



Accommodation Team V1.0

Document CareDirector Accommodation Team Bespoke Guide.
Purpose Accommodation Teams daily tasks on CareDirector.
Version V1.0
Owner ICT Business Transformation Team
Last Updated 11/11/2022

Contents

Guide Information.....	3
Before Live Access... ..	3
Guide Navigation	3
How to search for a Service User.....	5
How to search for a Case.....	6
How to check the Case Status.....	7
How to find Activities	8
How to input an Activity	10
How to upload Attachments	12
How to use Advanced Search	14
How to find a Form (Case)	15
Where to find Service Provisions	16
How to search for a Provider.....	17
Further CareDirector Guidance	18

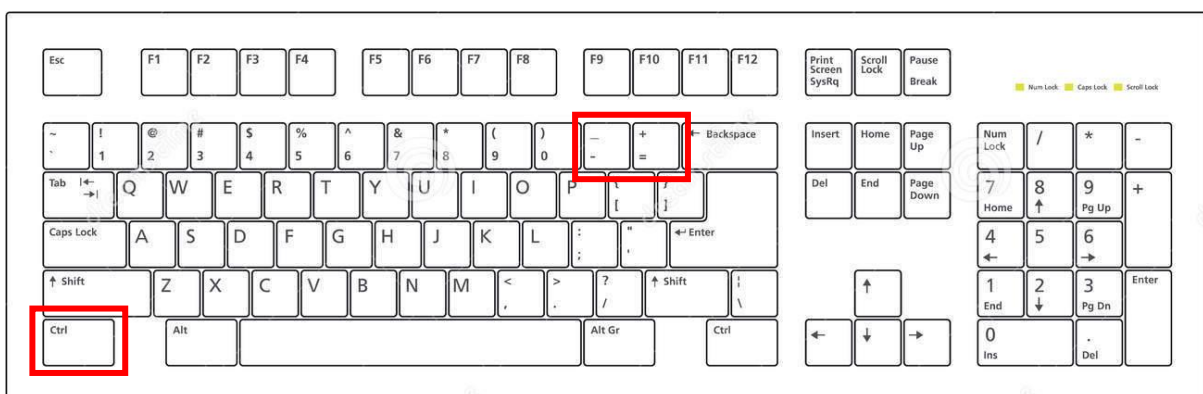
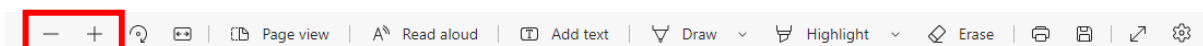
Guide Information

Before Live Access...

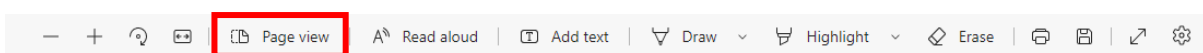
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

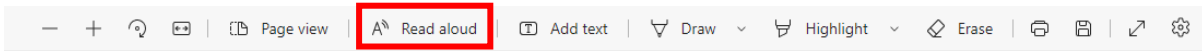
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



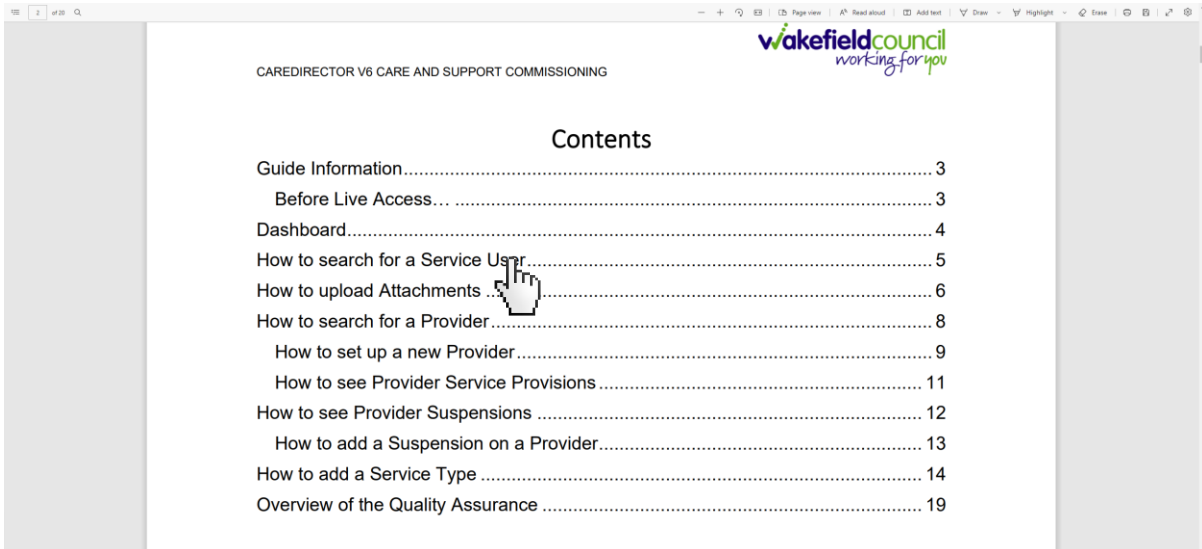
3. To put pages next to one another, select the **Page View** icon on the toolbar.



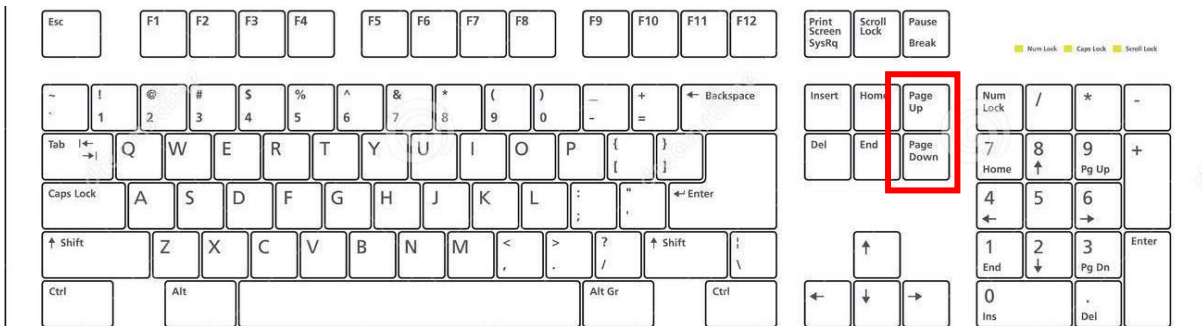
4. For auditory assistance, select **Read Aloud** from the toolbar.



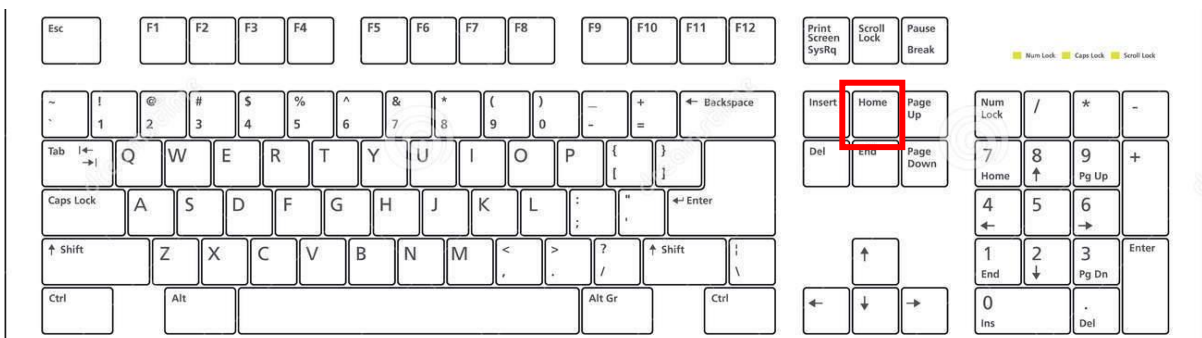
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

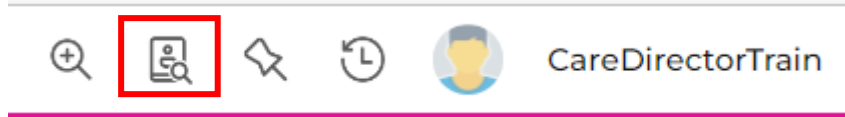


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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**.

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 of the table 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 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

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

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 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

- 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 circle and the number '1'. The 'Menu' is open, showing 'Activities' highlighted with a red circle and the number '2'. Other menu items include 'Timeline', 'Details', 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. 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 circle and the number '1'. The 'Menu' is open, showing 'Activities' highlighted. Below the menu, there's a toolbar with a plus sign icon, a trash icon, and a 'Tasks' button. The plus sign icon is highlighted with a red circle and the number '1'. Below the toolbar, there's a search bar for records and a table of related records.

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

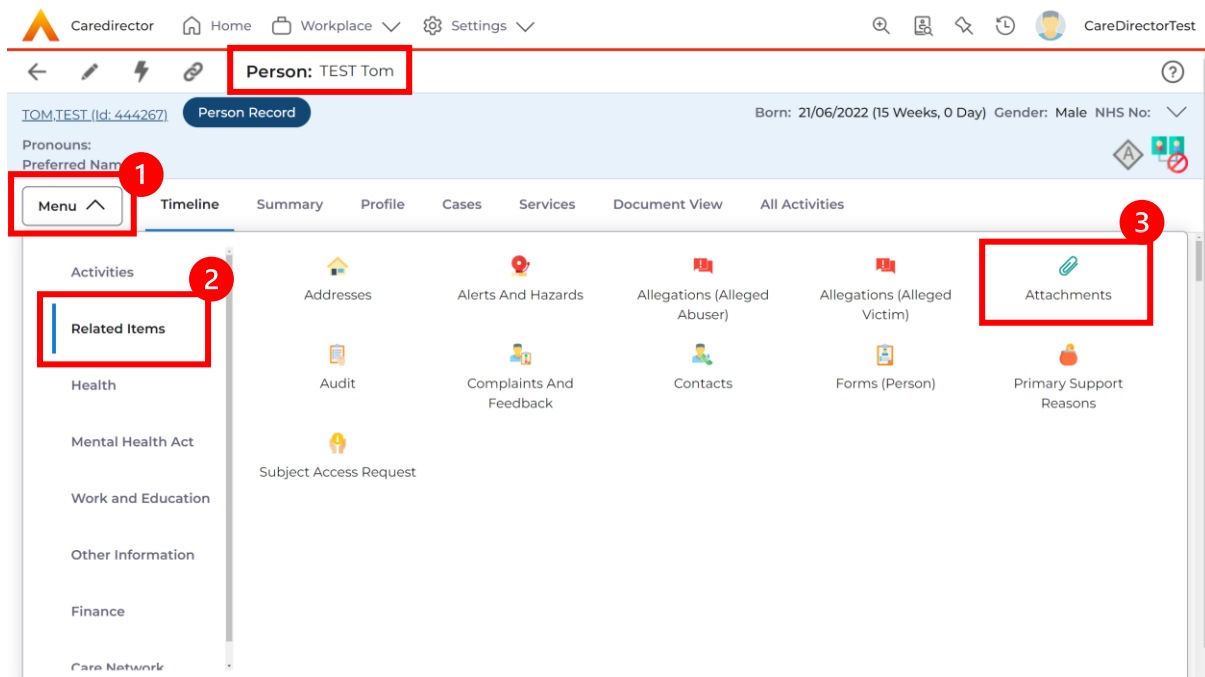
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the 'Case Note (For Case): New' form in the CareDirector system. The form includes several fields: Case, Reason, Priority, Date, Status, Responsible Team, Responsible User, Category, Sub-Category, and Outcome. The 'Responsible User' field is populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' button in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'. The 'Case' field contains 'Tom, TEST - (21/06/2022) [CAS-000001-0087]' and the 'Responsible Team' field contains 'CareDirectorTest'.

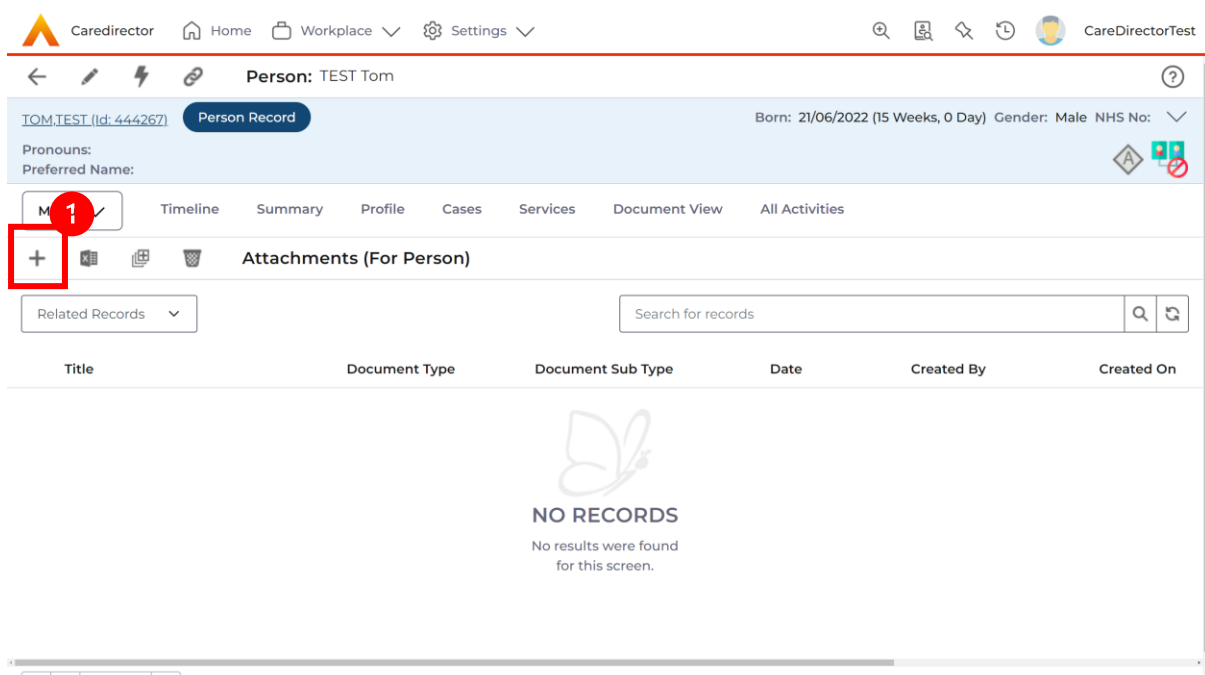
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

How to upload Attachments

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



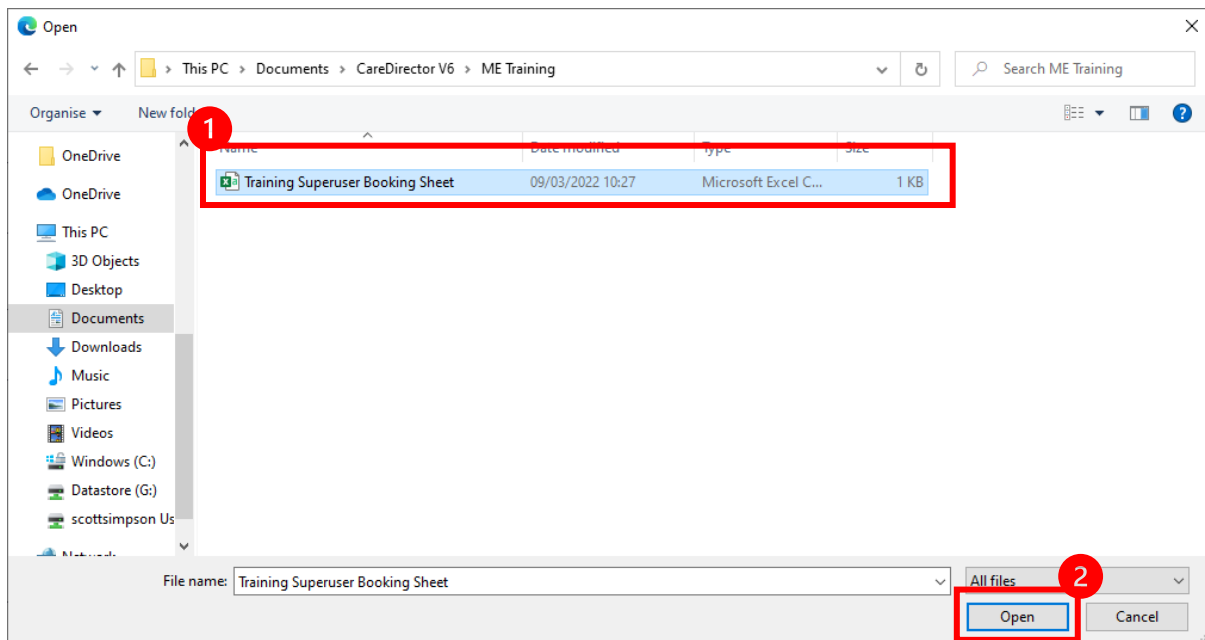
2. When opened, select the **Create New Record** from the toolbar.



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

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

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



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

How to use Advanced Search

1. Most **Advanced Searches** are available through your **Dashboards**. However, situationally there may be a reason to use the **Advanced Search** button on the **Navigation Menu**. You are not able to build your own, you can only choose from pre-built **Saved** ones.
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.

The screenshot shows the CareDirector navigation menu. The 'Advanced Search' icon is highlighted with a red box and a '2' callout. The search icon in the top right corner is highlighted with a red box and a '1' callout.

3. Select from the list to automatically search for the pre-built **advanced search**. If nothing is shared with you independently, tell your superuser.

The screenshot shows the 'Advanced Searches Shared with me' list. The list is highlighted with a red box and a '1' callout.

Business Object Name	Advanced Search Name
<input type="checkbox"/> Document	Active Documents
<input type="checkbox"/> ServiceProvision	Booking requests for carers trust
<input type="checkbox"/> ServiceProvision	Booking requests for Coordination te...
<input type="checkbox"/> ServiceProvision	Booking requests- support & enable...
<input type="checkbox"/> ServiceProvision	Cancelled booking requests for Coord...

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 is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is viewing the 'Person Record' for 'TOM TEST (Id: 444267)'. The navigation menu is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. 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. 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.
- Case Involvement Created** (21/09/2022 12:17:20): A new record of case involvement was created by Scott Simpson.

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

The screenshot shows the 'Forms (Case)' view for the same case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user is viewing the 'Person Record' for 'TOM TEST (Id: 444267)'. The 'Forms (Case)' view is active, showing a table of related records:

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			

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**.

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail shows 'Person: TEST Tom'. Below this, the person's details are visible: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A red box highlights the 'Person: TEST Tom' breadcrumb. Below the details, a menu bar contains 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. A red box highlights the 'Services' tab, with a red circle containing the number '1' next to it. The main content area shows a timeline for 'SEP 2022' with three entries: 'Task Created' (21/09/2022 13:42:01), 'Form (Case) Created' (21/09/2022 13:04:25), and 'Case Involvement Updated' (21/09/2022 12:23:12). A filter sidebar is visible on the left with fields for 'Filter By', 'From', 'To', 'Team', and 'Profession Type'.

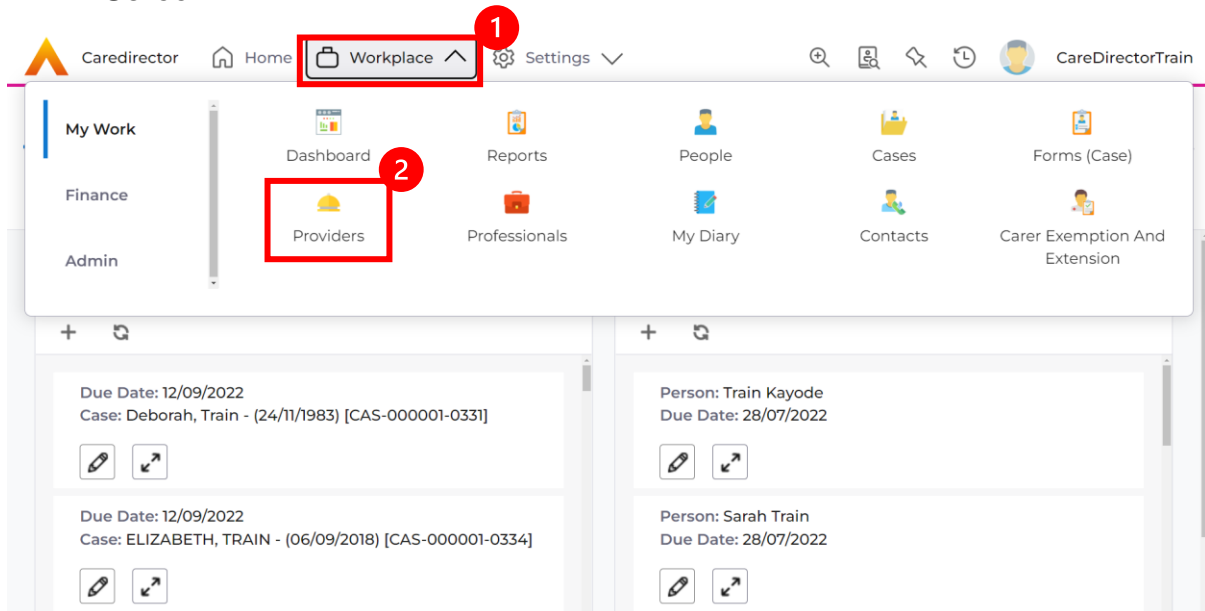
3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.

The screenshot shows the CareDirector interface with the 'Services' tab selected. A red box highlights the 'Menu' button in the top navigation bar, with a red circle containing the number '2' next to it. Below the menu bar, a toolbar for 'Service Provisions' is visible, containing a red box around a '+' icon (Create New Record) and other icons. Below the toolbar, there is a search bar for records and a table of related records. The table has columns: 'Id', 'Person', 'Id [Person]', 'Status', 'Planned Start D...', 'Planned End Da...', 'Actual Start Date', 'Actual End Date', and 'Service Eleme'. One record is shown with Id '220022', Person 'TEST Tom', Id [Person] '444267', Status 'Draft', and Planned Start Date '08/08/2022'.

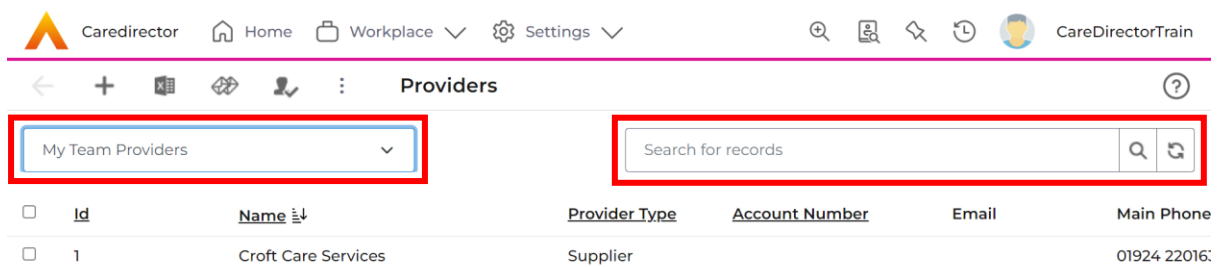
4. Then follow the appropriate section to complete the **Service Provision**.

How to search for a Provider

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

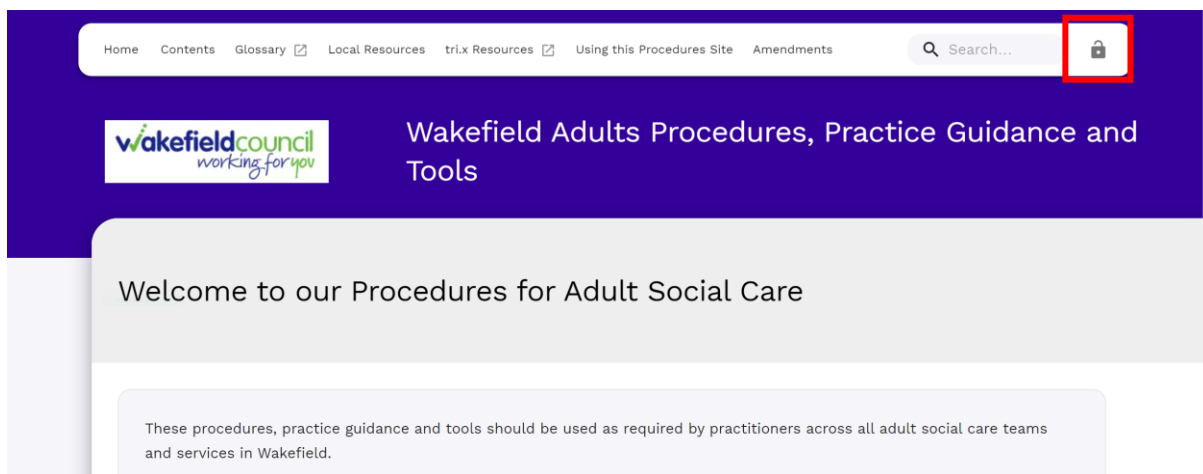


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

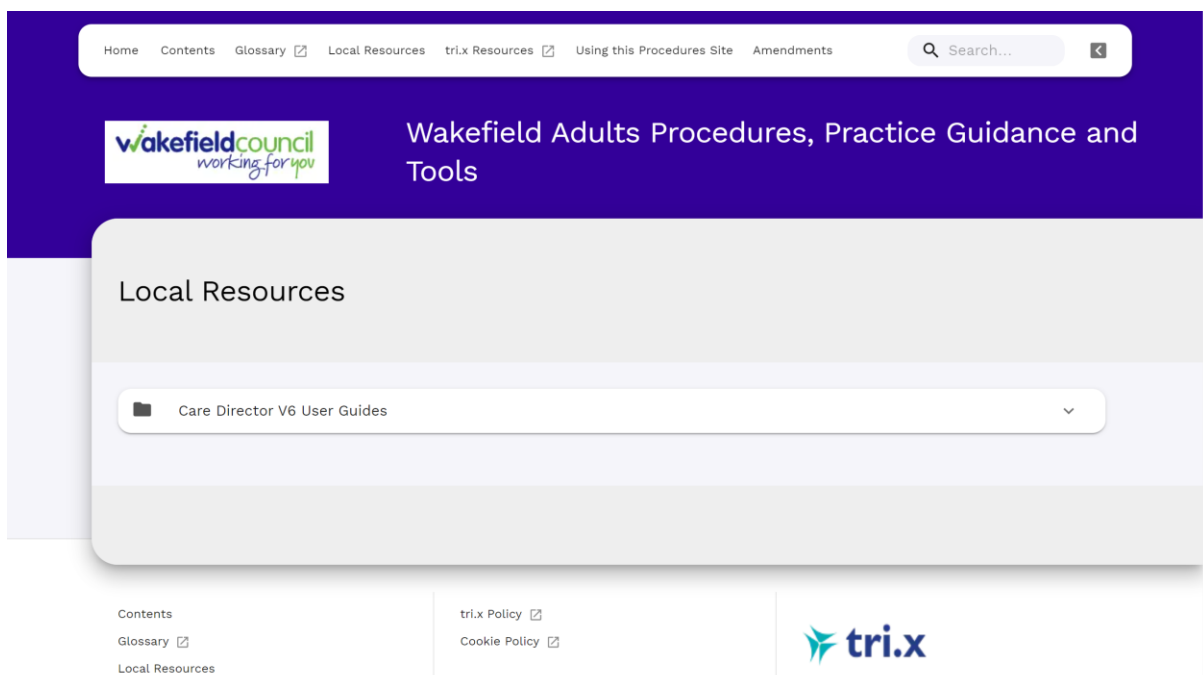


Further CareDirector Guidance

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	14/10/2022