



# Community Occupational Therapy V1.0.1

**Document** CareDirector Adults Community Occupational Therapy.  
**Purpose** Community Occupational Therapy daily tasks on CareDirector.  
**Version** V1.0.1  
**Owner** ICT Business Transformation Team  
**Last Updated** 18/11//2022

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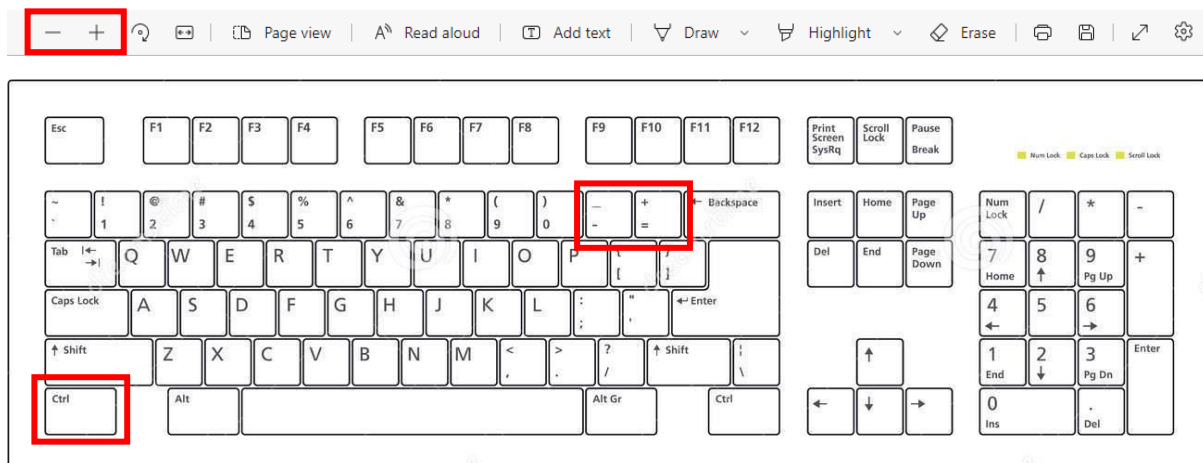
## Guide Information

### Before Live Access...

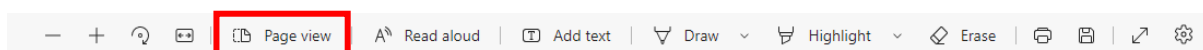
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### Guide Navigation

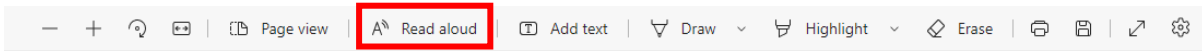
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold) and - (Press)** or **Ctrl (Hold) and + (Press)** on your keyboard.



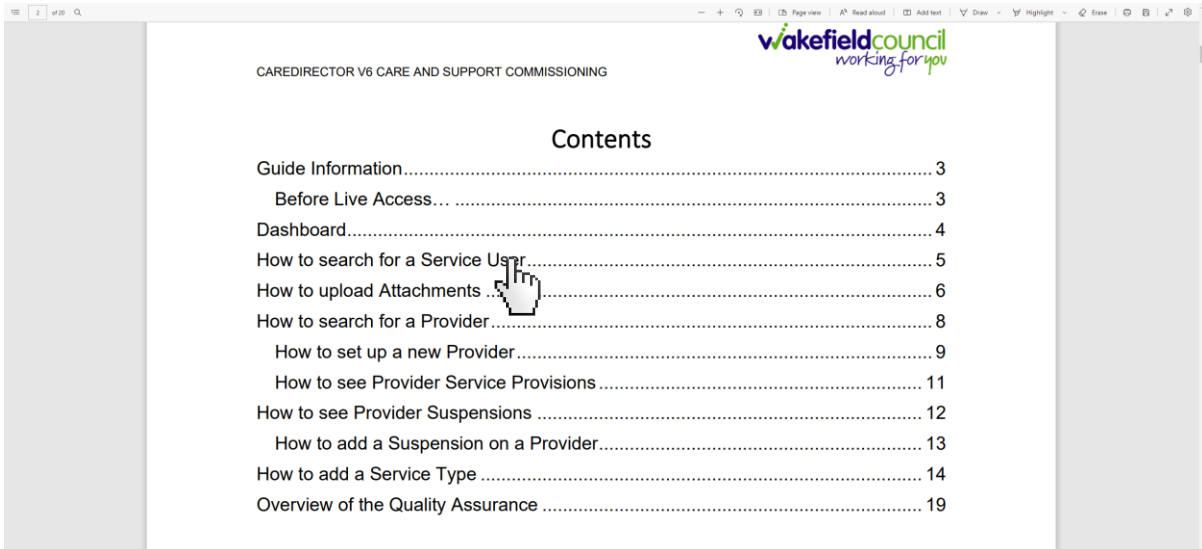
3. To put pages next to one another, select the **Page View** icon on the toolbar.



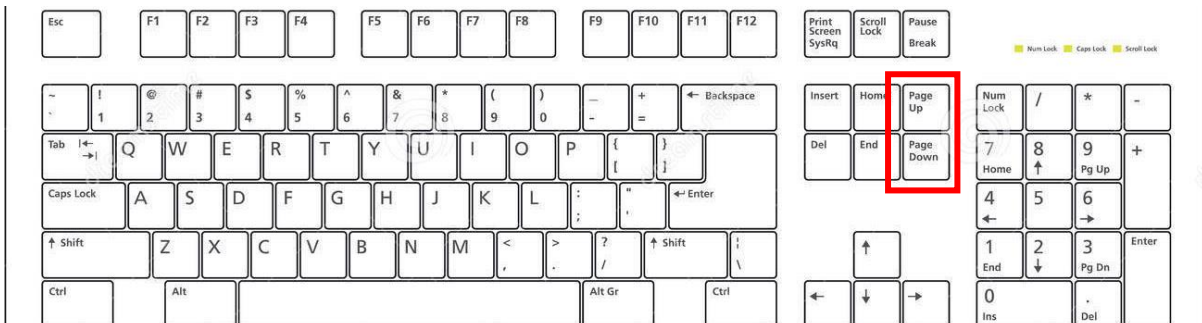
4. For auditory assistance, select **Read Aloud** from the toolbar.



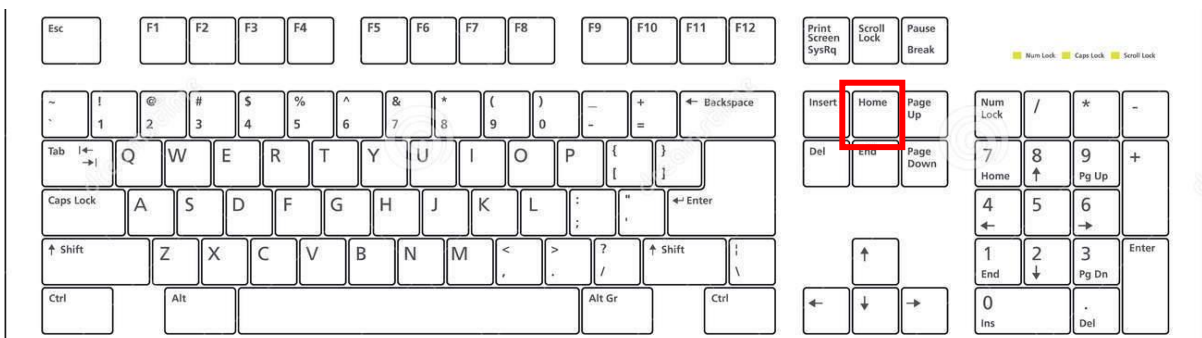
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

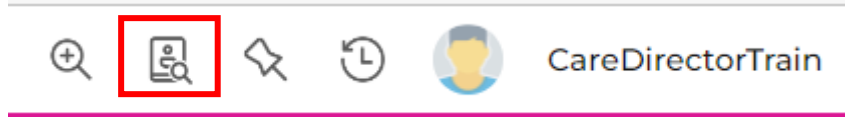


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## 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**.

Caredirector Home Workplace Set

← + Searches Before Create Allowed : 1

First Name  
Tom

Middle Name

Last Name  
MullenTest

Stated Gender

NHS No.

DOB

Use Date of Birth Range

Date of Birth From

Date of Birth To

Clear Filters 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).

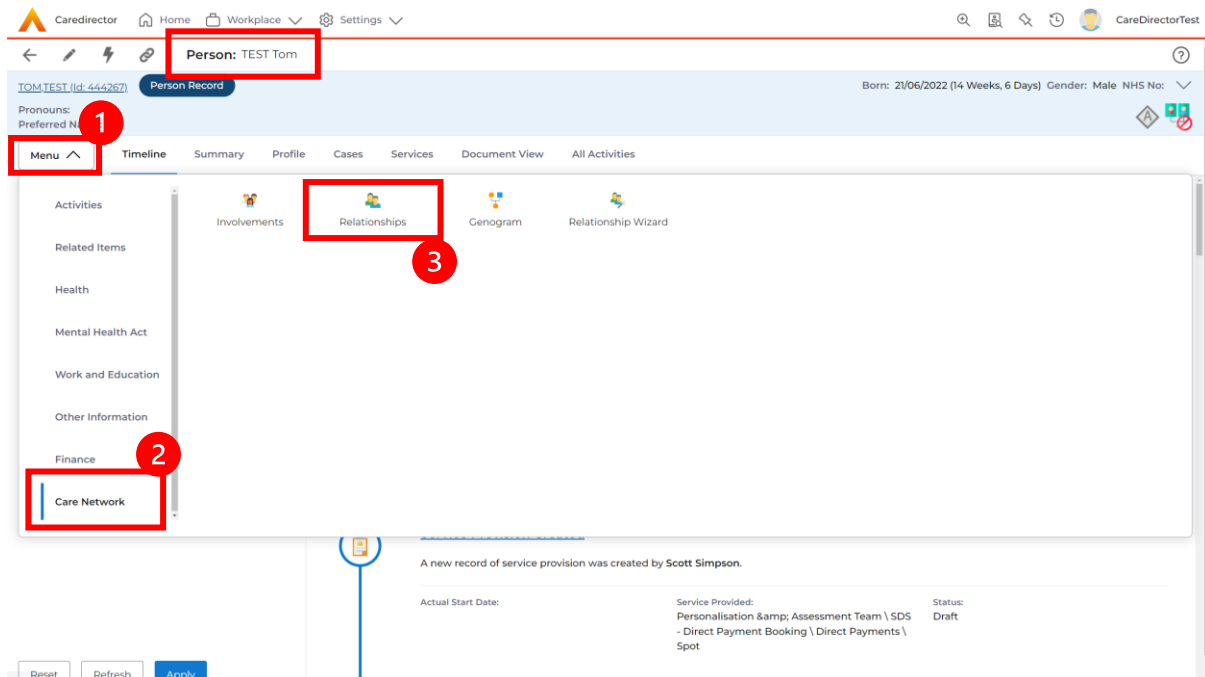
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case)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

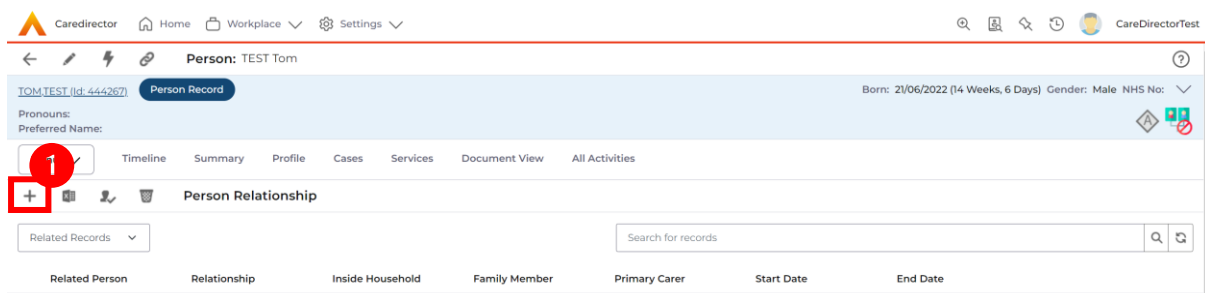
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no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

is a\*

To\*

**Reciprocal Relationship**

Person

is a\*

To

**Relationship Details**

Start Date\*

Responsible Team\*

End Date

Description

**Nature of Relationship to Primary Person**

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

4. When finished, select Save and Return to Previous Page. How to Search for a Case

## 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. At the top, the 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 '1' in a red circle. Below this, the 'Person Record' tab is active, and the 'Cases' tab is highlighted with a red box. The main content area displays a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' and 'Service Provision Created', both by Scott Simpson. The 'Form (Case) Created' entry shows a due date and form type 'AMHP Report Form'. The 'Service Provision Created' entry shows an actual start date and service provided 'Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot'.

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

The screenshot shows the CareDirector interface for the 'Cases' tab. The 'Cases' tab is highlighted with a red box and a '1' in a red circle. 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 two rows are highlighted with a red box and a '2' in a red circle. The first row is 'CareDirector Support' with a case date of 21/06/2022 07:00:00 and a contact reason of 'A - Adult Safeguarding'. The second row is 'AMHP Coordinator' with a case date of 20/09/2022 09:20:00 and a contact reason of 'A - AMHP Assessment'.

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

## 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: [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: [redacted]

Details

**Contact Details**

Case No \* [redacted]

Person \* Tom MullenTest [redacted]

Case Date/Time \* 07/10/2022 09:00

Initial Contact [redacted]

Date/Time Contact Received \* 06/10/2022 11:00

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
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team

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

Menu Timeline **Details**

**Assignment Information**

Case Status \*  
Assign To Team

Case Priority

Responsible User

Responsible Team \*  
AMHP Coordinator

Review Date

Last Assigned to Team Date  
20/09/2022

## 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: [dropdown]

Menu [dropdown] Timeline **Details**

**Assignment Information**

Case Status\* [Assign To Team] [lookup icon]

Case Priority [input] [lookup icon]

Responsible User [input] [lookup icon]

Responsible Team\* [AMHP Coordinator] [lookup 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] [lookup icon] [refresh icon]

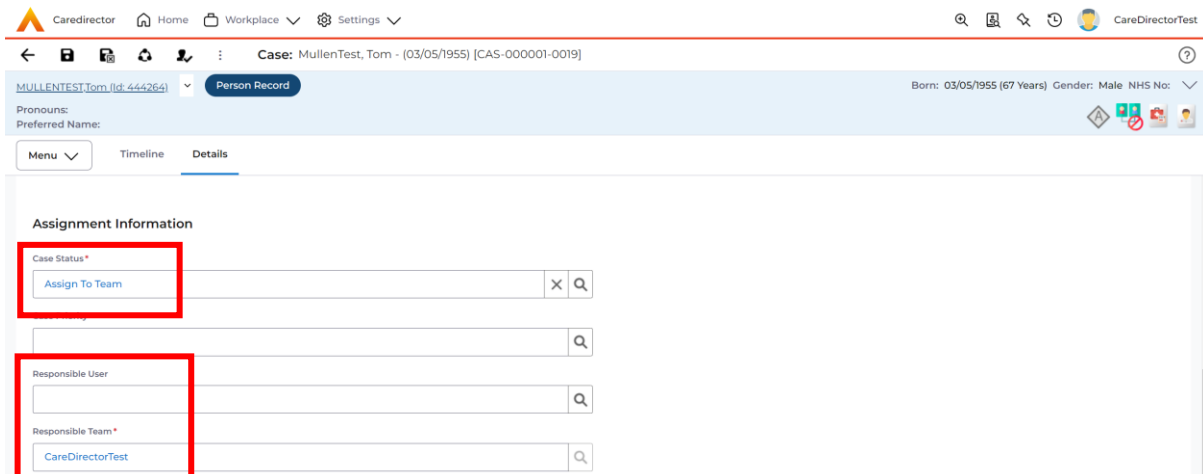
<input type="checkbox"/>	Name	Code	Gov C
<input type="checkbox"/>	Allocated	200013	
<input type="checkbox"/>	Assign To Team	200014	
<input type="checkbox"/>	Assigned to Team (unscheduled revie...		
<input type="checkbox"/>	Awaiting Allocation	200012	
<input type="checkbox"/>	Awaiting allocation (unscheduled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

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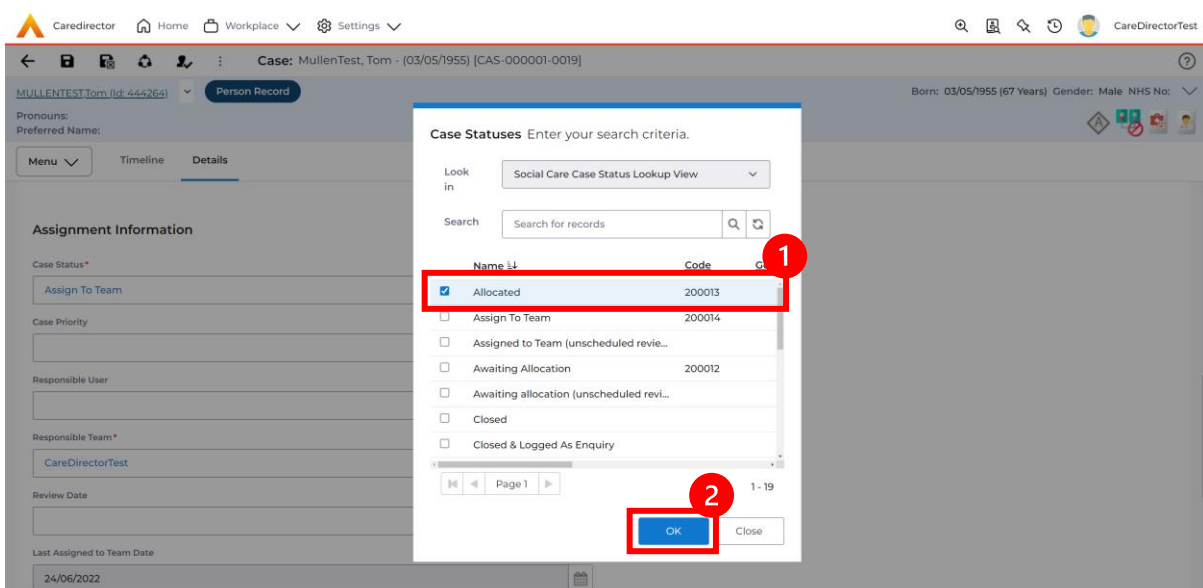
**OK** Close

## 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\*

🔍

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The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case details for 'MullenTest, Tom - (03/05/1955) [CAS-000001-0019]' are visible. The 'Assignment Information' section is active, showing 'Case Status' as 'Allocated', 'Responsible User' as an empty field, and 'Responsible Team' as 'CareDirectorTest'. A 'System Users' dialog box is open, prompting for search criteria (1). The dialog lists various system users (2), including 'My Business Unit Users', 'Active Managers', 'Deactivated Users', 'Lookup View', 'My Business Unit Users', 'My Default Team', and 'My Record'. The 'OK' button is highlighted (3).

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

The screenshot shows the CareDirector interface. The 'Assignment Information' section is active, showing 'Case Status' as 'Allocated', 'Case Priority' as an empty field, 'Responsible User' as 'Scott Simpson', 'Responsible Team' as 'CareDirectorTest', and 'Review Date' as an empty field. The 'Save' button in the toolbar is highlighted (1).

## 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 - (03/05/1995) [CAS-000001-0011]'. The 'Assignment Information' section is visible, with the following fields:

- Case Status \***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this dropdown, and another red box highlights the search icon to its right. A red circle with the number '1' is next to the search icon.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A dropdown menu showing 'Scott Simpson' with a search icon.
- Responsible Team \***: A dropdown menu showing 'CareDirector' with a search icon.
- Review Date**: A date picker icon.

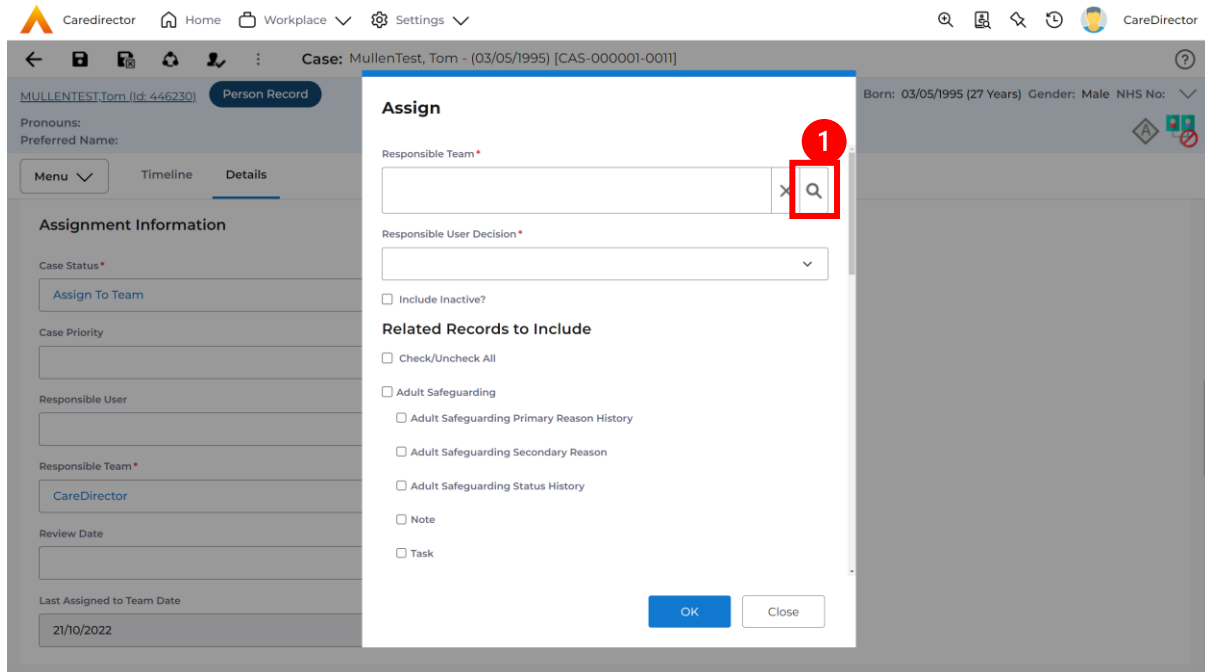
At the top of the interface, a red box highlights the 'Person Record' button, and a red circle with the number '2' is next to it.

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.

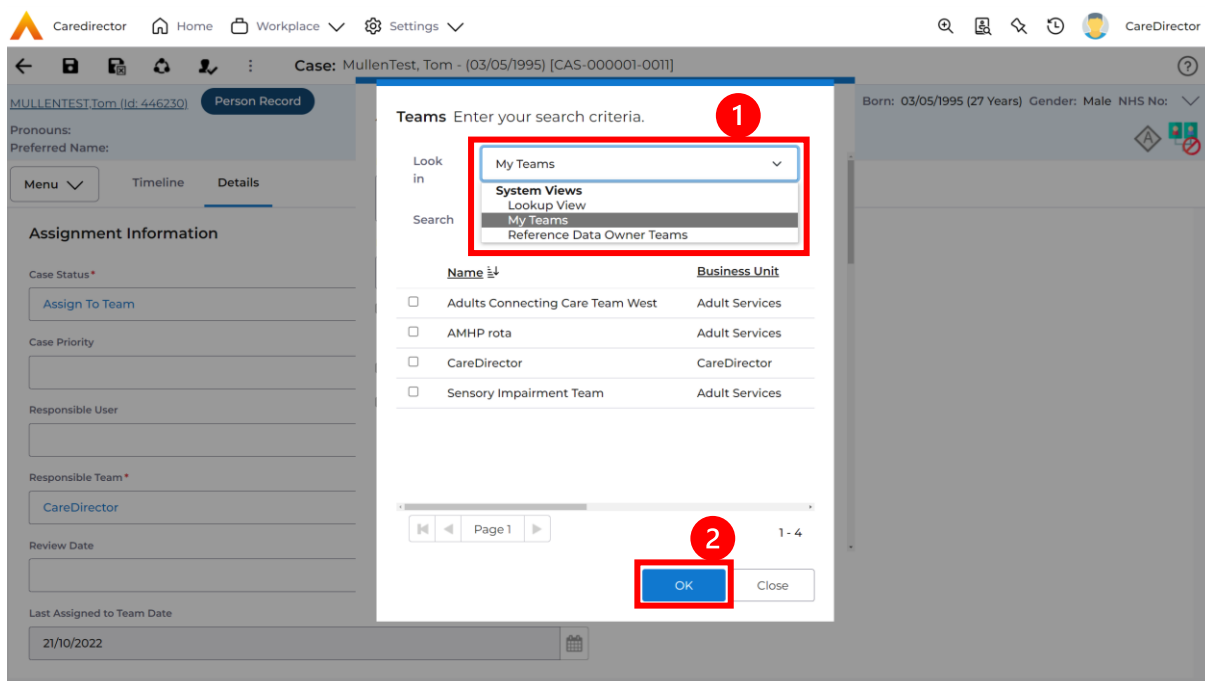
The screenshot shows the same CareDirector interface as above, but with the 'Responsible User' field now empty. In the toolbar at the top, a red box highlights the 'Assign this record to another team' button, and a red circle with the number '1' is next to it.



- 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**.



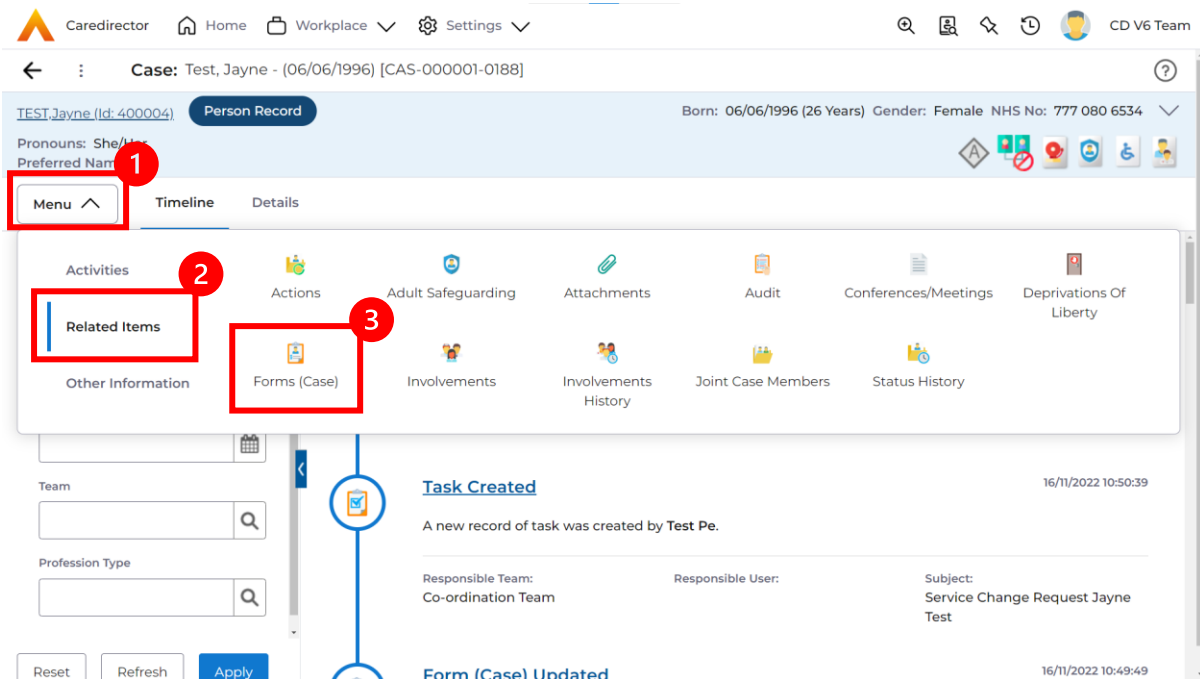
- The next section is going to ask what you want to do about the **Responsible User**. Due to the **Responsible User Workflow** being triggered, removing the current **Responsible User** from the field. We can leave this as **Do Not Change** however, if it has not removed it (you can check by looking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

The screenshot shows the CareDirector interface for a case named 'MullenTest, Tom'. A modal window titled 'Assign' is open, allowing the user to assign a team and a responsible user. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown is set to 'Do not change'. In the background, the 'Responsible User' field is highlighted with a red box, indicating it is the focus of the next step.

- 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.

The screenshot shows the CareDirector interface for a case titled "Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]". The "Details" tab is selected and highlighted with a red box. The "Contact Details" section is visible, containing fields for Case No\* (CAS-000001-0010), Person\* (TEST Tom), Case Date/Time\* (21/06/2022, 07:00), Contact Received By\* (Scott Simpson), Contact Reason\* (A - Adult Safeguarding), Presenting Priority, Initial Contact, Date/Time Contact Received\*, and Referral Reason.

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

The screenshot shows the CareDirector interface for the same case. The toolbar is visible, and the "Three Dots" menu is open, with the "Clone" option highlighted by a red box and a red circle with the number "2". The "Details" tab is also visible in the background.

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.

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

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

Search [2]

- 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.

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 ^ (1) Timeline Details (2)

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

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 ^ (1) 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 currently populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' button in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'. The user's profile information at the top right shows 'Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [redacted]'.

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**.

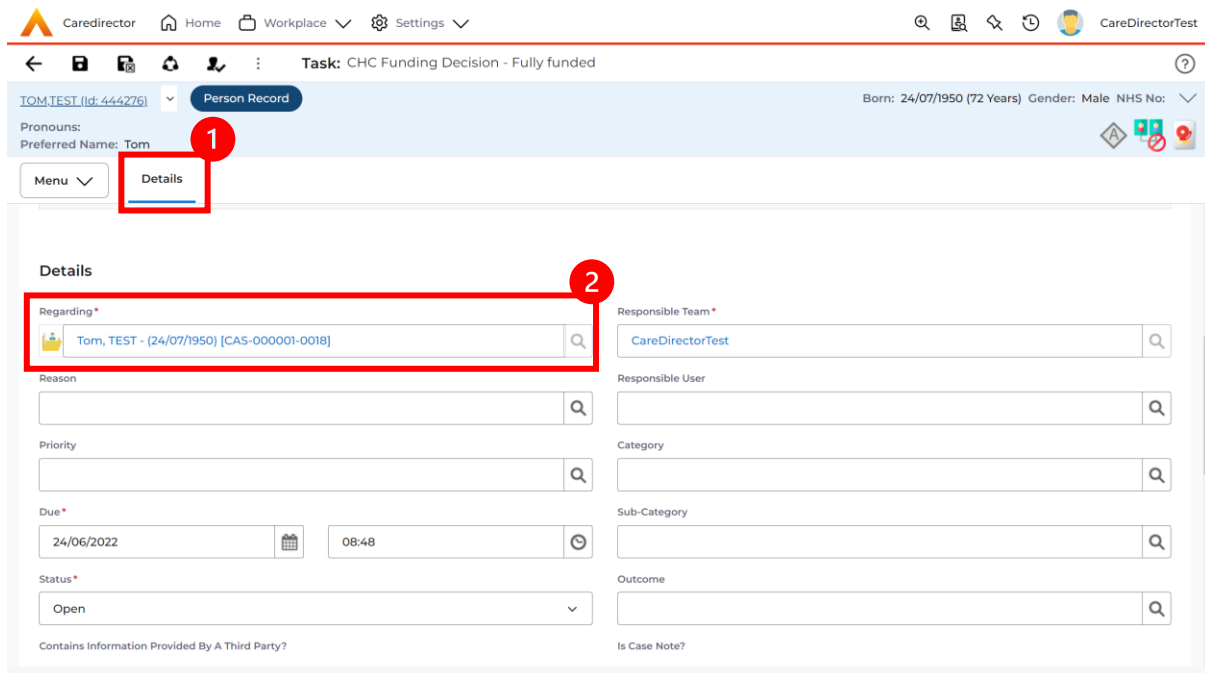
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, a breadcrumb trail shows 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955) [CAS-000001-000...'. The main content area is titled 'Person Record' and shows details for 'MULLENTTEST, Tom (Id: 444264)'. The 'Status' dropdown menu is open, showing options: Complete, Not Started, In Progress, Closed, Cancelled, and Approved. The 'Complete' option is highlighted. A red box highlights the dropdown menu, and a red circle with the number '1' is next to the 'Form Type' field.

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.

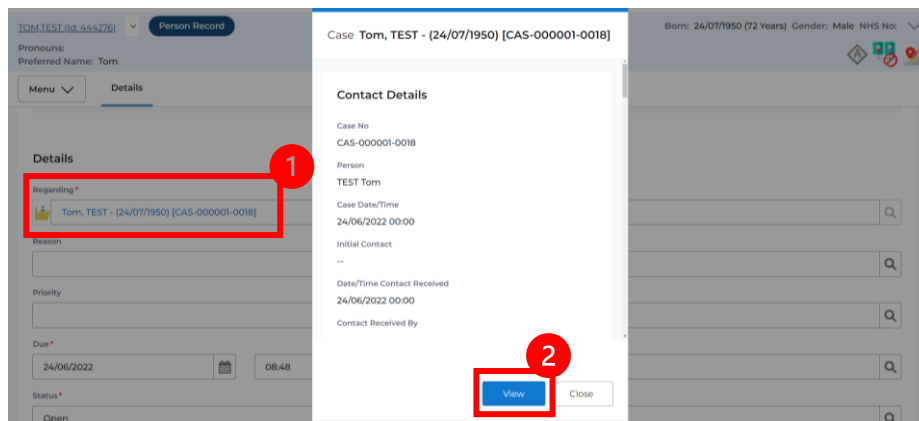
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, a breadcrumb trail shows 'Task: Test Task for Case'. The main content area is titled 'Details' and shows details for 'MULLENTTEST, Tom (Id: 444264)'. The 'Activate' option is selected in the dropdown menu. A red box highlights the dropdown menu, and a red circle with the number '2' is next to the 'Activate' option.

## 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' 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 CareDirector interface for creating a new task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom - (03/05/1995) [CAS-000001-001]'. The 'Details' section contains several fields: 'Regarding' (with a red box and '2'), 'Responsible Team' (Sensory Impairment Team), 'Responsible User' (Scott Simpson, with a red box and '1'), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Category', 'Sub-Category', and 'Outcome'. There are also radio buttons for 'Contains Information Provided By A Third Party?' and 'Is Case Note?'.

## How to Allocate an existing Activity to another team

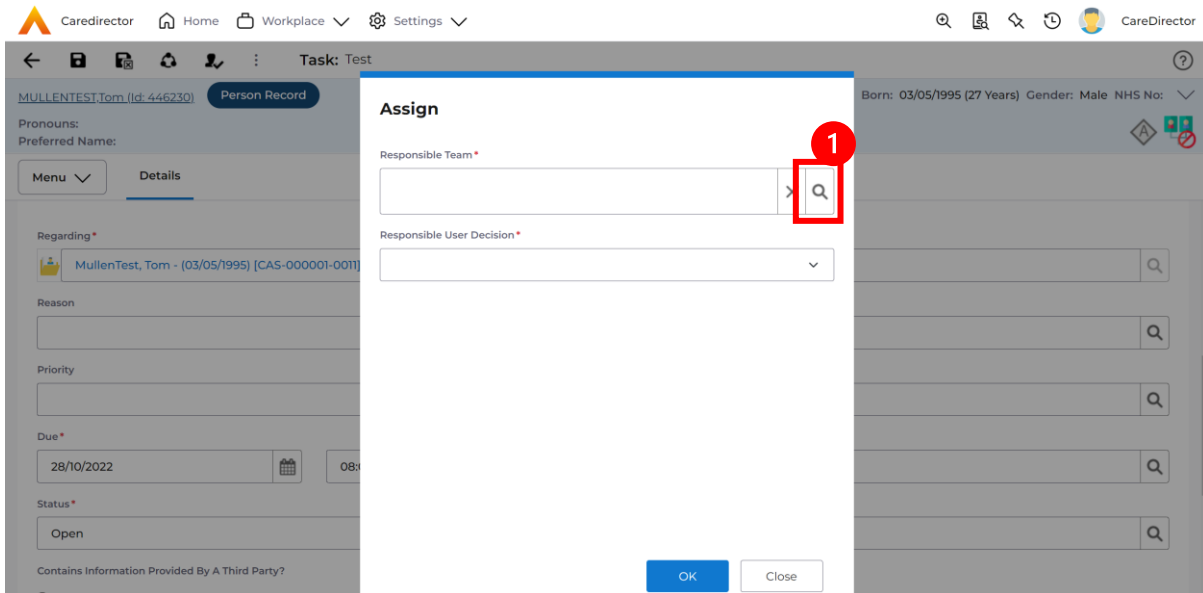
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the 'Details' view of a task record. The 'Responsible User' field contains 'Scott Simpson' and has a red box around the 'X' icon next to it, with a red circle containing the number '1' pointing to it. Other fields include 'Regarding' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due' (28/10/2022, 08:00), 'Status' (Open), and 'Responsible Team' (Sensory Impairment Team).

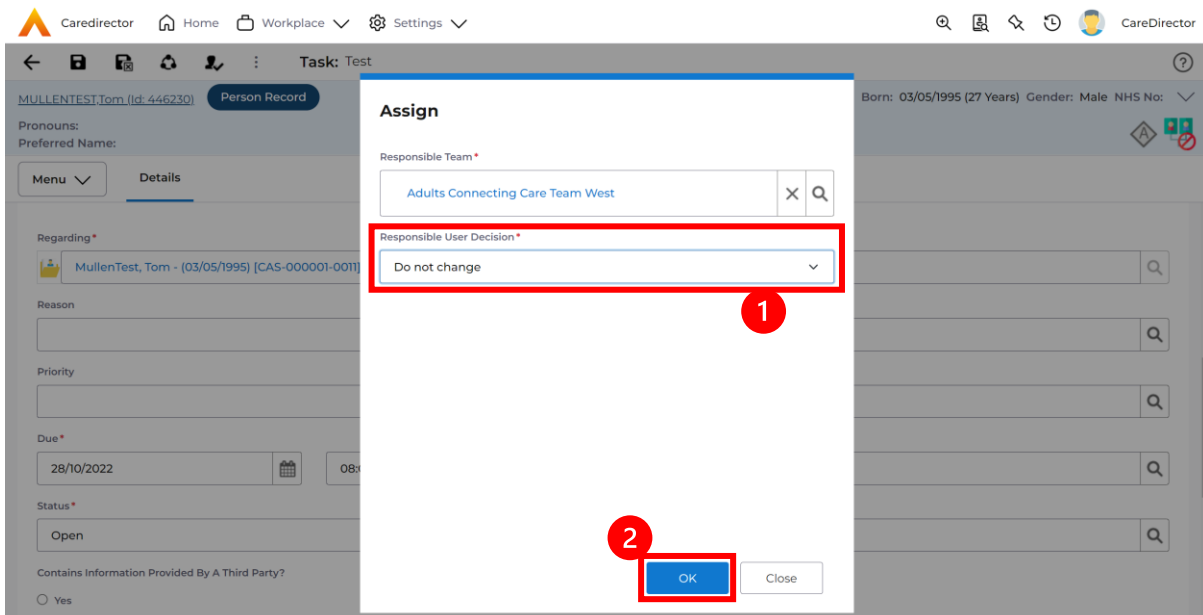
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same task record as above, but the 'Assign' icon in the top toolbar is highlighted with a red box and a red circle containing the number '1'. The 'Responsible User' field is now empty, and the 'Responsible Team' field still shows 'Sensory Impairment Team'.

- 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.



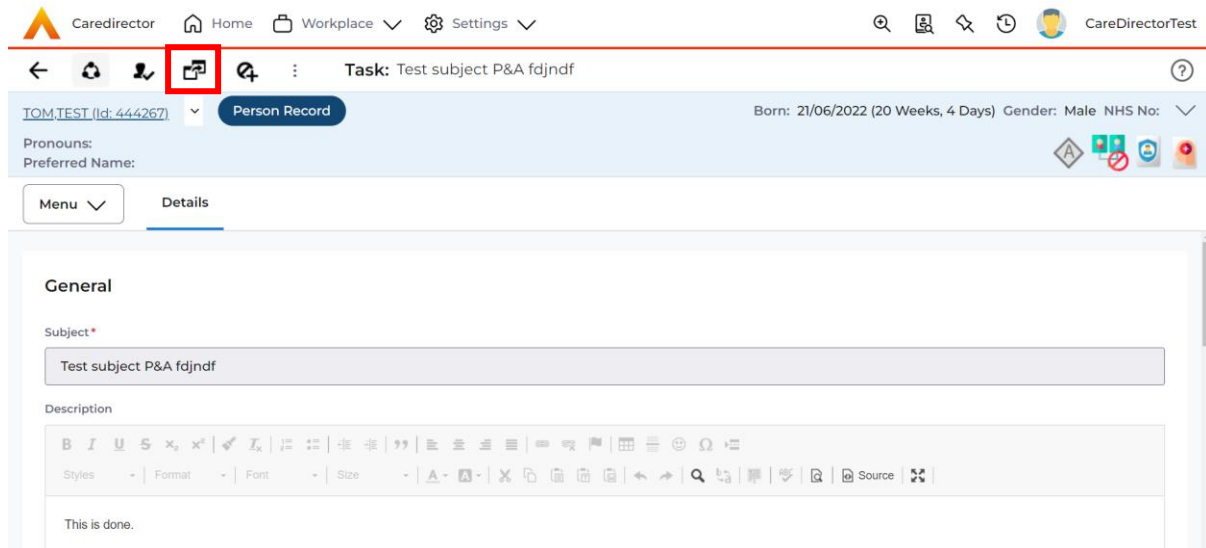
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



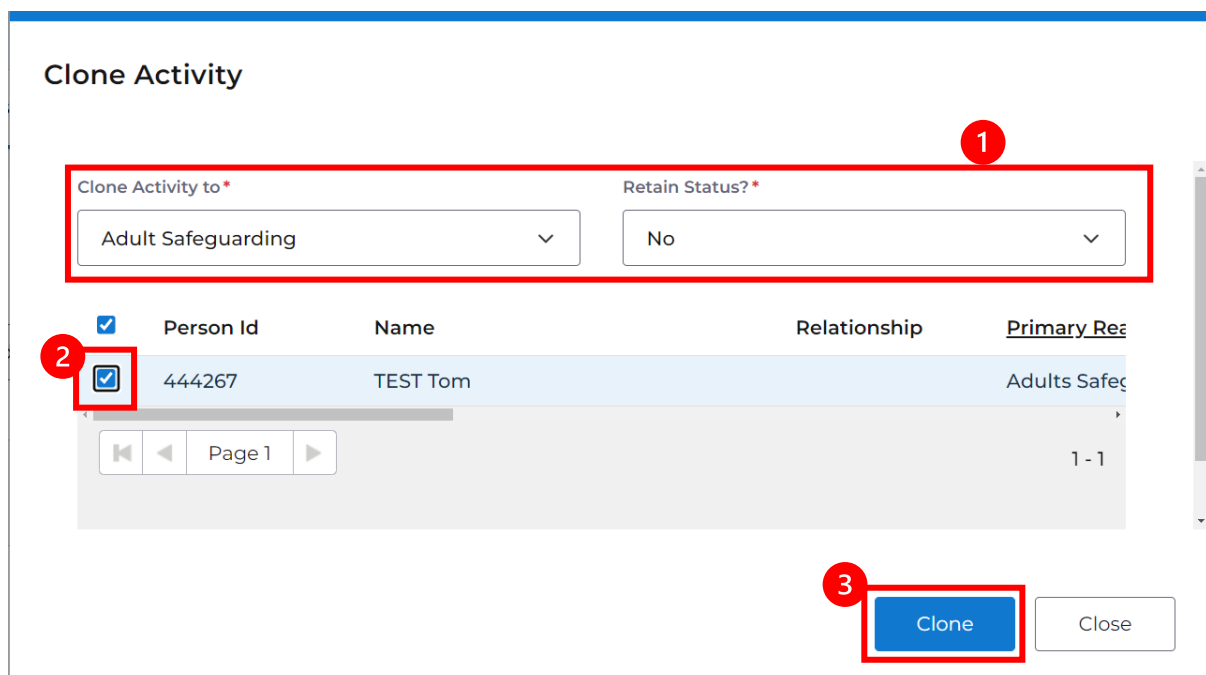
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

## How to Clone Activities

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



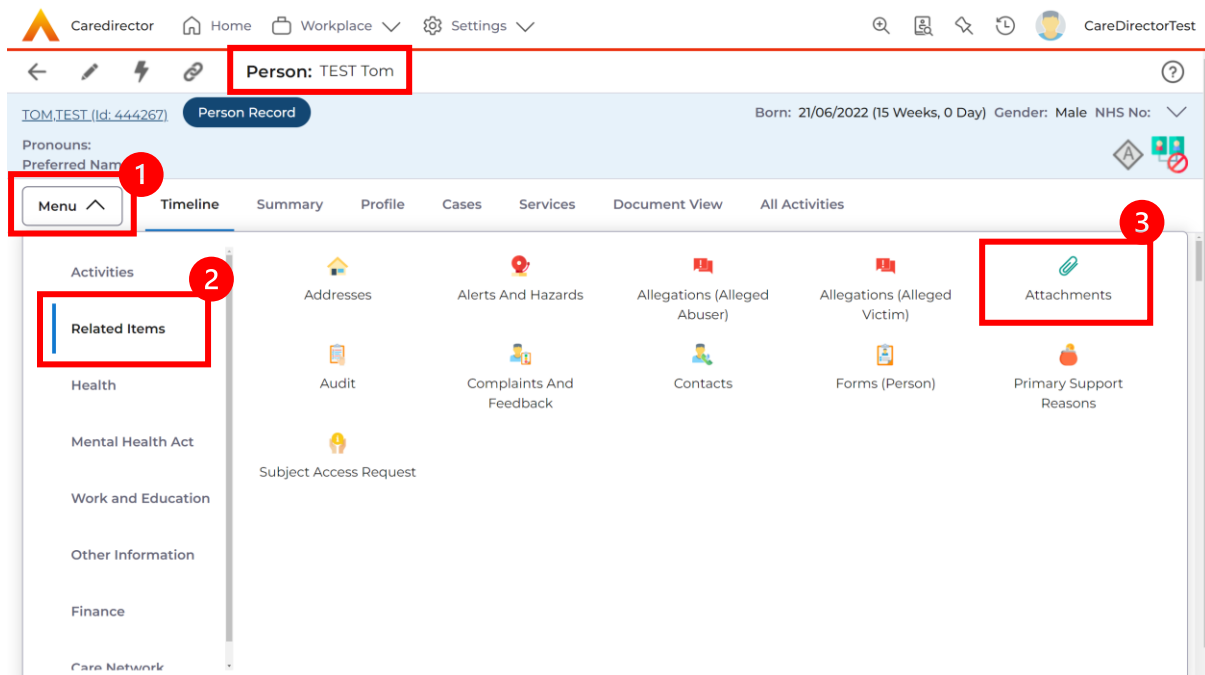
2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.



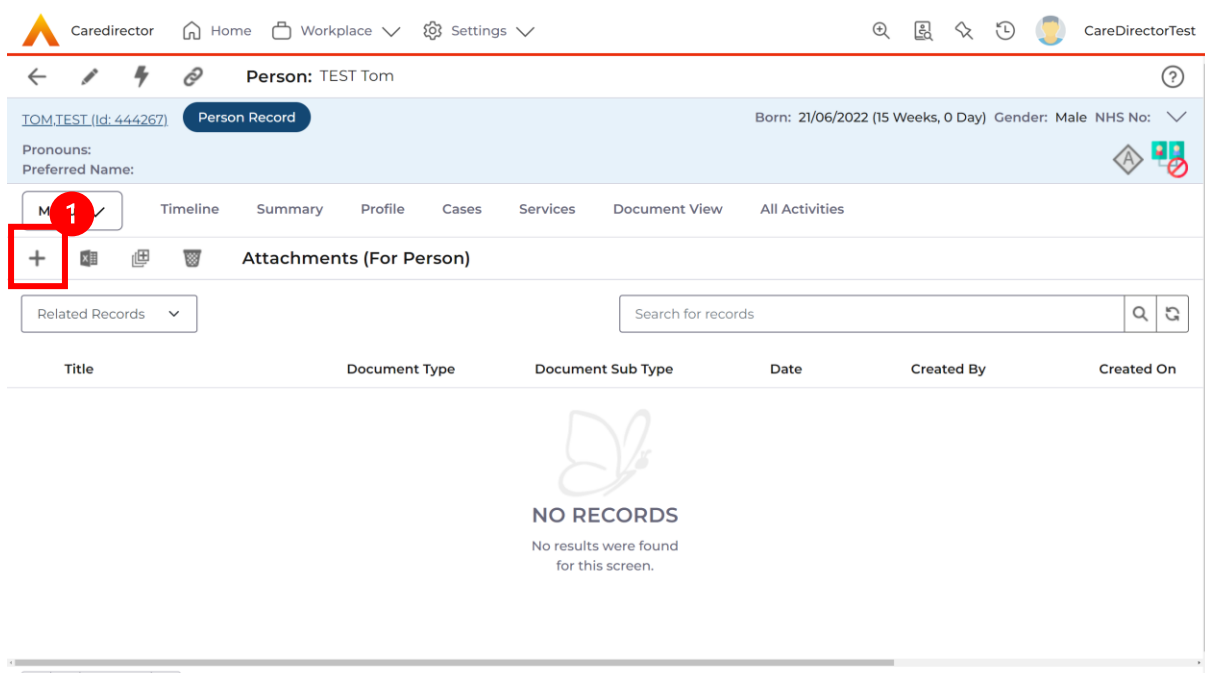


## How to upload Attachments

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**.



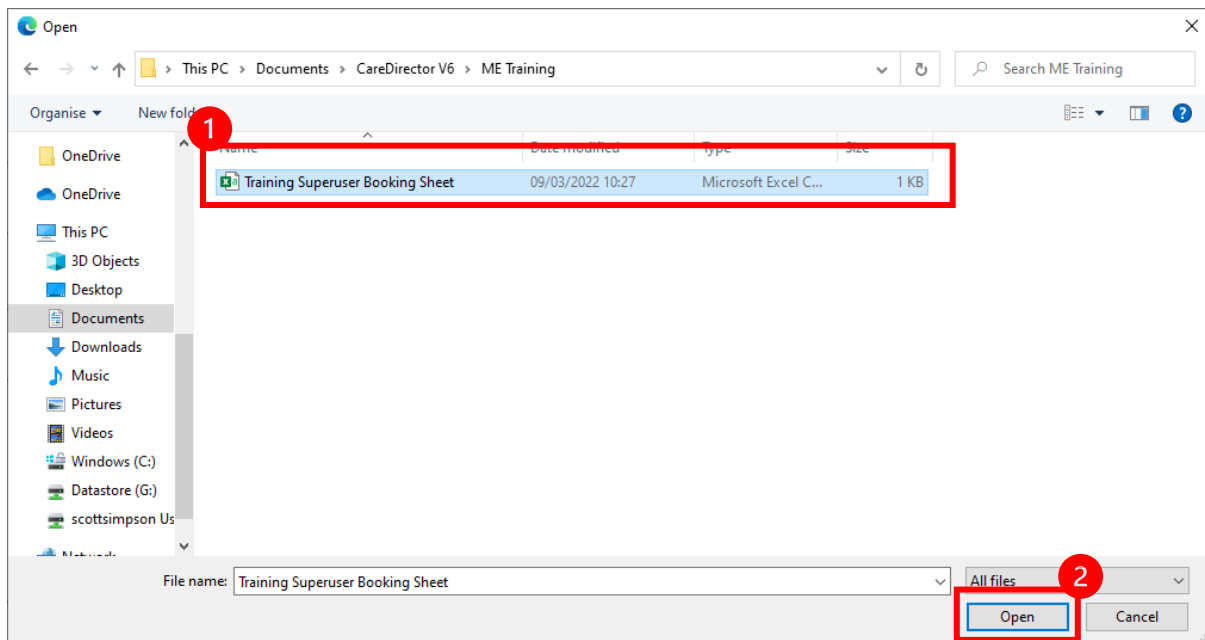
2. When opened, select the **Create New Record** from the toolbar.



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', 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).

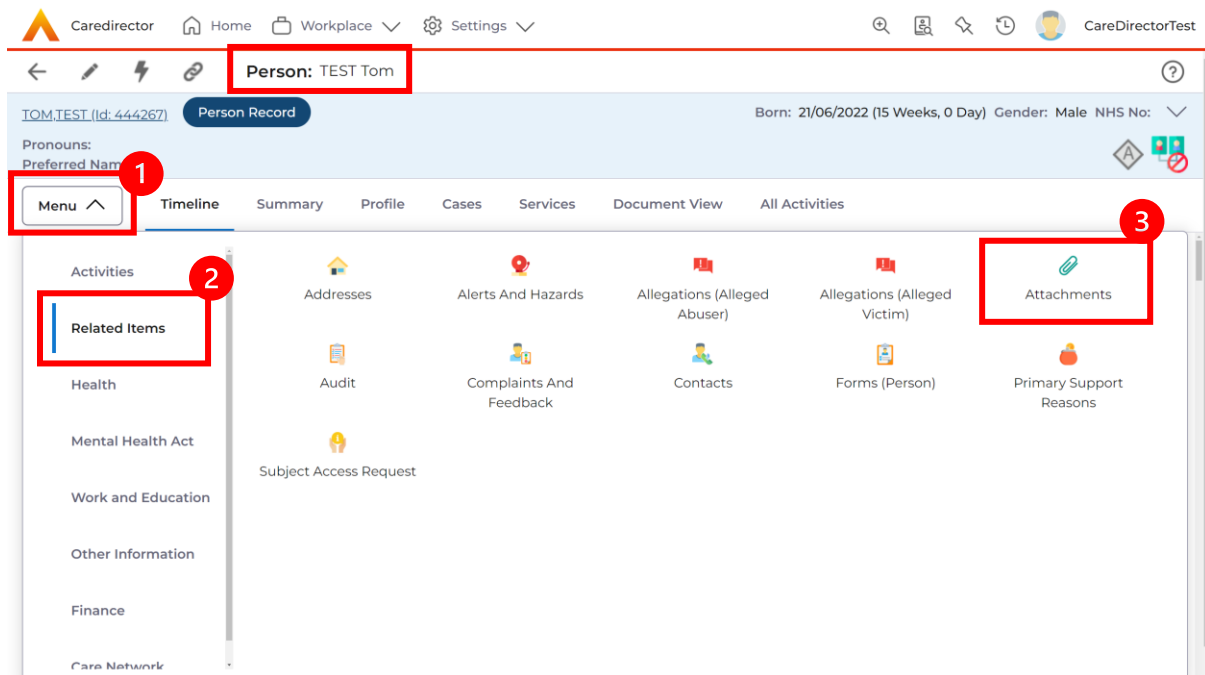
4. Select a **File** from your computer/ SharePoint and select **Open**.



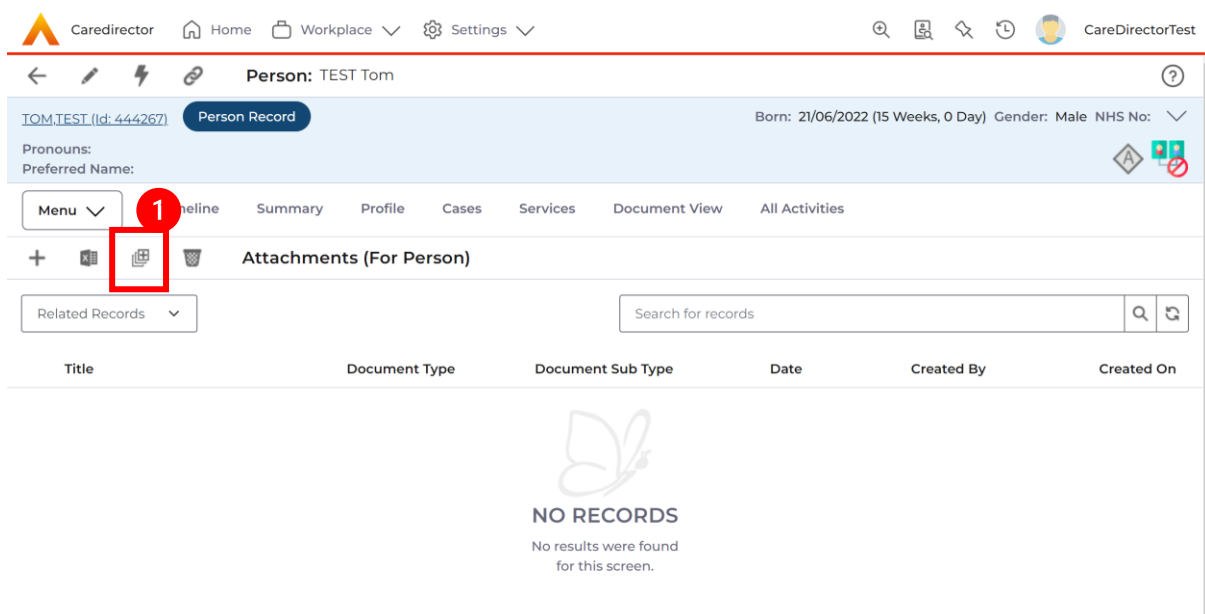
5. After uploading, the file name will appear and then select **Save** from the toolbar.

## How to upload multiple attachments

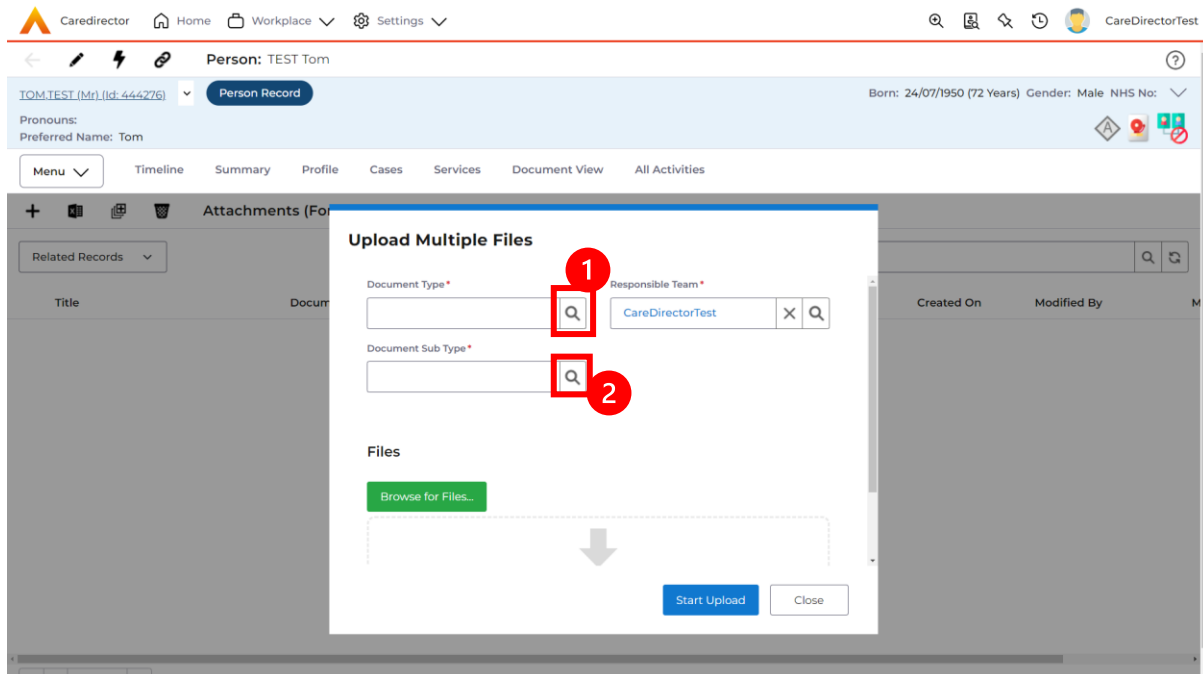
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



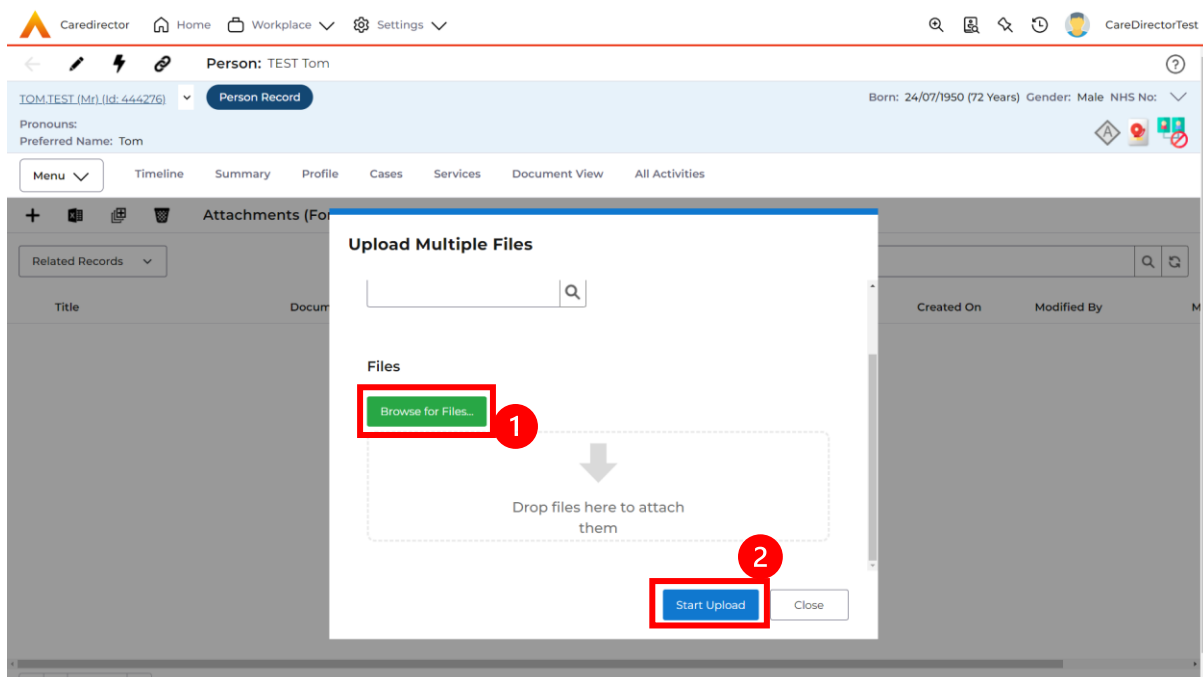
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 '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', and the 'Related Items' option is selected. The 'Forms (Case)' option is highlighted with a red box and a '3'. The main content area shows a timeline of events: 'Form (Case) Created' (21/09/2022 13:04:25), 'Case Involvement Updated' (21/09/2022 12:23:12), and 'Case Involvement Created' (21/09/2022 12:17:20).

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 search bar and a table of related records. The table has columns for Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. One record is shown: 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	Sign
	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 | **Related Items** | Actions | Adult Safeguarding | Attachments | Audit | Deprivations Of Liberty | **Forms (Case)** | Involvements

Other Information | Involvements History | Joint Case Members | Status History

Team: [input] | Profession Type: [input]

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 | 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)**.

The screenshot shows the CareDirector interface for a case titled 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is viewing the 'Person Record' for TOM.TEST (id: 444267). The toolbar at the top contains a '+' icon, which is highlighted with a red box and a red circle containing the number 1. To the right of the '+' icon, the text 'Forms (Case)' is also highlighted with a red box. Below the toolbar, there is a table of related records with the following data:

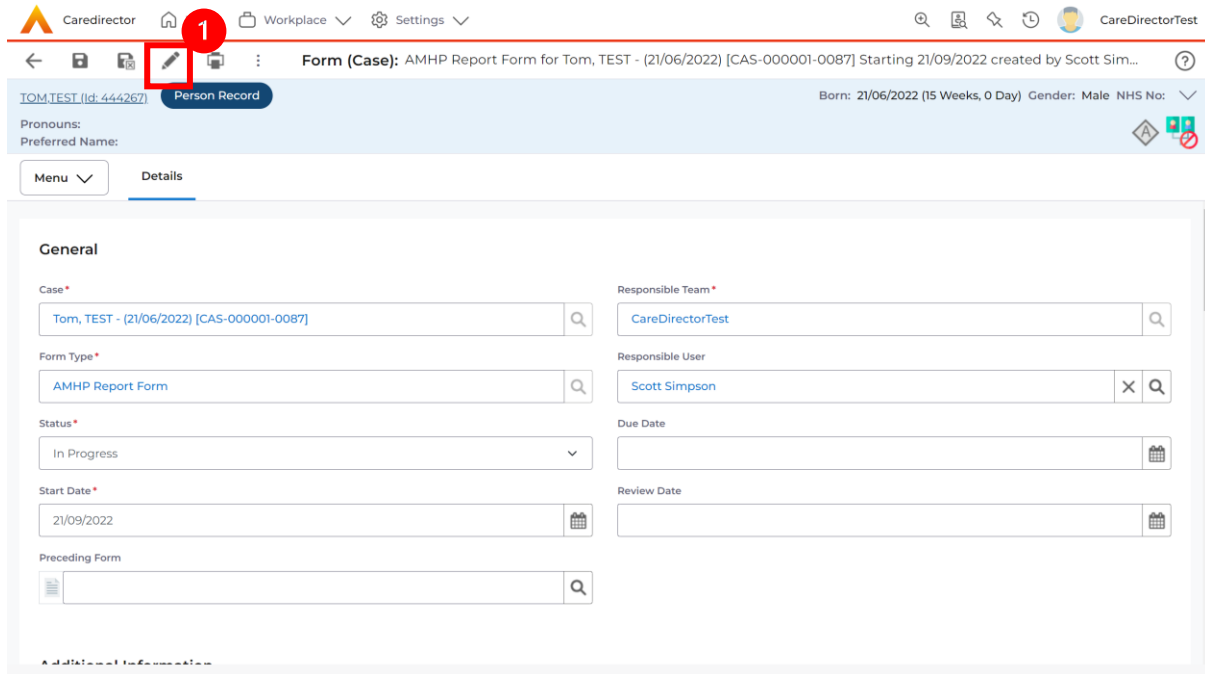
Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest	

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

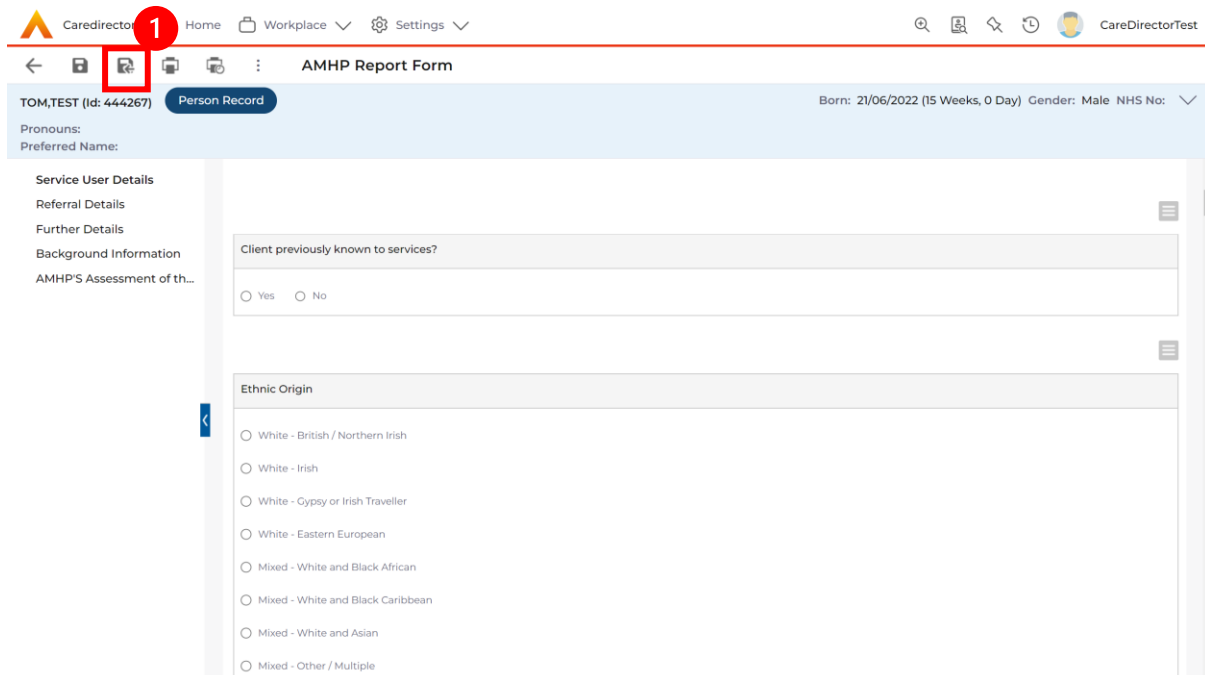
The screenshot shows the 'Form (Case): New' details page in CareDirector. The user is viewing the 'Person Record' for TOM.TEST (id: 444276). The 'Details' tab is selected and highlighted with a red box. The 'Form Type' field is highlighted with a red box, and its lookup icon is circled in red with the number 1. The form contains the following fields:

- Case \***: Tom, TEST - (24/07/1950) [CAS-000001-0018]
- Responsible Team \***: CareDirectorTest
- Form Type \***: (Lookup icon highlighted)
- Responsible User**: (Lookup icon)
- Status \***: In Progress
- Due Date**: (Calendar icon)
- Start Date \***: 21/10/2022
- Review Date**: (Calendar icon)
- Preceding Form**: (Lookup icon)

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



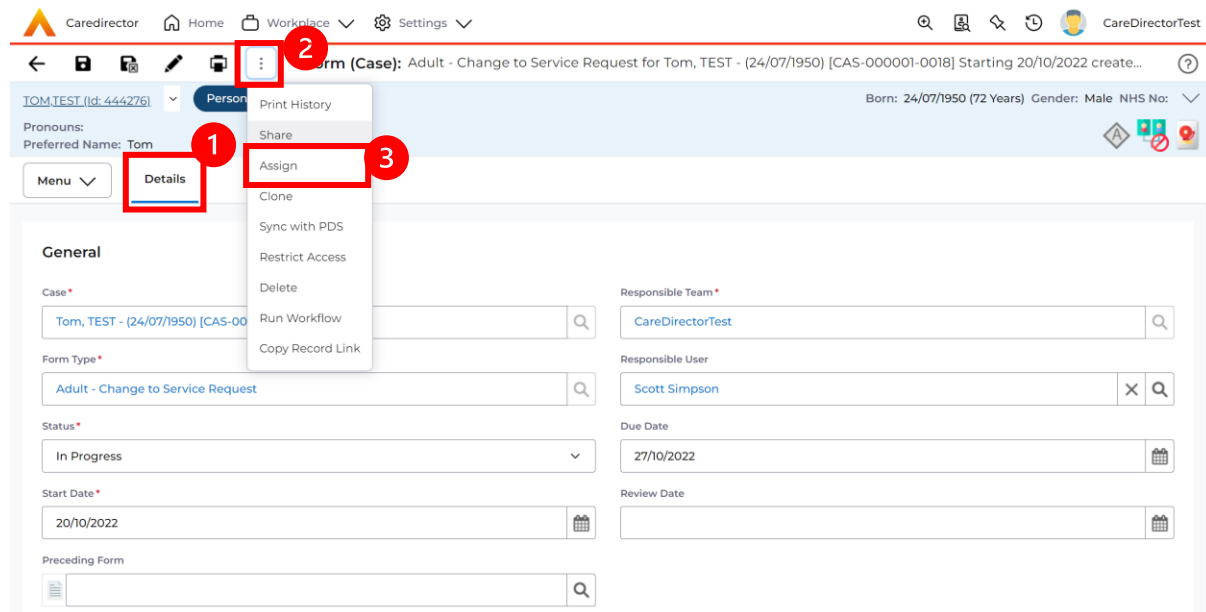
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.



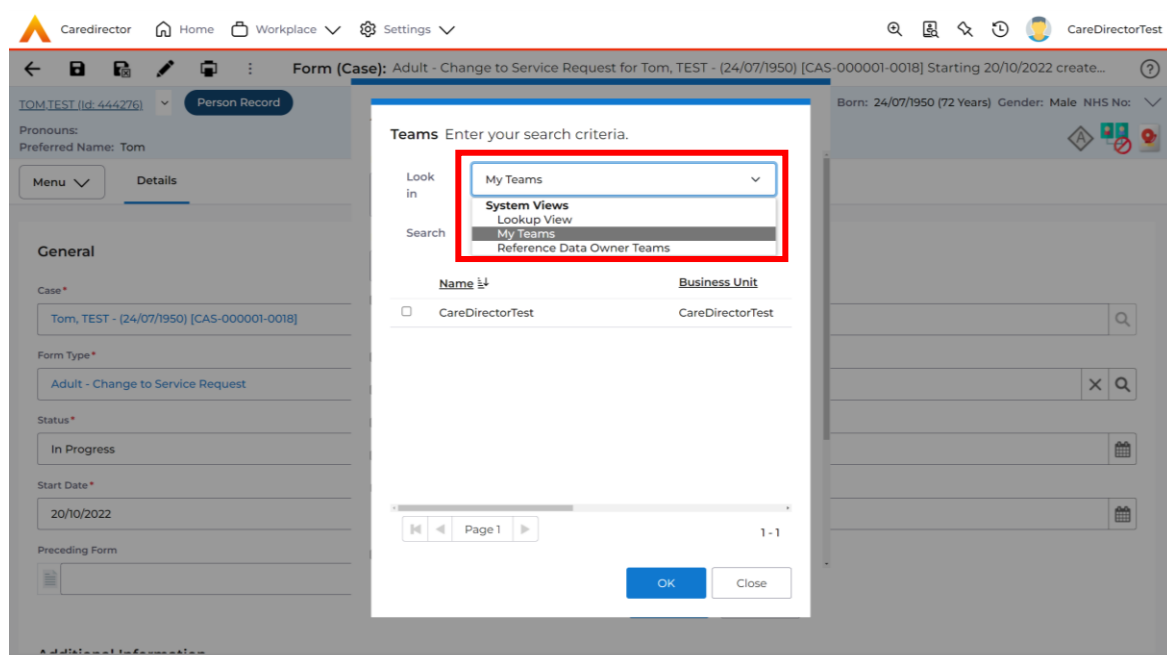


## How to Allocate a Form

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



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



- 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 CareDirectorTest application. The dialog is titled 'Assign' and contains the following fields and options:

- Responsible Team \***: A search field containing 'Accommodation Team'.
- Responsible User Decision \***: A dropdown menu with the selected option 'Clear on current record only'.
- Include Inactive?**: A checkbox that is currently unchecked.
- Related Records to Include**: A list of checkboxes, all of which are checked:
  - Check/Uncheck All
  - Appointment
  - Assessment Factor
  - Attachment (Case Form)
  - Email
  - Email Attachment
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

## How to Clone a Form

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

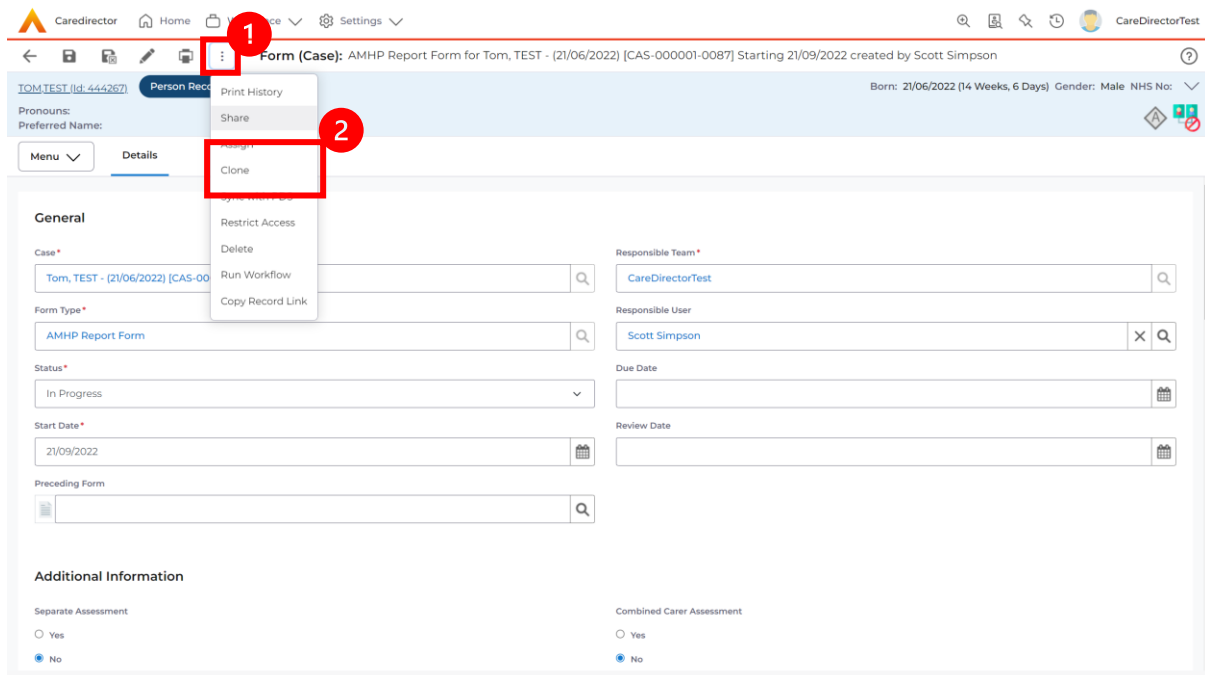
The screenshot shows the CareDirector interface for a case record. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' dropdown is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted with a red box and a red circle with the number 3. The main content area shows a timeline of events, including 'Form (Case) Created' on 21/09/2022 13:04:25.

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

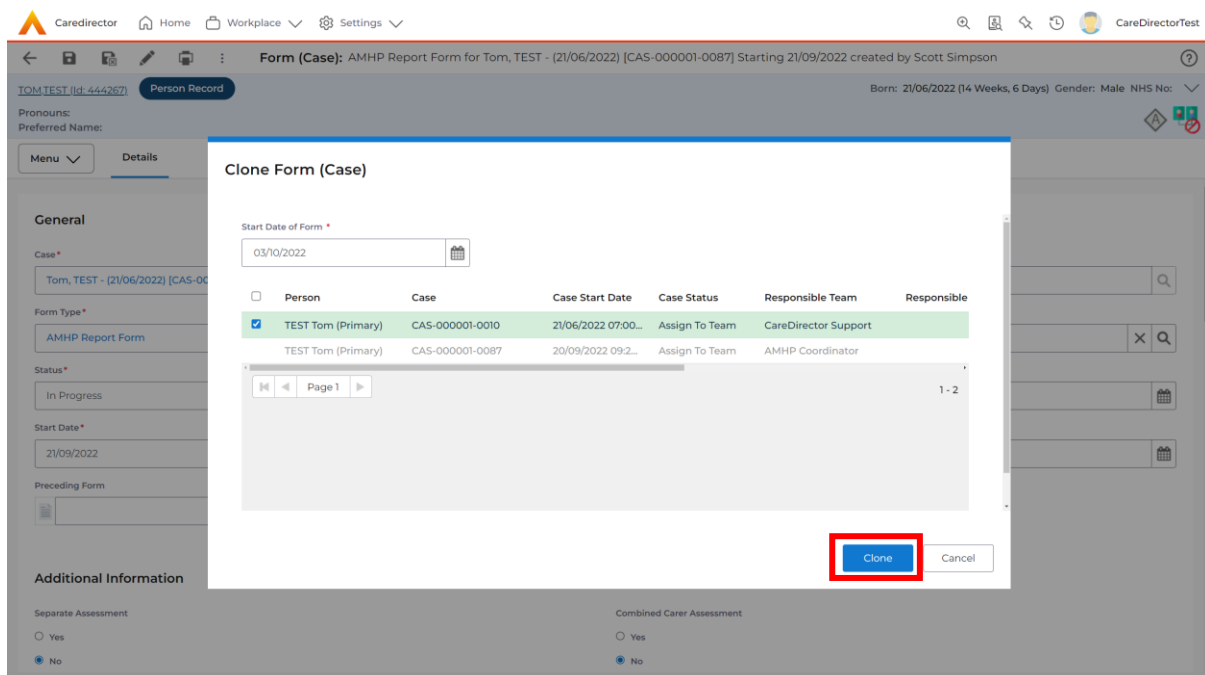
The screenshot shows the 'Forms (Case)' table in the CareDirector interface. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. One record is visible:

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 CareDirector interface with the following details:

- Navigation:** Caredirector | Home | Workplace | Settings
- Page Title:** Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...
- User Profile:** TOM TEST (id: 444267) | Person Record | Born: 21/06/2022 (20 Weeks, 3 Days) | Gender: Male | NHS No: [redacted]
- Form Details:**
  - Case:** Tom, TEST - (21/06/2022) [CAS-000001-0087]
  - Form Type:** Adult Care and Support Plan
  - Status:** Closed
  - Start Date:** 09/11/2022
  - Responsible Team:** CareDirectorTest
  - Responsible User:** Scott Simpson
  - Due Date:** 11/11/2022
  - Review Date:** [empty]
  - Preceding Form:** [empty]
- Completion Details:**
  - 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 search bar containing the text 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. Below the search bar, there is a header for the user 'TOM,TEST (Id: 444267)' with a 'Person Record' button. The main content area is titled 'General' and contains several fields: '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), and 'Review Date'.

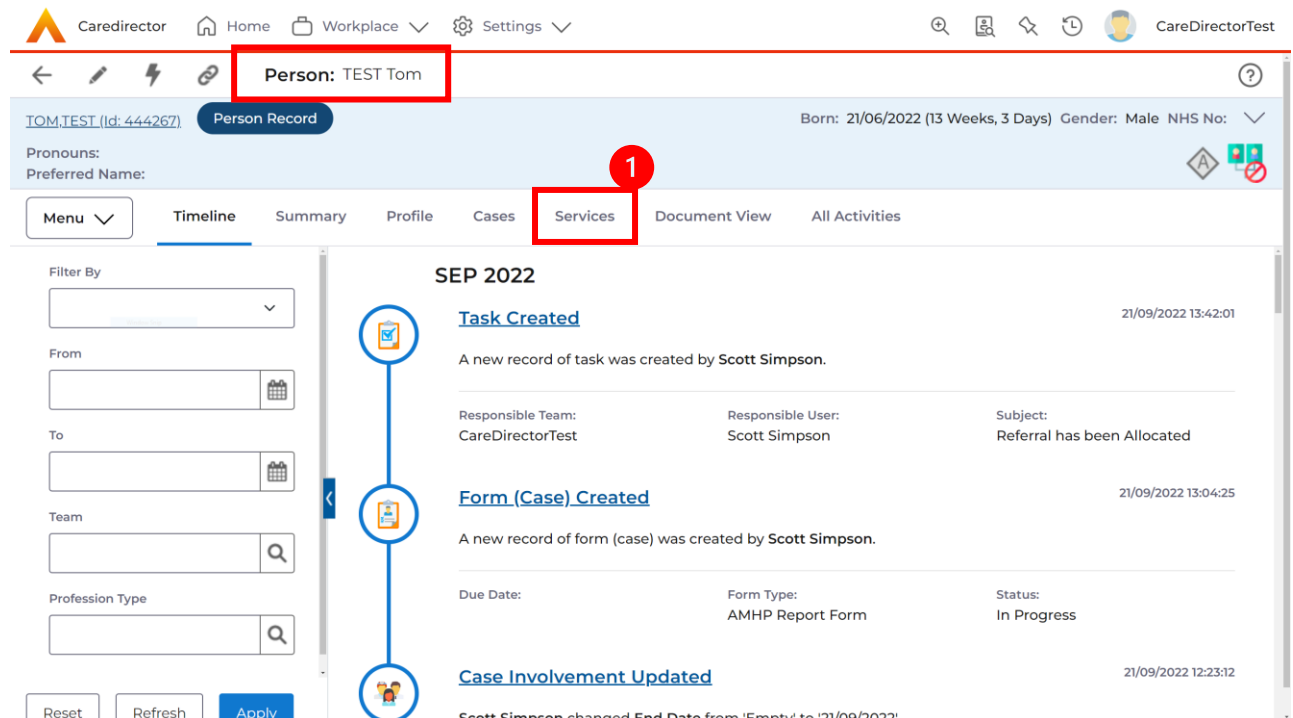
2. Select the **Three Dots** and select **Activate**.

The screenshot shows the same CareDirector interface as above, but with a context menu open over the 'Three Dots' icon. 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 red circle with the number '2'. The 'Three Dots' icon is also circled in red with a red circle with the number '1'.

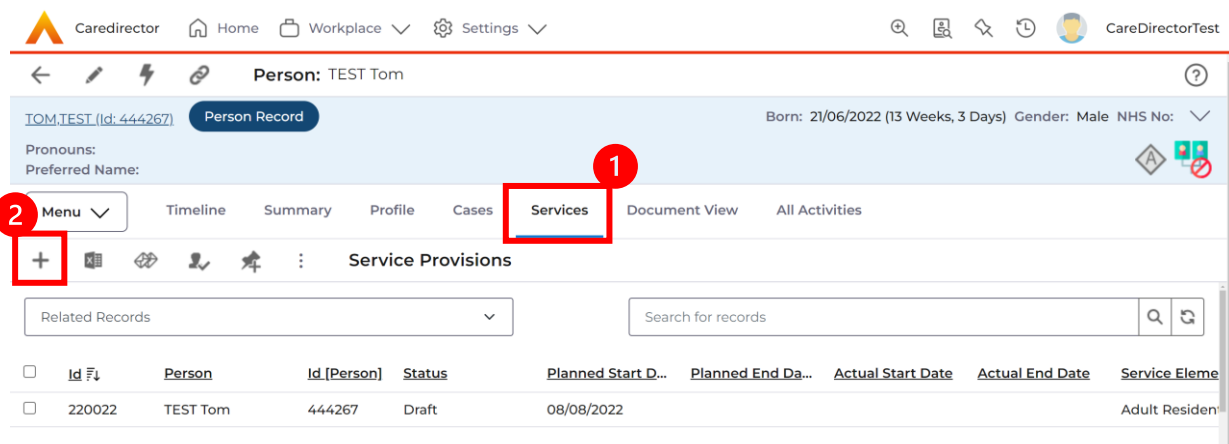
# How to input Service Provisions

## Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.
2. Select the relevant **Person Record** and select **Services**.



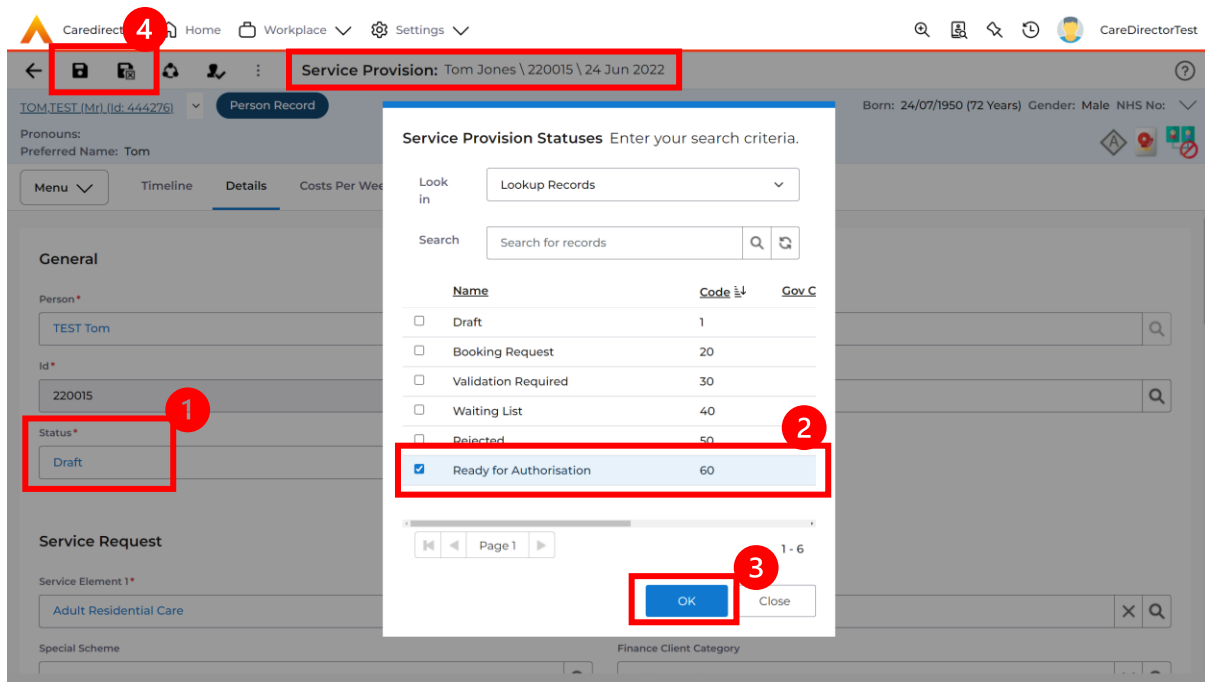
3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



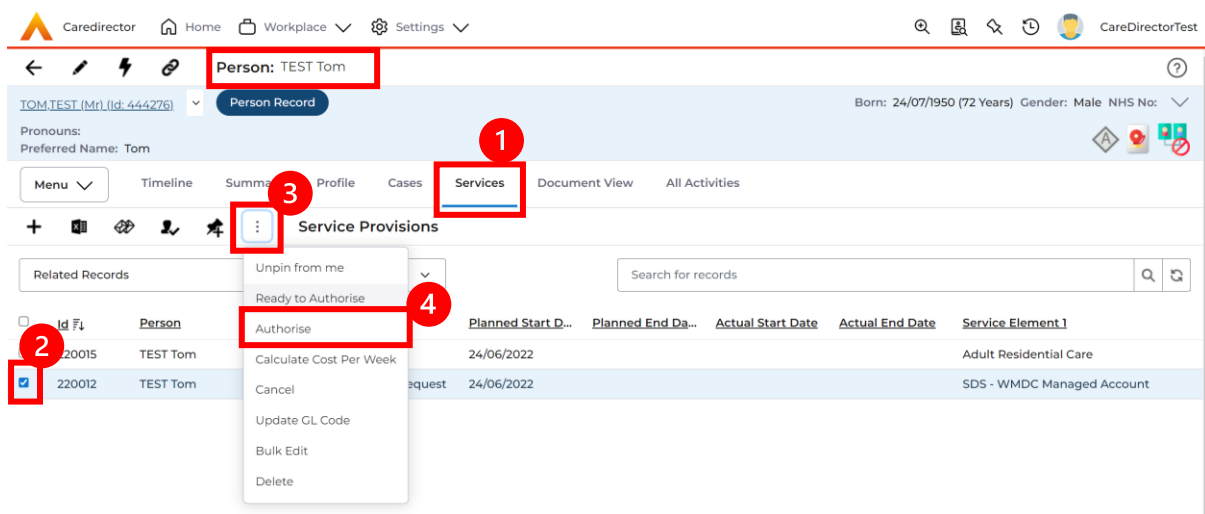
4. Then follow the appropriate section to complete the **Service Provision**.

## How to Authorise a Service Provision

1. Locate the **Service Provision** and make sure the **Status** is **Ready for Authorisation**. If it is not, then go into the record and change the **Status** to **Ready for Authorisation** then select **Save**.



2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise**.





## How to input Service Deliveries

1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022'. The main header area displays the user's name 'MULLENTEST, Tom (Id: 444264)', a 'Person Record' button, and personal details: 'Born: 03/05/1955 (67 Years) Gender: Male NHS No:'. Below the header is a tabbed interface with 'Service Deliveries' selected. A toolbar below the tabs contains a '+' icon (highlighted with a red circle and '2') and other icons. A table below the toolbar is empty, with a 'NO RECORDS' message in the center.

2. Now select the information required. **Units** is based around **1** being a **1 of the Rate Unit**. For example, if your **Rate Unit** shows **Per 1 Hour Unit** then you put **Units** as **1** this will record that each visit will be **1 hour long**. If it says **0.5** it will be **half an hour each visit**.
3. **Planned Start Time** is the time that the visit takes place on the chosen dates. If more than one visit is required and at different times, then when **Saved** create a new **Service Delivery**.
4. Once **Saved**, this will automatically generate **Total Visits/ Total Units**.

Caredirector Home Workplace Settings CD V6 Team

Service Delivery: TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2...

TOM.TEST (Id: 444267) Person Record Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:   
 Pronouns: Preferred Name:

Menu Details Variations

### General

Service Provision *	TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088...	Responsible Team *	CareDirectorTest
Id *	188114	Rate Unit *	Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time *	09:00	Units *	1.0000
Total Visits *	7	Total Units *	7.0000
Number of Carers *	1		

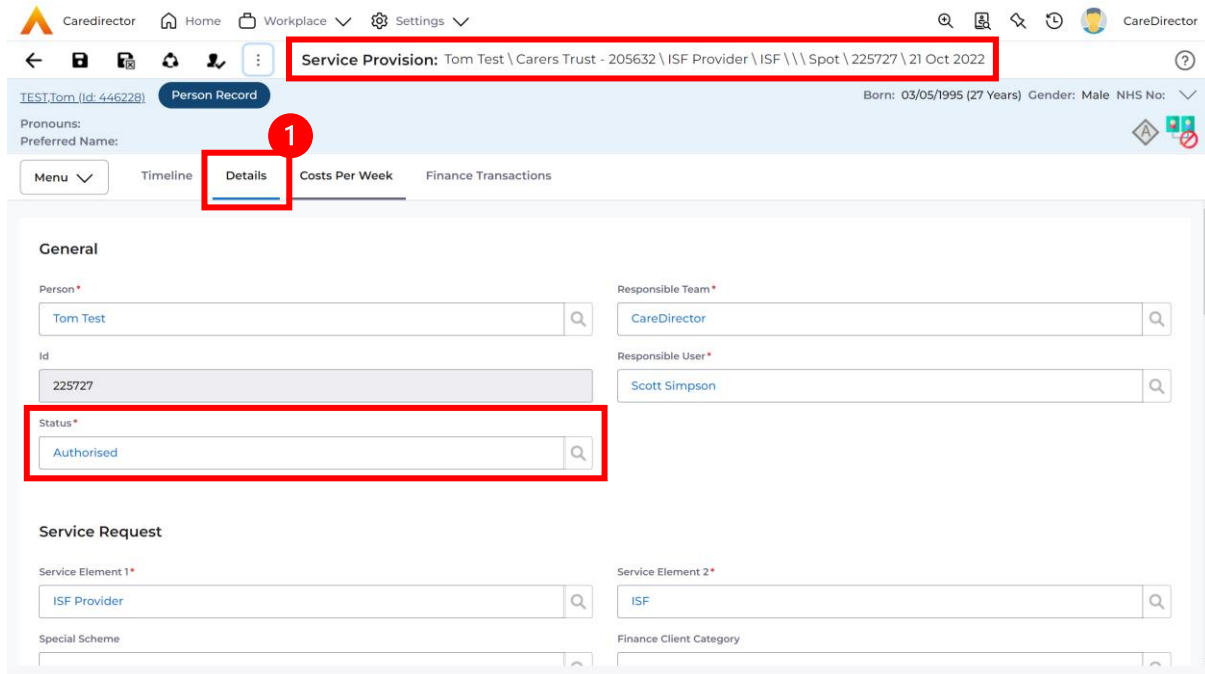
### Schedule applies to days

Select All *	Thursday *
<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No
Monday *	Friday *
<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No
Tuesday *	Saturday *
<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No
Wednesday *	Sunday *
<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No

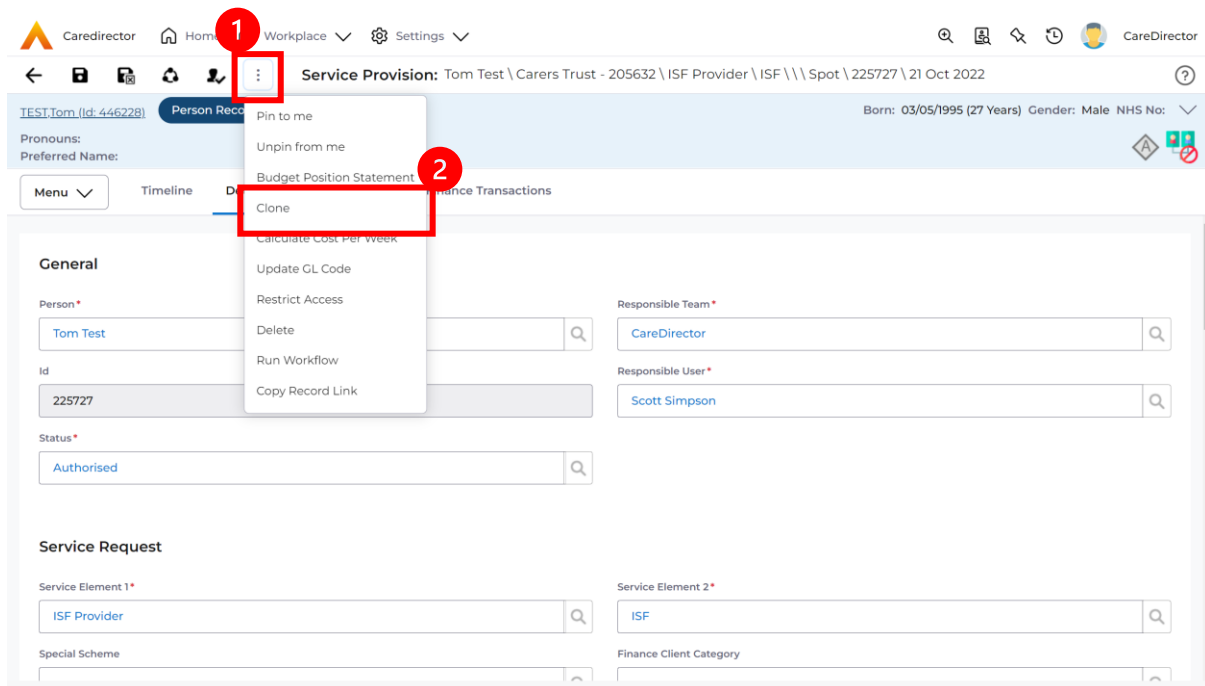
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

## How to Clone a Service Provision

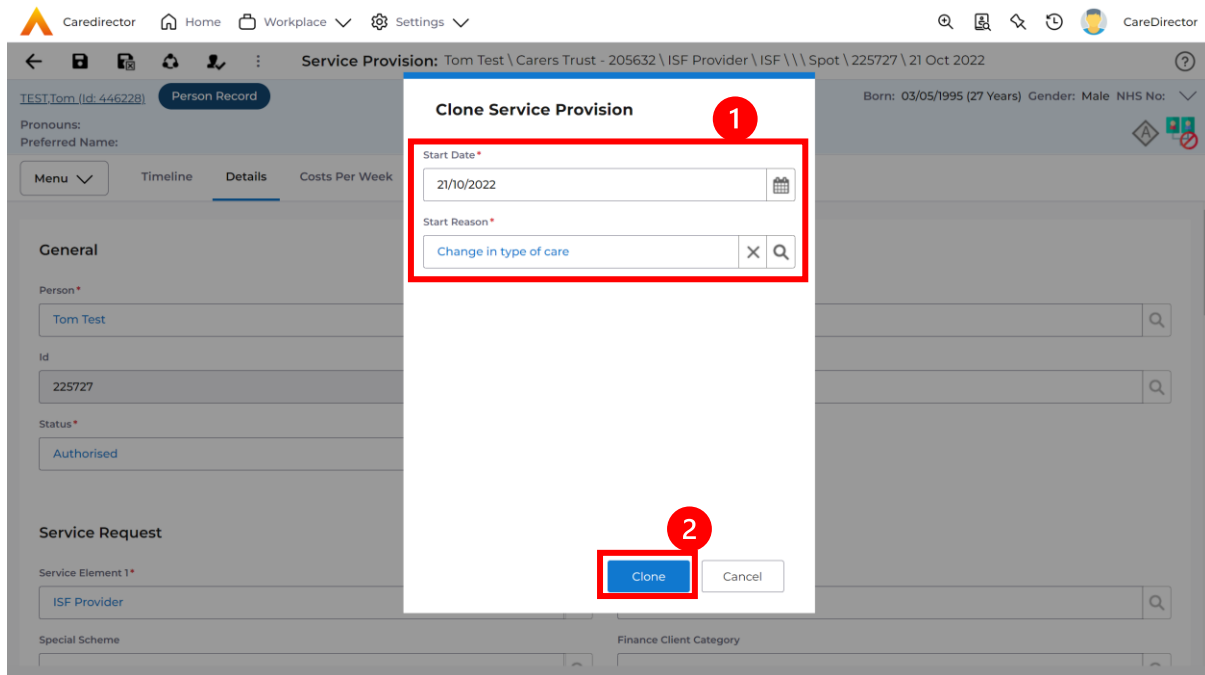
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



2. Select the **Three Dots** from the toolbar and select **Clone**.



3. Select the new **Start Date** and **Start Reason** and select **OK**.



## How to End Service Provisions

1. Locate the **Service Provision** that requires an end date. Select the **Details** tab, scroll down to the **Dates** heading and enter an **Actual End Date** and **End Reason**. When finished, select **Save**.

The screenshot shows the CareDirector interface for a service provision. The breadcrumb trail is: Service Provision: TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju... The 'Details' tab is selected. The 'Dates' section contains the following fields:

Field	Value
Planned Start Date	24/06/2022
Planned End Date	
Actual Start Date	
Actual End Date	21/10/2022
Start Reason*	New Placement
End Reason*	Carer's Decision

The 'Commissioning' section contains the following fields:

Field	Value
Purchasing Team	Adults Connecting Care Team East
Frequency in Weeks*	1

## How to close a Case

### Ending Secondary Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.
2. Only the secondary and external **Involvements** need to have an end date. The **Responsible User/ Team** will automatically end once the **Case** has been **closed**.
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements**.

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows the case title 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' and the user 'CareDirectorTest'. Below the header, the 'Person Record' section for 'TOM,TEST (Id: 444267)' is visible, including birth date, gender, and NHS number. A left-hand menu is open, with 'Menu' selected. The 'Related Items' section is highlighted, and the 'Involvements' option is selected. Red boxes and numbers 1, 2, and 3 indicate the steps: 1. Clicking the 'Menu' button, 2. Clicking 'Related Items', and 3. Clicking 'Involvements'.

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

Caredirector Home Workplace Settings

CareDirectorTest

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

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Pronouns: Preferred Name:

Menu Timeline Details

Case Involvements

Related Records  Search for records

<input type="checkbox"/>	<u>Involvement Member</u>	<u>Role</u>	<u>Involvement Re...</u>	<u>Case</u>	<u>Responsible Team</u>	<u>Start Date</u>	<u>End Date</u>	<u>Create</u>
<input type="checkbox"/>	Community Occupatio...	Occupational Th...		Tom, TEST - (21/06/2022) [CAS-000001-0087]	CareDirectorTest	21/09/2022		Scott

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

The screenshot shows the CareDirector interface for editing a Case Involvement. The breadcrumb trail is: Home > Workplace > Settings > Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o... The 'End Date' field is set to 21/09/2022. The 'Save and Return to Previous Page' button is highlighted with a red box and a red circle containing the number '2'. The 'End Date' field is highlighted with a red box and a red circle containing the number '1'.

General	
Case *	Responsible Team *
Tom, TEST - (21/06/2022) [CAS-000001-0087]	CareDirectorTest
Person *	Involvement Priority
TEST Tom	
Involvement Member *	Involvement Status
Community Occupational Therapy Service	
Role *	End Date
Occupational Therapist	21/09/2022
Start Date *	Involvement End Reason
21/09/2022	
Involvement Reason	Involvement Review Date
Description	

6. If the Case cannot be closed, there will be ongoing work associated with the Case.



## Close an Open Activity

1. Select **Menu** within the **Case Record**. Then select **Activities** and open the relevant location of an activity.



The screenshot shows the CareDirector interface for a case record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the patient information is displayed: 'TOM,TEST (Id: 444267) Person Record', 'Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:'. The 'Menu' button is highlighted with a red box and the number 1. The 'Activities' option in the left sidebar is highlighted with a red box and the number 2. The 'Appointments' card in the main content area is highlighted with a red box and the number 3. Below the menu, there are search bars and form fields for 'Responsible User', 'Responsible Team\*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By\*', and 'Archive Date\*'.

2. Open the relevant location of an activity has been opened. Select the **Activity** that needs to be closed from the options.




Caredirector Home Workplace Settings CareDirectorTest



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

TOM,TEST (Id: 444267) Person Record Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: ▾

Pronouns: Preferred Name:  

Menu ▾ Timeline Details

+    Tasks

Related Records ▾ Search for records  

<input type="checkbox"/>	<u>Subject</u>	<u>Due</u> ⌵	<u>Status</u>	<u>Regarding</u>	<u>Reason</u>	<u>Responsible Team</u>	<u>Responsible User</u>
<input type="checkbox"/>	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom, TEST - (21/06/2022)...		CareDirectorTest	Scott Simpson

3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page**.

The screenshot displays the CareDirector interface for a task record. The navigation bar at the top includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The toolbar contains icons for back, save, refresh, and a three-dot menu. The three-dot menu is open, showing options like 'Clone', 'Complete', 'Cancel', 'Restrict Access', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Complete' option is highlighted. The record details show 'TOM,TEST (Id: 44426)', 'Person Recd', 'Born: 21/06/2022 (13 Weeks, 1 Day)', 'Gender: Male', and 'NHS No:'. The 'Subject' field contains 'Referral has been Allocated'. Below the subject is a rich text editor with a toolbar and a description field. The bottom right corner shows 'Characters (with HTML): 0/100000'.

## Closing a Case

1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. A search bar contains the text 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below the navigation bar, the user profile 'CareDirectorTest' is visible. The main content area shows the 'Person Record' for 'TOM,TEST (Id: 444267)'. The 'Details' tab is selected, indicated by a red circle with the number '1'. The 'Assignment Information' section is visible, with a red circle and the number '2' highlighting the 'Case Status\*' dropdown menu, which currently displays 'Assign To Team'. Other fields in the 'Assignment Information' section include 'Case Priority', 'Responsible User', 'Responsible Team\*' (displaying 'AMHP Coordinator'), and 'Review Date'.

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

Caredirector Home Workplace Settings

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

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Menu Timeline **Details**

### Assignment Information

Case Status \*  **2**

Case Priority

Responsible User

Responsible Team \*

Review Date

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

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main content area displays a 'Person Record' for 'Tom, TEST' with details like 'Case Status\*', 'Case Priority', 'Responsible User', and 'Responsible Team\*'. A modal window titled 'Case Statuses' is open, allowing the user to search for records and select a status. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search bar contains 'Search for records'. The list of statuses includes: 'Awaiting allocation (unscheduled revi...', 'Closed', 'Closed & Logged As Enquiry' (selected), 'Closed as a Contact', 'Closed Under Review', 'Closure Request Rejected', and 'Closure Requested'. The 'OK' button is highlighted with a red box.

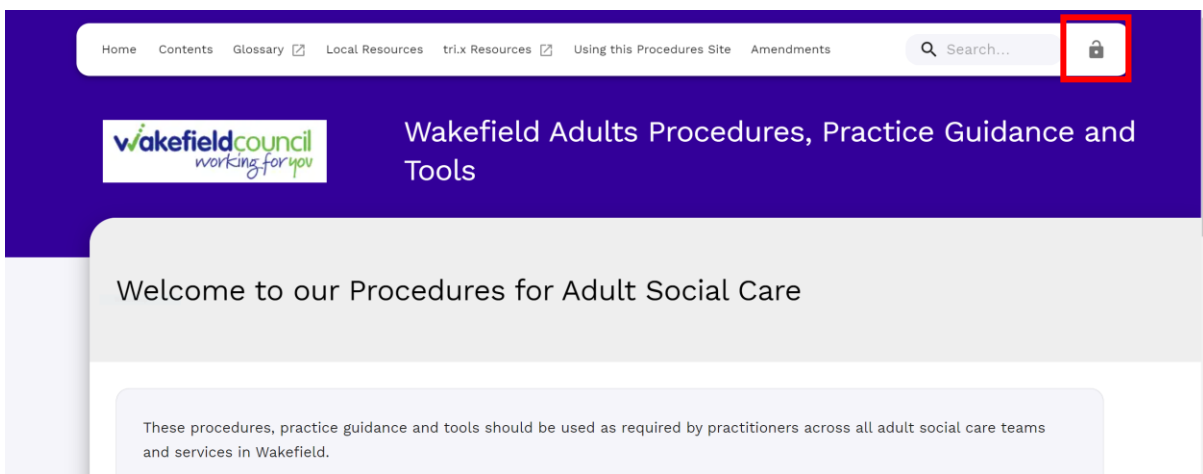
- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot shows the 'Assignment Information' section of the CareDirector interface. The 'Case Status' is set to 'Closed'. The 'Close Date' is 03/10/2022 at 13:43. The 'Closure Reason' is 'All Work Completed'. The 'Closure Accepted By' is 'Scott Simpson'. The 'Archive Date' is 28/10/2022. A red box highlights the 'Close Date', 'Closure Reason', 'Closure Accepted By', and 'Archive Date' fields.

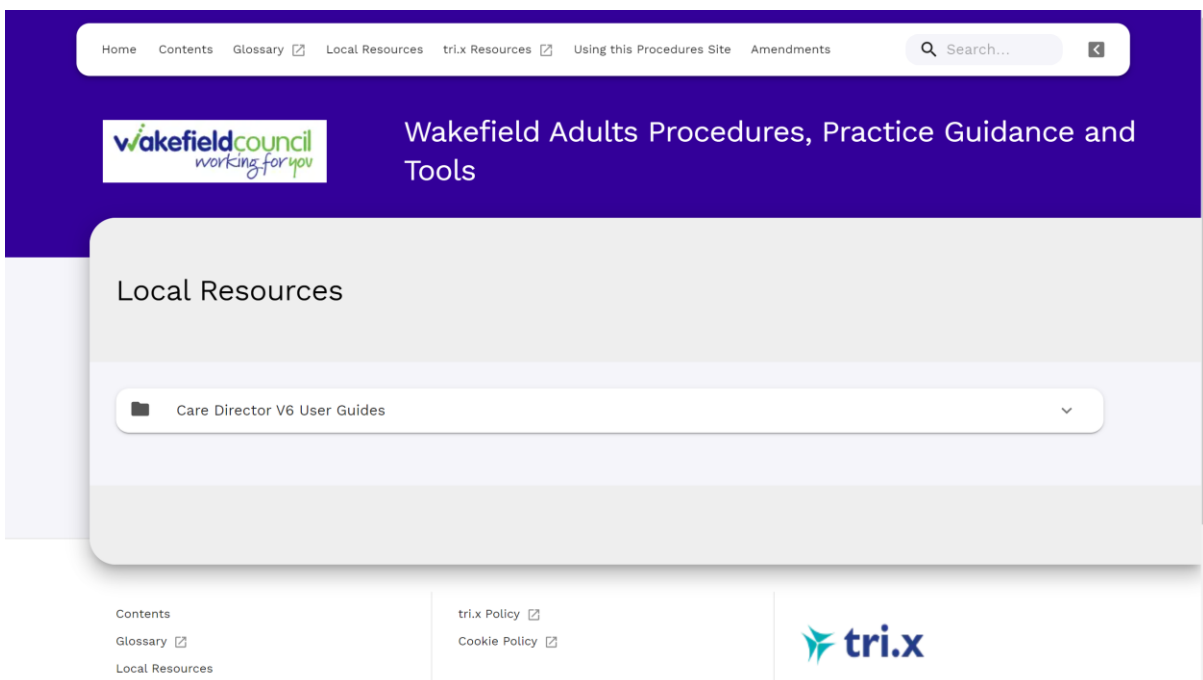
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

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