



Raise a System Support Request Guide V1.2

Document	Raise a System Support Request Guide
Purpose	The purpose of this guide is to support system users in raising a request (Support or Issue)
Version	V1.2
Owner	ICT & Business Transformation Team / System Support Team
Last Updated	24/7/2024

Contents

How to “Raise a Support/Issue Request”	3
Caredirector Requests	3
Pathways To Care (P2C) Requests	6
CM Requests	7

How to “Raise a Support/Issue Request”

Raising a Request

1. To raise a request or submit an issue, please log onto [Tri-X](#).
2. Click **Local Resources > Adults System Support | Support/Issues Requests**, then click the relevant link.
3. Just follow the onscreen instructions and click submit when ready.

Note: there is a separate link for external users (Mental Health Teams) and Internal Users.

4. All users can raise a request through TRI-X however Internal Users will also have the ability to raise **System Support/Issue Requests** via the [intranet](#).

5. Once you’ve clicked on the appropriate link, then enter your details. This will include **Forename, Surname, Work Email, Contact Number, Best Time to Contact You, Team and Team Manager**. Note: External users will have input these details in each time due to not having Wakefield Council’s intranet access. Internal users should find their details pre populate.

Adults Support Request

[Your Details](#)[Support Request](#)

6. You then need to choose which system the support/issue relates to.

QHD Adults Support Request

[Your Details](#)[Support Request](#)[Summary](#)

System *

[Caredirector](#)[Pathways to Care](#)[CM](#)[BetterCare](#)

Caredirector Requests

1. Select **Caredirector** and choose the section it relates to.

System * ✓

Caredirector Pathways to Care CM BetterCare

CareDirector - Support *

Password Reset/Access Issues Deletion Request Lock Down Request
 Merge Request Re-Open Request Existing User Training
 New Starter Training Request Finance Support
 Homescreen/Dashboard & Report Requests
 System Access Request - External or Non-Adults Teams Leaver
 Change Request Update to Guidance (Tri.x) Keying Care Providers
 Other Request

a) Password reset/ Access Issues – Use this if you are having any issue access the system.

b) Deletion Request – This is when the user can ask for a number of different elements to be deleted. This includes forms, attachments, activities, cases, service provisions etc.

c) Lockdown Requests – This is when a user (usually a manager, safeguarding etc) requests that a person record or a particular case is restricted for a system user. In Caredirector this is known as “Data Restrictions”.

d) Merge Request – This is when there are maybe 2 or more records for the same person. The user may request to merge all these together.

e) Re-Open Request – This is when a user may request to re-open either a case, from, activity or safeguarding record.

f) Finance Support – This is when a user can request either training support specific to finance areas like Service Provisions, Unit Rates etc or raise a system issues relating to finance areas that need investigation. Areas to choose from are Service Provisions, Service Deliveries/Variations, Finance Transactions, Financial Assessments, Finance Invoices, Personal Budgets, Invoice Batches, Rate Units and Cost per week.

g) Existing user training – to request refresher training for users who require it, or who may have changed roles etc.

h) New Starter Training Request – This is when we get a new starter needs to be added into the system. It will include details of their team and manager and will also specify their requirements for training.

i) Homescreen/Dashboard and Report Requests – This is when users can request support/issues for either dashboard views, homescreen views or advanced search views.

j) System Access Requests – External or Non-Adults Teams – this is for a situation where users from outside Wakefield Council Adult Social Care are requesting access.

k) Leaver – To request user's access to be removed when they leave their role.

l) Change Request – This is when users, superusers or managers want to request a change to the system that may need further development.

m) Update to Guidance (Tri-X) – to request any changes to the guidance documents on Tri-X.

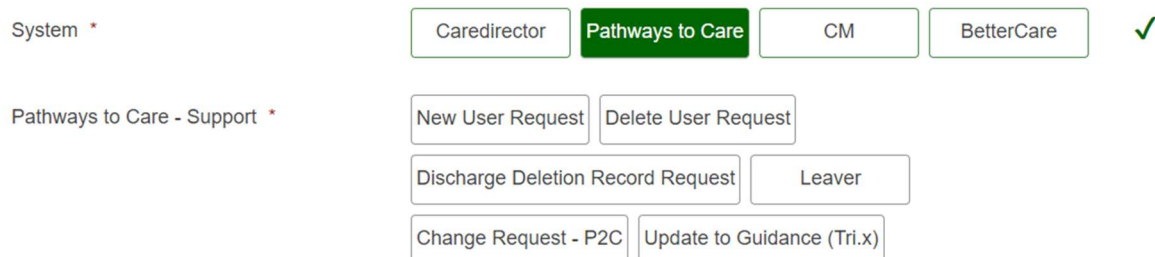
n) Keying Care Providers – to request any new providers to be added to CareDirector, or any new service options to be added to existing providers.

o) Other Request – This is when users have a request that falls outside the above options. These requests will need further investigation and allows the user to describe the request in more detail.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

Pathways To Care (P2C) Requests

1. Select **P2C** and choose the section it relates to.



The screenshot shows a web interface for raising a system support request. Under the heading "System *", there are four buttons: "Caredirector", "Pathways to Care" (which is highlighted in green), "CM", and "BetterCare". To the right of these buttons is a green checkmark. Below this, under the heading "Pathways to Care - Support *", there are six buttons arranged in three rows: "New User Request", "Delete User Request", "Discharge Deletion Record Request", "Leaver", "Change Request - P2C", and "Update to Guidance (Tri.x)".

a) New User Request – This is when we get a new starter needs to be added into the system. It will include details of their team and manager and will also specify their requirements for training.

b) Delete User Request – This is when a manager can request for a user to be removed from P2C access. This could be because they have change roles or moved departments and therefore don't require access anymore.

c) Discharge Deletion Record Request – This is when a user can request the deletion of a discharge record. This can be because it's duplicated by mistake or entered in error.

d) Leaver – to remove user's access when they leave their role.

e) Change Request – This is when a manager or superuser can request a change to the system or set up. This will need to be allocated to a Development Officer and will required further investigation, meetings and discussion.

f) Update to Guidance (Tri-X) – to request any changes to the guidance documents on Tri-X.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

CM Requests

1. Select **CM** and choose the section it relates to.

System * ✓

Caredirector
Pathways to Care
CM
BetterCare

CM - Support *

Password reset / Access Issues
New Starter Training Request

Existing User Training
Deletion Request
Look Up Request

Permission Change Request
Leavers Request
Report a Technical Issue

Leaver
Change Request
Update to Guidance (Tri.x)

Other Requests

a) Password reset/ Access Issues – Use this if you are having any issue access the system.

b) New Starter Training Request – This is when we get a new starter who needs to be added onto the system and trained.

c) Existing User Training – This is when a system user has been trained but requires more training. Requests can be made this option.

d) Deletion Request – This is when one of the following needs to be deleted (Carer/ Service User/Rota. These request can only come from a Manager.

e) Look Up Request – This is when a look up either needs adding, updated or deleted.

f) Permission Change Request – This is a system user permissions need changing.

g) Leavers Request – This is when a system user (staff or carer) leaves. Please let us know so we can make arrangements to disable access when they leave.

h) Report a Technical Issue – This is when a user has an error message, or a system technical issue occurs. Please give as much detail as possible.

i) Other Request – This is when users have a request that falls outside the above options. These requests will need further investigation and allows the user to describe the request in more detail.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

Version Control

Version Number	Change	Author	By Date
V1.0	INITIAL START	Pete King	05/12/2022
V1.1	Added in CM requests and overview for each section	Pete King	20/11/2023
V1.2	New options added across all systems. Best time to contact you added.	SCJ	24/7/2024