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

Contents

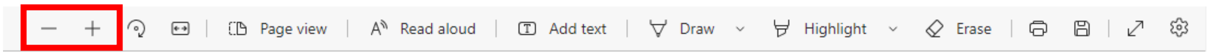
Guide Information

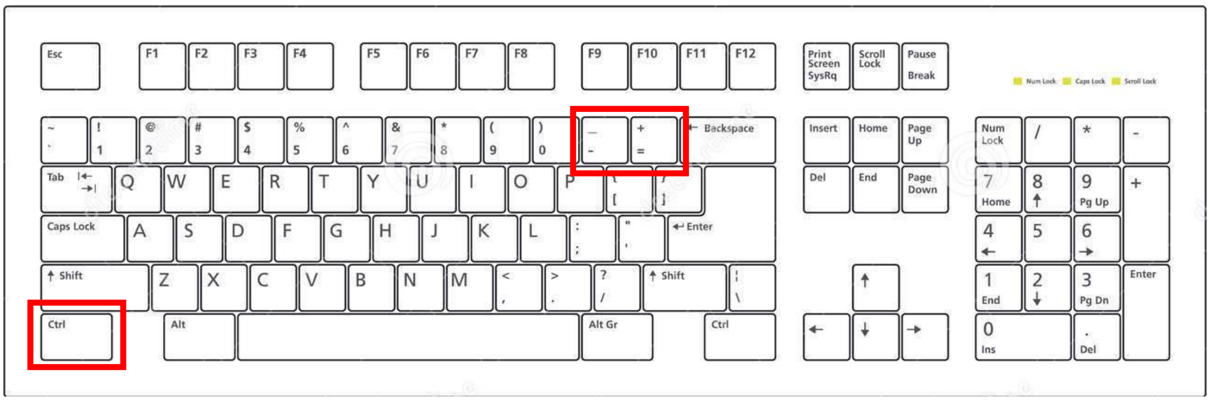
Before Live Access…

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

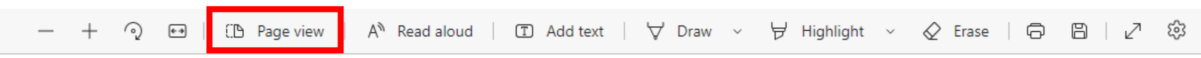
Guide Navigation

1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the **- +** icons on the toolbar alternatively, **Ctrl (Hold)** and **– (Press)** or **Ctrl (Hold)** and **+ (Press)** on your keyboard.

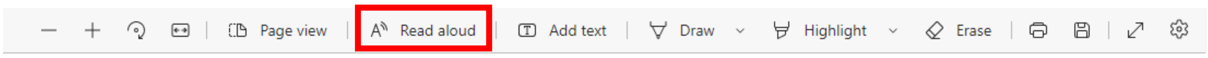




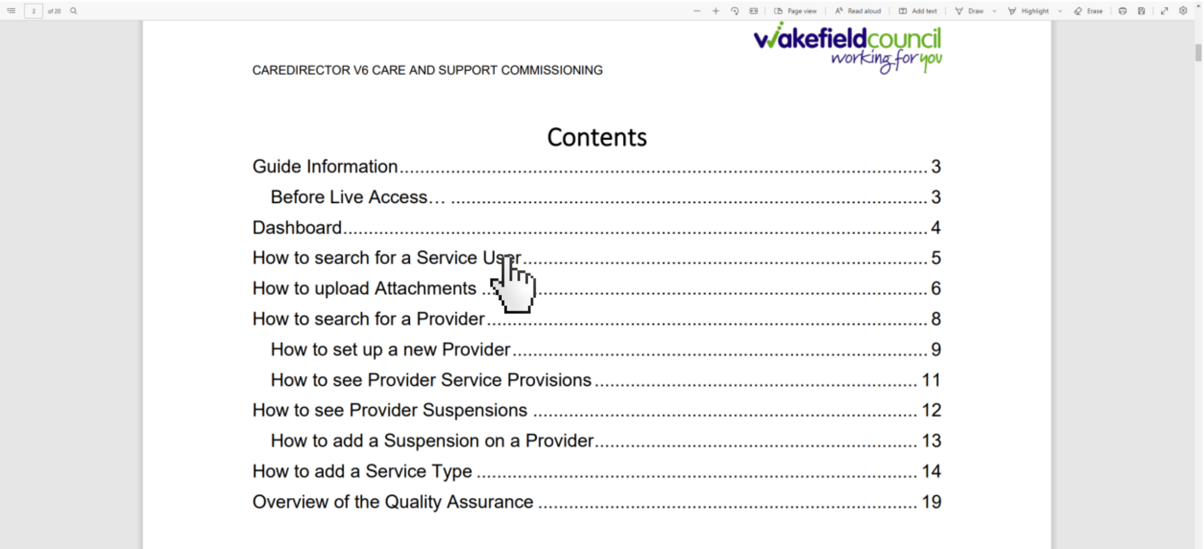
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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

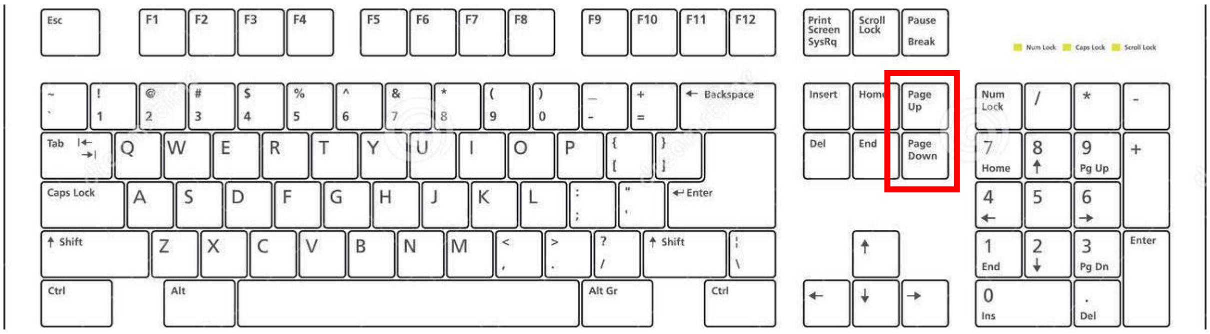


5. From the **Contents** page, select a **Heading** that you want to quickly "jump" to.

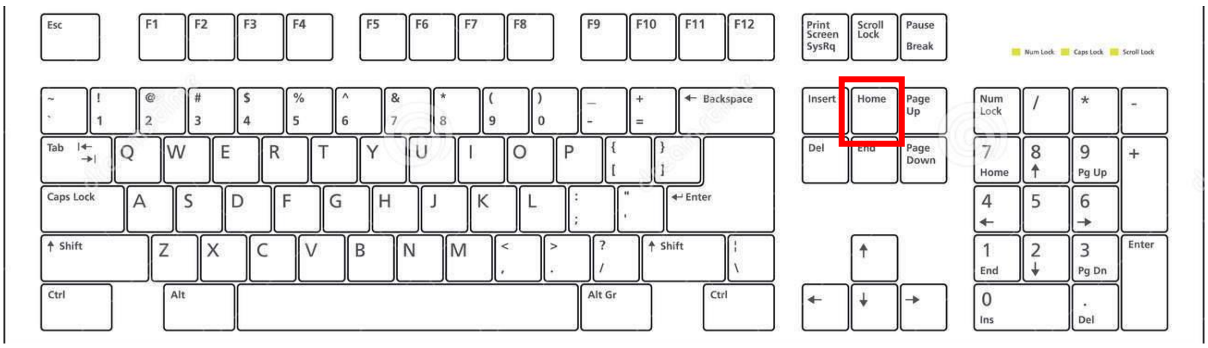

CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

Contents

6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to "jump" up and down a page.

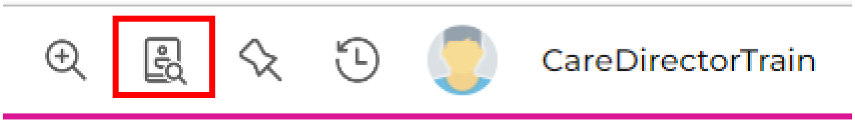


7. At any point, use the **Home** button on your keyboard to "jump" back to the first page.

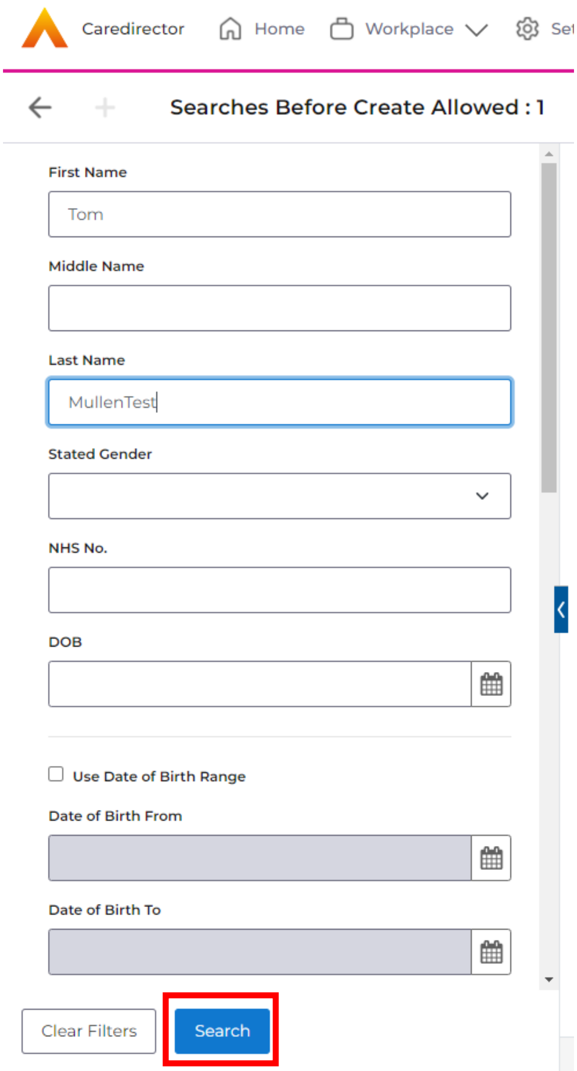


How to search for a Service User

1. Select the **Person Search** icon on the **Navigation Menu**



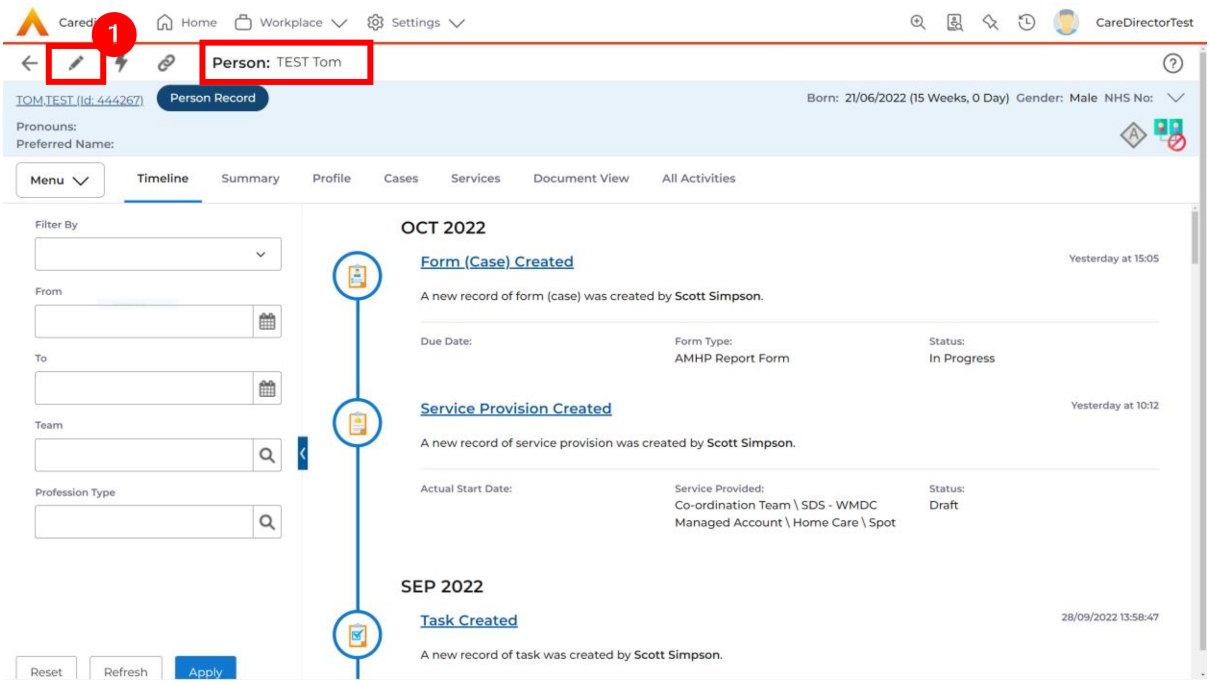
2. Enter their details provided. When finished, select **Search**.



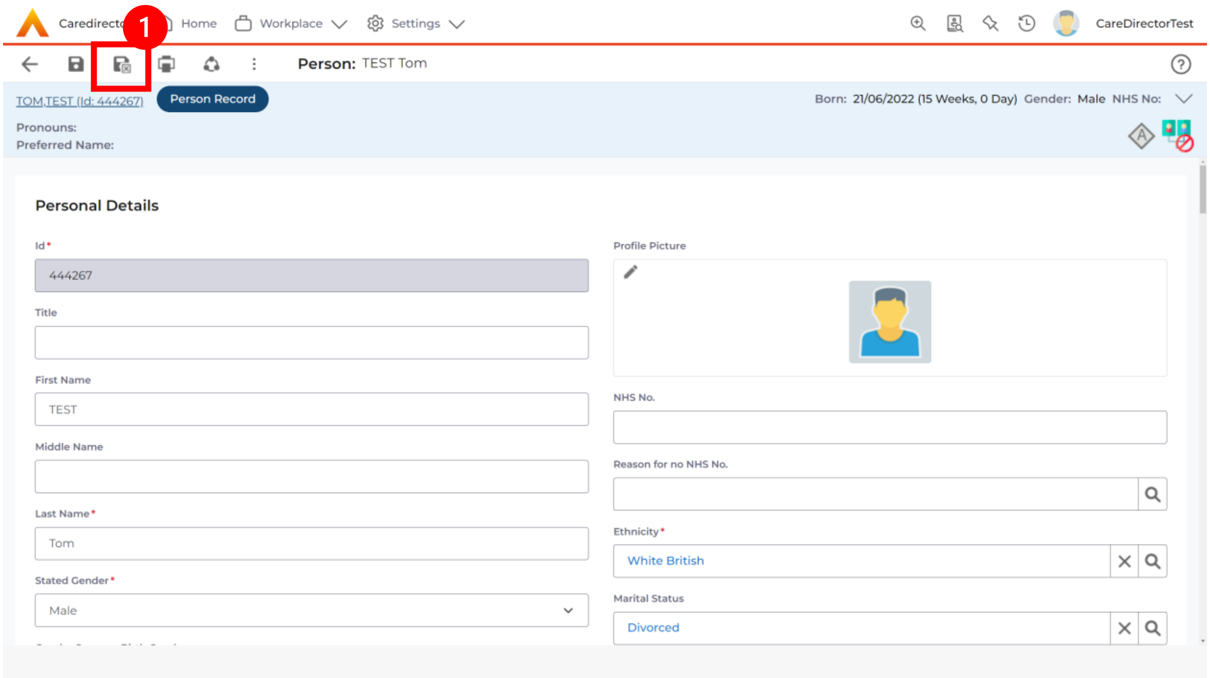
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

1. Select the **Person Record** that needs updating. Then select the **Edit** function from the toolbar (Pencil Icon).

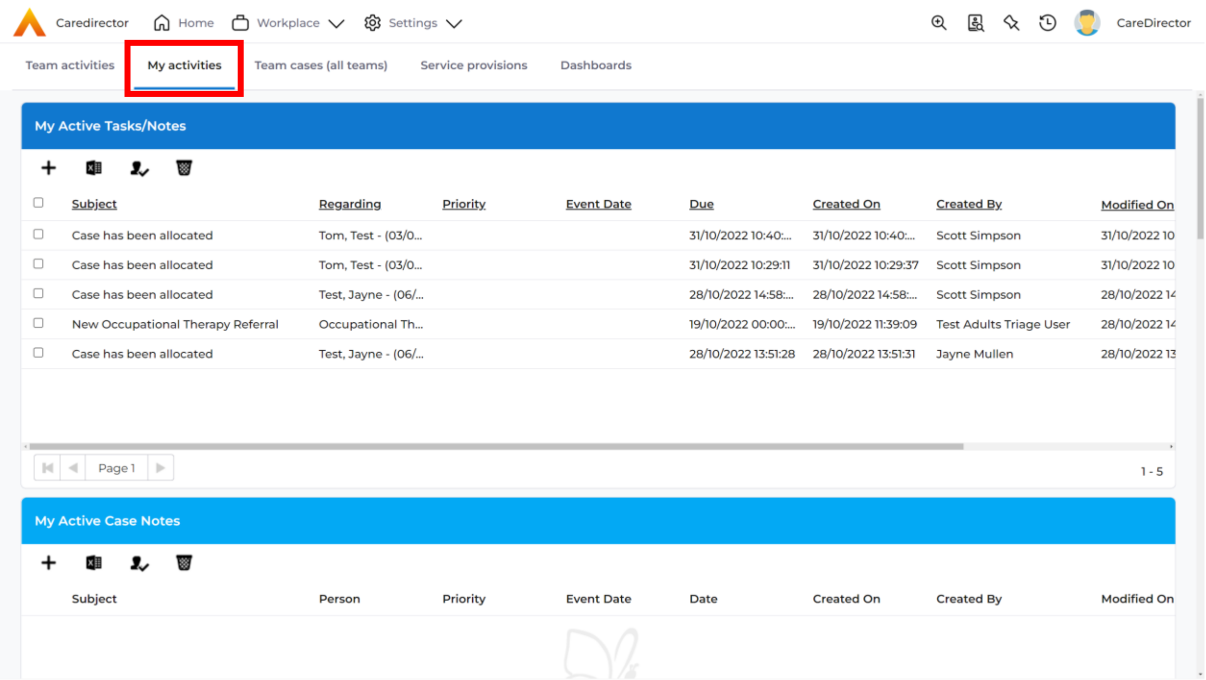


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

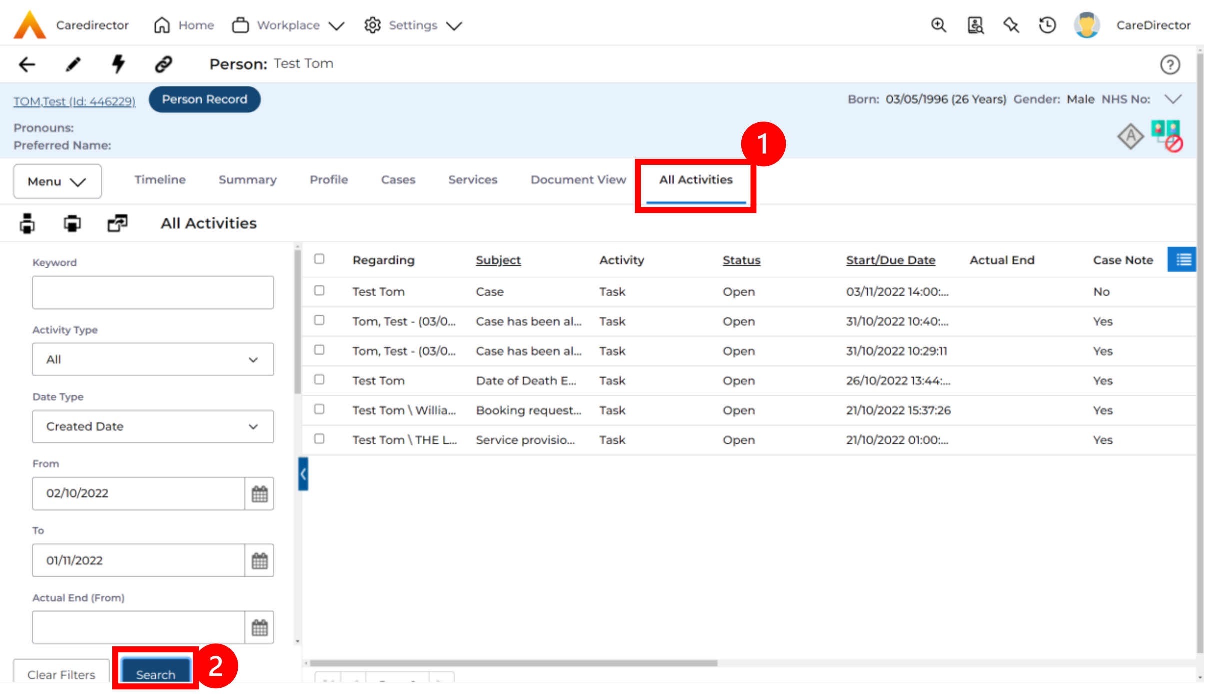


How to find Activities

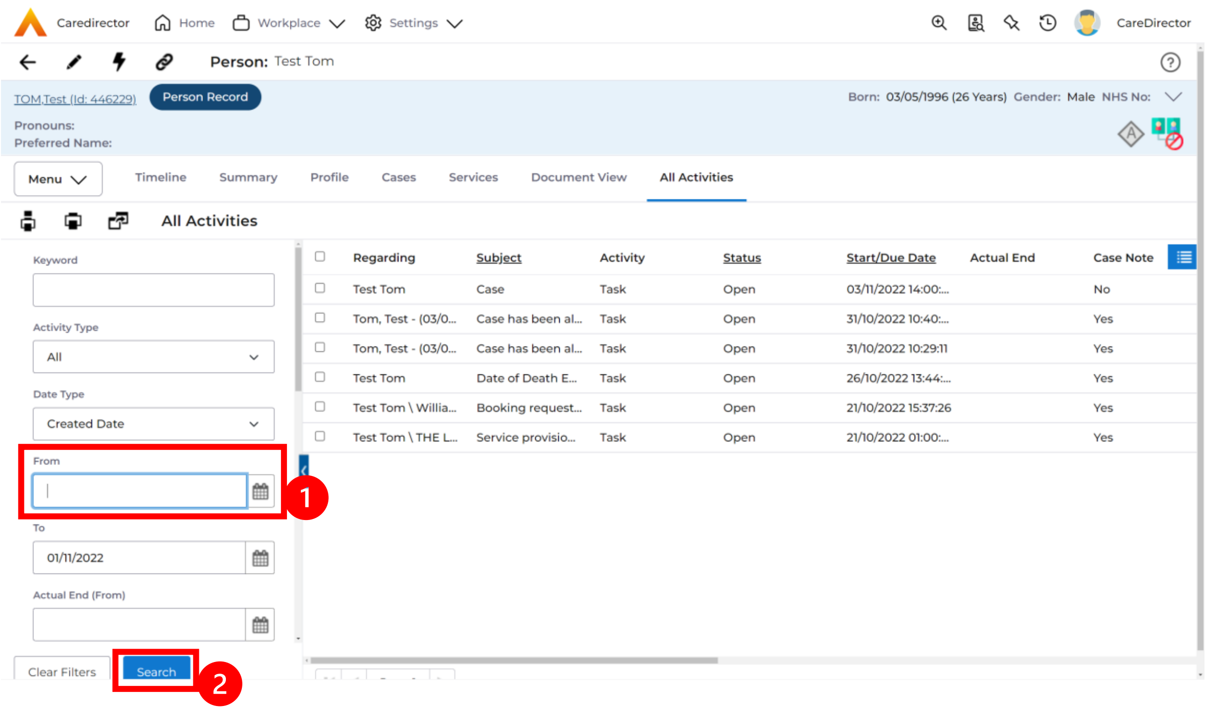
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



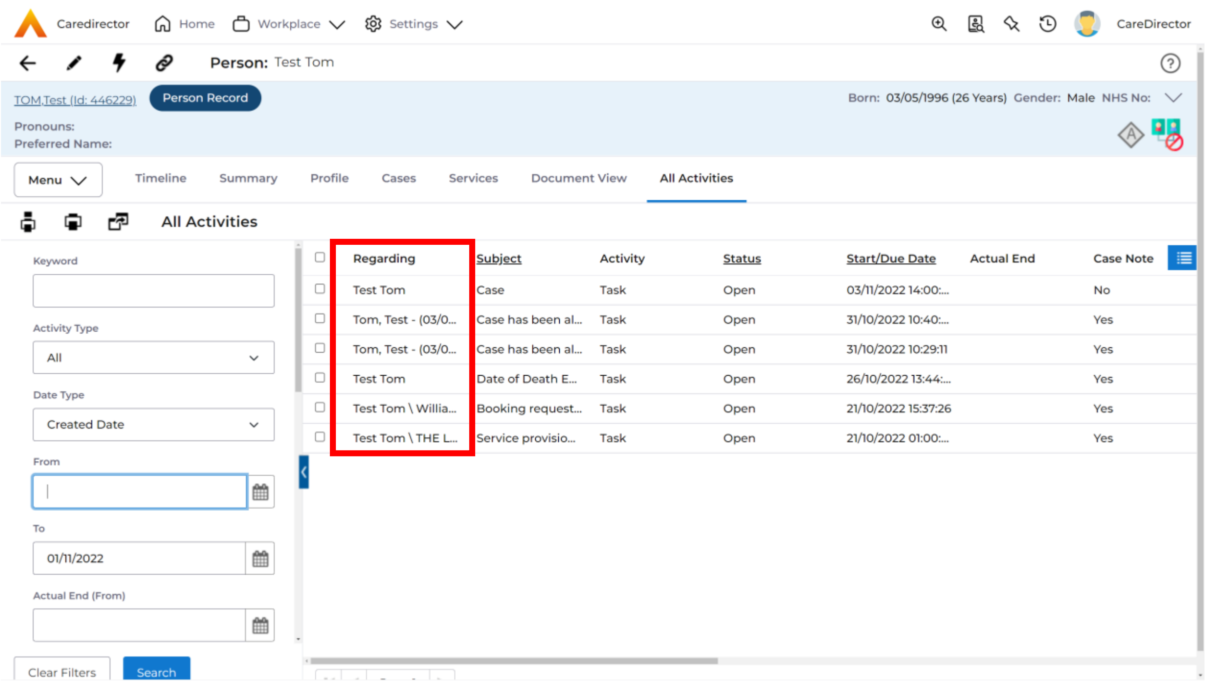
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



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.

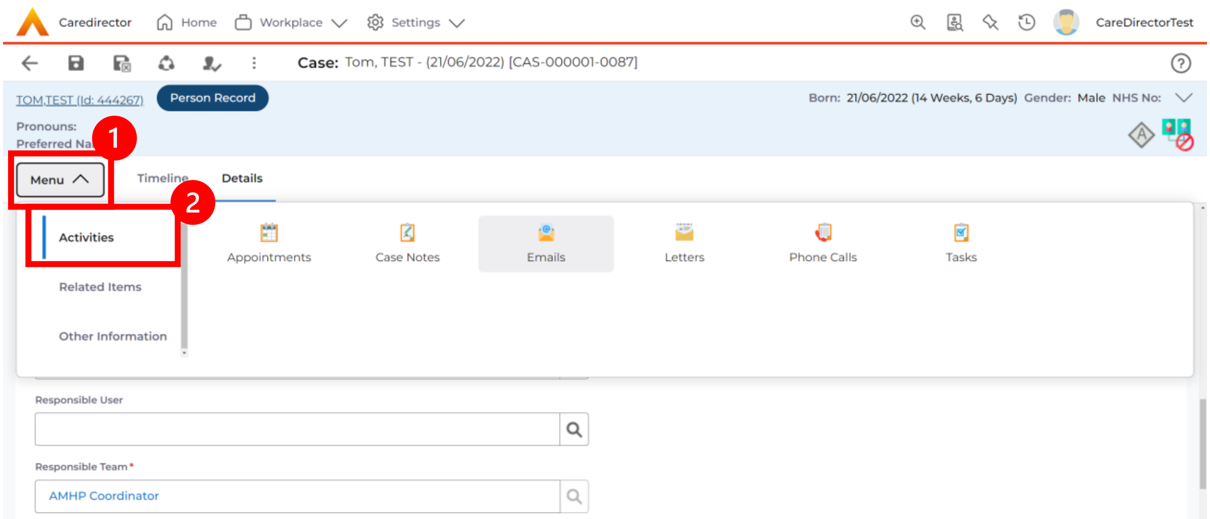


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

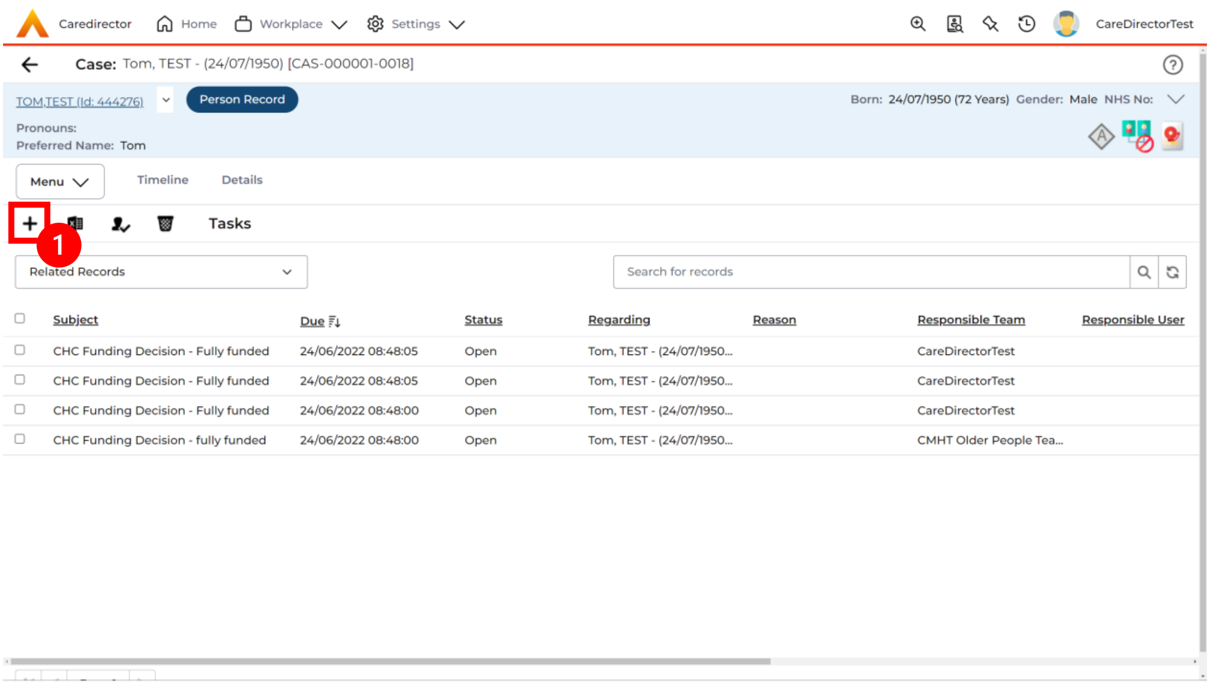


How to input an Activity

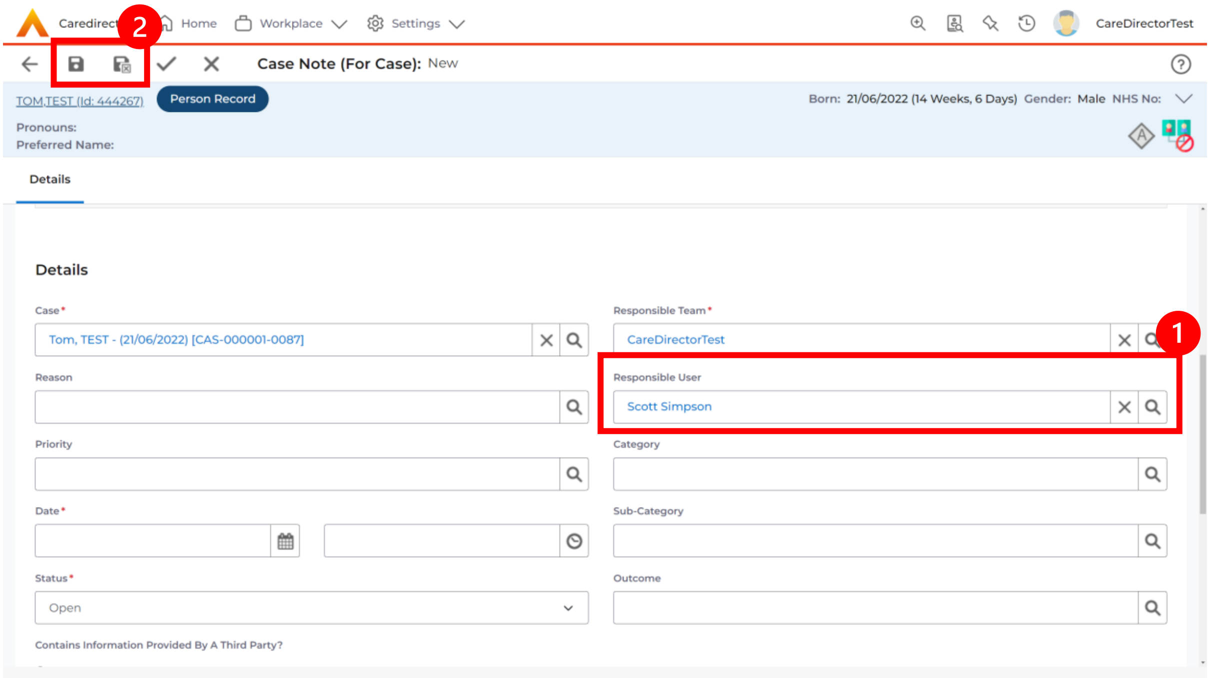
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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



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**.

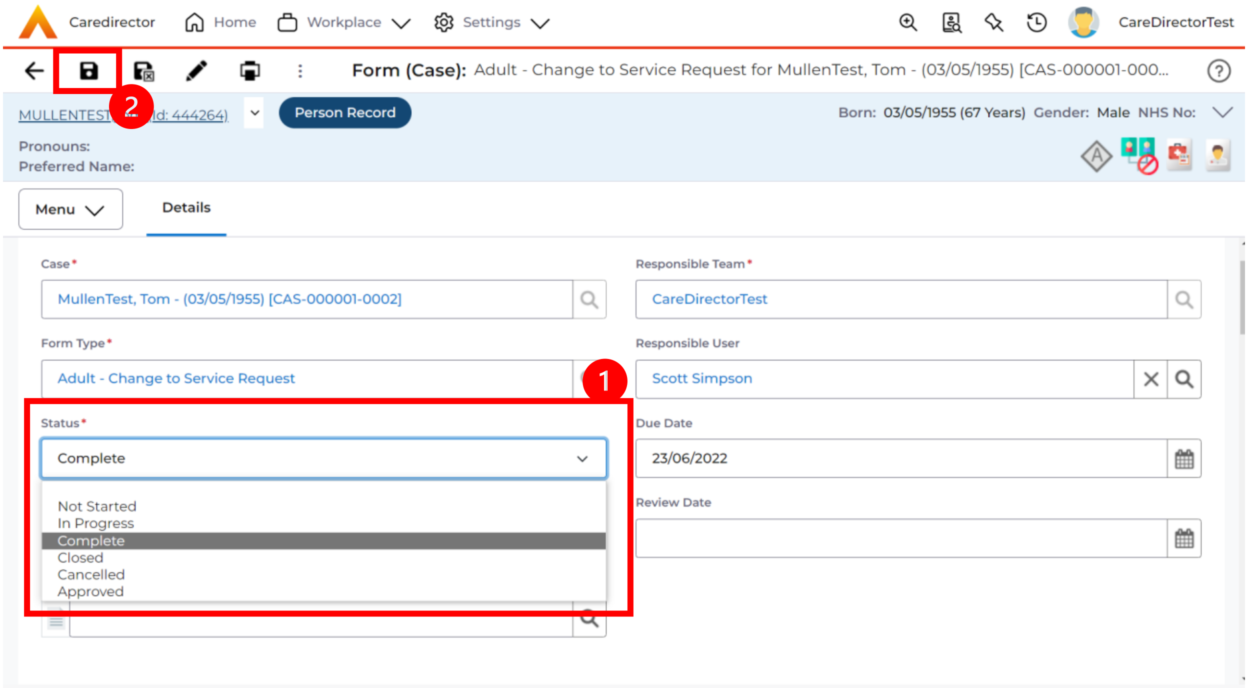


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

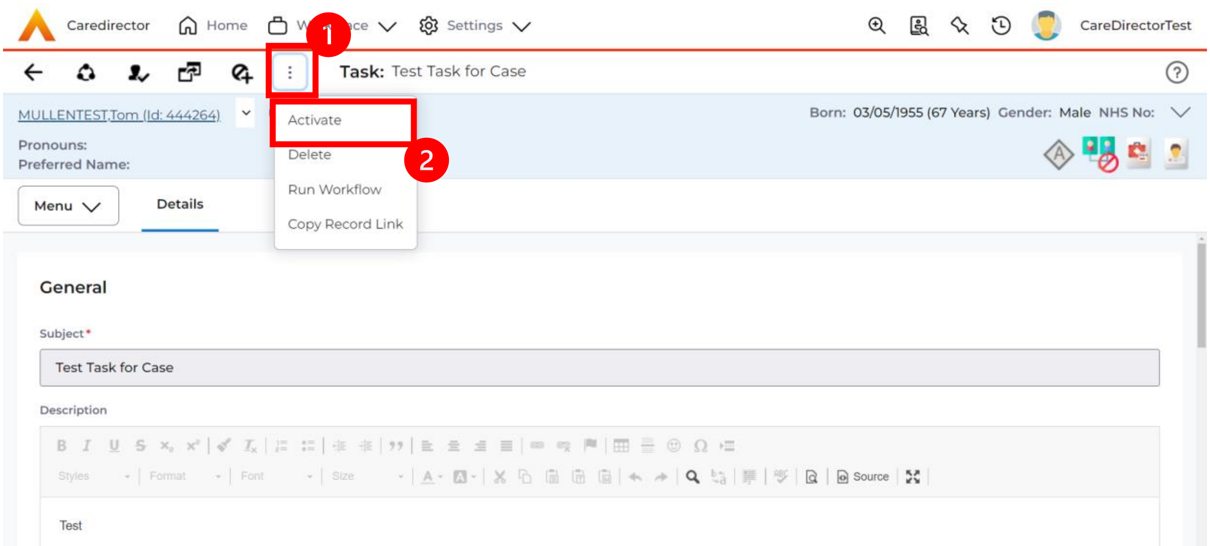
How to change status to Complete (Re-activate Activities)

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.**

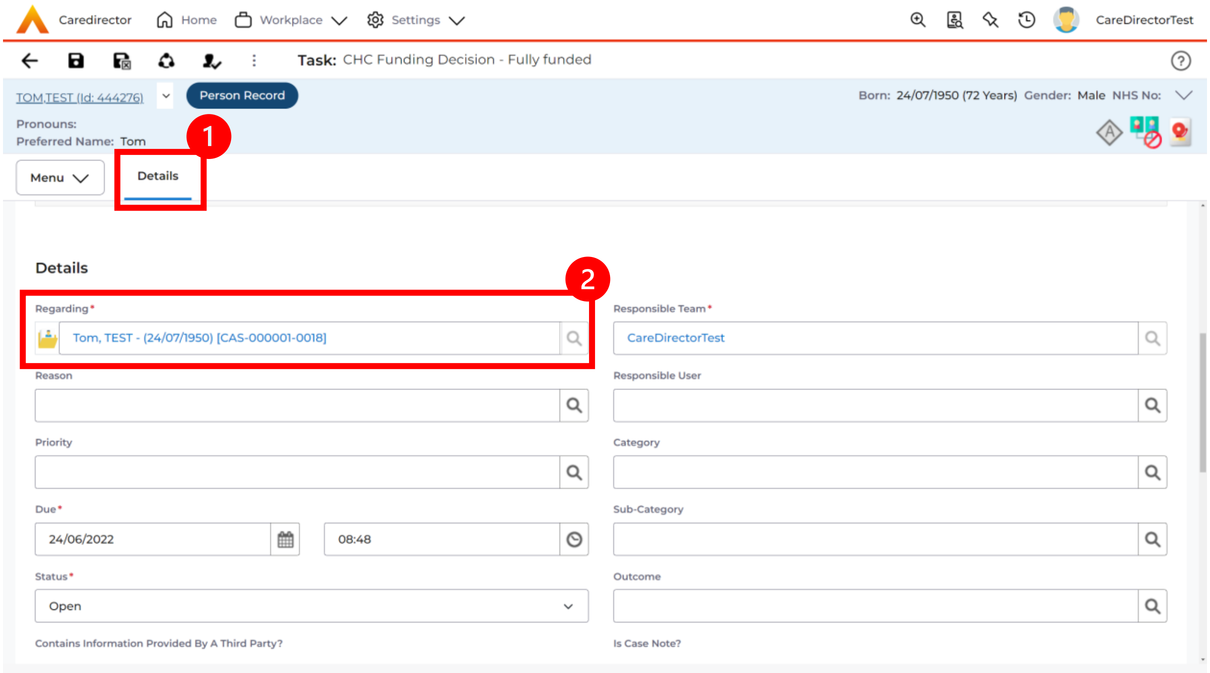


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

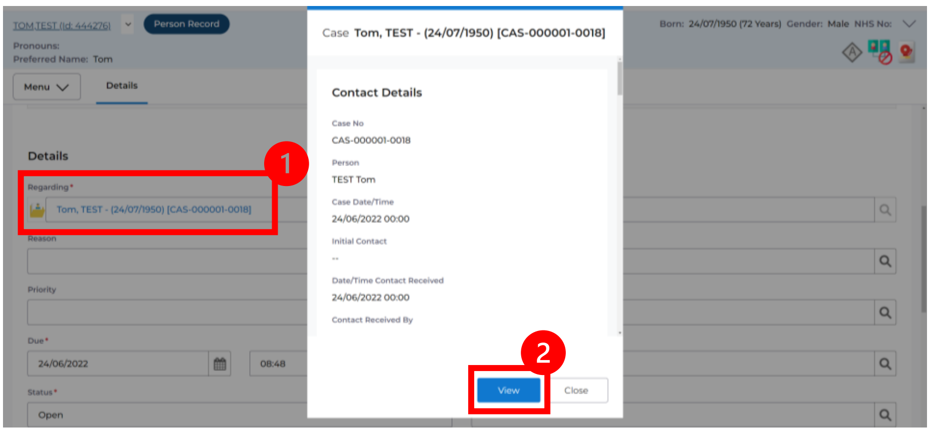
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.

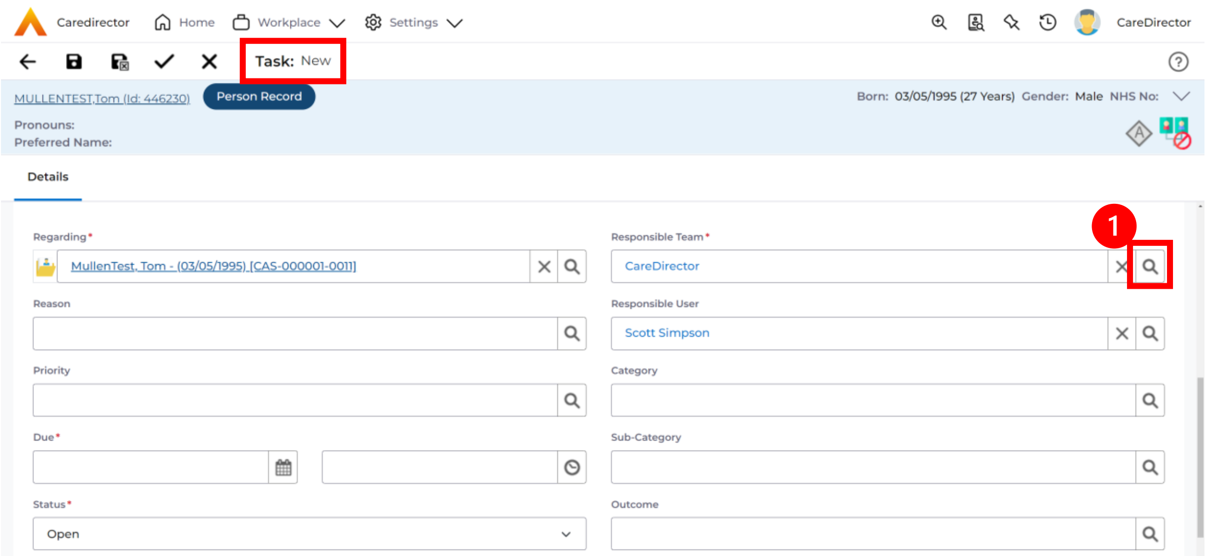
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

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.**

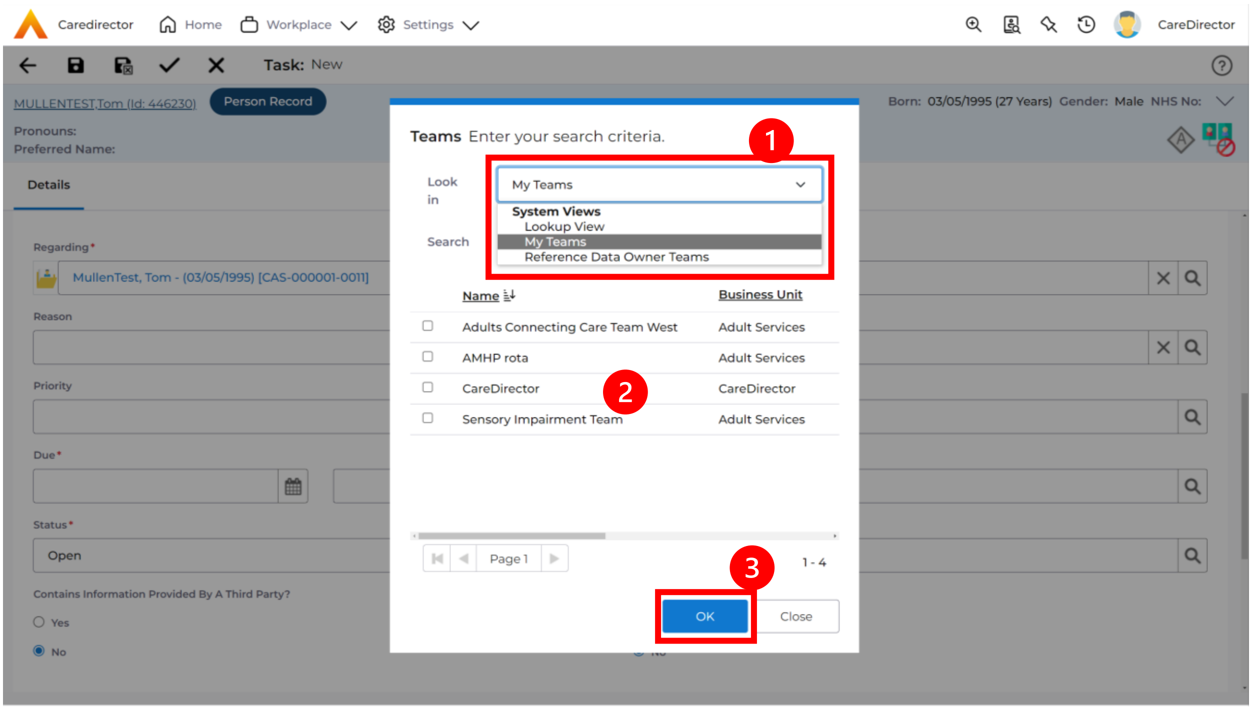


How to Allocate a new Activity to another team

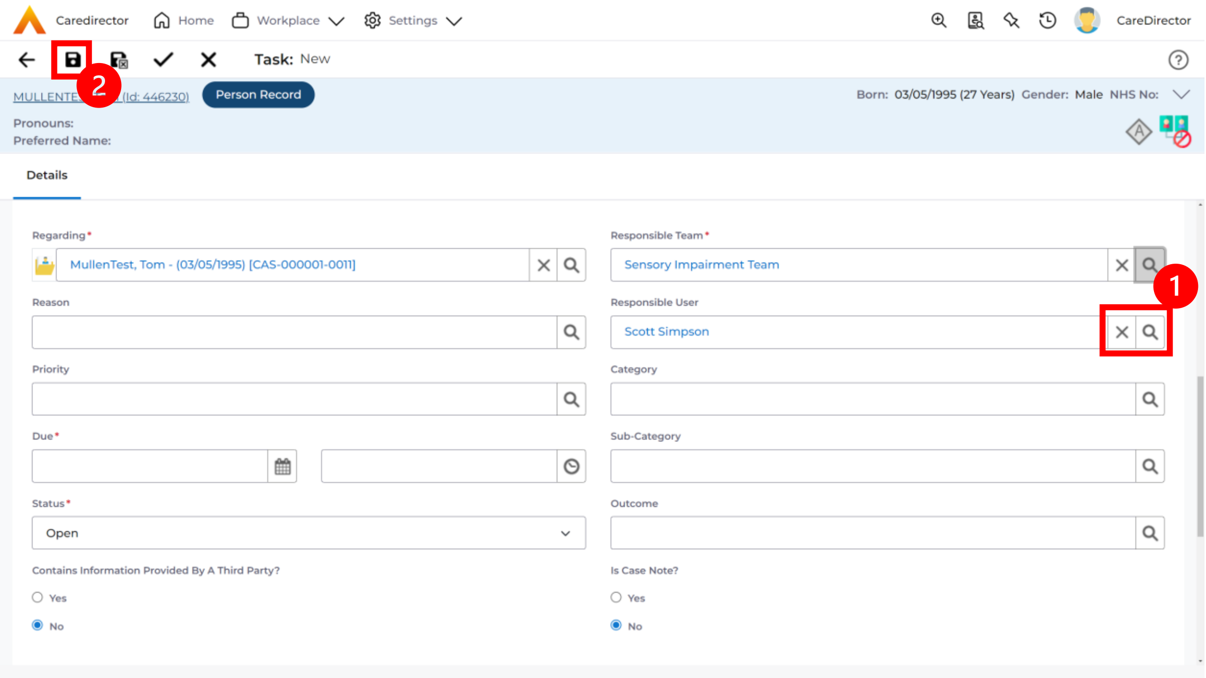
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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

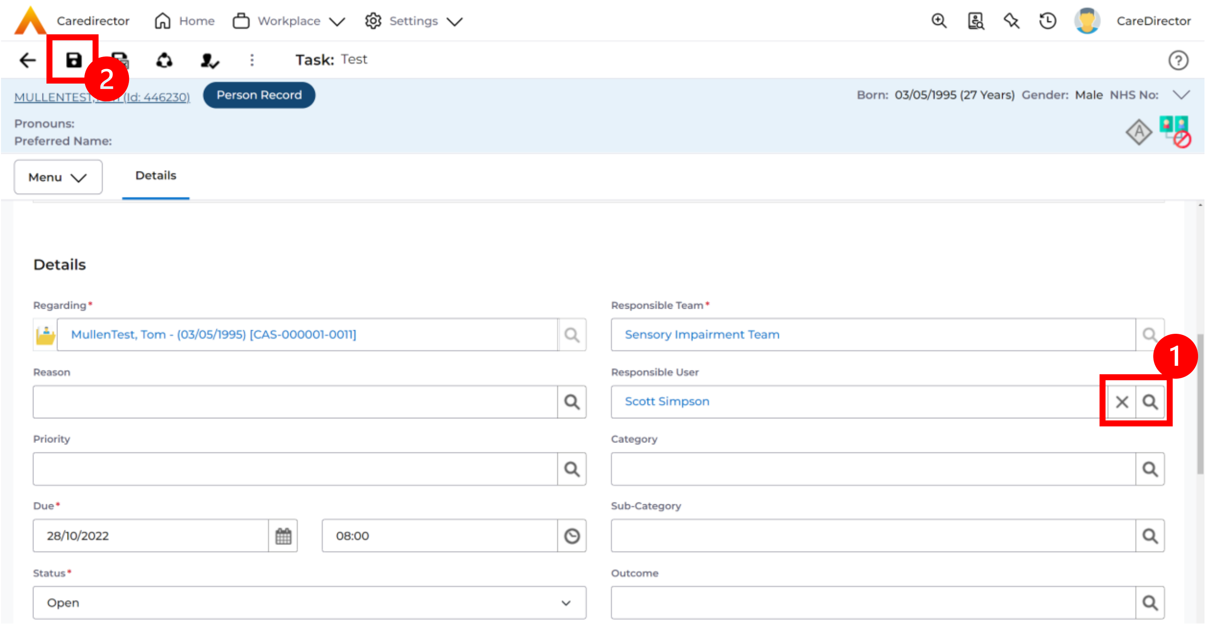


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

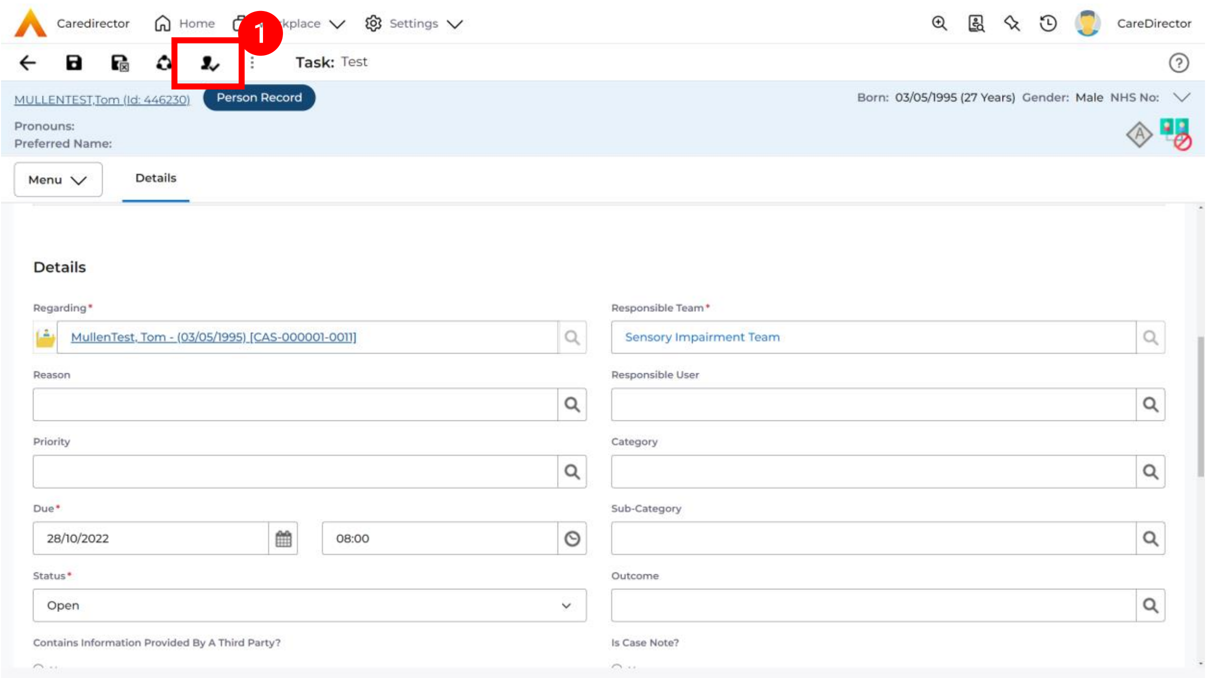


How to Allocate an existing Activity to another team

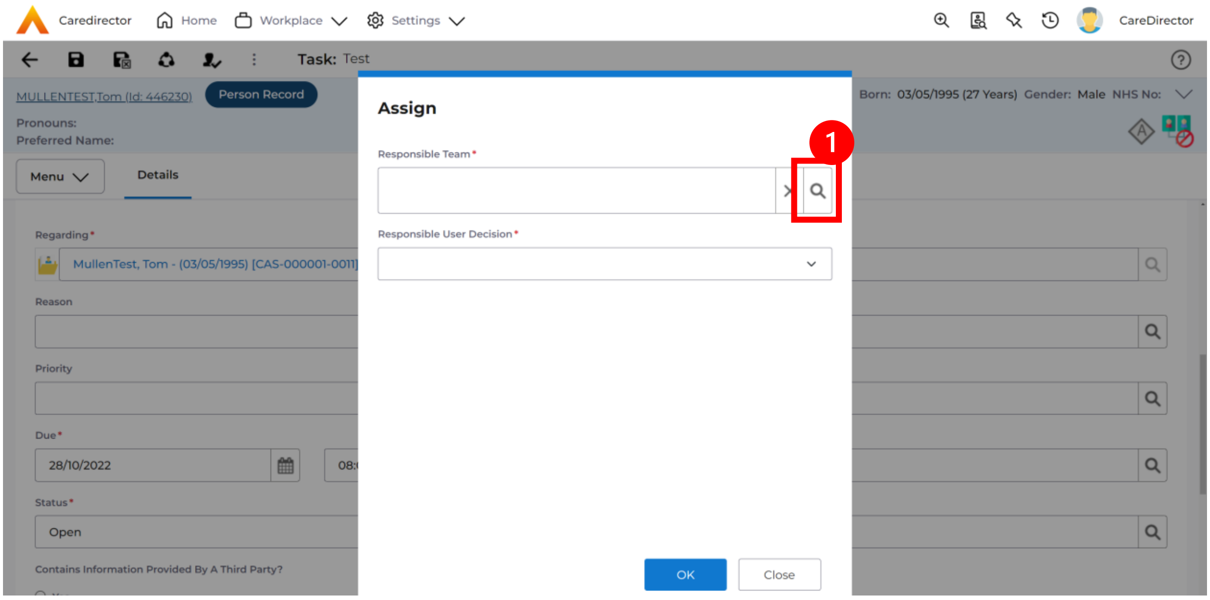
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



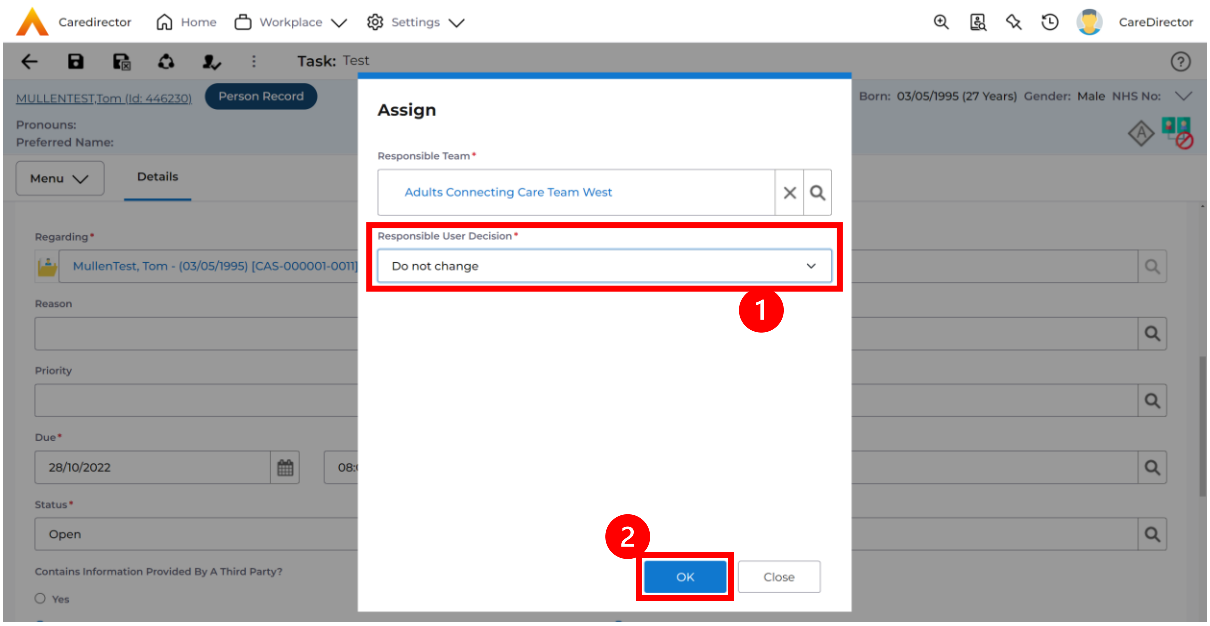
2. Next select **Assign this record to another team** from the toolbar.



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.



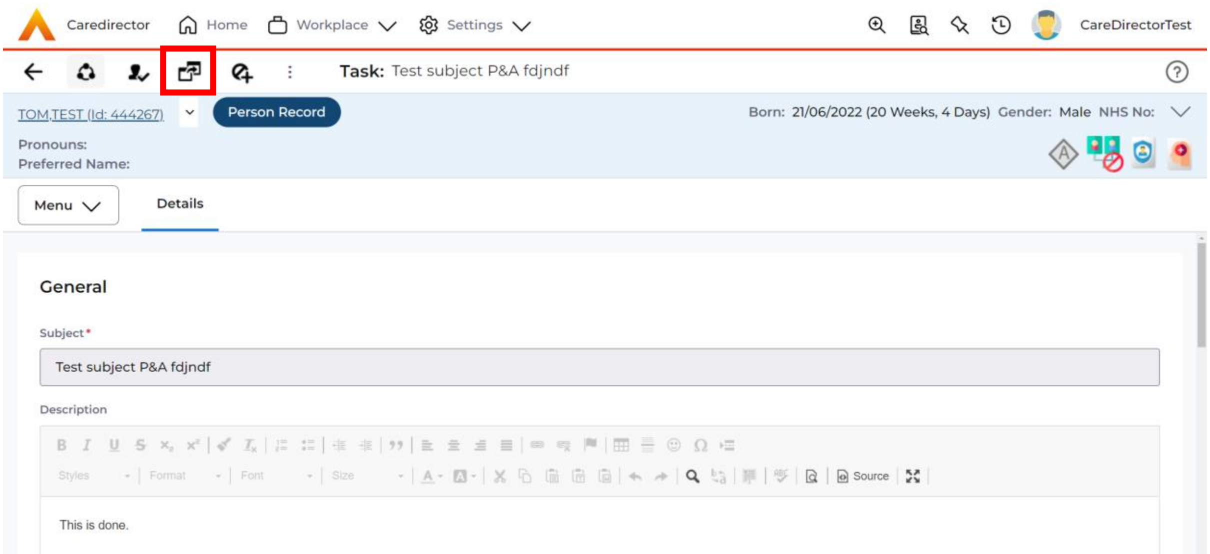
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



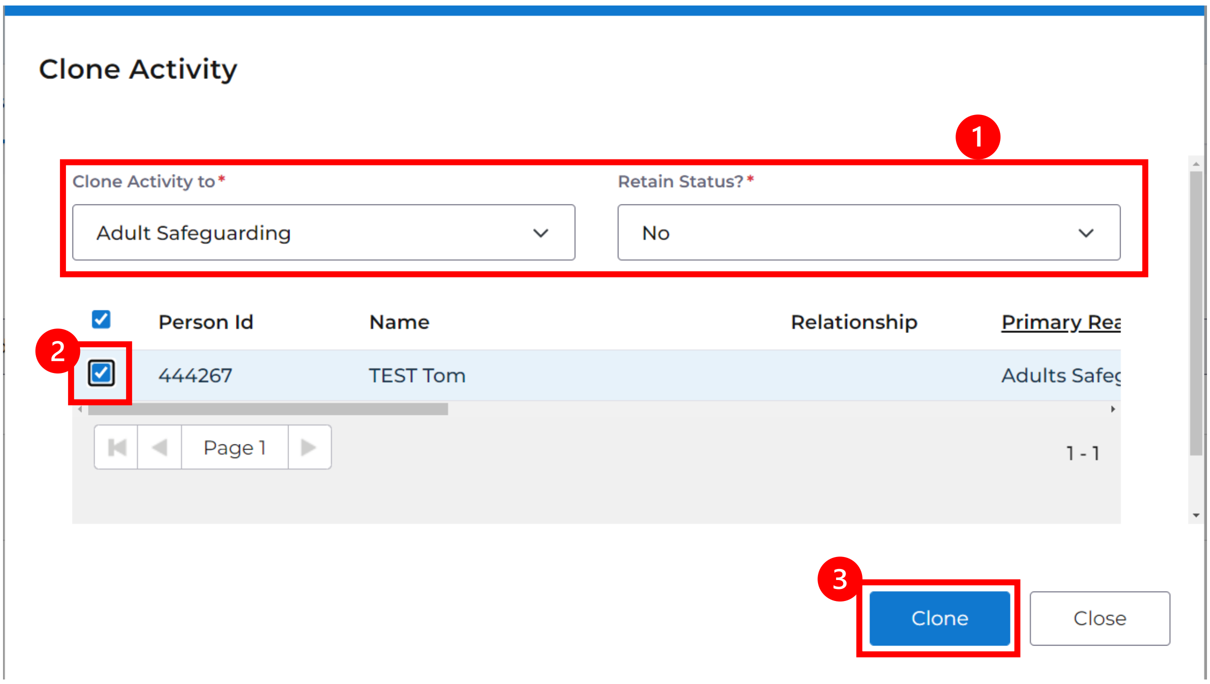
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

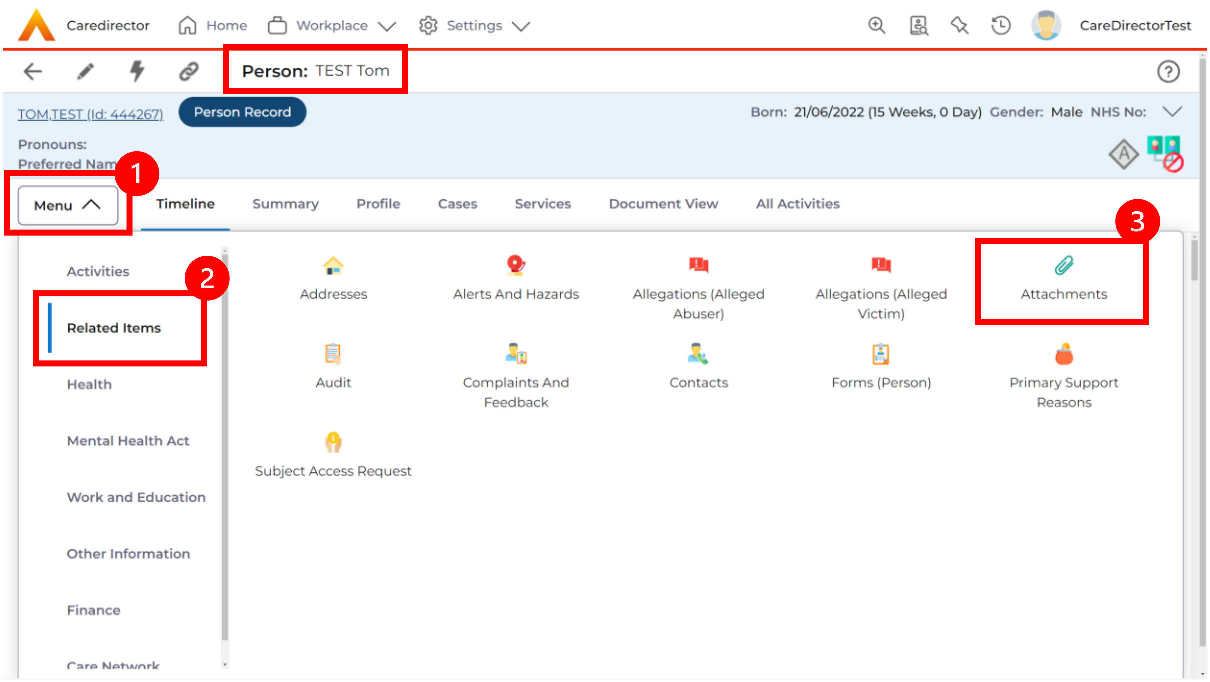


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

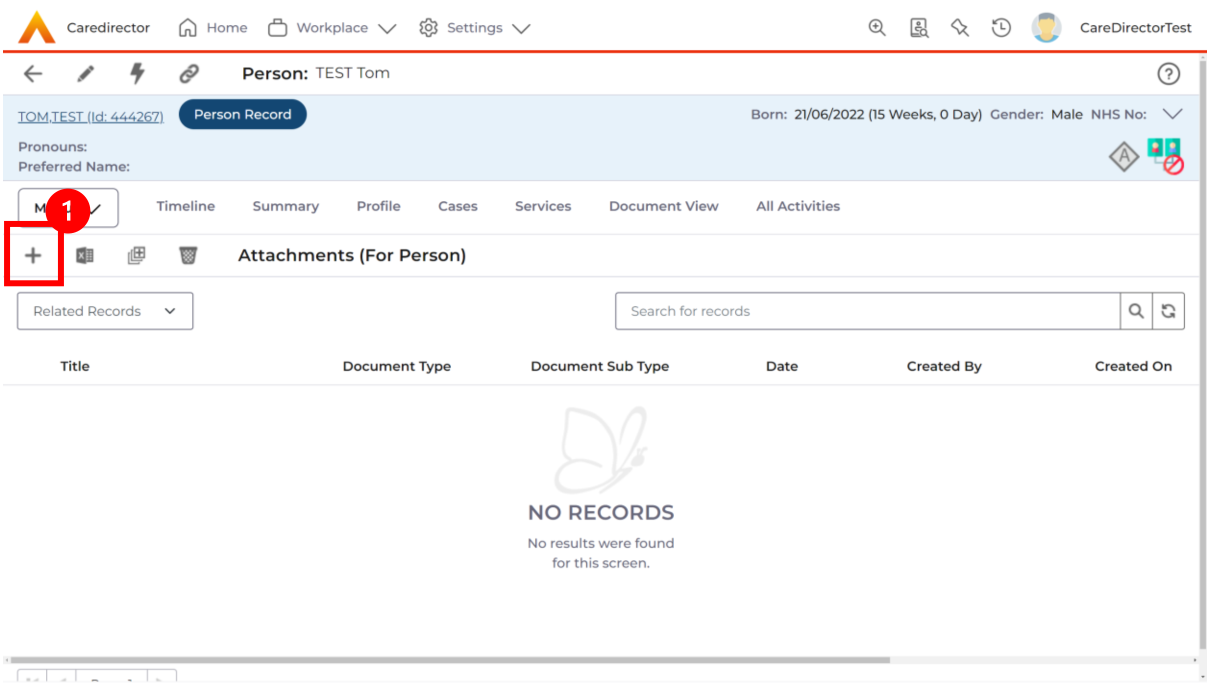


How to upload Attachments

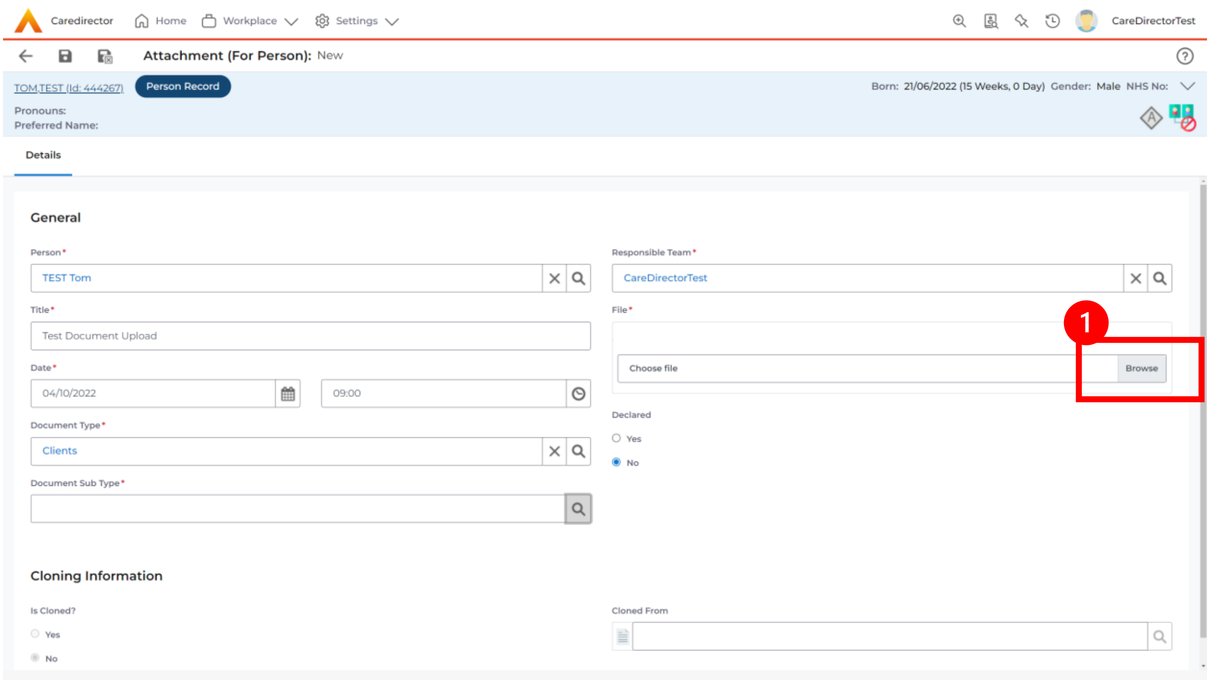
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



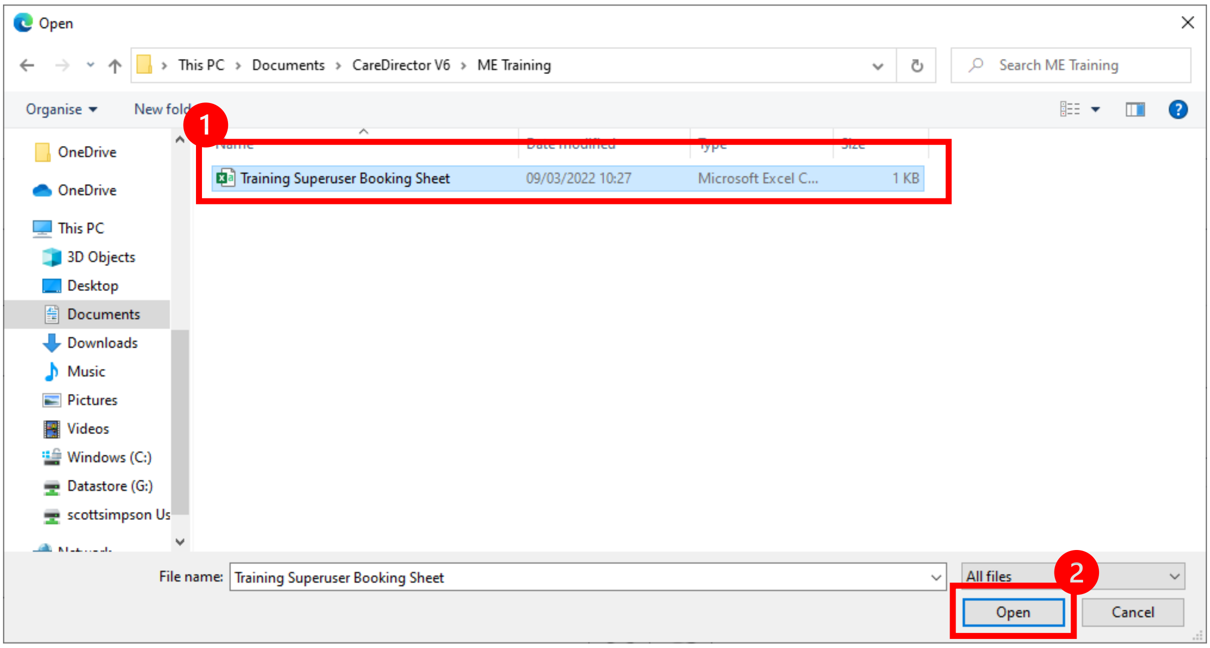
2. When opened, select the **Create New Record** from the toolbar.



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



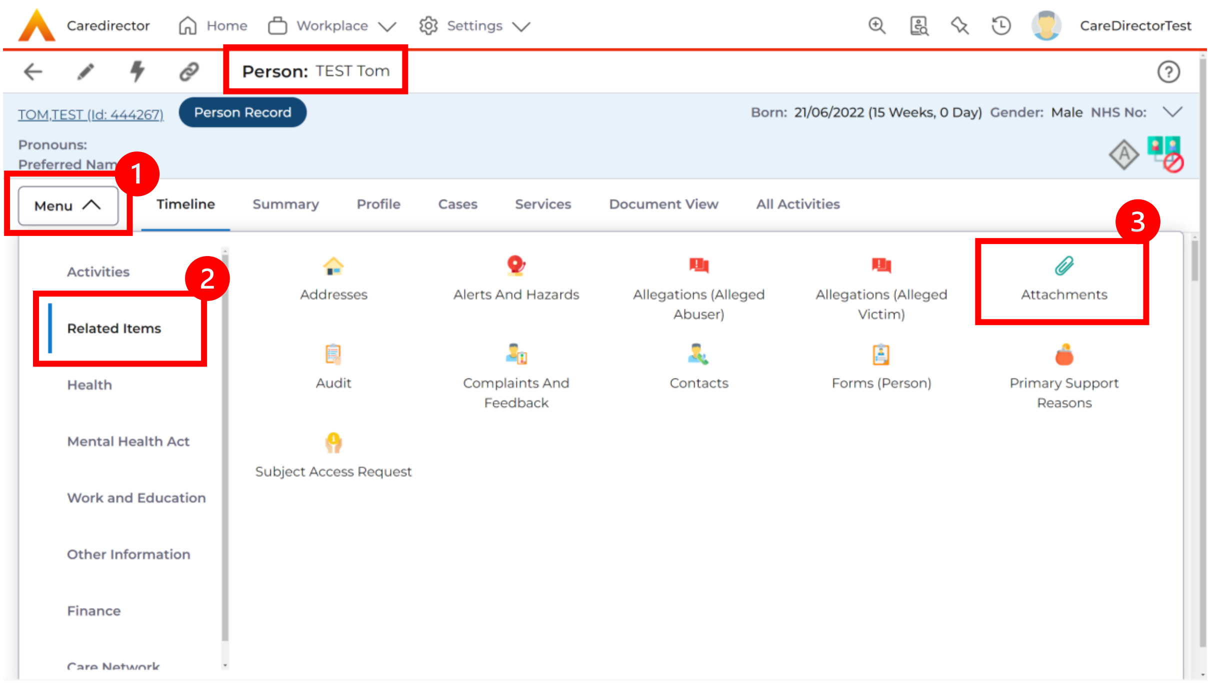
4. Select a **File** from your computer/ SharePoint and select **Open.**



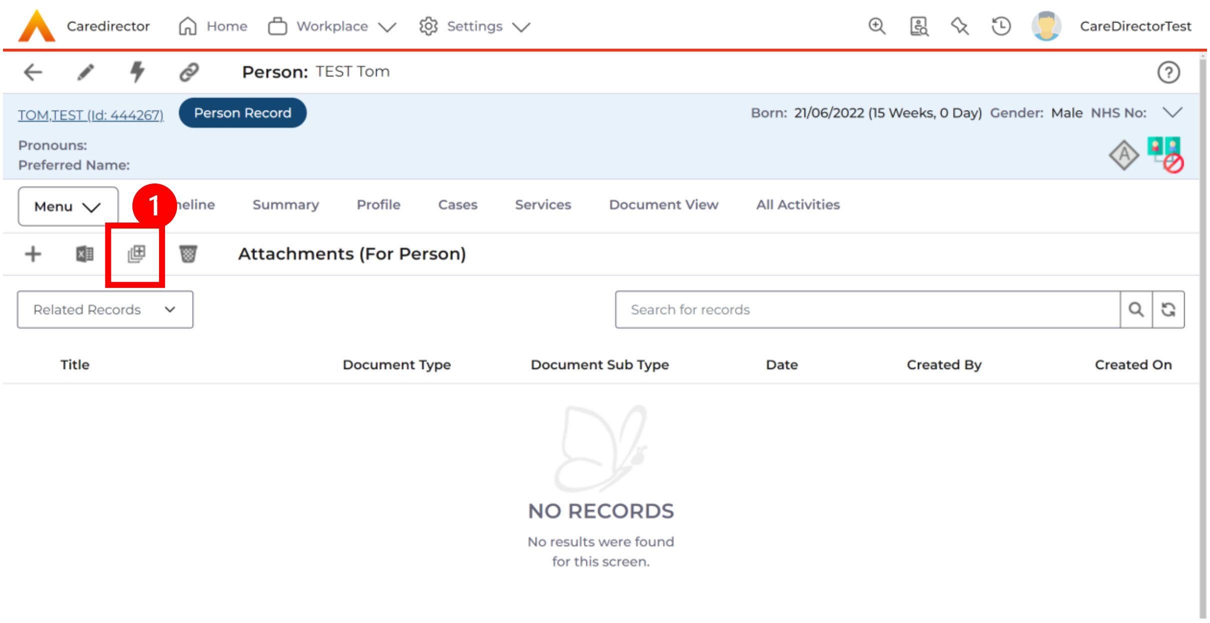
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

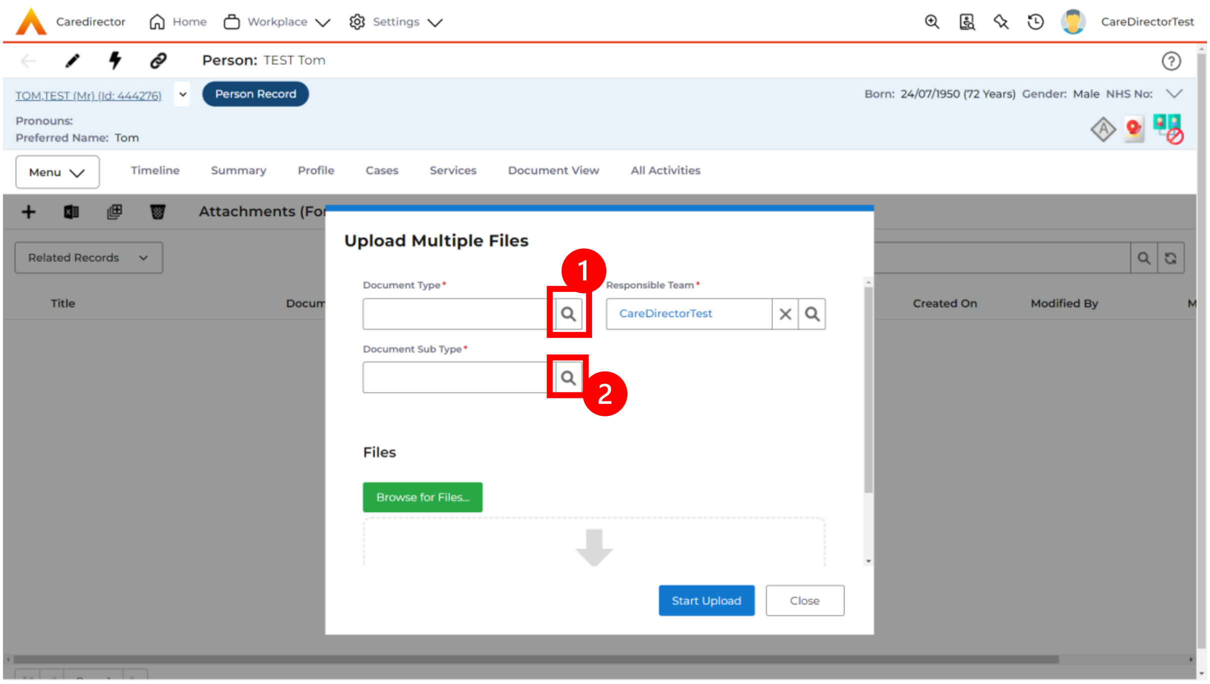
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



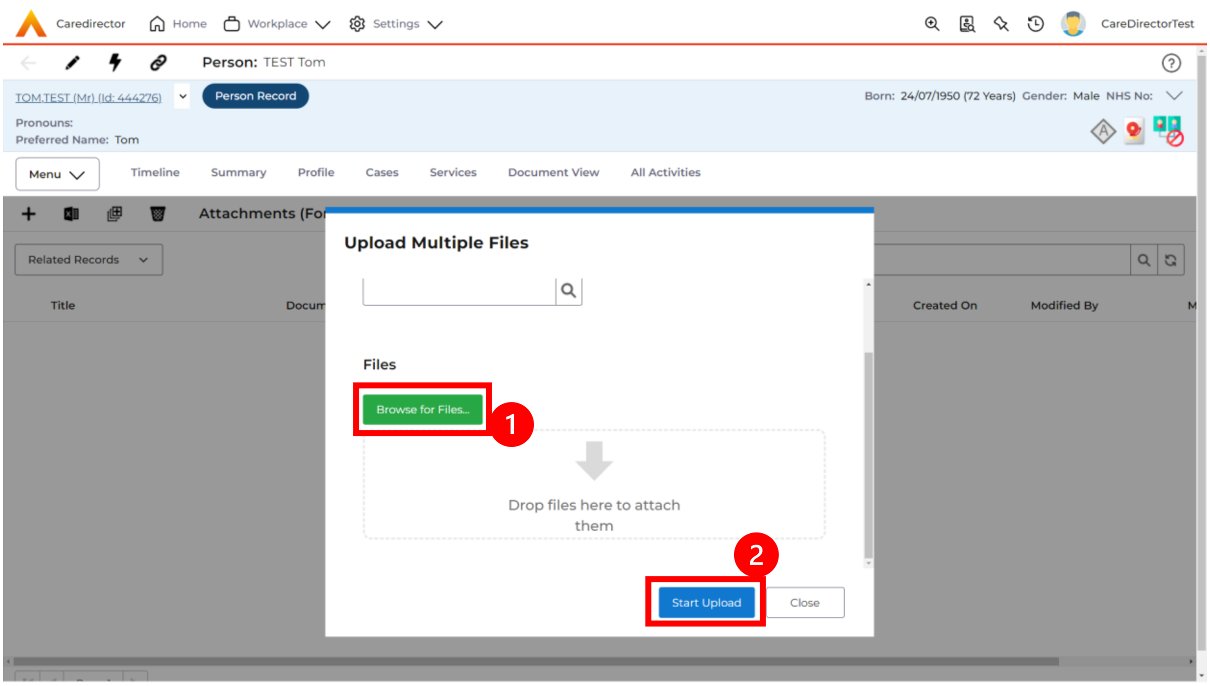
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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

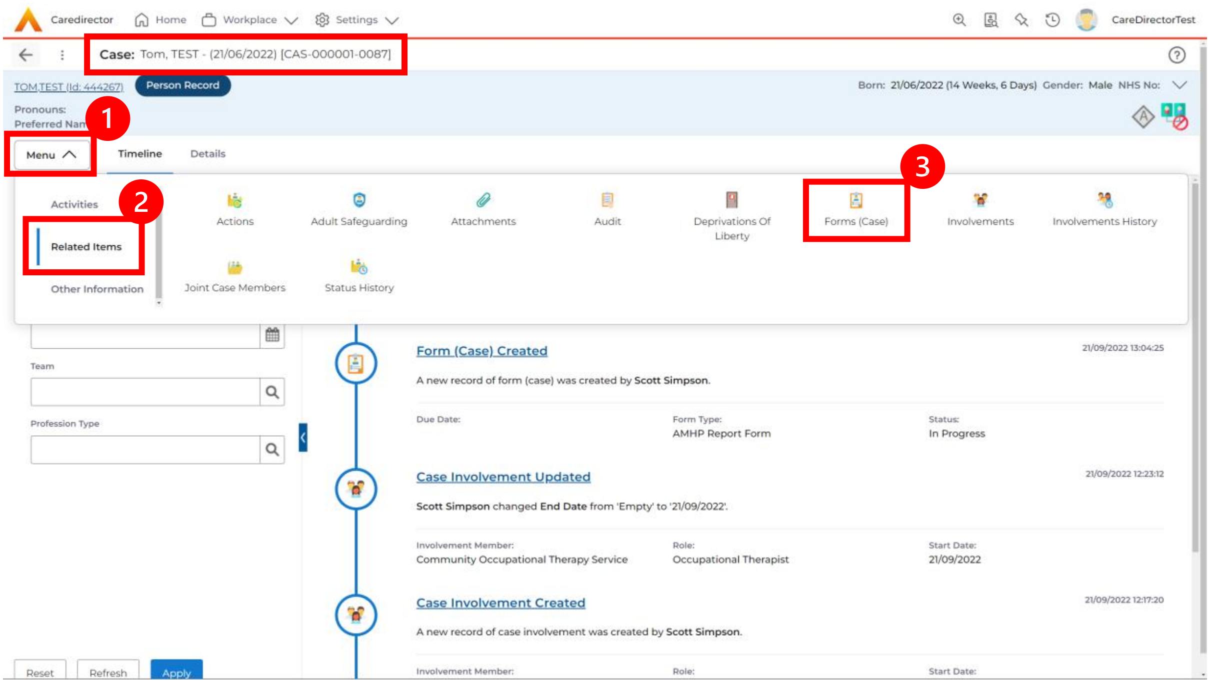


4. If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When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

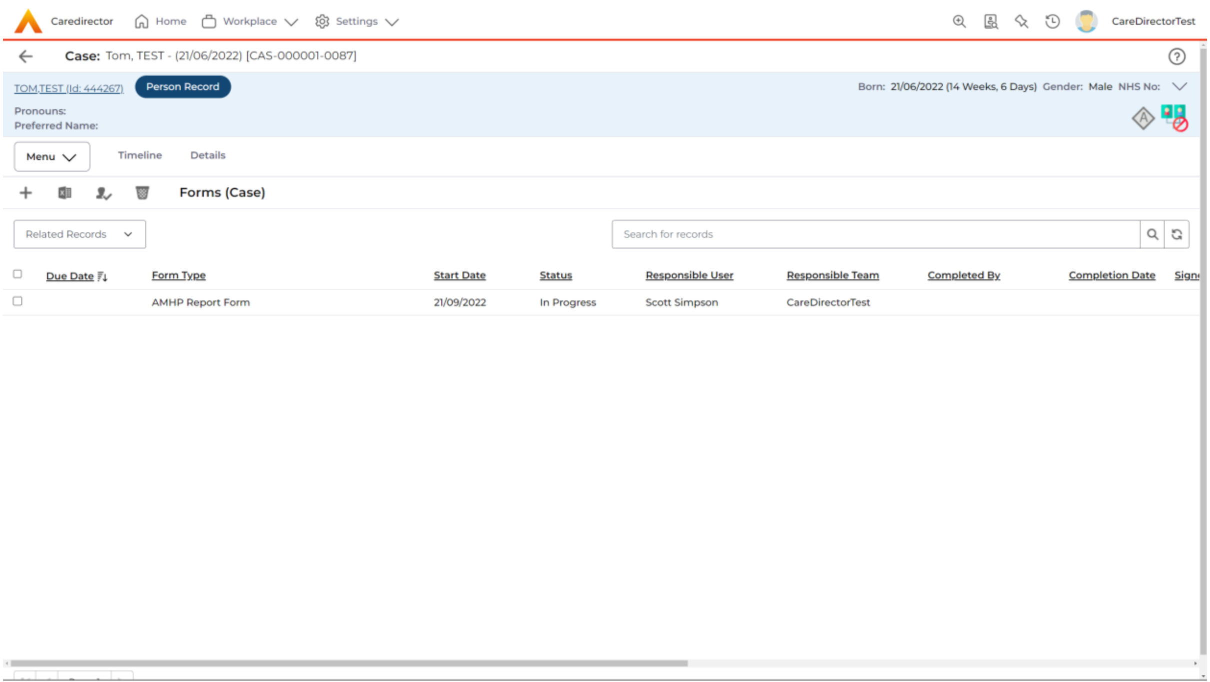


How to find a Form (Case)

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

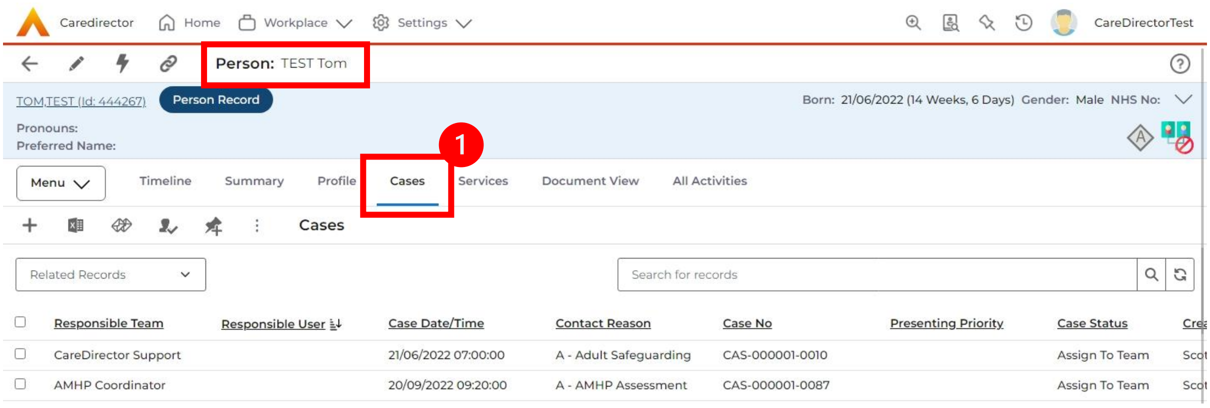


2. Select the relevant for **Form** to open.

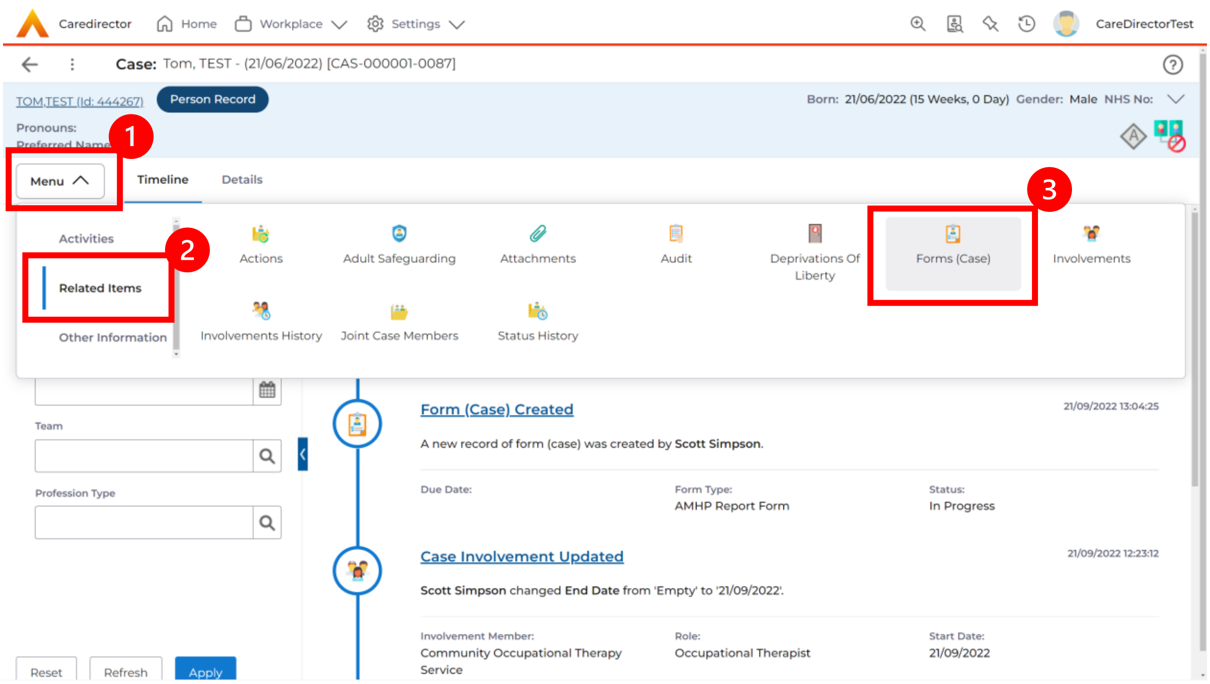


How to add a Form

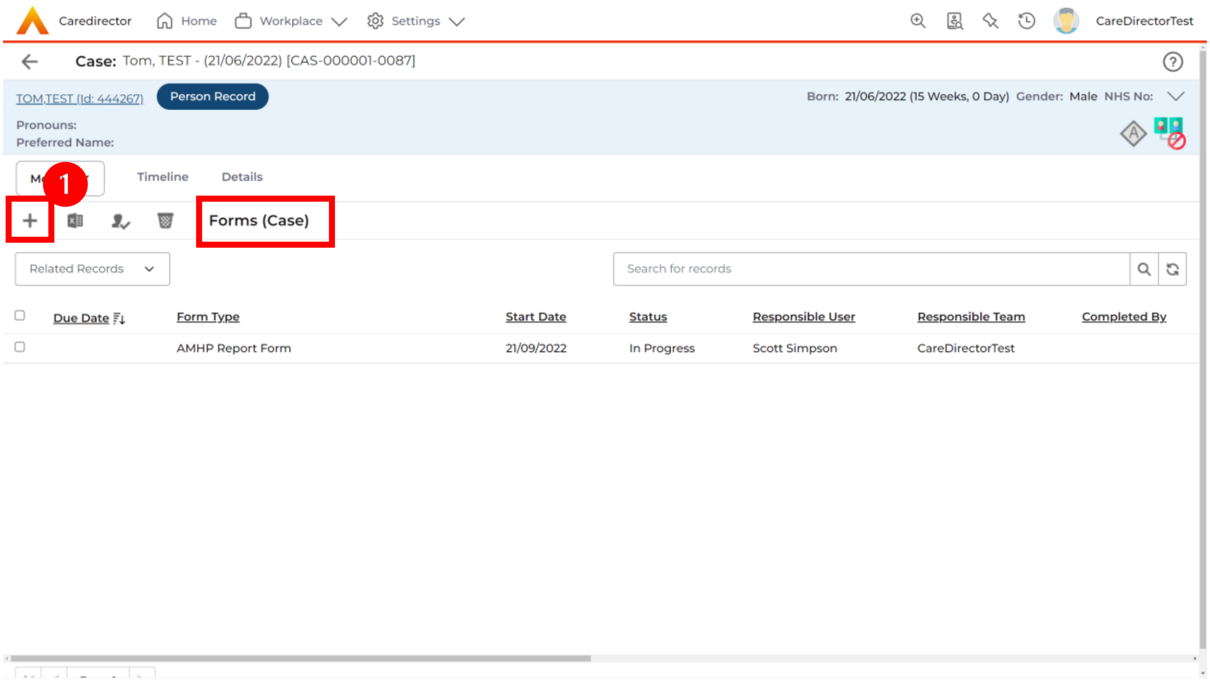
1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**. When found, select it to open the **Case Record**.



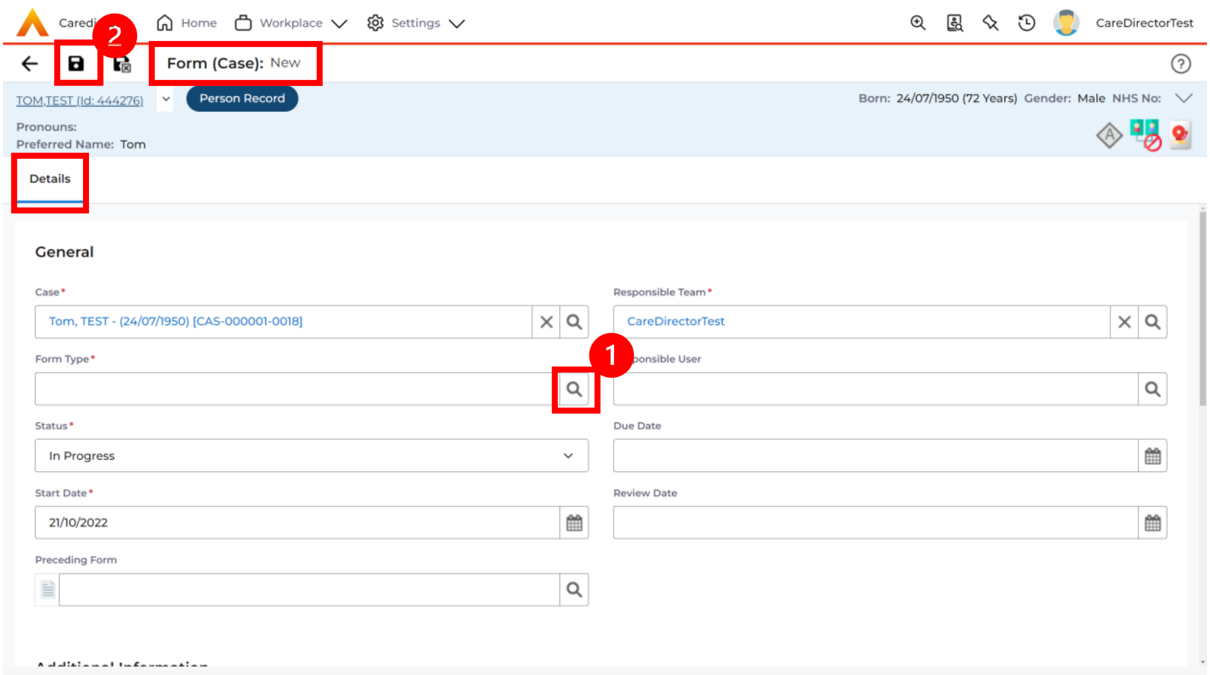
2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case).**



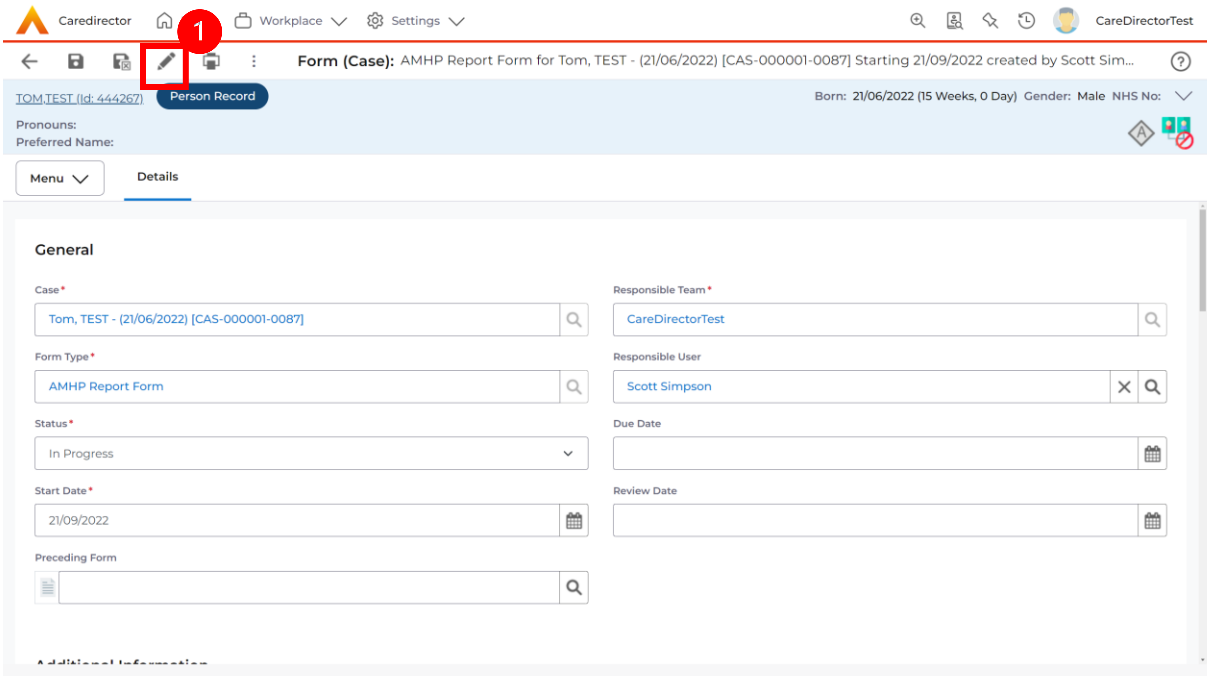
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



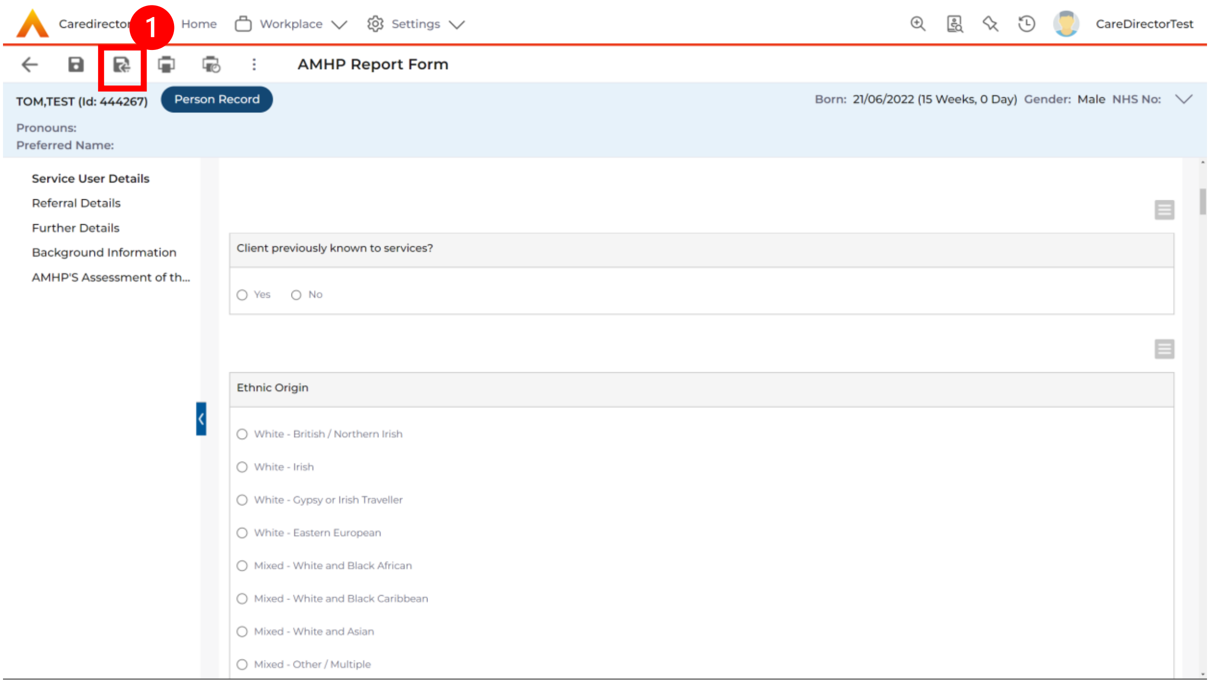
4. Once inside the **Details.** This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type.** When finished, select **Save.**



5. Now that CareDirector has given us the correct **Form**, the **Edit** button appears on the toolbar. This will allow us to go into the **Form** and fill it out.

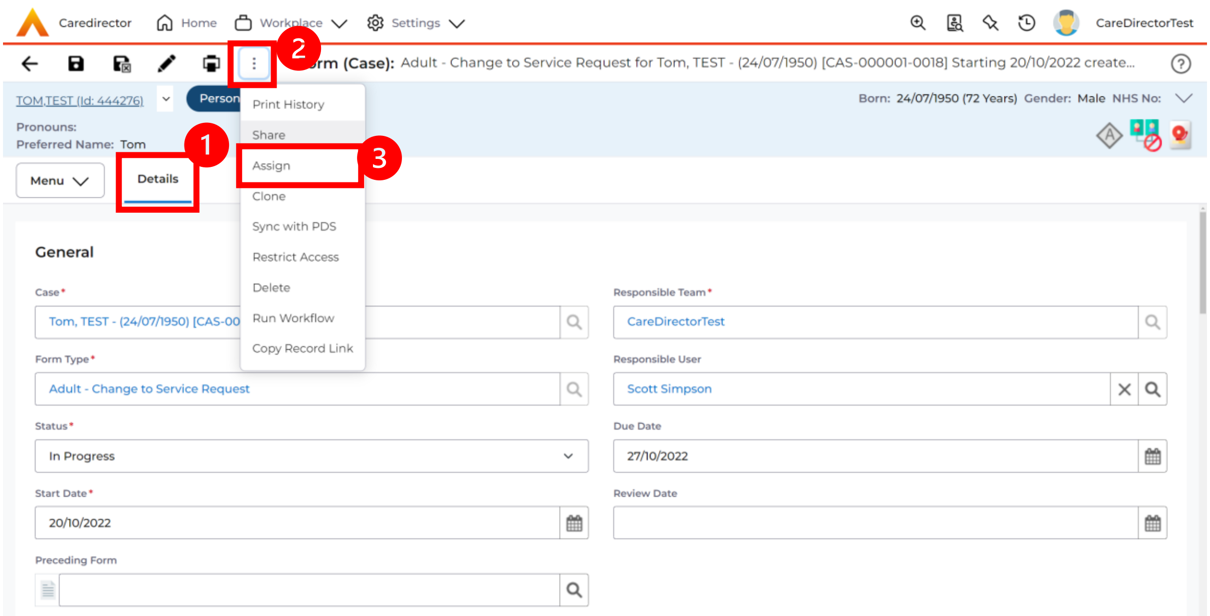


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

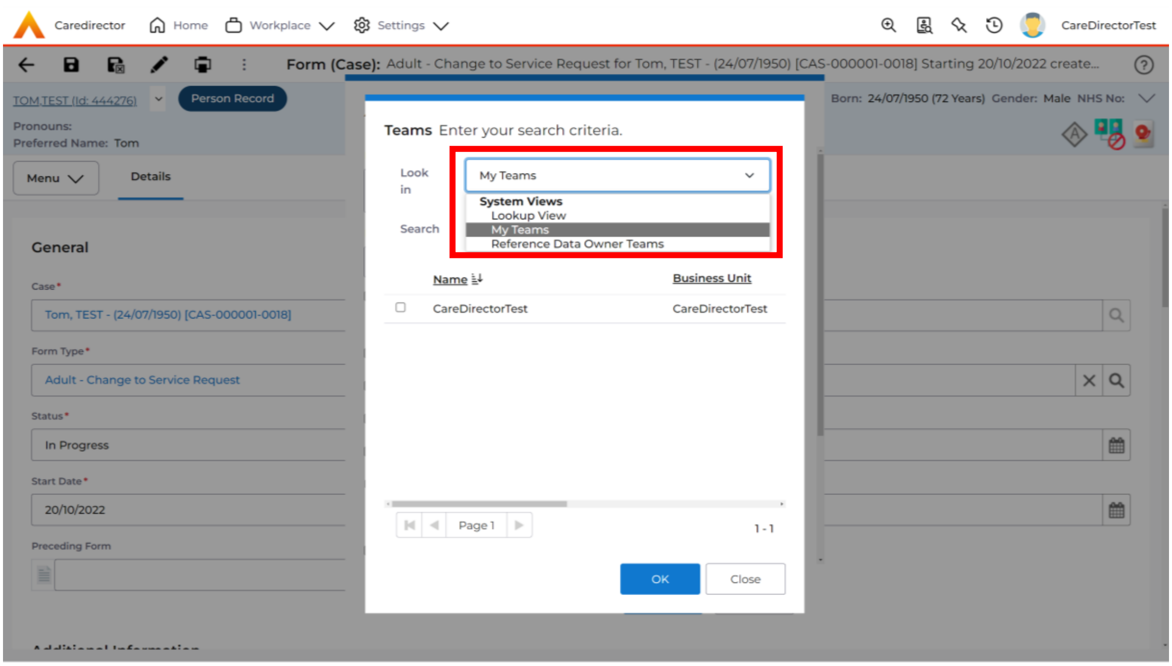


How to Allocate a Form

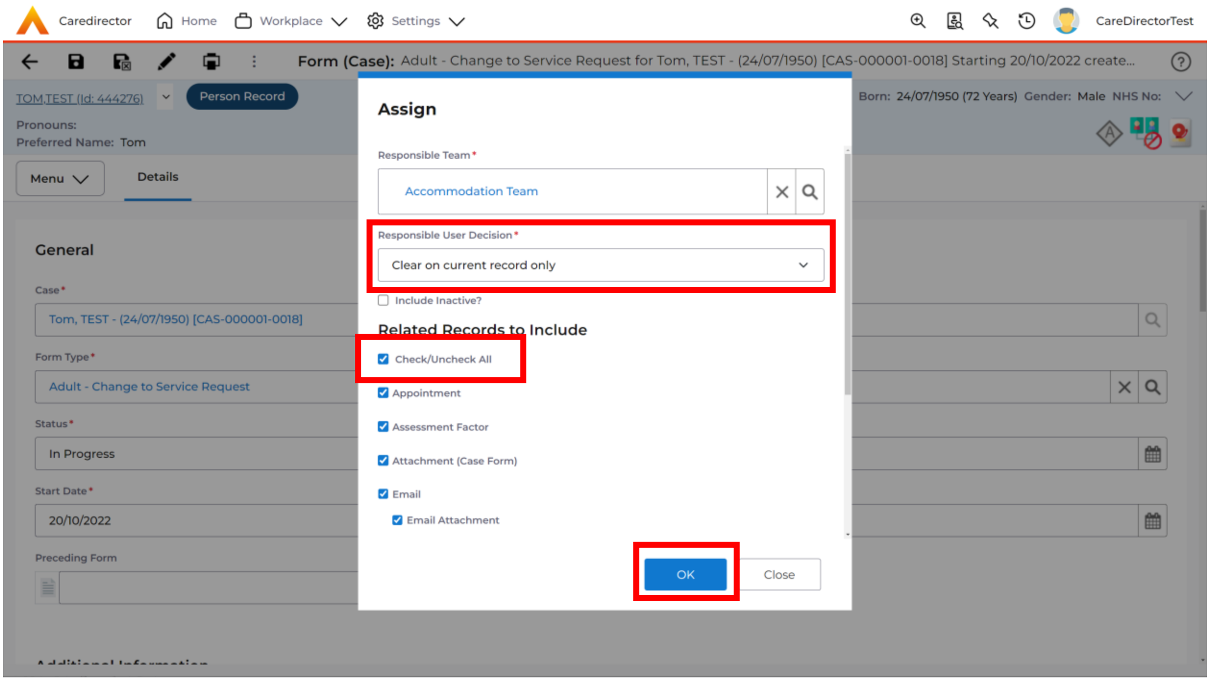
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



2. This will open a separate window for you to allocate this **Form** to another **Team**. Remember to select **Look in** and change to **Lookup View** to find teams.

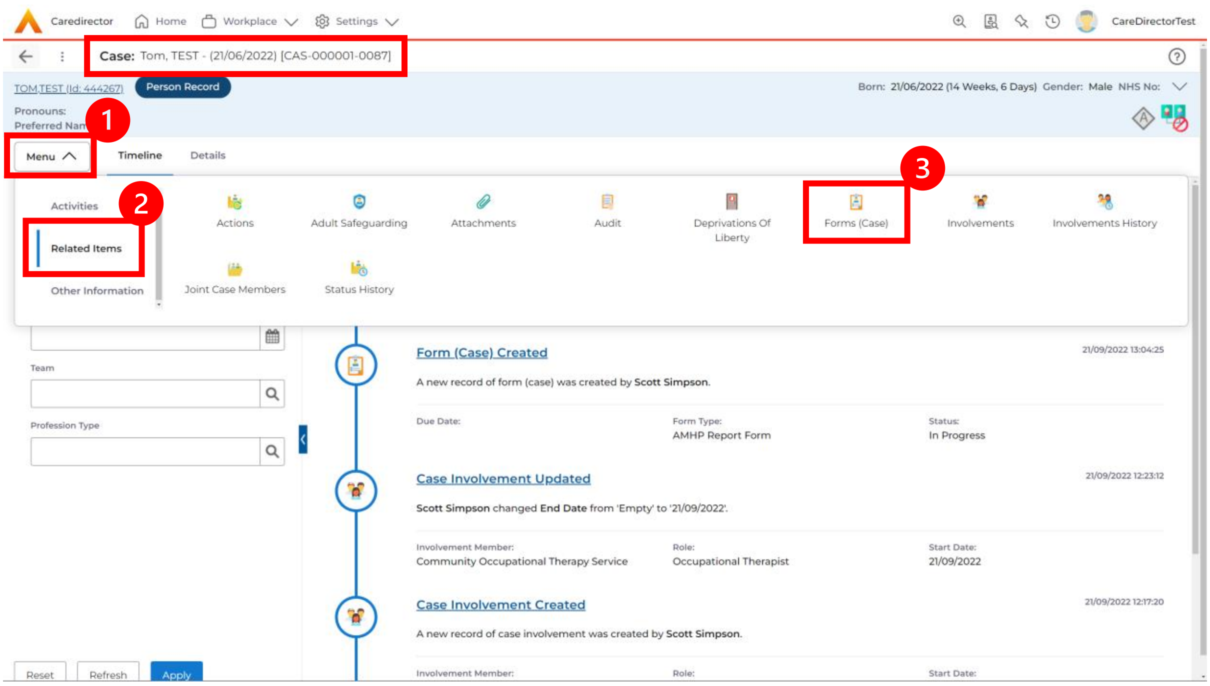


3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

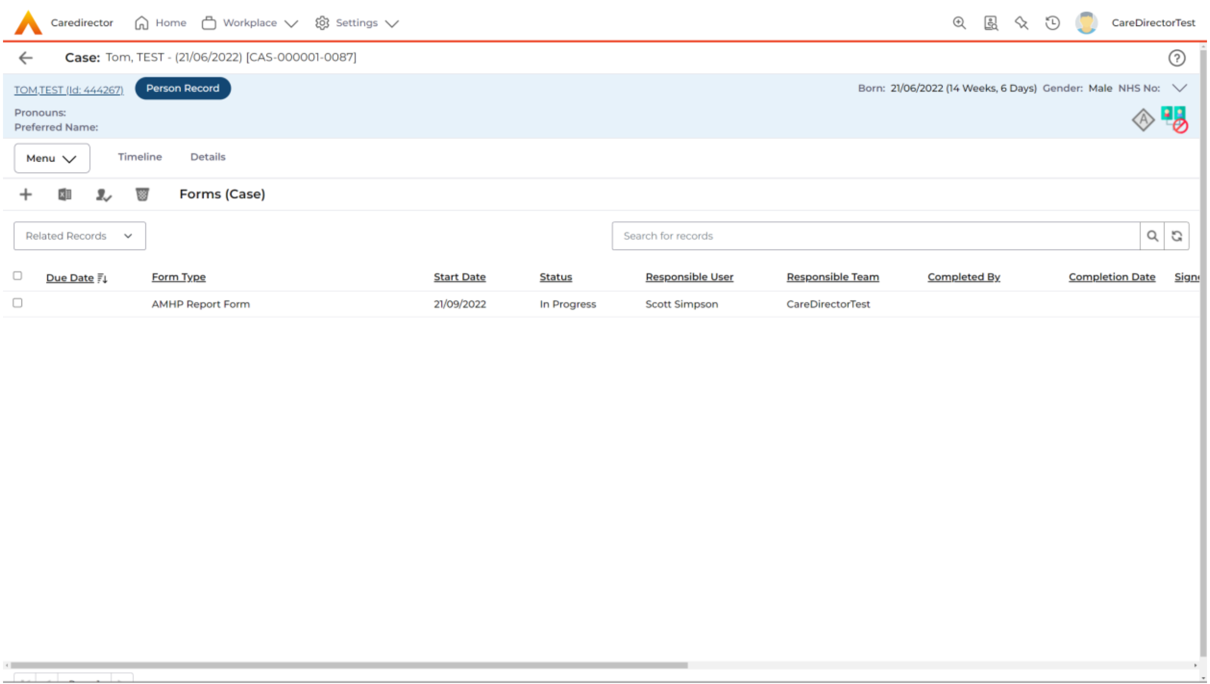


How to Clone a Form

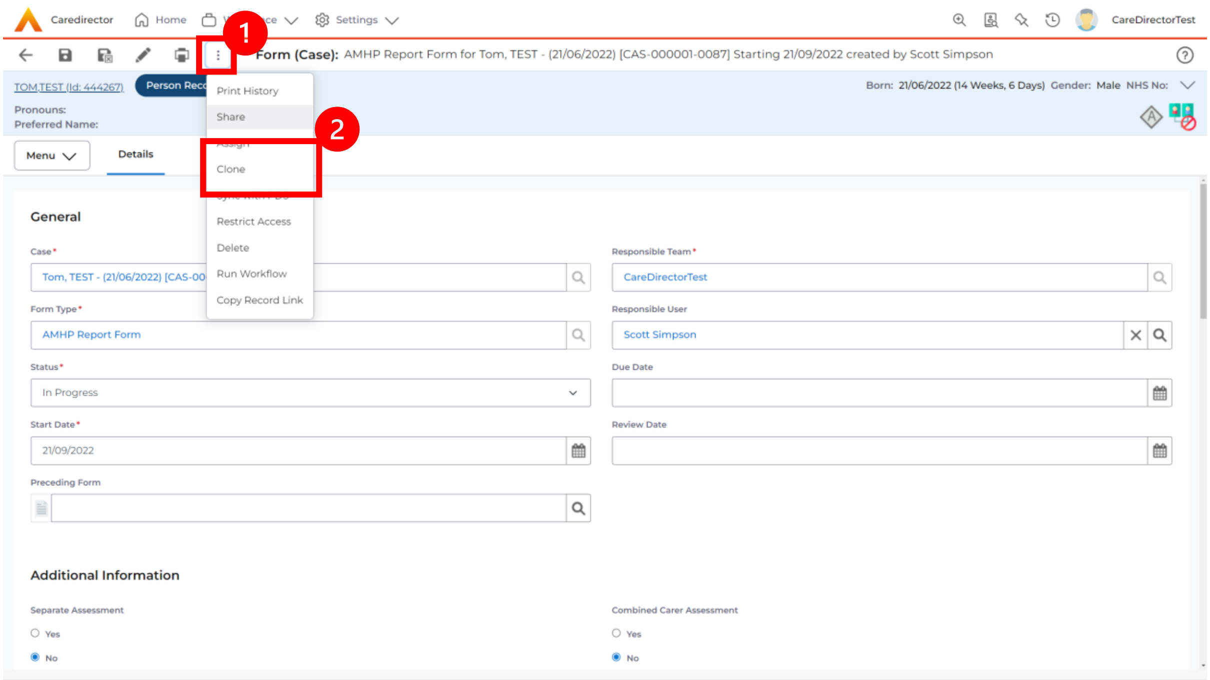
1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case).**



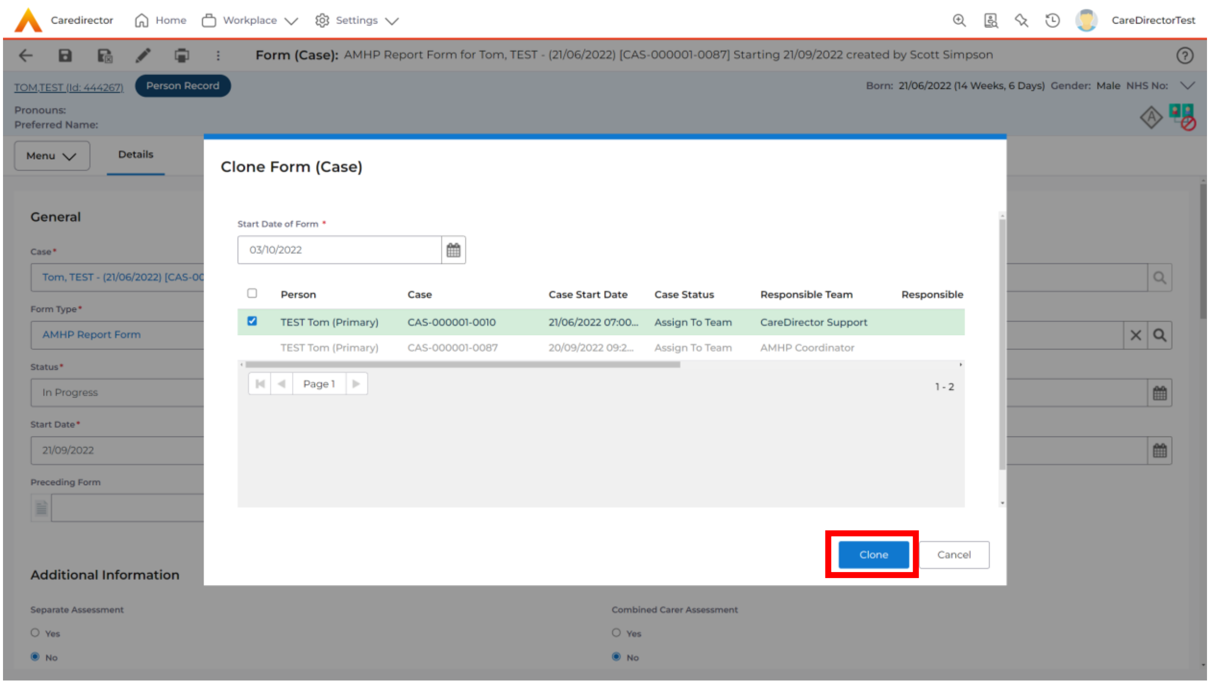
2. Select the relevant for **Form** to open.



3. From the toolbar, select the **Three Dots** and select **Clone.**

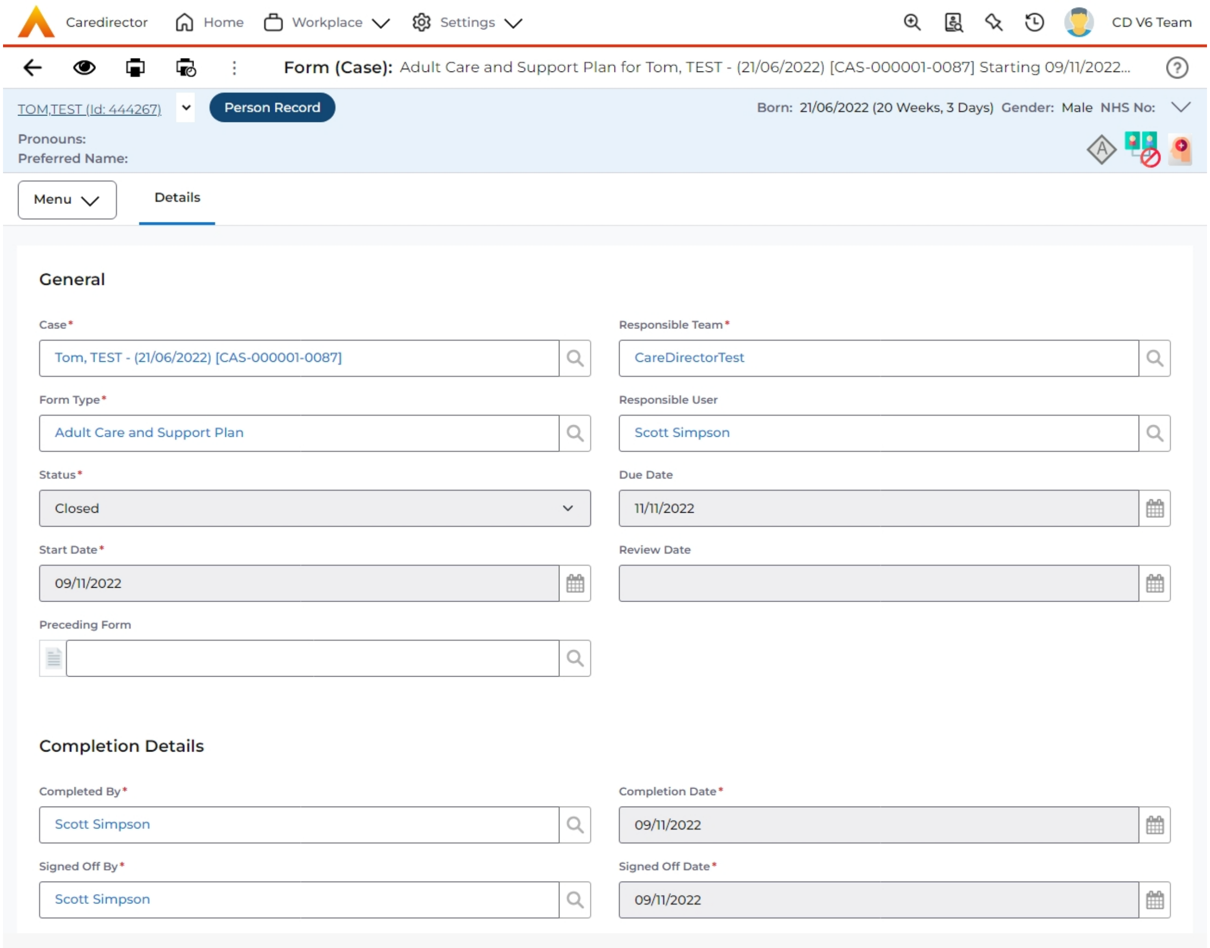


4. It will open a new window. Enter the **Start Date of Form.** Select which **Case** you would like this **Form** to be **Cloned** to. When check boxed, select **Clone.**



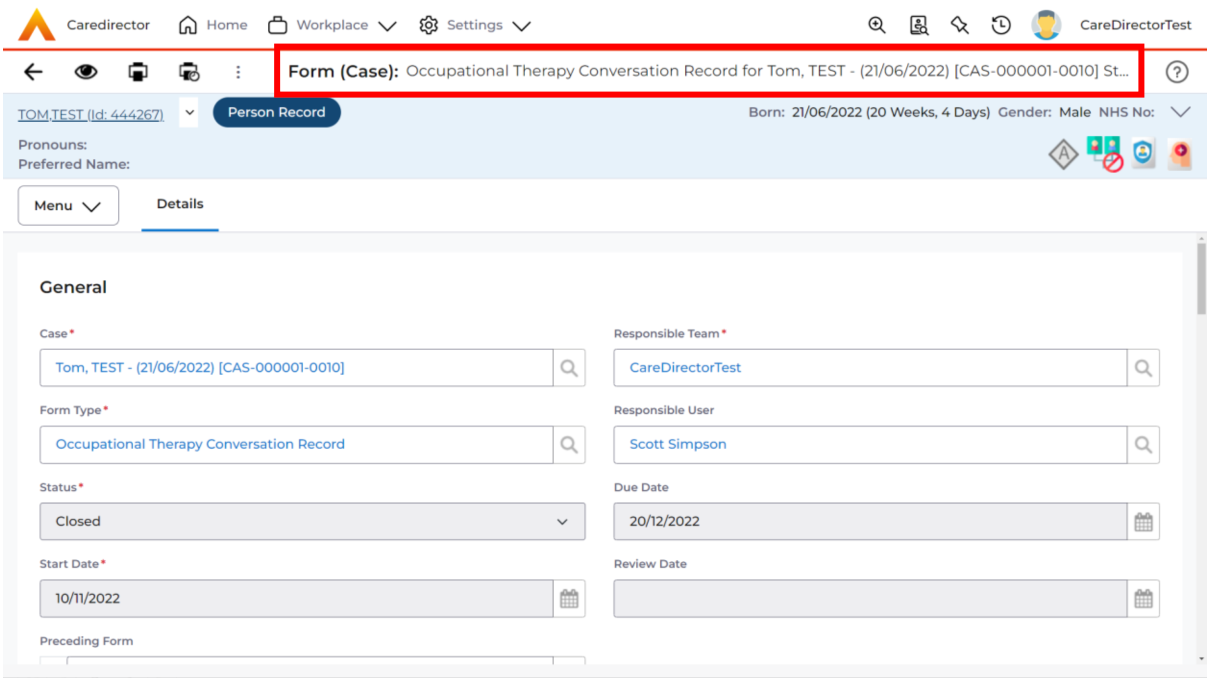
5. You do not need to **Save** this.

6. 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**.

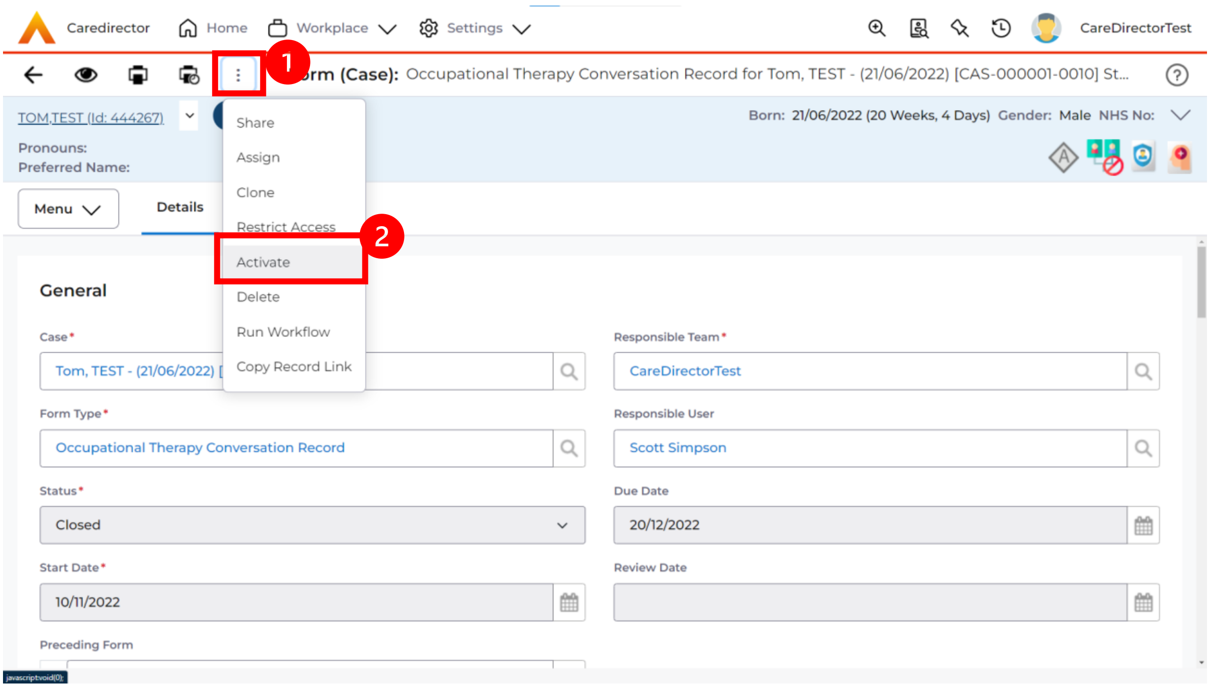


How to reactivate a Closed Form

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

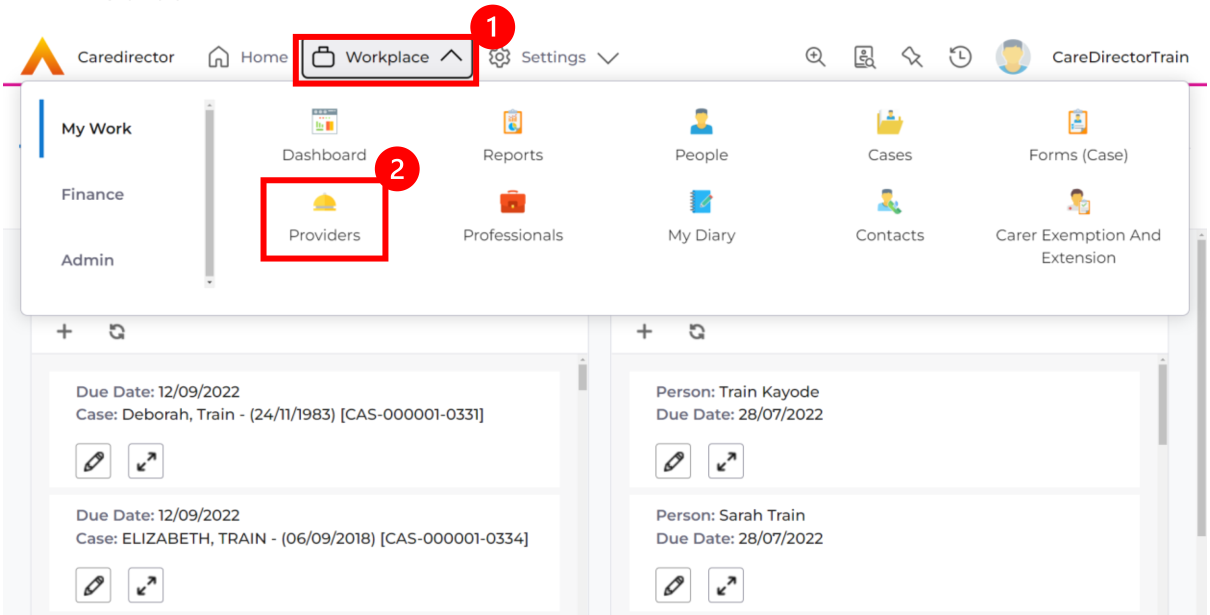


2. Select the **Three Dots** and select **Activate.**

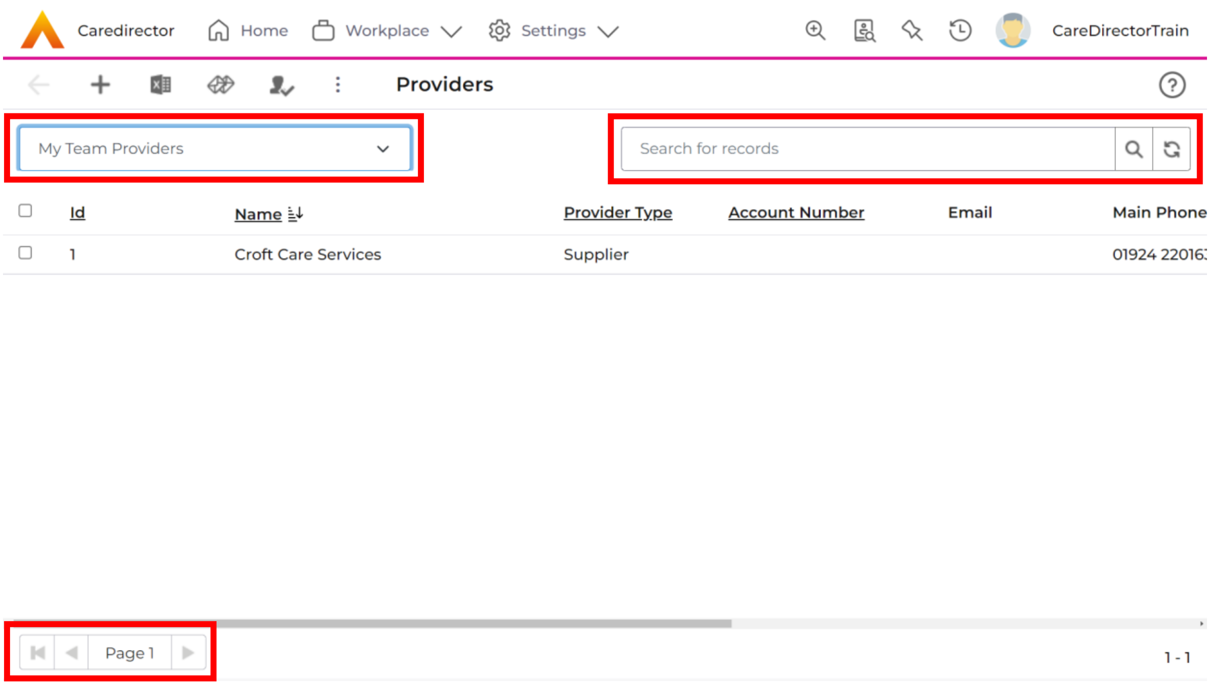


How to search for a Provider

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

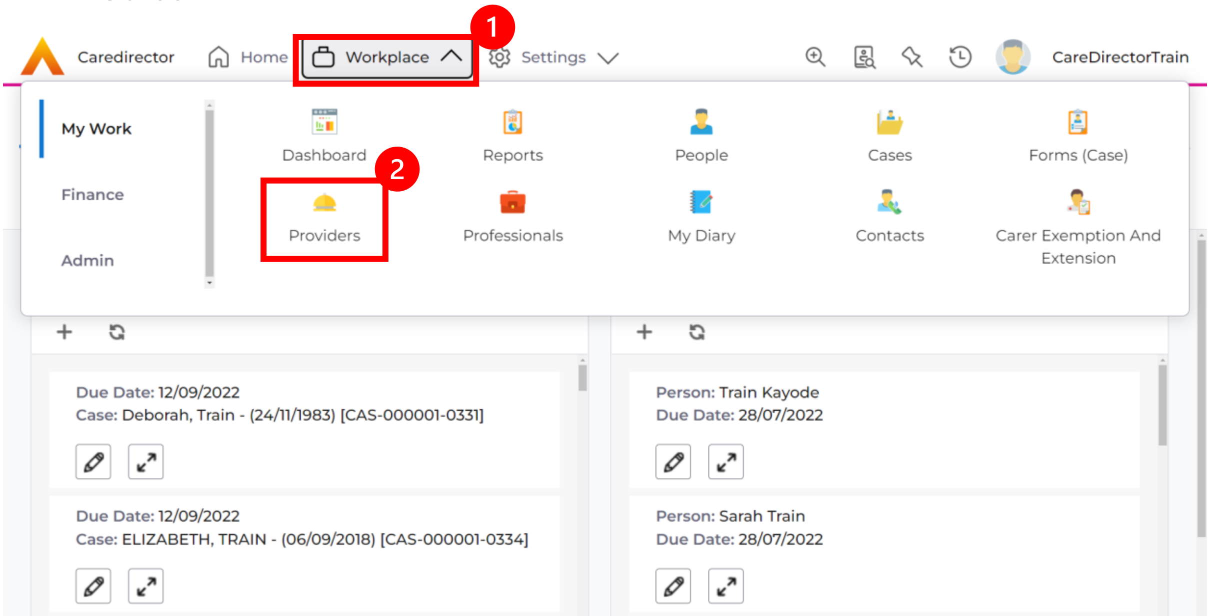


2. Use the **System View** or the **Search** box to enter in the name of a **Provider.** Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

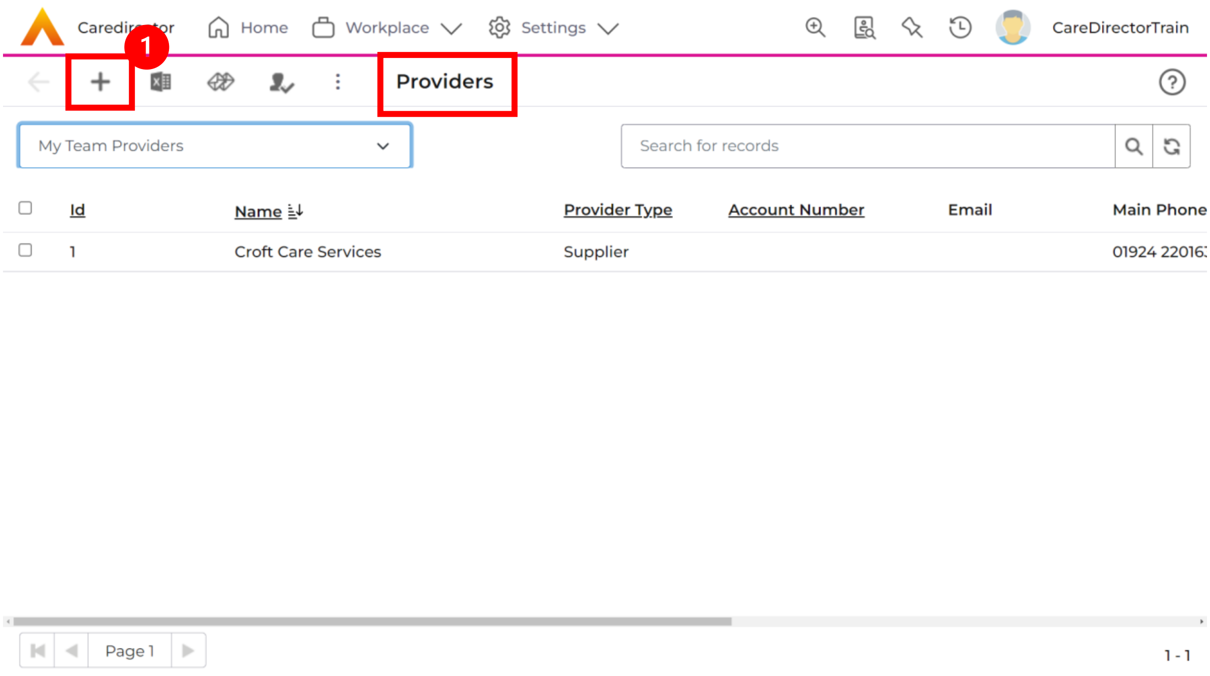


How to set up a new Provider

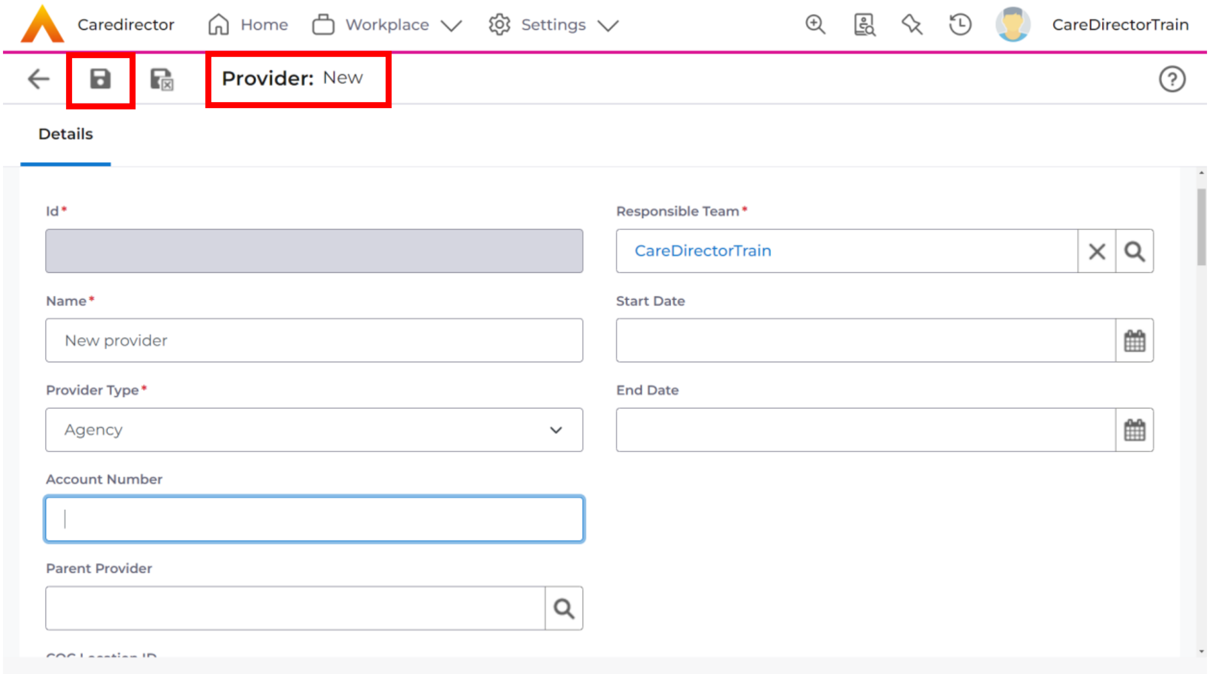
1. Select **Workplace**, then **Provider**. This will open the **Provider Search Screen.**



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.**

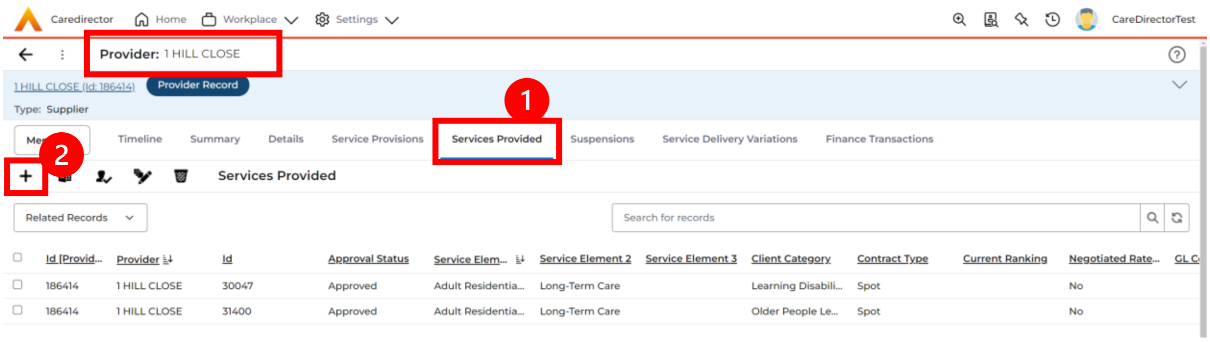


3. Fill in the appropriate information, ensuring all fields marked with a red asterix (*) are completed. When finished, select **Save** from the toolbar.

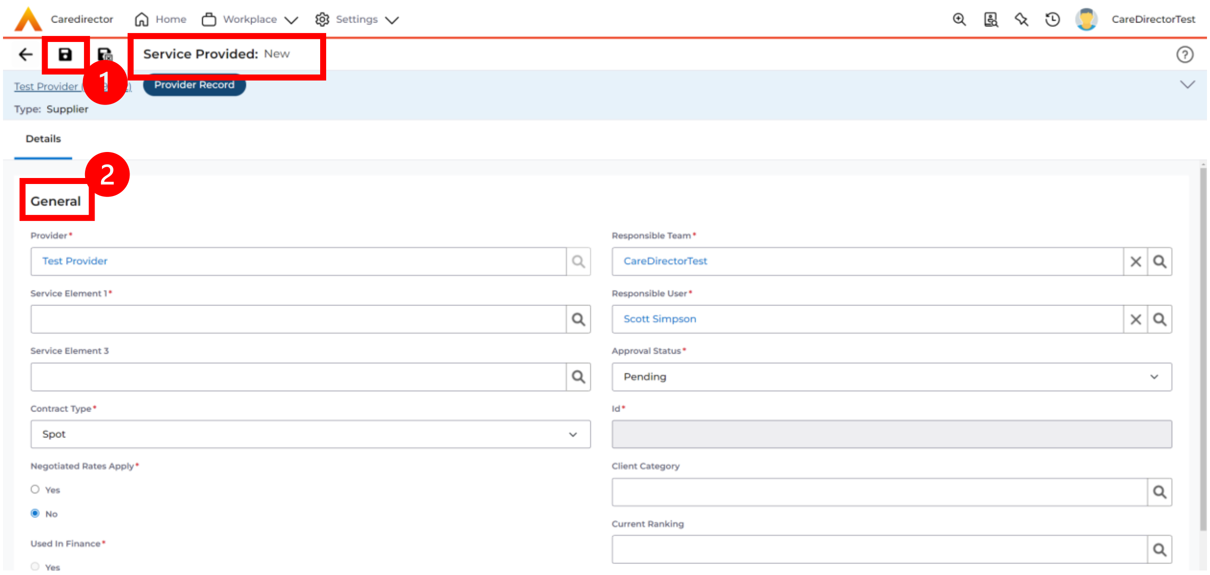


How to add a Service Type

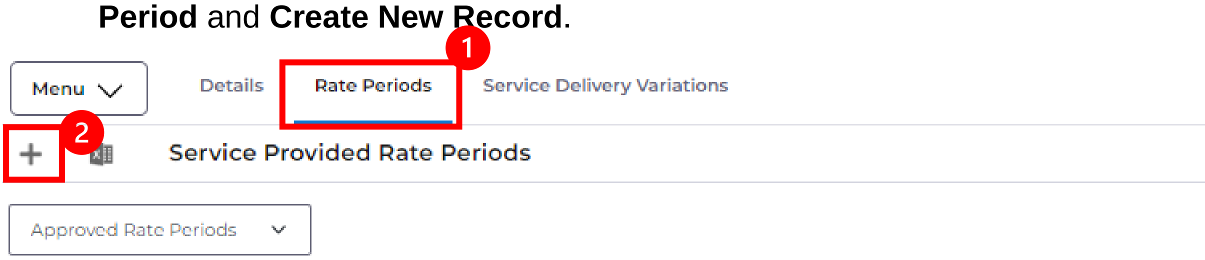
1. Locate the **Provider**. Select the **Services Provided** tab and select **Create New Record** from the toolbar.



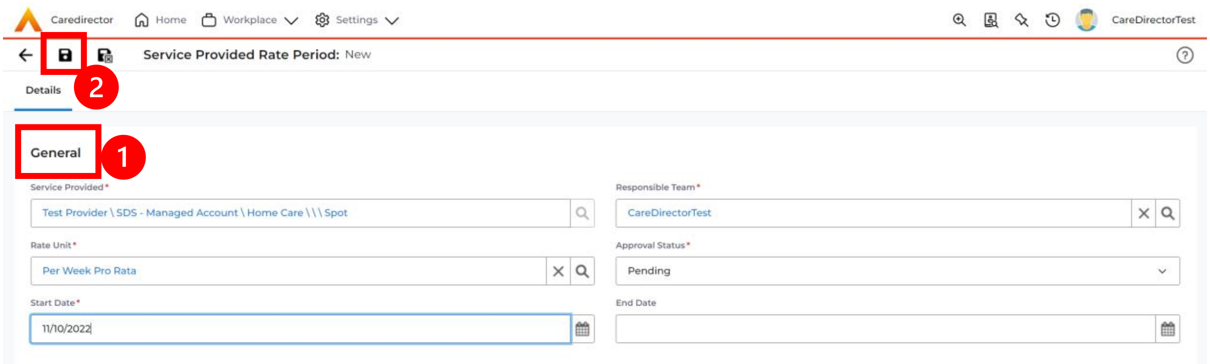
2. The **Services Provided** creation screen will show. Fill out the information ensuring all mandatory fields are completed before **Saving**.



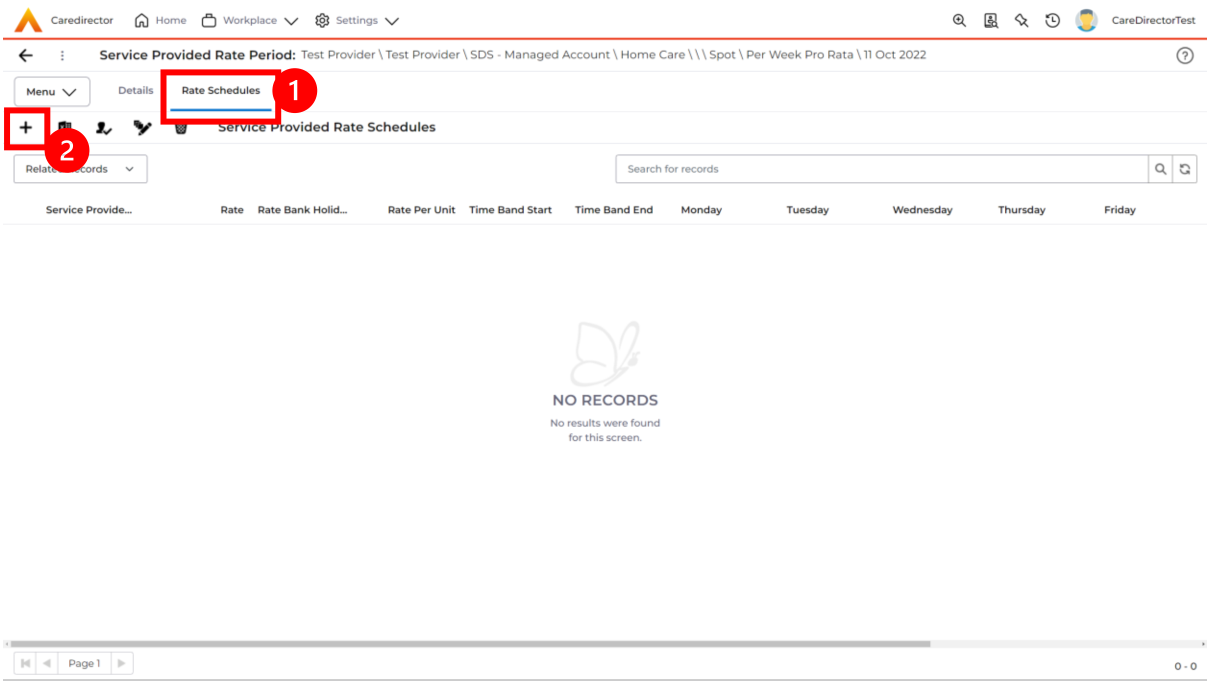
3. When **saved,** a **Rate Periods** tab will appear. Select it and select **Create New Record** from the toolbar or input an **End Date** into an existing **Rate Period** and **Create New Record**.



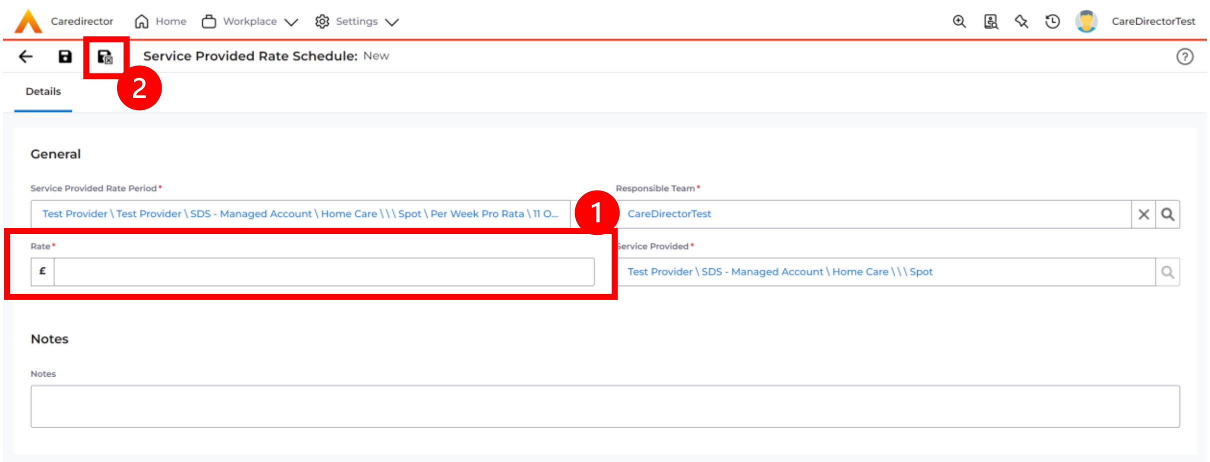
4. Enter the relevant information and select **Save** from the toolbar.



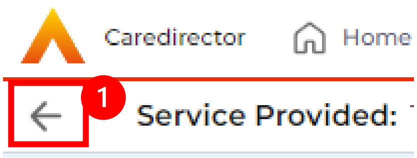
5. A new tab called **Rate Schedules** will appear. Select the tab and select **Create New Record** from the toolbar.



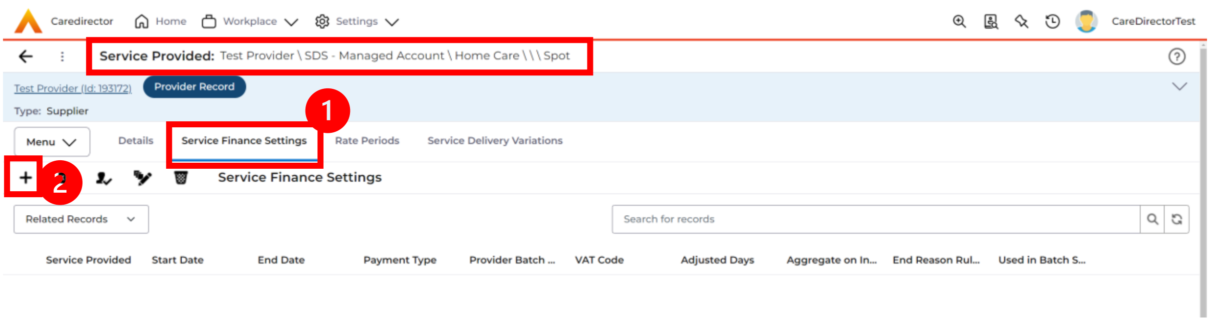
6. Enter the appropriate **Rate** (you do not have to select days when the **Rate Unit** is **Per Week Pro Rata**). Select **Save and Return to Previous Page** on the toolbar.



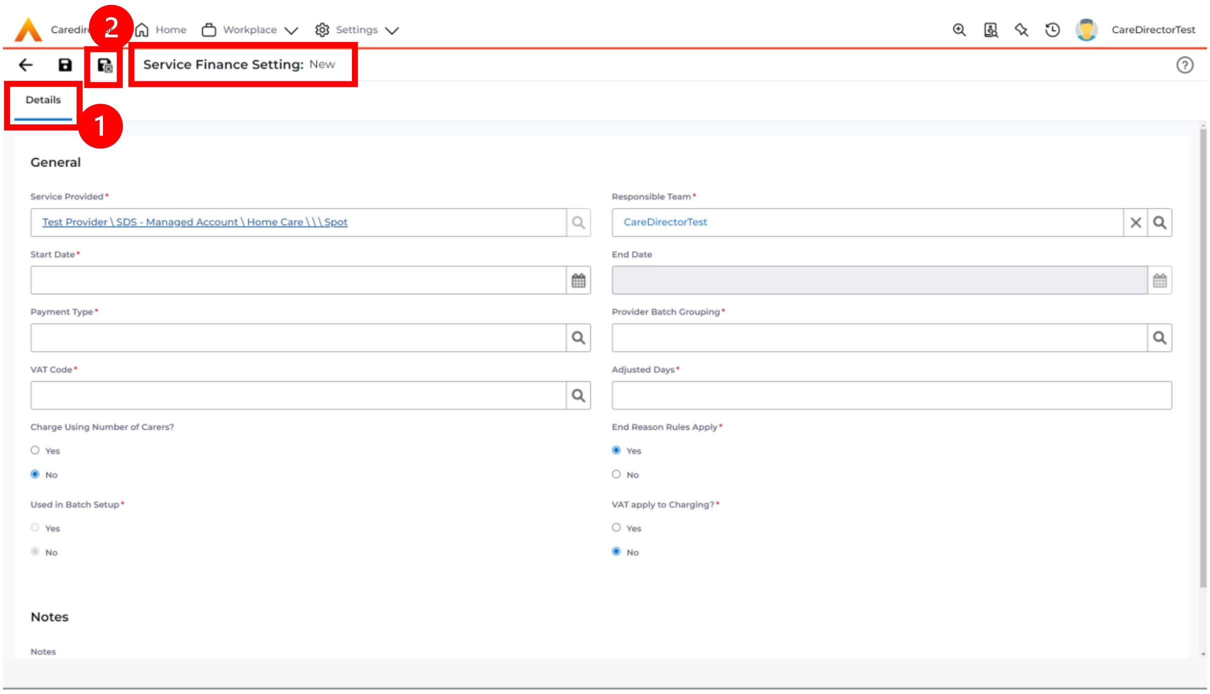
7. Select **Back** on the toolbar to return to **Service Provided.**



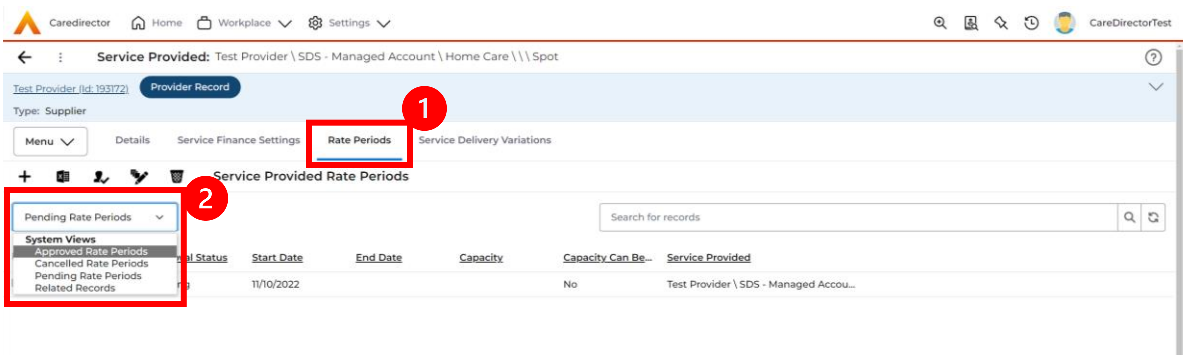
8. Under **Service Provided** select the **Service Finance Settings** tab and **Create New Record** from the toolbar.



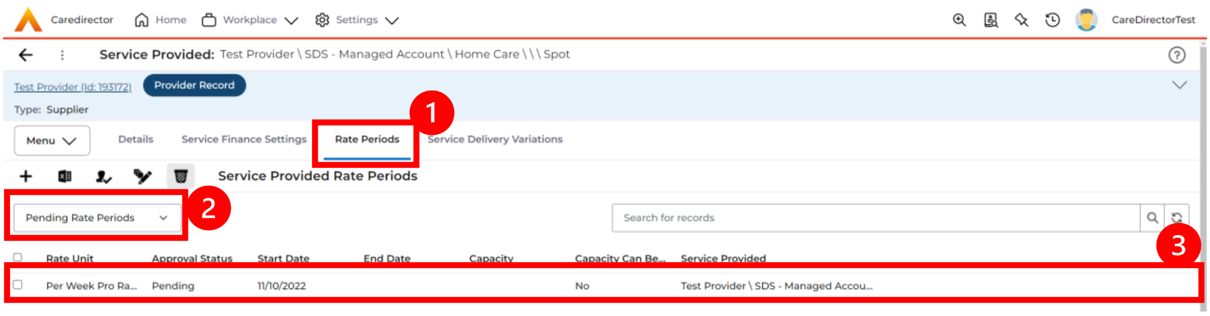
9. Enter the relevant information and when completed, select **Save and Return to Previous Page.**



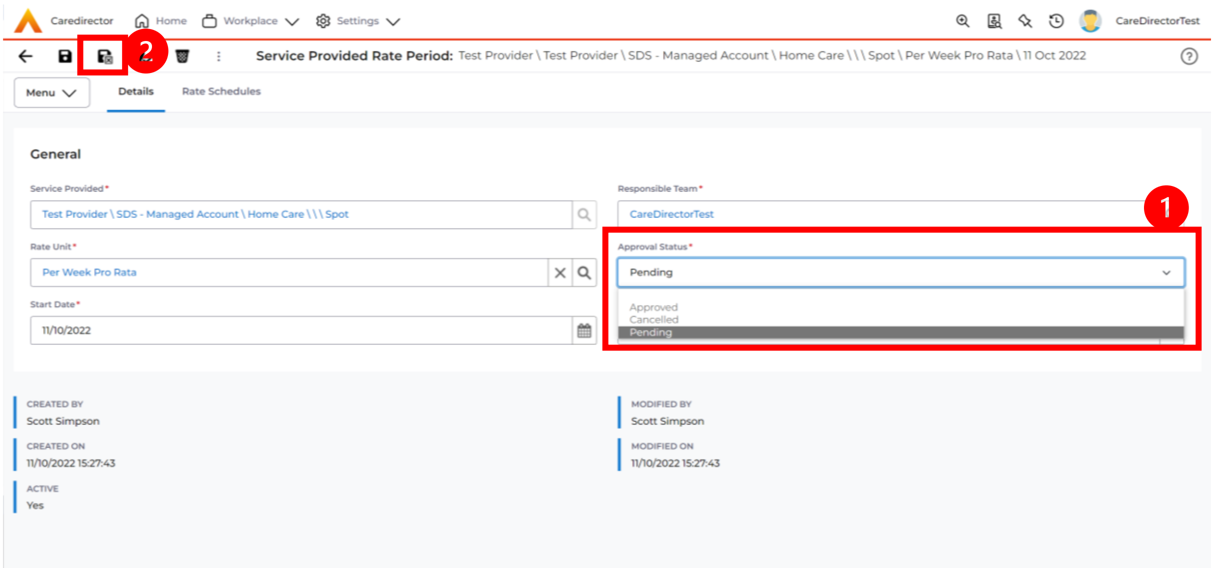
10. Select **Rate Periods.** The **System View** can be changed to show only **Pending Rate Periods** or **Approved Rate Periods**. Select **Pending Rate Periods** this will show records that need to be changed the status of.



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



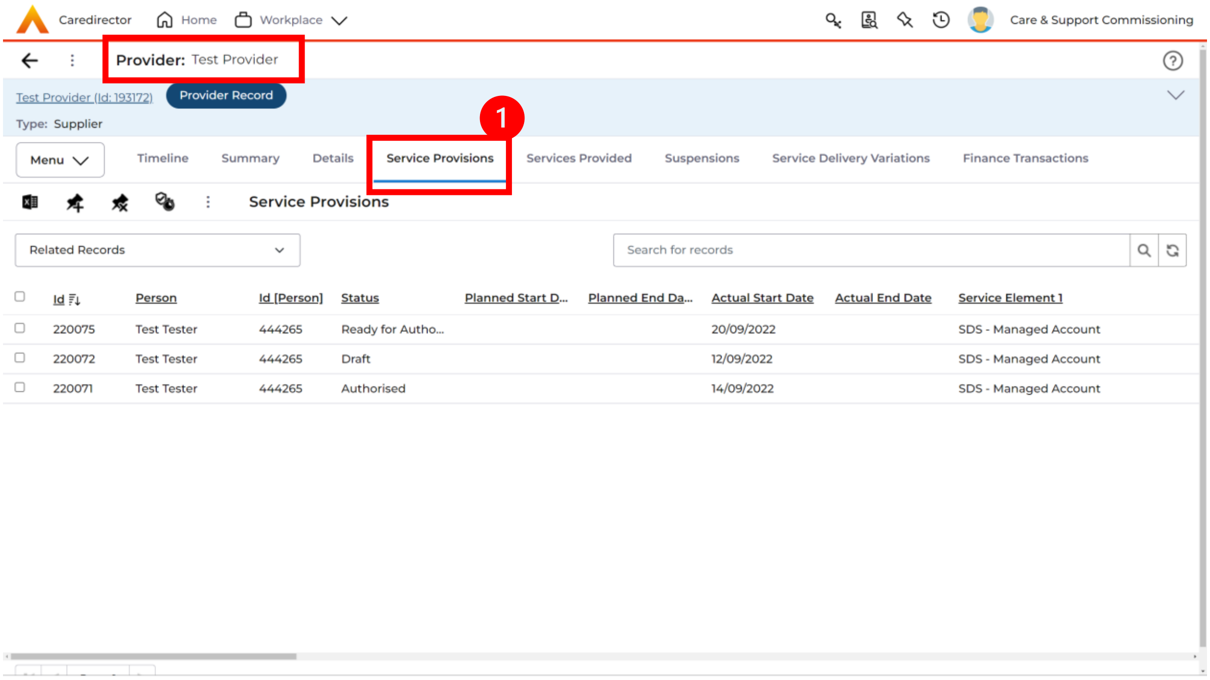
12. Change the **Approval Status** from the **Pending** to **Approved.** Select **Save and Return to Previous Page** from the toolbar.



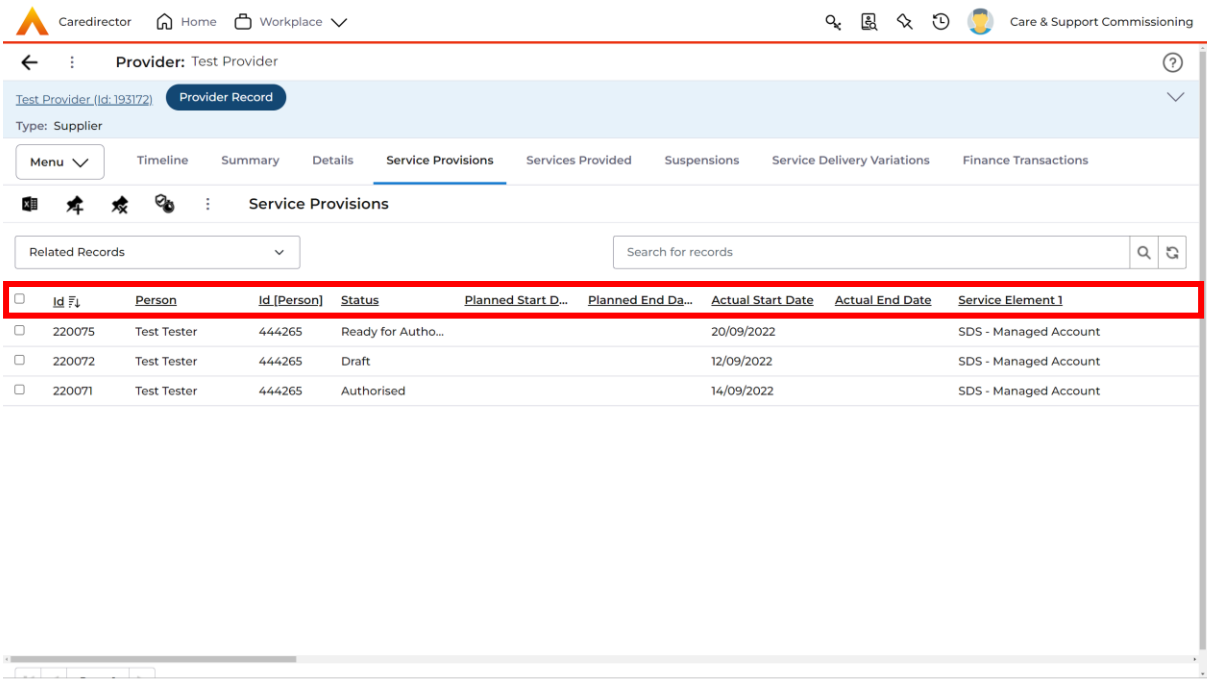
13. Your **Provider** is now able to be used in **Service Provisions**. A new **Service Provided** record will need setting up for each **Band** relevant to that **Provider.**

How to see Provider Service Provisions

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

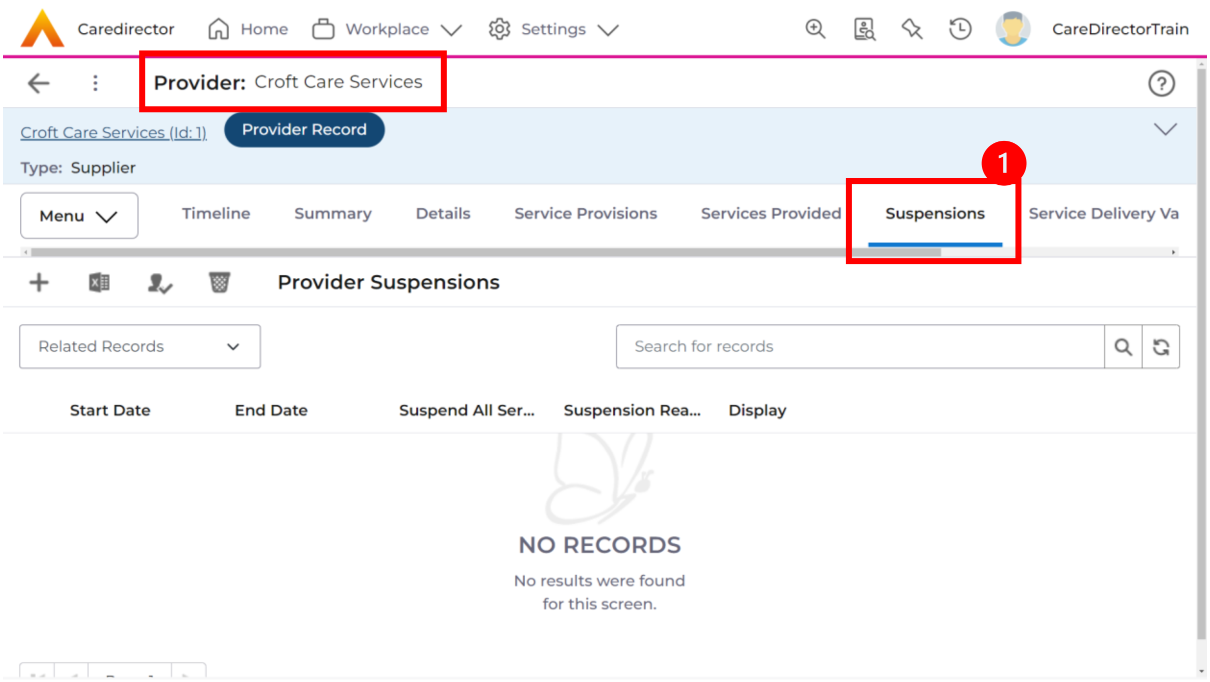


2. This will show information based around the **Service Provisions** that are undergoing under this **Provider**. Scroll across this page to see information based on the headings. Select a **Service Provision** to see more.



How to see Provider Suspensions

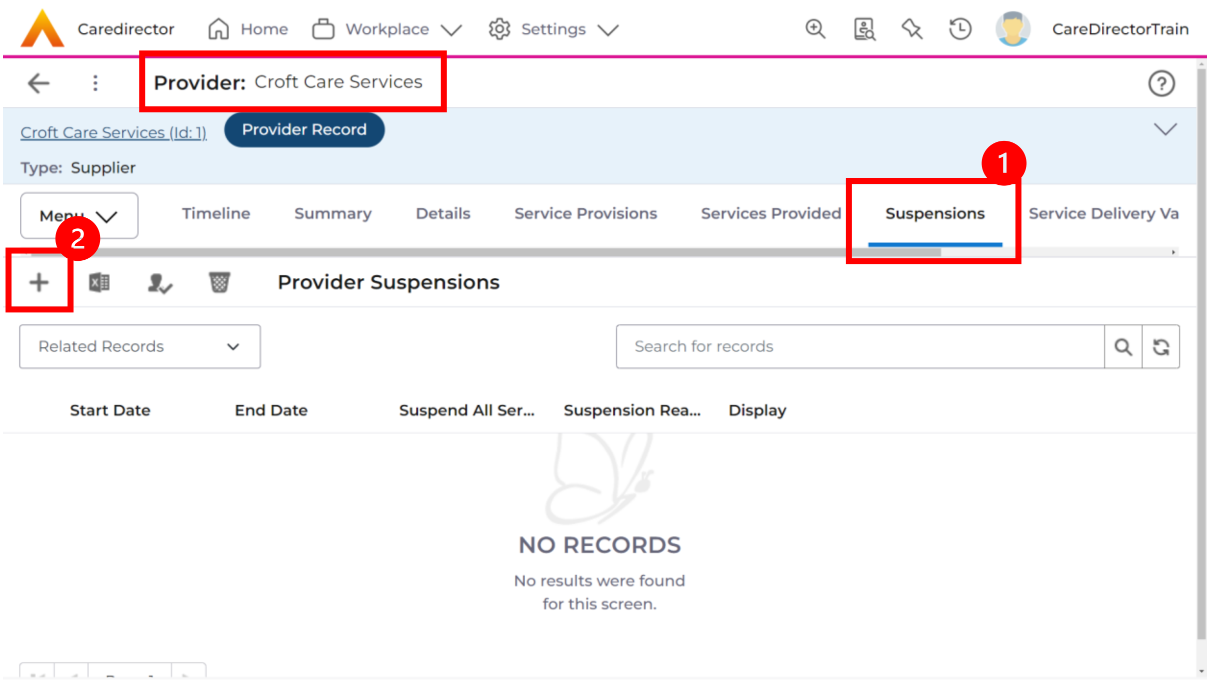
1. Locate the relevant **Provider.** Once on the **Provider** screen, select the **Suspensions** tab.



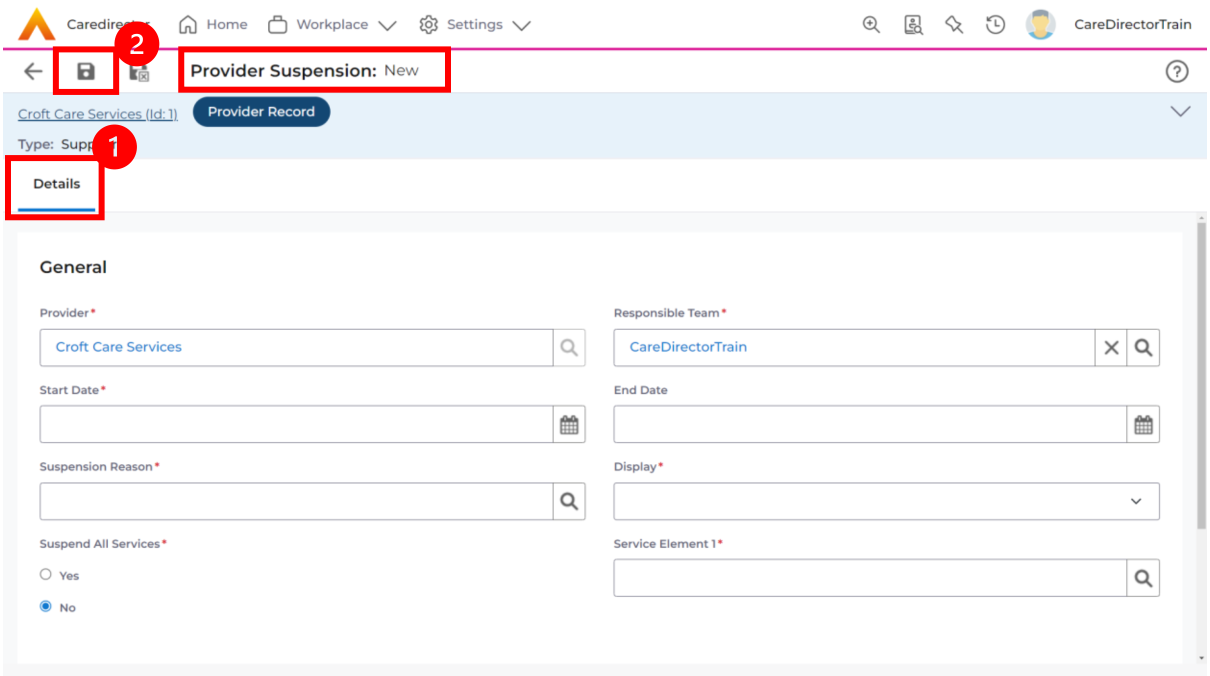
2. This will show a list of all **Suspensions** occurred on the **Provider.**

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.

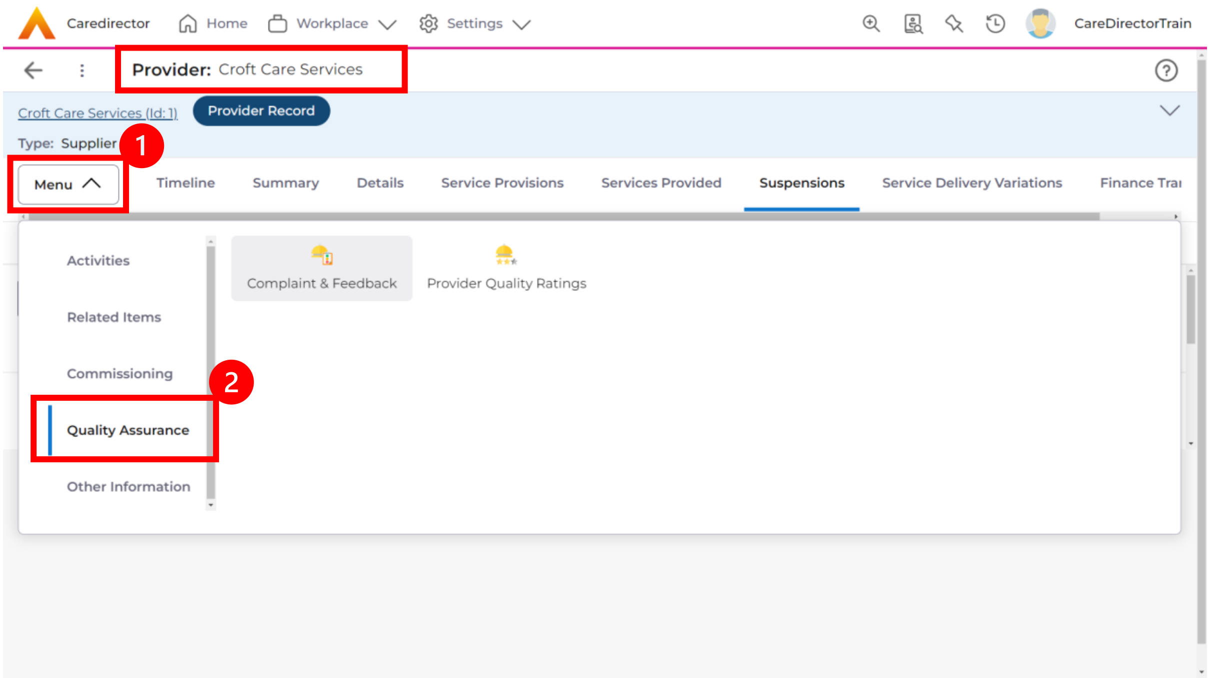


2. This will open the **Suspension** creation screen. Fill in the mandatory fields and select **Save** from the toolbar when done.



Overview of the Quality Assurance

1. Locate the relevant **Provider.** Select **Menu**, **Quality Assurance** sub-category. Select the appropriate section.

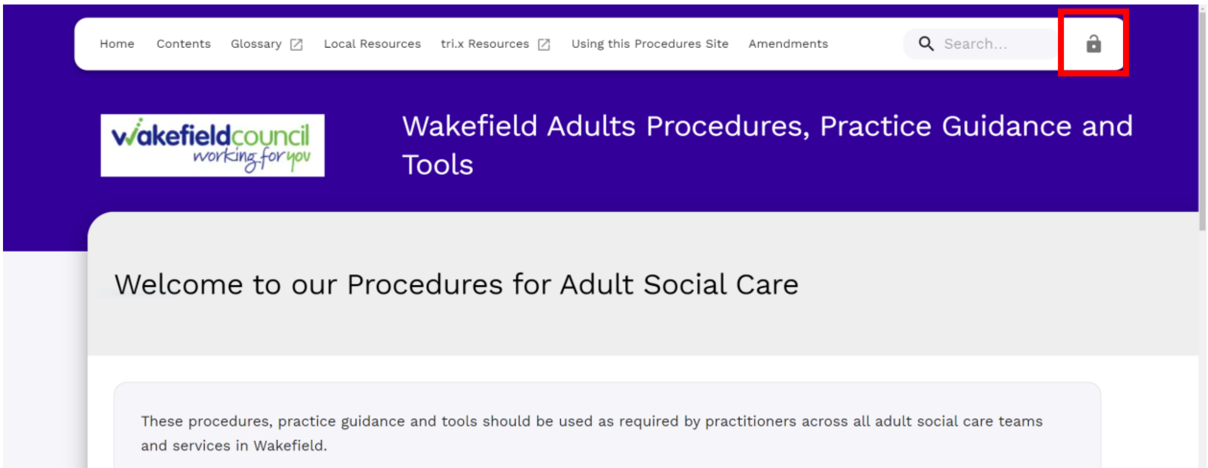


Further CareDirector Guidance

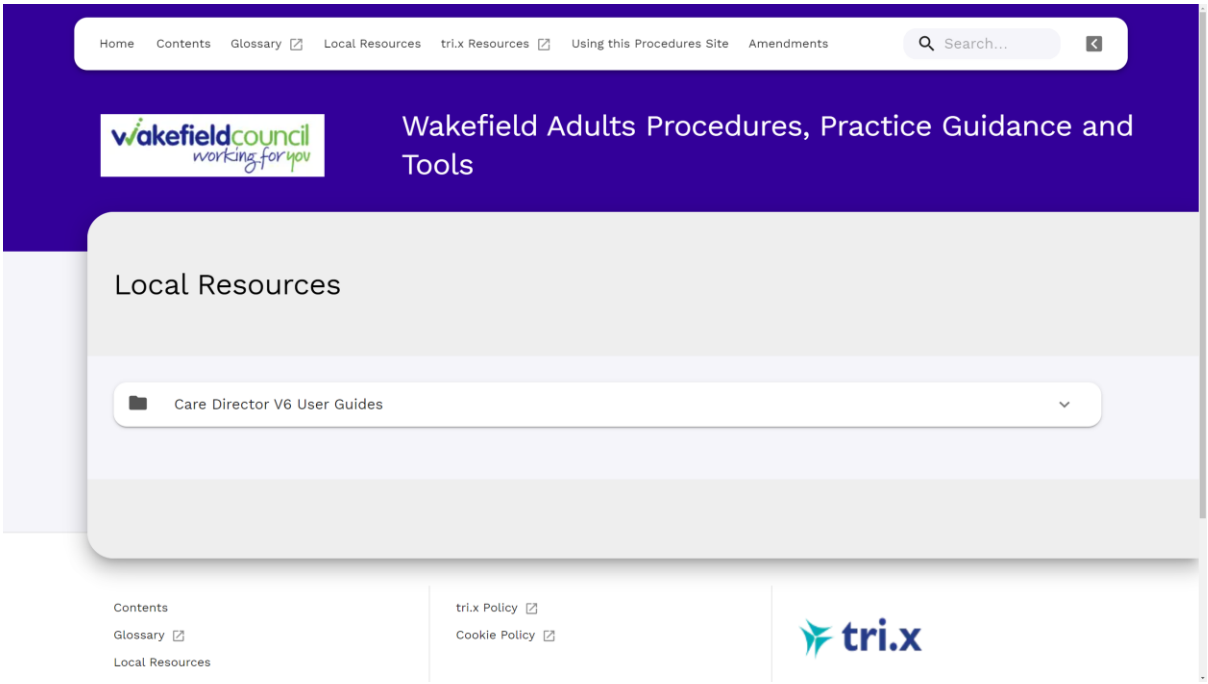
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

2. Go to **Microsoft Edge** and copy and paste this URL:
    a. https://wakefieldadults.proceduresonline.antser.com/

3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	07/10/2022