



Sensory Impairment Team

V1.0.1

Document CareDirector Sensory Impairment Team.
Purpose Sensory Impairment teams daily tasks on CareDirector.
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Owner ICT Business Transformation Team
Last Updated 18/11/2022

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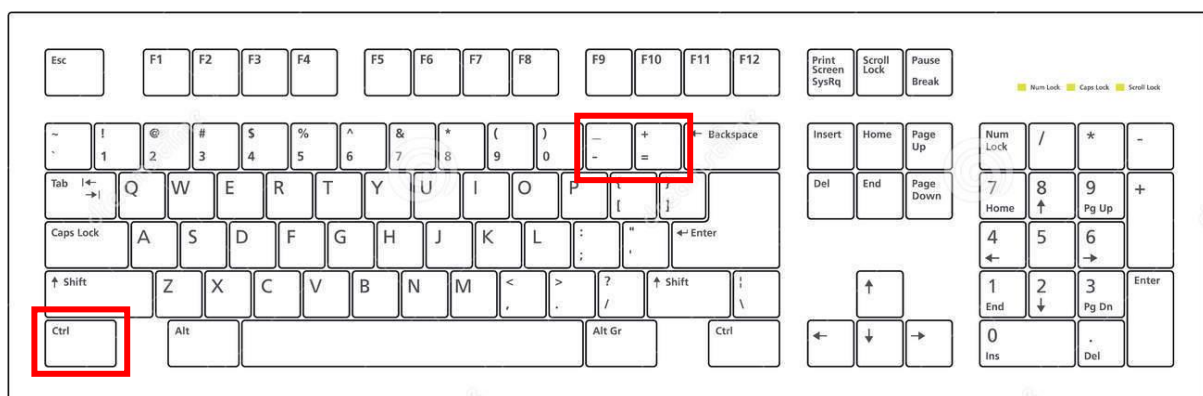
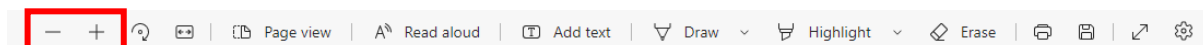
Guide Information

Before Live Access...

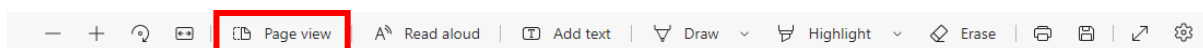
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

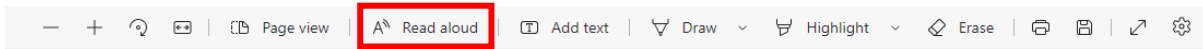
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



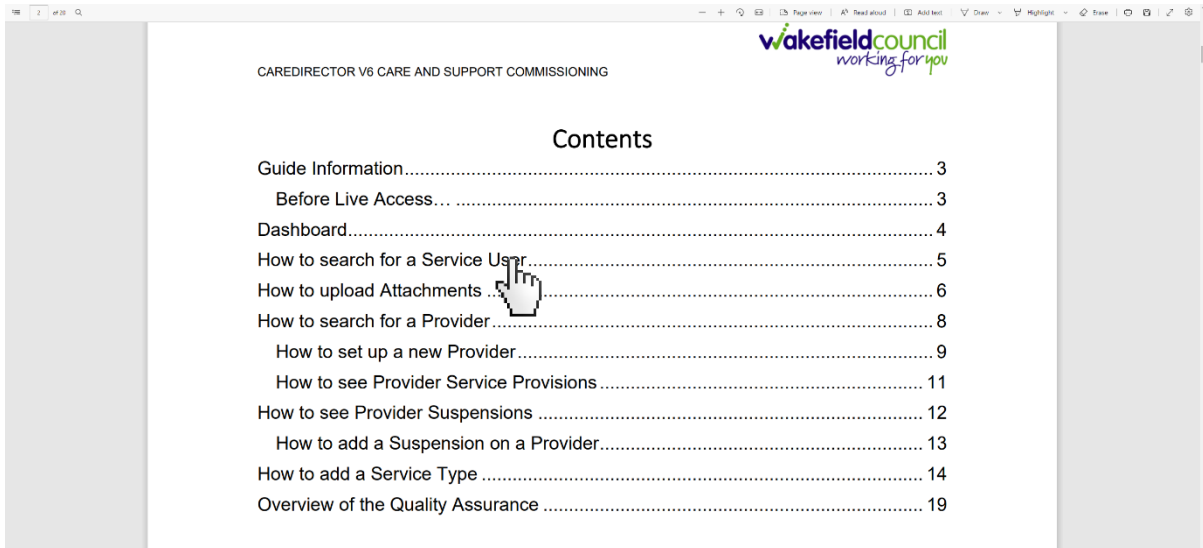
3. To put pages next to one another, select the **Page View** icon on the toolbar.



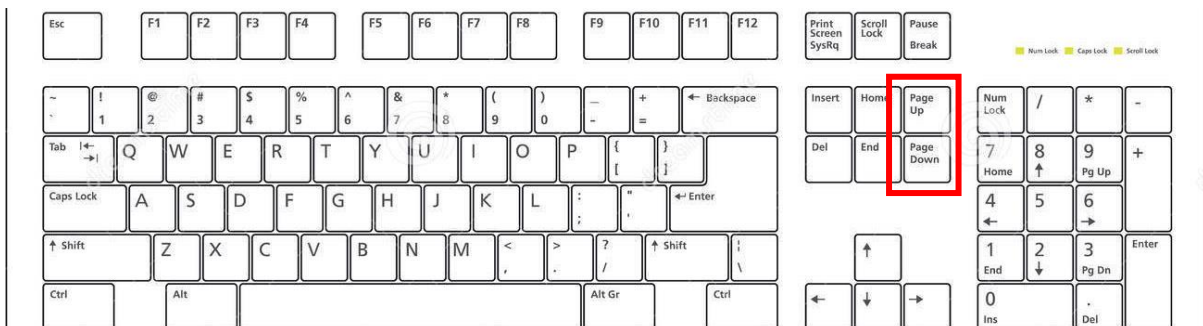
4. For auditory assistance, select **Read Aloud** from the toolbar.



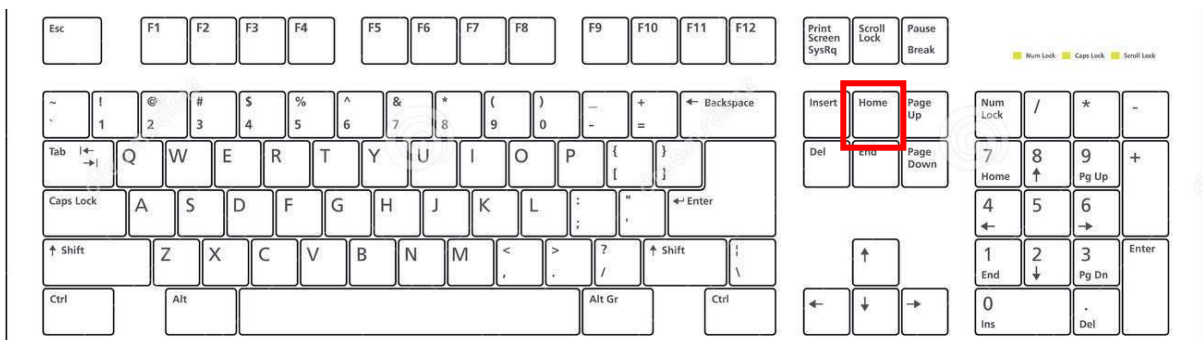
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

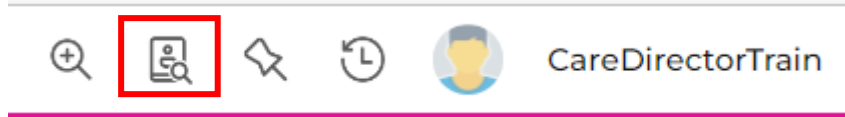


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

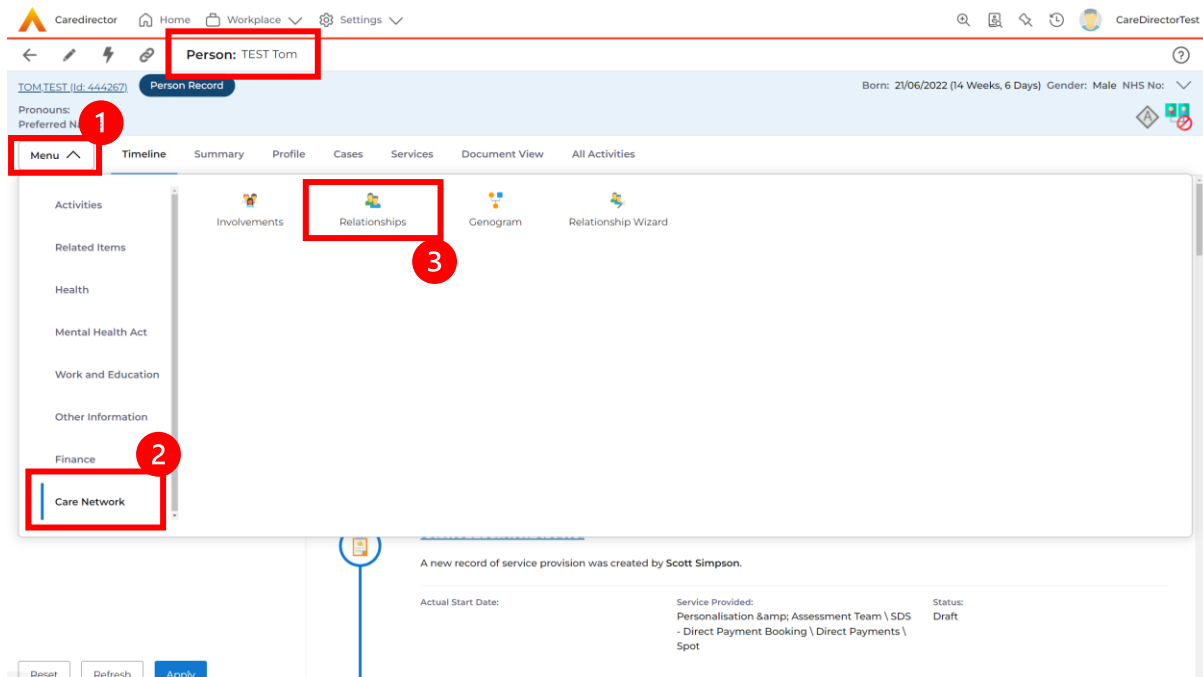
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case)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

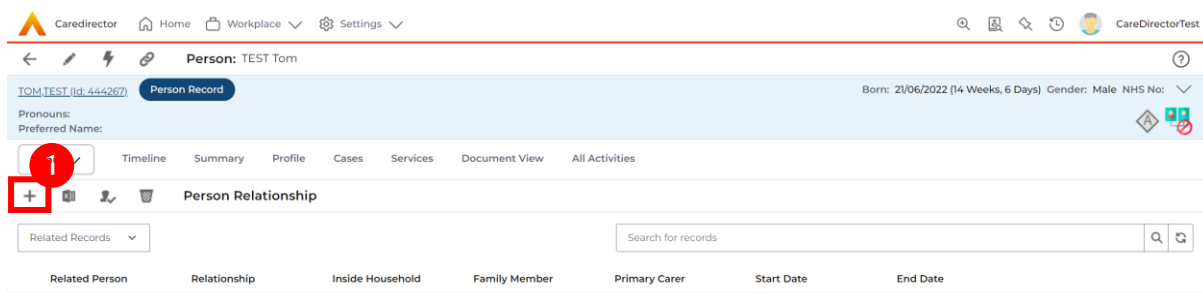
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no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

How to add relationships

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



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



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

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

TOM.TEST (id: 444267) **Person Record** Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No:
 Pronouns: Preferred Name:

Details

Relationship to Other Person

Primary Person*
 TEST Tom

is a*
 Brother

To*
 Tom MullenTest

Reciprocal Relationship

Person
 Tom MullenTest

is a*
 Brother

To
 TEST Tom

Relationship Details

Start Date*
 03/10/2022

Responsible Team*
 CareDirectorTest

End Date

Description

Nature of Relationship to Primary Person

Inside Household	Primary Carer
Family Member	Powers of Attorney
Next of Kin	Power of Attorney for Property and Financial Affairs
Emergency Contact	Financial Representative
Key Holder	Young Carer
Advocate	Legal Guardian
MHA Nearest Relative	Secondary Caregiver
Is Birth Parent	Has Parental Responsibility

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

How to search for a Case

1. Open the **Person Record** the **Case** is linked too. Then select the **Cases** tab to find the current **Case**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number 1. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (15 Weeks, 0 Day)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. The main content area shows a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' and 'Service Provision Created', both created by Scott Simpson.

2. When found, select it to open the **Case Record**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number 1. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. Below the tab, there is a search bar and a table of related records. The table has columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', and 'Case Status'. The first three rows are highlighted with a red box and a red circle containing the number 2.

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010	Assign To Team	Sc
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087	Assign To Team	Sc

How to create a Case

1. Locate the **Person Record** and under the tab **Cases**, select **Create New Record**.

Person: Tom MullenTest

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [redacted]

Pronouns: Preferred Name:

M [redacted] Timeline Summary Profile **Cases** Services Document View All Activities

+ [redacted]

Related Records [redacted] Search for records [redacted]

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
<input type="checkbox"/>	CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
<input type="checkbox"/>	CareDirectorTest	Catherine Jackson	15/06/2022 08:00:00	A - Adult Safeguarding	CAS-000001-0002		Assign To Team	Scott :

2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

Case: New

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [redacted]

Pronouns: Preferred Name:

Details

Contact Details

Case No * [redacted]

Person * Tom MullenTest [redacted]

Case Date/Time * 07/10/2022 09:00 [redacted]

Initial Contact [redacted]

Date/Time Contact Received * 06/10/2022 11:00 [redacted]

Contact Received By * Scott Simpson [redacted]

Contact Reason * A - Adult Safeguarding [redacted]

Presenting Priority [redacted]

Additional Information [redacted]

Referral Reason [redacted]

How to check the Case Status

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

Person: TEST Tom

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

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

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	Scot
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case is Allocated, Closed Under Review, etc.**

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

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Menu Timeline **Details**

Assignment Information

Case Status *
Assign To Team [x] [Q]

Case Priority [input] [Q]

Responsible User [input] [Q]

Responsible Team *
AMHP Coordinator [Q]

Review Date [calendar icon]

Last Assigned to Team Date
20/09/2022 [calendar icon]

How to change the Case Status

1. On the **Case Status** field select the **Lookup** function and select the relevant **Case Status**.

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

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [redacted]

Menu | Timeline | **Details** (1)

Assignment Information

Case Status* [Assign To Team] (2) [magnifying glass icon]

Case Priority [] [magnifying glass icon]

Responsible User [] [magnifying glass icon]

Responsible Team* [AMHP Coordinator] [magnifying glass icon]

Review Date [] [calendar icon]

Last Assigned to Team Date [20/09/2022] [calendar icon]

2. Choose the relevant option and select **OK** when found. Select **Save**.

Case Statuses Enter your search criteria.

Look in [Social Care Case Status Lookup View]

Search [Search for records] [magnifying glass icon] [refresh icon]

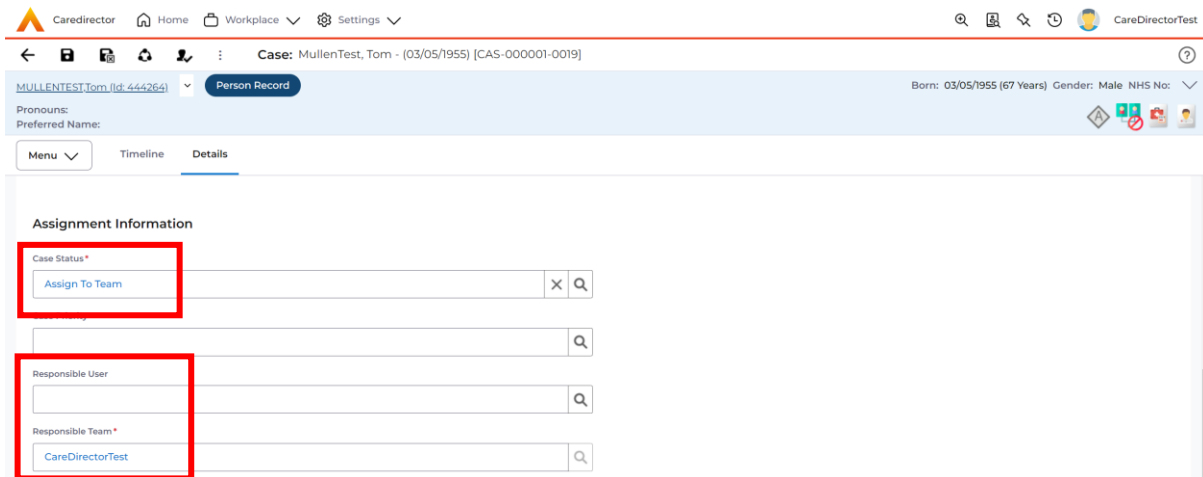
<input type="checkbox"/>	Name	Code	Gov C
<input type="checkbox"/>	Allocated	200013	
<input type="checkbox"/>	Assign To Team	200014	
<input type="checkbox"/>	Assigned to Team (unscheduled revie...		
<input type="checkbox"/>	Awaiting Allocation	200012	
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		

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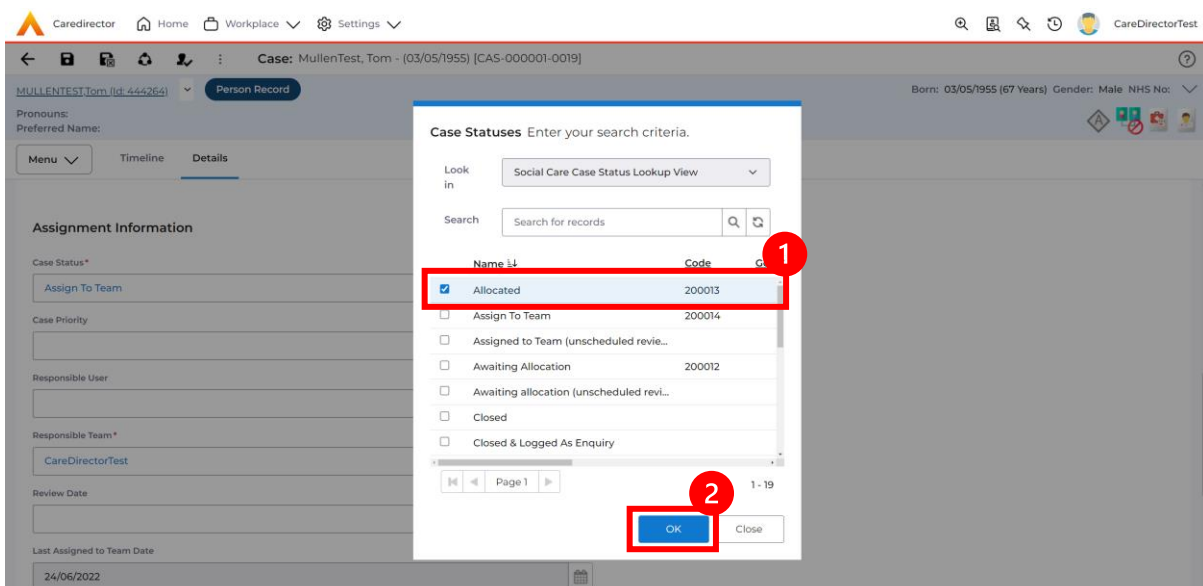
OK (2) Close

How to Allocate a Case to a Worker

1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route**.
2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.



3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.
4. First select the **Lookup** function on the **Case Status** field and select **Allocate**. Then select **OK**.



- After, the **Responsible User** field will be mandatory. Use the **Lookup** function and select the **Responsible User** for this **Case**. When selected, select **OK**.

Responsible User*

🔍

System Users Enter your search criteria.

Look in: My Business Unit Users

Search: System Views, Active Managers, Deactivated Users, Lookup View, My Business Unit Users, My Default Team, My Record

Search	Name	Role
<input type="checkbox"/>	CareLiveIFD Wakefield	CareDirectorTest
<input type="checkbox"/>	CareLiveInstall CareWo...	CareDirectorTest
<input type="checkbox"/>	CareLiveInternal Wak...	CareDirectorTest
<input type="checkbox"/>	CareLiveMigration Wa...	CareDirectorTest
<input type="checkbox"/>	CareLivePlugin Wakefie...	CareDirectorTest
<input type="checkbox"/>	CareLivePowerusr Wak...	CareDirectorTest
<input type="checkbox"/>	CareTestIFD Account	CareDirectorTest

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OK Close

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

Case: MullenTest, Tom - (03/05/1955) [CAS-000001-0019]

MULLENTEST, Tom (id: 444264) Person Record

Born: 03/05/1955 (67 Years) Gender: Male NHS No: [redacted]

Menu Timeline Details

Assignment Information

Case Status* Allocated

Case Priority

Responsible User* Scott Simpson

Responsible Team* CareDirectorTest

Review Date

Save

How to send a Case to another team

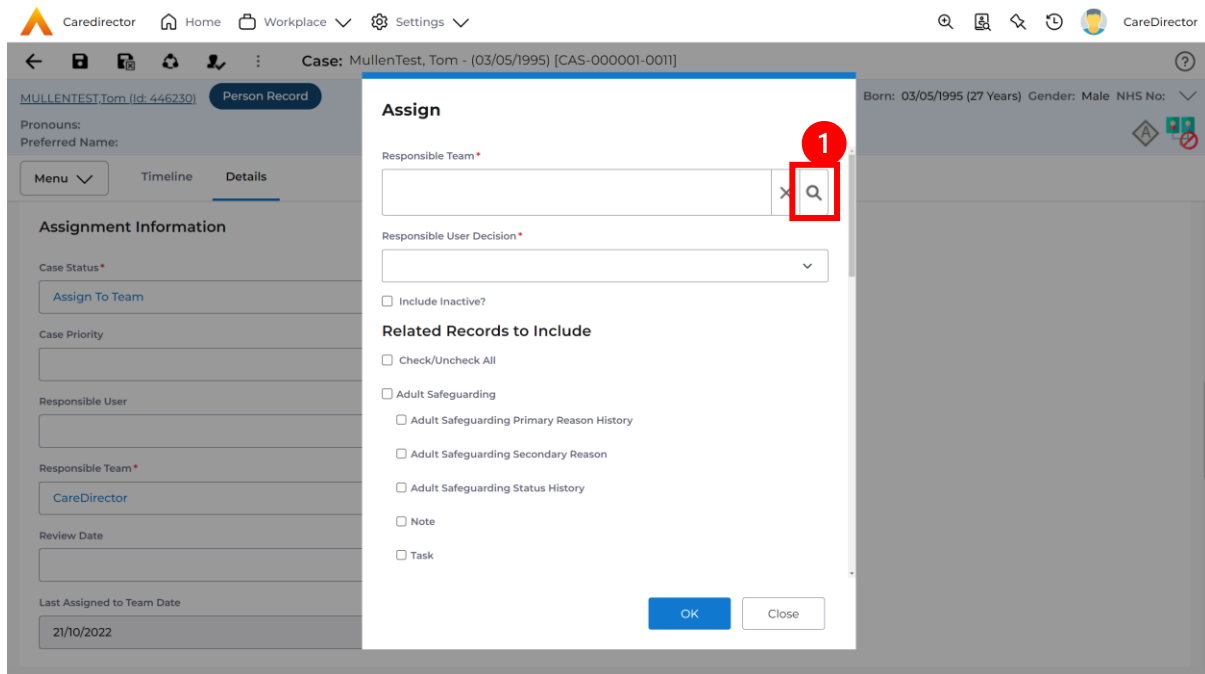
1. There may be reasons that a **Case** needs to be sent to another team.
2. Locate the **Case** that requires assigning to another team, if this **Case** has a **Responsible User**, then it will have the **Case Status** of **Allocated**.
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save**.

The screenshot shows the CareDirector interface for a case named 'MullenTest, Tom'. The 'Assignment Information' section includes fields for Case Status, Case Priority, Responsible User, Responsible Team, and Review Date. The 'Case Status' dropdown is currently set to 'Assign To Team'. A red box highlights the 'Assign To Team' dropdown, and a red circle with the number '1' is next to it. Another red box highlights the 'Save' icon in the toolbar, with a red circle and the number '2' next to it.

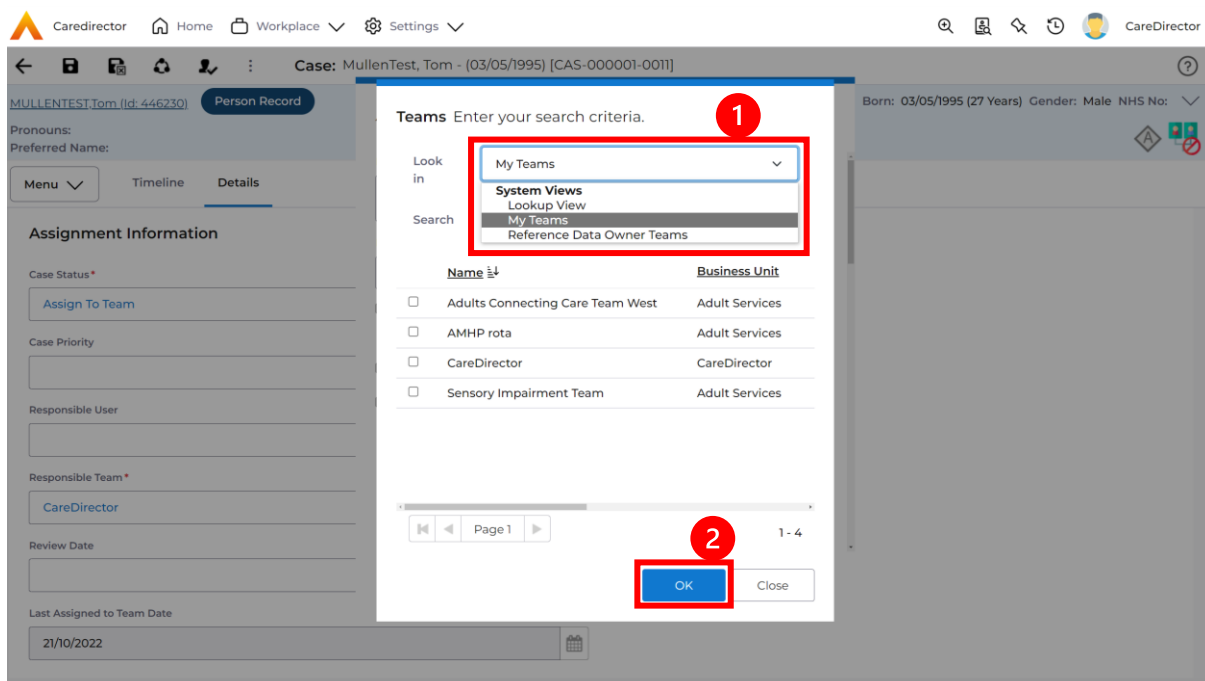
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for the same case. The 'Assignment Information' section is visible. The 'Case Status' dropdown is still set to 'Assign To Team'. A red box highlights the 'Assign this record to another team' icon in the toolbar, with a red circle and the number '1' next to it.

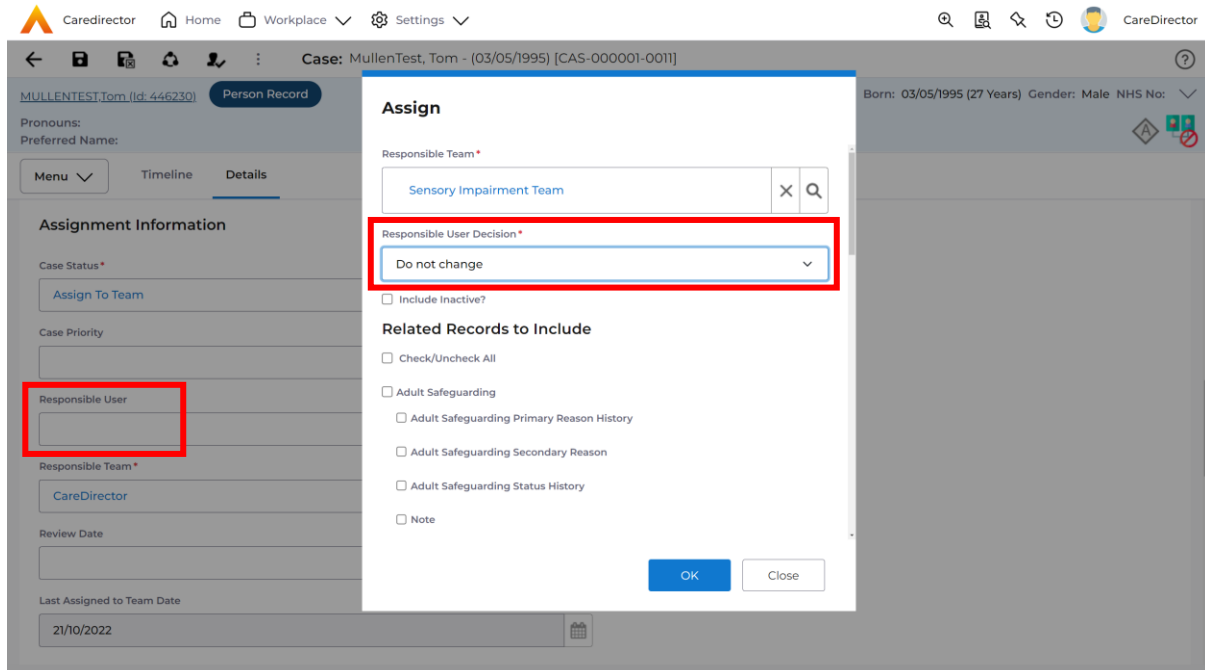
- This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup** function.



- 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**.



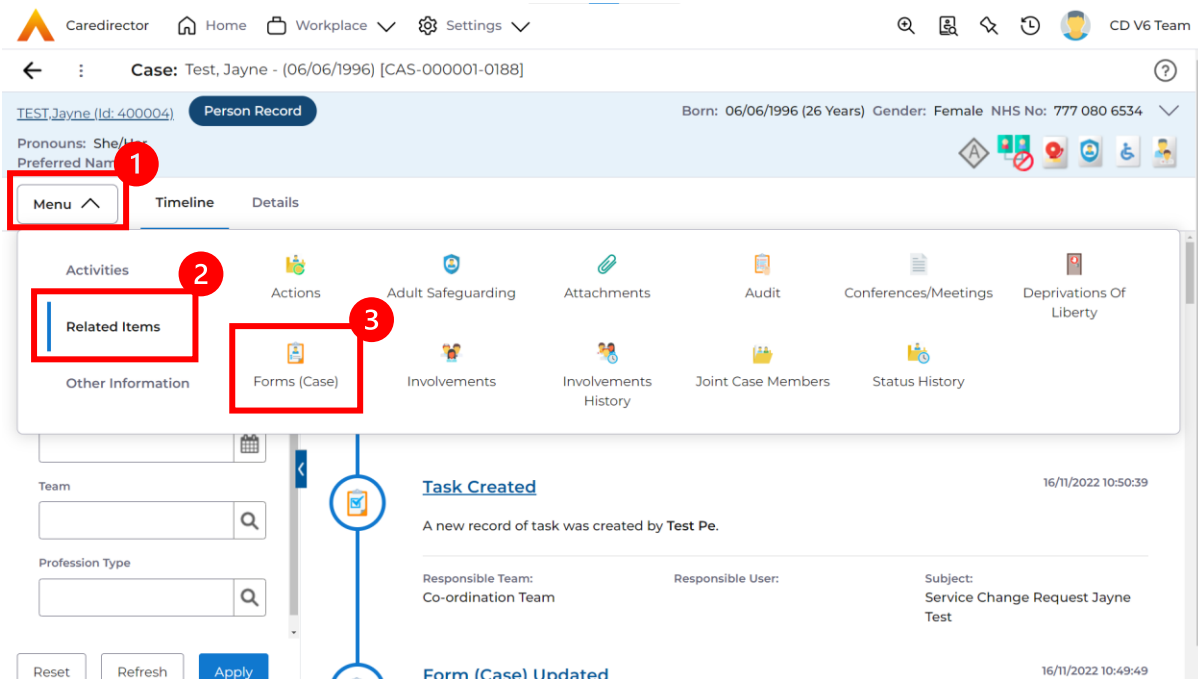
- The next section is going to ask what you want to do about the **Responsible User**. Due to the **Responsible User Workflow** being triggered, removing the current **Responsible User** from the field. We can leave this as **Do Not Change** however, if it has not removed it (you can check by looking at the field on screen) set it as **Clear on Current Record Only**.



- When finished, select **OK**. It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

COT & SI Secondary Allocation Process

1. Locate the **Case** where the **Secondary Allocation** should be incorporated. Then **Menu > Related Items > Forms (Case)**.



2. Select the relevant form, either **Occupational Therapy Referral (Secondary Allocation)** or **Sensory Impairment (Secondary Allocation)** form.

Form Type *

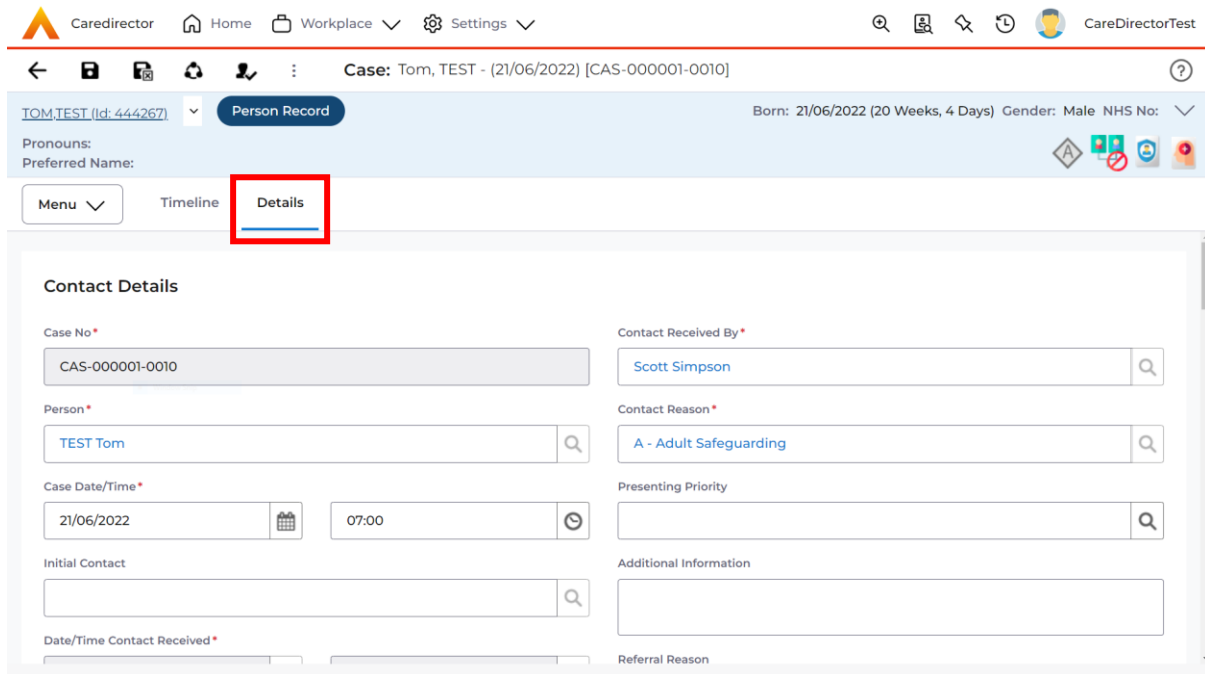
Form Type *

3. When this **Form** has been **Completed** a **Workflow** which creates the **Secondary Case** and generates a **Task** to the relevant team.

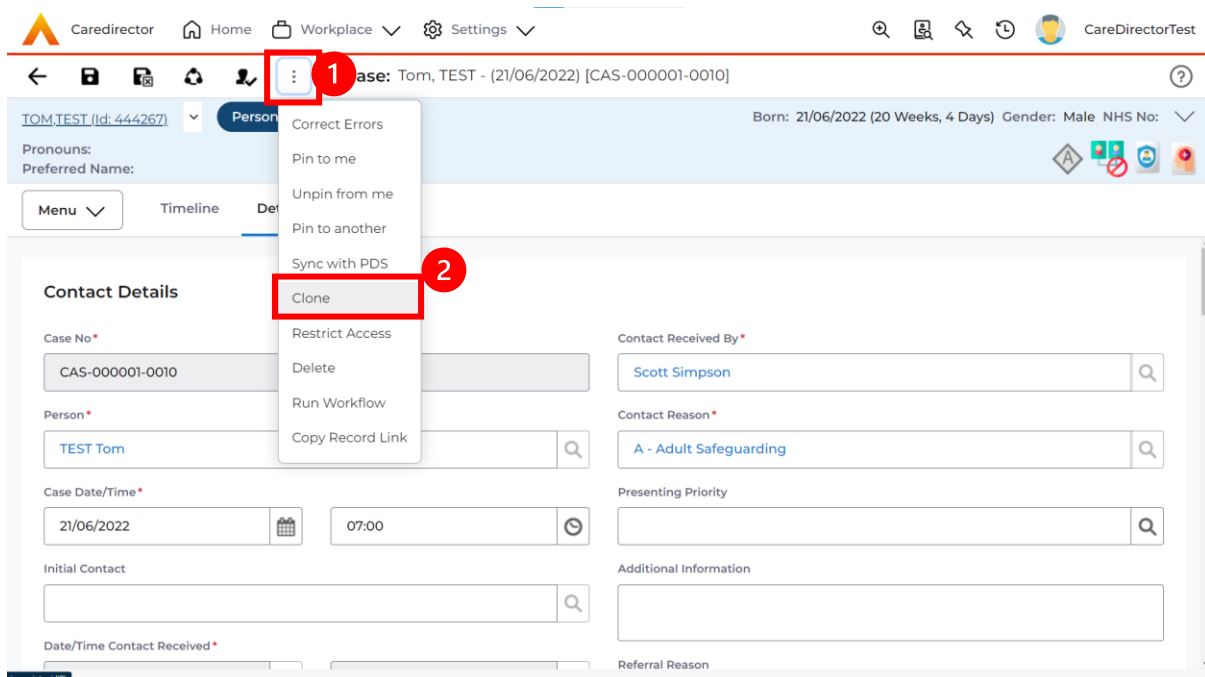
Status *

How to clone a Case

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



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



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

Clone Social Care Case

1

Start Date/Time for Cloned Cases *

12/11/2022

<input checked="" type="checkbox"/>	<u>Person Id</u>	<u>Person</u> ⌵	<u>Date of Birth</u>	<u>Gender</u>	<u>Relat</u>
2 <input checked="" type="checkbox"/>	444264	Tom MullenTest	03/05/1955	Male	Brot

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3

Clone

Close

How to find Activities

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

Team activities | **My activities** | Team cases (all teams) | Service provisions | Dashboards

My Active Tasks/Notes

<input type="checkbox"/>	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

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My Active Case Notes

Subject	Person	Priority	Event Date	Date	Created On	Created By	Modified On
---------	--------	----------	------------	------	------------	------------	-------------

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]

Clear Filters | **Search**

<input type="checkbox"/>	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 CareDirector interface for a person named 'Test Tom'. The 'All Activities' filter panel is open on the left. 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.

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

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

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' table is displayed. 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.

The screenshot shows the CareDirector interface for a person record. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case name 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is displayed. The main header shows 'Person Record' for 'TOM,TEST (id: 444267)' with birth date '21/06/2022 (14 Weeks, 6 Days)' and gender 'Male'. A 'Menu' button is highlighted with a red box and a '1'. A dropdown menu is open, showing 'Activities' highlighted with a red box and a '2'. Other options in the menu include 'Timeline', 'Details', 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', 'Tasks', 'Related Items', and 'Other information'. Below the menu, there are input fields for 'Responsible User' and 'Responsible Team' (currently set to 'AMHP Coordinator').

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

The screenshot shows the CareDirector interface for a person record. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case name 'Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]' is displayed. The main header shows 'Person Record' for 'TOM,TEST (id: 444276)' with birth date '24/07/1950 (72 Years)' and gender 'Male'. A 'Menu' button is highlighted with a red box and a '1'. Below the menu, there's a toolbar with a '+' icon highlighted with a red box and a '1'. The main content area shows a table of 'Related Records' with columns: Subject, Due, Status, Regarding, Reason, Responsible Team, and Responsible User. The table contains four rows of records related to 'CHC Funding Decision - Fully funded'.

Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
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 CareDirector interface for creating a new case note. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Case Note (For Case): New' and 'Person Record' for 'TOM.TEST (id: 444267)'. The form fields are as follows:

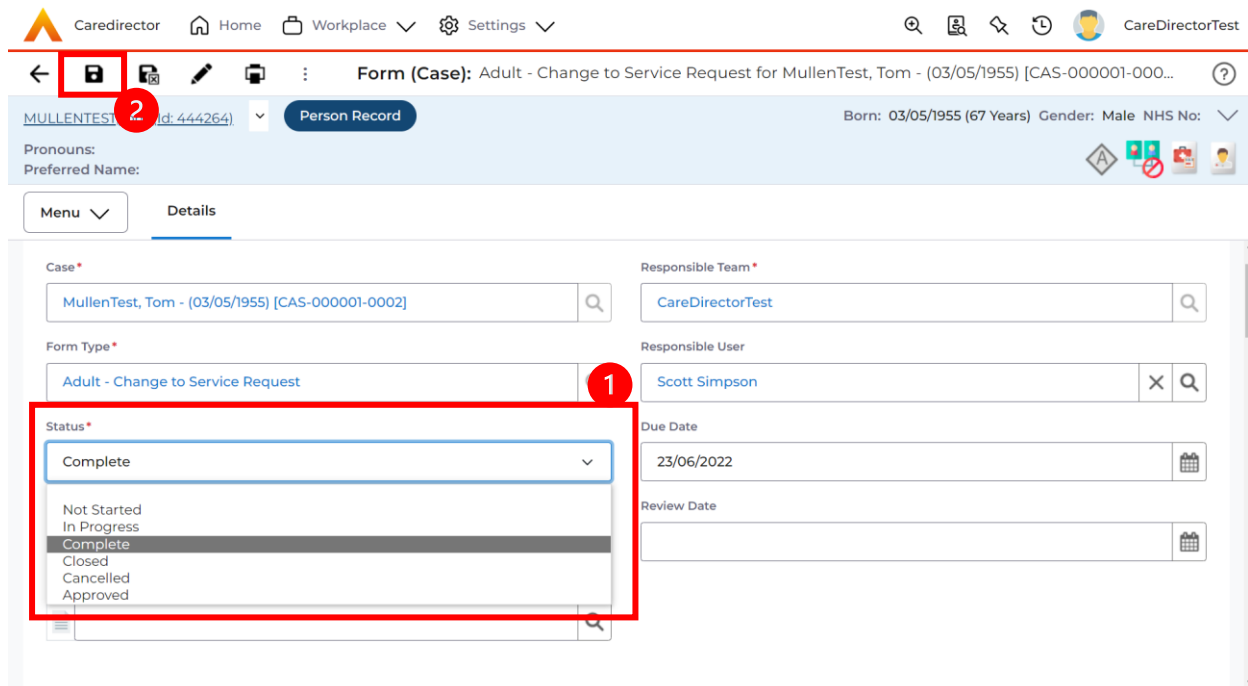
- Case ***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team ***: CareDirectorTest
- Responsible User**: Scott Simpson
- Reason**: (Empty)
- Priority**: (Empty)
- Date ***: (Empty)
- Status ***: Open
- Category**: (Empty)
- Sub-Category**: (Empty)
- Outcome**: (Empty)

Red annotations: A red box with a '2' highlights the 'Save' button in the top navigation bar. A red box with a '1' highlights the 'Responsible User' field, which contains 'Scott Simpson'.

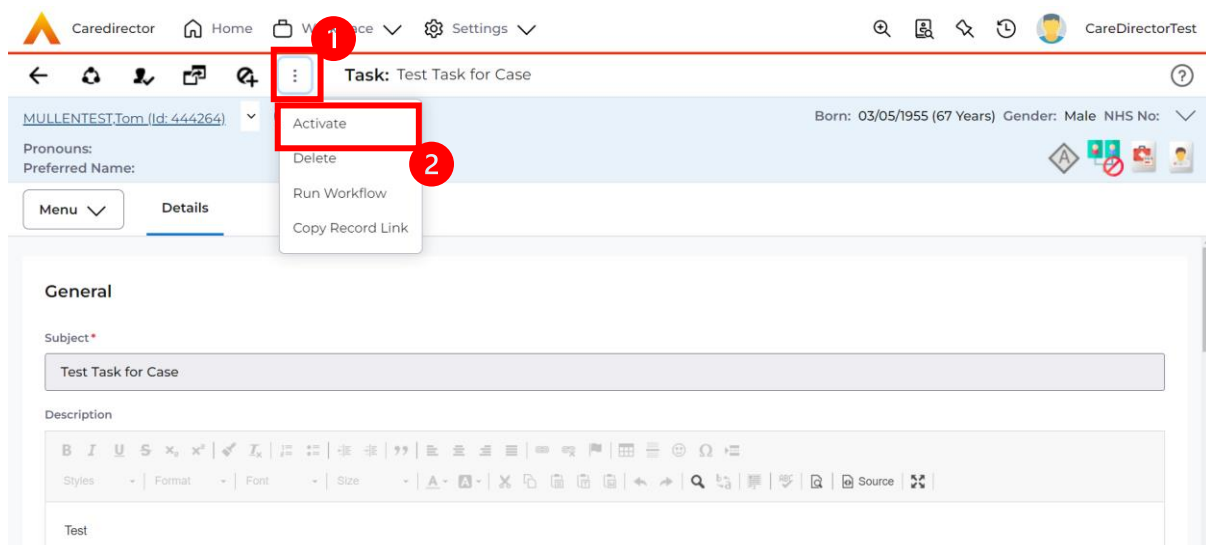
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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**.

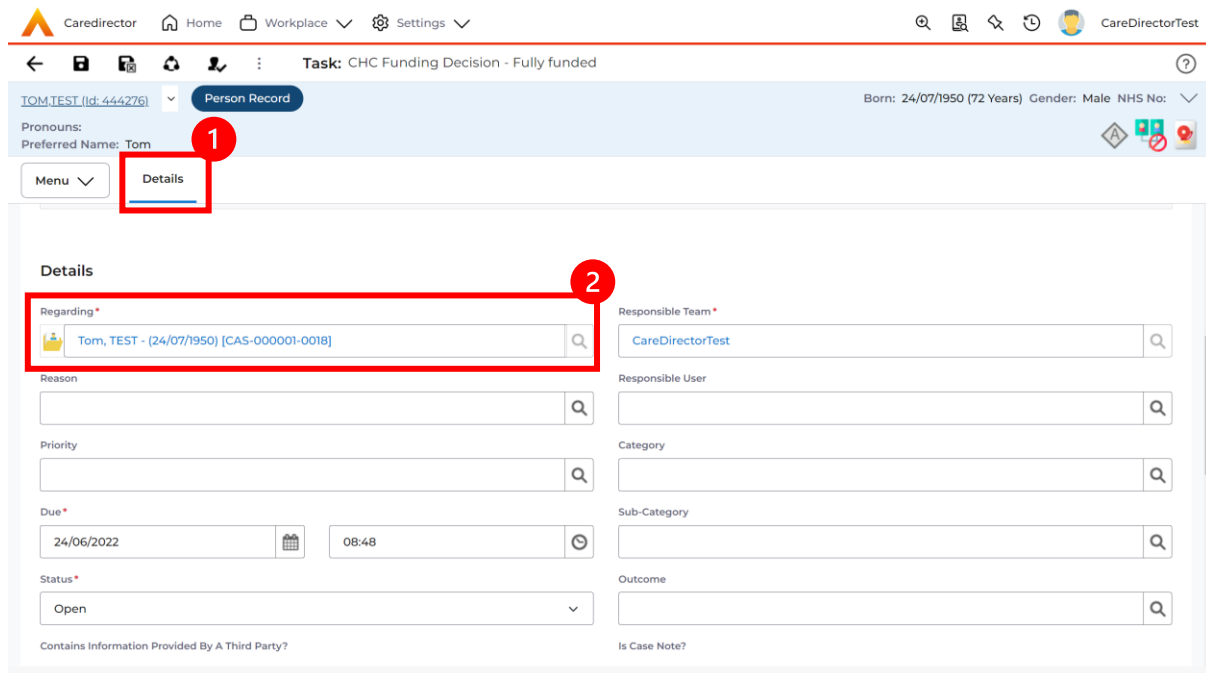


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

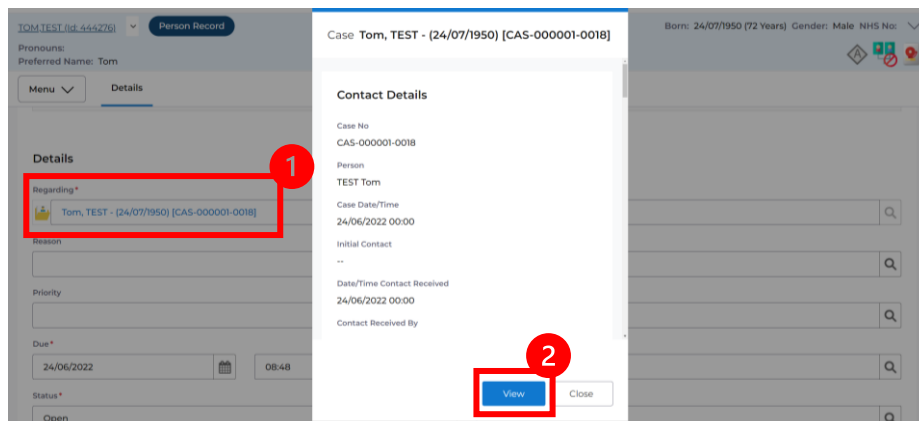


How to tell if an Activity is linked to a Case or Person Record

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.

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' selected. 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 dialog box open. The dialog box has three red circles: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The dialog box also shows a search bar, a table of teams, and pagination controls.

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 CareDirector interface for a 'Person Record'. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'MULLENTEST, Tom (Id: 446230) > Person Record'. The main form area is titled 'Details' and contains several fields:

- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001] (with an 'X' icon)
- Responsible Team***: Sensory Impairment Team (with an 'X' icon)
- Reason**: (empty field)
- Responsible User**: Scott Simpson (with an 'X' icon and a red box labeled '1')
- Priority**: (empty field)
- Category**: (empty field)
- Due***: (empty field)
- Sub-Category**: (empty field)
- Status***: Open (dropdown menu)
- Outcome**: (empty field)

At the bottom, there are two radio button options:

- Contains Information Provided By A Third Party?
 Yes
 No
- Is Case Note?
 Yes
 No

A red box with a '2' in a red circle highlights the 'X' icon in the top navigation bar.

How to Allocate an existing Activity to another team

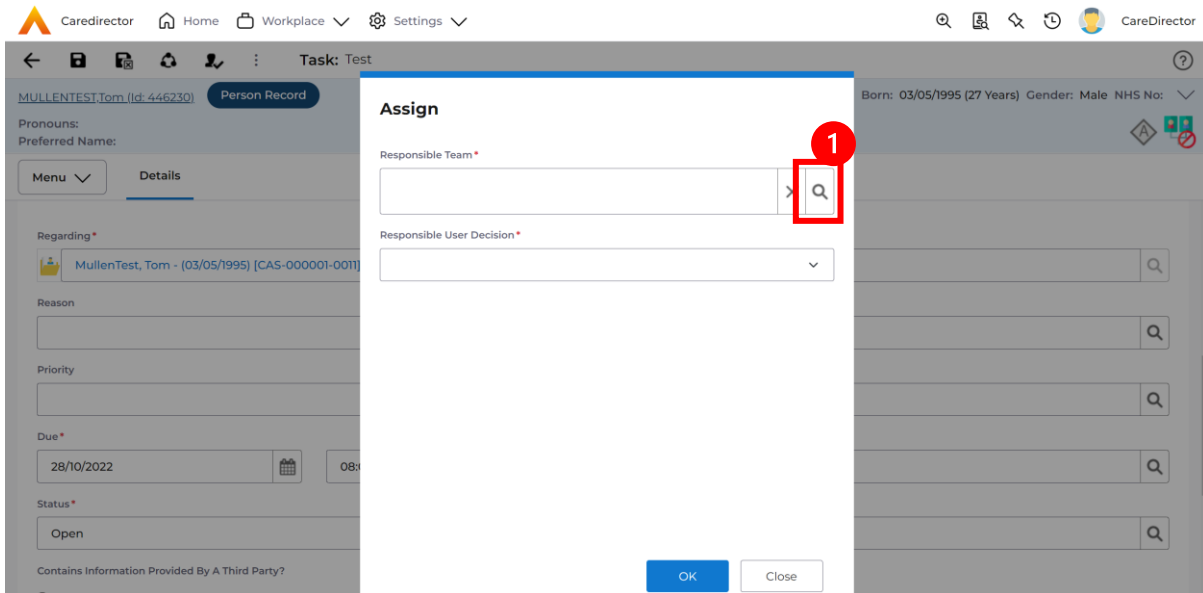
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The task is titled 'Task: Test' and is associated with 'MULLENTEST, Tom (Id: 446230)'. The 'Responsible Team' is 'Sensory Impairment Team' and the 'Responsible User' is 'Scott Simpson'. A red box highlights the 'X' button next to the user name, with a red circle containing the number '1' next to it. Other fields include 'Reason', 'Priority', 'Due' (28/10/2022), 'Status' (Open), and 'Outcome'.

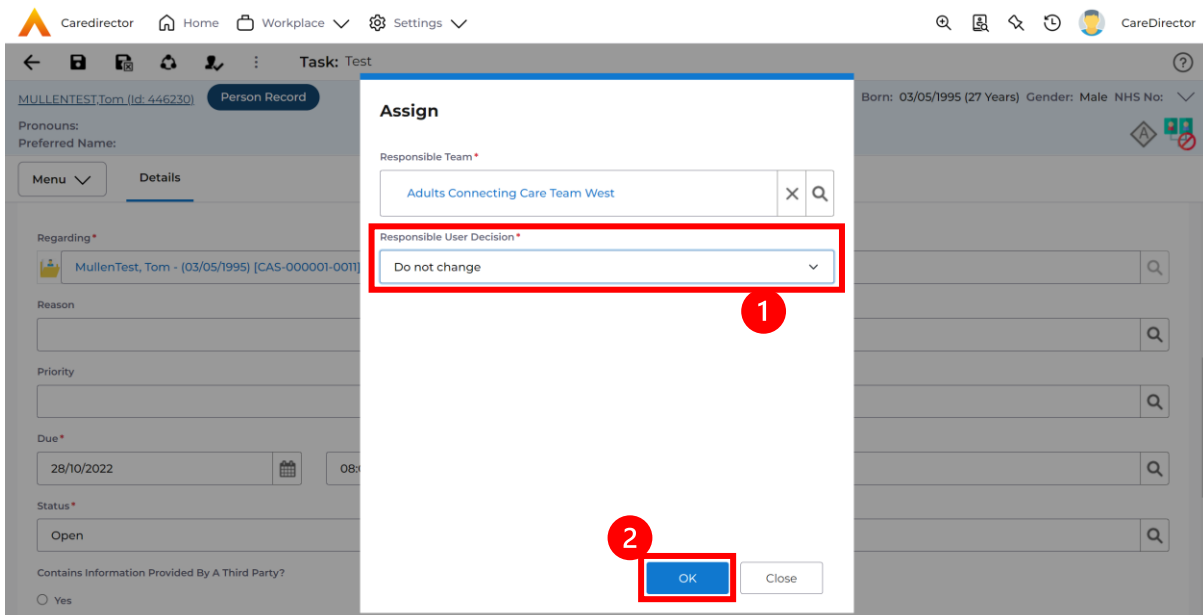
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same CareDirector interface as above, but with the 'Assign' button in the toolbar highlighted by a red box and a red circle containing the number '1'. The 'Responsible User' field is now empty, indicating that the user has been removed or is about to be replaced. The rest of the form remains the same.

- 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.



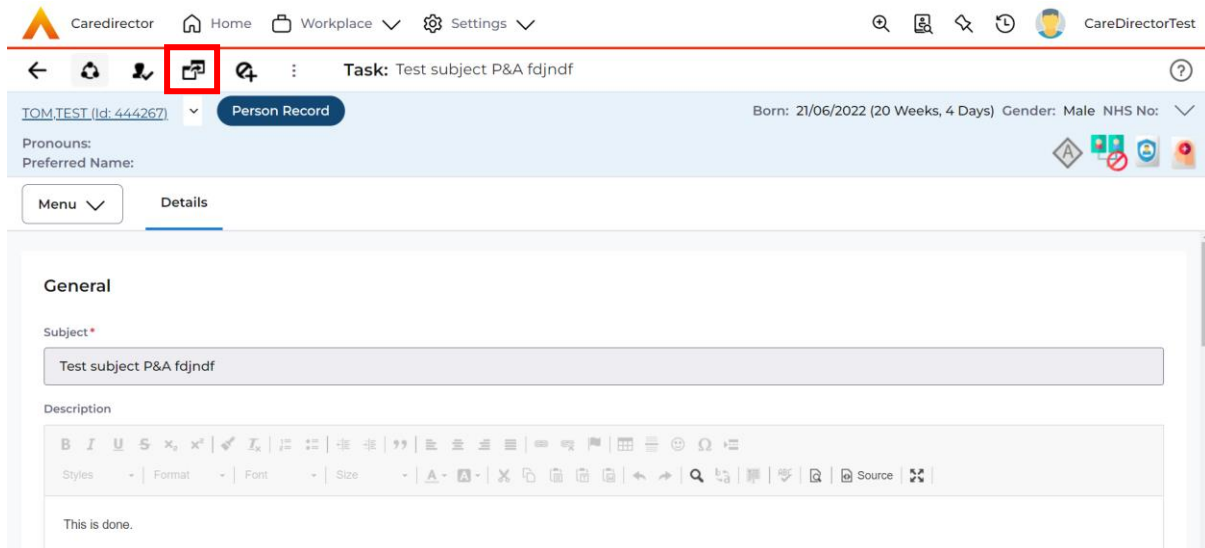
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



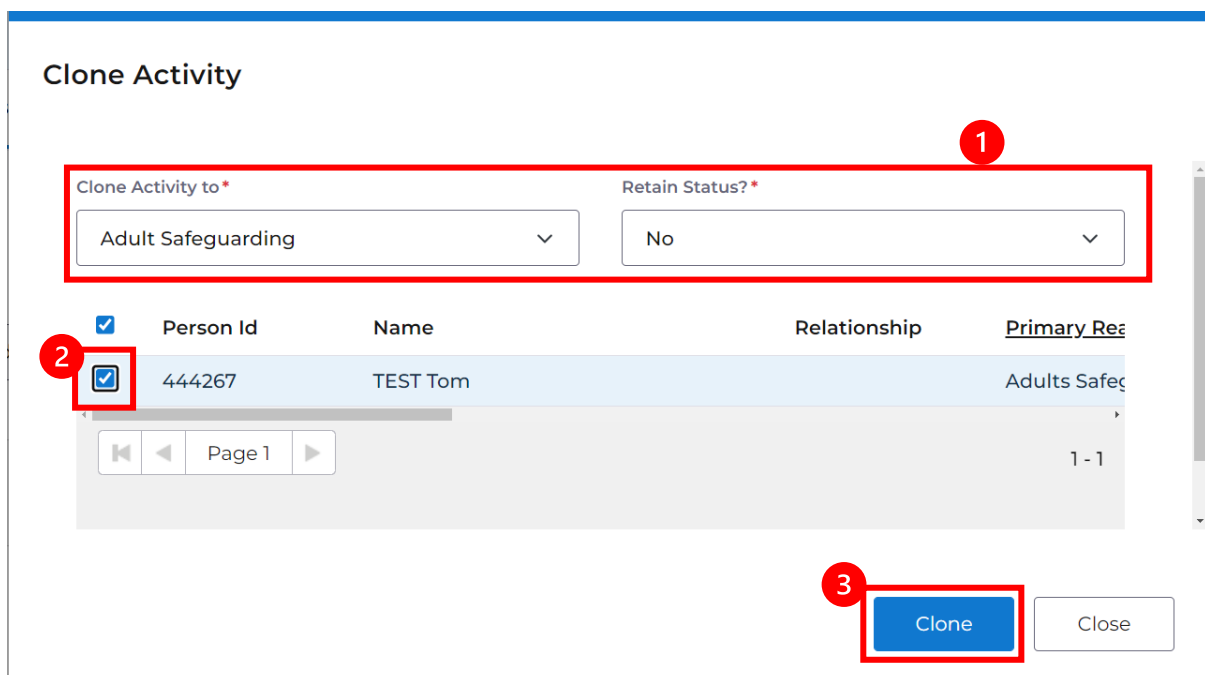
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

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**.

The screenshot shows the CareDirector interface for a person record. The breadcrumb path is 'Person: TEST Tom'. The main navigation menu is open, and 'Related Items' is selected. The 'Attachments' option is highlighted in the main content area.

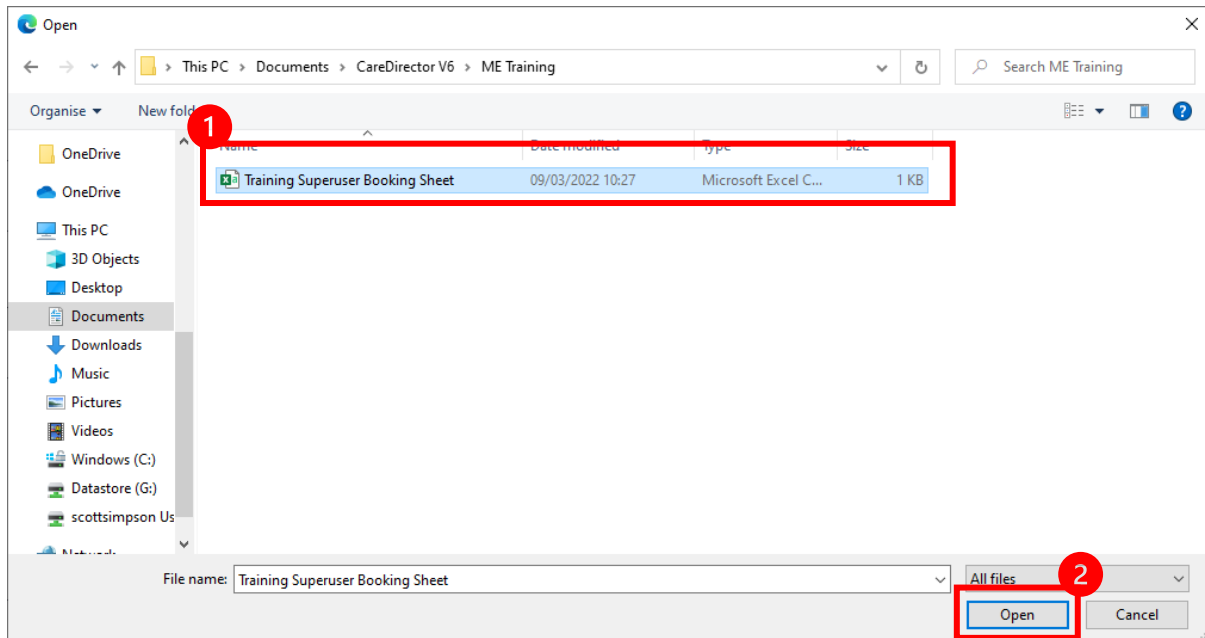
2. When opened, select the **Create New Record** from the toolbar.

The screenshot shows the 'Attachments (For Person)' screen. The toolbar at the top contains a '+ Create New Record' button, which is highlighted with a red box and the number 1. Below the toolbar is a search bar and a table with columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is currently empty, displaying a 'NO RECORDS' message.

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', with the 'Browse' button also highlighted. Other fields include Person (TEST Tom), Responsible Team (CareDirectorTest), Title (Test Document Upload), Date (04/10/2022), Document Type (Clients), and Declared (No).

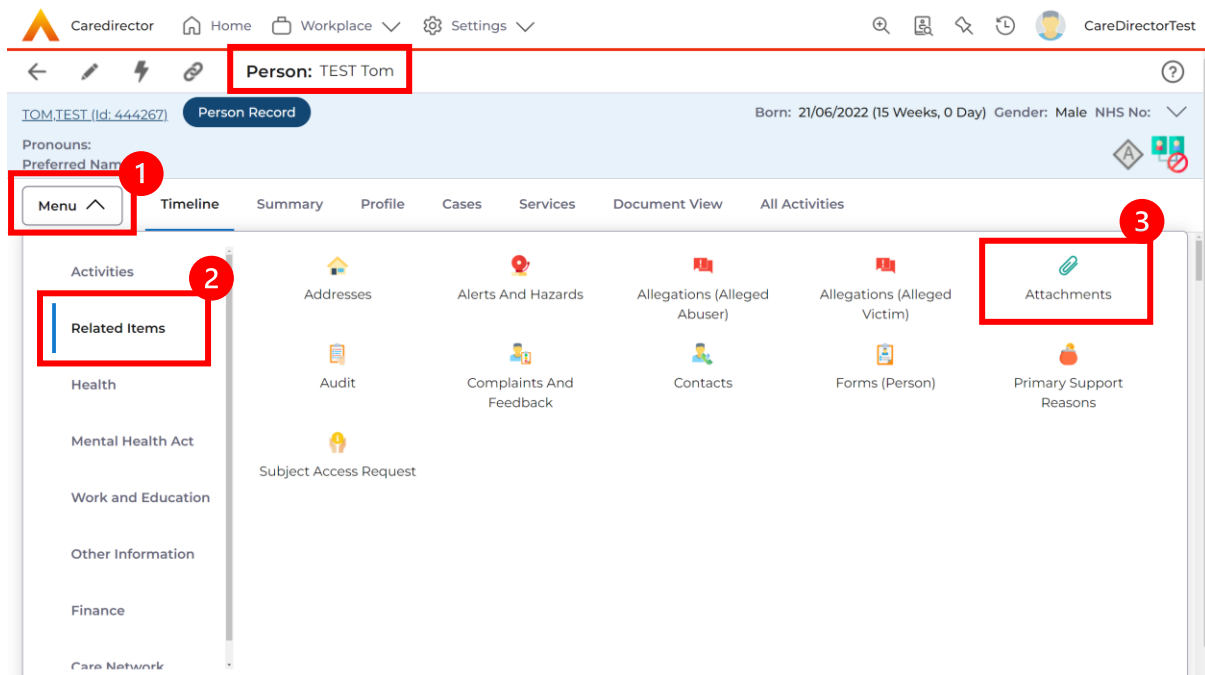
4. Select a **File** from your computer/ SharePoint and select **Open**.



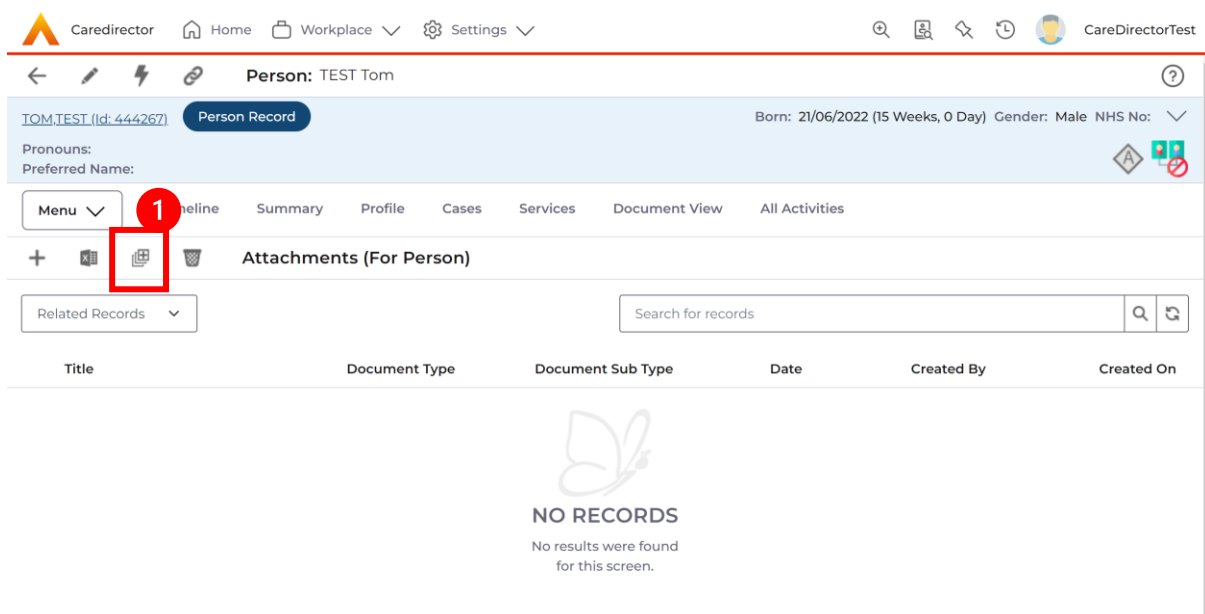
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

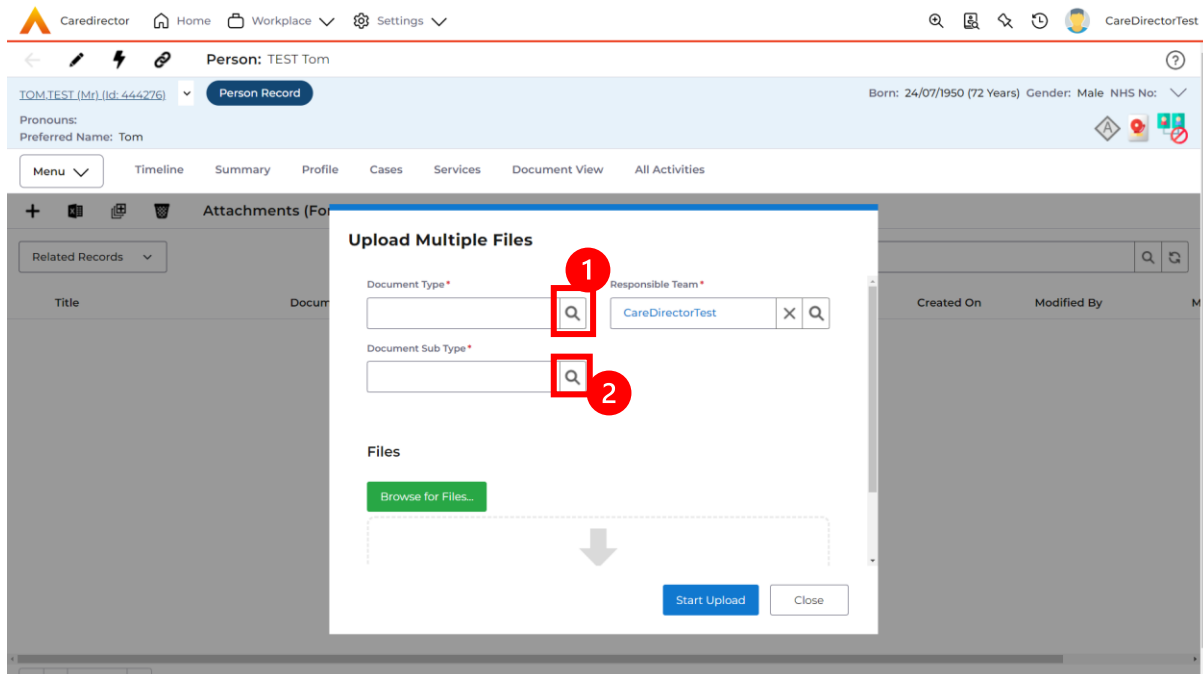
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



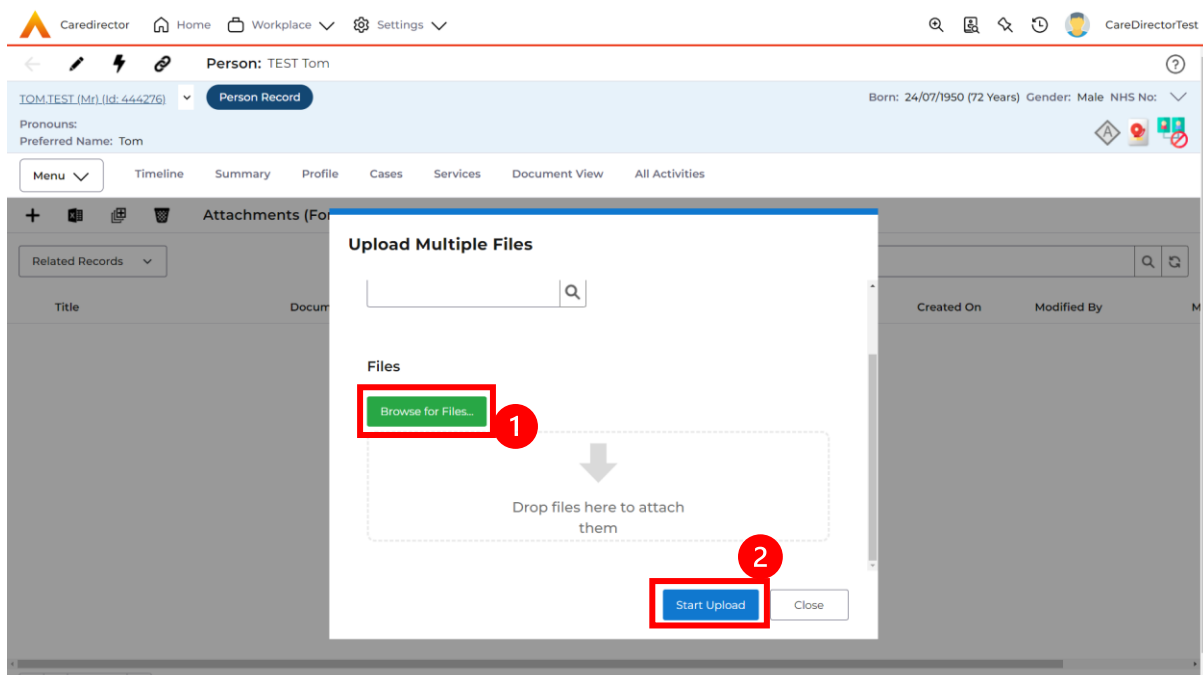
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 trail at the top is highlighted with a red box and labeled '1'. Below it, the 'Menu' dropdown is highlighted with a red box and labeled '2'. Within the menu, 'Related Items' is highlighted with a red box and labeled '2'. Finally, the 'Forms (Case)' option is highlighted with a red box and labeled '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 trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below the breadcrumb, there is a search bar and 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. There is one record listed: 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

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

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

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]

Person Record

Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Menu ^ Timeline Details

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

Related Items Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

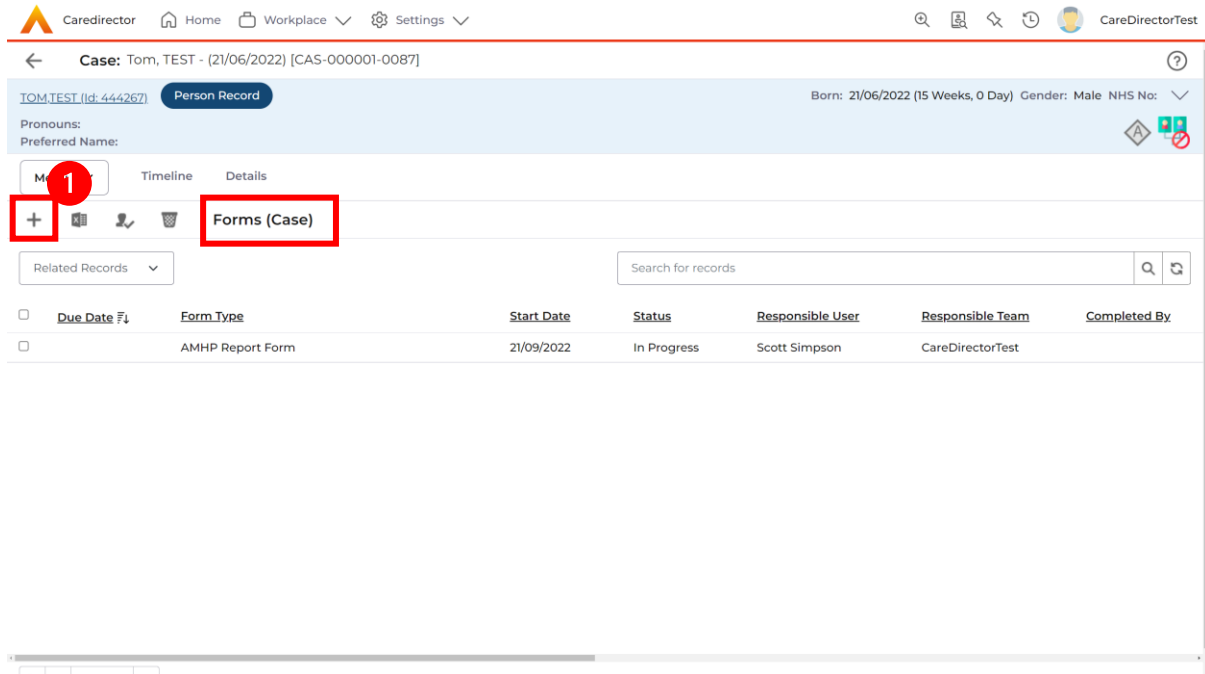
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

Due Date: [input] Form Type: AMHP Report Form Status: In Progress

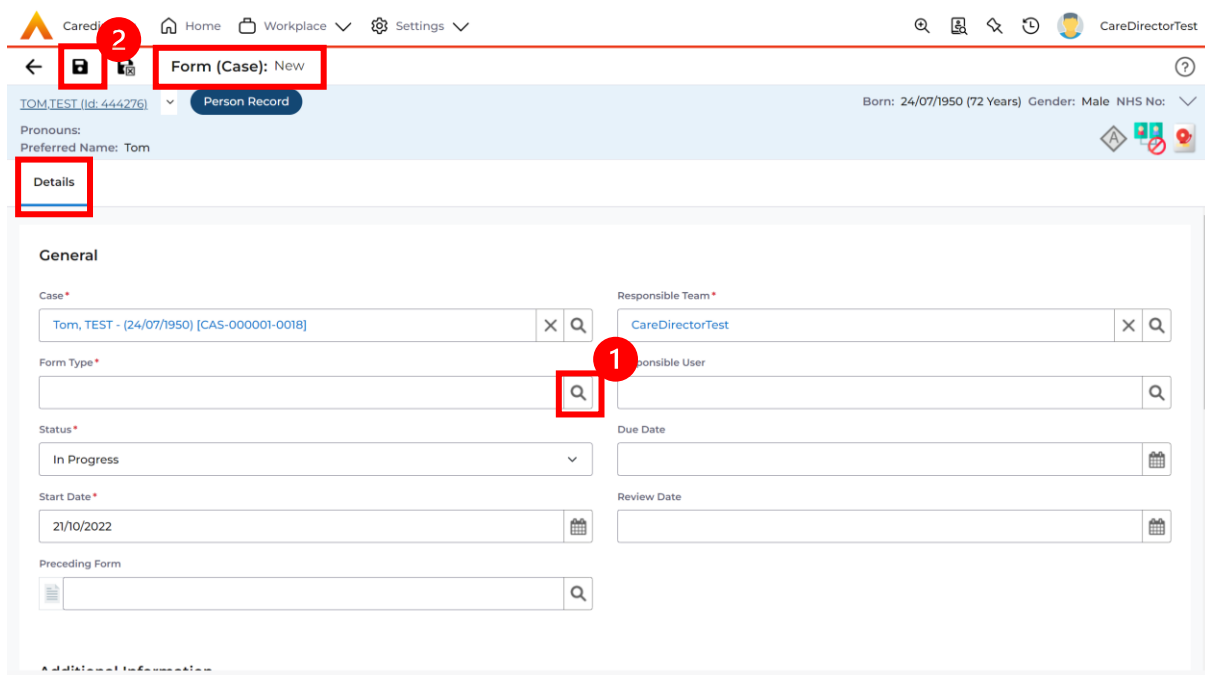
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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.

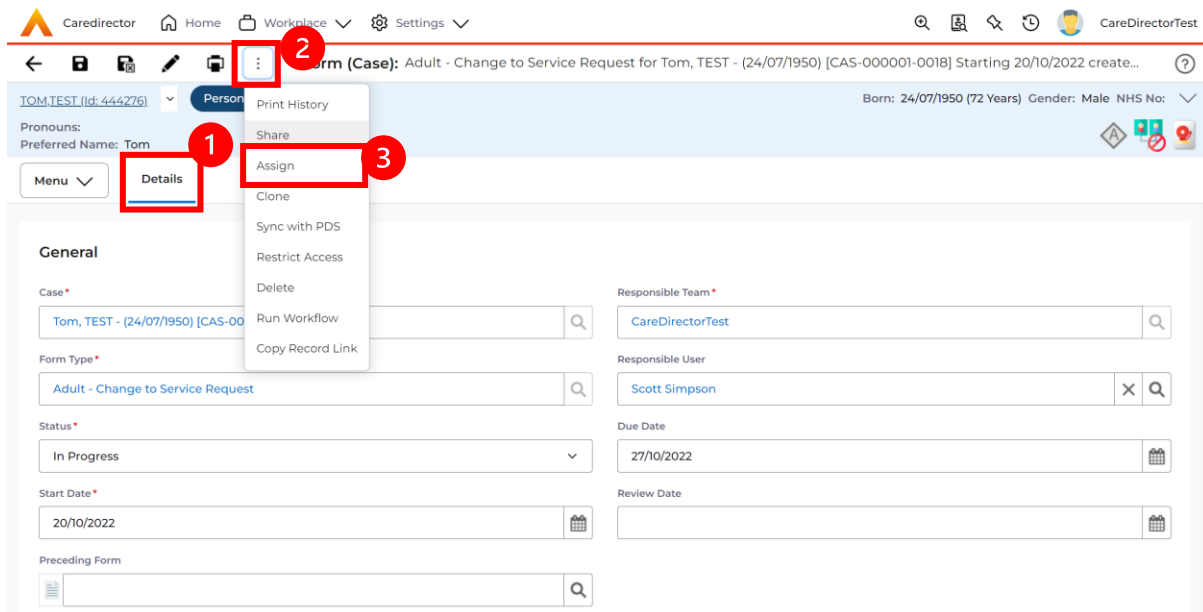
The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The user is logged in as "CareDirectorTest". The interface includes a navigation bar with "Home", "Workplace", and "Settings" options. Below the navigation bar, there is a toolbar with several icons, including a red box highlighting the "Edit" icon (a pencil) and a red circle with the number "1" next to it. The main content area displays the "General" section of the form, which includes fields for Case, Form Type, Status, Start Date, Preceding Form, Responsible Team, Responsible User, Due Date, and Review Date. The Case field is populated with "Tom, TEST - (21/06/2022) [CAS-00001-0087]". The Form Type is "AMHP Report Form". The Status is "In Progress". The Start Date is "21/09/2022". The Responsible Team is "CareDirectorTest" and the Responsible User is "Scott Simpson".

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

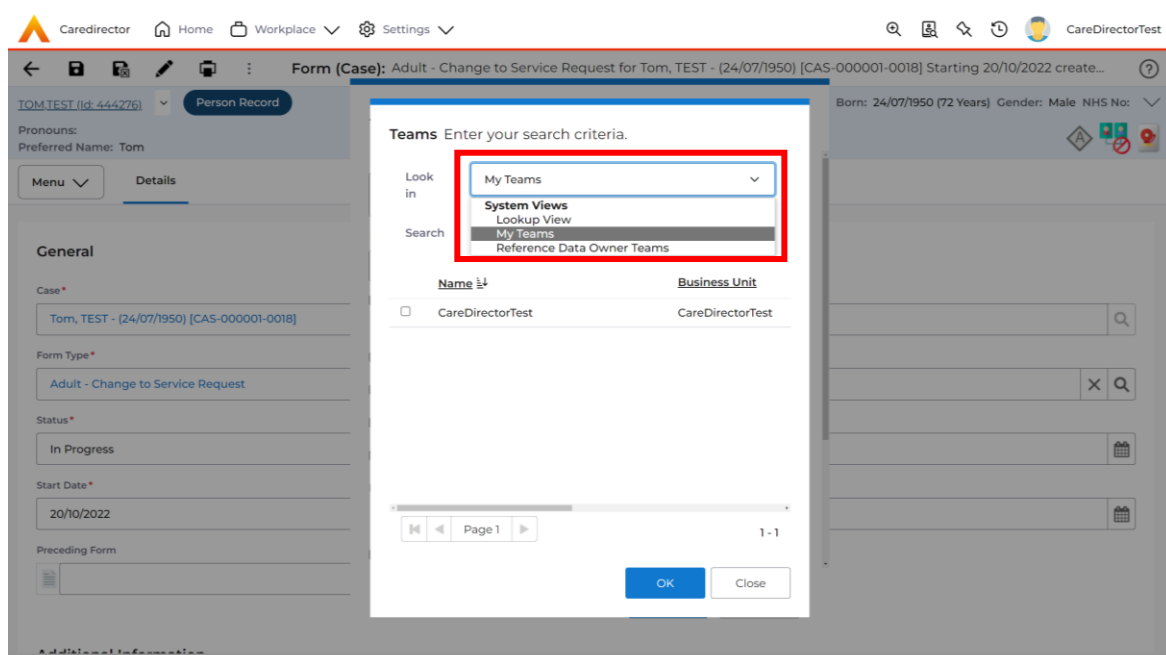
The screenshot shows the CareDirector interface for the "AMHP Report Form". The user is logged in as "CareDirectorTest". The interface includes a navigation bar with "Home", "Workplace", and "Settings" options. Below the navigation bar, there is a toolbar with several icons, including a red box highlighting the "Save" icon (a floppy disk) and a red circle with the number "1" next to it. The main content area displays the "AMHP Report Form" with a sidebar on the left containing navigation links: "Service User Details", "Referral Details", "Further Details", "Background Information", and "AMHP'S Assessment of th...". The form content includes a section titled "Client previously known to services?" with radio buttons for "Yes" and "No". Below this is a section titled "Ethnic Origin" with a list of options: "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

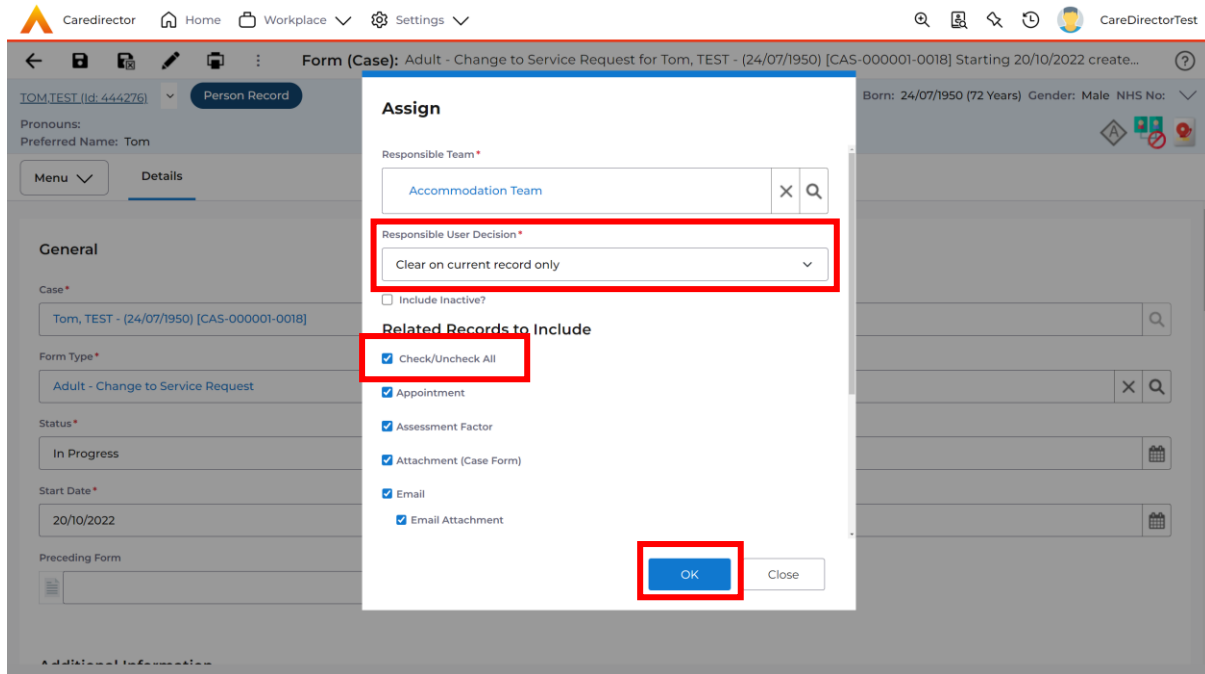
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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.



- 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)**.

The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' dropdown. The main content area shows a timeline of events:

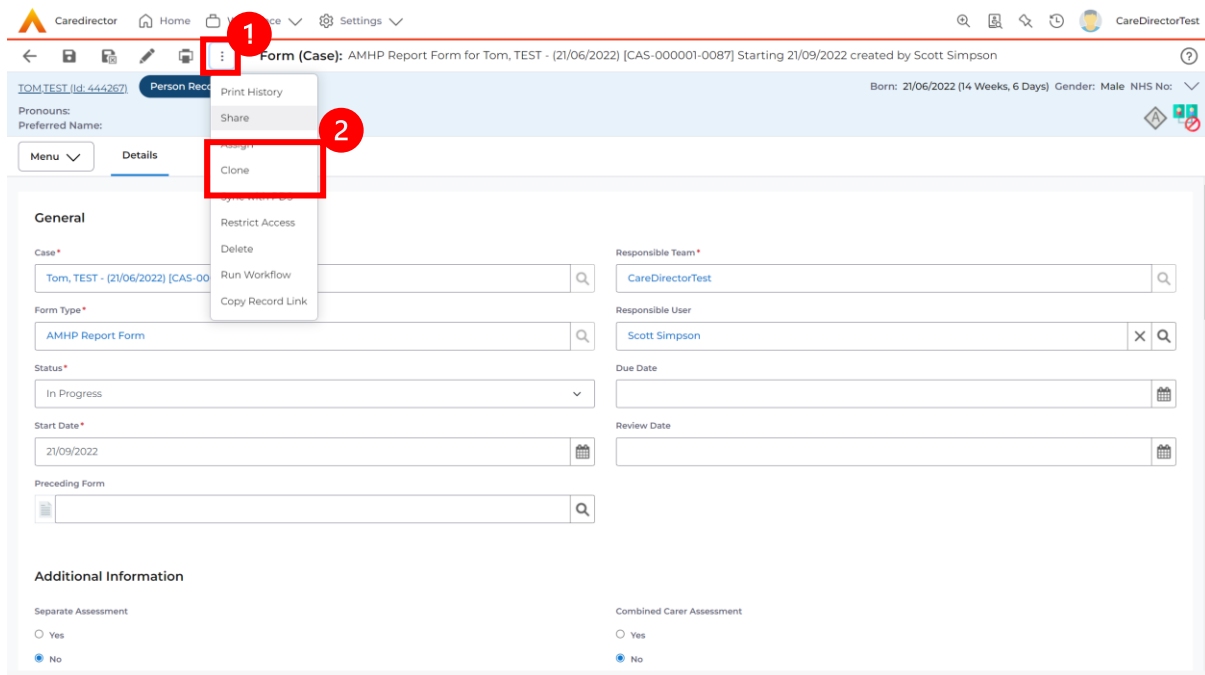
- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'.
- Case Involvement Created** (21/09/2022 12:37:20): A new record of case involvement was created by Scott Simpson.

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

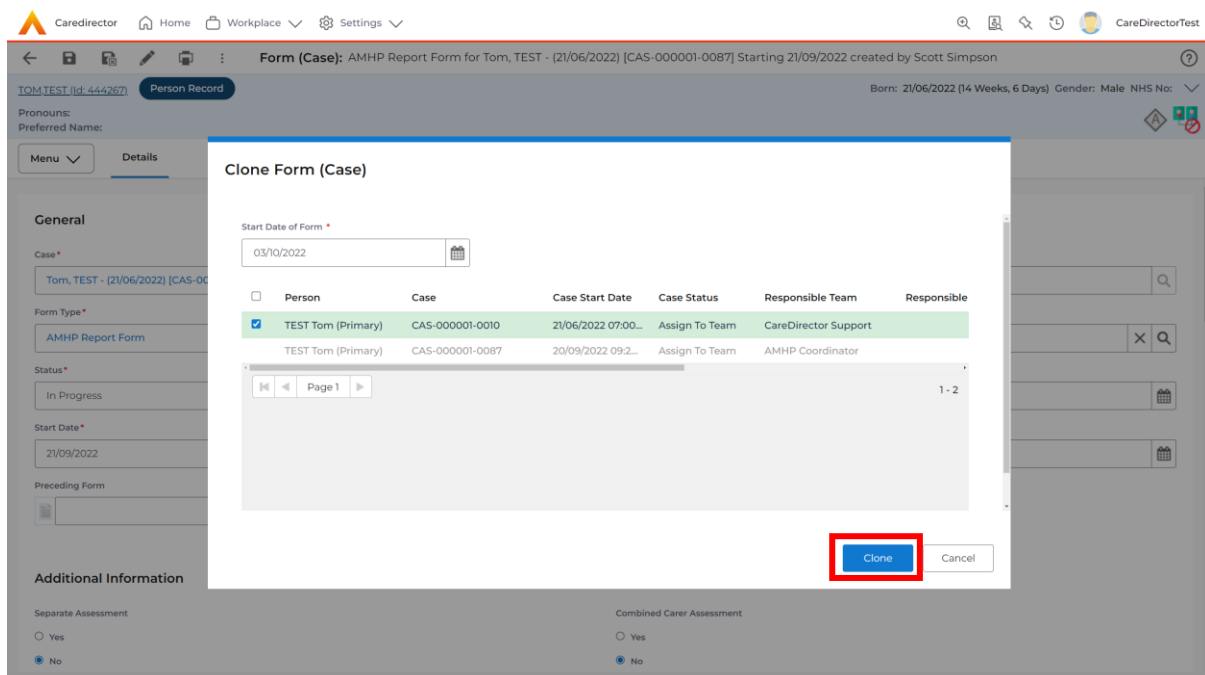
The screenshot shows the CareDirector interface for the 'Forms (Case)' view. The 'Related Records' dropdown is open, and the 'AMHP Report Form' is selected. The table below shows the details of the selected form:

	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		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 CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the user 'CD V6 Team' and the current page title 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. Below the header, there is a 'Person Record' tab and a dropdown menu for 'TOM TEST (id: 444267)'. The main content area is titled 'Details' and contains the following form fields:

- Case***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team***: CareDirectorTest
- Form Type***: Adult Care and Support Plan
- Responsible User**: Scott Simpson
- Status***: Closed
- Due Date**: 11/11/2022
- Start Date***: 09/11/2022
- Review Date**: (empty)
- Preceding Form**: (empty)
- Completion Details** section:
 - 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.

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area is titled 'Person Record' and shows details for 'TOM,TEST (Id: 444267)'. The form details are as follows:

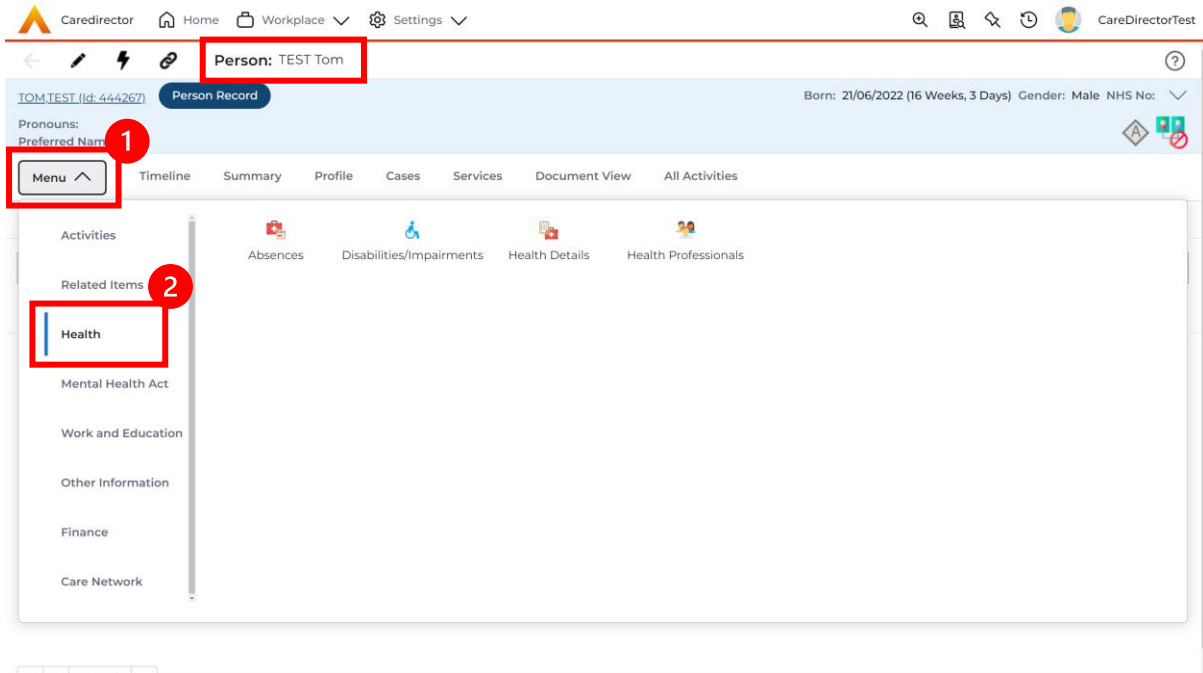
Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0010]
Form Type *	Occupational Therapy Conversation Record
Status *	Closed
Start Date *	10/11/2022
Responsible Team *	CareDirectorTest
Responsible User	Scott Simpson
Due Date	20/12/2022
Review Date	

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

This screenshot shows the same form as the previous one, but with the three-dot menu open. The menu options are: Share, Assign, Clone, Restrict Access, **Activate**, Delete, Run Workflow, and Copy Record Link. The 'Activate' option is highlighted with a red box and a '2' in a red circle. The form details remain the same as in the previous screenshot.

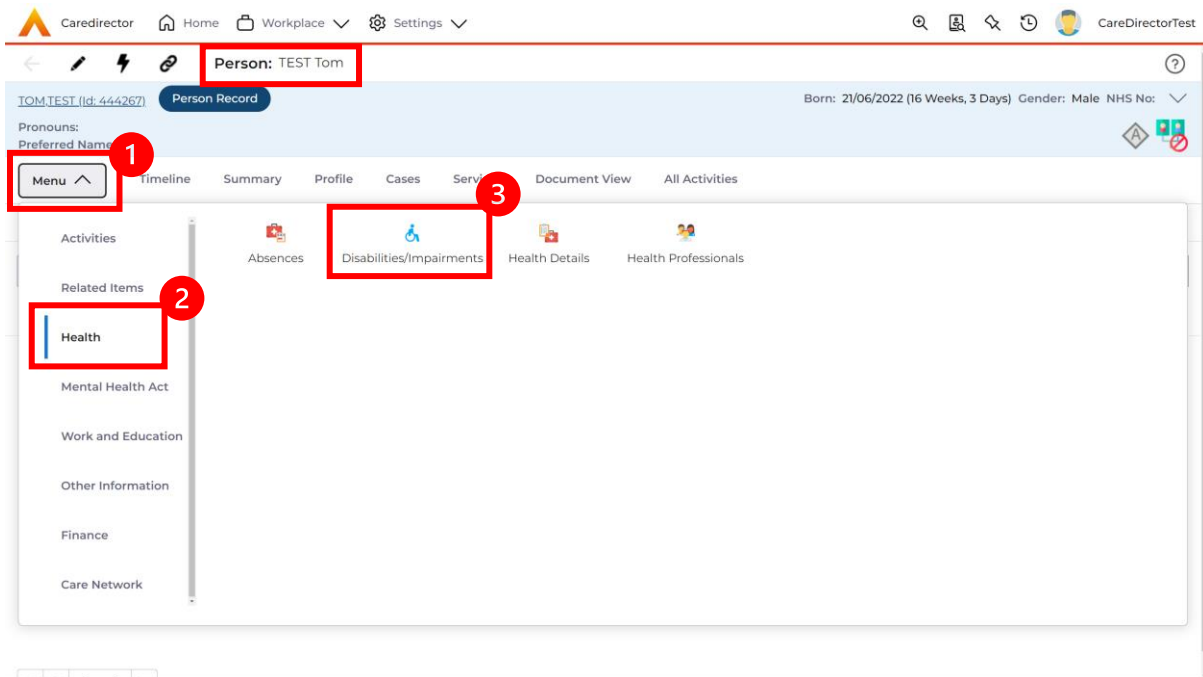
How to check Health Tab

1. Locate the **Person Record** and select **Menu, Health**. Choose appropriate option.

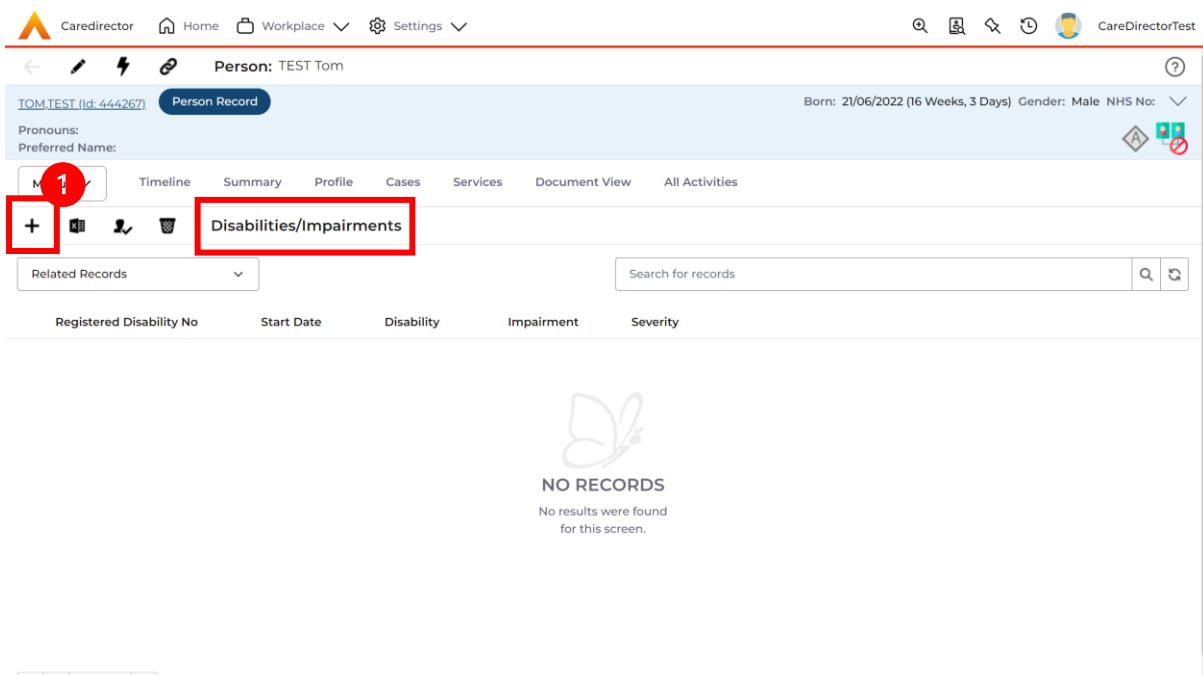


How to view/ input Visual Impairments

1. Locate the **Person Record** and select **Menu, Health, Disabilities/ Impairments**.



2. This will show all **Disabilities/ Impairments** this **Service User** may have. If a new one is needed, select the **Create New Record** on the toolbar.



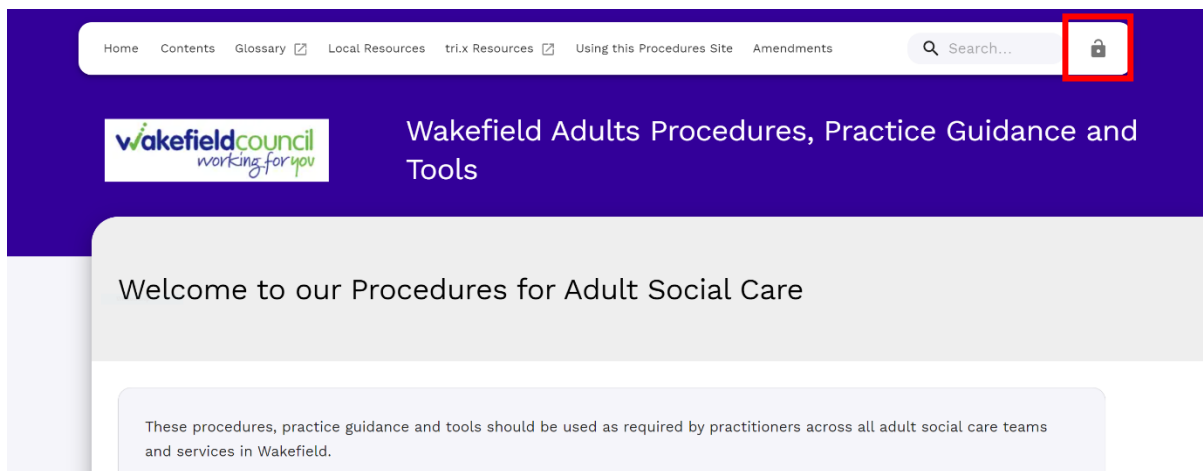
- Fill in the relevant information, select the type of **Disability** from the **Disability or Impairment** field using the **Lookup** function and **Impairment** or **Disability** skip logic field. Select **Save and Return to Previous Page** when finished.

The screenshot shows the CareDirector interface for creating a new Disability/Impairment record. The breadcrumb navigation at the top is 'Disability/Impairment: New', highlighted with a red box and the number 3. The 'Details' tab is selected, highlighted with a red box and the number 1. The form fields are as follows:

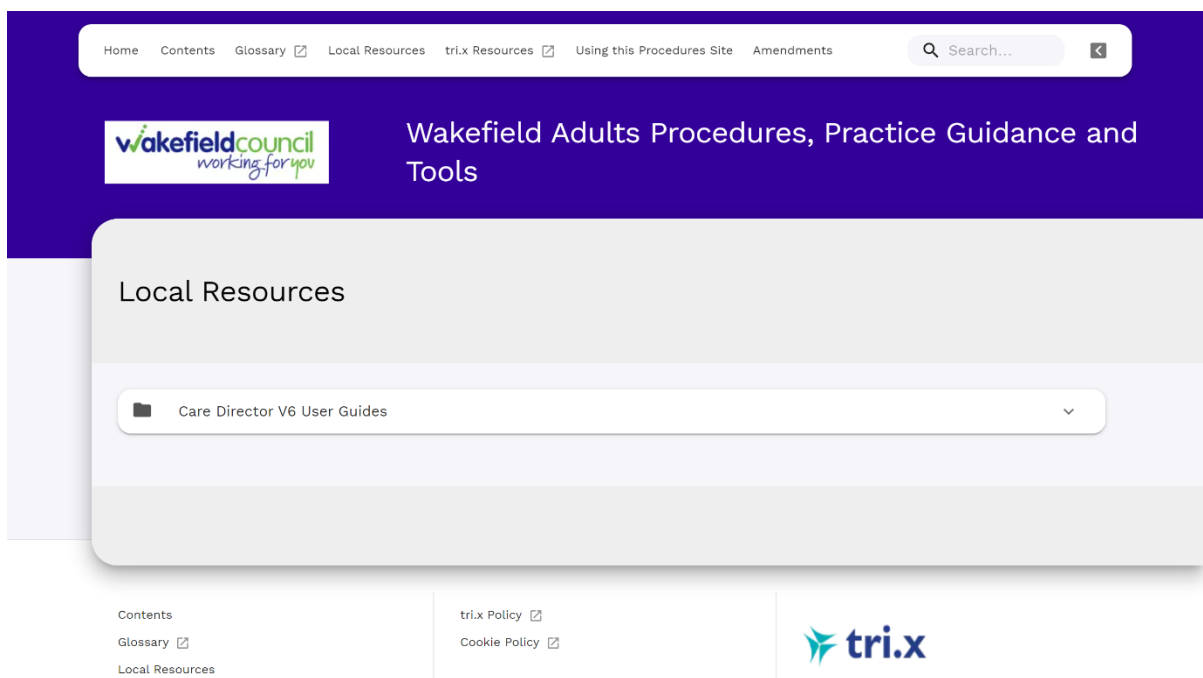
General	
Person *	Responsible Team *
TEST Tom	CareDirectorTest
Disability Or Impairment *	Registered Disability No
Impairment	
Impairment *	Severity
Partially Sighted	Moderate
Diagnosis Date	Notified Date
06/05/2016	
Start Date *	End Date
14/10/2022	
CVI Received Date	Onset Date
Review Date	

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
V1.0.1	Secondary Allocation	Scott Simpson	18/11/2022