



Hospital Social Work Team V1.0

Document CareDirector Hospital Social Work Team.

Purpose Hospital Social Work Teams daily tasks on CareDirector.

Version V1.0

Owner ICT Business Transformation Team

Last Updated 11/11/2022



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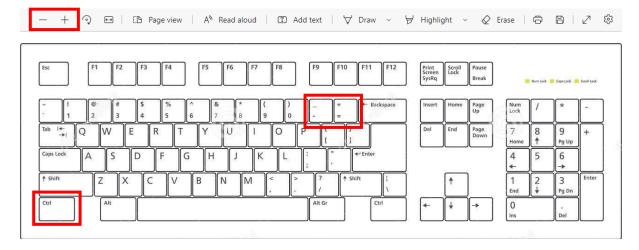
Guide Information

Before Live Access...

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

Guide Navigation

- 1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
- 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.

- + 🤉 🚥 | 🗈 Page view - A^N Read aloud | 🗊 Add text | 🖓 Draw 🗸 😾 Highlight 🗸 🖉 Erase | 🛱 🖺 | 🖉 🍪



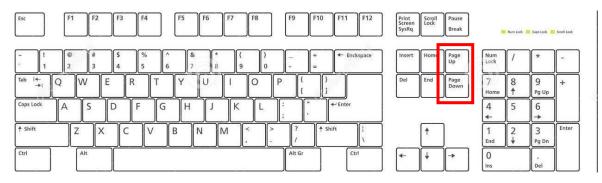
4. For auditory assistance, select Read Aloud from the toolbar.

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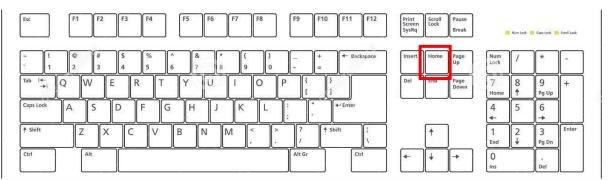
5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

11 2 of 20 Q,	- + Q E3 [25 Repriver At Read Wood 23 Adstent V Div	w ~ ∀ Highlight ~ Q Ersse ⊖ 🛛 e ⁿ 🛞
	CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING	
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6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to "jump" up and down a page.



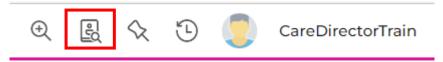
7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.





How to search for a Service User

1. Select the Person Search icon on the Navigation Menu



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

	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).

Cared 🚹 🔓 Home 🗂 Workp	lace 🗸 🔞 Settings 🗸			0 8 2 2	CareDirectorTes
+ / / Person: TES	ST Tom				0
IOM,TEST (ld: 444267) Person Record			Born: 21/06/202	2 (15 Weeks, 0 Day) Ge	nder: Male NHS No: 🗸
Pronouns: Preferred Name:					I 🖓 🥵
Menu V Timeline Summary	Profile Cases Ser	ices Document View	v All Activities		
Filter By	OCT 202	2			
~	Eorm (Case) Created			Yesterday at 15:05
From	A new re	cord of form (case) was cre	eated by Scott Simpson.		
#	Due Date		Form Type:	Status:	
То	Due Date		AMHP Report Form	In Progress	
m		Devision Created			Yesterday at 10:12
Team		Provision Created			restorday at 10.12
Q	A new re	ord of service provision w	as created by Scott Simpson.		
Profession Type	Actual Sta	t Date:	Service Provided: Co-ordination Team \ SDS - WMDC	Status: Draft	
٩			Managed Account \ Home Care \ Spot		
	SEP 202	2			
	Task C				28/09/2022 13:58:47
		cord of task was created by	v Scott Simpson		
Reset Refresh Apply	T A new re	ord or task was created by	y scott simpson.		

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 add relationships

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

Caredirector 🞧 Home 🗂 Workplace 🗸 😫 Settings 🗸	0 🛃 🛠 🐌 🌅 CareDirectorTest
Person: TEST Tom	0
TOM TEST (Id: 444267) Person Record Born: 21/06/20	022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
Pronouns: Preferred N	I I I I I I I I I I I I I I I I I I I
Menu A Timeline Summary Profile Cases Services Document View All Activities	
Activities Relationships Genogram Relationship Wizard	
Related Items 3	
Health	
Mental Health Act	
Work and Education	
Other Information	
Finance	
Care Network	
A new record of service provision was created by Scott Simpson.	
	Status: Draft
Reset Refresh Apply	

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

<u> Caredirector</u> 🎧 Home 📇 Workplace 🗸 🛞 Settings 🗸	0् 🧕 🛠 🕐 🌅 CareDirectorTest									
🔶 🖋 🦸 Person: TEST Tom	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									
Timeline Summary Profile Cases Services Document View All	I Activities									
+ 💷 🎗 🗑 Person Relationship	+ 💷 🎭 🗑 Person Relationship									
Related Records V	Search for records									
Related Person Relationship Inside Household Family Member	Primary Carer Start Date End Date									

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



Person Relationship: New			
M_TEST (Id: 444267) Person Record		Born: 21/06/2022 (14 Weeks, 6 Days) Gend	der: Male NHS No
nouns: ferred Name:			A
Details			Ť
Relationship to Other Person			
rimary Person*			
TEST Tom			×
a*			
Brother			×
o*			
Tom MullenTest			×
Reciprocal Relationship			
rerson			
Tom MullenTest			
a*			
Brother			×
0			
TEST Tom			
03/10/2022	-0-0-		
	曲	CareDirectorTest	×
nd Date		CareDirectorTest	×
		CareDirectorTest	×
		CareDirectorTest	X
		CareDirectorTest	
		CareDirectorTest	× •
Pescription		CareDirectorTest	
escription Hature of Relationship to Primary Person			
escription Hature of Relationship to Primary Person		Primary Carer	
escription Nature of Relationship to Primary Person		Primary Carer	
escription Nature of Relationship to Primary Person			
escription Nature of Relationship to Primary Person Iside Household		Primary Carer Powers of Attorney	
Nature of Relationship to Primary Person		Primary Carer	
Nature of Relationship to Primary Person nside Household amily Member lext of Kin		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs	
Nature of Relationship to Primary Person nside Household amily Member lext of Kin		Primary Carer Powers of Attorney	
Nature of Relationship to Primary Person Naide Household amily Member lext of Kin mergency Contact		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs	
Nature of Relationship to Primary Person Naide Household amily Member lext of Kin mergency Contact		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs	
Nature of Relationship to Primary Person Naide Household amily Member lext of Kin mergency Contact		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs Financial Representative	
Vescription Vature of Relationship to Primary Person vside Household amily Member lext of Kin mergency Contact ley Holder		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs Financial Representative	
Description Nature of Relationship to Primary Person nside Household Family Member Family Member Finergency Contact Finergency Finergen		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs Financial Representative Voung Carer	
Description Nature of Relationship to Primary Person nside Household amily Member amily Member kext of Kin key Holder key Holder key Holder		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs Financial Representative Voung Carer	
End Date Description Nature of Relationship to Primary Person nside Household Family Member Family Member Family Member Famergency Contact Famerge		Primary Carer Powers of Attorney Power of Attorney for Property and Financial Affairs Financial Representative Voung Carer Legal Cuardian	

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



How to Enter Date of Death

Caredirector	Home 🗂	Workplace 🗸	ැබූ Settings	\sim	€ [<u>ال</u> کې ل	D 🜅	CareDirector
< 🖊 👌 é	9 Persor	n: Test Tom						?
<u></u> ,	Person Record			Born	: 03/05/1996 (26	Years) Gen	der: Male 1	NHS No: 🗸
Pronouns: Preferred Name:								A 😼
Menu 🗸 Time	line Summ	ary Profile	Cases	Services	Document Vi	ew All	Activities	
Filter By			<u>(Case) Crea</u>		eated by Scott S	impson.	Yester	day at 11:12
То	≝ < ₩ .	Due Da 20/11/20		Form DoLS	_{Type:} Tracker - Cat 2	Statu In Pr	is: ogress	
Reset Refresh		s)	Created record of task	was created b	by Scott Simpson	n.	Yestero	day at 11:08

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

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

Caredirector	Home	💾 Work	place 🗸	😥 Setting	gs 🗸	Ð	ł	\Diamond	ত 🧧	CareDirector
← 8 ₽	ټ ۵	:	Person:	Test Tom						?
<u>TOM,Test (ld: 446229)</u> Pronouns: Preferred Name:	Person Red	cord			В	orn: 03/05/199	96 (26 Ye	ears) Ge	ender: Ma	le NHS No: V
Death Informat	tion									
Deceased					Cause of Deat	h				
• Yes										Q
O No					Place of Death	1				
Date of Death										
					[

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



How to add a Contact

- A Referrer will Contact Wakefield Council to issue a new Case. This Contact is a simple capture of a Case without a Service User being on the system. This will be Triaged into a Service User and Case onto CareDirector, or it will be Closed before this.
- 2. To create this **Contact** select **Workplace**. Then select **My Work** and **Contact**.

My Work	Dashboard	Reports	People	(à) Cases	Eorms (Case)	<u> </u>	Professionals
Finance 2	🛃 My Diary	2 Contacts	Carer Exemption And Extension				
ι Γ				+ <i>C</i>			
Due Date: 09/04/2 Case: Robert Herb	023 ert, DOB: 05 Mar 2001 (Ref	No: CAS-48646-0W5D7	c)				
Ø 2 ⁷							
Due Date: 10/03/20 Case: Dean Callery	023 r, DOB: 27 Mar 2000 (Ref No	p: CAS-124484-BD1G05)					
Ø 2 ⁿ					NO REC	CORDS	
Due Date: 20/10/20 Case: TEST, Rachel	022 - (03/11/1983) [CAS-000001-	-0076]			No results v for this		
Ø 2 ⁿ							
		00001-00011					
Due Date: 12/10/20 Case: Pass, Smoke	TestPerson629 - (#) [CAS-00						

3. From this screen, select either an existing **Contact** or create a new one by selecting **Create New Record** from the toolbar.

	Caredire	ector	ы	ome	🗂 Wor	kplace 🗸 😥	Settings 🗸				+ <u>e</u>	🛠 🖱 🌅 Ca	reDirectorTest
\leftarrow	+	×	<i>4</i> 9	2,	:	Contacts							0
Act	tive Conta	1		v	,		I		Search for re	cords			C C
	Contact I	ld	Co	ontact T	ype	Contact Status	Regarding	Date	/Time Co 🕫	Contact Reason	Presenting Prior.	<u>Responsible Team</u>	Created
	CON-2		Te	lephone	9	Mock pending	т	04/0	7/2022 13:39:	A - Advice and informat	Amber	CareDirectorTest	Jayne N
	CON-1		Te	lephone	9	Triage in progr	ess Jayne Test	17/06	6/2022 00:00	A - Assessment of needs	Priority 1 - Urgent	Adults Triage Team	a Jayne N



4. From the **Contact** creation screen, if later this **Contact** becomes **Triaged**, and the **Service User** is created into CareDirector then the **Regarding** field can be linked to that person. Once the information has been entered, select **Save** from the toolbar.

Contact: New					
etails					
etails					
Contact Information					
Contact Id*				Responsible Team*	
				CareDirectorTest	X Q
Regarding				Responsible User	
			Q	Scott Simpson	XQ
Date/Time Contact Received *				Contact Type*	
04/10/2022	#	09:00	 0	Telephone	XQ
- 1, 10, 2022		00.00	U		
Contact Source					
Contact Source				Contact Made By (Free text)	
Health - Hospital			×Q	DR TAYLOR	
ontact Made By					
			0		
Contact Made By			Q		
			 ٩		
			 Q		
Contact Details			٩	Presention Nearl*	
Contact Details				Presenting Need*	
Contact Details Contact Resson* A - Assessment of needs			Q X Q	Presenting Need*	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority*			XQ		
Contact Details Contact Resson* A - Assessment of needs				Needs are to be assessed.	
Contact Details Contact Resson* A - Assessment of needs Presenting Priority*			XQ	Needs are to be assessed.	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority*			XQ	Needs are to be assessed.	
Contact Details Contact Reason* A - Assessment of needs resenting Priority* Amber			XQ	Needs are to be assessed.	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber			XQ	Needs are to be assessed.	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status*			× Q	Needs are to be assessed.	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes			XQ	Additional Information	C
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status* New Contact- pending Triage			× Q	Additional Information	C
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status* New Contact- pending Triage			× Q	Needs are to be assessed. Additional Information	C
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status* New Contact- pending Triage Contact Outcome			× Q × Q	Needs are to be assessed. Additional Information	C
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status* New Contact- pending Triage Contact Outcome			× Q × Q × Q	Needs are to be assessed. Additional information Route of Access Other Actions Date/Time Contact Assigned	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status*			× Q × Q	Needs are to be assessed. Additional Information	
Contact Details Contact Reason* A - Assessment of needs Presenting Priority* Amber Contact Status and Outcomes Contact Status* New Contact- pending Triage Contact Outcome			× Q × Q × Q	Needs are to be assessed. Additional information Route of Access Other Actions Date/Time Contact Assigned	



How to find a linked Contact

1. Locate the Person Record and select Menu, Related Items and then Contacts.

A Caredirector 🔓 ⊢	lome 💾 Workplace 🗸	ĝ Settings ∨	Ð.	🛠 🗓 🌷 CD V6 Team
- 1 4 0	Person: TEST Tom			0
TOM,TEST (1d: 444267)	Person Record	Borr	n: 21/06/2022 (20 Weeks, 3 Days	i) Gender: Male NHS No: 🗸
Pronouns: Preferred Name				I
Menu 🔨 Timeline	Summary Profile	Cases Services	Document View All Acti	vities
Activities 2		Q	B	-
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)
I I I I I I I I I I I I I I I I I I I	0		20	2
Health	Attachments	Audit	Complaints And Feedback	Contacts
Mental Health Act	2	é	0	
Work and Education	Forms (Person)	Primary Support Reasons	Subject Access Requests	
Other Information	•			×

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

Image: Contacts Person: TEST Tom TOM.TEST (Id: 444267) Person Record Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male N Pronouns: Preferred Name: Menu V Timeline Summary Profile Cases Services Document View All Activities + Image: Contacts	⑦ HS No: ∨
Pronouns: Preferred Name: Menu Timeline Summary Profile Cases Services Document View All Activities	HS No: 🗸
Preferred Name:	
	-0 🔳
+ 💷 ờ 🎝 🗑 Contacts	
Related Records V	Q G
Contact Id Contact Type Contact Status Regarding Date/Time Contact R 🖡 Contact R	tact Reason
CON-2 Telephone Mock pending Triage TEST Tom 04/07/2022 13:39:00 A -	Advice and ir



How to add an Activity to a Contact

- 1. Locate the Contact,
 - a. Unlinked Contact: Workplace, My Work and then select Contacts.
 - b. Linked Contact: Menu, Related Items, Contacts.
- 2. Select Menu, then Activities and select the relevant Activity.

Caredirector 🟠 Hor	me 💾 Workplace	∨ 🕅 Settings √	/	€ <u>8</u> &	🖸 🏮 CD V6 Team
← 🖬 🖬 û	와 : Cor	ntact: Telephone for	r TEST Tom received	04/07/2022 referred	by Individuals ၇
TOM,TEST (Id: 444267)	Person Record		Born: 21/06/202	22 (20 Weeks, 3 Days)	Gender: Male NHS No: 🗸
Pronouns: Preferred Name					🚸 🔧 🔗
Menu 🔨 Details					
Related Items	Appointments	🔀 Case Notes	Emails	Letters	U Phone Calls
Activities	I asks				
Regarding			Responsible User		
CEST Tom		Q	Jayne Mullen		XQ
Date/Time Contact Received *			Contact Type*		
04/07/2022	13:39	0	Telephone		×Q

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

Caredirector 🟠 Ho	ome 📋 Workplace 🗸 🔞 Se	ettings 🗸	€ § <>	x 🕑 킻	CD V6 Team
← Contact: Teleph	one for TEST Tom received 04/0	7/2022 referred by Ind	ividuals - Family/Friend/N	eighbour	?
<u>TOM,TEST (Id: 444267)</u>	Person Record	Born: 21/	06/2022 (20 Weeks, 3 Days)	Gender: Male N	IHS No: 🗸
Pronouns: Preferred Name:				Â	> 🔧 🙎
Menu 🗸 Details					
+ 4 2, 🛛	Tasks				
Related Records	~	Search for re	cords		Q 3
Subject	Due	Status	Regarding	Reason	

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



How to link a Contact to a Person Record

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

🔨 Caredirector 🎧 Home 🖨 Workplace 🗸 🕸 Settings 🗸	🔍 🛃 🔨 🧓 CareDirectorTest
🔶 🖬 🗟 🎝 🎝 Contact: Telephone for Unknown received	04/07/2022 referred by Individuals - Family/Friend/Neighbour
TOM,TEST (ld: 444267) Person Record	Born: 21/06/2022 (15 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 V Details	
Contact Information	
Contact Id*	Responsible Team *
CON-2	1 CareDirectorTest Q
Regarding	Responsible User
L TEST Tom X Q	Jayne Mullen X Q
Date/Time Contact Received *	Contact Type*
04/07/2022	Telephone X Q
Contact Source	
Contact Source	Contact Made By (Free text)
Individuals - Family/Friend/Neighbour X Q	Mr Smith (neighbour)

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

A Caredian Anne 🗅 Workplace V 🕸 Settings V	€	<u>الم</u>	\Diamond	3		CareDirector	Test
🔶 🖬 👪 🔕 🎭 : Contact: Telephone for Unknown received 04/07/2022 referred by Individuals - Family/F	riend/	Neigh	bour			(୭
TOM.TEST. [ld: 444267] Person Record Born: 21/06/202	22 (15 V	Veeks,	3 Days	Gend	er: Ma	e NHS No: `	\sim
Pronouns: Preferred Name:						<u>ې چې</u>	0
Menu V Details							
Some data is not correct. Please review the data in the Form.							
Individuais - Family/Friend/Neighbour X Q Mr Smith (neighbour)							
Contact Made By							
Is the Person/Group aware of the Contact?* Does Person/Group agree/support this Contact?*							1
Yes v Yes						~	
Is Parent(s)/Carer(s) aware of this Contact							11
×							
Is N.O.K/Carer aware of this Contact?							
~							



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

1 4 8	Person: TEST Tom						
1 <u>,TEST (ld: 444267)</u> Perso	on Record	-			Born: 21/06/2022 (15 Weeks, 3 Days) Gender: Male NHS No:
nouns:							$\langle A \rangle$
enu 🔨 Timeline	Summary Profile	Cases Servi	ces Document Vie	w All Activities			
Activities		Q	B	Щ	Ø	Ē	20
Related Items	Addresses 3	lerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments	Audit	Complaints And Feedback
	2,	a	é	9			
Health	Contacts	Forms (Person)	Primary Support Reasons	Subject Access Requests			
Mental Health Act							
Work and Education							
Other Information							
Finance							
Care Network							
		Actual Start	Date:	Service Provided	: Feam \ SDS - WMDC	Status: Draft	



How to create a Person Record Duplicate Detection

- 1. Before a **Person Record** can be created a **Person Search** must be done.
- 2. If **Person Record** is present, after you select the **Create New Record** it will show a warning.
- 3. If No Record is present, the **Searches Before Create Allowed** will turn to 0 and the grey **Create New Record** button will be **highlighted** on the toolbar.

\leftarrow		Searches Before Create Allowed : 1
Firs	t Name	^
Mid	dle Name	

4. Select the **Created New Record** button and create a Person record.





Adding a Person Record

1. Select **Person Search** on the toolbar.



2. Search person to check for record.

- + Searches Be	efore Create Allowe	d :
First Name		
Tom		٦
Middle Name		
		٦
Last Name		
MullenTest		٦
Stated Gender		J
	~	٦
NHS No.		
		٦
DOB		
	Ê	
Use Date of Birth Range		
Date of Birth From		
	Ê	
Date of Birth To		
	£	

It is required of users to perform at least one search of an existing Person Records before they can create a new one.

3. If an existing record is not found, select the now highlighted **Create new record** button on the toolbar.

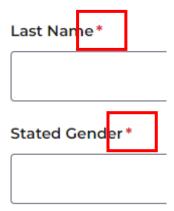




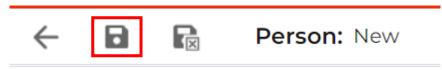
4. The Person: New record is displayed.

🗧 🖬 🖬 Person: New	0
Detalis	
ld	Profile Picture
Tite	2
First Name	Choose file Browse
Middle Name	Ethnicity*
	٩
Last Name*	Marital Status
	٩
Stated Gender*	
~	
Cender Same as Birth Cender	
DOB and Age*	

5. Complete the fields as required. Mandatory fields are marked with a red asterisk.



6. When the information has been entered, select the **Save** button on the toolbar.





A Caredirector 🕞 Home 🗂 Wo	0 4 2 3	CareDirectorTrain				
← / ∮ ⊘ Person:	Tom MullenTest					0
Person Record MULLENTESTTom (Mr).(id: 2) Preferred Name:					Born: 03/05/1912 (110 Years) G	ender: Male NHS No:
Menu V Timeline Summary From	y Profile Case	÷	s Services Document View All Ac erson Address Created new record of person address was created by So	tivities ott Simpson.		20/05/2022 08:09:14
To	 _ Q (Pri	Idress Type: Imary erson Created new record of person was created by Scott Simp	Property Type: Privately Owned son.	Street Street and Broadway	20/05/2022 08:09:14
Profession Type Refresh Apply	Q.	Ag 110		Hame Phane: No more records to display	Mobile Phone: 212-970-4133	

7. The Person Record will then be displayed.



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**.

Caredirector 🞧 Hor	me 📋 Workplace 🗸	段 Settings 🗸		€	R 🛇	ت 🗓	CareDirectorTest
← ∥ ⋕ ⊘	Person: TEST Tom	1					?
TOM,TEST (Id: 444267) Perso Pronouns: Preferred Name:	on Record		Born: 21/06	6/2022 (15 W	Veeks, 0 Day)	Gender: Ma	ale NHS No: 🗸
Menu V Timeline	Summary Profile	Cases Services	Document View All Activiti	ies			
From		Form (Case) Create	<u>d</u> e) was created by Scott Simpson .			Yes	sterday at 15:05
To		Due Date:	Form Type: AMHP Report Form		Status: In Progra		
Team	Q (1)	Service Provision C	reated	oson.		Ye	sterday at 10:12
Profession Type	Q	Actual Start Date:	Service Provided: Co-ordination Team \ ! WMDC Managed Acco Home Care \ Spot		Status: Draft		
Reset Refresh A	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 🗸	🔞 Settings 🗸			Q 🛃 🛠	🕑 킻 CareDired	ctorTest
🔶 🖌 🛉 🔗 Person: Tom Mullen	Test					?
MULLENTEST.Tom. (Id: 444264) Person Record				Born: 03/05/1955 (67 Years)	Gender: Male NHS No	: V
Pronouns: Preferred Name:					I 🖓 🛞	2
Timeline Summary Profile	Cases Services	Document View All Ac	tivities			
🕇 🕼 🛷 🎝 📌 🗄 Cases						
Related Records ~		Search for re	ecords		Q	3
<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**.

人 Caredirector 🎧 Home 🖨 Workplace 🗸	👸 Settings 🗸			0 I	CareDirectorTest
🔶 🖋 🦸 🤗 Person: TEST Tom					(?)
TOM,TEST (Id: 444267) Person Record			Born: 21/0	06/2022 (14 Weeks, 6 Days) Ge	nder: Male NHS No: ∨
Pronouns: Preferred Name:	1				I
Menu V Timeline Summary Profile	Cases Services	Document View All Ac	tivities		
+ 🕮 🛷 🎝 📌 : Cases					
Related Records		Search for re	cords		Q 3
Responsible Team Responsible User	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 se
Menu V Timeline Details		
Assignment Information		2
Case Status*		
Assign To Team	×Q	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 🗸	🔍 🛃 🛠 🕲 🧔 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:	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	
Q	
Responsible User	
Q	
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
← 🖬 🖬 🎝 🎝 ፡ 🤇			?
MULLENTEST.Tom (ld: 444264) Y	Case Statuses Enter your search criteria	а.	3/05/1955 (67 Years) Gender: Male NHS No: 📏
Pronouns: Preferred Name:	Look Social Care Case Status Lookup V	iew 🗸	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details	Search Search for records	Q 3	
Case Status*		Code Gov 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*	Page 1	1 - 13	
CareDirectorTest			
Review Date	ок	Close	
	(iii)		
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
← 🖬 🗟 & I ← i Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019]	(?)
MULLENTEST.Tom (ld: 444264) V Person Record	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I 🕾 🛃 🖉
Menu V Timeline Details	
Assignment Information	
Case Status*	
Assign To Team X Q	
Q	
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		×Q
🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🔞 Settin	ngs 🗸	९ द्वि 🛠 🕲 🌷 CareDirectorTest
← B R A L : Case: MullenTest,	Tom - (03/05/1955) [CAS-000001-0019]	0
MULLENTEST.Tom (ld: 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 V	
Assignment Information	Search for records Q Q	
Case Status*	Name 14 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	
CareDirectorTest	Closed & Logged As Enquiry	
Review Date	H ≪ Page1 ► 2 1-19	
Last Assigned to Team Date	OK 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 Tem Nat S 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	

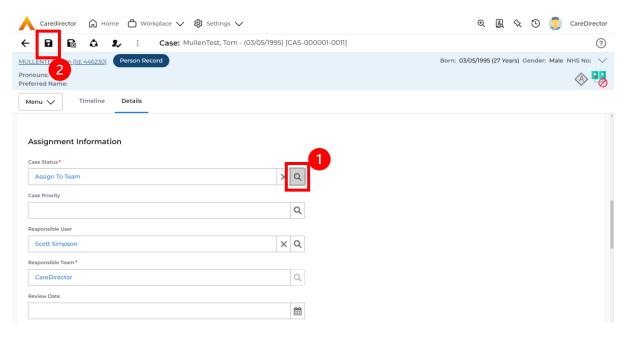
6. When a **Responsible User** has been chosen, select **Save** from the toolbar. This will send the **Case** to their **Dashboard** and **System Views**.

Caredirector 🟠 Home 📥 Workplace 🗸 🕸 Settings 🗸	🔍 🛃 🛠 🕑 킻 CareDirectorTest
← 🖪 📓 🌣 L : Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019]	(?)
MULLENTE 1 1: 444264) V Person Record	Born: 03/05/1955 (67 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I 🕾 🕾 😒
Menu V Timeline Details	
Assignment Information Case Status* Allocated Case Priority Q	
Responsible User*	
Scott Simpson X Q	
Responsible Team *	
CareDirectorTest	
Review Date	
m	



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 🗸	û Settings ∨		0 <u>R</u>	\Diamond	ۍ (CareDirector
🔶 🖬 🗟 🕹 🎝 i Case: M	ullenTest, Tom - (03/05/1995) [CAS-000001-0011]					?
MULLENTEST,Tom (ld: 446230) Person Record Pronouns:	Assign	Born: 03/05	5/1995 (27 Ye	ars) Ge	ender: M	ale NHS No: 🗸
Preferred Name: Menu Timeline Details	Responsible Team*					~~~⊘
Assignment Information	Responsible User Decision*					
Case Status* Assign To Team	Include Inactive?					
Case Priority	Related Records to Include					
Responsible User	Adult Safeguarding Adult Safeguarding Primary Reason History					
Responsible Team*	Adult Safeguarding Secondary Reason					
CareDirector	Adult Safeguarding Status History					
Review Date	Task					
Last Assigned to Team Date	OK Close					
21/10/2022						

 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 🗸		🔍 🛃 🛠 🕑 킻 CareDirector
🔶 🖬 🕼 🔕 🎝 i Case: Mulle	enTest, Tom - (03/05/1995) [CAS-000001-001	1	0
MULLENTEST.Tom (Id: 446230) Person Record Pronouns: Preferred Name: Menu V Timeline Details Assignment Information	Teams Enter your search criteria. Look My Teams in System Views Lookup View My Teams Search My Teams Reference Data Owner Teams	Born: 03/05/1995 (27 Years) Gender: Male NHS No: V	
Case Status*	Name 🖳	<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	M 🛛 Page 1 🕨	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.**

\bigwedge Caredirector \bigcirc Home \bigcirc Workplace \checkmark		🍳 🛃 🛠 边 킻 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
Pronouns: Preferred Name:	Responsible Team *	A 40
Menu V Timeline Details	Sensory Impairment Team X Q	
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	
Responsible Team*	Adult Safeguarding Secondary Reason	
CareDirector	Adult Safeguarding Status History	
Review Date	□ Note	
	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 🗸					• I 🕅 🛠	🕲 킻 CareDirectorTest
← : Case: Maisey, T	Fest - (19/11/2000) [C.	AS-000001-0080]						?
MAISEY,Test (Id: 444301) 👻 💽	eceased		•		Born: 19/11/2000 Died: 31/04	8/2022 Age at Death:	21 Years Gender: Fema	le NHS No: 523 669 8081 🗸
Pronouns: She/He								\land 🧟 💁 👼
Menu 🔨 Timeline	Details							3
Activities	1	٢	Ø	<u>e</u>		0	Ē	*
1	Actions	Adult Safeguarding	Attachments	Audit	Conferences/Meetings	Deprivations Of Liberty	Forms (Case)	Involvements
Related Items		(11)	1					
Other Information 2	nvolvements History	Joint Case Members	Status History					
5	曲							
Team			Form (Case) Created					31/08/2022 08:37:50
(Contraction)	Q		A new record of form (case) w	as 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 Upda	ated				31/08/2022 08:31:33
		Ý	Matt Davies changed End Da	te from 'Empty' to	31/08/2022'.			
			Involvement Member:		Role:		Start Date: 31/08/2022	
			Community Occupational The	rapy service	* Secondary Team		51/08/2022	
			Case Involvement Upda	ated				31/08/2022 08:31:26
inverinReset Refresh Apply		Ý	Matt Davies changed End Da	te from 'Empty' to	'31/08/2022'.			

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

Caredirector 🎧 Hol	me 💾 Workplace	Settings 🕥	\checkmark		€	Ę	\$	ъ 🄇	CareDir	ectorTe
← Case: Maisey, Test	t - (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 N	o: 523 669 80	081 🗸
Pronouns: She/Her Preferred Name:									A 🧕 🔇	2
Timeline	Details									
+ 💷 🎗 🗑	Case Involveme	ents								
Related Records 🗸 🗸				Search for records					(Q 3
Involvement Member 🗐	Role	Involvement Re	Case		Respo	onsible	Team		Start Date	L
Sensory Impairment Te	* Secondary Team		Maisey, Test	- (19/11/2000) [CAS-000001-0080]	Senso	ory Imp	airment	t 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	
Matt Davies				- (19/11/2000) [CAS-000001-0080]	Care				30/08/2022	



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

Case Involvement: New					(
Details					
General					
Case *			Responsible Team*		
Tom, TEST - (21/06/2022) [CAS-000001-0087]	×	Q	CareDirectorTest	×	Q
Person *			Involvement Priority		
TEST Tom	×	Q			۹
Involvement Member*			Involvement Status		
Peter King	×	Q			Q
Role *			End Date		
* Secondary Worker	×	Q			雦
Start Date*		_	volvement End Reason		
04/10/2022		Ê			Q
Involvement Reason			Involvement Review Date		
		Q			雦
Description					



How to clone a Case

🔥 Caredirector 🔓 Home 📥 Workplace 🗸 🕸 Settings 🗸			€	Ę	\Diamond	5	0	CareDirecto	orTest
← 🖬 🗟 & 🎝 : Case: Tom, TEST - (21/06/20	022) [C	AS-000001-0010]							?
TOM,TEST (Id: 444267) Verson Record		Born: 21/06/202	2 (20 V	Veeks,	4 Day	s) Ger	nder: M	ale NHS No:	\sim
Pronouns: Preferred Name:							Â	> 🔧 🕒	9
Menu V Timeline Details									Â
Contact Details									
Case No*		Contact Received By*							
CAS-000001-0010		Scott Simpson						Q	
Person*		Contact Reason*							
TEST Tom	Q	A - Adult Safeguarding						Q	
Case Date/Time*		Presenting Priority							
21/06/2022	0							Q	
Initial Contact		Additional Information							
	Q								
Date/Time Contact Received *									
		Referral Reason							-

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

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

Caredirector 🎧 Home 🕻	🖞 Workplace 🗸	😥 Settings 🗸		र् 🛃 🛠 🔁 🌅 CareDirecto	rTest
+ 8 6 4	: 1 ase:	īom, TEST - (21/06/20	22) [C/	AS-000001-0010]	?
<u>DM,TEST (Id: 444267)</u> Y Person	Correct Errors			Born: 21/06/2022 (20 Weeks, 4 Days) Gender: Male NHS No:	\checkmark
ronouns: referred Name:	Pin to me			I I I I I I I I I I I I I I I I I I I	9
Menu 🗸 Timeline Det	Unpin from me				
	Pin to another				
	Sync with PDS	_2			
Contact Details	Clone				
Case No*	Restrict Access	-		Contact Received By*	
CAS-000001-0010	Delete			Scott Simpson Q	
Person*	Run Workflow			Contact Reason *	
TEST Tom	Copy Record Lin	<	Q	A - Adult Safeguarding Q	
Case Date/Time*				Presenting Priority	
21/06/2022	07:00		Θ	٩	
Initial Contact				Additional Information	
			Q		
Date/Time Contact Received *					
stvoid(0);				Referral Reason	



3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone**.

Clone	Social Care Cas	e 1			
Start Date/ 12/11/20	Time for Cloned Cases*				Ø
2	Person Id	<u>Person</u> ≟↓	Date of Birth	<u>Gender</u>	Relat
	444264	Tom MullenTest	03/05/1955	Male	Broth
μ	Page 1				1-1
				Clone	Close



How to find Activities

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

am	activities My activities Team c	ases (all teams) Se	ervice provisions	Dashboards				
лу /	Active Tasks/Notes							
+	si 2, W							
)	Subject	Regarding	Priority	Event Date	Due	Created On	Created By	Modified
)	Case has been allocated	Tom, Test - (03/0			31/10/2022 10:40:	31/10/2022 10:40:	Scott Simpson	31/10/202
)	Case has been allocated	Tom, Test - (03/0			31/10/2022 10:29:11	31/10/2022 10:29:37	Scott Simpson	31/10/202
)	Case has been allocated	Test, Jayne - (06/			28/10/2022 14:58:	28/10/2022 14:58:	Scott Simpson	28/10/202
)	New Occupational Therapy Referral	Occupational Th			19/10/2022 00:00:	19/10/2022 11:39:09	Test Adults Triage User	28/10/202
)	Case has been allocated	Test, Jayne - (06/			28/10/2022 13:51:28	28/10/2022 13:51:31	Jayne Mullen	28/10/202
M	< Page 1 >							1.
A. (Active Case Notes							
+	si 2, w							
	Subject	Person	Priority	Event Date	Date	Created On	Created By	Modified

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

t Tom						(1
						Ċ.
					Born: 03/05/1996 (26 Years) Gender	r: Male NHS No: 🚿
				1		I I I I I I I I I I I I I I I I I I I
Profile	e Cases Sei	rvices Documen	t View All	Activities		
	Regarding	<u>Subject</u>	Activity	Status	Start/Due Date Actual End	Case Note
	Test Tom	Case	Task	Open	03/11/2022 14:00:	No
	Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:40:	Yes
	Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:29:11	Yes
	Test Tom	Date of Death E	Task	Open	26/10/2022 13:44:	Yes
	Test Tom \ Willia	Booking request	Task	Open	21/10/2022 15:37:26	Yes
	Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
<						
Γ.,						
		Regarding Test Tom Tom, Test - (03/0 Tom, Test - (03/0 Test Tom Test Tom Willia	Regarding Subject Test Tom Case Tom, Test - (03/0) Case has been al Tom, Test - (03/0) Case has been al Test Tom Date of Death E Test Tom \Willia Booking request	Regarding Subject Activity Test Tom Case Task Tom, Test - (03/0 Case has been al Task Tom, Test - (03/0 Case has been al Task Test Tom Date of Death E Task Test Tom \Willia Booking request Task	Regarding Subject Activity Status Test Tom Case Task Open Tom, Test - (03/0 Case has been al Task Open Tom, Test - (03/0 Case has been al Task Open Test Tom Date of Death E Task Open Test Tom Date of Death E Task Open Test Tom \Willia Booking request Task Open	Regarding Subject Activity Status Start/Due Date Actual End Test Tom Case Task Open 03/11/2022 14:00 Tom, Test - (03/0 Case has been al Task Open 31/10/2022 10:40 Tom, Test - (03/0 Case has been al Task Open 31/10/2022 10:40 Tom, Test - (03/0 Case has been al Task Open 31/10/2022 10:40 Test Tom Date of Death E Task Open 26/10/2022 13:41 Test Tom \Willia Booking request Task Open 21/10/2022 13:37:26



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 🗂 Workpl	olace 🗸 🔞 Settings 🗸				Q A U	CareDire
- 🖍 🎙 🔗 Person: Test	t Tom					(
M.Test (Id: 446229) Person Record					Born: 03/05/1996 (26 Years) Gender:	Male NHS No:
onouns: eferred Name:						À 📎
Menu 🗸 Timeline Summary	Profile Cases Se	rvices Documen	t View All Ad	tivities		
All Activities						
Keyword	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	c					
	1					
To	-					
01/11/2022						
Actual End (From)						
*						
Clear Filters				_		

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

Caredirector 🎧 Home 📥 Works	olace `	🗸 🔯 Settings 🗸				Q 🛃 🛠 🕑	CareDire
- 🖌 🥊 🔗 Person: Tes	st Tom						(
M.Test (Id: 446229) Person Record						Born: 03/05/1996 (26 Years) Gender:	Male NHS No:
ferred Name: Menu V Timeline Summary	Prof	ïle Cases Ser	vices Documen	t View All A	Activities		~
All Activities	Î O	Regarding	Subject	Activity	Status	Start/Due Date Actual End	Case Note
	0	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	0	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
Cleated Date V		Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
From 🛍	<		-				
То							
01/11/2022							
Actual End (From)							
m							



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-000001-00	87]			0
TOM,TEST (Id: 444267) Perso	on Record				Born: 21/06/202	2 (14 Weeks, 6 Days)	Gender: Male NHS No: 🗸
Pronouns: Preferred Na 1							I I I I I I I I I I I I I I I I I I I
Menu A Timeline	Details						
Activities	E Appointments	Case Notes	(©) Emails	Letters	Q Phone Calls	T asks	
Related Items							
Other Information							
Responsible User			Q				
Responsible Team *			Ч				
AMHP Coordinator			Q				

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

÷	Case: Tom, TEST - (24/07/1950)	[CAS-000001-0018]										?
OM	1 <u>,TEST (ld: 444276)</u> Y Person Record						Born: 24/07	/1950 (72	Years) Ge	nder: M	ale NHS No	: \
	nouns: ierred Name: Tom											•
м	enu V Timeline Details											
+	📲 🎝 🗑 Tasks											
R	elated Records	~			Search for records						Q	G
R	alated Records	∽ Due ₹↓	<u>Status</u>	Rega	Search for records	Reason		Responsit	ole Team		Q Responsible	
			<u>Status</u> Open			Reason		<u>Responsit</u> CareDirec				
	Subject	<u>Due</u> ≓↓		Tom,	arding	<u>Reason</u>			torTest			
	Subject CHC Funding Decision - Fully funded	<u>Due</u> ₹↓ 24/06/2022 08:48:05	Open	Tom, Tom,	arding , TEST - (24/07/1950	<u>Reason</u>		CareDirec	torTest torTest			

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 🗸				Ð		\Diamond	Ŀ	, 🦲	CareD	irectorTest
🔶 🖬 🗟 🗸 🗙 Case Note (For Case): New										?
TOM,TEST (Id: 444267) Person Record			Born: 21/06/2022	(14 V	Veeks	, 6 Day	ys) G	ender:	Male NH	S No: 🗸
Pronouns: Preferred Name:										\land 🍓
Details										
Details										
Case *			Responsible Team *							
Tom, TEST - (21/06/2022) [CAS-000001-0087]	хq	.]_	CareDirectorTest						×	a 1
Reason			Responsible User							
	Q	.]	Scott Simpson						×	Q
Priority			Category							
	Q									Q
Date*			Sub-Category							
**	0									Q
Status*			Outcome							
Open	~									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.

- 🖬 🗟 🖍 📮 : Form (Case): Adu	ult - Change to	Service Request for Mulle	nTest, Tom - (03/05/195	5) [CAS-0000	001-000
JLLENTEST 2 Jd: 444264) V Person Record			Born: 03/05/1955 (67 Ye	ars) Gender: I	Male NHS No:
pnouns: eferred Name:				Ŕ	> !!
Menu V Details					
Case*		Responsible Team *			
MullenTest, Tom - (03/05/1955) [CAS-000001-0002]	Q	CareDirectorTest			Q
Form Type*		Responsible User			
Adult - Change to Service Request	1	Scott Simpson			XQ
Status*		Due Date			
Complete	~	23/06/2022			曲
Not Started		Review Date			
In Progress Complete					m
Closed Cancelled		L			
Approved					
	ď				

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	nce 🗸 🔞 Settings 🗸	Θ	ł	\$ 3) 🥘	CareDirector
· 🎗 🗗 🤤 🕴	Task: Test Task for Case					(
ILLENTEST.Tom (Id: 444264) YACtivat	te	Born: 03/0	5/1955 (6	7 Years) C	Gender: M	ale NHS No:
onouns: Delete	2				A	-
Menu V Details	/orkflow					
	Record Link					
General						
General Subject*						
Subject* Test Task for Case						
Subject* Test Task for Case Description	生 生 [22] 主 三 三 四 声 田 三	· © Ω =				

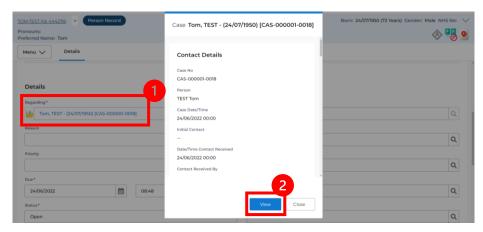


How to tell if an Activity is linked to a Case or Person Record

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 🗸	🔍 🛃 🛠 🗿 🌅 CareDirectorTest
🔶 🖬 🕼 👶 🎝 : Task: CHC Funding Decision - Fully funded	0
TOM,TEST (Id: 444276) Verson Record	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 Details	
Details	
Regarding*	Responsible Team *
Tom, TEST - (24/07/1950) [CAS-000001-0018]	CareDirectorTest Q
Reason	Responsible User
٩	Q
Priority	Category
٩	Q
Due*	Sub-Category
24/06/2022	Q
Status*	Outcome
Open v	Q
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.

🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸			० द्व 🛇 😳 🌅	CareDirector
← 🖬 🗟 ✓ X Task: New				?
MULLENTEST.Tom (Id: 446230) Person Record			Born: 03/05/1995 (27 Years) Gender: Male	NHS No: 🗸
Pronouns: Preferred Name:				la 🖏
Details				
Regarding*			Responsible Team *	1
MullenTest, Tom - (03/05/1995).[CAS-000001-001]	X	Q	CareDirector	
Mullemest, 1011 - (03/03/1553) (CAS-000001-0011)	^	Q	CareDirector	~ ~
Reason			Responsible User	
		Q	Scott Simpson	XQ
Priority			Category	
		Q		Q
Due*			Sub-Category	
		Θ		Q
Status*			Outcome	
Open		~		Q

 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 🗸 🤤	s settings 🗸		Q B & O 🤇	CareDirect
- 🖬 🗟 🗸 X Task: New				C
JLLENTEST.Tom (Id: 446230) Person Record onouns: eferred Name:	Teams Enter your search criteria.	1	Born: 03/05/1995 (27 Years) Gender: Ma	ile NHS No:
Details Regarding* [A] MultilenTest_Torm - (03/05/1995) (CAS-000001-0001)	Look in System Views Lookup View Search My Teams Reference Data Owner Team	v s		
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	<u>Name</u> ≟↓	Business Unit		XQ
Reason	Adults Connecting Care Team West	Adult Services		× O
	AMHP rota	Adult Services		XQ
Priority	CareDirector 2	CareDirector		
	Sensory Impairment Team	Adult Services		Q
Due*				Q
Status*				
Open	Page 1	3 1-4		Q
Contains Information Provided By A Third Party?				
O Yes		Close		
No				



 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 🗸	Q 🎚 🛠 🛈 🏮 CareDirector
🗲 📴 💀 🖌 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*
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	Sensory Impairment Team
Reason	Responsible User
٩	Scott Simpson X Q
Priority	Category
٩	Q
Due*	Sub-Category
	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?
○ Yes	○ Yes
No	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 🗸	Q 🛃 🛠 🕑 🌅 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* Image:	Responsible Team* Sensory Impairment Team Q Responsible User Q
Priority	Category
٩	Q
Due*	Sub-Category
28/10/2022	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?
\sim	<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 🗸 🗄	🕄 Settings 🗸	🔍 🛃 🛠 🕑 🌅 CareDirector
🔶 🖬 🔞 🔕 🎝 i Task: Test	t	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*	
Regarding*	Responsible User Decision*	
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	~	٩
Reason		
		٩
Priority		
		٩
Due*		
28/10/2022		٩
Status*		
Open		٩
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.

🔶 Caredirector 🎧 Home 🗂 Workplace 🗸	₿ Settings ∨	🔍 🛃 🏡 讫 🌅 CareDirector
🔶 🖬 🗟 👶 🎝 i Task: Tes	st	0
MULLENTEST.Tom.(ld: 446230) Person Record Pronouns: Preferred Name:	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Menu V Details	Adults Connecting Care Team West X Q	
Regarding* MullenTest, Tom - (03/05/1995) [CAS-000001-001]	Responsible User Decision* Do not change	٩
Reason	1	Q
Priority		۹
Due* 28/10/2022		٩
Status* Open	2	٩
Contains Information Provided By A Third Party?	OK Close	

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



How to Clone Activities

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

	ۍ	CareDirec	orTest
			?
Veeks, 4 Day	ys) Gender	: Male NHS No	: ~
		🚸 🔧 🤅	9
			_
	e 26		

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

Clone Activity to*			Retain Status?*		1
Adult Safeguarding		~	No		~
Person Id	Name			Relationship	<u>Primary Rea</u>
444267	TEST Tom				Adults Safec
R Page 1					1-1
				3	



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 🞧 Hon	ne 🗂 Workplace 🗸 🕅	Settings 🗸		t 🕄 🛠	🕑 🧻 CareDirectorTe
< ∥ ¶ ∂	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	ctivities	3
Activities 2		9	B	B I	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
	Ē	20	2	<u>a</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 **Create New Record** from the toolbar.

Caredirector 🎧 Home 🗂 Worl	kplace 🗸 👸 Settings	\checkmark			⊕ ₽	\Diamond	5		CareDirectorTest
🔶 🖋 🦸 🔗 Person: T	EST Tom								?
TOM,TEST (ld: 444267) Person Record				Born: 21/06/2022	(15 Weeks,	0 Day)	Gend	er: Mal	e NHS No: 🗸
Pronouns: Preferred Name:									la 🕹 🛞
M 1 Timeline Summary	Profile Cases	Services	Document View	All Activities					
🕂 💷 🕮 🗑 Attachme	nts (For Person)								
Related Records 🗸			Search for record	ds					Q G
Title	Document Type	Document	Sub Type	Date	Crea	ted By			Created On
		NO REC							
		No results w for this s							



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

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🍪 Settings 🗸	0् ह्यु 🗞 🕚 🌅 CareDirectorTest
🔶 🖬 📓 Attachment (For Person): New	0
TOM/TEST (Id: 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 X Q	CareDirectorTest X Q
Title *	File*
Test Document Upload	
Date*	Choose file Browse
04/10/2022 🛍 09:00 🛇	
Document Type*	Declared O Yes
Clients X Q	No
Document Sub Type*	
٩	
Cloning Information	
Is Cloned?	Cloned From
○ Yes	Q.
® No	

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

C Open								×
← → • ↑ <mark> </mark>	> This PC	> Documents > CareDirector V6 >	ME Training		ٽ ~	🔎 Search ME Tr	aining	
Organise 🔻 New	v fold						•	?
OneDrive	^	anic	Date modified	турс	Size			
OneDrive	×	Training Superuser Booking Sheet	09/03/2022 10:27	Microsoft Excel C	1 KB			
This PC								
3D Objects								
E Desktop								
🔮 Documents								
🕹 Downloads								
Music								
Pictures								
Videos								
🎬 Windows (C:)								
🛖 Datastore (G:)								
👳 scottsimpson l	Us							
A Makanala	~							
1	File name:	Training Superuser Booking Sheet			~	All files 2		\sim
						Open	Cancel	

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

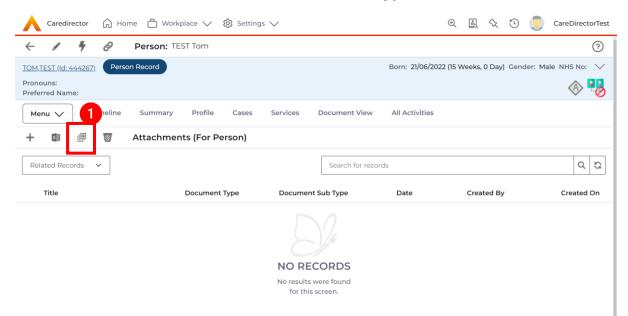


How to upload multiple attachments

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	ne 🗂 Workplace 🗸 ध्	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		9	1 0	B .	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
	<u>a</u>	20	2		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 🞧 Home 🗂 Wo	orkplace 🗸 🔞 Settings 🗸		Q 🛃 🛠 Ū	CareDirectorTest
🔶 🖍 🖣 🔗 Person:	TEST Tom			0
TOM.TEST (Mr) (Id: 444276) V Person R	ecord		Born: 24/07/1950 (72 Years) Ge	nder: Male NHS No: ∨
Pronouns: Preferred Name: Tom				🚸 👱 🔧
Menu 🗸 Timeline Summary	Profile Cases Services Docume	ent View All Activities		
🕂 💷 🕮 👿 Attachme				
Related Records 🗸	Upload Multiple Files	1		Q 3
Title	Document Type *	Responsible Team •	Created On M	1odified By
		Q CareDirectorTest X Q		
	Document Sub Type*	a		
		2		
	Files			
	Browse for Files			
	BIOWSE TO FILES			
		+		
		Start Upload 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 🗂	Workplace \checkmark 🔞 Settings \checkmark	ତ୍ हु 🛠 🕑 킻 CareDirectorTest
- 🖌 🖣 🔗 Perso	TEST Tom	0
TOM.TEST (Mr) (Id: 444276) Verse	kon Record	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 🗸 Timeline Sumr	mary Profile Cases Services Document View All Activities	
🕂 💷 🕮 👿 Attack	hments (For	_
Related Records v	Upload Multiple Files	[a] p]
Title	Docum	Created On Modified By M
	Files Browse for Files. Drop files here to attach them	Close



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 🗸	영 Settings 🗸				Q 🛃 🛇	CareDirectorTest
← : Case: Tom, TEST - (21/06/2022) [CAS	5-000001-0087]					0
TOM TEST (Id: 444267) Person Record				Born: 21/06/2022	2 (14 Weeks, 6 Days)	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 Details				3		
Activities 2	۲	0		E	¥	
Actions	Adult Safeguarding	Attachments Au	udit Deprivations Of Liberty	Forms (Case)	Involvements	Involvements History
Related Items	10					
Other Information Joint Case Members	Status History					
*	4	Form (Case) Created				21/09/2022 13:04:25
Team	(A new record of form (case) was create	d h. C. M Classes			
٩	Ť	A new record or form (case) was create	ed by scott simpson.			
Profession Type		Due Date:	Form Type: AMHP Report Form		atus: Progress	
Q						
		Case Involvement Updated				21/09/2022 12:23:12
	Y	Scott Simpson changed End Date from	m 'Empty' to '21/09/2022'.			
		Involvement Member:	Role:		art Date:	
		Community Occupational Therapy Ser	rvice Occupational Therapist	21,	/09/2022	
		Case Involvement Created				21/09/2022 12:17:20
		A new record of case involvement was	s created by Scott Simpson.			
Reset Refresh Apply		Involvement Member:	Role:	Sti	art Date:	

2. Select the relevant for Form to open.

Caredirector	🎧 Home 📋 Workplace 🗸 🐯 Settings 🗸					• ii 🛠	5	CareD	DirectorTest
← Case: Tom,	TEST - (21/06/2022) [CAS-000001-0087]								?
TOM.TEST (Id: 444267)	Person Record				Born: 21/06	5/2022 (14 Weeks, 6 Days	s) Gende	er: Male NHS	No: 🗸
Pronouns: Preferred Name:								<	8 🔧 🛛
Menu 🗸 🛛 Tim	neline Details								
+ 🕮 🗶	🗑 Forms (Case)								
Related Records 🗸				Search for records					QG
□ <u>Due Date</u> ₹↓	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	2	Completion D	ate <u>Sign</u> e
□ <u>Due Date</u> F↓	Form Type AMHP Report Form	Start Date 21/09/2022	<u>Status</u> In Progress	Responsible User Scott Simpson	Responsible Team CareDirectorTest	Completed By	2	Completion D	ate <u>Sign</u> i
						Completed By	2	Completion D	<u>ate Sign</u>
						Completed By	2	<u>Completion D</u>	<u>ate Sign</u>
						Completed By	2	Completion D	ate Signe
						<u>Completed By</u>	2	Completion D	ate <u>Sign</u> e
						<u>Completed By</u>	2	Completion D	ate 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 🗸	영 Settings 🗸			Q & & C)	Test
🔶 🖋 🦸 🤗 Person: TEST Tom						0
IOM,TEST.(Id: 444267) Pronouns: Preferred Name:	1		Born: 21/0	06/2022 (14 Weeks, 6 Days) G	ender: Male NHS No:	
Menu ∨ Timeline Summary Profile + Image: Ima	Cases Services	Document View All Ac	tivities			
Related Records		Search for re	cords		Q	G
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. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form** (Case).

Caredirector 🞧 Hom	ne 🗂 Workplace	> 袋 Set	tings 🗸				⊕ 🛃 🛠	5	CareDirectorTest
← : Case: Tom, T	EST - (21/06/2022)	[CAS-00000]	1-0087]						0
TOM,TEST (Id: 444267) Person	n Record					Born: 21/06/2	2022 (15 Weeks, 0 Da	ay) Gend	er: 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	16	٩		Ø	Ē,	9	Ē		*
Related Items	Actions	Adult Safeg	uarding	Attachments	Audit	Deprivations Of Liberty	Forms (Case)		Involvements
	2	iiii							
Other Information	nvolvements History	Joint Case M	1embers	Status History					
	**	T							
Team				<u>ase) Created</u>					21/09/2022 13:04:25
	Q ($\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	A new rec	ord of form (case) was cr	eated by Scott Sim	pson.			
Profession Type			Due Date:		Form Type: AMHP Res		Status: In Progress		
	Q								
			Case Inv	olvement Updated	<u>I</u>				21/09/2022 12:23:12
		Ŷ	Scott Sim	oson changed End Date	from 'Empty' to '21/	09/2022'.			
			Involvemen	t Member: ty Occupational Therapy	Role:	onal Therapist	Start Date: 21/09/2022		
Reset Refresh Ap	ply		Service	y occupational melapy	Occupatio		21/05/2022		



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

🤆 Case	2: Tom, TEST - (21/06/2022) [CAS-000001-	0087]				(?
<u>DM,TEST (Id: 44</u>	44267) Person Record			Born: 21/06/2	022 (15 Weeks, 0 Day) Gend	er: Male NHS No: 🚿
ronouns: referred Name	21					I 🔿 🛂
M1 + ⊠	Timeline Details					
Related Recor	rds 🗸		Search for record	5		0 5
Due Date	F↓ 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 Arme B Workplace ∨ 竣 Settings ∨				Ð	ł	\Diamond	5		CareDir	ectorTest
Form (Case): New										?
TOM,TEST (Id: 444276) V Person Record				Born: 24/07/	1950 (7	72 Years) Ger	nder: M	tale NHS	No: 🗸
Pronouns: Preferred Name: Tom										0
Details										
General										
Case*			Responsible Team *							
Tom, TEST - (24/07/1950) [CAS-000001-0018]	× C	٤	CareDirectorTest						×	Q
Form Type *			1 ponsible User							
	0	٤								Q
Status*		_	Due Date							
In Progress	~									#
Start Date *			Review Date							_
21/10/2022	Ê	1								
Preceding Form										
	0	٤								
* datain * == * == * == *										



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	${}^{igodoldsymbol{ iny boundary constraints}}$ Workplace \checkmark Settings \checkmark	🔍 🛃 🛠 🔁 🌅 CareDirectorTest
← 🖬 💀 🖷 🗟	: AMHP Report Form	
TOM,TEST (Id: 444267) Person R	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	○ Yes ○ No	
	Ethnic Origin	
< c	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 🗸		€	<u>B</u>	\Diamond	3		CareDire	ctorTest
← 🖬 🗟 🖍 🛱	: Crm (Case): Adult - Change to Servi	ice Req	uest for Tom, TEST - (24/07/1950) [CAS-000001-0018	3] Sta	rting 2	20/10/	2022 cr	eate	?
TOM,TEST (ld: 444276) Y Person	Print History		Born: 24/07/1	950 (7	2 Years	Gen	der: Mal	le NHS N	No: 🗸
Pronouns: Preferred Name: Tom	Share						4	A 🖣	2
Menu 🗸 Details	Assign 3								
	Clone								
	Sync with PDS								
General	Restrict Access								
Case*	Delete		Responsible Team *						
Tom, TEST - (24/07/1950) [CAS-00	Run Workflow	Q	CareDirectorTest						Q
Form Type*	Copy Record Link		Responsible User						
Adult - Change to Service Reque	st	Q	Scott Simpson					\times	Q
Status*			Due Date						
In Progress		~	27/10/2022					(*
Start Date*			Review Date						
20/10/2022		Ê						1	#
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	lo: 🗸
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 ∨			\odot	🛃 🛠 🕚 🌅 CareDirector
- : Case: Tom, TEST - (21/06/2022) [C	CAS-000001-0087]				Ċ
M <u>TEST (Id: 444267)</u> Person Record onouns: ferered Nan				Born: 21/06/2022 (14 We	eks, 6 Days) Gender: Male NHS No: 🔌
Adenu	۲	Ø 🗐		3	r %
Related Items	Adult Safeguarding	Attachments Audit	Deprivations Of Liberty	Forms (Case) Involve	ements Involvements History
feam Q		Form (Case) Created A new record of form (case) was created by :	Scott Simpson.		21/09/2022 13:04:25
rofession Type	3	Due Date:	Form Type: AMHP Report Form	Status: In Progres	15
	()	Case Involvement Updated Scott Simpson changed End Date from 'Em	pty' to '21/09/2022'.		21/09/2022 12:23:12
		Involvement Member: Community Occupational Therapy Service	Role: Occupational Therapist	Start Date: 21/09/2022	2
	1	Case Involvement Created	ed by Scott Simpson.		21/09/2022 12:17:20
eset Refresh Apply		Involvement Member:	Role:	Start Date:	

2. Select the relevant for Form to open.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🛞 Settings 🗸					• E &	🕒 🏮 CareDirectorT
Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]						(?
OM,TEST.(Id: 444267) Person Record				Born: 21/	/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🚿
ronouns: referred Name:						I 🔿 🛂
Menu V Timeline Details						
+ 🛍 🎝 🗑 Forms (Case)						
Related Records 🗸 🖌			Search for records			Q 5
Due Date 🖓 Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date S
AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		



Caredirector 🞧 Home	□ Ce ∨ ĝi Settings ∨			€	R 4	٣	CareDirectorTest
- 🖬 🗟 🖍 🖨	Form (Case): AMHP Report Form for Tom, TEST - (2	21/06/20	22) [CAS-000001-0087] Starting 21/09/2022 created by Scott S	impsc	'n		0
TOM,TEST (Id: 444267) Person Reco	Print History		Born: 21/06/2022	(14 We	eks, 6 Da	iys) Geno	der: Male NHS No: 🗸
Pronouns: Preferred Name:	Share 2						A 🔧
Menu 🗸 Details	Clone						
General	Restrict Access						
Case*	Delete		Responsible Team •				
Tom, TEST - (21/06/2022) [CAS-00		Q	CareDirectorTest				Q
Form Type*	Copy Record Link		Responsible User				
AMHP Report Form		Q	Scott Simpson				XQ
Status*			Due Date				
In Progress		~					#
Start Date*			Review Date				
21/09/2022		雦					m
Preceding Form							
		Q					
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 🗟 🖍 🗭	: Form (Cas	se): AMHP Re	eport Form for Tom, TI	EST - (21/06/2022) [CAS	-000001-0087] S	tarting 21/09/2022 create	ed by Scott Simpson		
TEST (Id: 444267) Person Recor	rd					Во	rn: 21/06/2022 (14 Weeks,	6 Days) Gender:	Male NHS No:
ouns: erred Name:									
enu 🗸 Details									
	Clone Form ((Case)							
ieneral							-		
	Start Date of Form		6						
ase * Tom, TEST - (21/06/2022) [CAS-00	03/10/2022								
	Person		Case	Case Start Date	Case Status	Responsible Team	Responsible		
orm Type*	TEST To	m (Primary)	CAS-000001-0010	21/06/2022 07:00	Assign To Team	CareDirector Support			
AMHP Report Form	TEST To	m (Primary)	CAS-000001-0087	20/09/2022 09:2	Assign To Team	AMHP Coordinator			XQ
tatus*	·								
In Progress	IN N PA	Jei P					1 - 2		#
tart Date*									
21/09/2022									m
receding Form									
->									
						_	_		
						Clor	Cancel		
dditional Information	_	_							
eparate Assessment				Combin	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.

Pronouns:	人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕲 Settings 🗸		Q 🛃 🛠 🛈 🌅 CD V	6 Team
Procouns: Preferred Name: Menu Details Ceneral Case* Responsible Team* Completion Details Responsible Vear Sort Simpson Preceding Form Preceding Form Completion Details Completion Details Server Simpson Q Details Completion Details Signed Off Deta* Signed Off Date* Signed Off Da	🔶 👁 📮 🐻 : Form (Case): Adult Care and Sup	port Pla	an for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022	?
Preferred Name:	TOM_TEST (Id: 444267)		Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS N	o: 🗸
Ceneral Case* Tom, TEST - (21/06/2022) [CAS-000001-0087] Prom Type* CareDirectorTest Adult Care and Support Plan Status* Closed Status* Closed V1/1/2022 Preceding Form Preceding Form Completion Details Completed By* Completion Details Status* Completed fly* Signed Off Date*	Pronouns: Preferred Name:		I I I I I I I I I I I I I I I I I I I	2
Case* Responsible Team* Tom, TEST - (2//06/2022) [CAS-00000-0067] Q Form Type* Responsible User Adult Care and Support Plan Q Status* Due Date Closed 1/1/1/2022 Status* Review Date 09/1/2022 Preceding Form Preceding Form Q	Menu V Details			
Tom, TEST - (21/06/2022) [CAS-000001-0087] Q Form Type* Responsible User Adult Care and Support Plan Q Scatus* Due Date Closed 1/11/2022 Start Date* Review Date 09/11/2022 IIII Preceding Form IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	General			
Form Type* Responsible User Adult Care and Support Plan Soctt Simpson Status* Due Date Closed 1/11/2022 Start Date* Review Date 09/11/2022 Image: Completion Details Completed By* Completed By* Completed Sy* Soctt Simpson Q Signed Off By* Signed Off Date* Signed Off Date* Signed Off Date* Signed Off Date* Signed Signed Signed Signed Signed Signed Signed Signed Signed SignedS	Case*		Responsible Team*	_
Adult Care and Support Plan Status* Closed Closed V Start Date* Og/11/2022 Preceding Form Image: Completion Details Completed By* Scott Simpson Signed Off By* Signed Off By*	Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	Q
Status* Due Date Closed I/1/1/2022 Status* Review Date 09/11/2022 Image: Completion Details Completed By* Completion Date* Scott Simpson Image: Completion Date* Signed Off By* Signed Off Date*	Form Type*		Responsible User	
Closed In/In/2022 Start Date* Review Date 09/In/2022 Imit Preceding Form Imit Imit Imit Imit Imit Completion Details Completion Date* Scott Simpson Imit Signed Off By* Signed Off Date*	Adult Care and Support Plan	Q	Scott Simpson	Q
Start Date* Start Date* Preceding Form Completion Details Completed By* Completed By* Soctt Simpson Q Signed Off By• Signed Off Date* Signed Off Date* Signed Off Date* Signed Off Date* Signed Off Date* Signed Off Date* Signed Off Date* S	Status*		Due Date	
09/11/2022 Preceding Form Image: Completion Details Completed By* Completed By* Scott Simpson Image: Signed Off By* Signed Off Date* Image: Signed Off Date*	Closed	~	11/11/2022	##
Preceding Form Preceding Form Image: Completion Details Completed By* Completion Date* Scott Simpson Q Signed Off By* Signed Off Date*	Start Date*		Review Date	
Completion Details Completed By* Completion Date* Scott Simpson Signed Off By* Signed Off Date*	09/11/2022	#		##
Completion Details Completed By* Completion Date* Scott Simpson Q Signed Off By* Signed Off Date*	Preceding Form			
Completed By* Completion Date* Scott Simpson Q Signed Off By* Signed Off Date*		Q		
Completed By* Completion Date* Scott Simpson Q Signed Off By* Signed Off Date*				
Completed By* Completion Date* Scott Simpson Q Signed Off By* Signed Off Date*	Completion Details			
Scott Simpson Q 09/11/2022 Imit Signed Off By* Signed Off Date* Imit	Completion Details			
Signed Off By* Signed Off Date*	Completed By*			
	Scott Simpson	Q	09/11/2022	
Scott Simpson Q 09/11/2022	Signed Off By*		Signed Off Date*	
	Scott Simpson	Q	09/11/2022	##



CAREDIRECTOR HOSPITAL SOCIAL WORK TEAM

How to reactivate a Closed Form

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

\rm Caredirector 🎧 Home 📥 Workplace 🗸 🕸 Settin	igs 🗸	🔍 🖳 🛠 🛈 🌅 CareDirectorTest
🔶 👁 🖨 🔂 : Form (Case): Occupatio	nal Therapy Co	nversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St
TOM,TEST (Id: 444267) Y Person Record		Born: 21/06/2022 (20 Weeks, 4 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 🗸 Details		
General		
Case*		Responsible Team *
Tom, TEST - (21/06/2022) [CAS-000001-0010]	Q	CareDirectorTest
Form Type*		Responsible User
Occupational Therapy Conversation Record	Q	Scott Simpson Q
Status*		Due Date
Closed	~	20/12/2022
Start Date*		Review Date
10/11/2022		
Preceding Form		
		•

2. Select the Three Dots and select Activate.

Caredirector 🞧 Ho	ome 💾 Workplace 🔨	🗸 🔯 Settings 🗸			€	Ę	\Diamond	€		CareDirec	torTest
← ● 🖬 🗟	: Urm (Case	e): Occupational Ther	ару Со	nversation Record for Tom, TEST	(21/0	6/2022	2) [CA	S-000	001-00	010] St	?
TOM,TEST (Id: 444267)	Share			Born: 21/06/202	2 (20	Weeks,	4 Day	s) Ger	ider: M	ale NHS N	o: 🗸
Pronouns: Preferred Name:	Assign								À	- 🔧 🤇	9
Menu 🗸 Details	Clone										
	Restrict Access										2
	Activate										
General	Delete										
Case *	Run Workflow			Responsible Team*							
Tom, TEST - (21/06/2022) [Copy Record Link		Q	CareDirectorTest						C	2
Form Type *				Responsible User							
Occupational Therapy Co	nversation Record		Q	Scott Simpson						C	λ
Status*				Due Date							
Closed			~	20/12/2022						Ê	1
Start Date*				Review Date							
10/11/2022										Ê	1
Preceding Form											



Status:

In Progress

21/09/2022 12:23:12

CareDirectorTest

(?)

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• A

How to input Service Provisions

Where to find Service Provisions

Q

- 1. Every Service Provision in the Service Provision booklet will require these steps beforehand.
- ጰ Settings 🗸 0 R & D Caredirector 🞧 Home 🗂 Workplace 🗸 4 0 Person: TEST Tom 4 1 Born: 21/06/2022 (13 Weeks, 3 Days) Gender: Male NHS No: TOM,TEST (Id: 444267) Person Record Pronouns: Preferred Name: Profile Document View All Activities Timeline Summary Cases Services Menu 🗸 Filter By SEP 2022 \sim 21/09/2022 13:42:01 **Task Created** From A new record of task was created by Scott Simpson. Ê Responsible Team: Responsible User: Subject: То CareDirectorTest Scott Simpson Referral has been Allocated 21/09/2022 13:04:25 Form (Case) Created Team A new record of form (case) was created by Scott Simpson. Q
- Select the relevant Person Record and select Services.

Due Date:

6

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.

Scott Simpson changed End Date from 'Empty' to '21/09/2022

Case Involvement Updated

Form Type:

AMHP Report Form

Caredire	ector 🎧 Home	🗂 Workplace 🗸	(බූ Setting	5 🗸			÷	PO	\$ (D 🦲	CareDirectorTest
\leftarrow /	🎙 🔗 Pe	erson: TEST Tom									?
TOM,TEST (Id: 44	44267) Person Re	cord				Born: 21/06	/2022 (13 V	Veeks, 3	Days) G	ender: M	ale NHS No: 🗸
Pronouns: Preferred Name	e:			1							Image: A start and a start
2 Menu 🗸	Timeline S	ummary Profile	Cases	Services	Document View	All Activit	ies				
+ 🖾	<i>€∂</i> 2, ≰	Service	Provisions								
Related Reco	rds		~		Search for record	ds					Q 3
□ <u>Id</u> <u></u>]	Person	Id [Person] Sta	atus	Planned Star	rt D Planned I	End Da A	ctual Start	Date	<u>Actual</u>	End Date	Service Eleme
220022	TEST Tom	444267 Dr	aft	08/08/2022							Adult Residen

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

Profession Type

Reset Refresh



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 🗸		🔍 द्वि 🛠 🛈 🌅 CareDirectorTest
🔶 🖬 🗟 🕹 🎝 : Service Prov	vision: Tom Jones \ 220015 \ 24 Jun 2022		0
TOM.TEST. (Mr). (Id: 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 I I I I I I I I I I I I I I I I I I
Menu V Timeline Details Costs Per Wee	Look Lookup Records	~	
General	Search for records	Q 3	
Person*	Name	<u>Code</u> ≧↓ <u>Gov C</u>	
TEST Tom	Draft	1	٩
ld*	Booking Request	20	
220015	Validation Required	30	Q
	Waiting List	40 2	
Status*	Rejected	50	
Draft	Ready for Authorisation	60	
Service Request Service Element 1* Adult Residential Care	Page1	3 ¹⁻⁶ Close	×q
Special Scheme	Finance Clier	nt 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 Person Record Born: 24/07/198 Born: 24/07/198 Born: 24/07/198 Born: 24/07/198 Born: 24/07/198 Born: 24/07/198 Born: 24/06/202 Belanced Start D Planned End Da Actual Start Date Actual End Date Cancel Update CL Code Bulk Edit Born: 24/06/2022 Born: Cancel Update CL Code Bulk Edit Born: 24/06/2022 Born: Cancel Update CL Code Bulk Edit Born: 24/06/2022 Born: Cancel Born: Cance	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 Planned Start D Planned End Da Actual Start Date Service Element n Calculate Cost Per Week 24/06/2022 Adult Resident n Cancel Yugate CL Code SDS - WMDC M Ulpdate CL Code Bulk Edit Vertice Logical SDS - WMDC M	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



CAREDIRECTOR HOSPITAL SOCIAL WORK TEAM

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	ကြဲ Home ငြီ	Workplace 🗸 🔞 Sett	ings 🗸			Q 🛃 🛠	ۍ ک	CareDirectorTe	est
← : Ser	vice Provision:	: Tom MullenTest \ A J Sc	ocial \ SDS - M	anaged Account \ He	ome Care \ Spot \ 2	220110 \ 08 Nov 2	2022	(1	Ð
MULLENTEST.Tom (Id:	444264) -	Person Record			Born:	03/05/1955 (67 Yea	ars) Gender: M	ale NHS No: 🚿	~
Pronouns: Preferred Name:			1				$\langle A \rangle$	🛂 🐴 🦉	
Me 2	imeline Deta	ils Service Deliveries	Service Deli	very Variations Co	sts Per Week Fi	nance Transactior	าร		
+ 💵 🎗	Servic	ce Deliveries							
Related Records	~			Search for re-	cords			٩ 5	ž
Person	Id	Planned Start Ti	Units	Total Units	Total Visits	Monday	Tuesda	ay V	Vedr
			NO	RECORDS					
				esults were found					
			fc	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 HOSPITAL SOCIAL WORK TEAM

人 Caredirector 🛛 🔓 Home 🗂 Workplace 🗸 🐯 Settings 🗸	0 🖳 🛠 🗿 🌅 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:	In the second se
Menu Variations	
General	
Service Provision*	Responsible Team*
TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 22008 Q	CareDirectorTest Q
Id*	Rate Unit *
188114	Per 1 Hours (Whole) \ Hours (Part)
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*
Yes	Yes
○ No	○ No
Wednesday*	Sunday*
Yes	Yes
○ No	○ 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

	st - 205632 \ ISF Provider \ ISF \ \ \ Spot \ 225727 \ 21 Oct 2022	
B 🗟 & L 🗄 Service Provision: Tom Test \ Carers Tru	st - 205632 (TSF Provider (TSF ((Spot (225727 (21 Oct 2022	3
Tom (Id: 446228) Person Record	Born: 03/05/1995 (27 Years) Gender: Male	NHS No:
ouns: rred Name: 1		
nu V Timeline Details Costs Per Week Finance Transactions		
eneral		
rson*	Responsible Team *	
Tom Test C	CareDirector	Q
	Responsible User*	
225727	Scott Simpson	Q
itus*		
Authorised		
	-	
ervice Request		
rvice Element 1*	Service Element 2*	
ISF Provider C	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 🞧 Hom	Workplace 🗸 🔞 Settin	ngs 🗸		e द्व 🛠 🖱 킻 c	areDirector
← 🖬 🗟 🎝 🎝	: Service Provision	n: Tom Test \ Carers T	rust -	205632 \ ISF Provider \ ISF \ \ \ Spot \ 225727 \ 21 Oct 2022	?
TEST,Tom (ld: 446228) Person Reco Pronouns:	Pin to me Unpin from me			Born: 03/05/1995 (27 Years) Gender: Male NH	IS No: 🗸
Preferred Name:	Budget Position Statement	2 mance Transactions			\sim
General	Calculate Cost Per Week				
Person*	Restrict Access Delete			Responsible Team*	
Tom Test	Run Workflow		Q	CareDirector Responsible User*	Q
225727	Copy Record Link			Scott Simpson	Q
Status* Authorised Service Request			Q		
Service Element 1*				Service Element 2*	_
ISF Provider			Q	ISF	Q
Special Scheme				Finance Client Category	



👗 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 HOSPITAL SOCIAL WORK 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**.

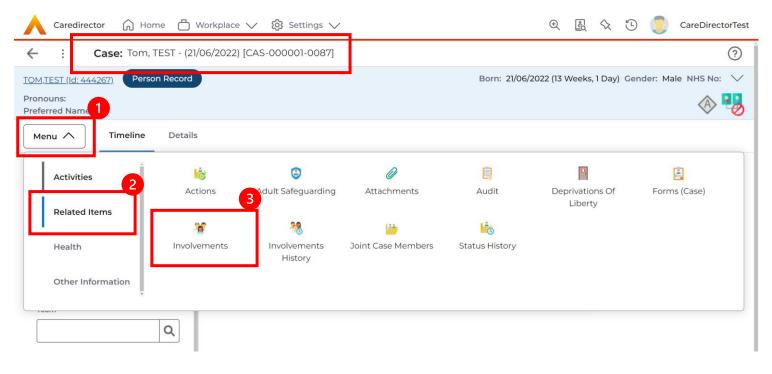
🔨 Caredirector 🎧 Home 🗂 Workplace 🗸 🕲 Settings 🗸			🔍 🎚 🛠 🕑 🌷 CareDirectorTest
	Co-ord	inatio	on Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju 🕥
TOM.TEST (Mr) (Id: 4444.			Born: 24/07/1950 (72 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name: Tom			I I I I I I I I I I 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.





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

Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings	\checkmark			t 🛃 🛠	ت 👤	CareDirectorTest
← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]						?
TOM,TEST (Id: 444267) Person Record			Born: 21/06/2	2022 (13 Weeks, 1 Day)	Gender: Male	NHS No: 🗸
Pronouns: Preferred Name:						I 🖓 🚯
Menu V Timeline Details						
+ 💷 🎗 🗑 Case Involvements						
Related Records 🗸		Search for records				Q 3
□ Involvement Member ह↓ Role Involvement Re	Case		Responsible Team	<u>Start Date</u> ₹↓	End Date	<u>Create</u>
Community Occupatio Occupational Th	Tom, TEST - (21/06/2022)	[CAS-000001-0087]	CareDirectorTest	21/09/2022		Scott



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

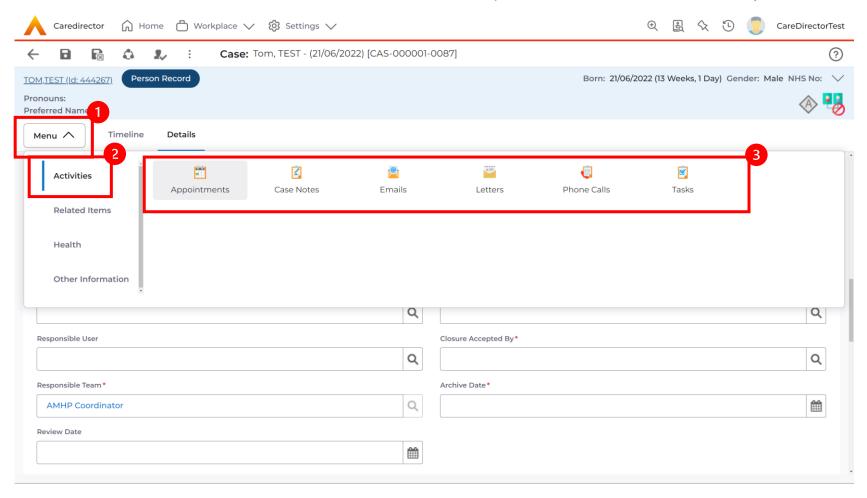
🖌 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸		🔍 🖳 🔨 🗓 CareDirect	torTes
Henu V	ent wit	nin Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o	?
General			
Case*		Responsible Team *	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	2
Person*		Involvement Priority	
TEST Tom	Q	0	٢
Involvement Member*		Involvement Status	
Community Occupational Therapy Service	Q		٢
Role*		End Date	
Occupational Therapist	Q	21/09/2022	
Start Date*		Involvement End Reason	
21/09/2022			٤
Involvement Reason		Involvement Review Date	
	Q		1
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 🗂 Wo	rkplace 🗸 👸 Settings	5 V				Ð	<u>r</u>	Ŀ		CareDirectorTest
\leftarrow	Case: Tom, TEST - (21/06/2022)) [CAS-000001-0087]									?
<u>TOM,</u>	TEST (ld: 444267) Person Record						Born: 21/06/2022 (13	Weeks, 1 Da	y) Gen	der: Ma	ile NHS No: 🗸
	ouns: rred Name:										I I I I I I I I I I I I I I I I I I I
Me	nu V Timeline Details										
+	🕼 🎣 🗑 Tasks										
Rel	ated Records	~			Search for records						Q 3
	<u>Subject</u>	<u>Due</u> ≣↓	<u>Status</u>	<u>Reg</u>	arding	<u>Reason</u>	Re	<u>sponsible T</u>	<u>eam</u>	Ē	Responsible User
	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom	, TEST - (21/06/2022)		Ca	reDirectorT	est	S	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	□ 1 kplace ∨ 🔅 Settings ∨	र्स 🚉 🔨 讫 🥊 CareDirectorTest
+ D R 🕹 🎗	: Task: Referral has been Allocated	(?)
TOM,TEST (Id: 44426 3 Person Rec	Clone 2 Bor	rn: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	Complete	A 🔧
Menu 🗸 Details	Cancel Restrict Access	-
	Delete	
General	Run Workflow	
Subject*	Copy Record Link	
Referral has been Allocated		
Description		
B I U S x₂ x² 𝒞 I _x Styles - Format - Font	ੁ := = = = ** * * = = = = ** * ■ = = = ⊕ Ω ⊭= ↓ Size ↓ ▲ ↓ ▲ ↓ ↓ □ □ □ □ □ □ ★ → ♀ ↓ ↓ ■ ♥ Q ⊕ Source ☆	
		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 🗸	
🔶 🖬 🖻 🕹 🎝 🗄	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	٩	
Review Date		
	m	



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

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🍪 Settings 🗸	\oplus 🛃 🔨 🔁 🧟 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 X Q	
Case Priority	
٩	
Responsible User	
۵	
Responsible Team *	
AMHP Coordinator	
Review Date	



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

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯	Settings 🗸	
🔶 🖬 🖹 🔕 🎝 : Case: Tom,	TEST - (21/06/2022) [CAS-000001-0087]	?
TOM,TEST (ld: 444267) Person Record	بر بر	rn: 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	
Assignment Information	Name ↓ Code Gov C □ Awaiting allocation (unscheduled revi ^	
Case Status*		
Assign To Team	Closed & Logged As Enquiry	
Case Priority	Closed as a Contact	
	Closed Under Review	
	Closure Request Rejected	
Responsible User	Closure Requested	
	,, *	
Responsible Team*	H 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 🗸	l screen, mov	e mouse f	to top of screen or press [71]	reDirec	torTest:
← 🖬 🗟 & I₂ : Case: Tom, TEST - (21/06/2022) [CAS-000001-008′					?
OM,TEST (Id: 444267) Person Record			Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male	NHS No	o: 🗸
Pronouns: Preferred Name:				$\langle A \rangle$, 📲
Menu V Timeline Details					
Assignment Information		_			^
Case Status*		L	Close Date*		
Closed	× ¢	2	03/10/2022 🛍 13:43	C	Э
Case Priority			Closure Reason*		
	C	2	All Work Completed	× °	2
Responsible User		L	Closure Accepted By*		
	C	2	Scott Simpson	× °	۲
Responsible Team *			Archive Date*		- 1
AMHP Coordinator	C	2	28/10/2022	Ê	a
Review Date					-
	Ê	≙			- 1

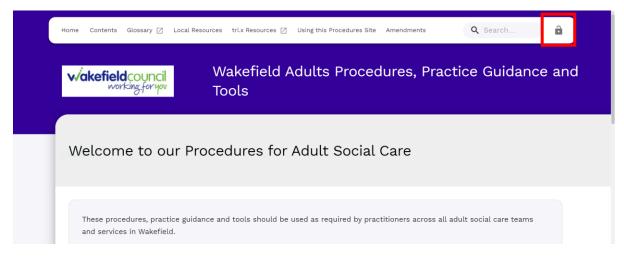
5. When finished, select **Save** and an activity will be automatically generated to the **Case Manager** or **Team Manager** to **Close**.



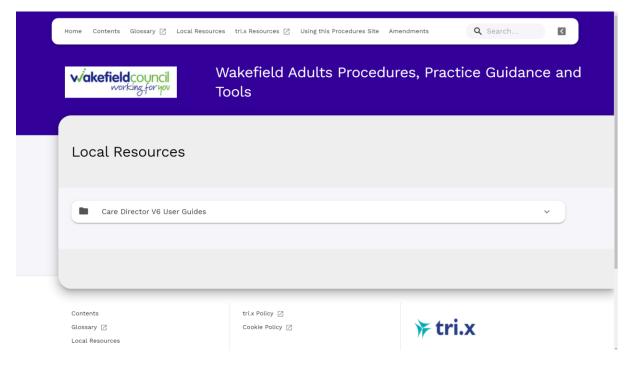
CAREDIRECTOR HOSPITAL SOCIAL WORK TEAM

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