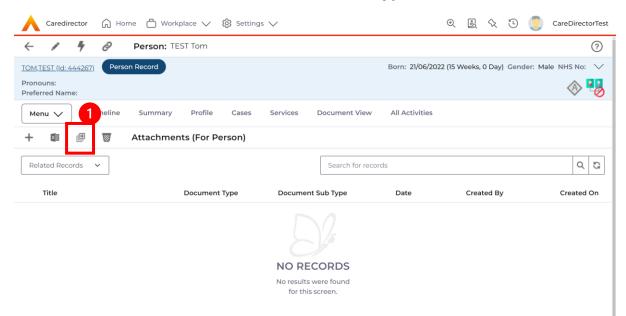


How to upload multiple attachments

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**.

Caredirector 🎧 Hom	ie 🗂 Workplace 🗸 🖇	Settings 🗸		€ 🖳 🛠	🖸 🏮 CareDirectorTest
< ∥ ¶ ∂	Person: TEST Tom				0
TOM,TEST (Id: 444267) Person	n Record		Born:	21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name					I I I I I I I I I I I I I I I I I I I
Menu 🔨 Timeline	Summary Profile	Cases Services	Document View All Ad	tivities	3
Activities 2		9	10	1 01	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
		20	2	<u> </u>	é
Health	Audit	Complaints And Feedback	Contacts	Forms (Person)	Primary Support Reasons
Mental Health Act	9				
Work and Education	Subject Access Request				
Other Information					
Finance					
Care Network					

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





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

Caredirector 🟠 Ho	me 🛱 Workplace 🗸	🔞 Settings 🗸				(2 2	\Diamond	ত 🏮	CareDirec	ctorTest
- 1 4 Ø	Person: TEST Tom										?
TOM.TEST (Mr) (Id: 444276)	Person Record					Born: 24/07	/1950 (72	Years)	Gender: Ma	ale NHS No:	\sim
Pronouns: Preferred Name: Tom										A 2	0
Menu 🗸 Timeline	Summary Profile	Cases Services	Document View	All Activities							
+ 💵 🕮 🗑	Attachments (For										
Related Records V		Upload Multiple	Files							Q	G
Title	Docum	Document Type*		esponsible Team *		Ĉ	ated On		Modified I	Bv	M
			۹	CareDirectorTest	XQ						
		Document Sub Type*	٩								
			2								
		Files									
		Browse for Files									
				Start Uploa	d Close						

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

Caredirector 🎧 Home 🖨 Workpl	lace 🗸 🔞 Settings 🗸	€	1 &	છ 🏮	CareDire	ectorTest
🔶 🖍 🦸 🔗 Person: TES	it Tom					?
TOM.TEST (Mr) (Id: 444276)	rd	Born: 24/07/1950 (7	72 Years)	Gender: Ma	le NHS No	»: ∨
Pronouns: Preferred Name: Tom					A 오	•
Menu V Timeline Summary	Profile Cases Services Document View All Activities					
🕂 💷 🕮 🗑 Attachment	ts (For	_				
Related Records v	Upload Multiple Files				C	2 3
Title	Docum	Created O	n	Modified E	Зу	м
	Files Frowse for Files Drop files here to attach them them to be added by the second s	ľ				

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**.

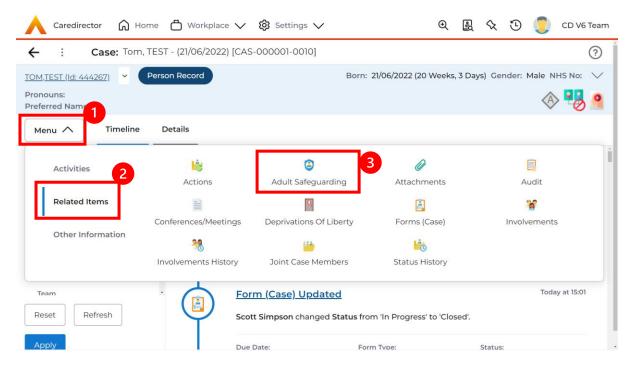
A Caredirector 🟠 Ho	ome 붭 Workplace 🗸	🔯 Settings 🗸	€ [I & O 🧵	CD V6 Tear
← : Case: Tom,	TEST - (21/06/2022) [CAS	5-000001-0010]			?
OM,TEST (1d: 444267)	Person Record	Born:	21/06/2022 (20 Weeks, 3	Days) Gender: Male I	NHS No: 🗸
Pronouns: Preferred Name				<	- 🔧 🤗
Menu 🔨 Timeline	Details				
Activities	lig:	٢	3 @	Ē	
Activities 2	Actions	Adult Safeguarding	Attachments	Audit	
Related Items		•,		1	
	Conferences/Meetings	Deprivations Of Liberty	Forms (Case)	Involvemen	ts
Other Information	**	(AA)			
	Involvements History	Joint Case Members	Status History		
Team	- For	m (Case) Updated		Tod	lay at 15:01
Reset Refresh		tt Simpson changed Status fro	om 'In Progress' to 'Closec	ł'.	
Apply	Due	Date: For	m Tvpe:	Status:	

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**.



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

Caredirector 🎧 Ho	ome 💾 Workplace	e 🗸 🔞 Setting	gs 🗸	€ <u>8</u> &	শ্ 🦉	CD V6 Team
← Case: Tom, TEST	- (21/06/2022) [CAS	-000001-0010]				?
<u>TOM,TEST (Id: 444267)</u>	Person Record		Born: 21/06/20	22 (20 Weeks, 3 Days) G	ender: Male N	IHS No: 🗸
Pronouns: Preferred Name:					Â	> 🌄 🙎
Menu 🗸 Timeline	Details					
+ 1 2~ 1	Adult Safegua	rding				
Related Records 🗸			Search for records			QG
Primary Reason	Start Date	End Date	End Reason	Created On	Created E	Ву
		No resul	RECORDS Its were found his screen.			
						,



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

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🔞 Settings	5 🗸		Q 🛃 🛇	ত 🏮	CD V6 Team
← 🖬 🔂 Adult Safeguarding: New					?
TOM_TEST (ld: 444267) Person Record			Born: 21/06/2022 (20 Weeks, 3 Days) Ger	der: Male N	IHS No: 🗸
Pronouns: Preferred Name:				Â	> 🔧 🤗
Details					
General					
Case*			Supported by advocate, family or friend		
Tom, TEST - (21/06/2022) [CAS-000001-0010]	×	Q	Yes		XQ
	~	~			
Responsible Team* CareDirectorTest		Q	Results of actions taken for risk mgmt. No risk identified and action taken		хQ
CareDirectoriest	×	Q	No fisk identified and action taken		XQ
Responsible User*			Status*		
Scott Simpson	×	Q	Additional Plan		XQ
Start Date*			Conclusion		
11/11/2022			No Police Involvement		XQ
End Date			Deprivation of Liberty		
			Yes		
Primary Reason*			O No		
Adults Safeguarding	×	Q	Discussed with Person		
End Reason			Yes		
		Q	O No		
			Person Views		
Mental Capacity					
Has mental capacity to participate in the process?			Date of assessment		
Yes		~	11/11/2022		Ê
ALLEGATIONS					
Making Safeguarding Personal					
Asked what their outcomes were?			Desired outcomes achieved?		
		Q			Q
Safeguarding Adults Review					
Safeguarding Review			Serious Harm		
		Q			Q
			L		



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**.

ound: sred Name: Datais	Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Se			॰ 🛃 🛠 🕑 🌅	-
ound: received Name: intercel ase* Supported by advocate, family or filed intercel ase* Supported by advocate, family or filed intercel aseparate CareOirectorTest Intercel Status* Status* Status* Status* Status* Intercel Additional Plan Intercel Additional Plan Intercel <	🖬 🗟 👶 🎝 i Adult Safegua	ırding: Adult Safe	guarding within Case Tom, TEST	- (21/06/2022) [CAS-000001-0010] cre	ə
	<u>4,TEST (ld: 444267)</u>		Born: 21/06,	2022 (20 Weeks, 3 Days) Gender: Male N	HS No:
Several ase* Ton, TEST - [2//06/2022] [CAS-00001-0010] ceponalble Team* CareDirectorTest careDirectorTest soott Simpson X aut Date* Tu1/2022 aut Date* Careduaion Wires pointable User* Soott Simpson X Careduaion Tu1/2022 Image: Careduaion Ves Image: Careduaion Wires Peace Careduaion Wires Peace Image: Careduaion Ves No Police Involvement Ves Ves <td>nouns: ferred Name:</td> <td></td> <td></td> <td>I I I I I I I I I I I I I I I I I I I</td> <td>0</td>	nouns: ferred Name:			I I I I I I I I I I I I I I I I I I I	0
Several ase* Ton, TEST - [2//06/2022] [CAS-00001-0010] ceponalble Team* CareDirectorTest careDirectorTest soott Simpson X aut Date* Tu1/2022 aut Date* Careduaion Wires pointable User* Soott Simpson X Careduaion Tu1/2022 Image: Careduaion Ves Image: Careduaion Wires Peace Careduaion Wires Peace Image: Careduaion Ves No Police Involvement Ves Ves <td>lenu 🔪 Details</td> <td></td> <td></td> <td></td> <td></td>	lenu 🔪 Details				
ser* Supported by advocate, family or fried Tom TEST - (21/06/2022) [CAS-000001-0010] reponsible Team* Resture of actions taken for risk mgmt. CareDirectorTest CareDirectorTest Souti Simpson Souti Simpson Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Discussed with Person Adults Safeguarding Interse Interse Interse Interse Interse Discussed with Person Interse I					
ser* Supported by advocate, family or fried Tom TEST - (21/06/2022) [CAS-000001-0010] reponsible Team* Resture of actions taken for risk mgmt. CareDirectorTest CareDirectorTest Souti Simpson Souti Simpson Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Conclusion Tu/Tu/2022 Interse Discussed with Person Adults Safeguarding Interse Interse Interse Interse Interse Discussed with Person Interse I					
Tom, TEST-(21/06/2022) [CAS-000001-0010] Q responsible Team* Results of actions taken for risk mgmt. CareDirectorTest Q No risk identified and action taken X Status* Status* Scott Simpson X Int/2022 Mo Intraste* One involvement Intraste* No One involvement X Intraste* One involvement Intraste* No Intraste No Intraste Intraste	General				
exponsible Team* CareDirectorTest CareDirectorTestorTest CareDirectorTest CareDirectorTest CareDirectorTest	Case *		Supported by advocate, family or frier	d	
CareDirectorTest Q Regonable User* Status* Status* Status* Additional Plan Conclusion ND Poice Involvement ND Person Views Intract Capacity as mental capacity to participate in the process? Date of assessment Yes Date of assessment Vers Date of assessment Vers Intract Capacity Allegations	Tom, TEST - (21/06/2022) [CAS-000001-0010]	Q	Yes		×C
sponsible User* Status* Status* Status* Status* Additional Plan X A Addition X A	Responsible Team*		Results of actions taken for risk mgm		
Scott Simpson X Q Additional Plan X X tart Date* Conclusion 1V1/2022 Image: Conclusion X Q nd Date Deprivation of Liberty Ves Image: Conclusion Y ves Image: Conclusion Ves <tr< td=""><td>CareDirectorTest</td><td>Q</td><td>No risk identified and action ta</td><td>ken</td><td>хC</td></tr<>	CareDirectorTest	Q	No risk identified and action ta	ken	хC
Latt Date* Ixint Date Ixint Date Ixint Date Ixint Date Deprivation of Libery Ixint Date Ixint Date Deprivation of Libery Ixint Date Ixint Date <t< td=""><td>Responsible User*</td><td></td><td>Status*</td><td></td><td></td></t<>	Responsible User*		Status*		
1/1/2022 Ind Date Deprivation of Liberty Image with the constraint of the process? Adults Safeguarding Image with the process? Person Views Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment	Scott Simpson	ХQ	Additional Plan		хo
1/1/2022 Ind Date Deprivation of Liberty Image with the constraint of the process? Adults Safeguarding Image with the process? Person Views Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment Yes Image with the process? Date of assessment	start Date *		Conclusion		
Adults Safeguarding Adults Sa		m			×C
Image Reason* Adults Safeguarding Adults Safeguarding Image Reason* Adults Safeguarding Image Reason* Image Reason* <td></td> <td></td> <td></td> <td></td> <td>~</td>					~
imary Reason* Adults Safeguarding X Q Discussed with Person ♥ Yes No Person Views Mental Capacity as mental capacity Yes Ves Allegations Allegations	nd Date				
Adults Safeguarding Adults Safeguarding Meesson Ves No Person Views LEGATIONS Allegations Discussed with Person Ves No Person Views Date of assessment 1/1/2022 Mental Capacity Allegations					
Addite Sateguarding Addite Sateguarding Yes No Person Views Intraction of the process? Date of assessment Yes Intraction of the process? Date of assessment Intraction of the process? Date of assessment ECCATIONS Allegations 	rimary Reason*				
Allegations	Adults Safeguarding	ХQ			
Antal Capacity Antal Capacity as mental capacity to participate in the process? Date of assessment Yes Ill/11/2022 Ill Illl <td>ind Reason</td> <td></td> <td></td> <td></td> <td></td>	ind Reason				
Aental Capacity as mental capacity to participate in the process? Ves Ves Ves 11/11/2022 ILEGATIONS I I I I I I I I III III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		Q			
as mental capacity to participate in the process? Ves LEGATIONS + Main Allegations Date of assessment			Person views		
as mental capacity to participate in the process? Ves LEGATIONS + Main Allegations Date of assessment					
as mental capacity to participate in the process? Ves LEGATIONS + Main Allegations Date of assessment					
as mental capacity to participate in the process? Date of assessment Ves 11/11/2022					
Yes ~ 11/11/2022					
LEGATIONS 1 + Allegations	Iental Capacity				
+ 🖾 🎗 🗑 Allegations			Date of assessment		
+ 🖾 🎗 🗑 Allegations	as mental capacity to participate in the process?	~			Ê
	ias mental capacity to participate in the process?	~			Ê
	las mental capacity to participate in the process? Yes	~			Ê
Allegation Date Alleged Victim Alleged Abuser Primary Category of Abuse Police have been Notified?	tas mental capacity to participate in the process? Yes LEGATIONS	~			Ê
	tas mental capacity to participate in the process? Yes LEGATIONS	~			Ê
	as mental capacity to participate in the process? Yes LEGATIONS + # Allegations		11/11/2022	Police have been Notified?	
	as mental capacity to participate in the process? Yes LEGATIONS + # Allegations		11/11/2022	Police have been Notified?	
	Allegations		11/11/2022	Police have been Notified?	
NO RECORDS	As mental capacity to participate in the process? Yes LEGATIONS +	ed Abuser	II/II/2022 Primary Category of Abuse	Police have been Notified?	
No results were found	Aas mental capacity to participate in the process? Yes LEGATIONS + I Allegations	ed Abuser	11/11/2022 Primary Category of Abuse ECORDS swere found	Police have been Notified?	
	Ass mental capacity to participate in the process? Yes LEGATIONS + I I A Allegations	ed Abuser	11/11/2022 Primary Category of Abuse ECORDS swere found	Police have been Notified?	
No results were found	LEGATIONS 1 + M & Allegations	ed Abuser	11/11/2022 Primary Category of Abuse ECORDS swere found	Police have been Notified?	
No results were found for this screen.	As mental capacity to participate in the process? Yes LEGATIONS + I I I I I I I I I I I I I I I I I I	ed Abuser	11/11/2022 Primary Category of Abuse ECORDS swere found	Police have been Notified?	0-0



	/	Q & & O (CD V6 Te
Allegation: New			
tails			
ieneral			
lleged Victim*		Alleged Abuser*	
TEST Tom	XQ		Q
llegation Details			
llegation Date *		Part of a Larger Investigation	
	₩	○ Yes	
ssociation *		No	
Community Health Care - Known to Individual	XQ	Responsible Team *	
ssociated Provider		CareDirectorTest	XQ
	Q		
Financial Abuse	XQ		₩
rimary Place of Alleged Abuse*	~ ~	Abuse Date To	
Hospital	ХQ		巤
econdary Categories of Abuse		Normal Place of Residence*	
	Q	Hospital	ХQ
ther Place of Alleged Abuse		Abuse Details	
the Place of Alleged Abuse	Q		
	~		
llegation Outcome			
elated Safeguarding Record		Outcome Details	
Adult Safeguarding within Case Tom, TEST - (21/06/2022) [CAS-0000	XQ		
utcome			
	Q		
LICE DETAILS			
LICE DETAILS Decision to Notify Police hould the Police be Notified?		Reason for Decision	
		Reason for Decision	

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



How to find a Form (Case)

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

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 S	ettings 🗸					오 읎 &	CareDirectorTest
← : Case: Tom, TEST - (21/06/2022) [CAS-00004	01-0087]						0
TOM TEST (Id: 444267) Person Record					Born: 21/06	/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
Pronouns: Preferred Nan							I I I I I I I I I I I I I I I I I I I
Menu A Timeline Details						3	
Activities 2	3	0			Ē	16	*
Actions Adult 5	Safeguarding	Attachments	Audit	Deprivations Of Liberty	Forms (Case)	Involvements	Involvements History
Related items	1						
Other Information Joint Case Members Stat	tus History						
	1						
m	±	orm (Case) Created					21/09/2022 13:04:25
Team	₽ ^	new record of form (case) was c	reated by Scott Sir	npson.			
Profession Type	D	ue Date:		Form Type: AMHP Report Form		Status: In Progress	
۵ 🕻			,	AMPP Report Form		in Progress	
(ase Involvement Updated	d				21/09/2022 12:23:12
	y s	cott Simpson changed End Date	e from 'Empty' to '2	1/09/2022'.			
		volvement Member:		tole:		Start Date:	
	с	ommunity Occupational Therapy	y Service (Occupational Therapist		21/09/2022	
(•	ase Involvement Created	I				21/09/2022 12:17:20
		new record of case involvement	t was created by So	ott Simpson.			
Reset Refresh Apply	In	ivolvement Member:	5	Role:		Start Date:	

2. Select the relevant for Form to open.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🛱	😚 Settings 🥆				• 2 4	শ্ 🏮	CareDirect	torTest
Case: Tom, TEST - (21/06/2022) [CAS-000001	-0087]							?
TOM.TEST.(Id: 444267) Person Record				Born: 21/	06/2022 (14 Weeks, 6 Day	s) Gender: Ma	ale NHS No:	\sim
Pronouns: Preferred Name:							\otimes	8
Menu V Timeline Details								
+ 💷 🎣 🗑 Forms (Case)								
Related Records V			Search for records				Q	а
Due Date Fi Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Comp	oletion Date	Signe
Due Date Fi Form Type AMHP Report Form	Start Date 21/09/2022	<u>Status</u> In Progress	Responsible User Scott Simpson	Responsible Team CareDirectorTest	Completed By	Comp	oletion Date	Signe
					Completed By	Comp	oletion Date	Signi
					<u>Completed By</u>	<u>Comp</u>	bletion Date	Sign
					<u>Completed By</u>	Comp	oletion Date	Sign
					Completed By	Comp	oletion Date	Sign
					Completed By	Comp	oletion Date	Sign



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**.

\rm Caredirector 🎧 Home 🗂 Workplace 🗸	ôð Settings 🗸			Q B & C) 🧵 CareDirector	rTest
🔶 🌶 🦸 Person: TEST Tom						0
IOM.IEST.(Id: 444267) Pronouns: Preferred Name:	1		Born: 21/0	06/2022 (14 Weeks, 6 Days) G	iender: Male NHS No:	
Menu Timeline Summary Profile + Image:	Cases Services	Document View All Ac	tivities			
Related Records		Search for re	cords		Q	G
□ <u>Responsible Team</u> <u>Responsible User</u>	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Crea
CareDirector Support	21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scot
AMHP Coordinator	20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

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

Caredirector 🞧 Hom	ne 🗂 Workplace	〜 袋 Set	ttings 🗸				• 🛃 🛠	🕒 🏮 CareDirectorTest
← : Case: Tom, T	EST - (21/06/2022)	[CAS-00000	1-0087]					0
TOM,TEST (Id: 444267) Person	n Record					Born: 21/06/2	022 (15 Weeks, 0 Day)	Gender: Male NHS No: 🗸
Pronouns:								I I I I I I I I I I I I I I I I I I I
Menu 🔨 Timeline	Details							3
Activities	i	٢		Ø	<u>_</u>	9		*
Activities 2	Actions	Adult Safeg	luarding	Attachments	Audit	Deprivations Of Liberty	Forms (Case)	Involvements
Related Items		(24)		1				
Other Information	nvolvements History	Joint Case N	1embers	Status History				
·	00							
	Ê		<u>Form (C</u>	ase) Created				21/09/2022 13:04:25
Team	٩ (A new rec	ord of form (case) was ci	reated by Scott Sim	pson.		
	x		Due Date:		Form Type:		Status:	
Profession Type	Q		Due Date.		AMHP Rep		In Progress	
	~	\perp	Case Inv	volvement Updated	4			21/09/2022 12:23:12
		*		pson changed End Date		09/2022'		
		T	Seett offici					
			Involvemen Communi	it Member: ty Occupational Therapy	Role: Occupatio	onal Therapist	Start Date: 21/09/2022	
Reset Refresh Ap	ply		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)**.

	n, TEST - (21/06/2022) [CAS-000001-0087]]				(?
<u> DM,TEST (ld: 444267)</u>	Person Record			Born: 21/06/2	022 (15 Weeks, 0 Day) Gend	er: Male NHS No: 🚿
ronouns: referred Name:						I I I I I I I I I I I I I I I I I I I
M1 1 ™ + Ø &	meline Details Details Forms (Case)					
Related Records	·		Search for record	ds		0 5
<u>Due Date</u> ≣↓	Form Type	Start Date	<u>Status</u>	Responsible User	Responsible Team	Completed By
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest	

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

A Caredian Arrow				Ð	Ę	\Diamond	5		CareDi	rectorTest
← 🖻 😼 Form (Case): New										?
TOM.TEST (Id: 444276) Person Record				Born: 24/07/	1950 (7	72 Years	5) Ger	nder: M	tale NHS	No: 🗸
Pronouns: Preferred Name: Tom									$\langle A \rangle$	0
Details										
General										
Case*			Responsible Team *							
Tom, TEST - (24/07/1950) [CAS-000001-0018]	× a	٢	CareDirectorTest						×	Q
Form Type *	_		1 ponsible User							
	0	٤								Q
Status*		_	Due Date							
In Progress	~									
Start Date*			Review Date							
21/10/2022	Ê	1								Ê
Preceding Form										
	0	2								
A al alia										



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.

Caredirector 🞧 🚹 🖞 Workplace 🗸 🐯 Settings 🗸		Q & X	🕒 🌅 CareDirecto
- 🖬 🗟 💉 🖬 : Form (Case): AMHP Report F	orm for Tom, T	EST - (21/06/2022) [CAS-000001-0087] Starting 21/09/2022 create	ed by Scott Sim
M.TEST (ld: 444267) Person Record		Born: 21/06/2022 (15 Weeks, 0 Day)	Gender: Male NHS No:
onouns: :ferred Name:			
Menu 🗸 Details			
General			
Case *		Responsible Team *	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	Q
Form Type*		Responsible User	
AMHP Report Form	Q	Scott Simpson	XQ
Status*		Due Date	
In Progress	~		m
Start Date*		Review Date	
21/09/2022	#		m
Preceding Form			

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

Caredirector 1 Home	🖞 Workplace 🤍 🚯 Settings 🗸	ए 🧕 🏷 🖱 🌷 CareDirectorTest
← 🖬 💀 🖷 📾	: AMHP Report Form	
TOM,TEST (Id: 444267) Person F	Record	Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:		
Service User Details		
Referral Details Further Details		
Background Information	Client previously known to services?	
AMHP'S Assessment of th	O Yes O No	
	O res O no	
	Ethnic Origin	
<	O White - British / Northern Irish	
	O White - Irish	
	O White - Gypsy or Irish Traveller	
	O White - Eastern European	
	O Mixed - White and Black African	
	O Mixed - White and Black Caribbean	
	O Mixed - White and Asian	
	O Mixed - Other / Multiple	



How to Allocate a Form

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

Caredirector 🎧 Home 🕻	🗋 Workplace 🗸 🔞 Settings	\checkmark		€ 8	4 & 6	9 🏮	CareDire	ectorTest
← 🖬 🗟 🖍 🖬	: Case): Adult -	Change to Service Rec	quest for Tom, TEST - (24/07/1950) [C/	AS-000001-0018] S	tarting 20	/10/2022	create	?
TOM,TEST (Id: 444276) Y Person	Print History			Born: 24/07/1950	(72 Years)	Gender: N	Male NHS I	No: 🗸
Pronouns: Preferred Name: Tom	Share							0
Menu 🗸 Details	Assign 3							
	Clone							
	Sync with PDS							
General	Restrict Access							- 1
Case*	Delete		Responsible Team *					- 1
Tom, TEST - (24/07/1950) [CAS-00	Run Workflow	Q	CareDirectorTest					Q
Form Type*	Copy Record Link		Responsible User					
Adult - Change to Service Reques	st	Q	Scott Simpson				×	Q
Status*			Due Date					
In Progress		~	27/10/2022					#
Start Date*			Review Date					
20/10/2022		曲						m
Preceding Form								
		Q						

 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.

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸	Settings 🗸	0् 🖳 🛠 🗿 🌅 CareDirectorTest
🔶 🖬 🕼 🖍 🛱 🗄 Form (Case): Adult - Change to Service Request for Tom, TEST - (24/07/195	50) [CAS-000001-0018] Starting 20/10/2022 create 🧿
TOM.TEST.(Id: 444276) Y Person Record		Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name: Tom	Teams Enter your search criteria.	la 😽 🔊
Menu V Details	Look My Teams ~ in System Views Lookup View	
General	Search My Teams Reference Data Owner Teams	
Case*		
Tom, TEST - (24/07/1950) [CAS-000001-0018]	CareDirectorTest CareDirectorTest	۹.
Form Type*		
Adult - Change to Service Request		x Q
Status*		
In Progress		*
Start Date*		
20/10/2022		·
Preceding Form		
	OK Close	
A statistics of the forward in a		



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**.

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸	ĝi Settings ∨	Ð	R	\$ 3		CareDire	ctorTest
🔶 🖬 🗟 🖍 🖨 : Form (C	ase): Adult - Change to Service Request for Tom, TEST - (24/07/1950) [CAS	.S-000001-001	8] Star	ting 20/10	/2022 c	reate	?
TOM.TEST. (ld: 444276) Person Record	Assign	Born: 24/07/	1950 (72	Years) Ger	ider: M	ale NHS N	io: 🗸
Pronouns: Preferred Name: Tom							2 오
Menu V Details	Accommodation Team						
General	Responsible User Decision *						
	Clear on current record only ~						
Case*	Include Inactive?						a
Form Type*	Related Records to Include Check/Uncheck All						
Adult - Change to Service Request	Appointment					\times	۹
Status*	Ssessment Factor						
In Progress	✓ Attachment (Case Form)					1	**
Start Date*	✓ Email						
20/10/2022	Email Attachment					1	
Preceding Form	OK Close						
a dalalar at tuda waxada w							



How to Clone a Form

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

🔨 Caredirector 🎧 Home 🗂 Workplace 🥆	/ 🔞 Settings 🗸				Q 🗒 🛇	🕚 🤵 CareDirectorT
← : Case: Tom, TEST - (21/06/2022) [C	AS-000001-0087]					(?
OMTEST (Id: 444267) Person Record ronouns: referred Nan Menu Timeline Details						i) Gender: Male NHS No: 🚿
Activities 2 kis Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions	ම Adult Safeguarding ම්ලි Status History	Attachments Audit	Deprivations Of Liberty	E Forms (Case)	F Involvements	Nuclearners History
Team Q		Form (Case) Created A new record of form (case) was created by	Scott Simpson.			21/09/2022 13:04:25
Profession Type Q		Due Date: Case Involvement Updated	Form Type: AMHP Report Form		Status: In Progress	21/09/2022 12-23:12
		Scott Simpson changed End Date from 'En Involvement Member: Community Occupational Therapy Service	npty' to '21/09/2022'. Role: Occupational Therapist		Start Date: 21/09/2022	
	۲	Case Involvement Created A new record of case involvement was crea	ted by Scott Simpson.			21/09/2022 12:17:20
Reset Refresh Apply		Involvement Member:	Role:		Start Date:	

2. Select the relevant for Form to open.

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🚳 Settings 🗸					• I ×	🕒 🌅 CareDirectorTe
Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]						?
TOM,TEST (Id: 444267) Person Record				Born: 21/	/06/2022 (14 Weeks, 6 Days)	Gender: Male NHS No: 📏
Pronouns: Preferred Name:						I 🛞 😼
Menu V Timeline Details						
+ 💷 🎗 🦉 Forms (Case)						
Related Records 🗸			Search for records			Q S
Due Date Fi Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date Si
AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		
AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		



Caredirector 🞧 Home	□ ce ∨ ĝ Settings ∨		0 हि 🛠 🖱 킻 CareDirectorTest
🔶 🖬 🗟 🖋 🖨	Form (Case): AMHP Report Form for Tom, TEST - (21/	06/2022) [CAS-000001-0087] Starting 21/09/2022 created by Scot	tt Simpson
TOM,TEST (Id: 444267) Person Reco	Print History	Born: 21/06/2	022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Share 2		I I I I I I I I I I I I I I I I I I I
Menu V Details	Clone		
General	Restrict Access		
Case *	Delete	Responsible Team •	
Tom, TEST - (21/06/2022) [CAS-00	Run Workflow	Q CareDirectorTest	Q
Form Type*	Copy Record Link	Responsible User	
AMHP Report Form		Q Scott Simpson	X Q
Status*		Due Date	
In Progress		×	m
Start Date*		Review Date	
21/09/2022			m
Preceding Form			
1		٩	
Additional Information			
Separate Assessment		Combined Carer Assessment	
O Yes		O Yes	
No		No	

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 check boxed, select **Clone.**

8 6 🖍 🗭	: Fo	orm (Case): AMHP R	eport Form for Tom, TE	ST - (21/06/2022) [CAS	-000001-0087] St	tarting 21/09/2022 create	ed by Scott Simpson		
TEST (Id: 444267) Person Record						Во	rn: 21/06/2022 (14 Weeks, 6	Days) Gender: Ma	ale NHS No:
ouns: erred Name:									\otimes
enu 🗸 Details	Clana	Form (Case)							
	Clone	Form (Case)							
General	Start D	ate of Form *							
aso *	03/1	0/2022	m						
Tom, TEST - (21/06/2022) [CAS-00									Q
orm Type*	0	Person	Case	Case Start Date	Case Status	Responsible Team	Responsible		
AMHP Report Form		TEST Tom (Primary)	CAS-000001-0010	21/06/2022 07:00	Assign To Team	CareDirector Support			XQ
atus*	4	TEST Tom (Primary)	CAS-000001-0087	20/09/2022 09:2	Assign To Team	AMHP Coordinator			
In Progress	н	✓ Page1 ▶					1 - 2		#
art Date*									
21/09/2022									6
eceding Form									
						Clor	Cancel		
Additional Information									
parate Assessment					ed Carer Assessment				
) Yes				O Yes					

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.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸		🔍 🎚 🛠 🕲 🃒 CD V6 Tei	am
🔶 👁 📮 🐻 : Form (Case): Adult Care and Supp	oort Pla	an for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022 (?
TOM,TEST (ld: 444267)		Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:	\sim
Pronouns: Preferred Name:		A	0
Menu V Details			
General			
Case*		Responsible Team*	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest Q	
Form Type*		Responsible User	
Adult Care and Support Plan	Q	Scott Simpson Q	
Status*		Due Date	
Closed	~	11/11/2022	
Start Date*		Review Date	
09/11/2022	**	() () () () () () () () () ()	
Preceding Form			
	Q		
Completion Details			
Completed By*		Completion Date*	
Scott Simpson	Q	09/11/2022	
Signed Off By*		Signed Off Date*	
Scott Simpson	Q	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.

Caredirector 🎧 Home 🗂 Workplace 🗸	ô Settings 🗸	🕀 🛃 🛠 🔁 🌅 CareDirectorTest
🔶 🖋 🦸 🤗 Person: TEST Tom		0
TOM,TEST (Id: 444267) Person Record	Born: 21/06/	2022 (13 Weeks, 3 Days) Gender: Male NHS No: ∨
Pronouns: Preferred Name:	1	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Summary Profile	Cases Services Document View All Activitie	95
Filter By	SEP 2022	
· · · · · · · · · · · · · · · · · · ·	Task Created	21/09/2022 13:42:01
From	A new record of task was created by Scott Simpson.	
(m)	Responsible Team: Responsible User:	Subject:
To	CareDirectorTest Scott Simpson	Referral has been Allocated
	Form (Case) Created	21/09/2022 13:04:25
Team	A new record of form (case) was created by Scott Simpson.	
Q		
Profession Type	Due Date: Form Type: AMHP Report Form	Status: In Progress
		21/09/2022 12:23:12
Reset Refresh Apply	Case Involvement Updated	
Reset Refresh Apply	Scott Simpson changed End Date from 'Empty' to '21/09/202	2'.

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.

Caredirector 🎧 Home 🖞	🗋 Workplace 🗸 🔞 Settings	\sim). ()	🛠 🖸 🌅	CareDirectorTest
🔶 🖋 🖣 🔗 Pers	son: TEST Tom				?
TOM.TEST (Id: 444267) Person Reco Pronouns: Preferred Name:	brd	1	Born: 21/06/2022 (13 Weeks, 3	3 Days) Gender: Mai	le NHS No: 🗸
2 Menu ∨ Timeline Sur + 如 ↔ & ★	nmary Profile Cases	Services Document View	All Activities		
Related Records	~	Search for record	ds		Q 3
□ <u>Id</u> ≣↓ <u>Person</u>	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 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.

Caredirect 4 ि Home ☐ Workplace ∨ 🕸	Settings 🗸		ତ୍ 🛃 🛠 🛈 킻 CareDirectorTest
🔶 🖬 🗟 🕹 🌲 🗄 Service Prov	vision: Tom Jones \ 220015 \ 24 Jun 2022		0
IOM,IEST.(Mr).(ld: 444276) V Person Record			Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name: Tom	Service Provision Statuses Enter your	r search criteria.	I 🕹 😫
Menu V Timeline Details Costs Per Wee	Look Lookup Records	~	
General	Search Search for records	Q B	
Person*	Name	Code	
TEST Tom	Draft	1	٩
ld*	Booking Request	20	
220015	Validation Required	30	Q
Status*	Waiting List	40 2	
Draft	Rejected	50	
	Ready for Authorisation	60	
Service Request	Page1		
Adult Residential Care		Close	x Q
Special Scheme	Finance Clier	at Category	
			· []

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**.

ome 🗋 Workplace 🗸 🔞 s	Settings 💊	/				Ð	<u>₿</u> 🛇	•	🥘 Ca	reDirectorTes
Person: TEST Tom										?
Person Record						Born: 24/07/195	60 (72 Yea	rs) Geno	ier: Male N	IHS No: 🗸
		1							A	> 👱 🔧
Summa Profile Ca	ases S	ervices Docum	ent View	/ All Act	ivities					
	sions									
Unpin from me	~			Search for re	cords					QG
Ready to Authorise	4									
Authorise		<u>Planned Start D</u>	<u>Planne</u>	ed End Da	Actual Start Date	Actual End Date	<u>Servic</u>	e Elemei	<u>nt 1</u>	
Calculate Cost Per Week		24/06/2022					Adult I	Resident	ial Care	
Cancel	equest	24/06/2022					SDS - I	WMDC N	lanaged Ac	count
Update GL Code										
Bulk Edit										
Delete										
, ,	Person: TEST Tom Person Record Summa Profile C Summa Profile C Summa Profile C Summa Calculate Cost Per Week Cancel Update GL Code Bulk Edit	Person: TEST Tom Person Record Summa Profile Cases S Summa Profile Cases S Summa Profile Cases S Cases S	Person: TEST Tom Person Record Summa Profile Cases Services Docum Service Provisions Unpin from me Ready to Authorise Authorise Authorise Calculate Cost Per Week Cancel Update GL Code Bulk Edit	Person: TEST Tom Person Record Summa Profile Cases Services Document View Summa Profile Cases Services Document View Summa Profile Cases Services Document View Ready to Authorise Authorise Authorise Cancel Update CL Code Bulk Edit	Person: TEST Tom Person Record Summa 3 Profile Cases Services Document View All Act Service Provisions Unpin from me Ready to Authorise Authorise Calculate Cost Per Week Cancel Update GL Code Bulk Edit	Person: TEST Tom Person Record Summa Profile Cases Services Document View All Activities Service Provisions Unpin from me Ready to Authorise Authorise Planned Start D Planned End Da Actual Start Date Cancel Update CL Code Bulk Edit	Person: TEST Tom Born: 24/07/95 Person Record Born: 24/07/95 Summage Profile Cases Services Document View All Activities Image Summage Profile Cases Services Unpin from me Search for records Ready to Authorise Planned Start D Planned End Da Authorise 24/06/2022 Cancel 24/06/2022 Update GL Code Bulk Edit	Person: TEST Tom Born: 24/07/1950 (72 Yea) Person Record Born: 24/07/1950 (72 Yea) Summage Profile Cases Service Document View All Activities Image: Service Provisions Search for records Ready to Authorise Planned Start D Planned End Da Authorise Planned Start D Planned End Da Calculate Cost Per Week 24/06/2022 Adult Image: Cancel Quest 24/06/2022 SDS - 1 Update GL Code Bulk Edit Sub Edit Sub Edit Sub Edit	Person: TEST Tom Born: 24/07/1950 (72 Years) Gend Person Record Born: 24/07/1950 (72 Years) Gend Summage Profile Cases Service Provisions Document View All Activities Unpin from me Search for records Ready to Authorise Planned Start D Planned End Da Actual Start Date Authorise 24/06/2022 Adult Resident n Cancel 24/06/2022 SDS - WMDC M Update GL Code Bulk Edit Update GL Code Sum Suite Search Se	Person: TEST Tom Person Record Born: 24/07/1950 (72 Years) Cender: Male N Summa 3 Profile Cases Services Document View All Activities Image: Service Provisions Search for records Ready to Authorise Planned Start D Authorise Planned Start D Planned Start D Planned Start Date Actual Start Date Service Element 1 Cancel 24/06/2022 Update CL Code Bulk Edit



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.

Caredirector	ப் Home	Workplace 🗸 🔞 Sett	ings 🗸			Q 🛃 🛇	ଓ 🏮	CareDirect	orTest
← : Serv	vice Provision:	Tom MullenTest \ A J Sc	ocial \ SDS - M	anaged Account \ Ho	ome Care \ Spot \ 2	220110 \ 08 Nov 2	022		?
MULLENTEST.Tom (Id:	444264) 🖌 🗗	Person Record			Born:	03/05/1955 (67 Yea	rs) Gender: M	ale NHS No	· ~
Pronouns: Preferred Name:			1				$\langle \! \wedge \! \rangle$		2
	imeline Detai	ls Service Deliveries	Service Deli	very Variations Co	sts Per Week Fi	nance Transaction	S		
+ 💵 🎗	Servic	e Deliveries							
Related Records	~			Search for red	cords			Q	G
Person	ld	Planned Start Ti	Units	Total Units	Total Visits	Monday	Tuesda	зу	Wedr
			NO	RECORDS					
				esults were found					
				or this screen.					

- 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 ADULT SAFEGUARDING TEAM

人 Caredirector 🛛 🔓 Home 📥 Workplace 🗸 🔞 Settings 🗸	0 🛃 🛠 🛈 킻 CD V6 Team
🗲 🖬 🙀 👶 🎝 : Service Delivery: TEST Tom \ Rea	ablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2 🧿
TOM,TEST (Id: 444267) V Person Record	Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu Variations	
General	
Service Provision*	Responsible Team*
TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 22008 Q	CareDirectorTest Q
ld*	Rate Unit*
188114	Per 1 Hours (Whole) \ Hours (Part) Q
Planned Start Time*	Units*
09:00	1.0000
Total Visits*	Total Units*
7	7.0000
Number of Carers*	
1	
Schedule applies to days	
Select All *	Thursday*
Yes	Yes
○ No	○ No
Monday*	Friday*
Yes	Yes
○ No	○ No
Tuesday*	Saturday*
<pre>@ Yes O No</pre>	Yes No
Wednesday*	Sunday*
 ▼res ○ No 	• Yes O 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

🔒 🗟 🎝 🎉 🗄 Service Provision: Tom Test \ Carer	s Trust	205632 \ ISF Provider \ ISF \ \ \ Spot \ 225727 \ 21 Oct 2022	
		Born: 03/05/1995 (27 Years) Ge	
Tom (Id: 446228) Person Record		Bom: 03/05/1995 (27 Years) Ge	nder: Male NHS NO:
erred Name: 1			
nu V Timeline Details Costs Per Week Finance Transactions			
eneral			
arson *		Responsible Team *	
Tom Test	Q	CareDirector	Q
		Responsible User*	
225727		Scott Simpson	Q
atus*			
Authorised	Q		
ervice Request			
rvice Element 1*		Service Element 2*	
ISF Provider	Q	ISF	Q

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

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

Caredirector	Workplace 🗸 🔞 Settin	ngs 🗸		९ द्वि 🔩 😒 🌷	CareDirecto	or
← ⊡ ⊡ ∴ ↓	: Service Provision	n: Tom Test \ Carers Tru	ust - 2	205632 \ ISF Provider \ ISF \ \\ Spot \ 225727 \ 21 Oct 2022	?	9
TEST.Tom (ld: 446228) Person Reco Pronouns: Preferred Name:	Unpin from me	2		Born: 03/05/1995 (27 Years) Gender: Male N	нѕ No: 🚿	5
Menu V Timeline D	Budget Position Statement Clone Calculate Cost Per Week	mance Transactions				Ì
General Person* Tom Test	Update GL Code Restrict Access Delete	с	2	Responsible Team* CareDirector	Q	
Id 225727	Run Workflow Copy Record Link			Responsible User* Scott Simpson	Q	
Status*		С	2			
Service Request				Service Element 2*		
ISF Provider Special Scheme		C		ISF Finance Client Category	Q	



👗 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 S	Settings 🗸	🔍 🛃 🛠 🛈 🌅 CareDirector
🔶 🖬 🕼 🔕 🎝 : Service Provi	sion: Tom Test \ Carers Trust - 205632 \ ISF Provider \ ISF \ \ \ Sp	ot \ 225727 \ 21 Oct 2022
TEST.Tom ((d: 446228) Pronouns: Preferred Name:	Clone Service Provision	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Menu V Timeline Details Costs Per Week	Start Date* 21/10/2022	
Ceneral	Start Reason* Change in type of care X Q	
Person*		٩
ld225727		٩
Status* Authorised		
Service Request	2	
Service Element 1*	Clone	٩
Special Scheme	Finance Client Category	

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



CAREDIRECTOR ADULT SAFEGUARDING TEAM

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**.

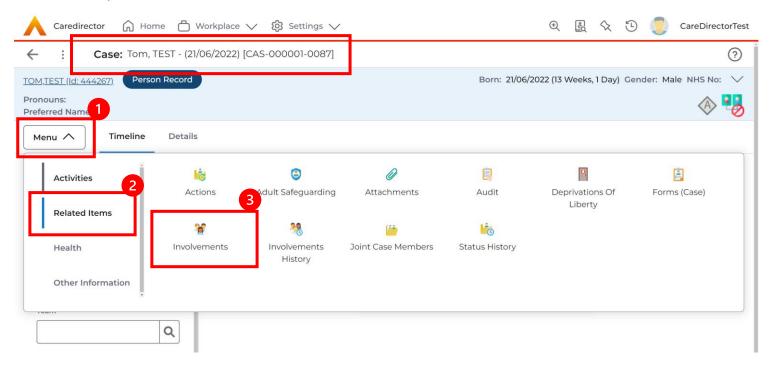
🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🕲 Settings 🗸			🔍 🎚 🛠 🕑 🌷 CareDirectorTest
	Co-ord	inatio	on Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju 🕥
TOM.TEST (Mr) (Id: 4444.			Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name: Tom			I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details Service Deliveries Service Deliver	ry Varia	tions	Costs Per Week Finance Transactions
Dates			
Planned Start Date			Planned End Date
24/06/2022			■ <mark>1</mark>
Actual Start Date			Actual End Date
		Ê	21/10/2022
Start Reason*			End Reason*
New Placement	\times	Q	Carer's Decision X Q
Commissioning			
Purchasing Team			Frequency in Weeks*
Adults Connecting Care Team East	×	Q	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.





CAREDIRECTOR ADULT SAFEGUARDING TEAM

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

Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🕚	\sim) E 🕄 🗘	ت 🌅 🖸	CareDirectorTest
Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]						?
TOM,TEST (Id: 444267) Person Record			Born: 21/06/20	022 (13 Weeks, 1 Day)	Gender: Male	NHS No: 🗸
Pronouns: Preferred Name:						la 🖓 🛞
Menu V Timeline Details						
+ 💵 🎗 🗑 Case Involvements						
Related Records V		Search for records				ର <u>ଅ</u>
□ Involvement Member = Role Involvement Re	Case		<u>Responsible Team</u>	<u>Start Date</u> ≣↓	End Date	<u>Create</u>
Community Occupatio Occupational Th	Tom, TEST - (21/06/2022) [C	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.

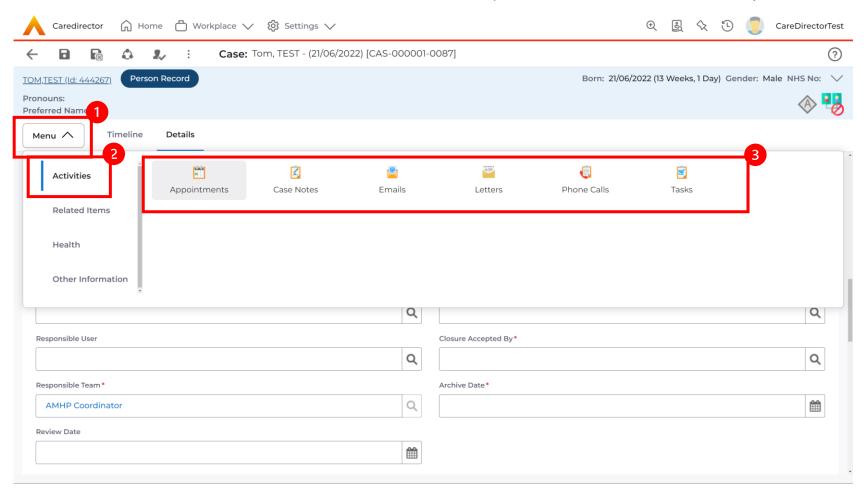
Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings	\sim	⊕. <u>E</u>	🛠 🛈 🥊 CareDirectorTes
- 🖬 🔝 🔹 🎝 : Case Involvement:	Case Involvement with	n Case Tom, TEST - (21/06/2022) [CAS-000001-0087] create	ed by Scott Simpson o 🤅
Menu V			
General			
Case*		Responsible Team *	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	Q
Person*		Involvement Priority	
TEST Tom	Q		Q
Involvement Member*		Involvement Status	
Community Occupational Therapy Service	Q		Q
Role*		End Date	
Occupational Therapist	Q	21/09/2022	#
Start Date*		Involvement End Reason	
21/09/2022			Q
Involvement Reason	4	Involvement Review Date	
	Q		
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.





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

	Caredirector 🎧 Home 🗂 Work	xplace 🗸 🔞 Settings				Ð	<u>r</u>		CareDirectorTest
\leftarrow	Case: Tom, TEST - (21/06/2022) [[CAS-000001-0087]							?
<u>tom,te</u>	EST (Id: 444267) Person Record					Born: 21/06/2022 (13	Weeks, 1 Day	/) Gende	r: Male NHS No: 🗸
Pronou Preferr	uns: red Name:								I I I I I I I I I I I I I I I I I I I
Men	u 🗸 Timeline Details								
+	🕼 🎗 🗑 Tasks								
Relat	ted Records 🗸 🗸			Sea	rch for records				ର ଓ
	Subject	<u>Due</u> ≣↓	<u>Status</u>	<u>Regarding</u>	g <u>Reason</u>	Re	esponsible Te	eam	<u>Responsible User</u>
	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom, TEST	- (21/06/2022)	Ca	reDirectorTe	est	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.**

Caredirector 🞧 Home	^C (1) ^{kplace} ∨ ⁽²⁾ / ₍₂₎ Settings ∨	🔍 🖳 🛠 边 🌅 CareDirectorTest
← 🖬 🗟 🎝	: Task: Referral has been Allocated	?
TOM,TEST (Id: 44426 3 Person Rec	Clone 2	Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Complete	I I I I I I I I I I I I I I I I I I I
Menu V Details	Cancel Restrict Access	
	Delete	
General	Run Workflow	
Subject*	Copy Record Link	
Referral has been Allocated		
Description		
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		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**.

Caredirector 🎧 Home 🗂 Work	place 🗸 🔞 Settings 🗸	🔍 🛃 🔨 🕛 CareDirectorTest
🔶 🖬 🗟 🕹 😣 🗄	Case: Tom, TEST - (21/06/2022) [CAS-000001-008'	7]
TOM,TEST (Id: 444267) Person Record		Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:		A 🛃
Menu 🗸 Timeline Details		
	~	
Assignment Information	2	
Case Status*		
Assign To Team	X Q	
Case Priority		
	Q	
Responsible User		
	Q	
Responsible Team*		
AMHP Coordinator	Q	
Review Date		
	m	



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

人 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:	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details	
~	
Assignment Information	
Case Status*	
Assign To Team	
Case Priority	
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Responsible User	
Q	
Responsible Team*	
AMHP Coordinator Q	
Review Date	



CAREDIRECTOR ADULT SAFEGUARDING TEAM

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

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🔶 🖬 🖹 🔕 🎝 i Case: Tom, T	rest - (21/06/2022) [CAS-000001-0087]	?
TOM,TEST (ld: 444267) Person Record	116	n: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Case Statuses Enter your search criteria.	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details	Look Social Care Case Status Lookup View 🗸	
	Search for records Q 3	
Assignment Information	Name ≟↓ Code Gov C □ Awaiting allocation (unscheduled revi ^	
Case Status*	Closed	
Assign To Team	Closed & Logged As Enquiry	
Case Priority	Closed as a Contact	
	Closed Under Review	
Responsible User	Closure Request Rejected	
	Closure Requested	
	, Factor in the distribution of the set of 	
Responsible Team*	M A Page 1 1-13	
AMHP Coordinator		
Review Date	OK Close	



4. 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.**

Caredirector 🎧 Home 🗂 Workplace 🗸 🏟 Settings 🗸	ove mouse to top of screen or press FI1
← 🖬 🛱 & I ← : Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]	
TOM,TEST (Id: 444267) Person Record	Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	In the second
Menu V Timeline Details	
Assignment Information	
Case Status*	Close Date*
Closed X	Q 03/10/2022 🛍 13:43 🛇
Case Priority	Closure Reason*
	Q All Work Completed X Q
Responsible User	Closure Accepted By*
	Q Scott Simpson X Q
Responsible Team *	Archive Date *
AMHP Coordinator	Q 28/10/2022
Review Date	
Last Assigned to Team Date	
20/09/2022	
Other Information	
Re-Referral	Non-Migrated Worker Name

5. 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**.



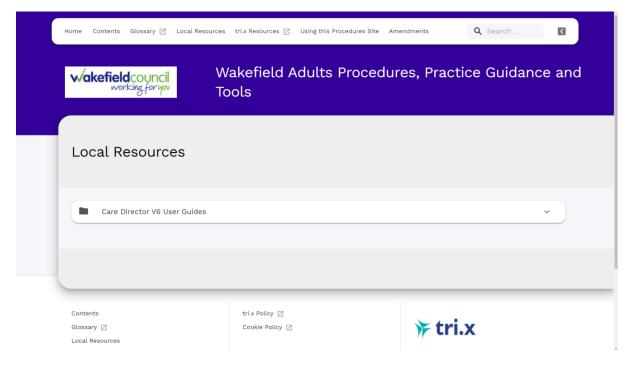
CAREDIRECTOR ADULT SAFEGUARDING TEAM

Further CareDirector Guidance

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