



# Care and Support Commissioning V1.0

**Document** CareDirector Care and Support Commissioning.

Purpose Care and Support Commissioning's daily tasks on CareDirector.

Version V1.0

Owner ICT Business Transformation Team

Last Updated 11/11/2022



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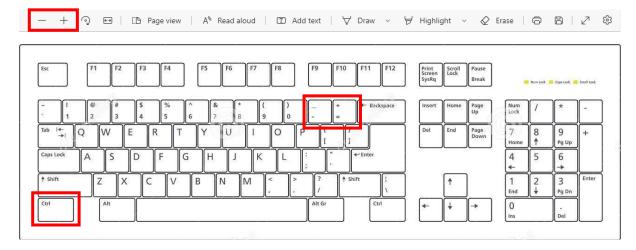
### **Guide Information**

#### 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.
- 2. Zoom In/ Out if a page requires this, select the + icons on the toolbar alternatively, Ctrl (Hold) and (Press) or Ctrl (Hold) and + (Press) on your keyboard.



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

- + 🤉 🖽 | 🗈 Page view 🛛 A<sup>®</sup> Read aloud | 🗊 Add text | 🖓 Draw 🗸 😾 Highlight 🗸 🖉 Erase | 🛱 🛱 | 🖉 🕸



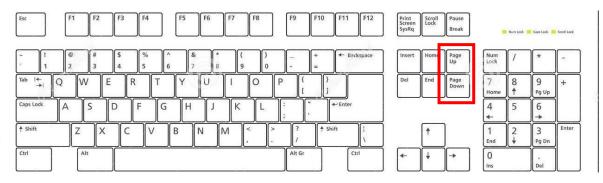
4. For auditory assistance, select Read Aloud from the toolbar.

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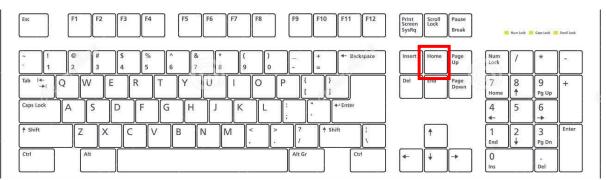
5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

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	CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING	
	Contents	
	Guide Information	
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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.



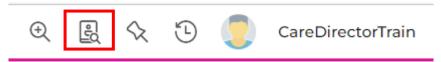
7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.





# 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**.

		e Allowed	
First Name			
Tom			
Middle Name			
Last Name			
MullenTest			
Stated Gender			'
		~	
NHS No.			
DOB		 	
		 Ê	
Use Date of Birth F	Range		
Date of Birth From			
		<b>#</b>	
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).

Caredian 🗇 Home 🗂 Work	place 🗸 🔞	Settings 🗸		0 8 4 0	CareDirectorTe
🔶 🖊 🦻 🔗 Person: TE	ST Tom				?
OM,TEST (ld: 444267) Person Record			Born: 2	1/06/2022 (15 Weeks, 0 Day) Ger	ider: Male NHS No: 🗸
ronouns: referred Name:					I 🖓 🔧
Menu V Timeline Summary	Profile C	ases Services Do	cument View All Activities		
Filter By		OCT 2022			
~		Form (Case) Crea	ted		Yesterday at 15:05
From		A new record of form (	(case) was created by Scott Simpson.		
<b>#</b>					
То		Due Date:	Form Type: AMHP Report Form	Status: In Progress	
<b>m</b>					
Team		Service Provision	Created		Yesterday at 10:12
Q	$\langle \mathbf{\Psi} \rangle$	A new record of servic	e provision was created by Scott Simpson.		
Profession Type	T	Actual Start Date:	Service Provided:	Status:	
Q			Co-ordination Team \ SDS - WM Managed Account \ Home Car		
		SEP 2022			
		Task Created			28/09/2022 13:58:47
	Y	A new record of task w	vas created by Scott Simpson.		
Reset Refresh Apply					

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

Caredirecte 1 Home 🗇 Workplace 🗸 🕸 Settings 🗸	0् 🧕 😓 😓 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:	I I I I I I I I I I I I I I I I I I I
Personal Details	
ld*	Profile Picture
444267	/
Title	
First Name	
TEST	NHS No.
Middle Name	
	Reason for no NHS No.
Last Name*	٩
Tom	Ethnicity*
	White British X Q
Stated Gender*	Marital Status
Male	Divorced X Q



# How to find Activities

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

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

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

• • • Ø P	erson: Tes	t Tom						(
M,Test (Id: 446229) Person Re	cord						Born: 03/05/1996 (26 Years) Gender	: Male NHS No: \
nouns: ferred Name:						1		🚸 🍕
Menu 🗸 Timeline S	Summary	Profile	e Cases Se	rvices Documen	t View Al	Activities		
a 🖬 🗗 All Activ	vities							
Keyword		0	Regarding	<u>Subject</u>	Activity	<u>Status</u>	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
Created Date	~		Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
From		<						
02/10/2022	雦	Ē						
То								
01/11/2022	Ê							
Actual End (From)								
	<b>#</b>							



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

Caredirector 🎧 Home 🗂 W	/orkplace 🔨	🗸 🔞 Settings 🗸				Q L 🔍 🗘	CareDire
– 🖍 🖣 🔗 Person:	Test Tom						(
M.Test (Id: 446229) Person Record						Born: 03/05/1996 (26 Years) Gender:	Male NHS No:
onouns: eferred Name:							À 📎
Menu 🗸 Timeline Summa	ry Profi	le Cases Se	vices Documen	t View All A	Activities		
All Activities							
Keyword	Ô	Regarding	Subject	Activity	Status	Start/Due Date Actual End	Case Note
		Test Tom	Case	Task	Open	03/11/2022 14:00:	No
Activity Type		Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:40:	Yes
All		Tom, Test - (03/0	Case has been al	Task	Open	31/10/2022 10:29:11	Yes
Date Type		Test Tom	Date of Death E	Task	Open	26/10/2022 13:44:	Yes
Created Date		Test Tom \ Willia	Booking request	Task	Open	21/10/2022 15:37:26	Yes
		Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
From							
То							
01/11/2022	1						
Actual End (From)							
	•						
Clear Filters Search 2	* 						

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

Caredirector 🔓 Hor	ne 🗌 work	Jace \	🗸 🔞 Settings 🗸				Q 🛃 🛠 🗓	CareDiree
- 1 4 0	Person: Tes	st Tom						(
M,Test (Id: 446229) Person	n Record						Born: 03/05/1996 (26 Years) Gender	: Male NHS No: 🚿
nouns: ferred Name:								🛞 🍕
Menu 🗸 Timeline	Summary	Prof	ile Cases Ser	vices Documen	t View All	Activities		
	ctivities							
Keyword		Î	Regarding	<u>Subject</u>	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
Data Tura			Test Tom	Date of Death E	Task	Open	26/10/2022 13:44:	Yes
Date Type Created Date			Test Tom \ Willia	Booking request	Task	Open	21/10/2022 15:37:26	Yes
Created Date	~		Test Tom \ THE L	Service provisio	Task	Open	21/10/2022 01:00:	Yes
From		<						
	雦	Γ.						
Го								
01/11/2022	Ê							
Actual End (From)								
	<b>#</b>							
		<b></b>						



#### 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							I
Menu A Timeline	Details						
Activities	E Appointments	Case Notes	(©) Emails	Letters	Phone Calls	<b>T</b> asks	
Related Items							
Other Information							
Responsible User			Q				
Responsible Team*			X				
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]					?
TON	1.TEST (ld: 444276)					Born: 24/07/1950 (72 Years) Gend	er: Male NHS No: 🗸
	nouns: ierred Name: Tom	-					🚸 🔧 오
M	lenu 🗸 Timeline Details						
+	Tasks						
R	elated Records	~					
	elated Records	*		Search for records			Q G
	Subject	<u>Due</u> ≣↓	<u>Status</u>	Search for records	Reason	Responsible Team	Responsible User
)			<u>Status</u> Open		<u>Reason</u>	Responsible Team CareDirectorTest	
	Subject	<u>Due</u> ≣↓		Regarding	<u>Reason</u>		
	<u>Subject</u> CHC Funding Decision - Fully funded	<u>Due</u> ₹↓ 24/06/2022 08:48:05	Open	<u>Regarding</u> Tom, TEST - (24/07/1950	<u>Reason</u>	CareDirectorTest	



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

🔶 Caredirect 2 🗋 Home 📋 Workplace 🗸 🔅 Settings 🗸			Q 🎚 🛠 🕑 🌅 CareDirec	torTest
🔶 🖬 🕼 🗸 🗙 Case Note (For Case): New				?
TOM,TEST (Id: 444267) Person Record			Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No	o: 🗸
Pronouns: Preferred Name:			۸	
Details				
Details				
Case*			Responsible Team *	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	хa	٤	CareDirectorTest X C	
Reason			Responsible User	
	a	٤	Scott Simpson X C	٦
Priority		_ •	Category	
	a	٤	C	2
Date*			Sub-Category	
<b>m</b>	C	•	C	2
Status*			Outcome	
Open	~		C	λ
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): Adult	t - Change to	Service Request for Mullen1	est, Tom - (03/05/1955) [CA	\S-000001-000
JLLENTEST 2 ,Id: 444264) Verson Record			Born: 03/05/1955 (67 Years) G	ender: Male NHS No:
onouns: eferred Name:				🚸 🌄 🛤
Menu 🗸 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		i
Complete	~	23/06/2022		曲
Not Started		Review Date		
In Progress Complete				曲
Closed Cancelled				
Approved	Q			

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 =				

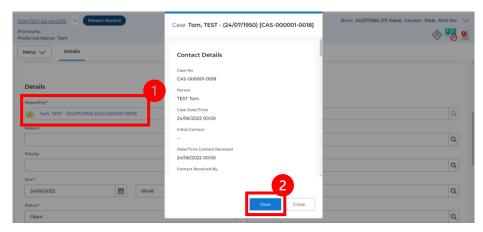


#### How to tell if an Activity is linked to a Case or Person Record

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 🗸	Q 🛃 🛠 🗓 🌅 CareDirectorTest
🗲 🖪 🗟 🕹 🎝 Task: CHC Funding Decision - Fully funded	0
TOM.TEST (ld: 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 2	
Regarding *	Responsible Team *
Tom, TEST - (24/07/1950) [CAS-000001-0018]	CareDirectorTest Q
Reason	Responsible User
Q	٩
Priority	Category
Q	٩
Due*	Sub-Category
24/06/2022 🏥 08:48 🛇	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?

- 2. If the symbol is a folder and the name in the field has (CAS-XXXXXXX) then it is linked to a **Case**.
- 3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.
- 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?		<b></b>		
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 🛃 🛠 🕑 킻 CareDirector
🗲 🖬 💀 🗸 Task: New	(?)
MULLENTE 2 (Id: 446230) Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	In the second
Details	
Regarding*	Responsible Team *
Image: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]         X         Q	Sensory Impairment Team X
Reason	Responsible User
٩	Scott Simpson X Q
Priority	Category
Q	٩
Due*	Sub-Category
	٩
Status*	Outcome
Open v	٩
Contains Information Provided By A Third Party?	Is Case Note?
O Yes	O Yes
No	No



#### How to Allocate an existing Activity to another team

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

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

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

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



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

🔶 Caredirector 🎧 Home 🗂 Workplace 🗸	பி Settings V	🔍 🛃 🏡 🔁 🌅 CareDirector
🔶 🖬 🔞 🔕 🎝 i Task: Tes	st	0
MULLENTEST.Tom (Id: 446230) Person Record Pronouns: Preferred Name:	Assign	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Menu V Details	Responsible Team*	
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	
0.11		

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

人 Caredirector 🎧 Home 🗂 Workplace 🗸	ĝ Settings ∨	0 🖳 🛠 🖸 🌅 CareDirector
🔶 🖻 🗟 👶 🎝 i Task: Tes	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	Adults Connecting Care Team West     X     Q	
Regarding*	Responsible User Decision *	
MullenTest, Tom - (03/05/1995) [CAS-000001-0011]	Do not change 🗸 🗸	٩
Reason	1	
		Q
Priority		
		Q
Due*		
28/10/2022		Q
Status*		
Open	2	۹
Contains Information Provided By A Third Party?	OK Close	
O Yes		

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.

🔶 Caredirector 🔄 Home 📥 Workplace 🗸 🐯 Settings 🗸	Q 🛃 🛠 🖱 🌅 CareDirectorTest
← S L C C C C C C C C C C C C C C C C C C	0
TOM.TEST (Id: 444267)  Person Record	Born: 21/06/2022 (20 Weeks, 4 Days) Gender: Male NHS No: 🗸
ronouns: referred Name:	I I I I I I I I I I I I I I I I I I I
Menu 🗸 Details	
General	
Subject *	
Test subject P&A fdjndf	
Description	
B I U 5 x, x'   ✓ Ix   # #   11   ± ± ± ± ≡   = ∞ ₱   ⊞ ≣	Θ Ω Ξ
Styles -   Format -   Font -   Size -   🚣 - 🖾 -   🗶 🔂 🕅 🕅 🔯 📥	へ しる 第 学 Q B Source
This is done.	

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 🞧 Hom	ne 🗂 Workplace 🗸 🕅	Settings 🗸		€ 🛃 🛠	🕑 🏮 CareDirectorTest
< 1 4 0	Person: TEST Tom				0
TOM,TEST (Id: 444267) Persor	n Record		Born:	21/06/2022 (15 Weeks, 0 Day	) Gender: Male NHS No: 🗸
Pronouns: Preferred Nam					I I I I I I I I I I I I I I I I I I I
Menu 🔨 Timeline	Summary Profile	Cases Services	Document View All Ad	tivities	3
Activities		<b>9</b>	<b>B</b>	Щ	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
		20	2	<b>a</b>	<b>é</b>
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 🗂 W	/orkplace 🗸 🔅 Settings 🗸		Ð	R & U	CareDirectorTest
🔶 🖋 🦸 🔗 Person:	TEST Tom				(?)
TOM,TEST (Id: 444267) Person Record			Born: 21/06/2022 (15 V	Veeks, 0 Day) Ger	ider: Male NHS No: 🗸
Pronouns: Preferred Name:					A 🛃
M 1 Timeline Summa	ry Profile Cases Services	Document View	All Activities		
🕂 🕮 🕮 🗑 Attachn	nents (For Person)				
Related Records 🗸		Search for reco	rds		Q 3
Title	Document Type Docum	ent Sub Type	Date	Created By	Created On
	No resu	RECORDS lits were found this screen.			



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

👗 Caredirector 🎧 Home 🗂 Workplace 🤍 🕸 Settings 🗸	@ हि 🛠 🕲 🧔 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*	O Yes
Clients X Q	No
Document Sub Type *	
٩	
Cloning Information	
Is Cloned?	Cloned From
○ Yes	
No	

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

C Open						×
← → ~ ↑ 🔒 > Th	is PC → Documents → CareDirector V6 → I	ME Training		ب	Search ME Training	
Organise 👻 New fold	1					
OneDrive	Name	Datemodified	турс	Size		
<ul> <li>OneDrive</li> </ul>	Training Superuser Booking Sheet	09/03/2022 10:27	Microsoft Excel C	1 KB		
This PC						
🗊 3D Objects						
Desktop						
Documents						
Downloads						
Music						
E Pictures						
Videos						
🏭 Windows (C:)						
🛖 Datastore (G:)						
🛖 scottsimpson Us						
File n	ame: Training Superuser Booking Sheet			~ 4	ll files 2	~
				[	Open Ca	incel

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

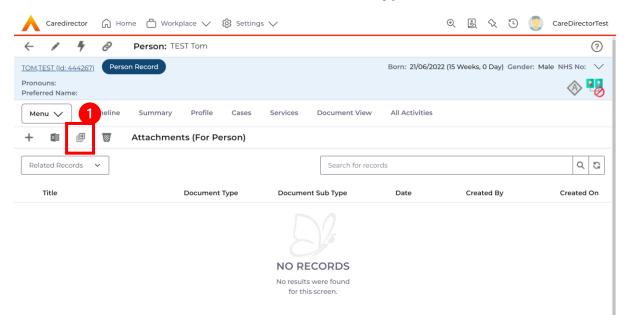


#### How to upload multiple attachments

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 🞧 Hon	ne 🗂 Workplace 🗸 🕅	Settings 🗸		) E	🕒 🏮 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	ctivities	3
Activities 2	<b>e</b>	<b>Q</b>	Rin (	<b>B</b> 1	Ø
Related Items	Addresses	Alerts And Hazards	Allegations (Alleged Abuser)	Allegations (Alleged Victim)	Attachments
	Ē	20	2	<u> </u>	<b>é</b>
Health	Audit	Complaints And Feedback	Contacts	Forms (Person)	Primary Support Reasons
Mental Health Act	0				
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 🖻 Workplace 🗸 🛞 Settings 🗸	🔍 द्वि 🛠 🛈 🌅 CareDirectorTest
- / 4 🔗 Person: TEST Tom	0
IOM.IEST (Mr).(d: 444276) V Person Record	Born: 24/07/1950 (72 Years) Gender: Male NHS No: ∨
Pronouns: Preferred Name: Tom	I 😔 😫
Menu V Timeline Summary Profile Cases Services Document View All Activities	
🕂 💷 🕮 👹 Attachments (For	-
Related Records ~	Q 0
Title Document Type* Responsible Team*	Created On Modified By M
CareDirectorTest X Q	
Document Sub Type*	
Files	
Files	
Browse for 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 🗸 🔞 Settings 🗸	€	B 🛇	ত 🏮	CareDirec	ctorTest
- 🖌 🖣 🔗 Pers	son: TEST Tom					?
TOM.TEST (Mr) (Id: 444276)	rson Record	Born: 24/07/19	50 (72 Years	) Gender: Ma	le NHS No:	$\sim$
Pronouns: Preferred Name: Tom					۹ 🔄	•
Menu 🗸 Timeline Sum	nmary Profile Cases Services Document View All Activities					
🕂 🕼 🕮 👿 Attac	chments (For	_				
Related Records V	Upload Multiple Files				Q	S
Title	Docum	Create	ed On	Modified B	Зу	м
	Files Frowse for Files. Drop files here to attach them 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).** 

\rm Caredirector 🎧 Home 🗂 Workplace 🗸	ĝ Settings 🗸				Q B &	CareDirectorTest
← : Case: Tom, TEST - (21/06/2022) [CAS-0	000001-0087]					(?)
TOM TEST (Id: 444267) Person Record				Born: 21/06	/2022 (14 Weeks, 6 Days	) Gender: Male NHS No: 🗸
Pronouns: Preferred Nan 1						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	٢	0			*	
	Adult Safeguarding	Attachments Au	dit Deprivations Of Liberty	Forms (Case)	Involvements	Involvements History
Related Items	10					
Other Information Joint Case Members	Status History					
	-					
<b>m</b>		Form (Case) Created				21/09/2022 13:04:25
Team	Ŷ	A new record of form (case) was create	ed by Scott Simpson.			
Profession Type		Due Date:	Form Type:		Status:	
Q 4			AMHP Report Form		In Progress	
		Case Involvement Updated				21/09/2022 12:23:12
		Scott Simpson changed End Date from	n 'Empty' to '21/09/2022'.			
		Involvement Member:	Role:		Start Date:	
		Community Occupational Therapy Ser	vice Occupational Therapist		21/09/2022	
		Case Involvement Created				21/09/2022 12:17:20
		A new record of case involvement was	created by Scott Simpson.			
Reset Refresh Apply		Involvement Member:	Role:		Start Date:	

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

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🚳 Settings 🗸					• E 🛠	🕒 🌅 CareDir	ectorTest
← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]							0
TOM,TEST (Id: 444267) Person Record				Born: 21/	06/2022 (14 Weeks, 6 Days	s) Gender: Male NHS N	lo: 🗸
Pronouns: Preferred Name:						4	> 🔧
Menu V Timeline Details							
+ 💷 🎗 🗑 Forms (Case)							
Related Records 🗸			Search for records			(	Q 23
Due Date Fi Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Dat	e <u>Sign</u> i
AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			



#### How to add a Form

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

\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 🞧 Hor	me 🗋 Workplace	> 袋 Set	tings 🗸					CareDirectorTest
← : Case: Tom, T	TEST - (21/06/2022)	[CAS-00000]	1-0087]					0
TOM,TEST (Id: 444267) Perso	n Record					Born: 21/06/2	022 (15 Weeks, 0 Day) G	ender: 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	<b>i</b>	٢		Ø		Q		*
Related Items	Actions	Adult Safeg	uarding	Attachments	Audit	Deprivations Of Liberty	Forms (Case)	Involvements
	28	( <del>**</del>						•
Other Information	Involvements History	Joint Case N	1embers	Status History				
		1						
Team			<u>Form (C</u>	<u>ase) Created</u>				21/09/2022 13:04:25
	Q (	$\mathbf{\mathbf{\forall}}$	A new rec	ord of form (case) was ci	eated by Scott Sim	pson.		
Profession Type	Q		Due Date:		Form Type: AMHP Rep		Status: In Progress	
	~		<u>Case Inv</u>	volvement Updated	i			21/09/2022 12:23:12
		Ŷ	Scott Sim	pson changed End Date	from 'Empty' to '21/	<sup>'</sup> 09/2022'.		
Reset Refresh Ap	oply		Involvemen Communi Service	it Member: ty Occupational Therapy	Role: Occupatio	onal Therapist	Start Date: 21/09/2022	



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

Case: Ton	n, TEST - (21/06/2022) [CAS-000001-008	7]				(?
<u>DM,TEST (Id: 444267)</u>	Person Record			Born: 21/06/2	022 (15 Weeks, 0 Day) Gend	er: Male NHS No: 🚿
ronouns: referred Name:						I 🛞 🖳
M <b>1</b> T	imeline Details					
Related Records	~		Search for record	ls		0,5
<u>Due Date</u> ≣↓	Form Type	Start Date	<u>Status</u>	Responsible User	Responsible Team	Completed By
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest	

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

Caredian G Home ☐ Workplace ∨ ⑧ Settings ∨				€	<u>الم</u>	$\Diamond$	٩		CareDi	rectorTest
🔶 🖬 🕼 Form (Case): New										?
TOM,TEST (Id: 444276) Y Person Record			Bo	orn: 24/07/	1950 (7	2 Year	s) Gen	nder: M	tale NHS	No: 🗸
Pronouns: Preferred Name: Tom										0
Details										
General										
Case*		_	Responsible Team *							
Tom, TEST - (24/07/1950) [CAS-000001-0018]	XQ	L	CareDirectorTest						×	Q
Form Type*	_		ponsible User							
	Q	Ł								Q
Status*			Due Date							
In Progress	~									雦
Start Date*			Review Date							
21/10/2022	Ê	1								<b>#</b>
Preceding Form										
	Q	L								
A dažaja 1 1 - 6										



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 🗸		오 ଣ 🔦 ୯	) 🥊 CareDirectorTe
🖬 💀 🖍 🖬 🗄 Form (Case): AMHP Report	Form for Tom, T	EST - (21/06/2022) [CAS-000001-0087] Starting 21/09/2022 created	d by Scott Sim 🤇
1 <u>TEST (ld: 444267)</u> Person Record		Born: 21/06/2022 (15 Weeks, 0 Day) G	ender: Male NHS No:
nouns: ierred Name:			A 🖣
lenu 🗸 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	~		<b>#</b>
start Date*		Review Date	
21/09/2022	<b>m</b>		<b>#</b>
Preceding Form			

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

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



#### How to Allocate a Form

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

Caredirector 🎧 Home 🕻	🗂 Workplace 🗸 🐯 Settings 🗸			€	ł	$\Diamond$	3		CareDire	ectorTest
🔶 🖻 🗟 🖌 🖨	: Case): Adult - Change t	to Service Requ	uest for Tom, TEST - (24/07/1950) [CAS-0000	01-00	18] Sta	rting	20/10/	2022 c	reate	?
TOM,TEST (Id: 444276) 🗸 Person	Print History		Born:	24/07/	1950 (7	2 Years	) Gen	der: Ma	ale NHS	No: 🗸
Pronouns: Preferred Name: Tom	Share								A ?	8
Menu 🗸 Details	Assign 3									
	Clone									
	Sync with PDS									
General	Restrict Access									- 1
Case*	Delete		Responsible Team *							- 1
Tom, TEST - (24/07/1950) [CAS-00	Run Workflow	Q	CareDirectorTest							Q
Form Type*	Copy Record Link		Responsible User							
Adult - Change to Service Reque	st	Q	Scott Simpson						$\times$	Q
Status*			Due Date							
In Progress		~	27/10/2022							<b>m</b>
Start Date*			Review Date							
20/10/2022		<b>m</b>								<b>#</b>
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 🗸	🔍 🛃 🛠 🗿 🌅 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		<b>*</b>
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**.

viakefieldcouncil working for you

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸	ĝi Settings ∨	€	ł	\$ 3		CareDire	ectorTest
🔶 🖬 🕼 🖍 🖨 🗄 Form (C	ase): Adult - Change to Service Request for Tom, TEST - (24/07/1950) [CA	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	der: M	ale NHS I	No: 🗸
Pronouns: Preferred Name: Tom							0
Menu V Details	Accommodation Team						
General	Responsible User Decision*						
	Clear on current record only v						
Case*	Include Inactive?	-					a
Form Type*	Related Records to Include C Check/Uncheck All						~
Adult - Change to Service Request	Appointment					×	۹
Status*	Ssessment Factor						
In Progress	✓ Attachment (Case Form)						
Start Date*	✓ Email						
20/10/2022	Email Attachment						
Preceding Form	OK						
a dalalara at taɗa wasakina							



#### 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 🗸 8	ĝ] Settings 🗸					CareDirect
: Case: Tom, TEST - (21/06/2022) [CAS-0	.00001-0087]					
TEST (Id: 444267) Person Record				Born: 21/06/202	2 (14 Weeks, 6 Days) C	iender: Male NHS No:
ouns: erred Nan 1						۵
nu 🔨 Timeline Details				3		
Activities 2	٢	0			W	
Actions A	dult Safeguarding	Attachments Audit	Deprivations Of Liberty	Forms (Case)	Involvements	Involvements History
Related Items	12					
Other Information Joint Case Members	Status History					
Sont Case members	Status matory					
<b>m</b>	1					
m	Eorm	(Case) Created				21/09/2022 13:04:2!
Q		record of form (case) was created by S	icott Simpson.			
fession Type	Due Dat	.ec	Form Type:	SI	atus:	
Q (			AMHP Report Form	Ir	Progress	
~ -	C250	Involvement Updated				21/09/2022 12:23:12
	(ma) Case	involvement opdated				
	(*)					
		impson changed End Date from 'Emp	oty' to '21/09/2022'.			
	Scott S	nent Member:	Role:	SI	art Date:	
	Scott S				art Date: /09/2022	
	Scott Si Involven Commi	nent Member:	Role:			21/09/2022 12:17:20
	Scott S	nent Member: unity Occupational Therapy Service	Role: Occupational Therapist			21/09/2022 12:17:20

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

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] <u>TOM,TEST (kt:444267)</u> Person Record Pronouns:	Born: 21/06/2022 (14 Weeks, 6 Days) Cender: Male NHS No:
Pronouns:	Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: 🗸
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	
+ 💷 🎣 🗑 Forms (Case)	
Related Records V	Search for records Q Q
□ <u>Due Date</u> F↓ <u>Form Type</u> <u>Start Date</u> <u>Start</u>	atus Responsible User Responsible Team Completed By Completion Date Sig
AMHP Report Form 21/09/2022 In P	Progress Scott Simpson CareDirectorTest



Caredirector 🞧 Home	C v li Settings ∨			€	<u>s</u> 🛇	٣	CareDirectorTest
< 🖬 🗟 🖍 🖷	Form (Case): AMHP Report Form for Tom, TEST - (21/	/06/202	22) [CAS-000001-0087] Starting 21/09/2022 created by Scott	Simps	on		0
TOM,TEST (Id: 444267) Person Reco	Print History		Born: 21/06/20	22 (14 W	eeks, 6 Da	iys) Gend	der: Male NHS No: 🗸
Pronouns: Preferred Name:	Share 2						I 🕹 😣
Menu V 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		~					<b>m</b>
Start Date*			Review Date				
21/09/2022		雦					曲
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.** 

		P Report Form for Tom, TI	EST - (21/06/2022) [CAS	5-000001-0087] S			
TEST (Id: 444267) Person Record					Bo	orn: 21/06/2022 (14 Weeks, 6 )	Days) Gender: Male NHS No:
ouns: erred Name:							$\otimes$
enu 🗸 Details							
	Clone Form (Case)						
General	Start Date of Form *						
aso*	03/10/2022	m					
Tom, TEST - (21/06/2022) [CAS-00	03/10/2022						
	Person	Case	Case Start Date	Case Status	Responsible Team	Responsible	~
orm Type*	TEST Tom (Primary	CAS-000001-0010	21/06/2022 07:00	Assign To Team	CareDirector Support		
AMHP Report Form	TEST Tom (Primary	CAS-000001-0087	20/09/2022 09:2	Assign To Team	AMHP Coordinator		XQ
tatus*							
In Progress	I≪ ♥ Page 1 ►					1-2	<b>#</b>
art Date*							
21/09/2022							<b>m</b>
receding Form							
						_ 1	
					Clor	ne Cancel	
dditional Information							
eparate Assessment			Combin	ned Carer Assessment			
Yes			O Yes				

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



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

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸		<b>ब</b> 🖳 🗞 🛈 🌅 cdv	6 Team
🔶 👁 📮 🔂 : Form (Case): Adult Care and Supp	oort Pla	an for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022	?
TOM,TEST (ld: 444267)   Person Record		Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS N	o: 🗸
Pronouns: Preferred Name:		I I I I I I I I I I I I I I I I I I I	2
Menu V Details			
General			
Case*		Responsible Team*	
Tom, TEST - (21/06/2022) [CAS-000001-0087]	Q	CareDirectorTest	Q
Form Type*		Responsible User	
Adult Care and Support Plan	Q	Scott Simpson	Q
Status*		Due Date	
Closed	~	11/11/2022	<b>#</b>
Start Date*		Review Date	_
09/11/2022			<b>#</b>
Preceding Form			
	Q		
Completion Details			
Completed By*		Completion Date*	
Scott Simpson	Q	09/11/2022	<b>##</b>
Signed Off By*		Signed Off Date*	
Scott Simpson	Q	09/11/2022	<b>#</b>



#### 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.

Caredirector 🎧 Home 📥 Workplace 🗸 🕸 Settin	ngs 🗸	🔍 🛃 🔨 🗓 CareDirectorTest
🔶 👁 🛱 🗟 : Form (Case): Occupation	onal Therapy Co	nversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St
TOM,TEST (Id: 444267)		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 Q
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	<b>**</b>	<b>**</b>
Preceding Form		

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

Caredirector 🞧 Ho	ome 💾 Workplace	✓ 🐯 Settings ✓			€	Ę	$\Diamond$	€		CareDirec	torTest
← ● 🖬 🗟	: Urm (Ca	se): 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								A	- 🔧 🤇	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	2
Status*				Due Date							
Closed			~	20/12/2022						Ê	<b>1</b>
Start Date*				Review Date							
10/11/2022										Ê	1
Preceding Form											
scriptunid(0):											



### How to search for a Provider

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

Finance	Caredirector	Home 🖰 Workplac	a ∧ 🐼 Settings ∖	<i>✓</i>		CareDirector
Finance   Admin     Providers        Providers     Professionals     My Diary   Contacts   Carer Exemption   Extension     Person: Train Kayode   Due Date: 12/09/2022   Case: Deborah, Train - (24/11/1983) [CAS-000001-0331]     Person: Train Kayode   Due Date: 12/09/2022     Pue Date: 12/09/2022     Pue Date: 12/09/2022     Person: Sarah Train	My Work		8	2	( <del>*</del> )	
Admin Providers Professionals My Diary Contacts Carer Exemption   + © + ©   Due Date: 12/09/2022 Case: Deborah, Train - (24/11/1983) [CAS-000001-0331] + ©   Due Date: 12/09/2022 Case: Deborah, Train - (24/11/1983) [CAS-000001-0331] Person: Train Kayode Due Date: 28/07/2022   Due Date: 12/09/2022 Person: Sarah Train		Dashboard 2	Reports	People	Cases	Forms (Case)
Admin Extension	Finance	<b>A</b>	<u>.</u>	6	2	<u>.</u>
Due Date: 12/09/2022     Person: Train Kayode       Case: Deborah, Train - (24/11/1983) [CAS-000001-0331]     Due Date: 28/07/2022       Due Date: 12/09/2022     Person: Sarah Train	Admin	Providers	Professionals	My Diary	Contacts	Carer Exemption And Extension
Case: Deborah, Train - (24/11/1983) [CAS-000001-0331]         Due Date: 28/07/2022           Due Date: 12/09/2022         Person: Sarah Train		122	i		ode	
Due Date: 12/09/2022     Person: Sarah Train			001-0331]			
	Ø 2			Ø 2 <sup>7</sup>		
			-000001-03341			
		,				

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

	Caredirector	🔓 Home 📋 Workpla	ace 🗸 🔯 Settings 🗸		+ Ę	5 D 🔇	CareDirectorTrain
$\leftarrow$	+ 🖾	<i>@∂</i> <b>1</b> , : P	Providers				?
м	y Team Providers	~		Search for records			Q 13
	ld	<u>Name</u> ≟↓	Provide	er Type Account	Number	Email	Main Phone
	1	Croft Care Services	Supplie	er			01924 22016

Page 1	1-1
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#### How to set up a new Provider

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

My Work			2	i 📥	<u>a</u>
	Dashboard 2	Reports	People	Cases	Forms (Case)
Finance		<u> </u>		2	<b>.</b>
Admin	Providers	Professionals	My Diary	Contacts	Carer Exemption An Extension
9 + C			+ 3		
Due Date: 12/09/ Case: Deborah, 1	′2022 Frain - (24/11/1983) [CAS-000	001-0331]	Person: Train Kayo Due Date: 28/07/2		
Ø 2 <sup>7</sup>			Ø 2*		
			Person: Sarah Trai		

2. If the **Provider** required is not on CareDirector, select the **Create New Record** plus icon on the toolbar. This will open the **Provider Creation Screen.** 

Caredizator 🔓 Home 🖨 Workplace 🥆	🗸 👸 Settings 🗸	<del>(</del> ) हि	x 🖸 🌅	CareDirectorTrain
- + 💵 🌮 🎝 🗄 Provie	ders			?
My Team Providers 🗸 🗸	Search fo	or records		QG
□ <u>Id</u> <u>Name</u> ≟↓	Provider Type	Account Number	Email	Main Phone
1     Croft Care Services	Supplier			01924 22016

N A Pag	el 🕨



3. Fill in the appropriate information, ensuring all fields marked with a red asterix (\*) are completed. When finished, select **Save** from the toolbar.

Caredirector	Home	🗂 Workpl	ace 🗸	🏠 Set	tings '	$\sim$	Ð	PO	$\Diamond$	Ŀ	CareDir	ectorTrain
← 🖬 🖻	Provide	r: New										?
Details												
ld •						Responsible Team *						
						CareDirectorTrain					×	Q
Name*						Start Date						_
New provider												
Provider Type*						End Date						_
Agency					~							
Account Number					_							
Parent Provider												
					Q							



#### How to add a Service Type

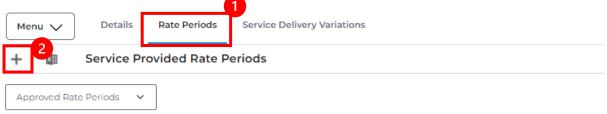
1. Locate the **Provider**. Select the **Services Provided** tab and select **Create New Record** from the toolbar.

	Caredirecto	or 🎧 Horr	e 🗂 Workplace	✓ 🐯 Settings ✓						€	<u>e</u>	$\Diamond$	3	0	CareDirectorTest
←	: P	Provider: 1⊢	IILL CLOSE												0
	L CLOSE (ld: 18 : Supplier	<u>36414)</u> Prov	vider Record		1										$\sim$
м	2	Timeline	Summary Det	ails Service Provisions	Services Provid	ed Suspension	s Service Deliver	/ Variations Fin	ance Transactions						
+	- L	×	Services P	rovided											
Re	lated Records	. ~				S	earch for records								αυ
	Id [Provid	Provider	ld	Approval Status	Service Elem 斗	Service Element 2	Service Element 3	Client Category	Contract Type	Cu	rrent F	Rankin	19 [	Negoti	ated Rate GL C
	186414	1 HILL CLOSE	E 30047	Approved	Adult Residentia	Long-Term Care		Learning Disabili	Spot					No	
	186414	1 HILL CLOSE	31400	Approved	Adult Residentia	Long-Term Care		Older People Le	Spot				1	No	

2. The **Services Provided** creation screen will show. Fill out the information ensuring all mandatory fields are completed before **Saving**.

🔨 Caredirector 🛕 Home 🗂 Workplace 🗸 🏟 Settings 🗸	छ् ট্র 🛠 🛈 🌅 CareDirectorTest
← 🖬 🔂 Service Provided: New	0
Test Provider, Provider Record	$\checkmark$
Type: Supplier	
Details	
General	
Provider* Responsible Team	•
Test Provider Q CareDirector	Test X Q
Service Element 1* Responsible User	
Q Scott Simpso	n X Q
Service Element 3 Approval Status*	
Q Pending	×
Contract Type* Id*	
Spot v	
Negotiated Rates Apply* Client Category	
O Yes	Q
No     Current Ranking	
Used In Finance*	Q
O Yes	

3. When **saved**, a **Rate Periods** tab will appear. Select it and select **Create New Record** from the toolbar or input an **End Date** into an existing **Rate Period** and **Create New Record**.





4. Enter the relevant information and select **Save** from the toolbar.

🖕 Caredirector 🎧 Home 🖰 Workplace 🗸 🍪 Settings 🗸		🔍 🖳 🛠 🖸 🌅 CareDirectorTest
- B Service Provided Rate Period: New		0
Details		
Ceneral 1		
Service Provided*	Responsible Team*	
Service Provided * Test Provider \SDS - Managed Account \Home Care \\\Spot	Responsible Team* Q CareDirectorTest	×Q
		× Q
Test Provider \SDS - Managed Account \ Home Care \\\Spot	Q CareDirectorTest	× Q
Test Provider \SDS - Managed Account \ Home Care \\\Spot Rate Unit*	CareDirectorTest Approval Status*	

5. A new tab called **Rate Schedules** will appear. Select the tab and select **Create New Record** from the toolbar.

Caredirector 🞧 Home 🗂 Workplace 🗸 🕸 Settings 🗸	€	8	$\Diamond$	3	Car	reDirectorTest
Service Provided Rate Period: Test Provider \ Test Provider \ SDS - Managed Account \ Home Care \ \ Spot \ Per Week Pro Rata \ 11 Oct 2022						?
Menu V Details Rate Schedules						
Relate cords V						QB
Service Provide Rate Rate Bank Holid Rate Per Unit Time Band Start Time Band End Monday Tuesday Wednesda	y	Tł	nursda	ау	Frida	зу



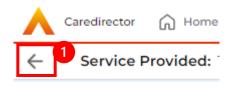
Image: A state     Imag	0 - 0



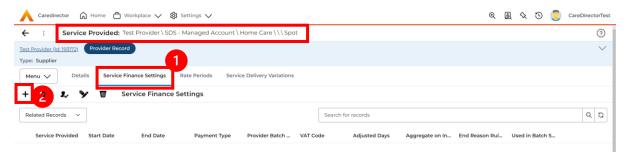
 Enter the appropriate Rate (you do not have to select days when the Rate Unit is Per Week Pro Rata). Select Save and Return to Previous Page on the toolbar.

A Caredirector 🛱 Home 🖻 Workplace 🗸 🕸 Settings 🗸	€	3	$\Diamond$	Έ	0	CareDirectorTest
← B Service Provided Rate Schedule: New						?
Details 2						
General						
Service Provided Rate Period * Responsible Team *						
Test Provider \ Test Provider \ SDS - Managed Account \ Home Care \ \\ Spot \ Per Week Pro Rata \ 11 O						XQ
Rate* Service Provided*						
Test Provider \SDS - Managed Account \Home Care \\\Spot						Q
Notes						
Notes						

7. Select Back on the toolbar to return to Service Provided.



8. Under Service Provided select the Service Finance Settings tab and Create New Record from the toolbar.





9. Enter the relevant information and when completed, select **Save and Return to Previous Page.** 

🔨 Caredin 2 🛱 Home 📥 Workplace 🗸 🏟 Settings 🗸		ତ 🛃 <	रे 🗓 🏮 CareDirectorTest
← ■ <table-cell> Service Finance Setting: New</table-cell>			0
Details			
<b>—1</b>			ĺ
General			
Service Provided*		Responsible Team*	
Test Provider \ SDS - Managed Account \ Home Care \ \ \ Spot	Q	CareDirectorTest	XQ
Start Date*		End Date	
	<b>m</b>		66
Payment Type*		Provider Batch Grouping *	
	Q		Q
VAT Code*		Adjusted Days*	
	Q		
Charge Using Number of Carers?		End Reason Rules Apply*	
O Yes		Yes	
No		○ No	
Used in Batch Setup*		VAT apply to Charging?*	
O Yes		O Yes	
® No		® No	
Notes			
Notes			

10. Select **Rate Periods.** The **System View** can be changed to show only **Pending Rate Periods** or **Approved Rate Periods**. Select **Pending Rate Periods** this will show records that need to be changed the status of.

	3	0	CareDirectorTest
type: Supplier  Type: Supplier			?
+ I Service Provided Rate Periods  Pending Rate Periods  System Views Approved Rate Periods Using State Periods  Search for records  Search for re			$\sim$
System Views Approved Rate Periods UStatus Statut Data End Data Canacity Canacity Can Ba Service Registed			
Approved Rate Periods			0 2
Pending Rate Periods Related Records 10 11/10/2022 No Test Provider \ SDS - Managed Accou			



#### 11. Select the **Pending Rate Period** from the list.

Caredirector 🏠 Home 🛱 Workplace 🗸 🕸 Settings 🗸	€	<u>e</u>	1 🛇	٩	CareDirectorTest
Service Provided: Test Provider \SDS - Managed Account \ Home Care \\\Spot					(?)
Test Provider (let: 193772) Provider Record Type: Supplier					$\sim$
Menu         Details         Service Finance Settings         Rate Periods         Service Delivery Variations           +         II         2         Y         II         Service Provided Rate Periods					
Pending Rate Periods v Search for records					a 5 3
Rate Unit Approval Status Start Date End Date Capacity Capacity Can Be Service Provided					
Per Week Pro Ra Pending 11/10/2022 No Test Provider \ SDS - Managed Accou					

12. Change the **Approval Status** from the **Pending** to **Approved.** Select **Save and Return to Previous Page** from the toolbar.

Caredirector 💭 Home 📥 Workplace 🗸 🕸 Settings 🗸				Q L & O (	CareDirectorTest
← ■ 🗟 2 🗑 : Service Provided Rate Period: Test Prov	vider \ Test	Prov	vide	r \ SDS - Managed Account \ Home Care \ \ \ Spot \ Per Week Pro Rata \ 11 Oct 2022	2 ⑦
Menu V Details Rate Schedules					
General					
Service Provided *				Responsible Team*	
Test Provider \SDS - Managed Account \ Home Care \\\Spot		Q		CareDirectorTest	
Rate Unit*		_		Approval Status*	
Per Week Pro Rata	×	Q		Pending	~
Start Date*		_		Approved Cancelled	
11/10/2022		Ê		Pending	
CREATED BY				MODIFIED BY	
Scott Simpson				Scott Simpson	
CREATED ON 11/10/2022 15:27:43				MODIFIED ON 11/10/2022 15:27:43	
ACTIVE					
Yes					

13. Your **Provider** is now able to be used in **Service Provisions**. A new **Service Provided** record will need setting up for each **Band** relevant to that **Provider**.



#### How to see Provider Service Provisions

1. Locate a **Provider** and select **Service Provisions** from the tabs.

est Pro		Provider: Test P								?
	ovider (Id: 19	Provider	Record							$\sim$
/pe: S	Supplier			_						
Men	iu 🗸	Timeline Su	ummary De	tails Service P	rovisions Services	Provided Suspe	nsions Service I	Delivery Variations	Finance Transactions	
×⊞	<b>\$</b>	<b>9</b> 6 :	Service Pro	ovisions						
	·T ·									
Relat	ted Records	5	~			Search for re-	cords			0.5
Ŀ	ld ≣t	Person	Id [Person]	Status	Planned Start D	Planned End Da	Actual Start Date	Actual End Date	Service Element 1	
2	220075	Test Tester	444265	Ready for Autho			20/09/2022		SDS - Managed Account	
2	220072	Test Tester	444265	Draft			12/09/2022		SDS - Managed Account	
2	220071	Test Tester	444265	Authorised			14/09/2022		SDS - Managed Account	

2. This will show information based around the **Service Provisions** that are undergoing under this **Provider**. Scroll across this page to see information based on the headings. Select a **Service Provision** to see more.

	Caredirect	or 🎧 Home 🕻	Workplace	$\sim$				Q. 🖳 🛇	۵ (	Care & Support C	ommissioning
←	: 1	Provider: Test Pro	ovider								?
	Provider (Id: 19 : Supplier	93172) Provider R	ecord								$\sim$
	enu 🗸			tails Service Pro	visions Services	Provided Suspe	ensions Service	Delivery Variation	ns Fi	nance Transactions	
Re	A X	<b>&amp; &amp;</b> :	Service Pro	ovisions		Search for re	cords				QG
	<u>Id</u> ≣1	Person	<u>ld [Person]</u>	<u>Status</u>	<u>Planned Start D</u>	Planned End Da	Actual Start Date	Actual End Da	ite <u>Ser</u>	vice Element 1	
	220075	Test Tester	444265	Ready for Autho			20/09/2022		SD	5 - Managed Account	
	220072	Test Tester	444265	Draft			12/09/2022		SD	5 - Managed Account	
	220071	Test Tester	444265	Authorised			14/09/2022		SD	5 - Managed Account	



#### How to see Provider Suspensions

1. Locate the relevant **Provider.** Once on the **Provider** screen, select the **Suspensions** tab.

Caredirector 🎧 Home 📥 Workplace 🗸 🕸 Settings 🗸 🔍	R 🛠 🖸 🄇	CareDirectorTrain
← : Provider: Croft Care Services		?
Croft Care Services (Id: 1) Provider Record		$\sim$
Type: Supplier	1	
Menu V Timeline Summary Details Service Provisions Services Provided	Suspensions	Service Delivery Va
+ 💷 🎗 🗑 Provider Suspensions		
Related Records		Q 23
Start Date End Date Suspend All Ser Suspension Rea Display		
NO RECORDS		
No results were found		
for this screen.		

2. This will show a list of all **Suspensions** occurred on the **Provider**.



#### How to add a Suspension on a Provider

1. Locate the relevant **Provider.** Once on the **Provider** screen, select the **Suspensions** tab. Once there, select the **Create New Record** on the toolbar.

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸 🔍 🕄 🌷	CareDirectorTrain
← : Provider: Croft Care Services	?
Croft Care Services (Id: 1) Provider Record	$\sim$
Type: Supplier	
Menu Timeline Summary Details Service Provisions Services Provided Suspensions S	Service Delivery Va
+ 💵 🎝 🗑 Provider Suspensions	
Related Records	QG
Start Date End Date Suspend All Ser Suspension Rea Display	
NO RECORDS	
No results were found	
for this screen.	

2. This will open the **Suspension** creation screen. Fill in the mandatory fields and select **Save** from the toolbar when done.

Provider Suspension: New     ?	Provider Suspension: New	Caredirector 🛱 Home 💾 Workplace 🗸 🛱 Settings 🗸			€	Ę	$\Diamond$	Ŀ	CareDirectorTr	ain
Type: Sup Details  Ceneral  Provider*  Coft Care Services  Start Date*  Suspension Reason*  Suspension Re	ype: Supp Details  Ceneral  Provider* Croft Care Services Croft Care Services CareDirectorTrain X Q Suspension Reason* Display* Display* Suspend All Services* Service Element 1* Yes								(	?
Details     Croneral     Provider*     Croft Care Services     Start Date*     Suspension Reason*     Suspend All Services*     Service Element 1*	Details     Ceneral   Provider*   Croft Care Services   Q   Start Date*   Care DirectorTrain   X   Q   Suspension Reason*   Display*   Suspend All Services*   Yes									$\checkmark$
Ceneral   Provider*   Croft Care Services   Q   Start Date*   Suspension Reason*   Display*   Suspend All Services*   Q   Suspend All Services*	Croneral   Provider*   Croft Care Services   Q   Start Date*   Care DirectorTrain   X   Q   Suspension Reason*   Display*   Suspend All Services*   Q   Yes									
Provider* Responsible Team*   Coft Care Services Q   Start Date* End Date   Suspension Reason* Display*   Q	Provider* Responsible Team*   Croft Care Services Q   Start Date* End Date   Suspension Reason* Display*   Q	Details								
Provider* Responsible Team*   Coft Care Services Q   Start Date* End Date   Suspension Reason* Display*   Q	Provider* Responsible Team*   Croft Care Services Q   Start Date* End Date   Suspension Reason* Display*   Q	Connect								
Croft Care Services Q   Start Date* End Date   Suspension Reason* Display*   Q Suspend All Services*   Suspend All Services* Service Element 1*   Q Q	Croft Care Services Q   CareDirectorTrain X   Start Date* End Date   Suspension Reason* Display*   Q ~   Suspend All Services* Service Element 1*   Q Q									
Start Date*   End Date   Suspension Reason*   Display*   Suspend All Services*   Suspend All Services*   Service Element 1*	Start Date* End Date   Suspension Reason* Display*   Q Vas   Service Element 1*   Q     Q     Q     Q     Q     Suspend All Services*     Service Element 1*     Q     P      P     P <td>Provider *</td> <td></td> <td>Responsible Team *</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Provider *		Responsible Team *						
Image: Suspension Reason*     Display*       Image: Suspend All Services*     Service Element 1*       O Yes     Image: Imag	Image: Constraint of the second se	Croft Care Services	Q	CareDirectorTrain					XQ	
Suspension Reason* Display*  Q Suspend All Services* Service Element 1*  Ves Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Suspension Reason* Display* C Q C C C C C C C C C C C C C C C C C C	Start Date*		End Date						
Q     ····································	Q     ····································		雦						Ê	
Suspend All Services* Service Element 1*	Suspend All Services* Service Element 1* O Yes Q	Suspension Reason*		Display*						
O Yes	○ Yes		Q						~	
~	~	Suspend All Services*		Service Element 1*						
No	No	O Yes							Q	
		No								



# **Overview of the Quality Assurance**

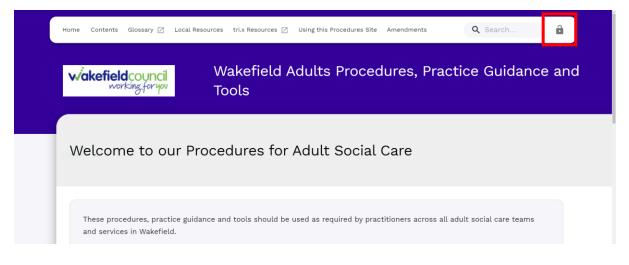
1. Locate the relevant **Provider.** Select **Menu**, **Quality Assurance** subcategory. Select the appropriate section.

Caredirector 🕥 Hon	ne 📋 Workplace 🗸	ôð Settings 🗸			C 🖳 🛠 🛈 🌅	CareDirectorTrai
- : Provider: Cr	roft Care Services					?
oft Care Services (Id: 1) pe: Supplier	vider Record					$\sim$
Menu 🔨 Timeline	Summary Details	Service Provisions	Services Provided	Suspensions	Service Delivery Variations	Finance Tra
Activities Related Items Commissioning Quality Assurance Other Information	Complaint & Feedback	Provider Quality Ratings				

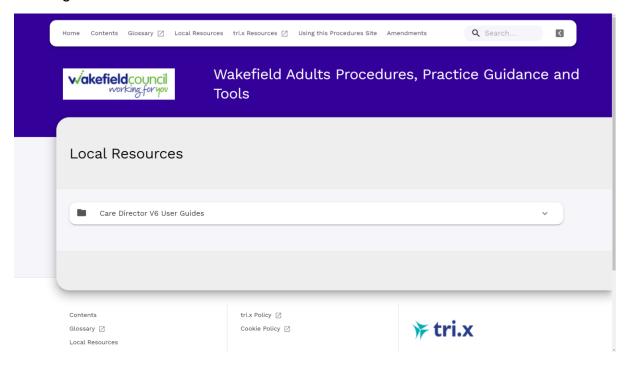


# **Further CareDirector Guidance**

- 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