



Care and Support Commissioning V1.0

Document	CareDirector Care and Support Commissioning.
Purpose	Care and Support Commissioning's daily tasks on CareDirector.
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Owner	ICT Business Transformation Team
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Contents

Guide Information.....	3
Before Live Access... ..	3
Guide Navigation	3
How to search for a Service User.....	5
Updating Person Details	6
How to find Activities	7
How to input an Activity	9
How to change status to Complete (Re-activate Activities)	11
How to tell if an Activity is linked to a Case or Person Record.....	12
How to Allocate a new Activity to another team	13
How to Allocate an existing Activity to another team	15
How to Clone Activities.....	17
How to upload Attachments	18
How to upload multiple attachments.....	20
How to find a Form (Case)	23
How to add a Form	24
How to Allocate a Form	27
How to Clone a Form.....	29
How to reactivate a Closed Form.....	32
How to search for a Provider.....	33
How to set up a new Provider.....	34
How to add a Service Type.....	36
How to see Provider Service Provisions	41
How to see Provider Suspensions	42
How to add a Suspension on a Provider.....	43
Overview of the Quality Assurance	44
Further CareDirector Guidance	45

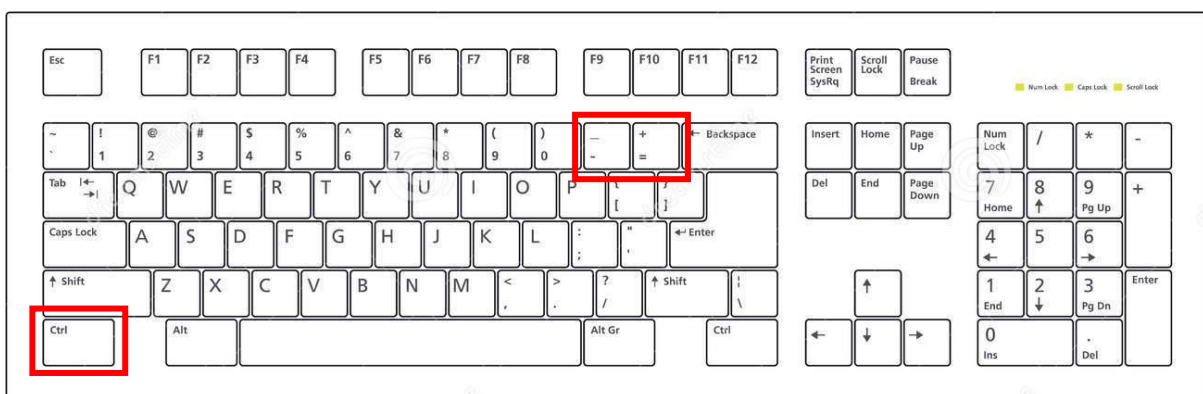
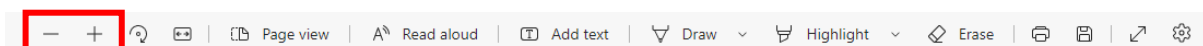
Guide Information

Before Live Access...

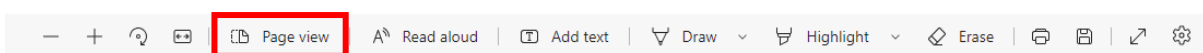
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

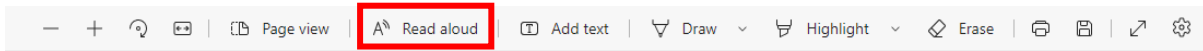
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



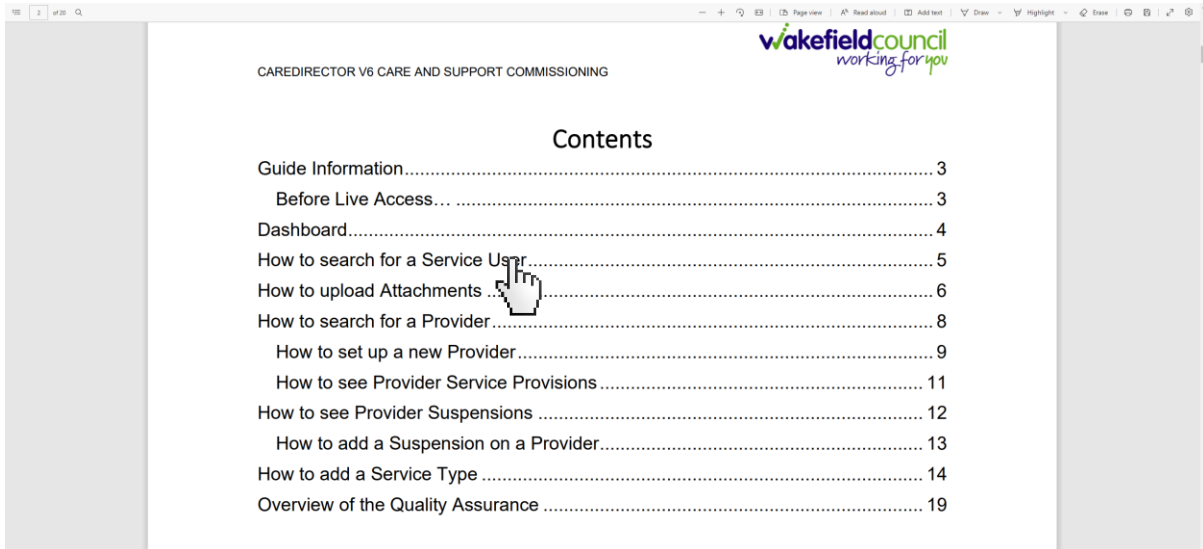
3. To put pages next to one another, select the **Page View** icon on the toolbar.



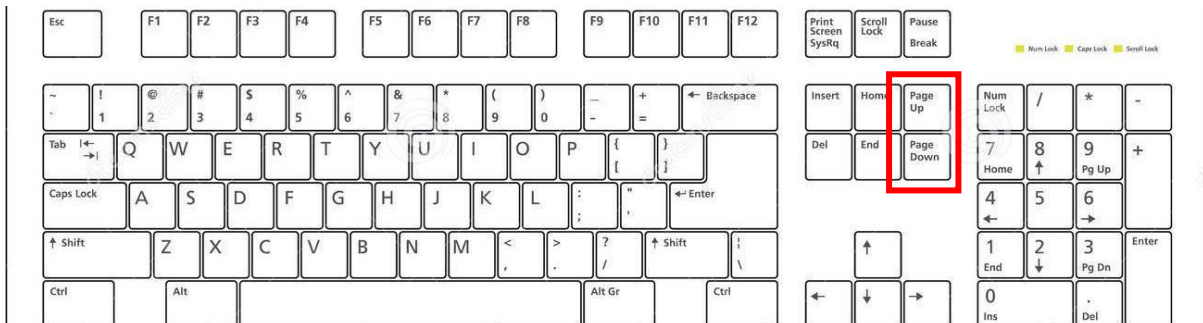
4. For auditory assistance, select **Read Aloud** from the toolbar.



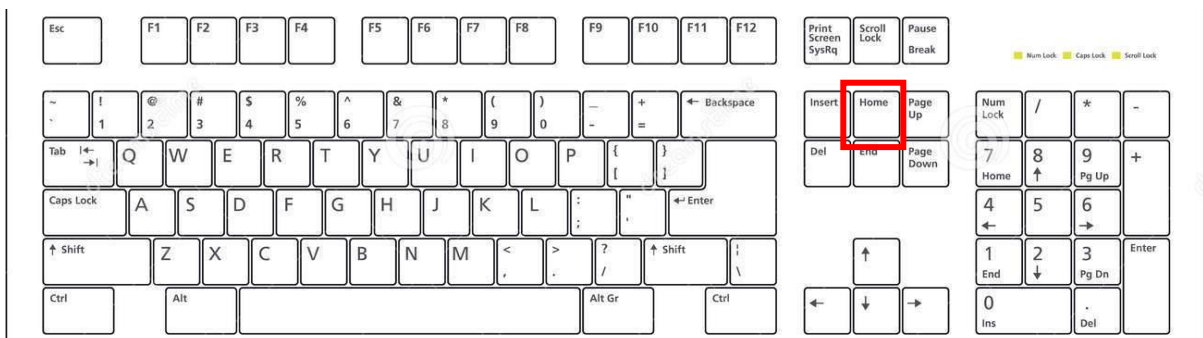
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

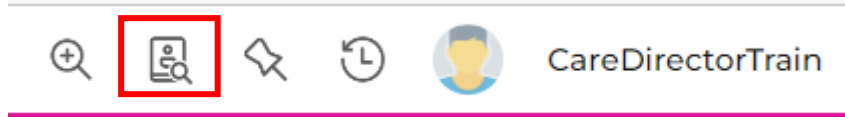


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case) Created', 'Service Provision Created', and 'Task Created'.

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

The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page shows a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no NHS No., Ethnicity, and Marital Status.

How to find Activities

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

My Active Tasks/Notes

Subject	Regarding	Priority	Event Date	Due	Created On	Created By	Modified On
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:40:...	31/10/2022 10:40:...	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:29:11	31/10/2022 10:29:37	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 14:58:...	28/10/2022 14:58:...	Scott Simpson	28/10/2022 14
<input type="checkbox"/> New Occupational Therapy Referral	Occupational Th...			19/10/2022 00:00:...	19/10/2022 11:39:09	Test Adults Triage User	28/10/2022 14
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 13:51:28	28/10/2022 13:51:31	Jayne Mullen	28/10/2022 13

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

Person: Test Tom

TOM,Test (Id: 446229) **Person Record** Born: 03/05/1996 (26 Years) Gender: Male NHS No: [dropdown]

Menu | Timeline | Summary | Profile | Cases | Services | Document View | **All Activities**

All Activities

Keyword: [input]
 Activity Type: All [dropdown]
 Date Type: Created Date [dropdown]
 From: 02/10/2022 [calendar]
 To: 01/11/2022 [calendar]
 Actual End (From): [calendar]

Search

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
<input type="checkbox"/> Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
<input type="checkbox"/> Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
<input type="checkbox"/> Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
<input type="checkbox"/> Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

- 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.

The screenshot shows the 'All Activities' filter panel on the left side of the CareDirector interface. The 'From' date field is highlighted with a red box and a '1' callout. The 'Search' button is highlighted with a red box and a '2' callout.

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

The screenshot shows the 'All Activities' table in the CareDirector interface. The 'Regarding' column is highlighted with a red box.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

How to input an Activity

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

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: [dropdown]

Menu ^ Timeline Details

- Activities
- Appointments
- Case Notes
- Emails
- Letters
- Phone Calls
- Tasks

Related Items

Other information

Responsible User: [input field]

Responsible Team*: AMHP Coordinator [input field]

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

Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]

TOM,TEST (id: 444276) Person Record Born: 24/07/1950 (72 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown] Preferred Name: Tom

Menu v Timeline Details

+ [dropdown] Tasks

Related Records [dropdown] Search for records [input field]

<input type="checkbox"/>	Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CMHT Older People Tea...	

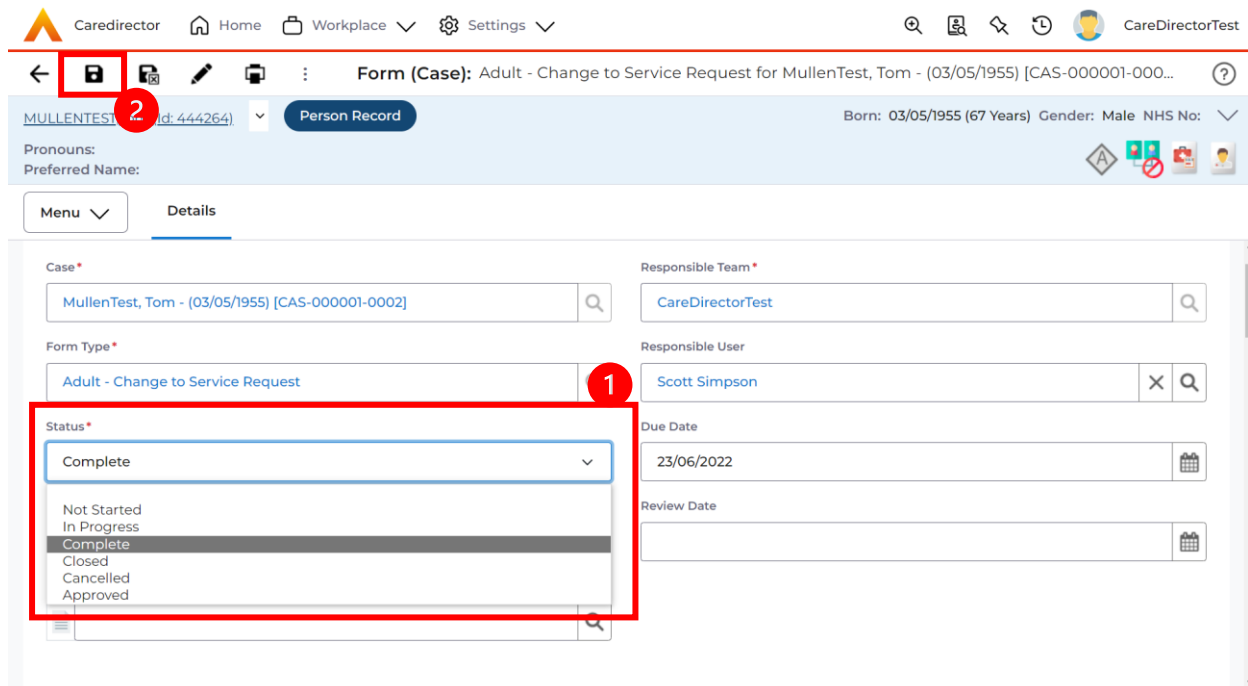
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the 'Case Note (For Case): New' form in the CareDirector system. The form includes several fields: Case, Reason, Priority, Date, Status, Responsible Team, Responsible User, Category, Sub-Category, and Outcome. The 'Responsible User' field is populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' icon in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'.

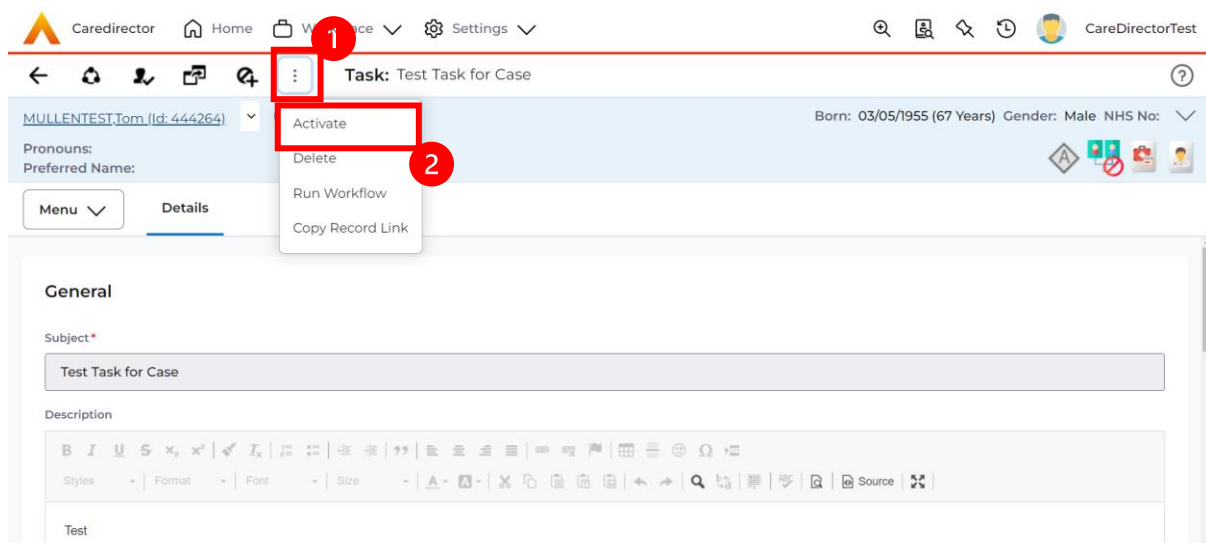
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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**.

The screenshot shows the 'Person Record' details page for 'Tom, TEST'. The 'Regarding' field is highlighted with a red box and a red circle containing the number '1'. The 'Regarding' field contains a folder icon and the text 'Tom, TEST - (24/07/1950) [CAS-000001-0018]'. A second red box and red circle containing the number '2' highlight the 'Regarding' field area.

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**.

The screenshot shows the 'Person Record' details page with a 'View' modal open. The 'Regarding' field is highlighted with a red box and a red circle containing the number '1'. The 'View' modal is open, showing 'Contact Details' for 'Case Tom, TEST - (24/07/1950) [CAS-000001-0018]'. The 'View' button in the modal is highlighted with a red box and a red circle containing the number '2'.

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.

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' as the selected option. Other fields include 'Regarding' (MullenTest_Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'.

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**.

The screenshot shows the 'Task: New' form with a 'Teams' lookup modal open. The modal has three red annotations: 1. 'Enter your search criteria.' 2. The search results table. 3. The 'OK' button. The search results table is as follows:

Name	Business Unit
<input type="checkbox"/> Adults Connecting Care Team West	Adult Services
<input type="checkbox"/> AMHP rota	Adult Services
<input type="checkbox"/> CareDirector	CareDirector
<input type="checkbox"/> Sensory Impairment Team	Adult Services

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.

The screenshot shows the 'Person Record' form in CareDirector. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'MULLENTEST, Tom - (03/05/1995) [id: 446230] > Person Record'. The form itself is titled 'Details' and contains several fields:

- Regarding***: A dropdown menu showing 'MullenTest, Tom - (03/05/1995) [CAS-000001-001]' with an 'X' and a search icon. A red box with the number '2' is around the 'X'.
- Responsible Team***: A dropdown menu showing 'Sensory Impairment Team' with an 'X' and a search icon. A red box with the number '1' is around the search icon.
- Reason**: A text input field with a search icon.
- Responsible User**: A dropdown menu showing 'Scott Simpson' with an 'X' and a search icon. A red box with the number '1' is around the search icon.
- Priority**: A text input field with a search icon.
- Category**: A text input field with a search icon.
- Due***: Two date/time pickers.
- Sub-Category**: A text input field with a search icon.
- Status***: A dropdown menu showing 'Open'.
- Outcome**: A text input field with a search icon.

At the bottom, there are two radio button questions:

- Contains Information Provided By A Third Party?** with options 'Yes' and 'No' (selected).
- Is Case Note?** with options 'Yes' and 'No' (selected).

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**.

The screenshot shows the CareDirector interface for a task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main content area is titled 'Details' and contains several fields:

- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: Scott Simpson. This field has a red box around the 'X' icon and a '1' in a red circle next to it.
- Priority**: (Empty)
- Category**: (Empty)
- Due***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status***: Open
- Outcome**: (Empty)

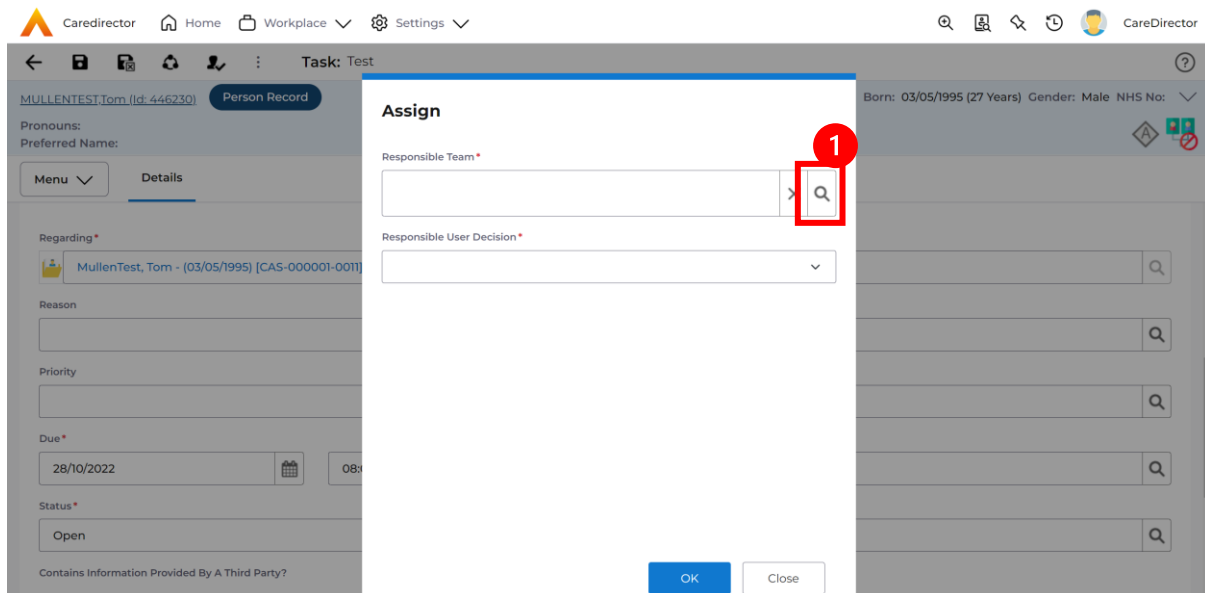
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for a task, similar to the previous one. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main content area is titled 'Details' and contains several fields:

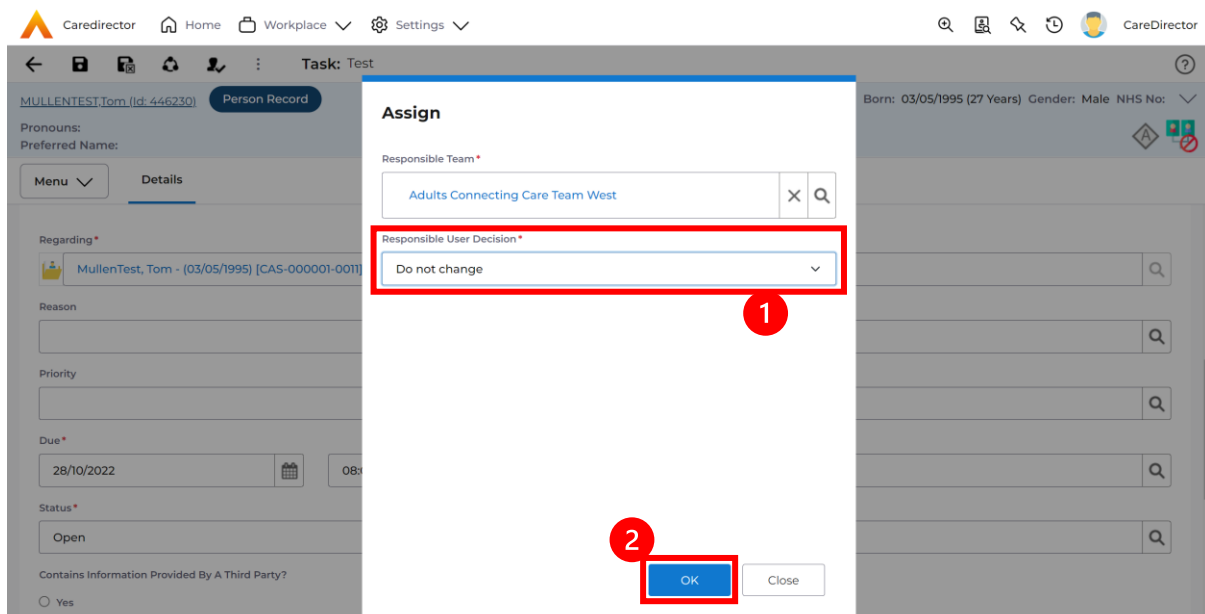
- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: (Empty)
- Priority**: (Empty)
- Category**: (Empty)
- Due***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status***: Open
- Outcome**: (Empty)

The toolbar at the top of the form has a red box around the 'Assign this record to another team' icon (a person with a plus sign) and a '1' in a red circle next to it.

- 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.



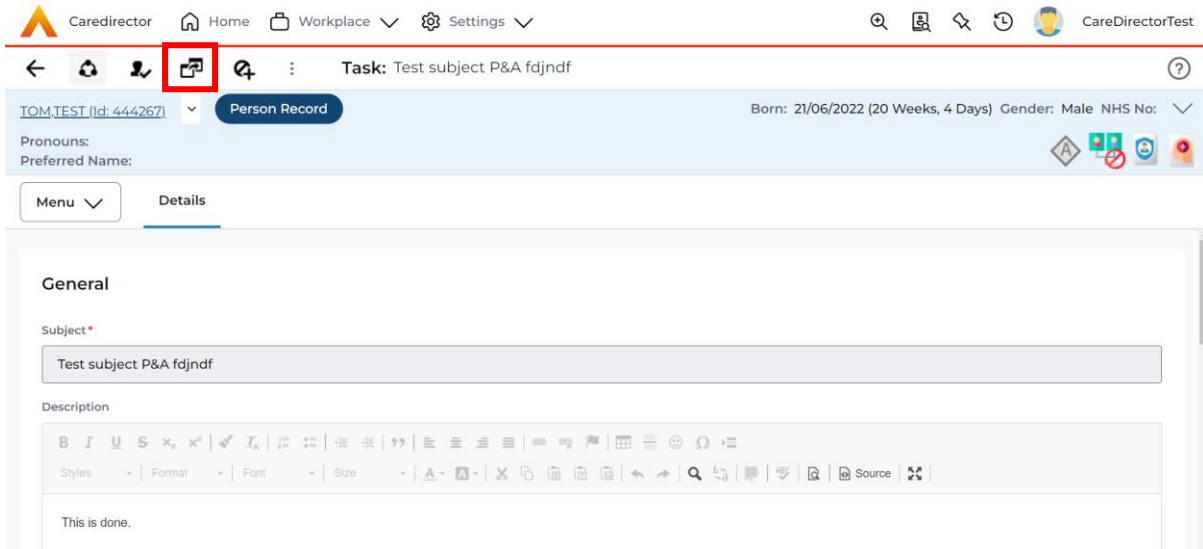
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



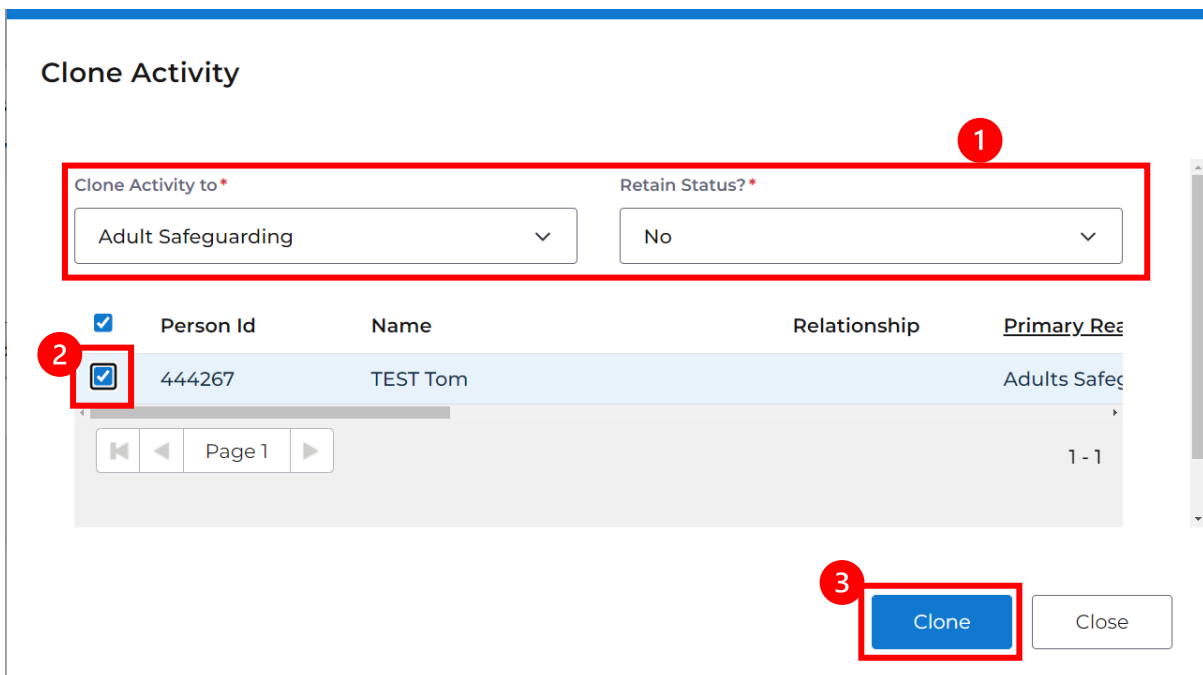
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

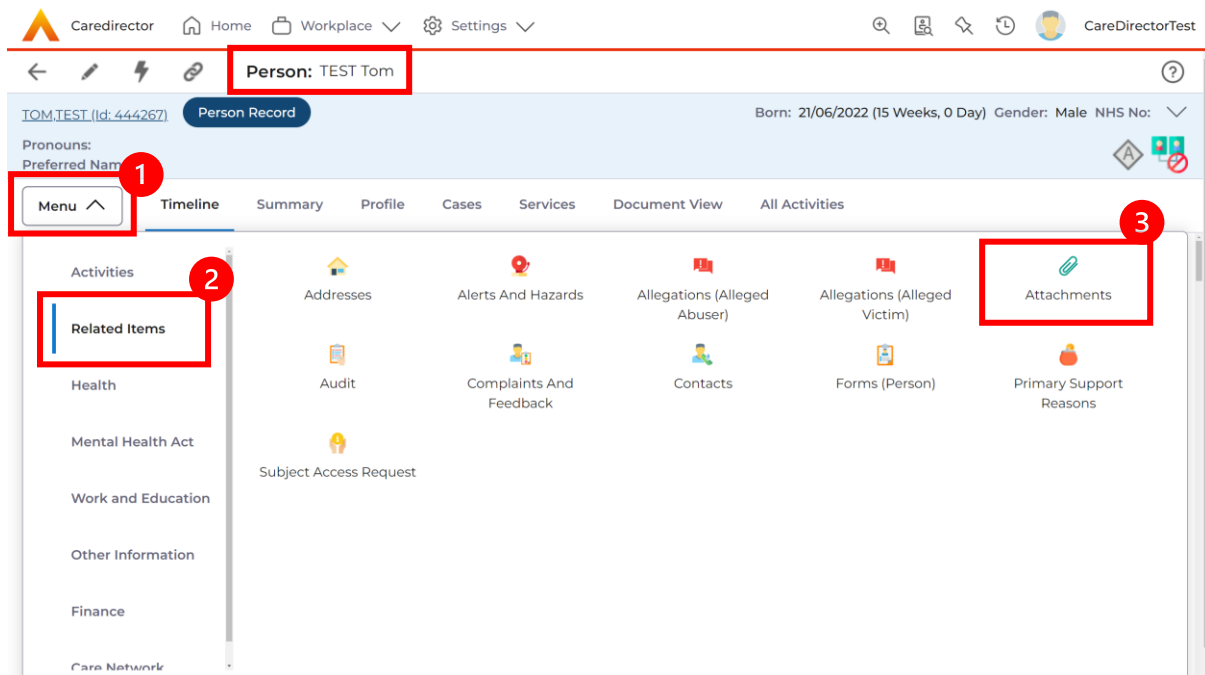


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

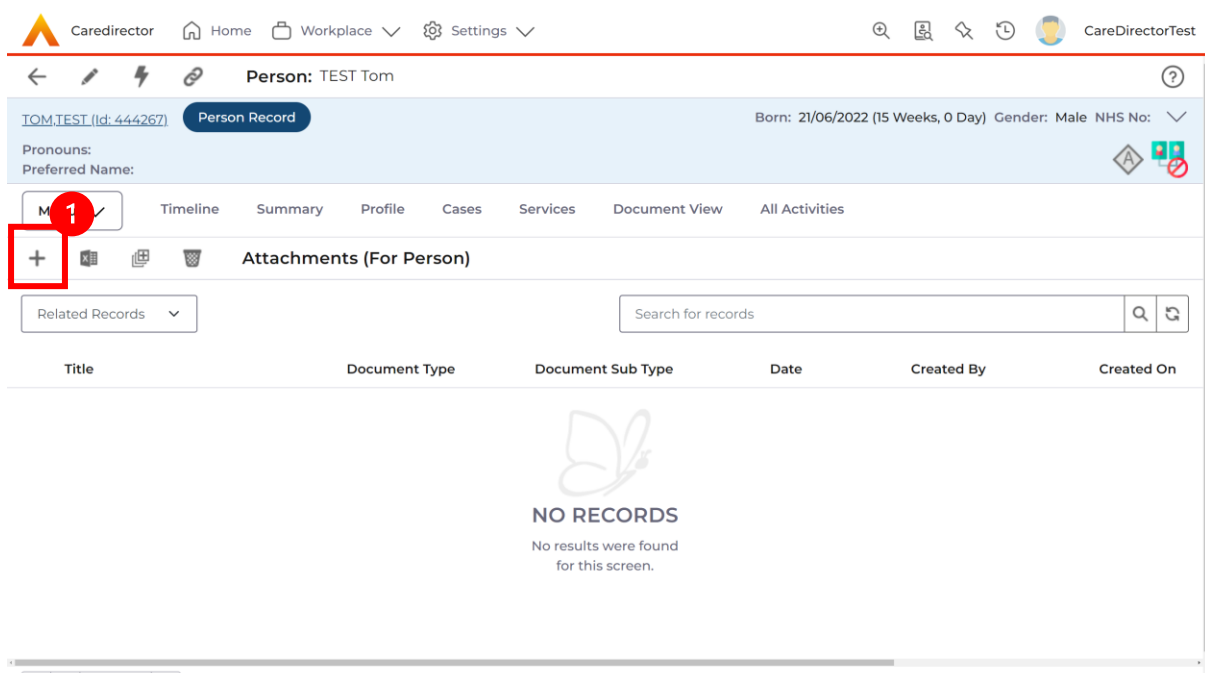


How to upload Attachments

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**.



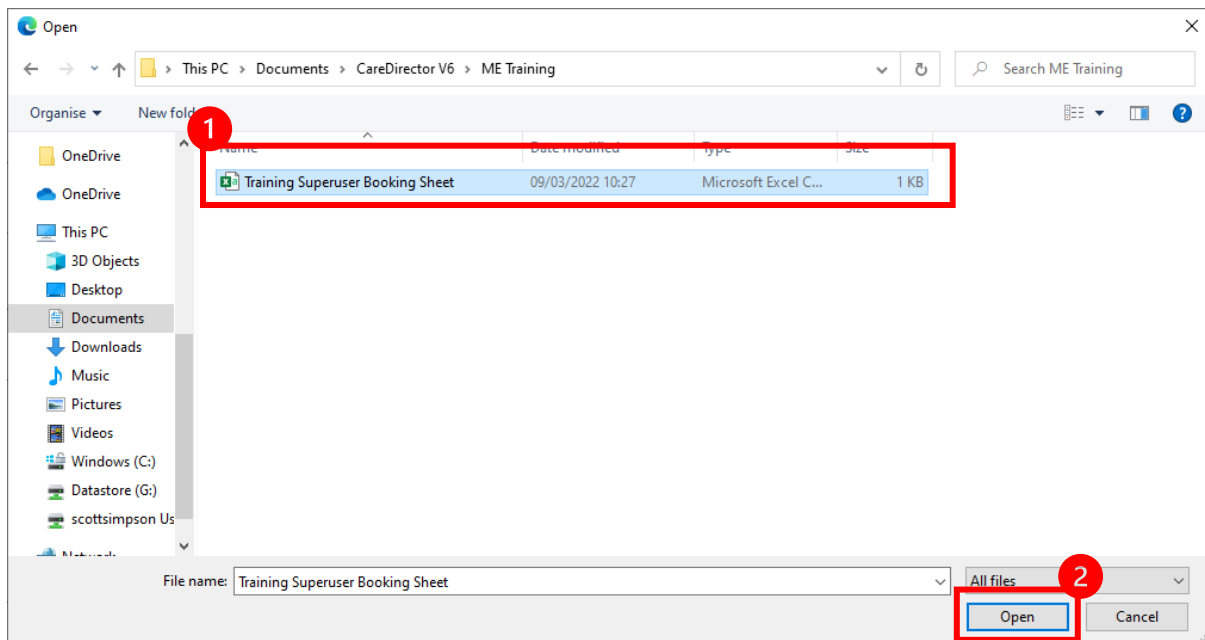
2. When opened, select the **Create New Record** from the toolbar.



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

The screenshot shows the 'Attachment (For Person): New' form in CareDirector. The 'File' field is highlighted with a red box and a red circle containing the number 1. The 'Browse' button is also highlighted with a red box. Other fields include 'Person' (TEST Tom), 'Responsible Team' (CareDirectorTest), 'Title' (Test Document Upload), 'Date' (04/10/2022), 'Document Type' (Clients), and 'Declared' (No).

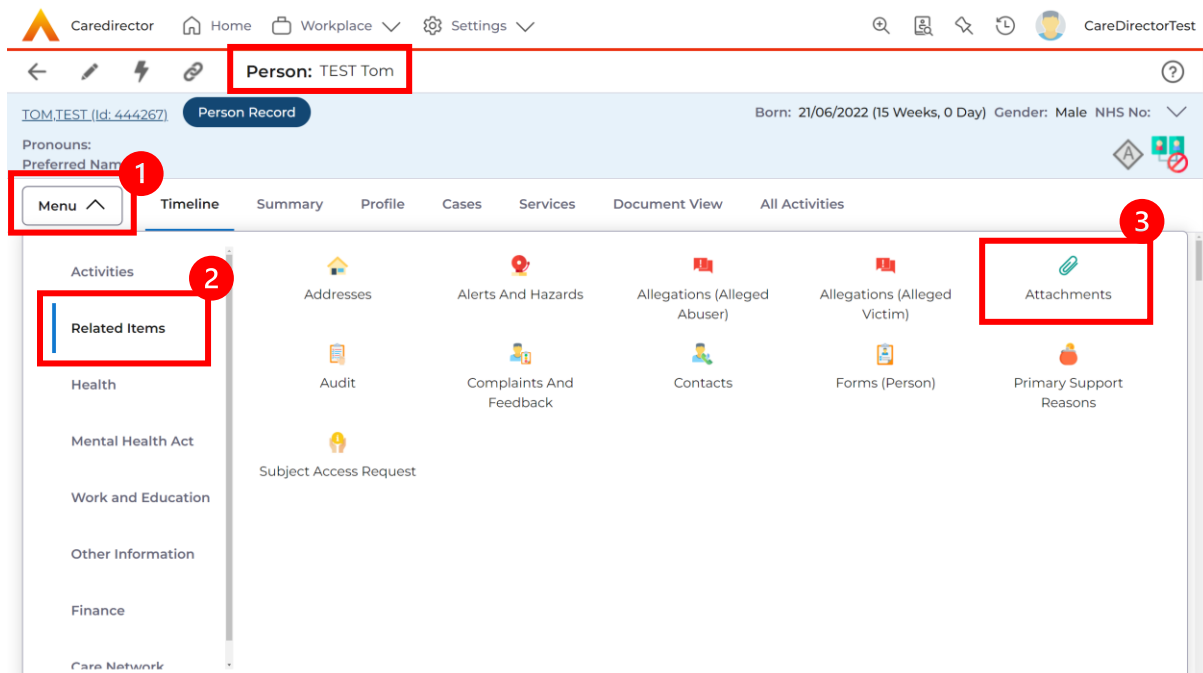
4. Select a **File** from your computer/ SharePoint and select **Open**.



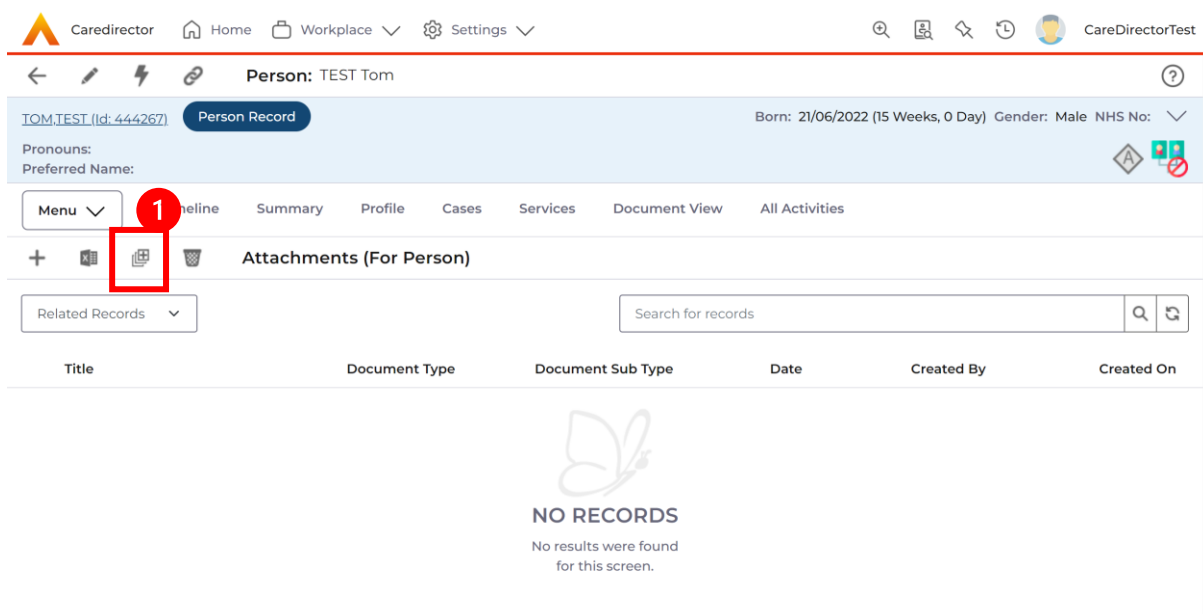
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

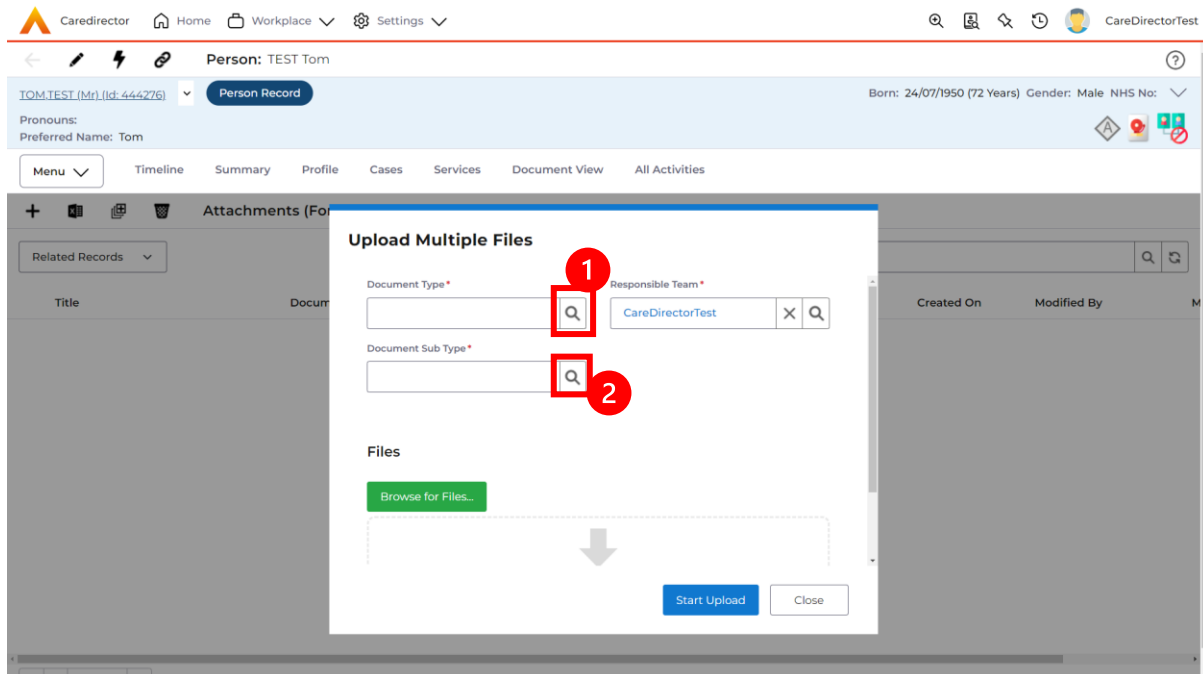
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



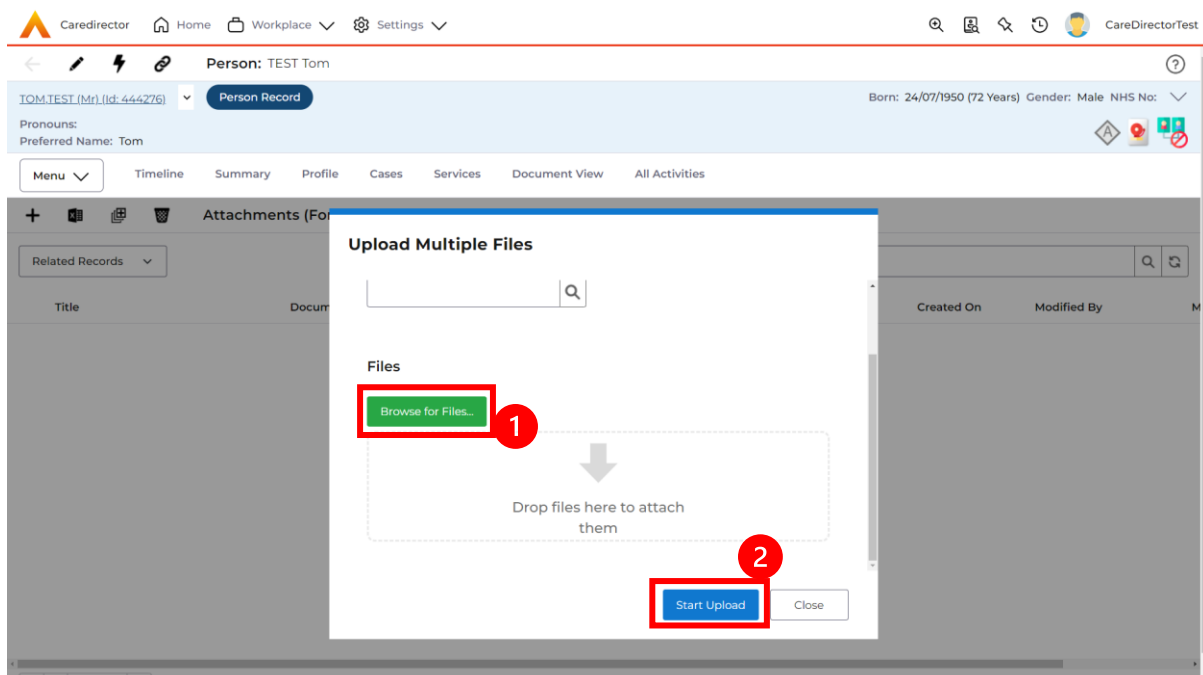
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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



- 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)**.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box and a '1'. The 'Menu' dropdown is highlighted with a red box and a '2'. The 'Related Items' option is highlighted with a red box and a '2'. The 'Forms (Case)' option is highlighted with a red box and a '3'. The main content area shows a timeline of events related to the case, including 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

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

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is visible. The 'Forms (Case)' section is active, showing a table of related records. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The table contains one record: AMHP Report Form, 21/09/2022, In Progress, Scott Simpson, CareDirectorTest.

Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date
	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**.

Person: TEST Tom

TOM TEST (Id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name: [dropdown]

Menu Timeline Summary Profile **Cases** Services Document View All Activities

Related Records Search for records [input] [search] [refresh]

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scott Simpson
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scott Simpson

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

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM TEST (Id: 444267) Person Record Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Pronouns: Preferred Name: [dropdown]

Menu ^ Timeline Details

Activities Actions Adult Safeguarding Attachments Audit Deprivations Of Liberty **Forms (Case)** Involvements

Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

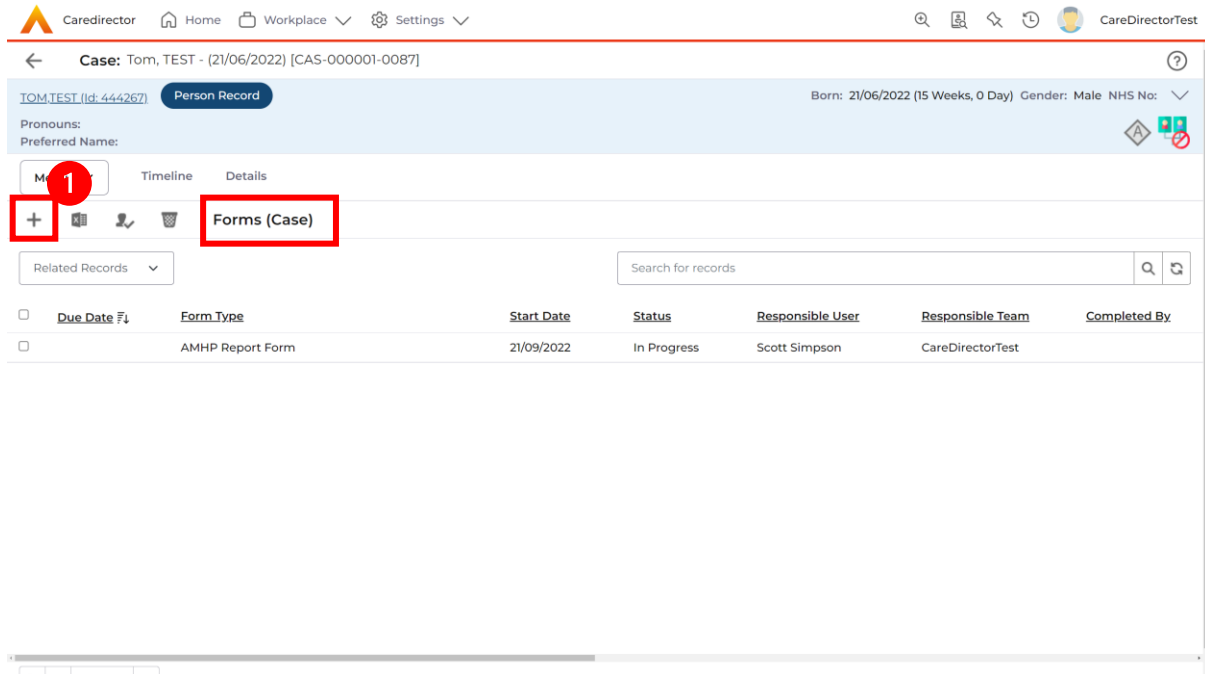
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

Due Date: Form Type: AMHP Report Form Status: In Progress

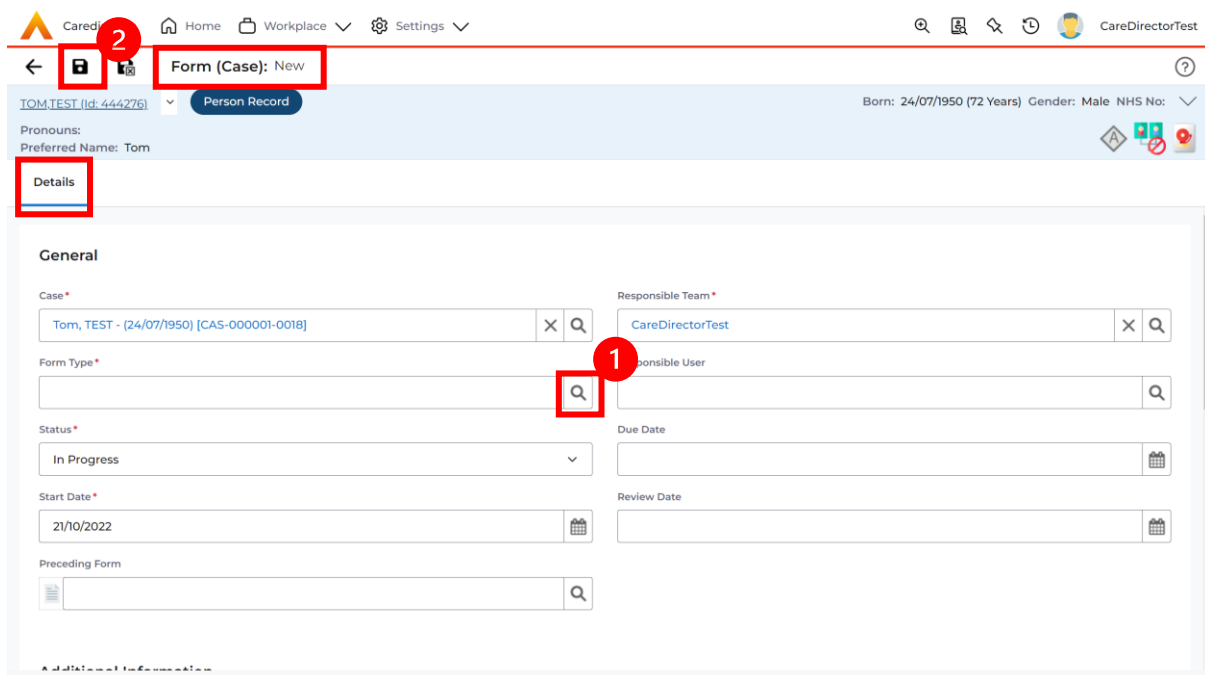
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational 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)**.



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.

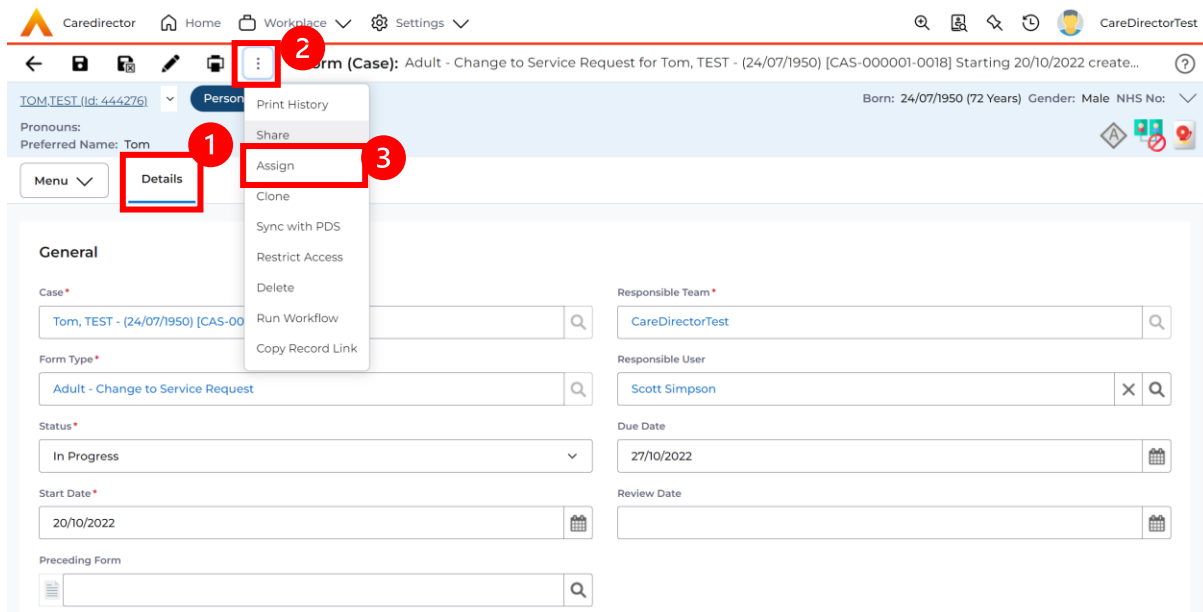
The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The toolbar at the top contains several icons, with the "Edit" icon (a pencil) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022", and gender "Male". The main content area is titled "General" and contains several form fields: "Case" (Tom, TEST - (21/06/2022) [CAS-00001-0087]), "Form Type" (AMHP Report Form), "Status" (In Progress), "Start Date" (21/09/2022), "Responsible Team" (CareDirectorTest), "Responsible User" (Scott Simpson), "Due Date", and "Review Date".

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

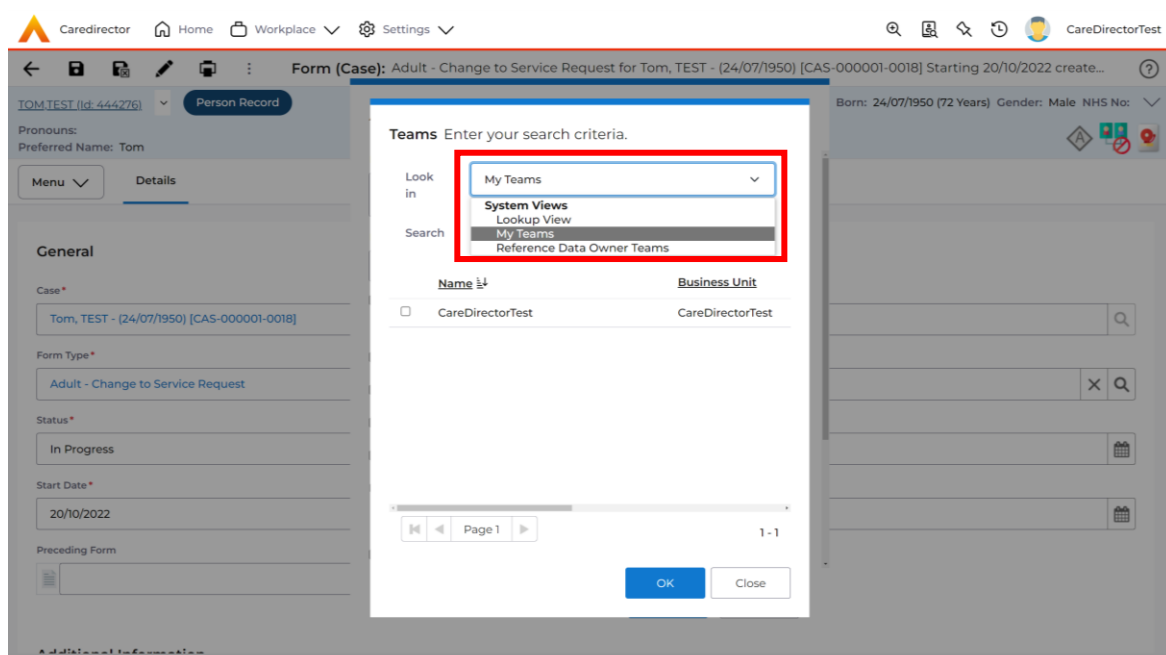
The screenshot shows the CareDirector interface for the "AMHP Report Form". The toolbar at the top contains several icons, with the "Save" icon (a floppy disk) highlighted by a red circle and the number "1". Below the toolbar, the case details are displayed, including the person's name "TOM,TEST (Id: 444267)", birth date "21/06/2022", and gender "Male". The main content area is titled "AMHP Report Form" and contains several sections: "Service User Details", "Referral Details", "Further Details", "Background Information", and "AMHP'S Assessment of th...". The "Client previously known to services?" section has radio buttons for "Yes" and "No". The "Ethnic Origin" section has a list of options with radio buttons: "White - British / Northern Irish", "White - Irish", "White - Gypsy or Irish Traveller", "White - Eastern European", "Mixed - White and Black African", "Mixed - White and Black Caribbean", "Mixed - White and Asian", and "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.



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**.

The screenshot shows the 'Assign' dialog box in the CareDirector system. The dialog is titled 'Assign' and contains the following fields and options:

- Responsible Team ***: Accommodation Team
- Responsible User Decision ***: Clear on current record only
- Include Inactive?**:
- Related Records to Include**:
 - Check/Uncheck All
 - Appointment
 - Assessment Factor
 - Attachment (Case Form)
 - Email
 - Email Attachment

The 'OK' button is highlighted with a red box, indicating the final step in the process.

How to Clone a Form

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

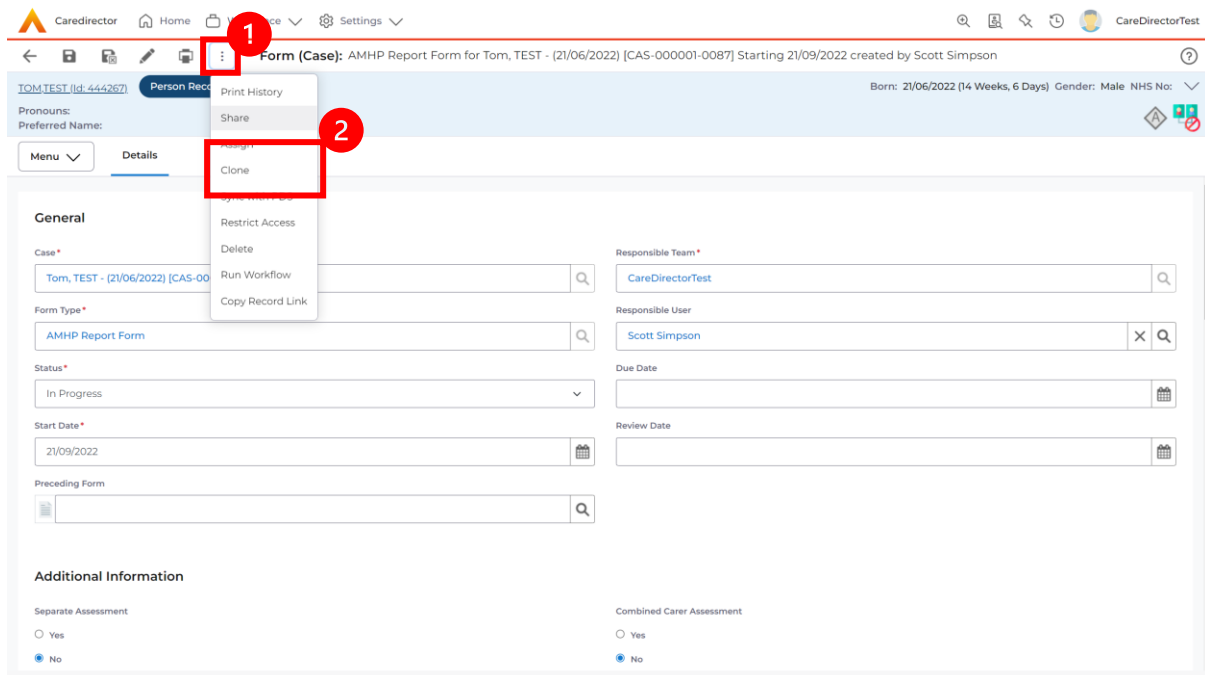
The screenshot shows the CareDirector interface for a case record. The breadcrumb navigation at the top indicates the current case: "Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]". Below this, the "Menu" dropdown is open, and the "Related Items" option is selected. The "Forms (Case)" option is highlighted with a red box and a red circle with the number 3. The main content area displays a timeline of events related to the case, including "Form (Case) Created", "Case Involvement Updated", and "Case Involvement Created".

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

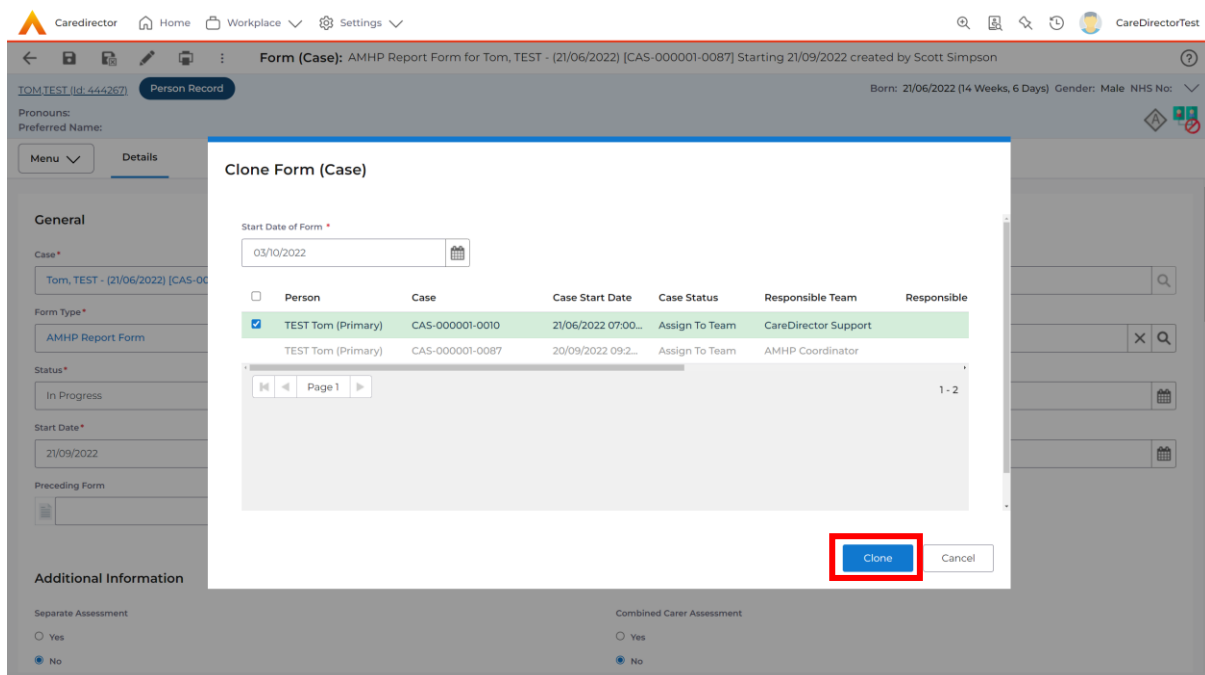
The screenshot shows the CareDirector interface for the same case record. The "Forms (Case)" menu option is selected, and a table of related records is displayed. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The table contains one record for an AMHP Report Form.

Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest		

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 checked, select **Clone**.



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**.

The screenshot shows the 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...' page in the CareDirector system. The user is logged in as 'CD V6 Team'. The form details are as follows:

Field	Value
Case*	Tom, TEST - (21/06/2022) [CAS-000001-0087]
Form Type*	Adult Care and Support Plan
Status*	Closed
Start Date*	09/11/2022
Preceding Form	
Responsible Team*	CareDirectorTest
Responsible User	Scott Simpson
Due Date	11/11/2022
Review Date	
Completed By*	Scott Simpson
Completion Date*	09/11/2022
Signed Off By*	Scott Simpson
Signed Off Date*	09/11/2022

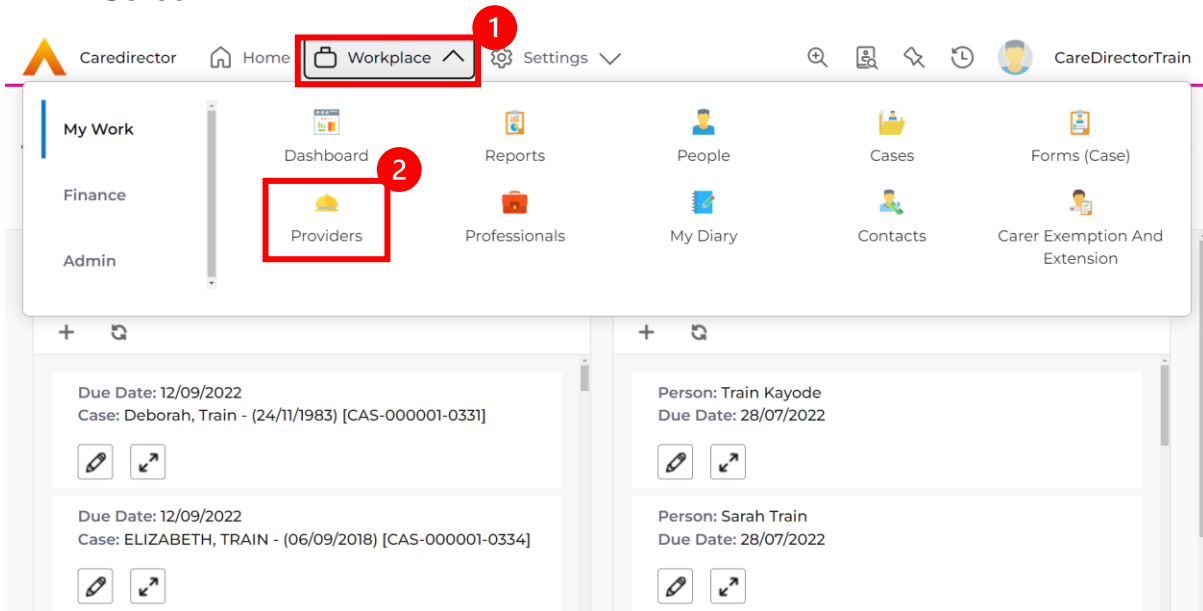
How to reactivate a Closed Form

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

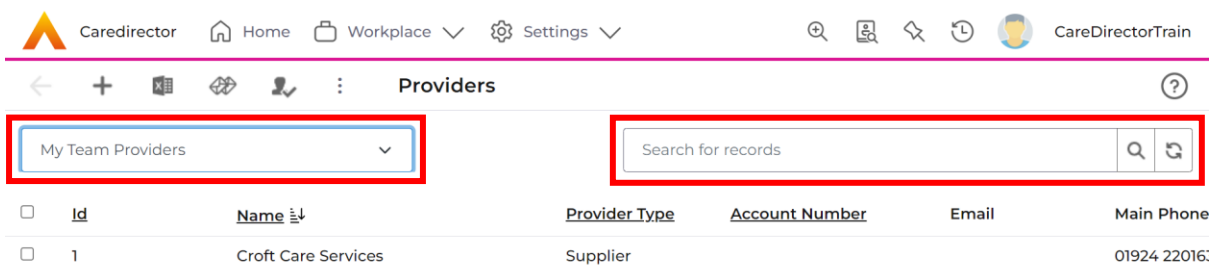
2. Select the **Three Dots** and select **Activate**.

How to search for a Provider

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

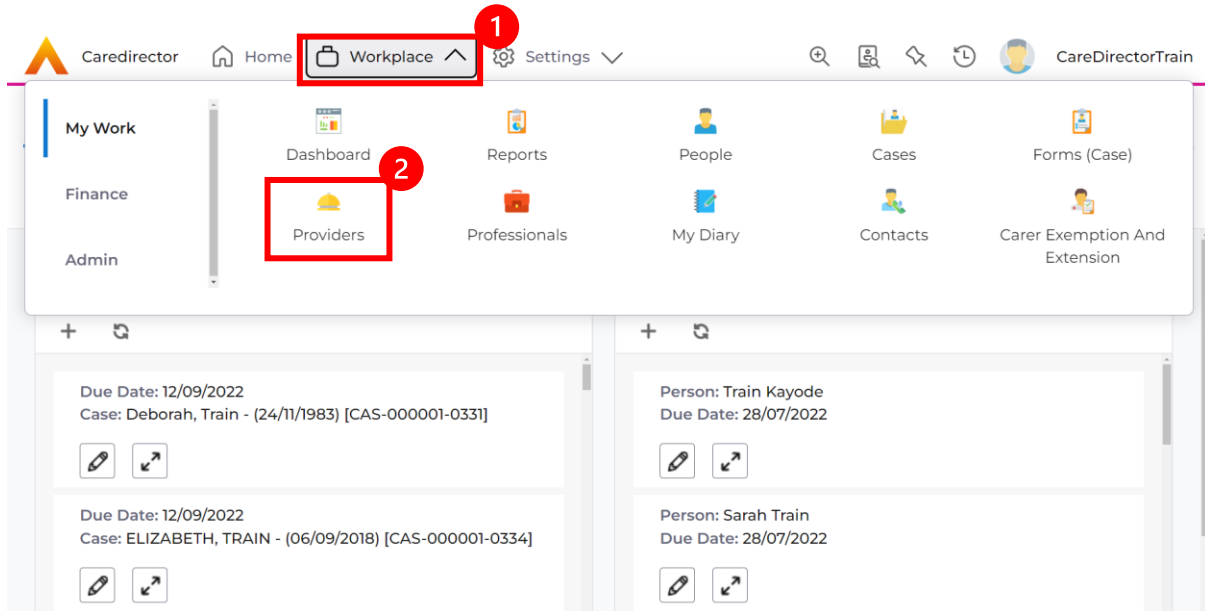


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

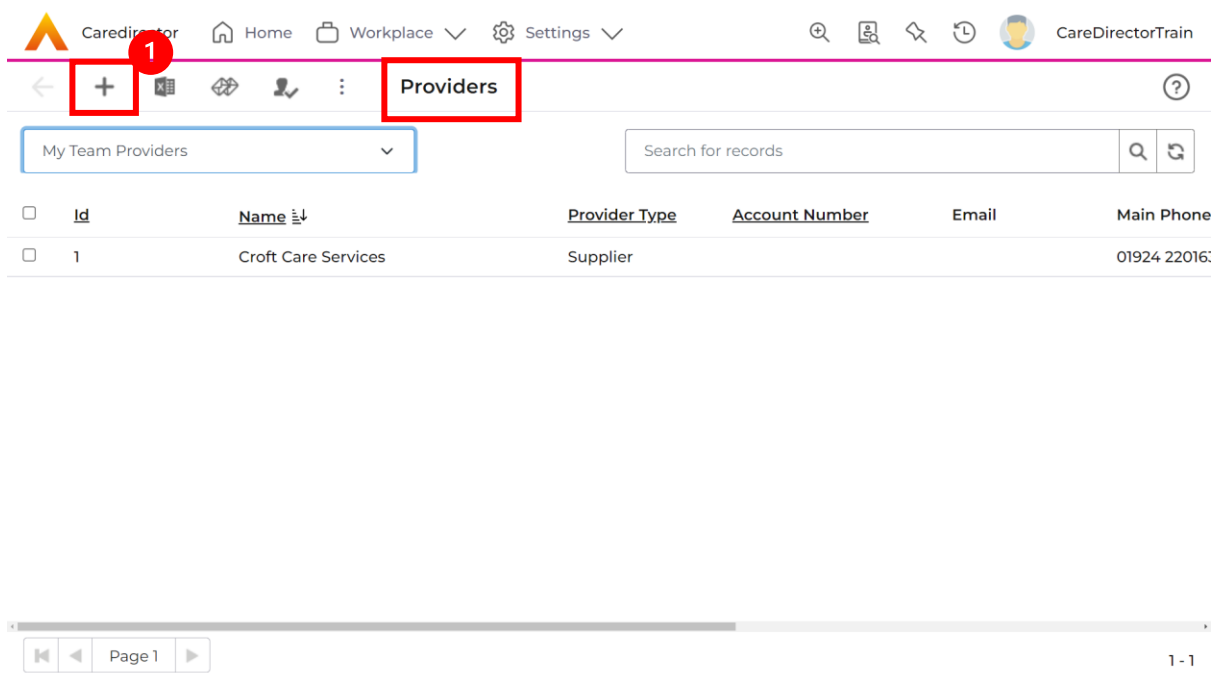


How to set up a new Provider

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.

The screenshot shows the 'Provider: New' form in the CareDirector application. The toolbar at the top contains a back arrow, a save icon (highlighted with a red box), a print icon, and the text 'Provider: New'. The form fields are as follows:

- Id ***: A text input field.
- Responsible Team ***: A dropdown menu with 'CareDirectorTrain' selected.
- Name ***: A text input field containing 'New provider'.
- Start Date**: A date picker field.
- Provider Type ***: A dropdown menu with 'Agency' selected.
- End Date**: A date picker field.
- Account Number**: A text input field.
- Parent Provider**: A text input field with a search icon.

How to add a Service Type

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

The screenshot shows the CareDirector interface for a provider named '1 HILL CLOSE'. The 'Services Provided' tab is selected. A table of related records is visible below the toolbar. The toolbar contains a '+' icon for creating a new record, which is highlighted with a red box and a circled '2'. The 'Services Provided' tab is highlighted with a red box and a circled '1'.

Id	Provider	Id	Approval Status	Service Element 1	Service Element 2	Service Element 3	Client Category	Contract Type	Current Ranking	Negotiated Rate	GLC
186414	1 HILL CLOSE	30047	Approved	Adult Residential...	Long-Term Care		Learning Disabili...	Spot		No	
186414	1 HILL CLOSE	31400	Approved	Adult Residential...	Long-Term Care		Older People Le...	Spot		No	

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

The screenshot shows the 'Service Provided: New' creation screen. The 'General' tab is selected. The form contains several fields for mandatory information, including Provider, Service Element 1, Service Element 3, Contract Type, Responsible Team, Responsible User, Approval Status, Id, Client Category, and Current Ranking. The 'Save' icon in the toolbar is highlighted with a red box and a circled '1'.

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**.

The screenshot shows the 'Service Provided Rate Periods' screen. The 'Rate Periods' tab is selected. The toolbar contains a '+' icon for creating a new record, which is highlighted with a red box and a circled '2'. The 'Rate Periods' tab is highlighted with a red box and a circled '1'.

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


The screenshot shows the 'Service Provided Rate Period: New' form in the CareDirector system. The 'General' tab is active and highlighted with a red box and a '1'. The form contains the following fields:

- Service Provided*:** Test Provider \ SDS - Managed Account \ Home Care \ \ \ Spot
- Responsible Team*:** CareDirectorTest
- Rate Unit*:** Per Week Pro Rata
- Approval Status*:** Pending
- Start Date*:** 11/10/2022
- End Date:** (empty)

The 'Save' icon in the top toolbar is highlighted with a red box and a '2'.

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

The screenshot shows the 'Service Provided Rate Schedules' page in the CareDirector system. The 'Rate Schedules' tab is active and highlighted with a red box and a '1'. The page displays a table with the following columns:

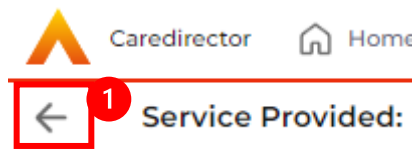
Service Provide...	Rate	Rate Bank Holid...	Rate Per Unit	Time Band Start	Time Band End	Monday	Tuesday	Wednesday	Thursday	Friday
 NO RECORDS No results were found for this screen.										

The 'Create New Record' icon in the top toolbar is highlighted with a red box and a '2'.

- 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.

The screenshot shows the 'Service Provided Rate Schedule: New' form. The 'Rate' field is highlighted with a red box and a '2' callout. The 'Service Provided' dropdown is highlighted with a red box and a '1' callout. The form includes fields for 'Service Provided Rate Period', 'Responsible Team', and 'Notes'.

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



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

The screenshot shows the 'Service Provided: Test Provider \ SDS - Managed Account \ Home Care \ \ Spot' page. The 'Service Finance Settings' tab is highlighted with a red box and a '1' callout. The 'Create New Record' button is highlighted with a red box and a '2' callout. The page includes a search bar and a table with columns for 'Service Provided', 'Start Date', 'End Date', 'Payment Type', 'Provider Batch ...', 'VAT Code', 'Adjusted Days', 'Aggregate on In...', 'End Reason Ru...', and 'Used in Batch S...'.

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

The screenshot shows the 'Service Finance Setting: New' form. The 'Details' tab is selected and highlighted with a red circle and box labeled '1'. The 'Service Provided' field is highlighted with a red box and labeled '2'. Other fields include 'Responsible Team', 'Start Date', 'End Date', 'Payment Type', 'Provider Batch Grouping', 'VAT Code', 'Adjusted Days', 'Charge Using Number of Carers?', 'End Reason Rules Apply', and 'VAT apply to Charging?'. The 'Notes' section is empty.

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.

The screenshot shows the 'Service Provided: Test Provider \ SDS - Managed Account \ Home Care \ \ Spot' page. The 'Rate Periods' tab is selected and highlighted with a red box and labeled '1'. A dropdown menu is open, showing 'Pending Rate Periods' selected and highlighted with a red box and labeled '2'. The table below shows a list of rate periods.

System Views	Status	Start Date	End Date	Capacity	Capacity Can Be...	Service Provided
Pending Rate Periods		11/10/2022			No	Test Provider \ SDS - Managed Accou...

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

The screenshot shows the 'Service Provided' record for 'Test Provider \ SDS - Managed Account \ Home Care \ \ Spot'. The 'Rate Periods' tab is selected. A dropdown menu is open, showing 'Pending Rate Periods'. Below, a table lists rate periods with columns for Rate Unit, Approval Status, Start Date, End Date, Capacity, Capacity Can Be, and Service Provided. One row is highlighted with a red box, showing 'Per Week Pro Ra...' with an 'Approval Status' of 'Pending'.

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

The screenshot shows the 'Details' view of a 'Service Provided Rate Period' for 'Test Provider \ Test Provider \ SDS - Managed Account \ Home Care \ \ Spot \ Per Week Pro Rata \ 11 Oct 2022'. The 'Approval Status' dropdown menu is open, showing 'Pending' as the selected option. Other fields include 'Service Provided', 'Rate Unit', 'Start Date', 'Responsible Team', and metadata like 'CREATED BY' and 'MODIFIED BY'.

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.

The screenshot shows the Care Director interface for a provider named 'Test Provider'. The breadcrumb navigation shows 'Provider: Test Provider'. Below this, there are several tabs: 'Timeline', 'Summary', 'Details', 'Service Provisions', 'Services Provided', 'Suspensions', 'Service Delivery Variations', and 'Finance Transactions'. The 'Service Provisions' tab is selected and highlighted with a red box and a red circle containing the number 1. Below the tabs, there is a table of service provisions with columns for Id, Person, Id (Person), Status, Planned Start Date, Planned End Date, Actual Start Date, Actual End Date, and Service Element 1. The table contains three rows of data.

Id	Person	Id (Person)	Status	Planned Start Date	Planned End Date	Actual Start Date	Actual End Date	Service Element 1
220075	Test Tester	444265	Ready for Autho...			20/09/2022		SDS - Managed Account
220072	Test Tester	444265	Draft			12/09/2022		SDS - Managed Account
220071	Test Tester	444265	Authorised			14/09/2022		SDS - Managed Account

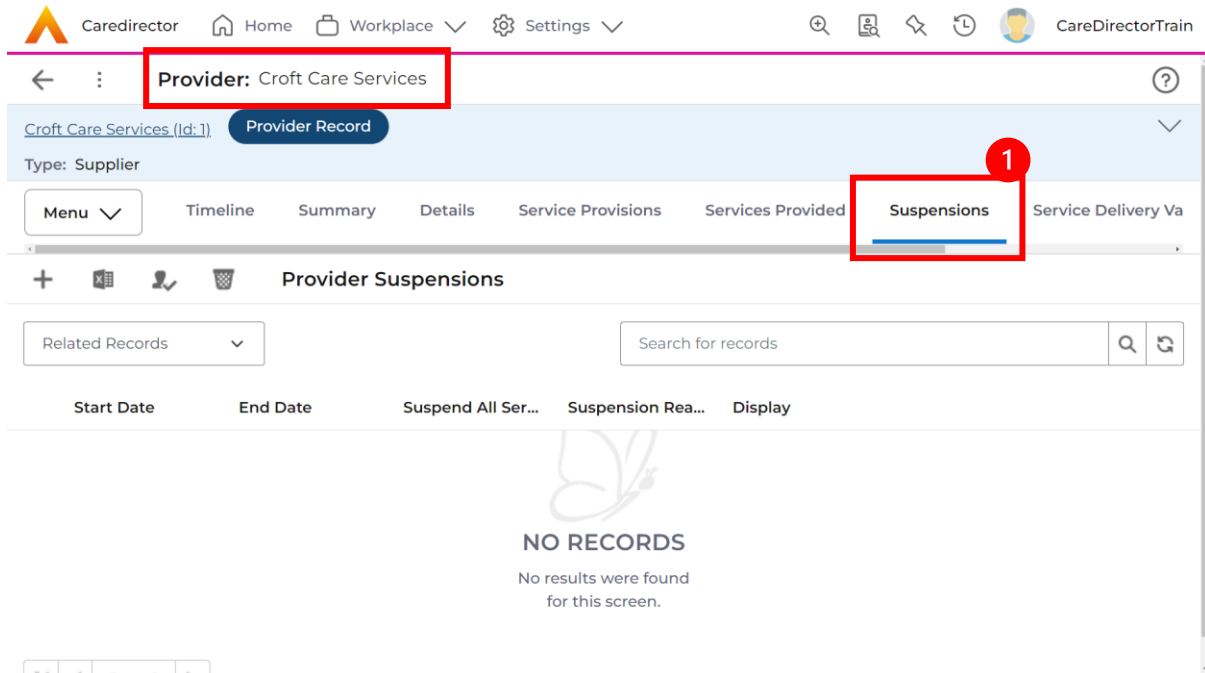
2. This will show information based around the **Service Provisions** that are undergoing under this **Provider**. Scroll across this page to see information based on the headings. Select a **Service Provision** to see more.

This screenshot is identical to the one above, showing the 'Service Provisions' tab selected. A red box highlights the table of service provisions, which contains the following data:

Id	Person	Id (Person)	Status	Planned Start Date	Planned End Date	Actual Start Date	Actual End Date	Service Element 1
220075	Test Tester	444265	Ready for Autho...			20/09/2022		SDS - Managed Account
220072	Test Tester	444265	Draft			12/09/2022		SDS - Managed Account
220071	Test Tester	444265	Authorised			14/09/2022		SDS - Managed Account

How to see Provider Suspensions

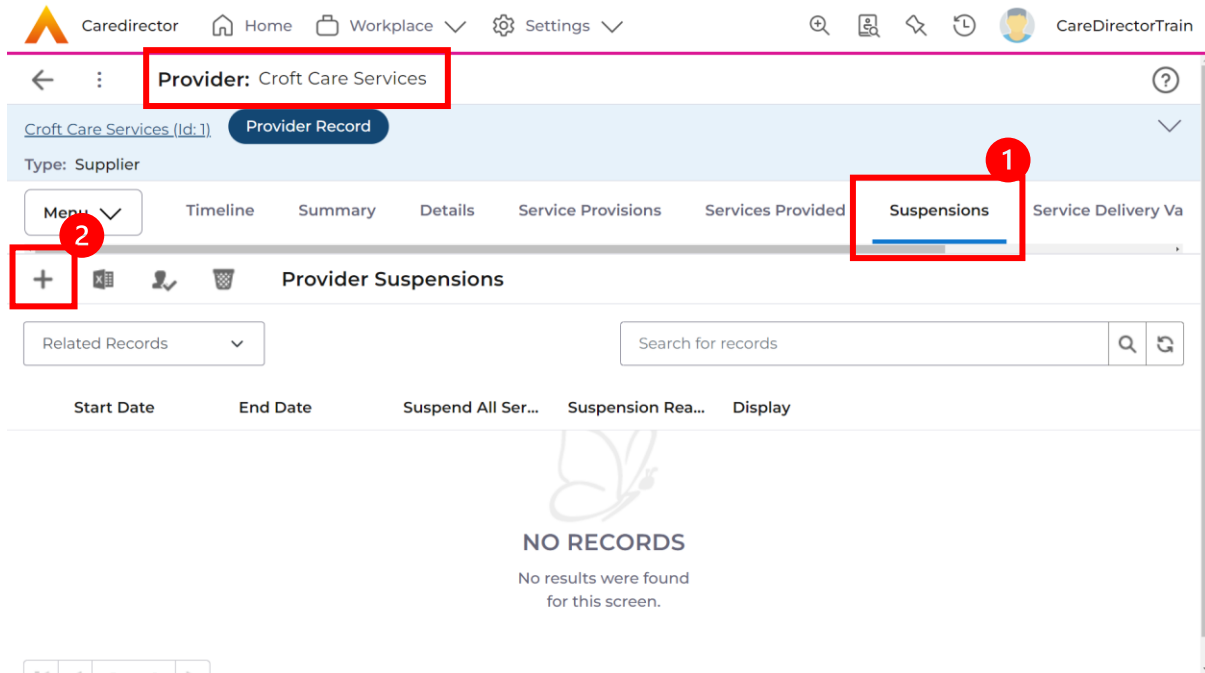
1. Locate the relevant **Provider**. Once on the **Provider** screen, select the **Suspensions** tab.



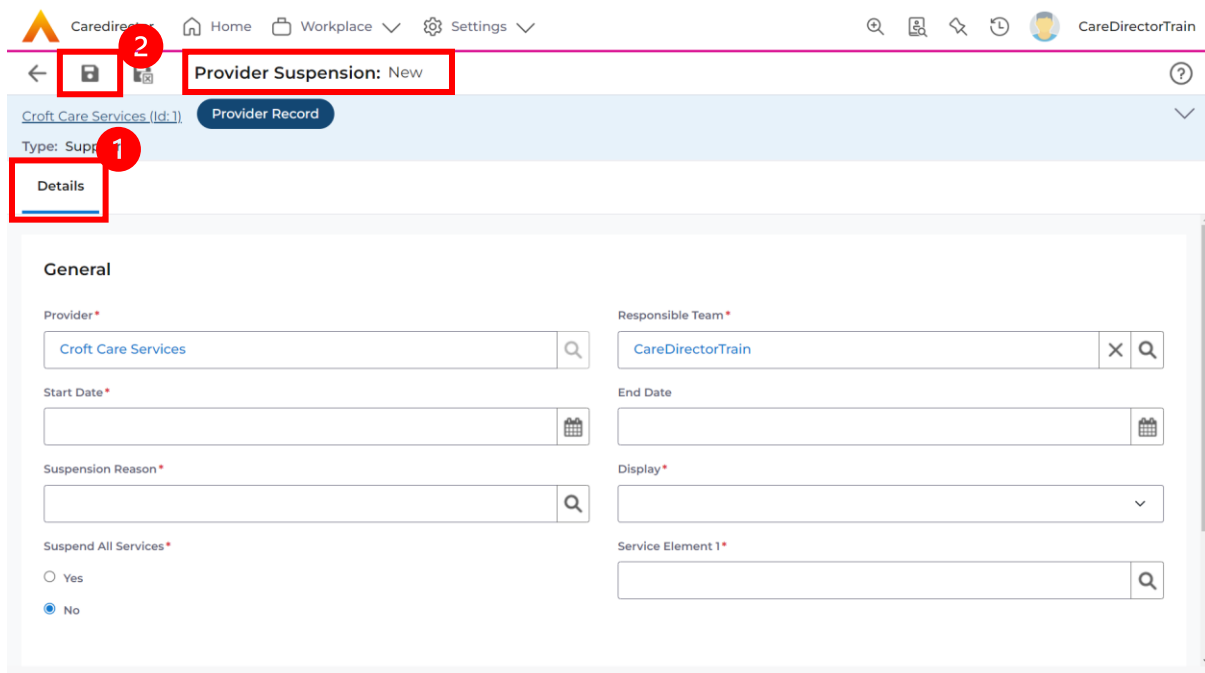
2. This will show a list of all **Suspensions** occurred on the **Provider**.

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.

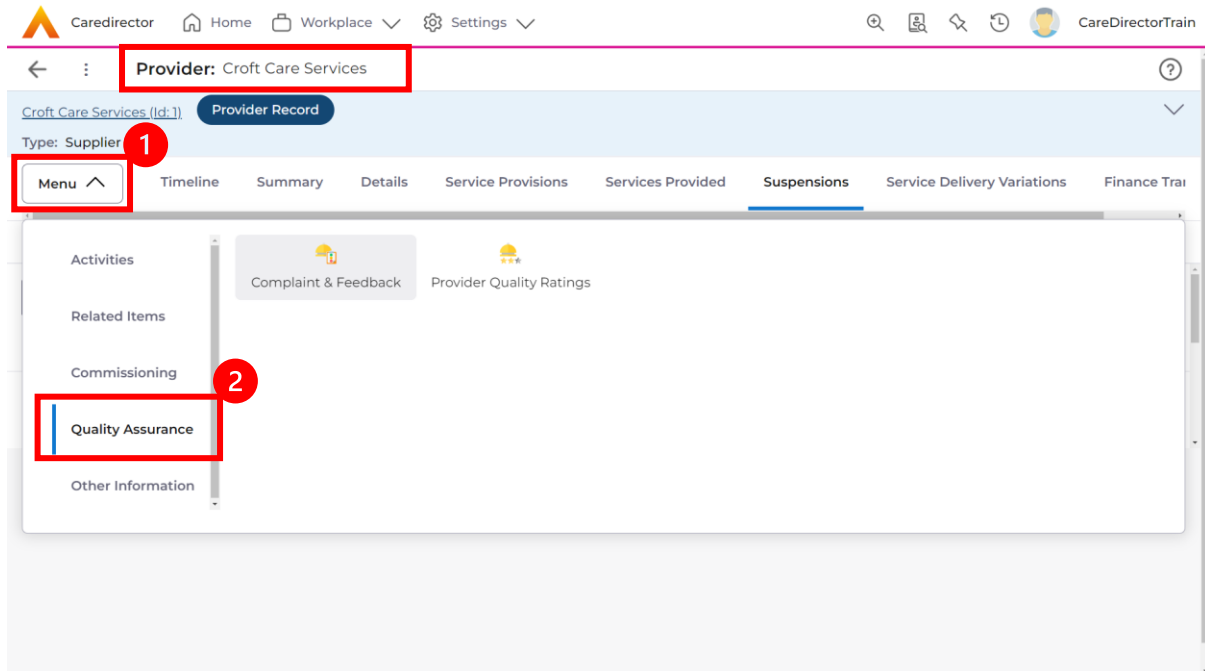


2. This will open the **Suspension** creation screen. Fill in the mandatory fields and select **Save** from the toolbar when done.



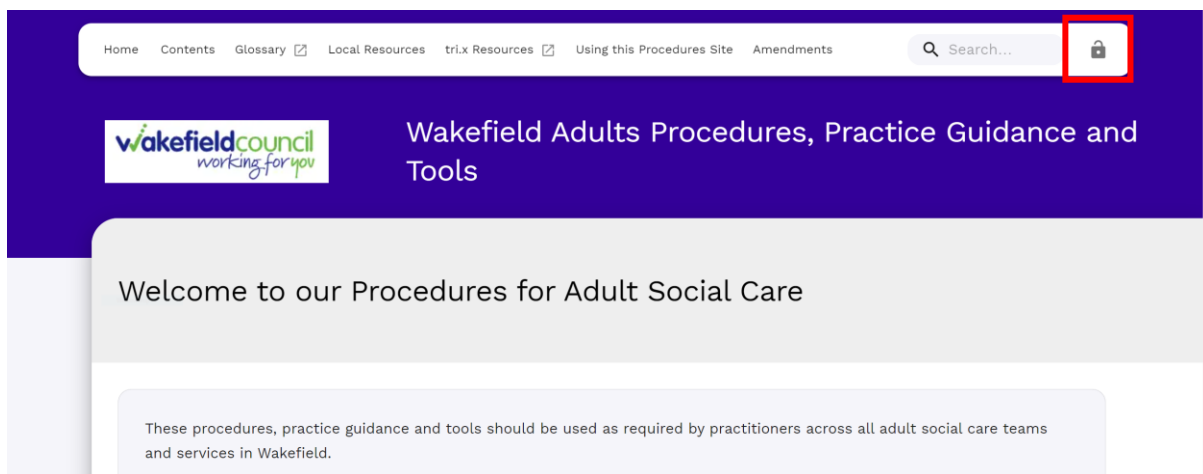
Overview of the Quality Assurance

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

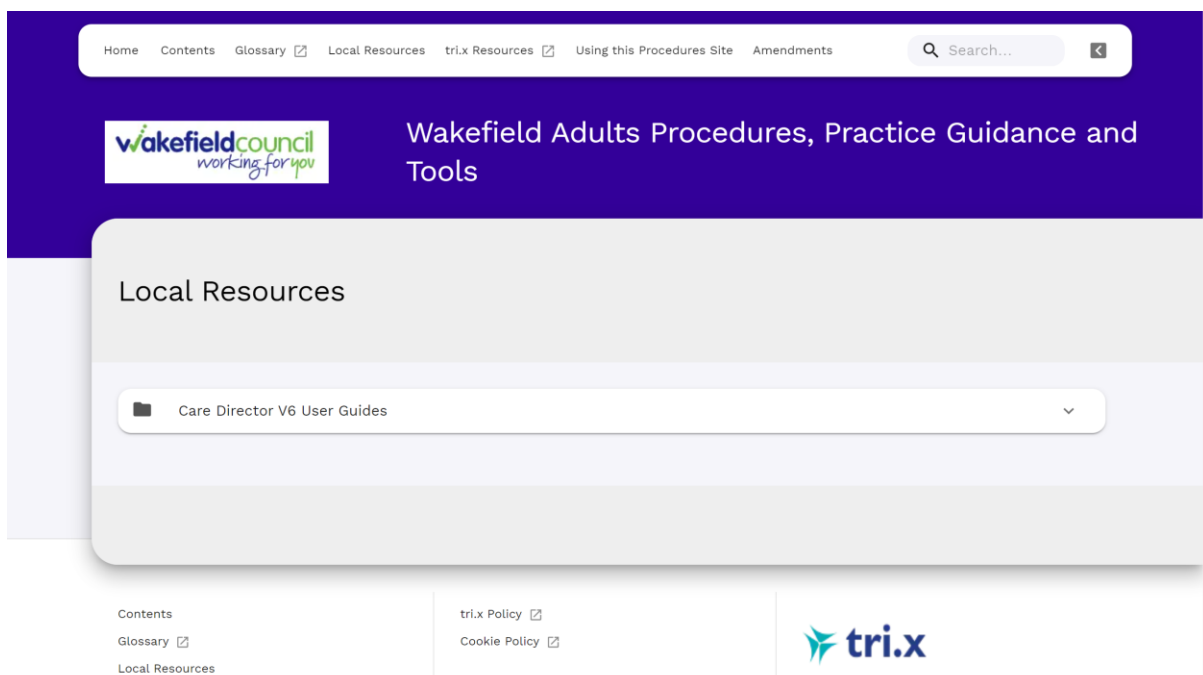


Further CareDirector Guidance

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