Personalisation & Assessment Team V1.0

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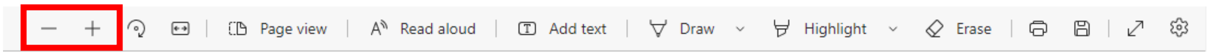
Guide Information

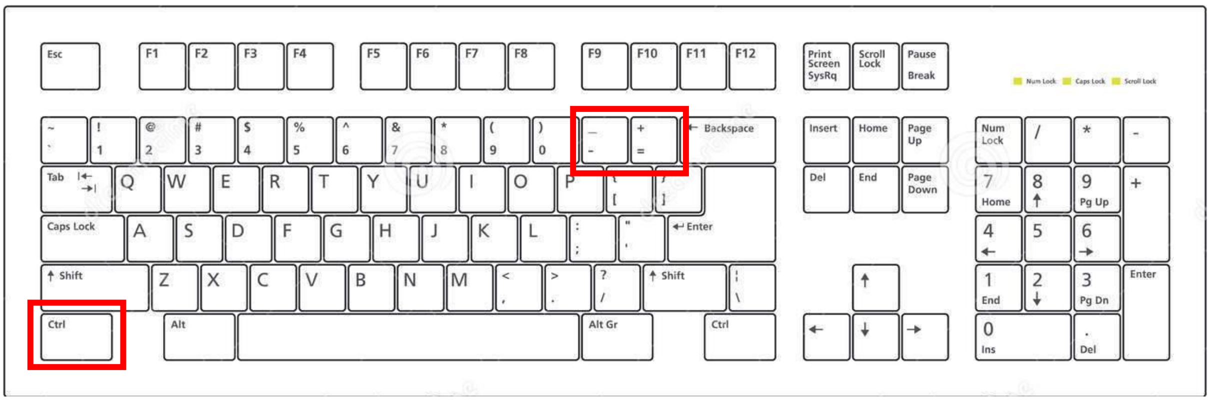
Before Live Access…

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.

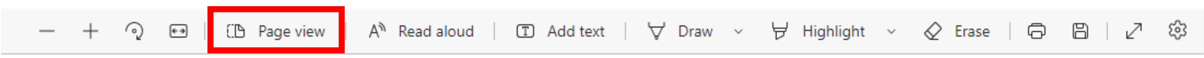
Guide Navigation

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.

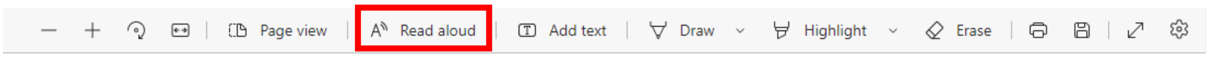




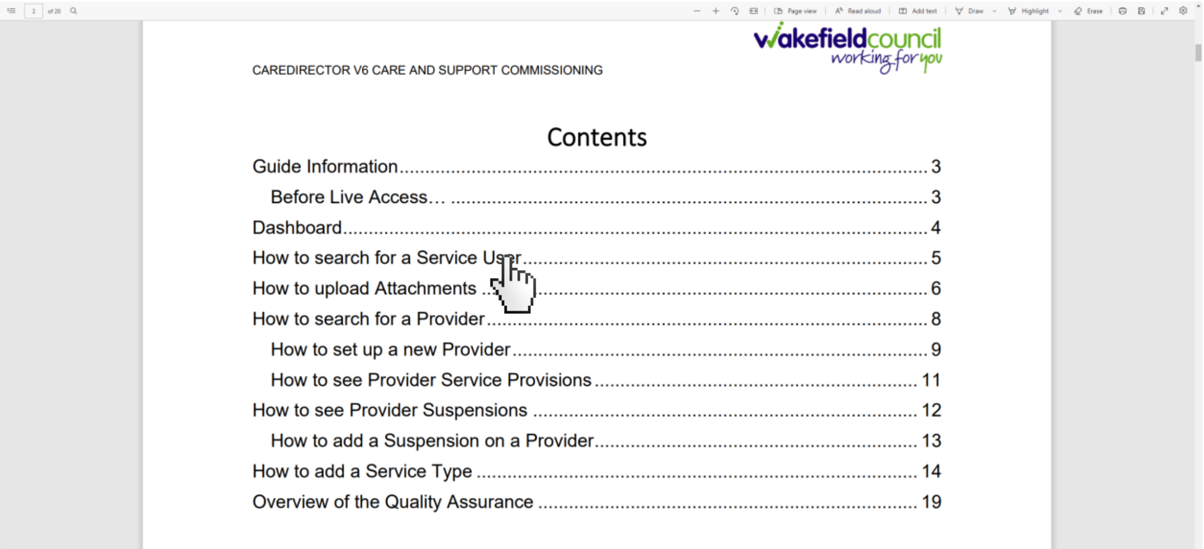
3. To put pages next to one another, select the **Page View** icon on the toolbar.



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.



CAREDIRECTOR V6 CARE AND SUPPORT COMMISSIONING

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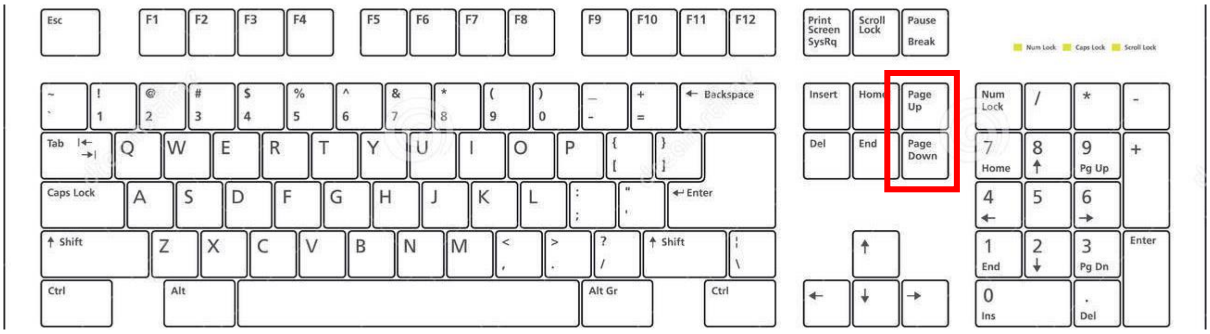
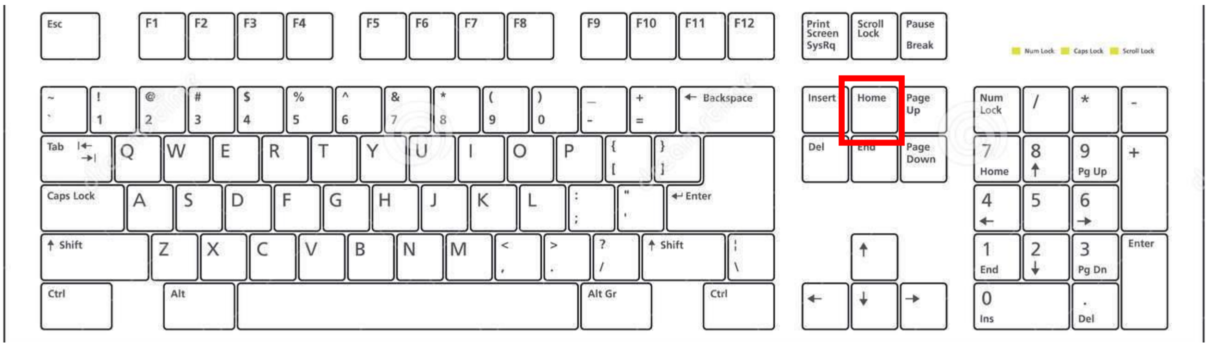
6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to “jump” up and down a page.

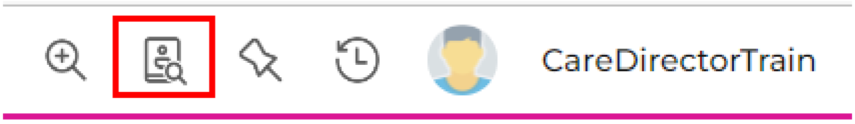


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.

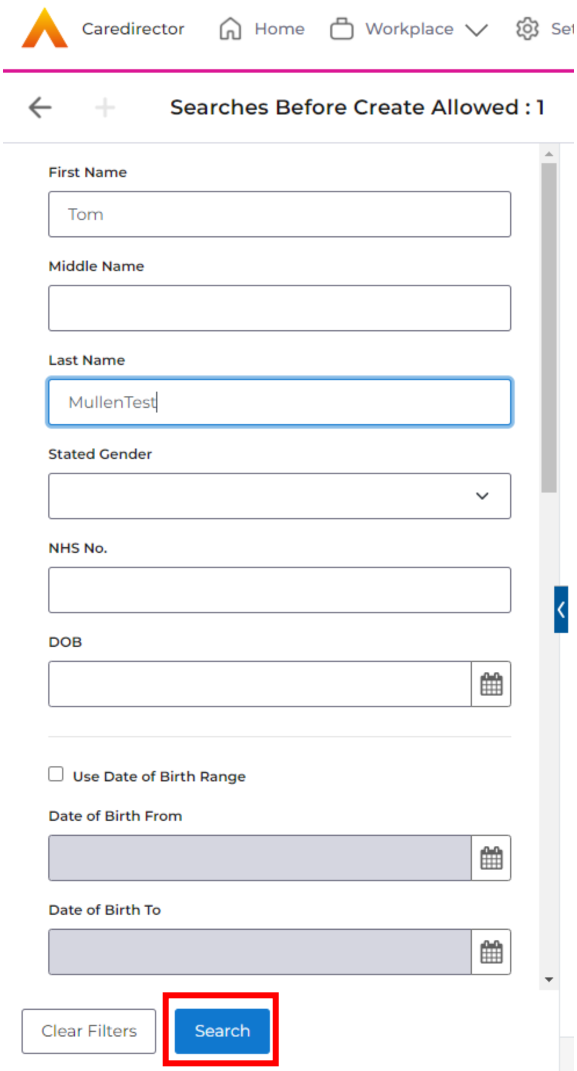


How to search for a Service User

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



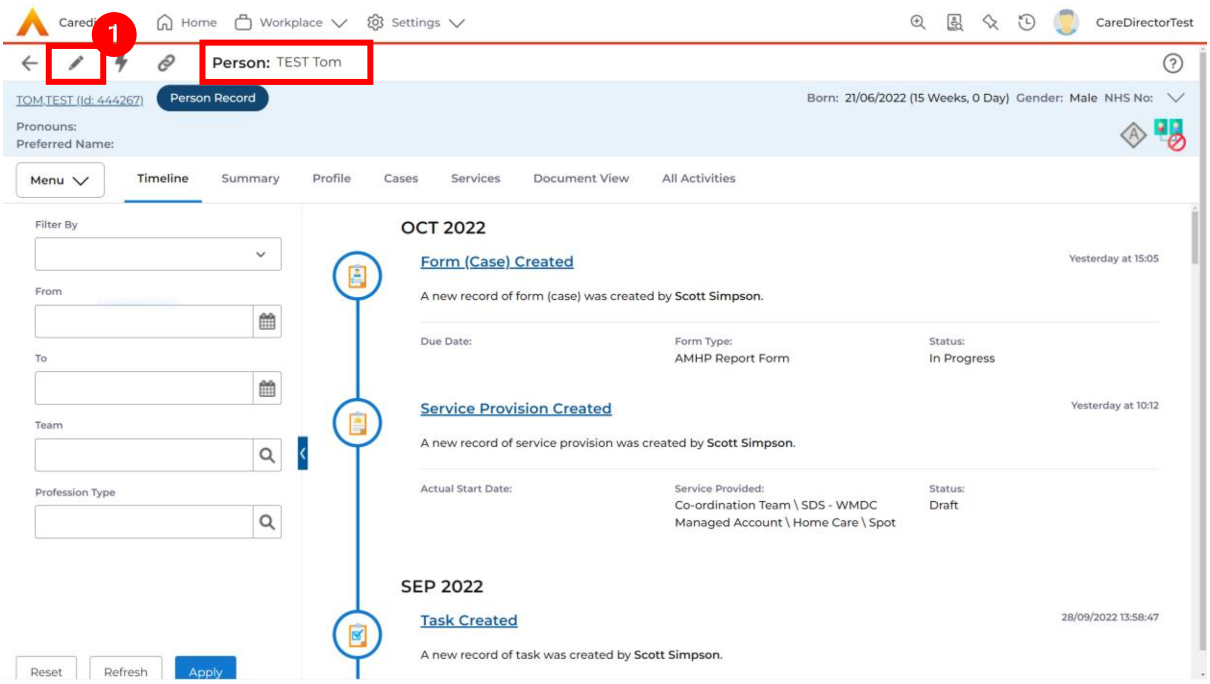
2. Enter their details provided. When finished, select **Search**.



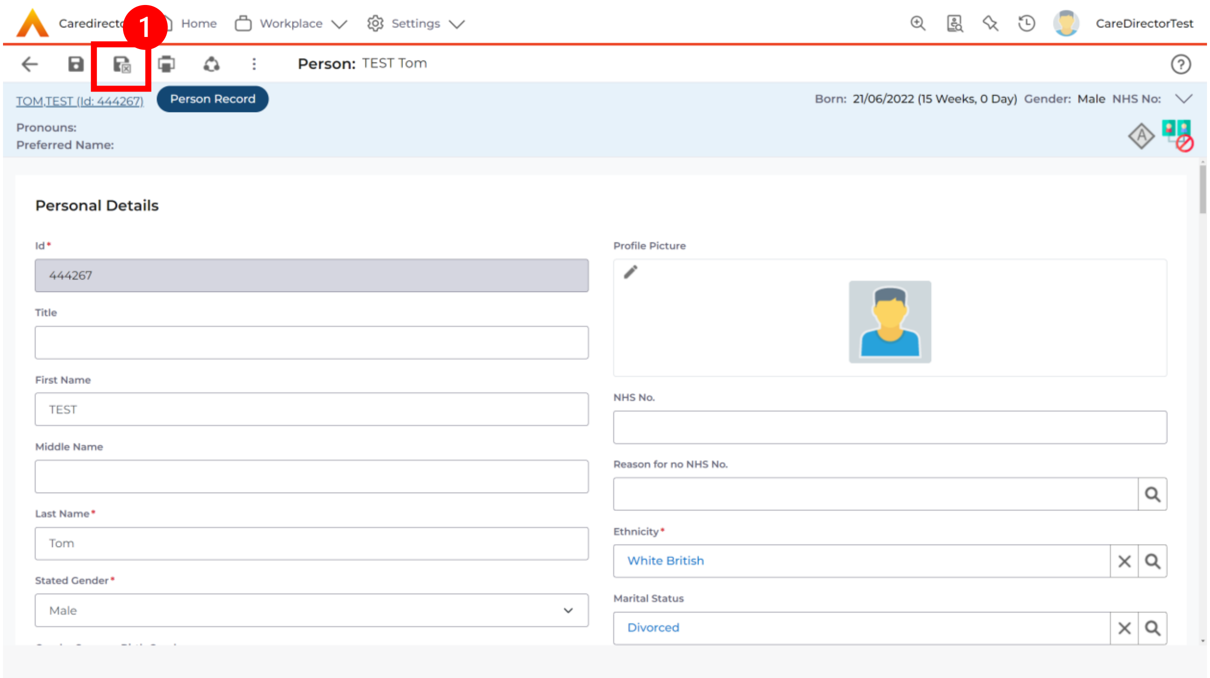
3. Select from the list on the right-hand side. This will open their **Person Record.**

Updating Person Details

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

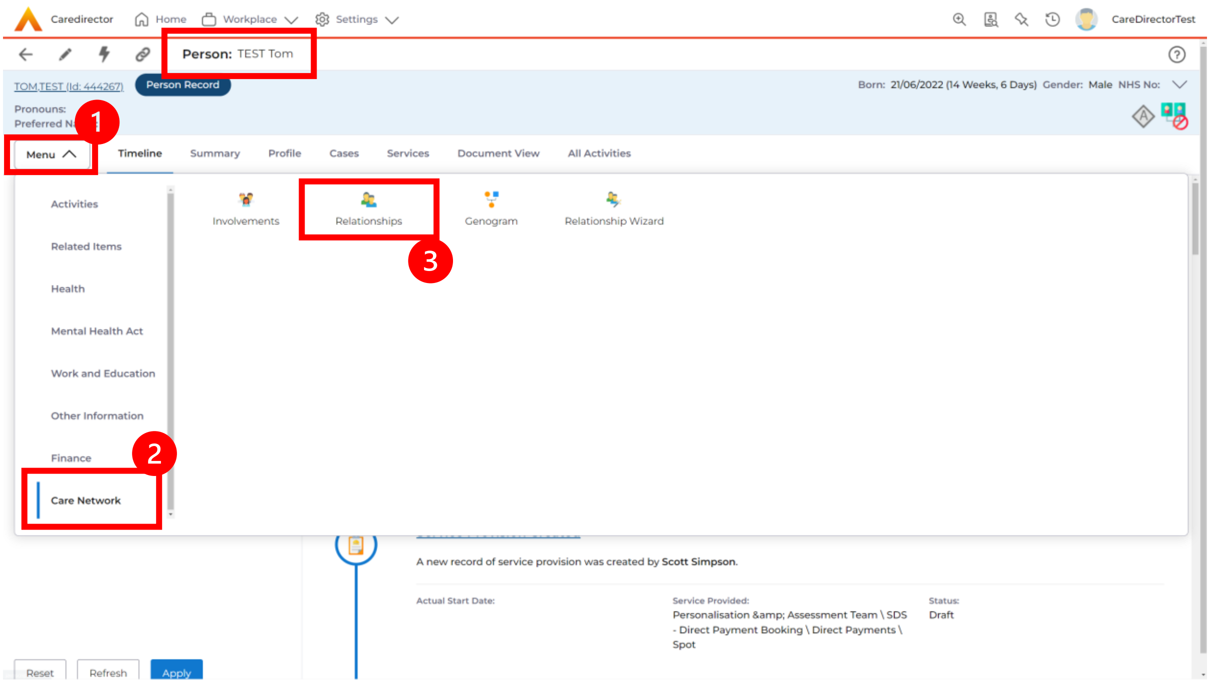


2. This will open the **Person Creation Screen.** Scroll down and edit the details required. When finished, select **Save and Return to Previous Page.**

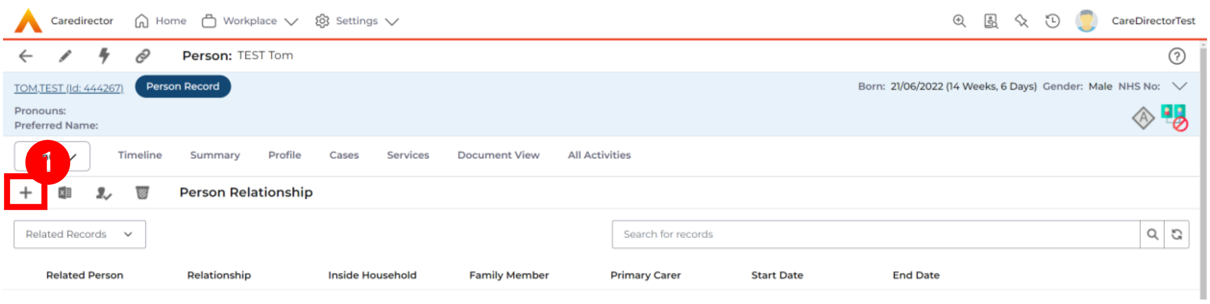


How to add relationships

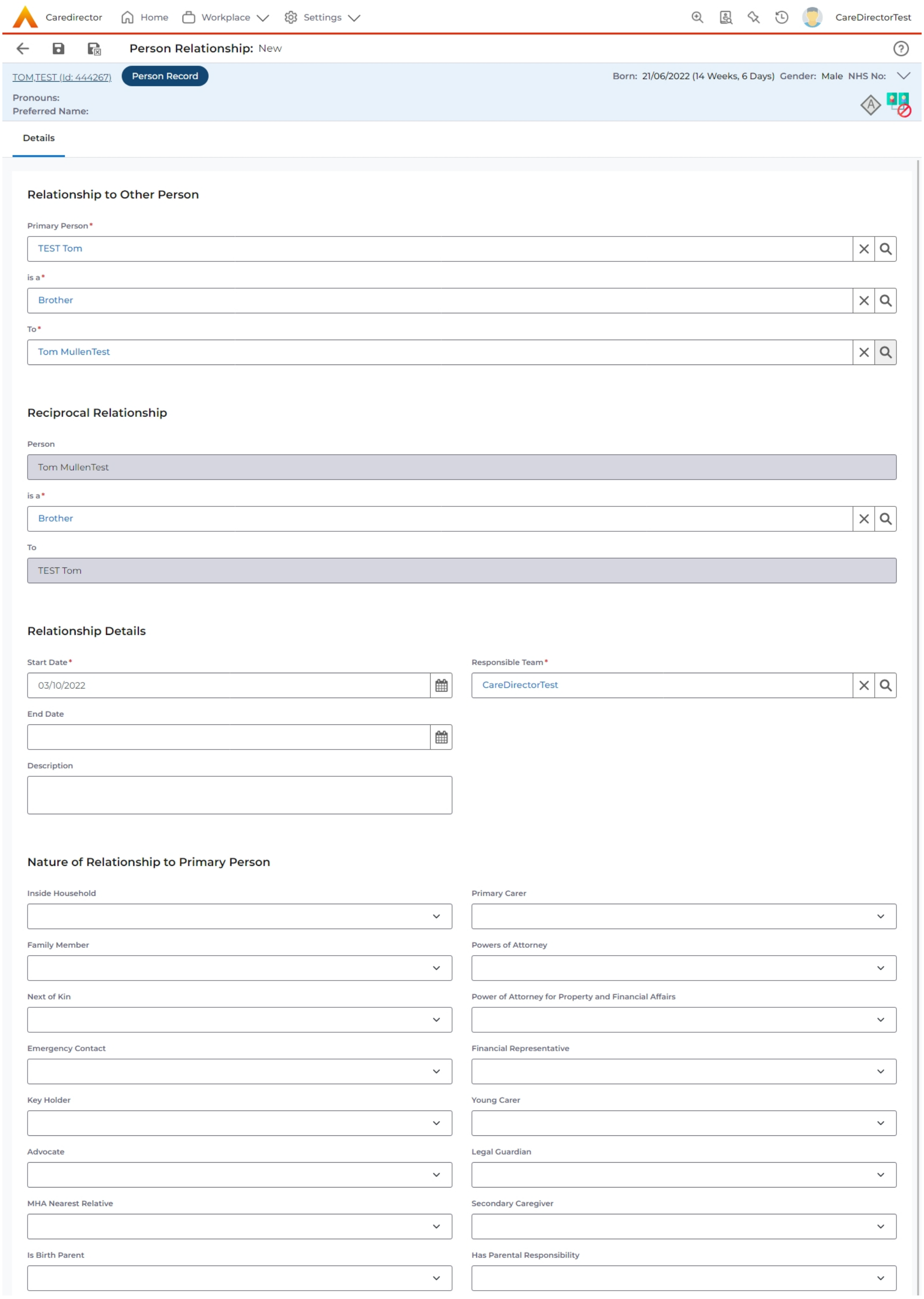
1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships.**



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



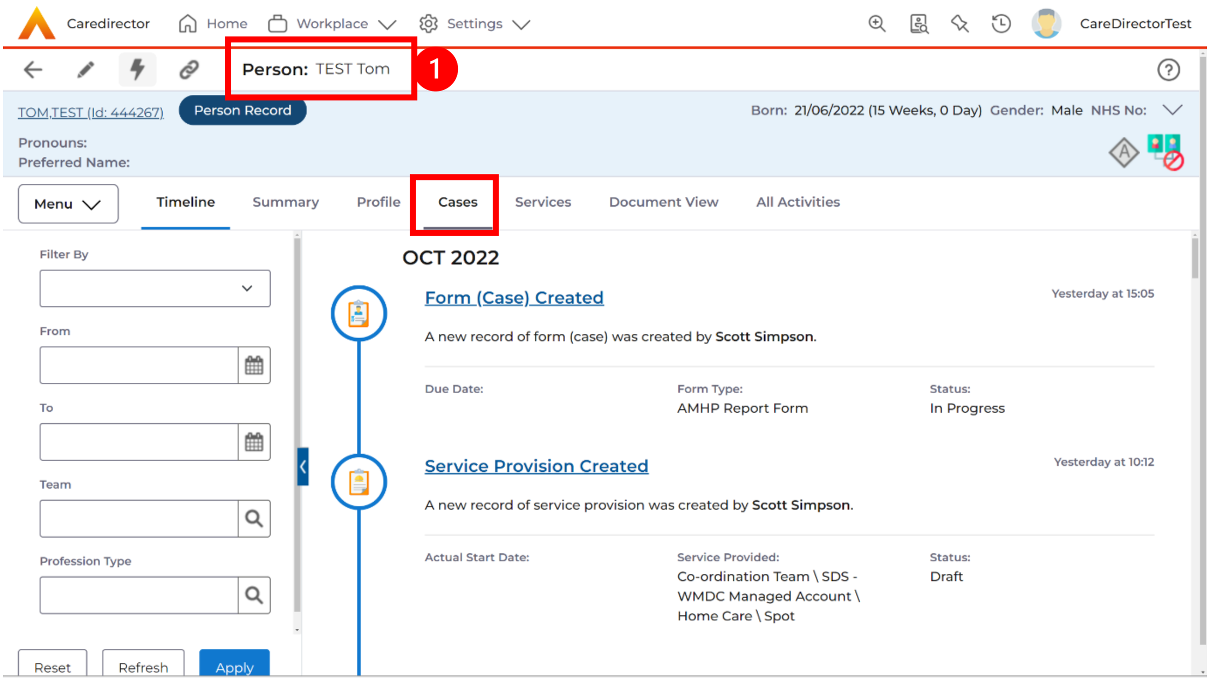
3. Inside this section:
   a. The **Service User** will be the **Primary Person**.
   b. **Is a** field, is what the **Primary Person** is **to** the other **Service User**.
   c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on 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.



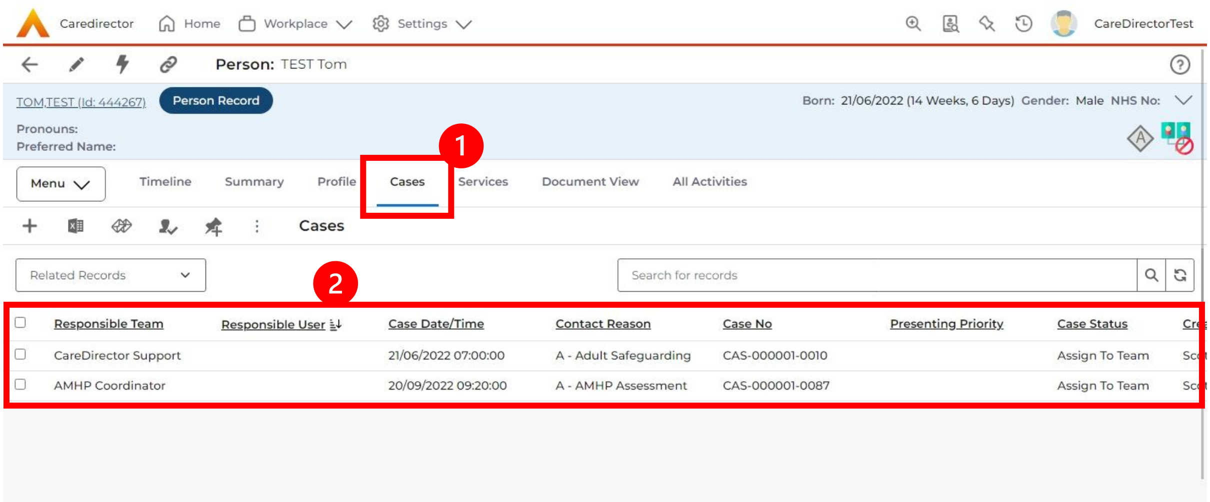
4. When finished, select **Save and Return to Previous Page.**

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.**

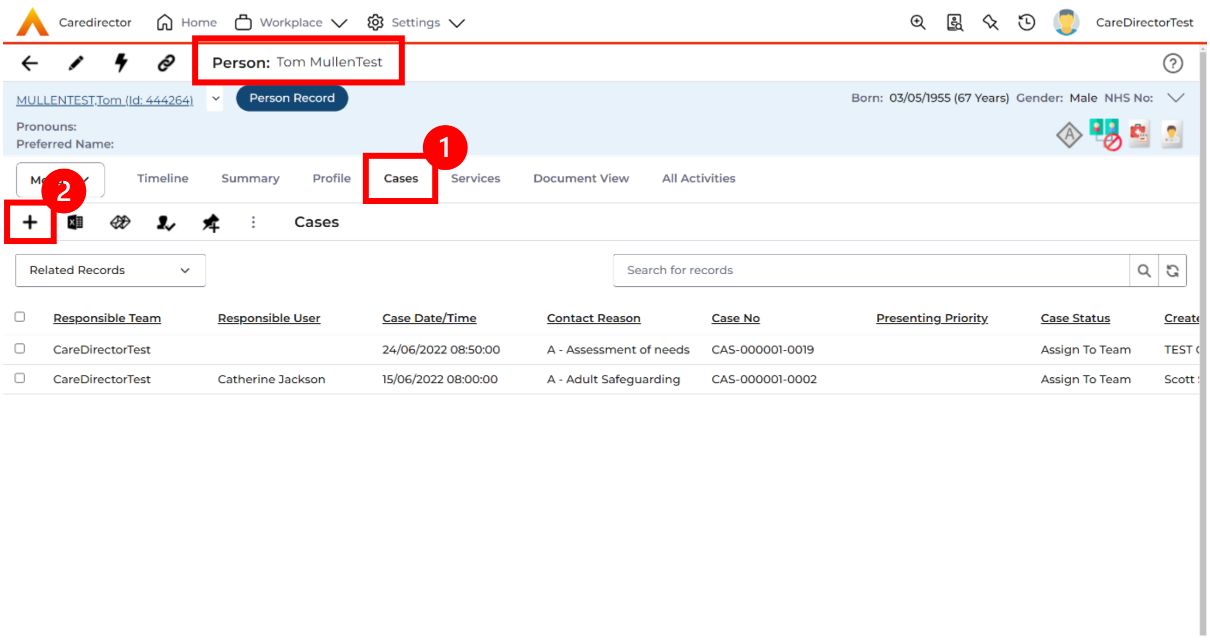


2. When found, select it to open the **Case Record**.

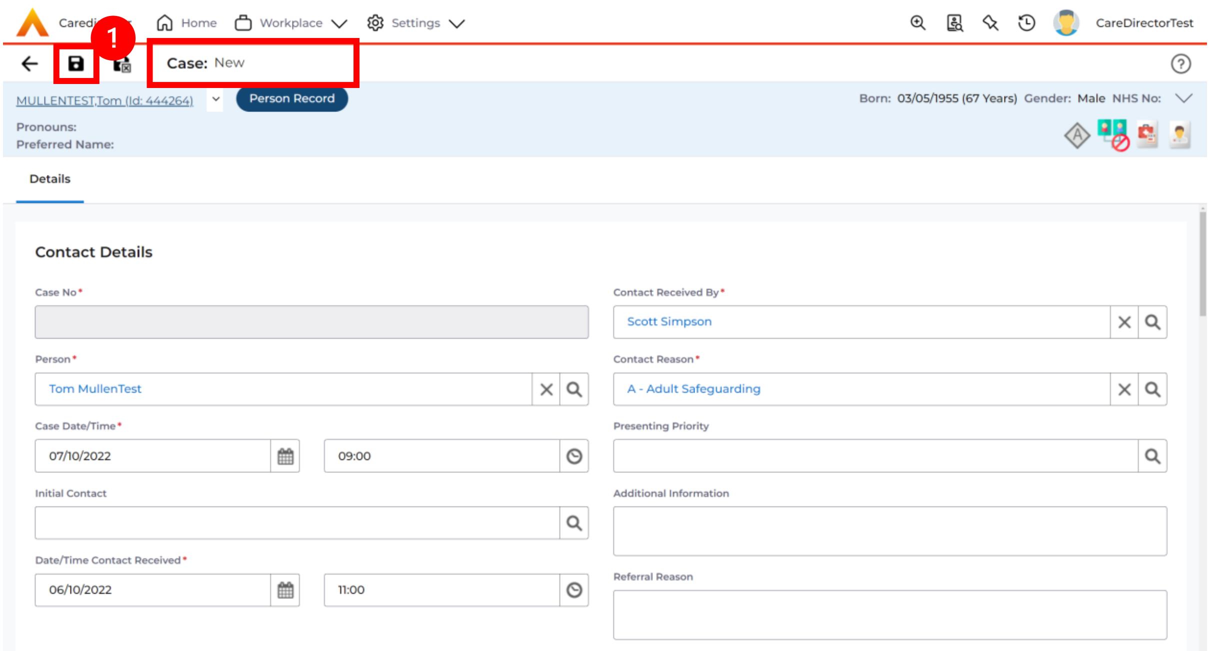


How to create a Case

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

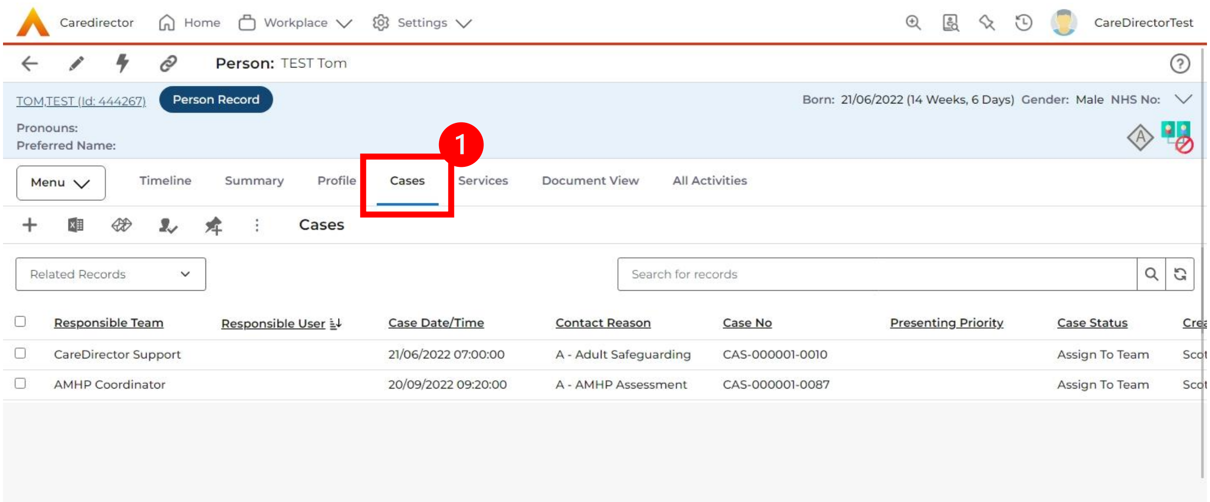


2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

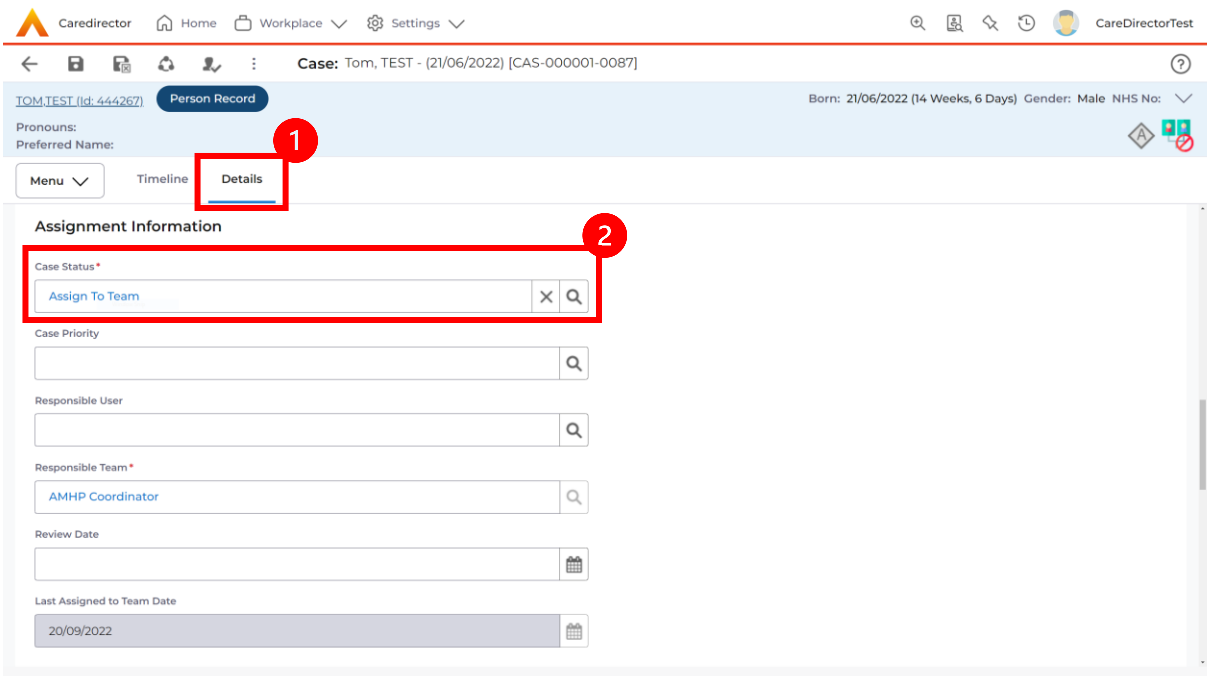


How to check the Case Status

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

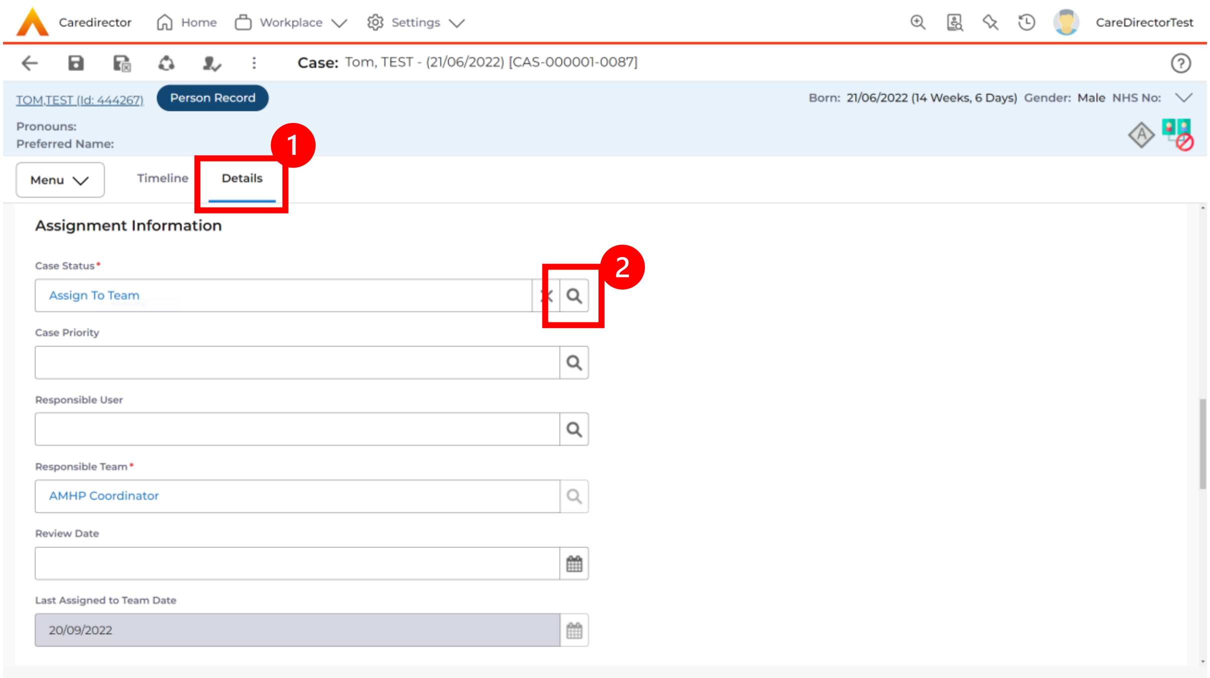


2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case** is **Allocated, Closed Under Review, etc.**

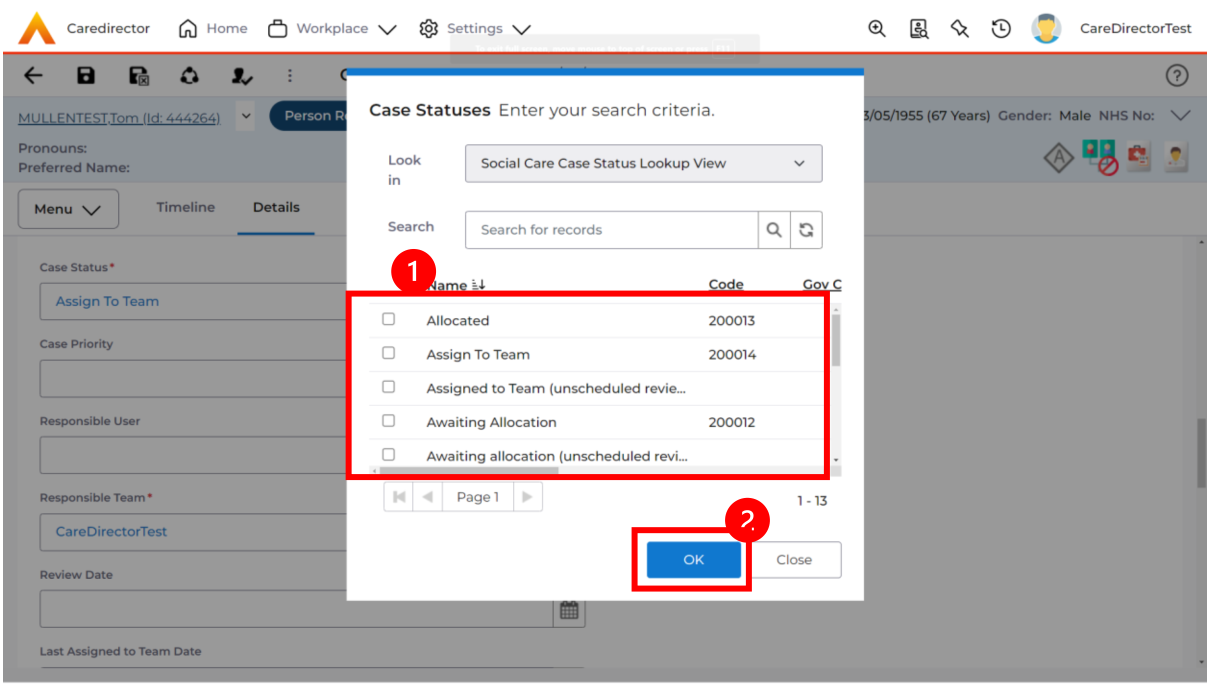


How to change the Case Status

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



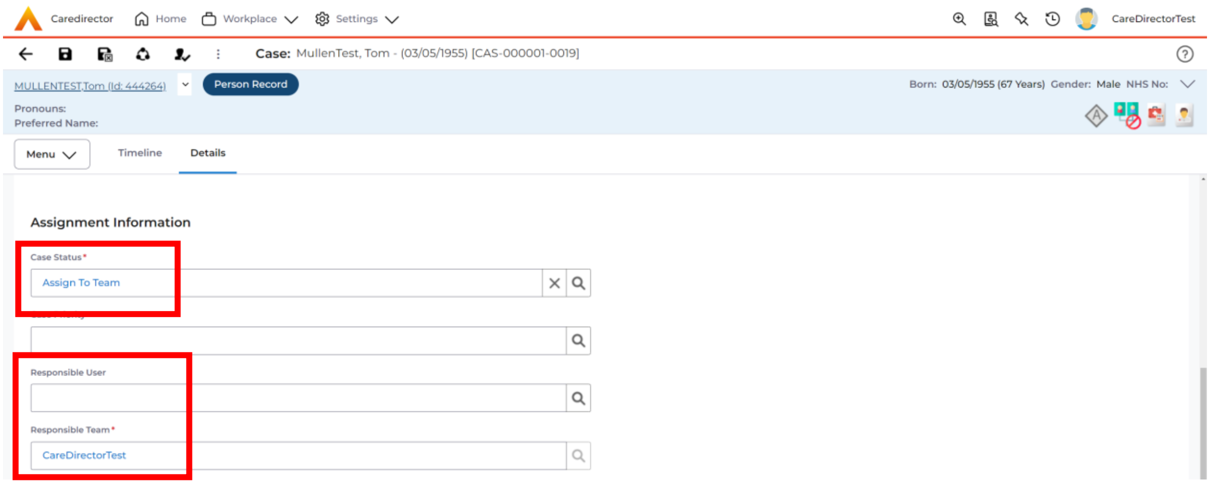
2. Choose the relevant option and select **OK** when found. Select **Save.**



How to Allocate a Case to a Worker

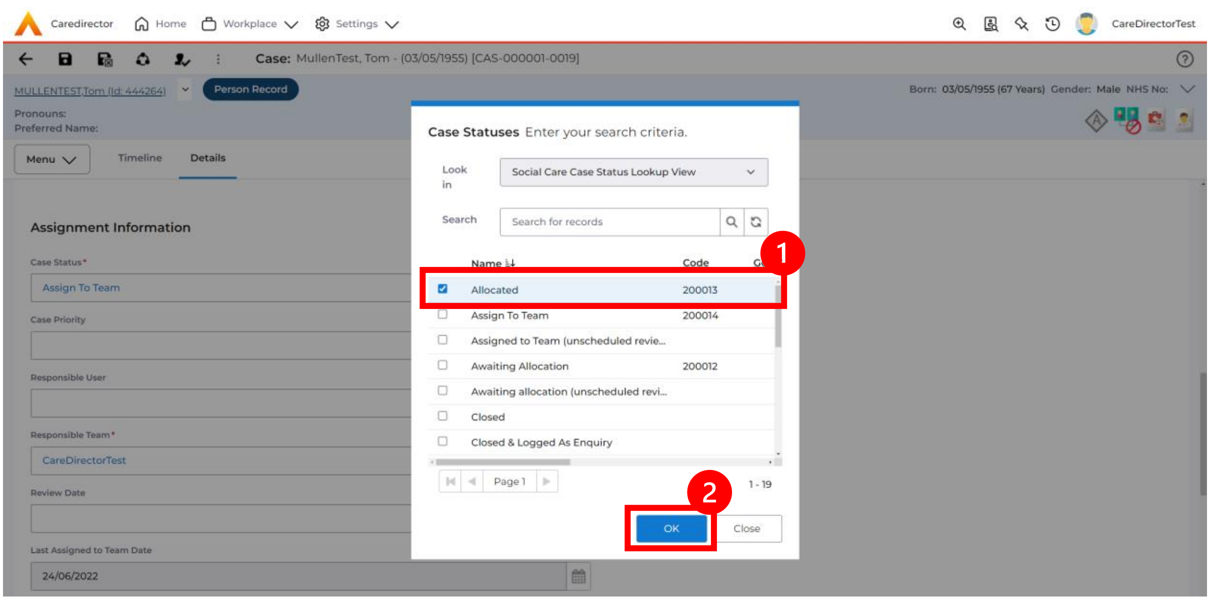
1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route.**

2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.

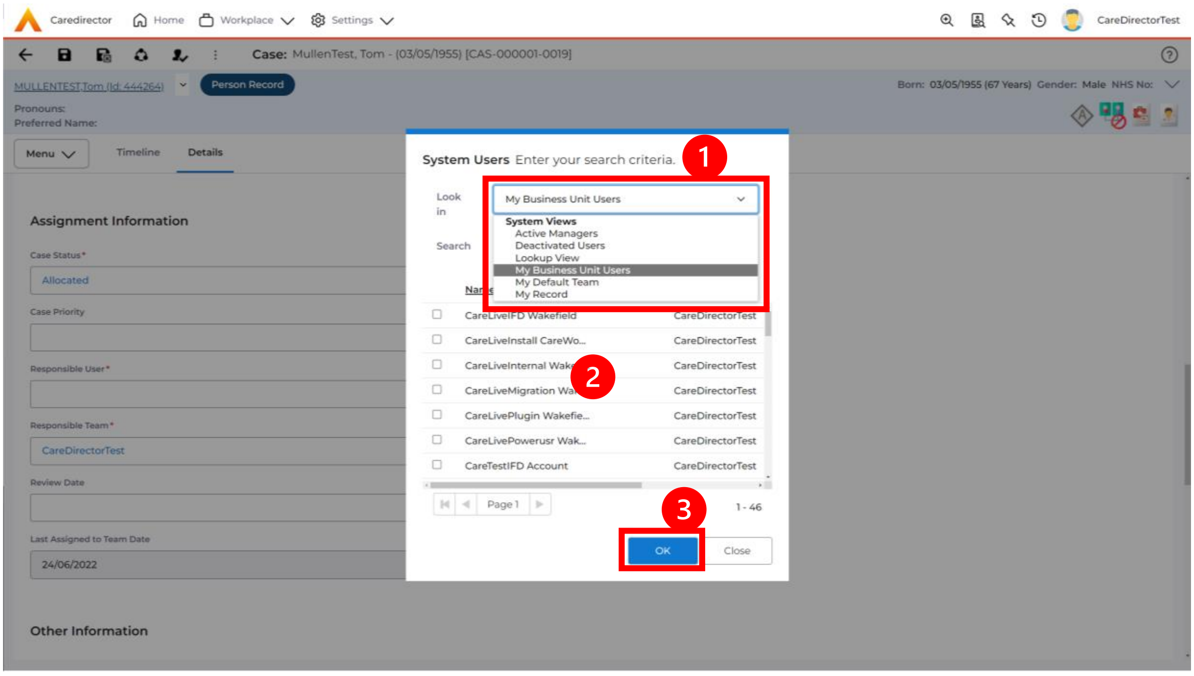


3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.

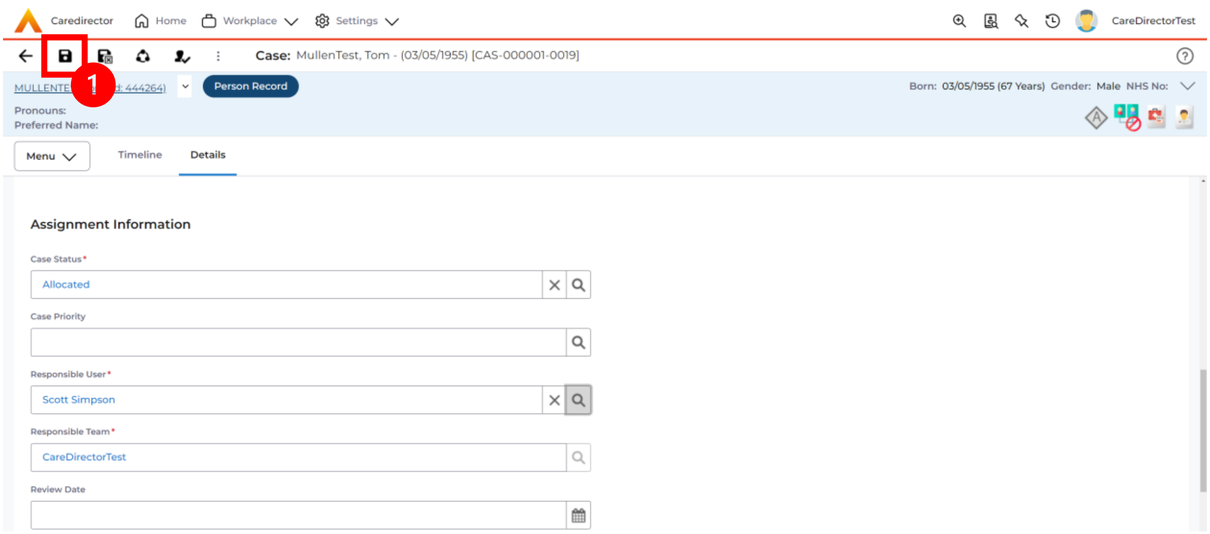
4. First select the **Lookup function** on the **Case Status** field and select **Allocate**. Then select **OK**.



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



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

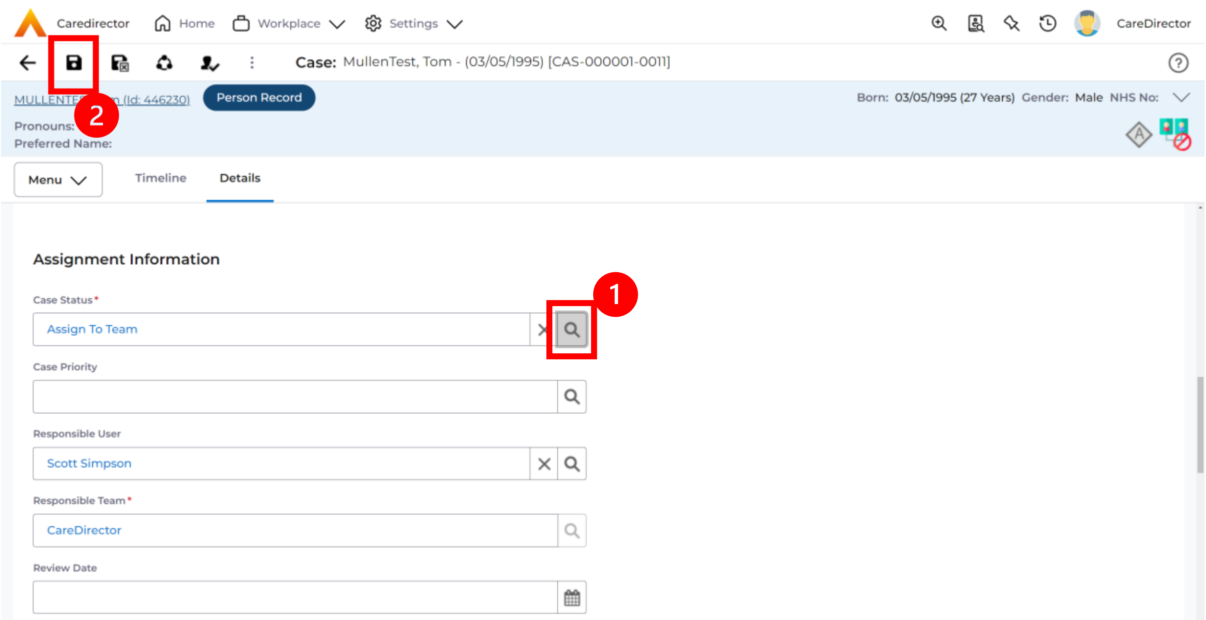


How to send a Case to another team

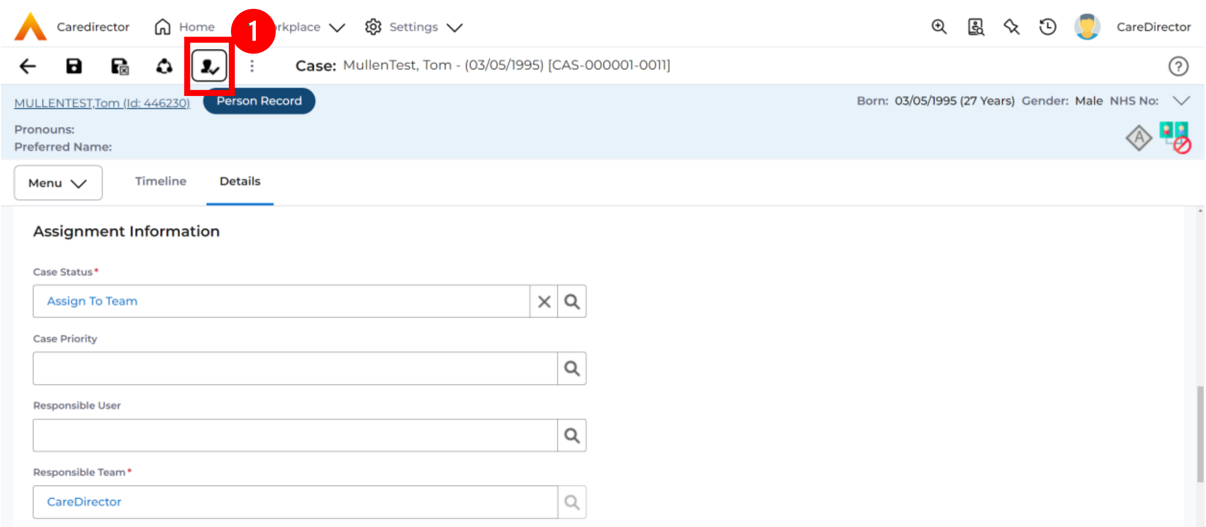
1. There may be reasons that a **Case** needs to be sent to another team.

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**.

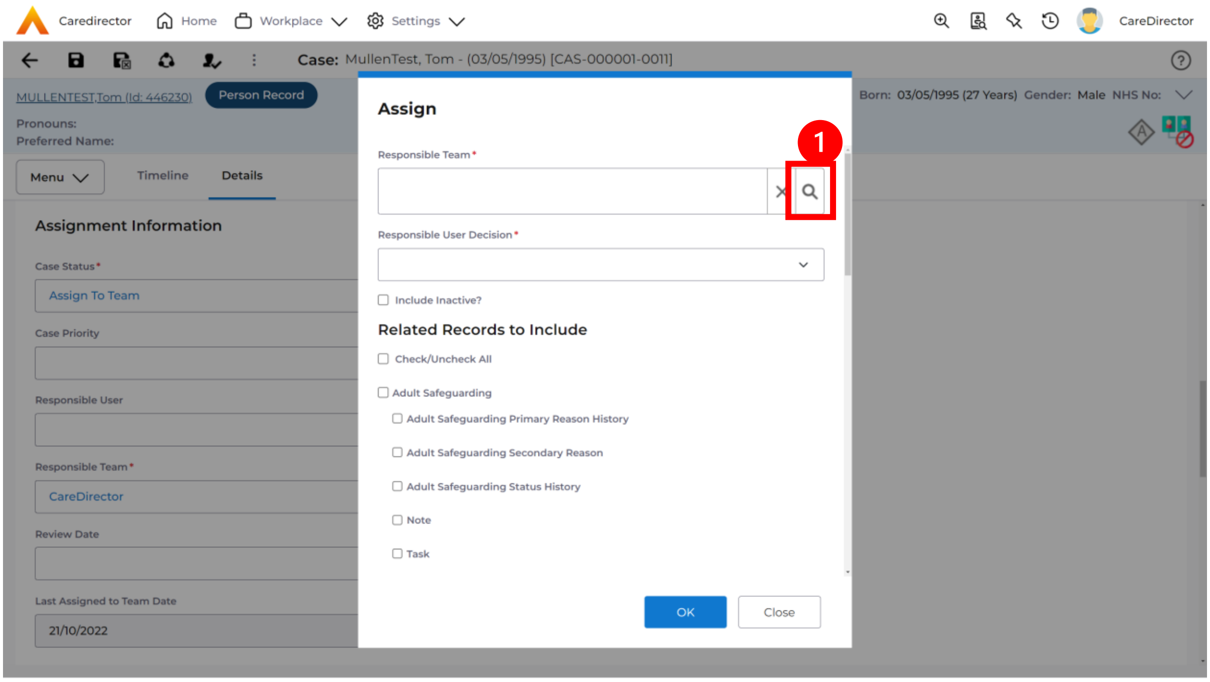
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save.**



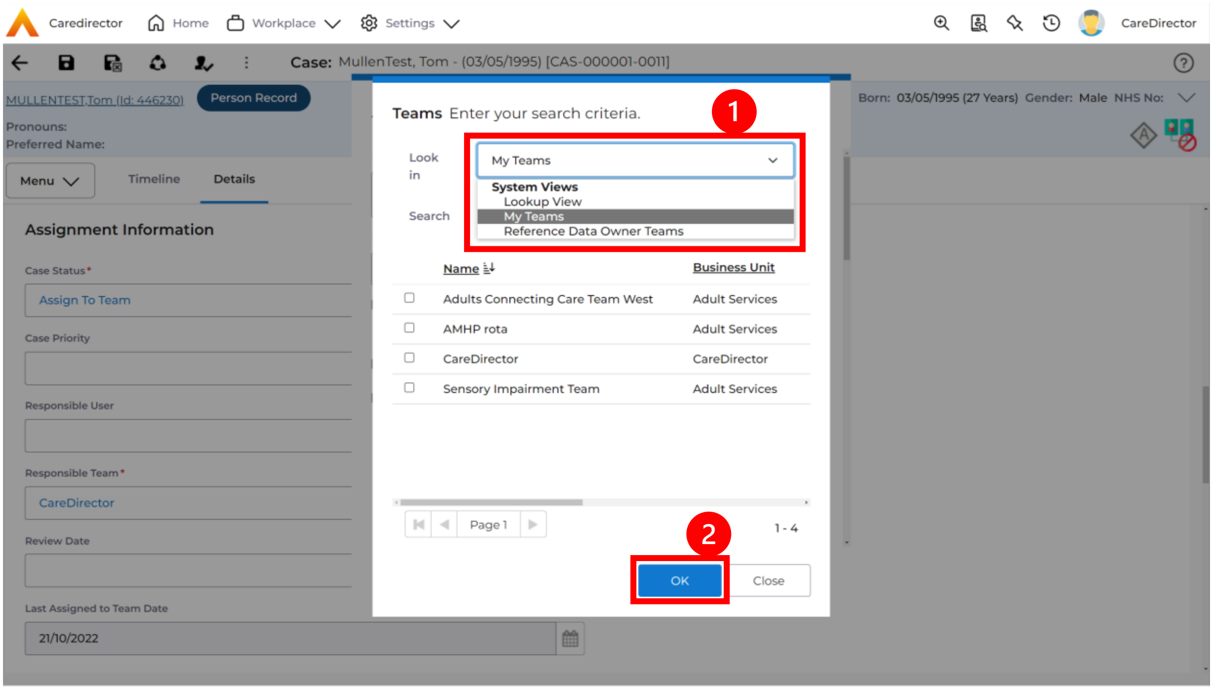
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.



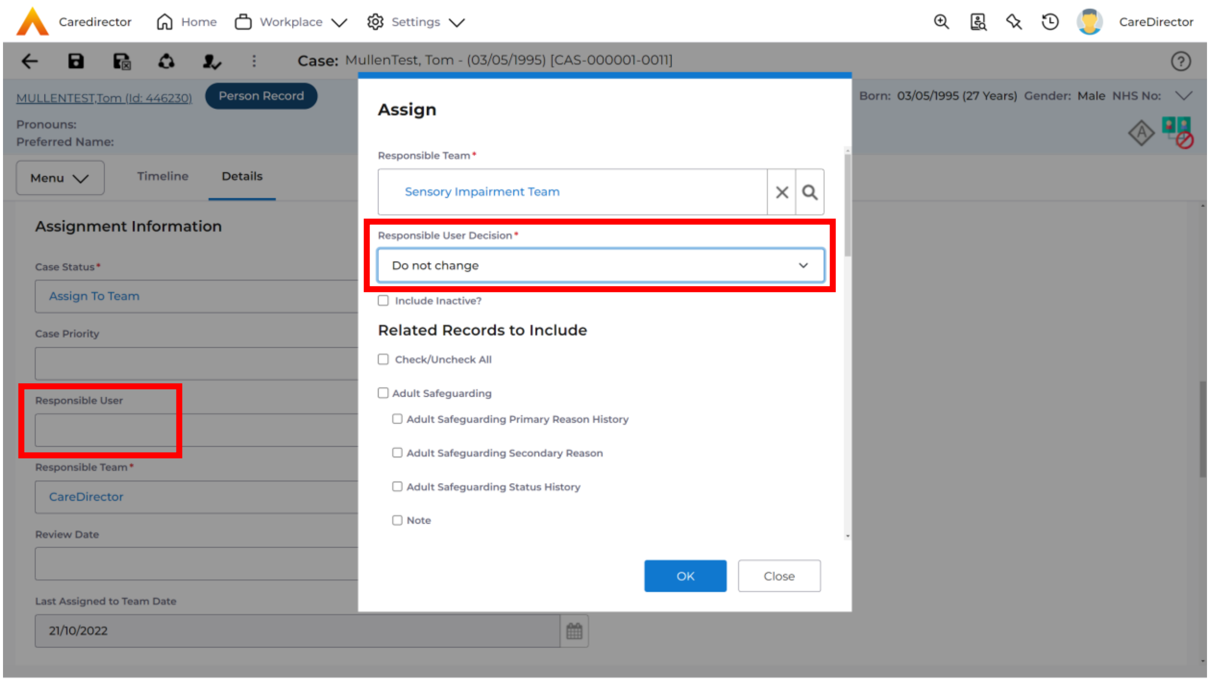
5. This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup function.**



6. 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.**



7. 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.**

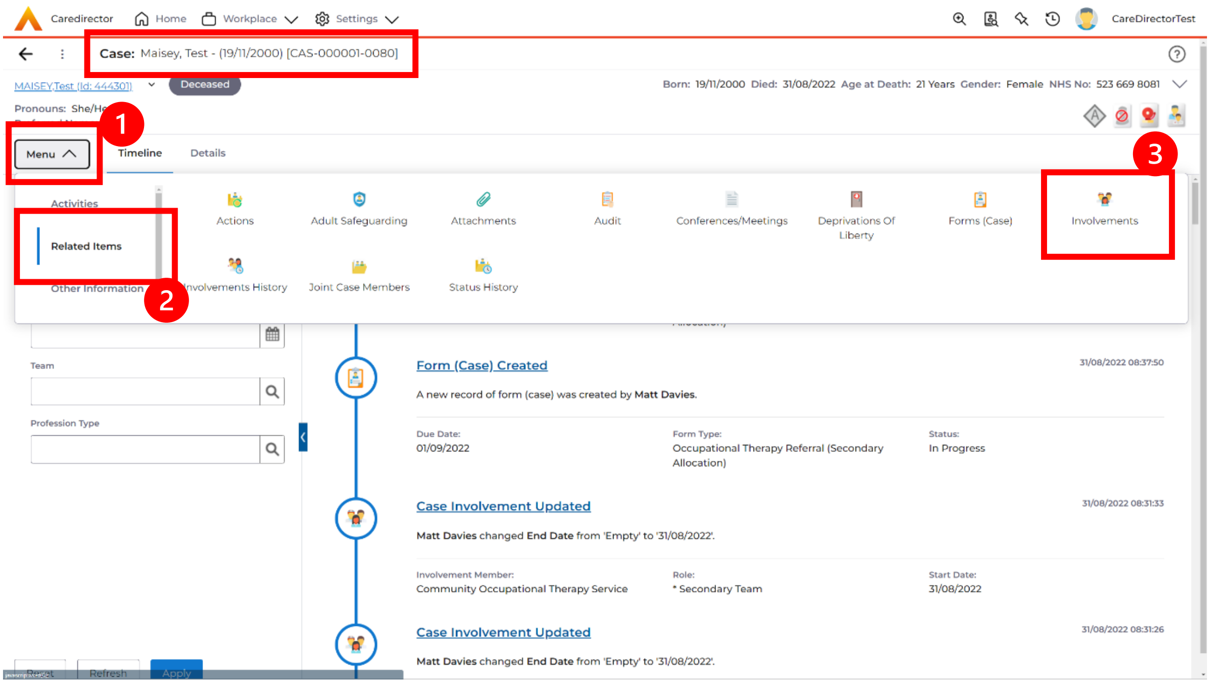


8. When finished, select **OK.** It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

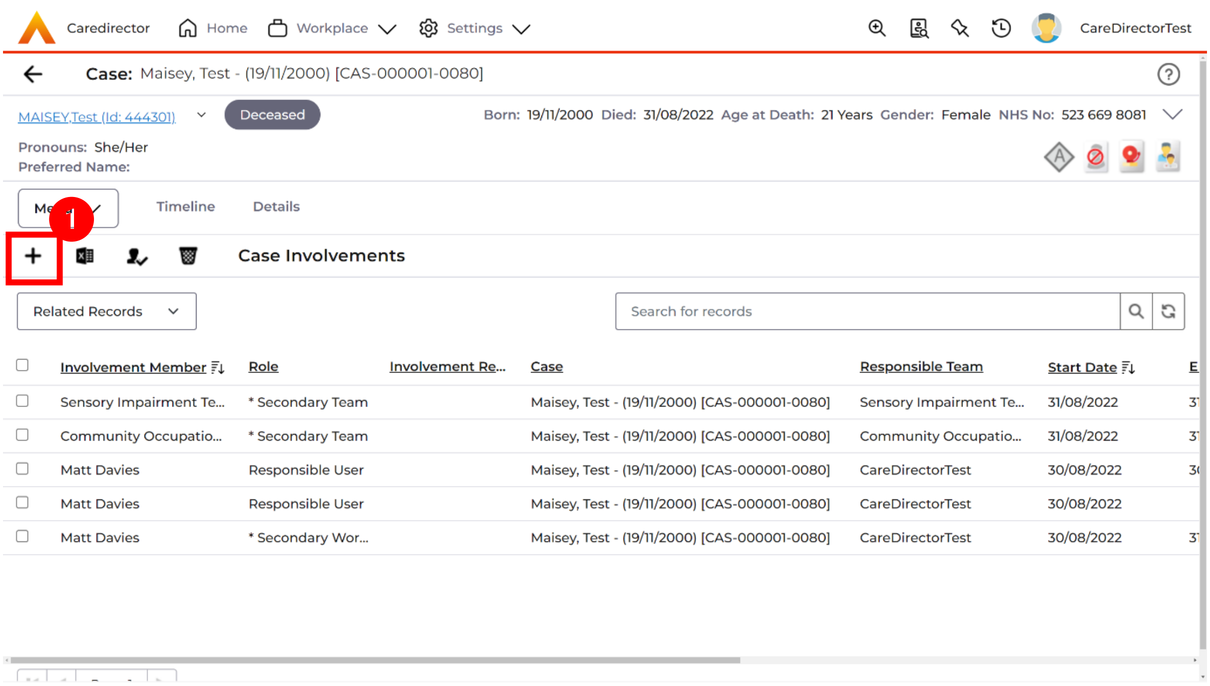
How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.

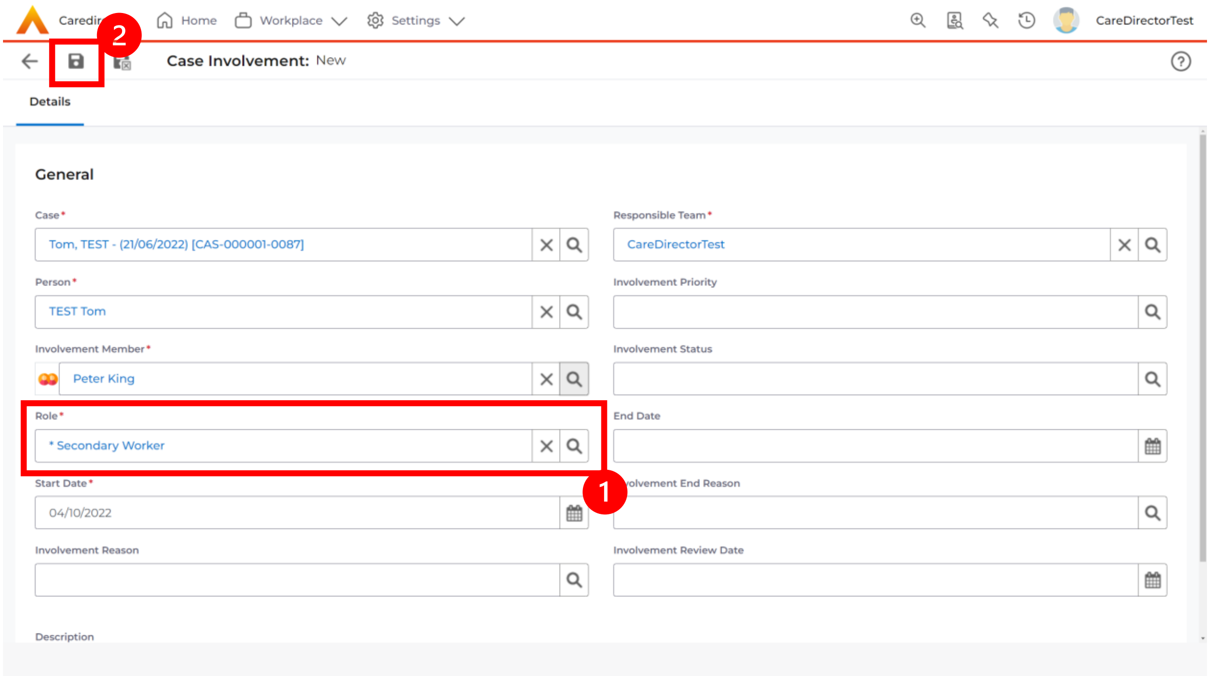
2. Select **Menu, Care Network** select **Involvements.**



3. Within this screen, select **Create New Record** on the toolbar.

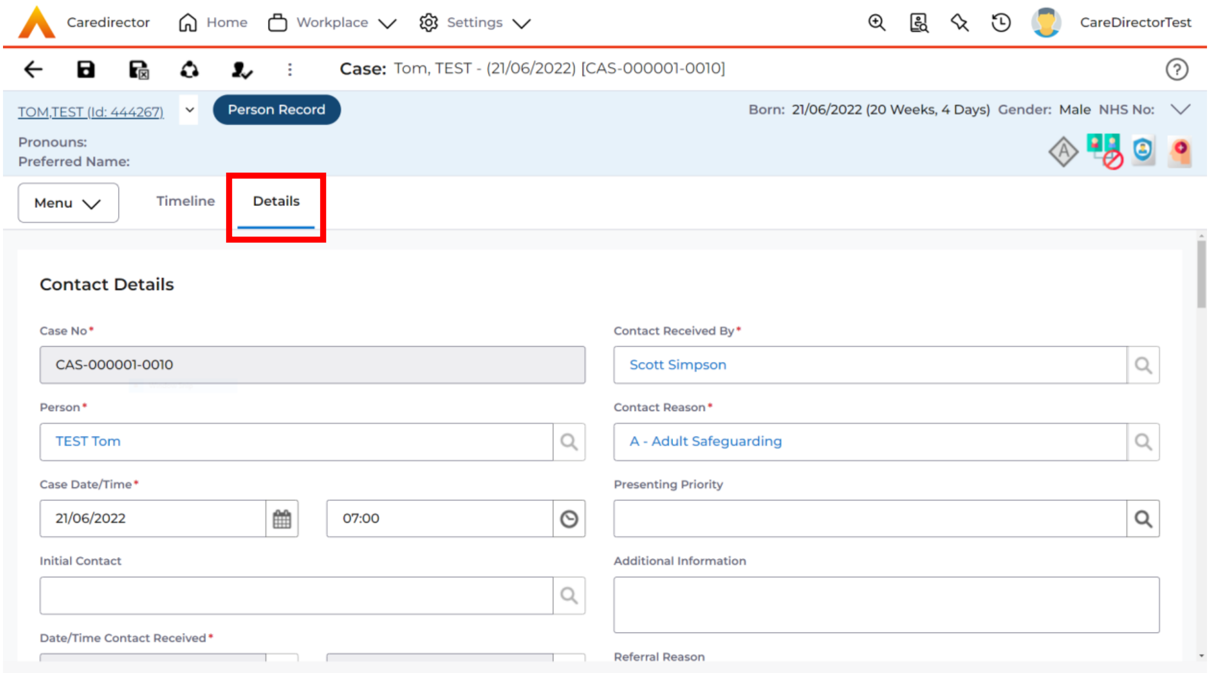


4. Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save.**

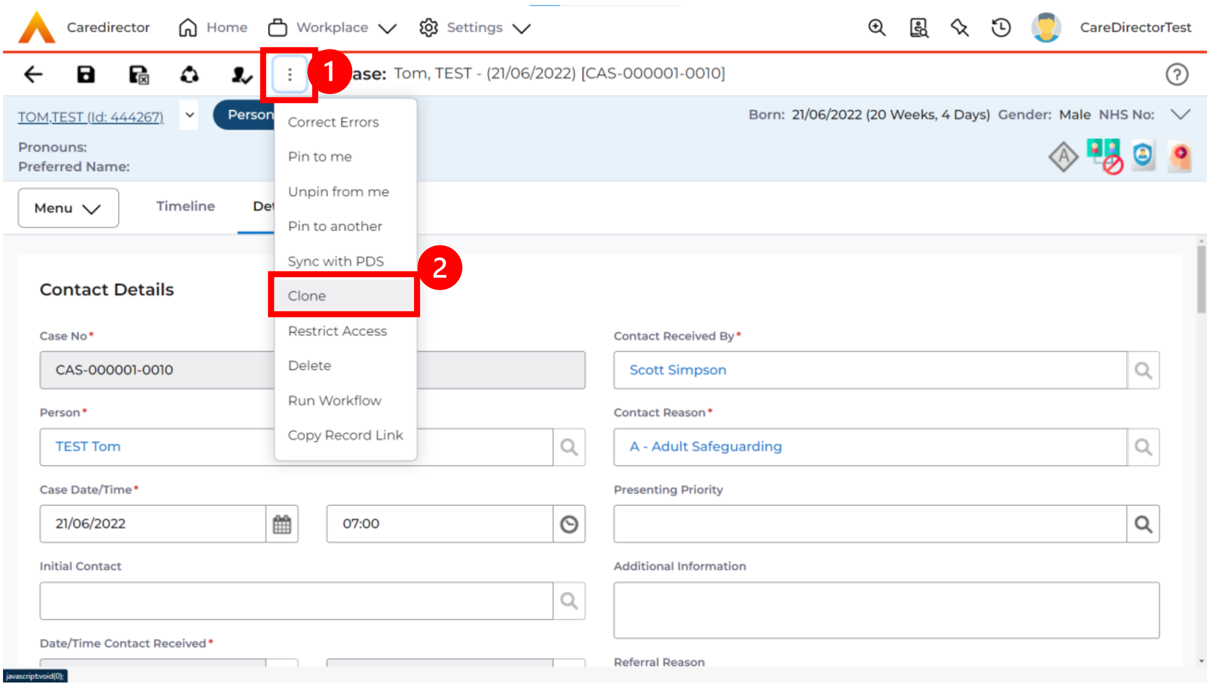


How to clone a Case

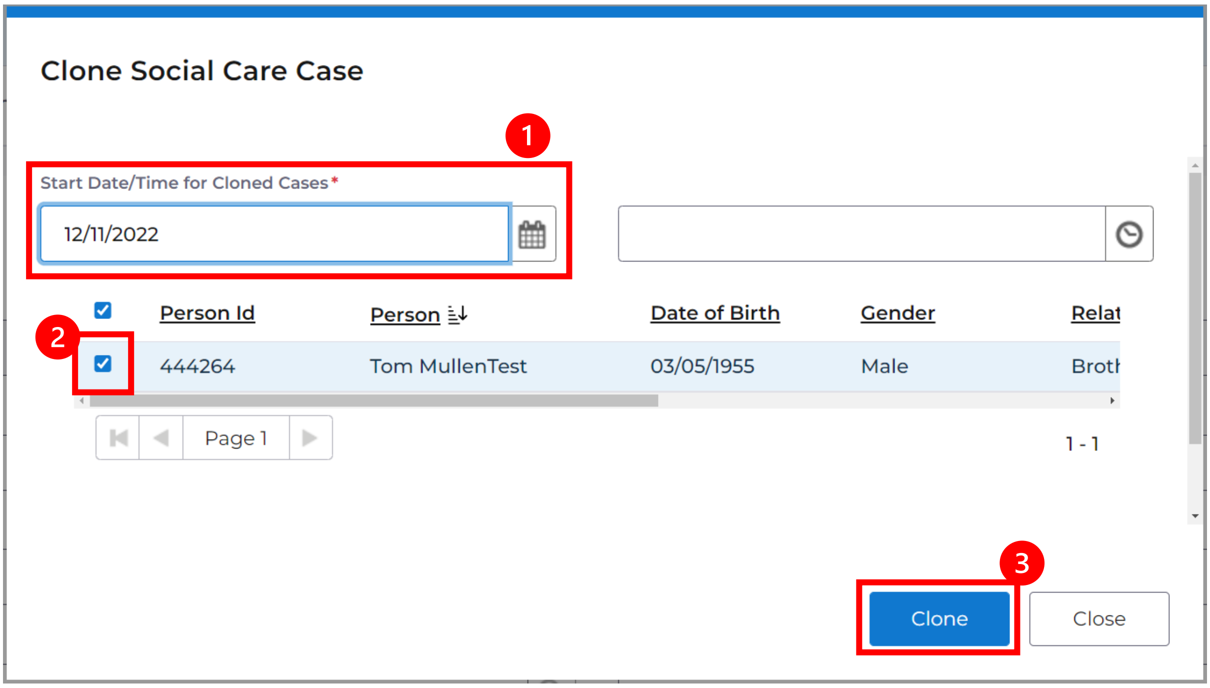
1. Locate the **Case** you want to **Clone**. Select **Details** tab.



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

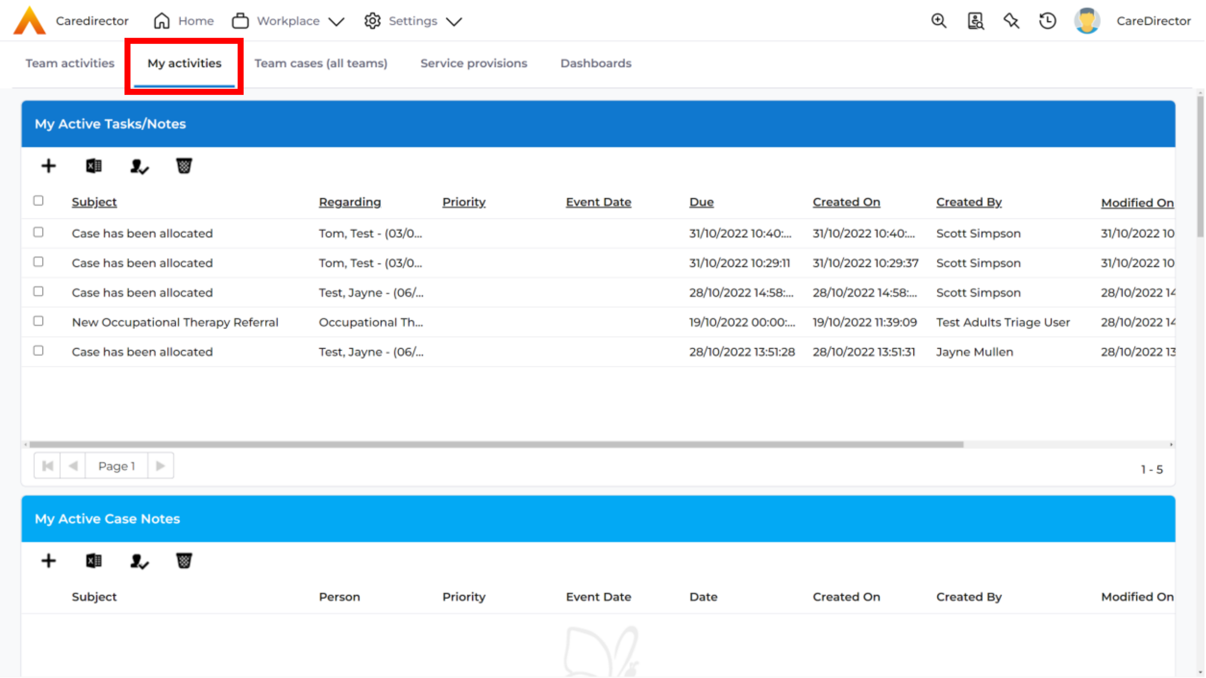


3. This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone.**

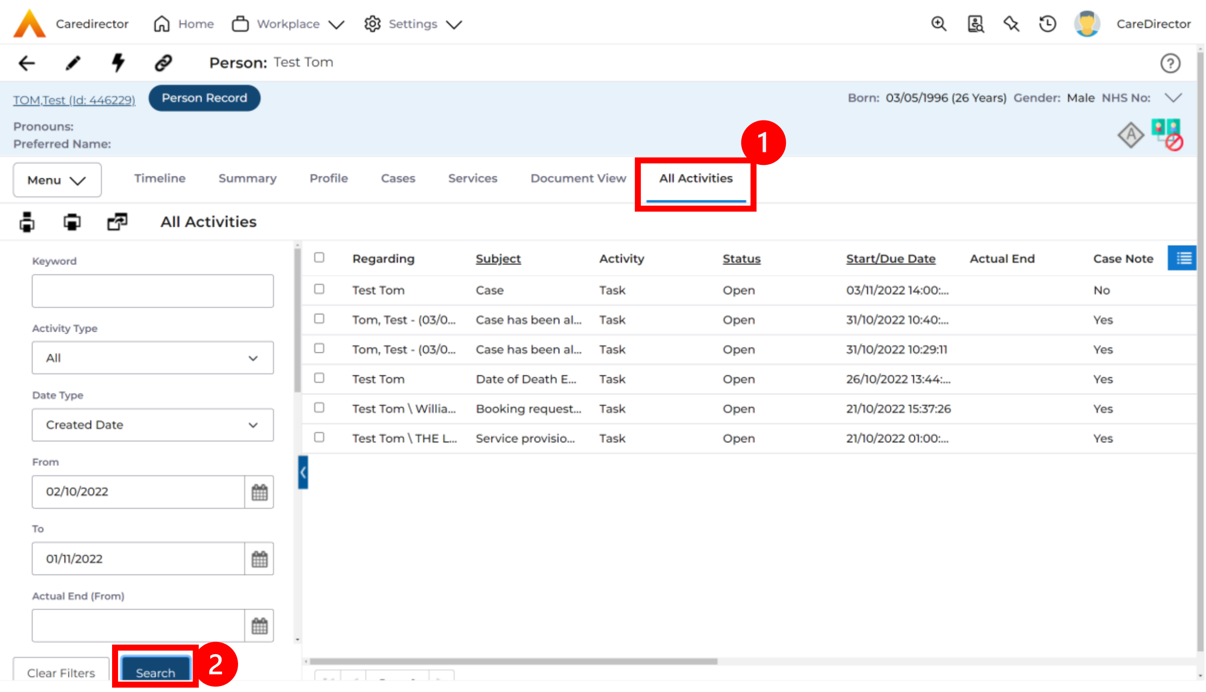


How to find Activities

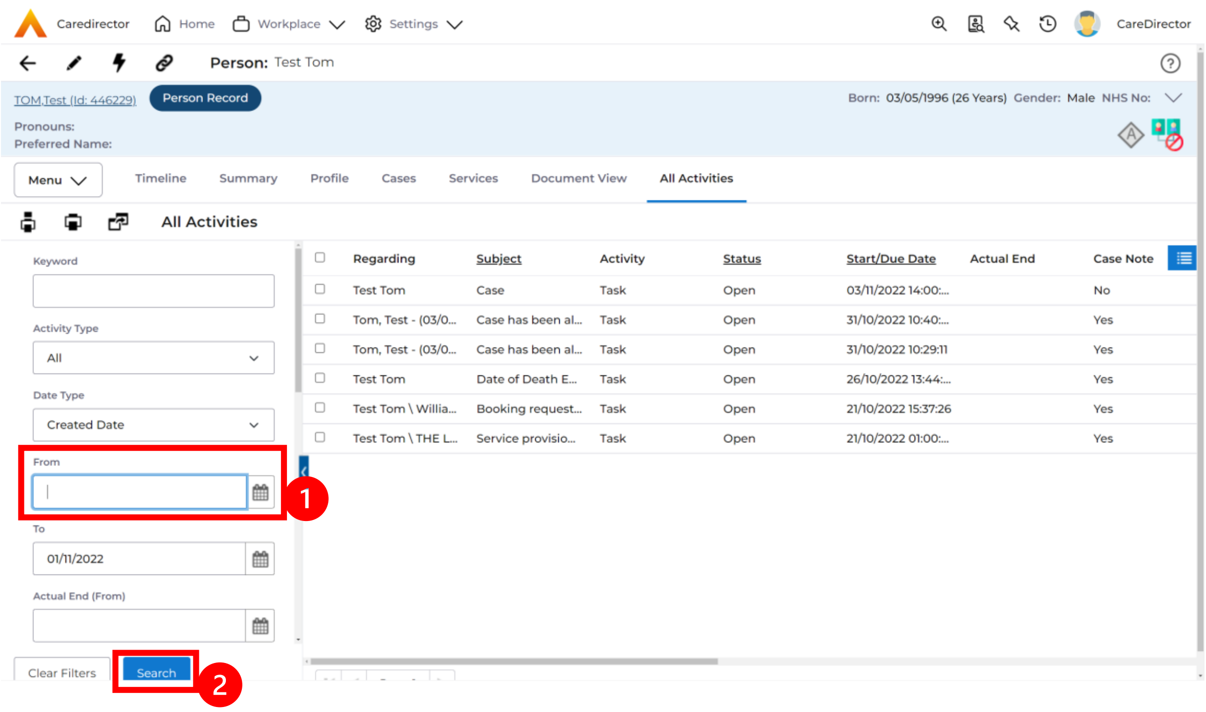
1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.



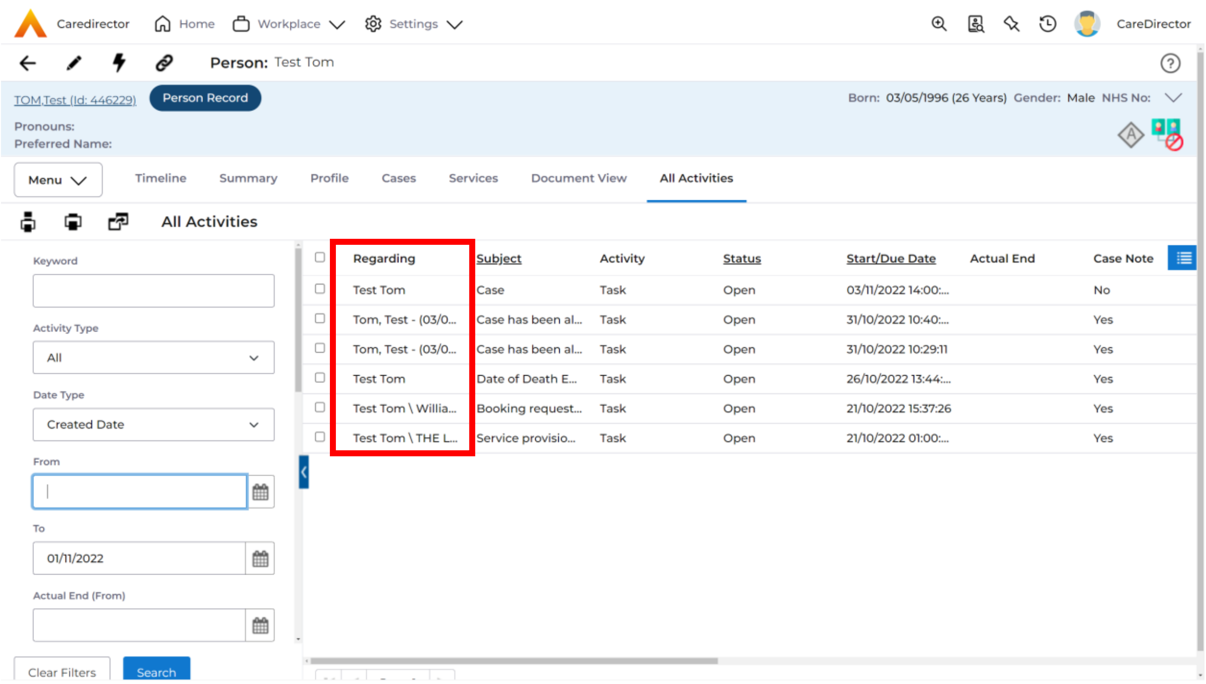
2. If locating **Activities** on **Person Record** then locate the **Person Record.** Then select the tab **All Activities** then select **Search.**



3. This can be filtered further using the options on the left. By default, the search will bring through all **Activities** that are linked to that **Service User** for the past month. Delete the **From Date** to bring through all.

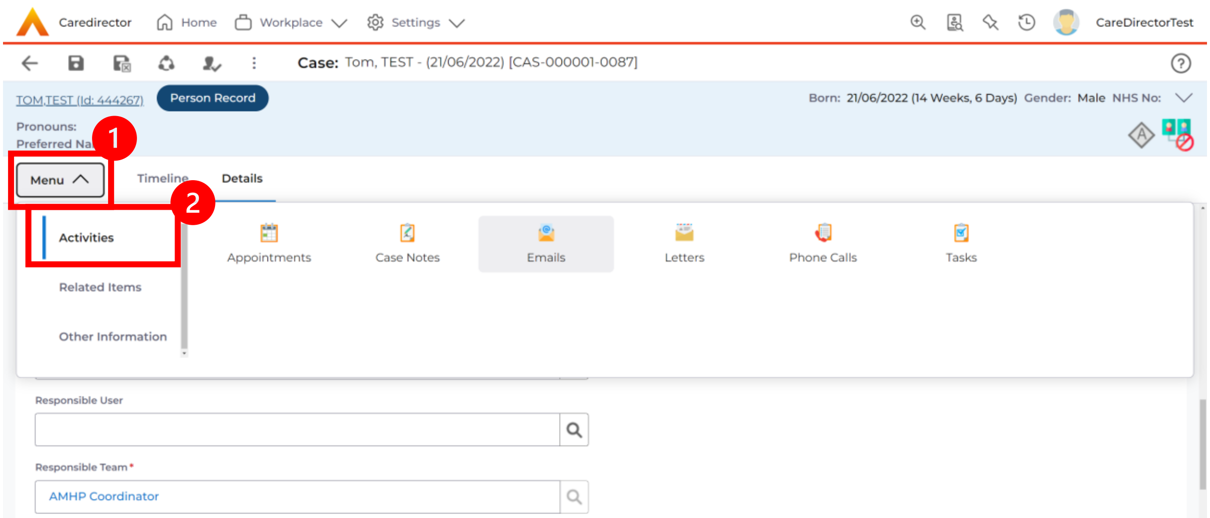


4. If you want to see where that **Activity** is from. Look on the **Regarding** column.

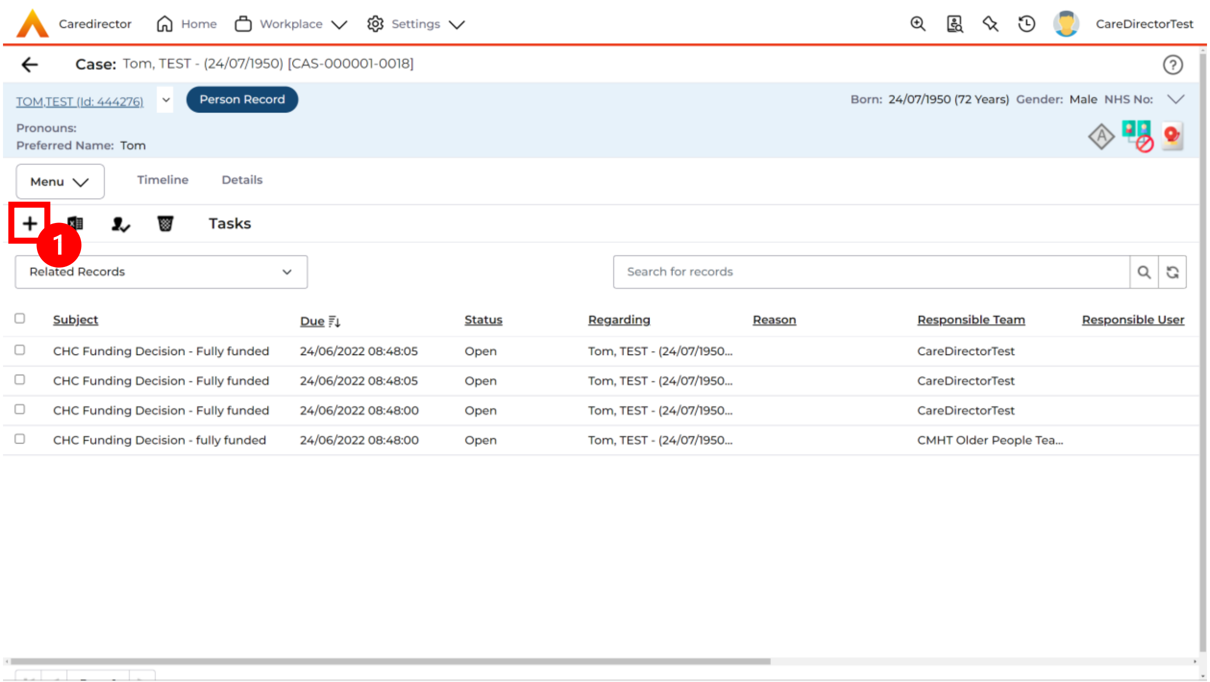


How to input an Activity

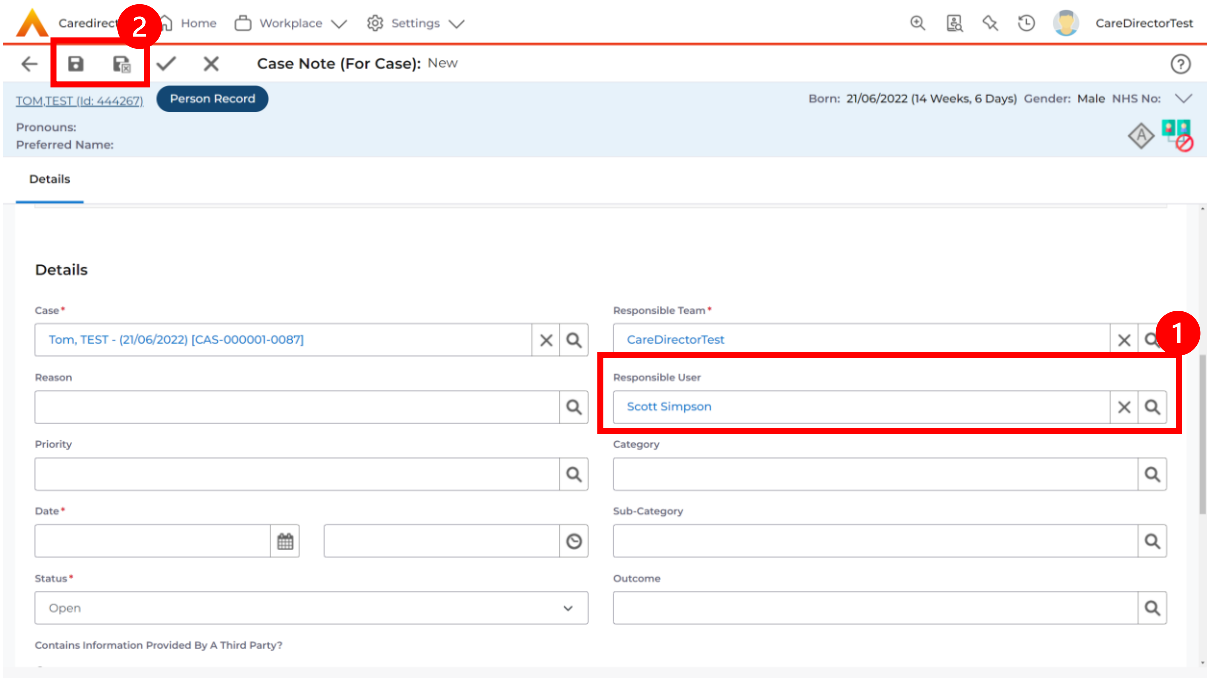
1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.



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



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

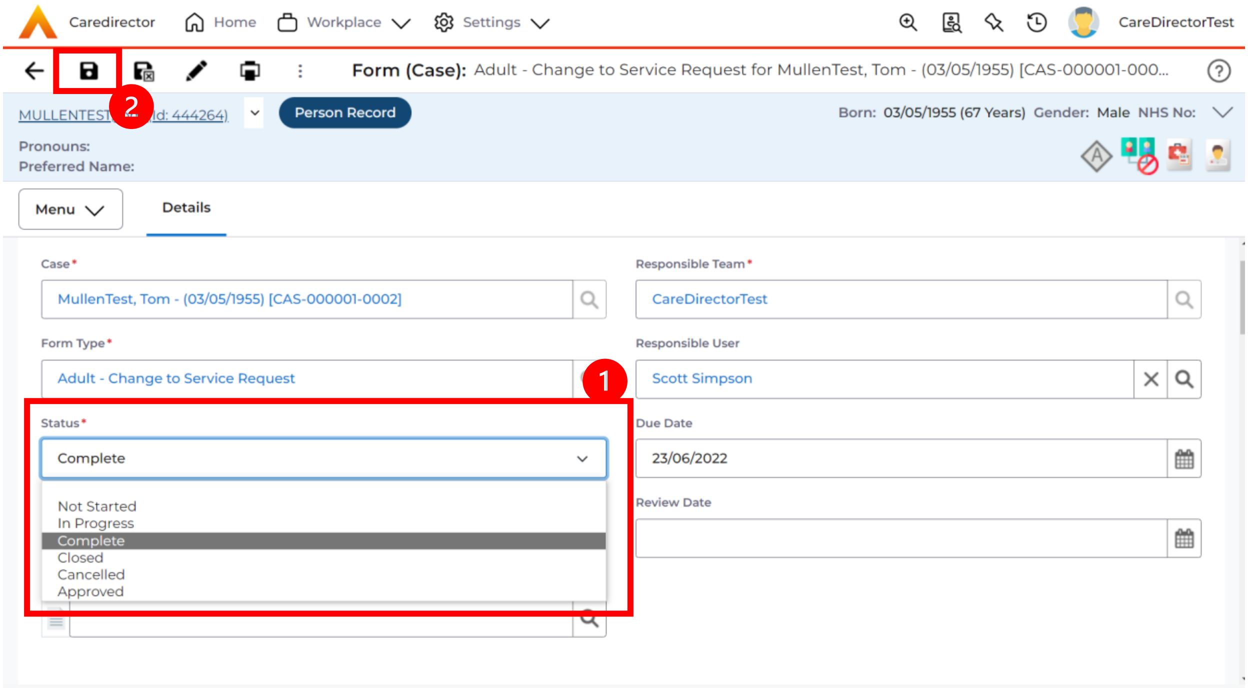


4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

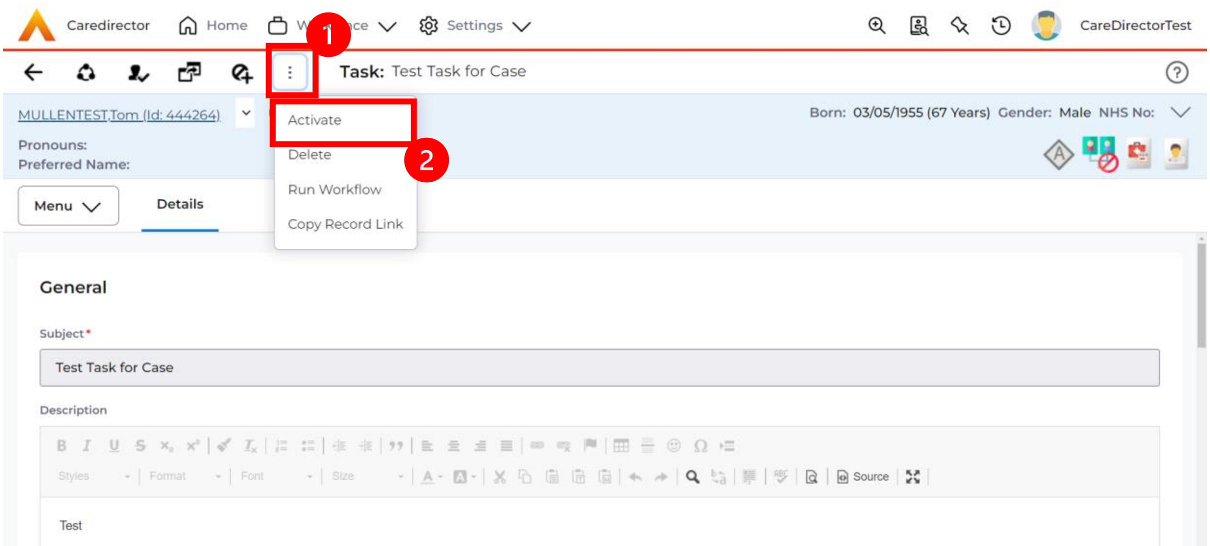
How to change status to Complete (Re-activate Activities)

1. Select the **Form** or **Activity** that requires to be **Completed.** This will send an **Activity** to your **Team Managers** dashboard for them to approve.

2. Under **Status** use the dropdown list to select **Completed.** After select **Save.**

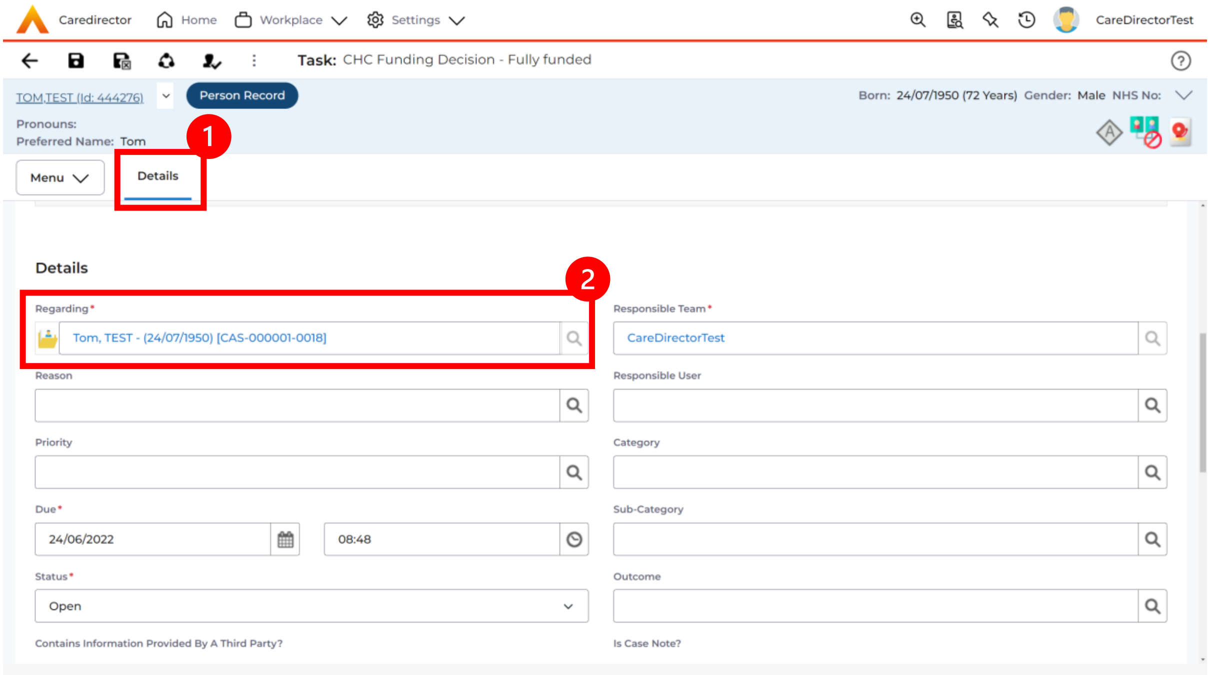


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.



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

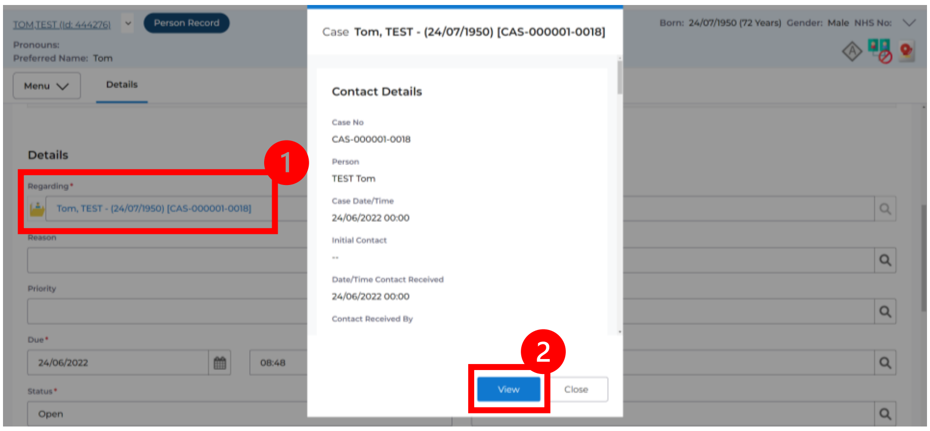
1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding.**



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

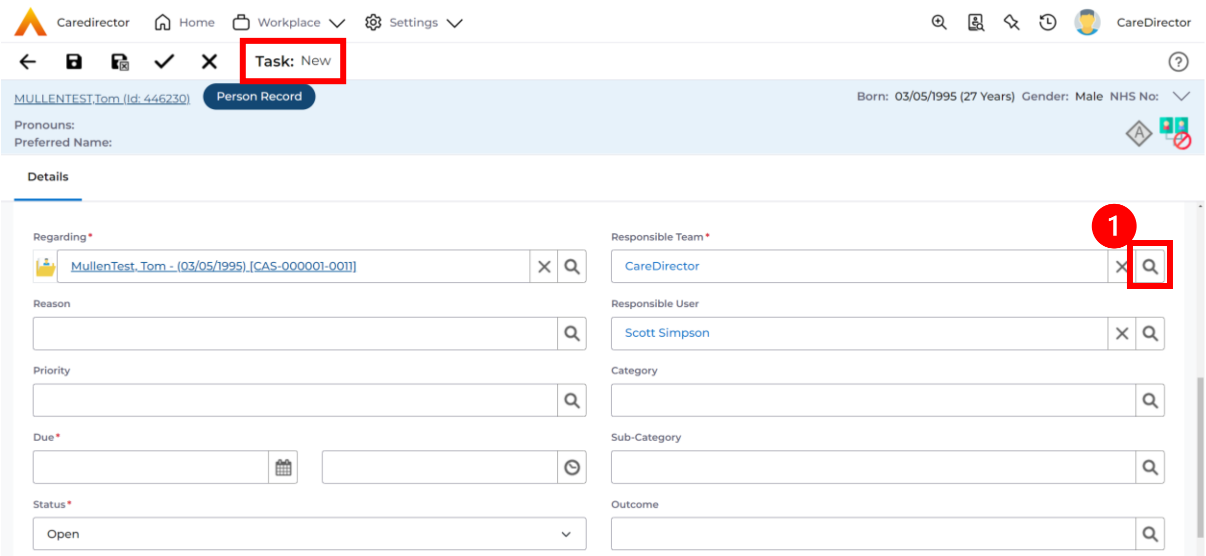
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test.** It is linked to a **Person Record**.

4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record)** and go into the record by selecting **View.**

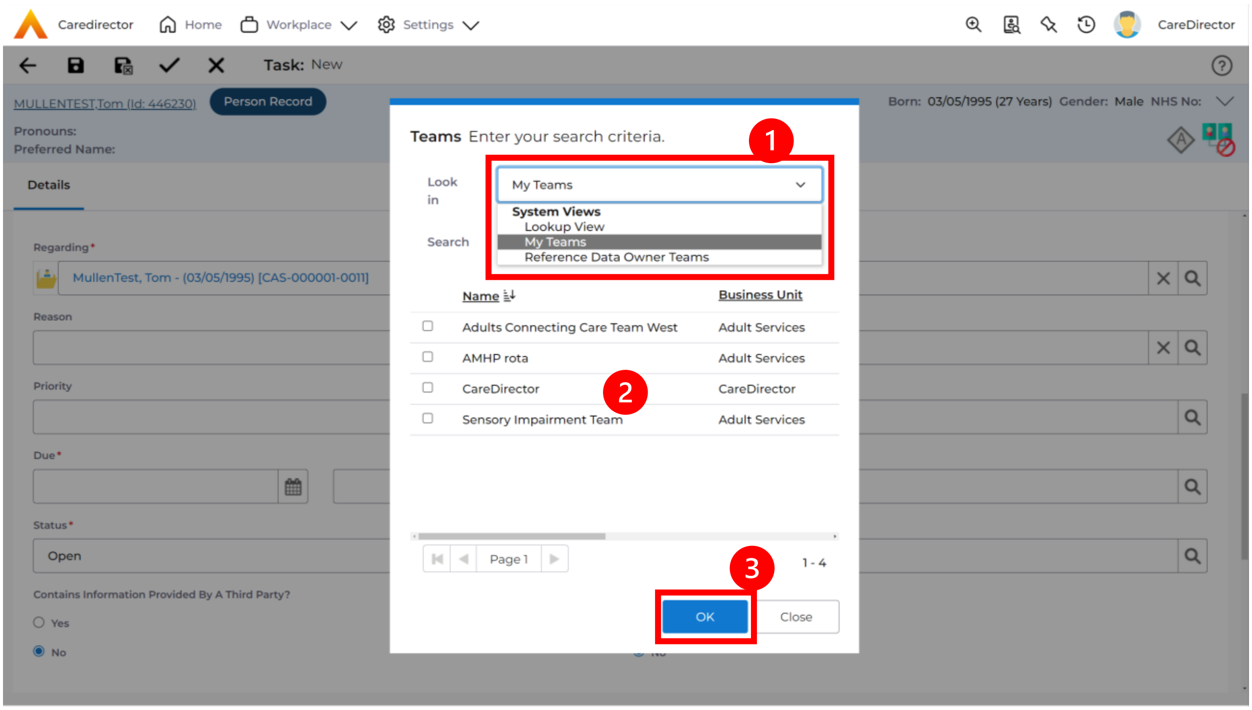


How to Allocate a new Activity to another team

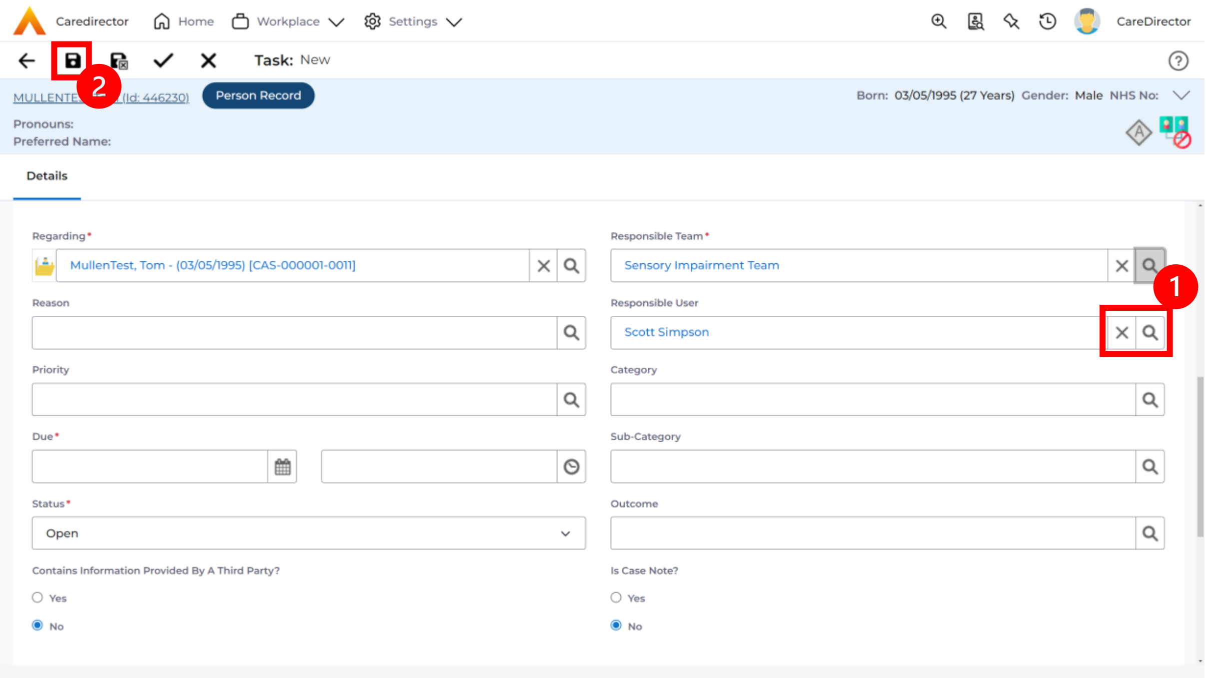
1. Before saving a new **Activity,** you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup function**.



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

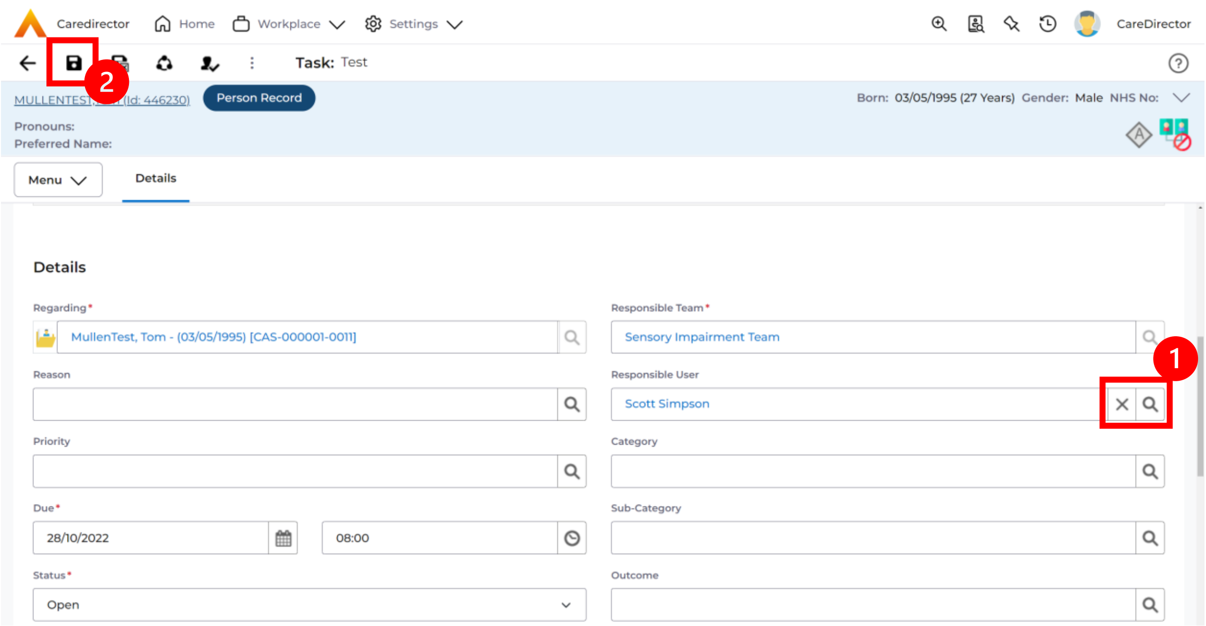


3. If you know the **Responsible User** use the **Lookup function**, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

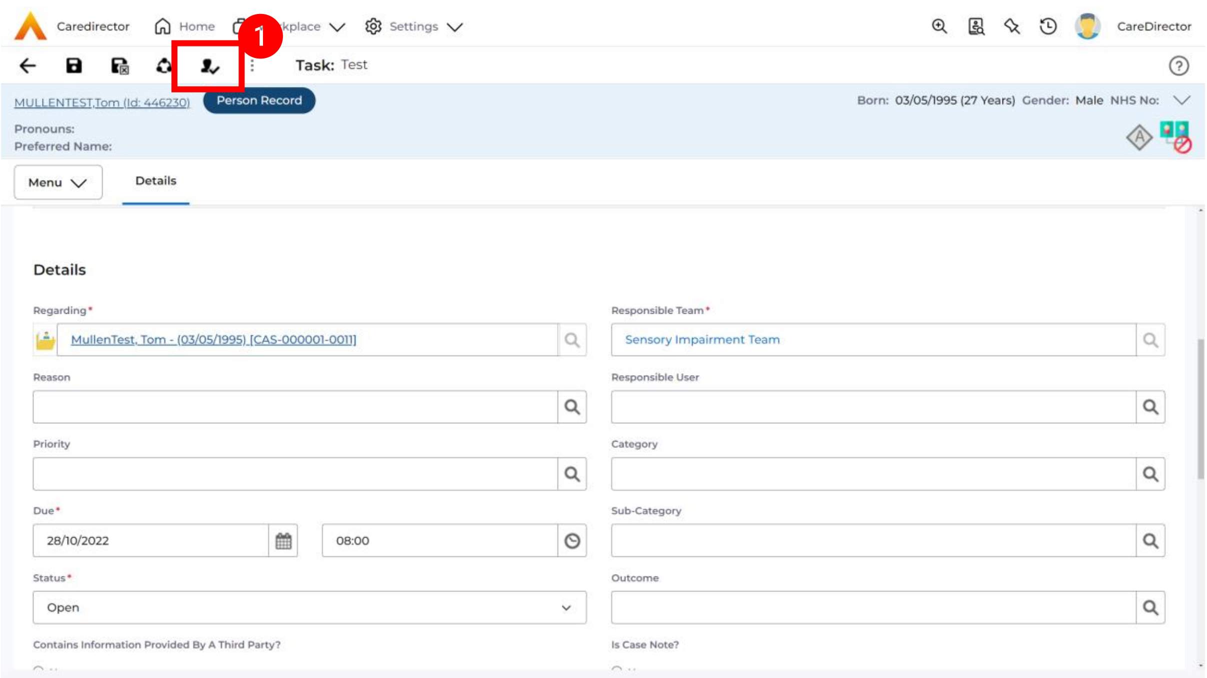


How to Allocate an existing Activity to another team

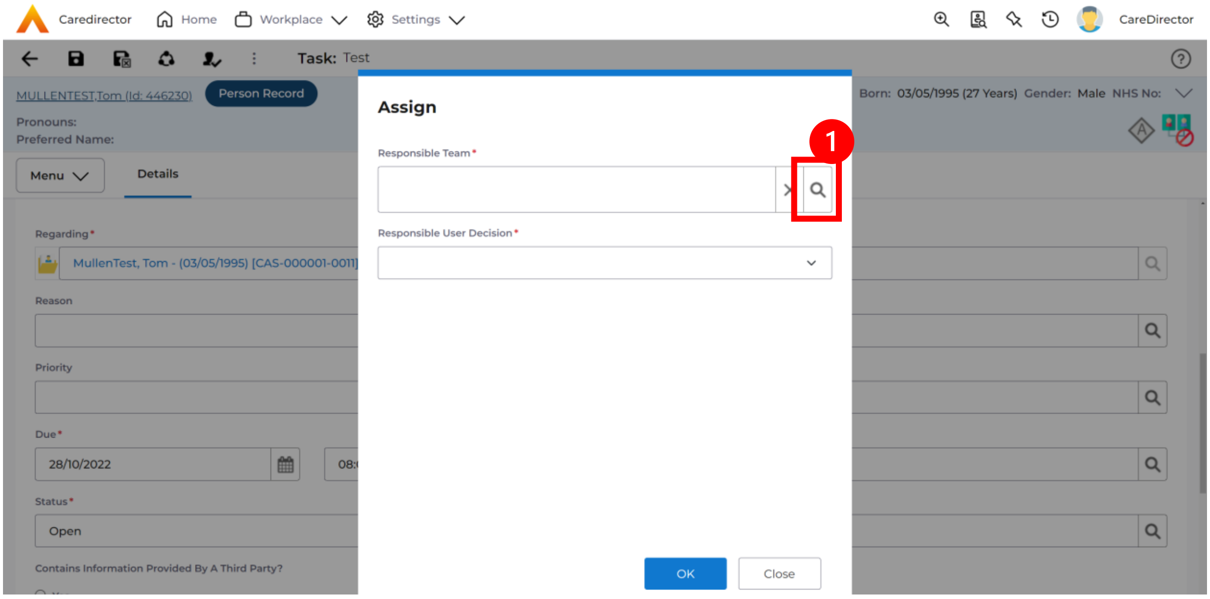
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup function**. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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



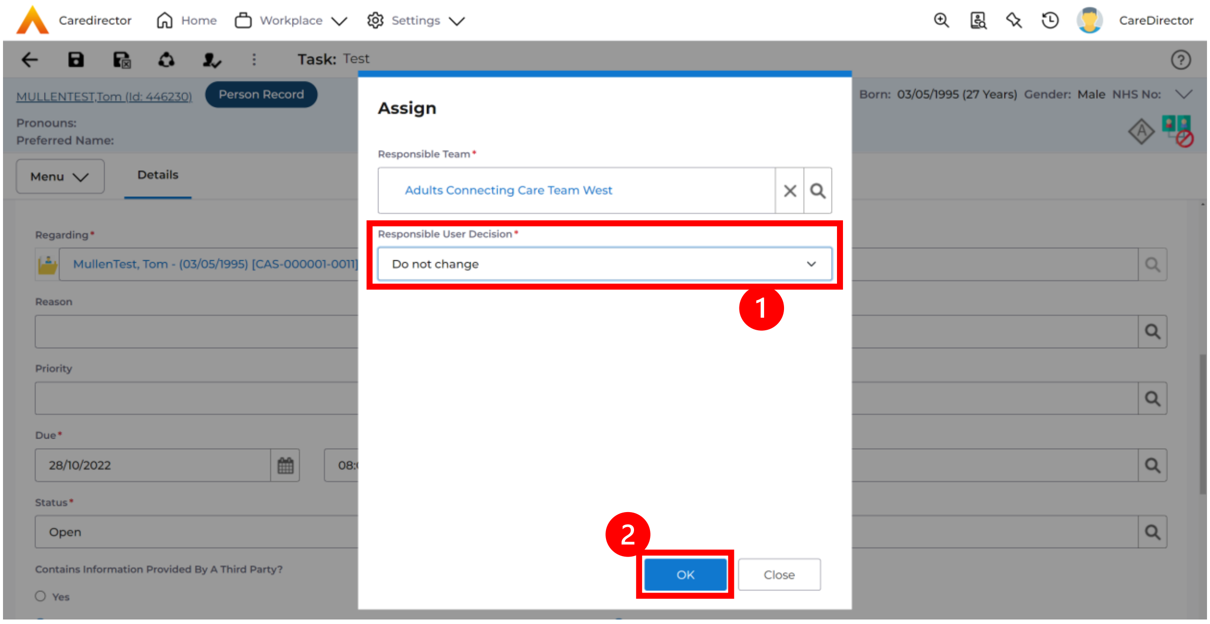
2. Next select **Assign this record to another team** from the toolbar.



3. This will open a new window. Choose the **Responsible Team** that this **Activity** will be sent to using the **Lookup function**. Remember to use **Look in** once selected to pick from other teams.



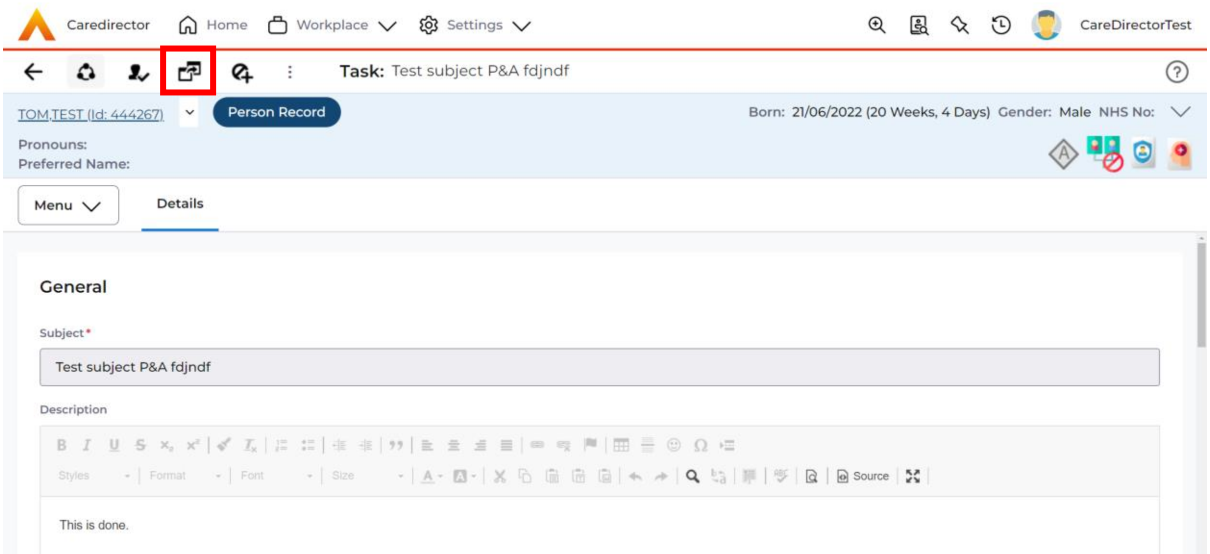
4. Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only.**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



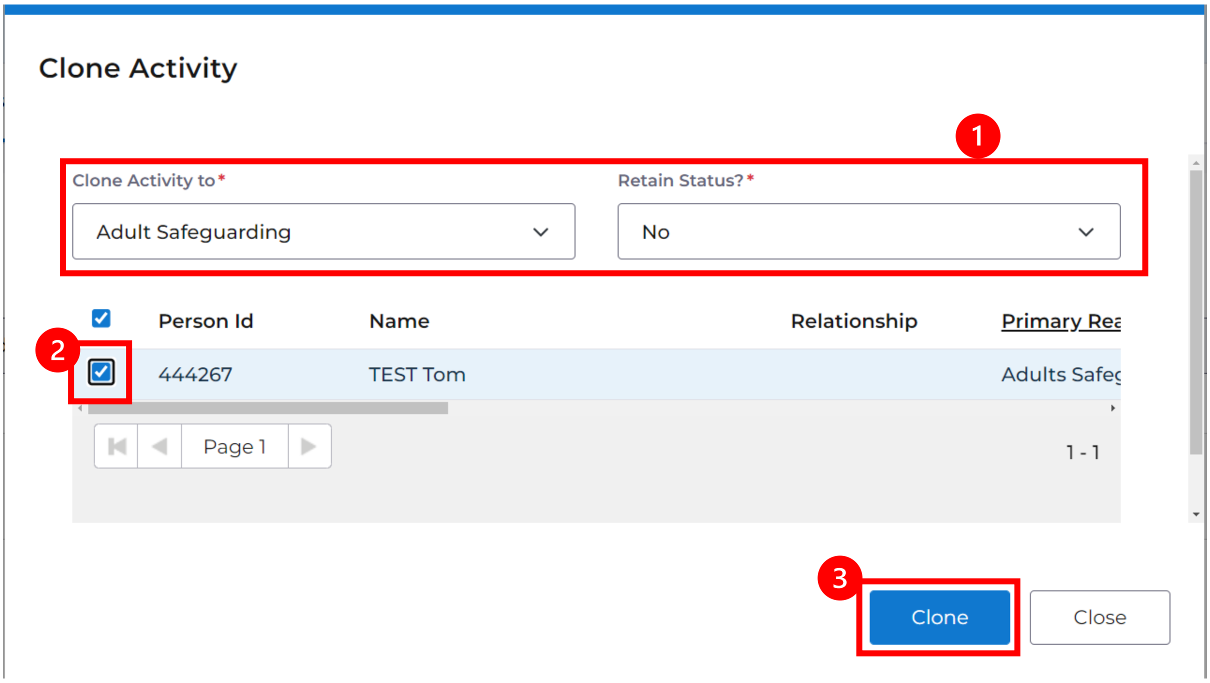
5. The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

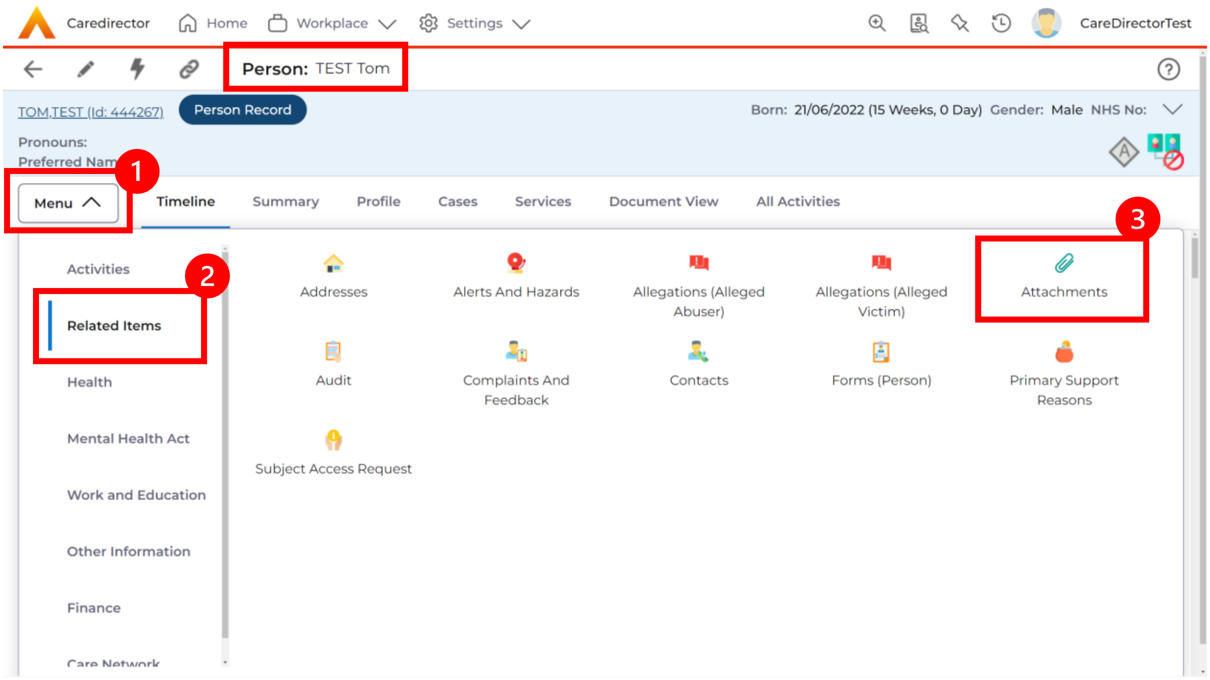


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that is has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

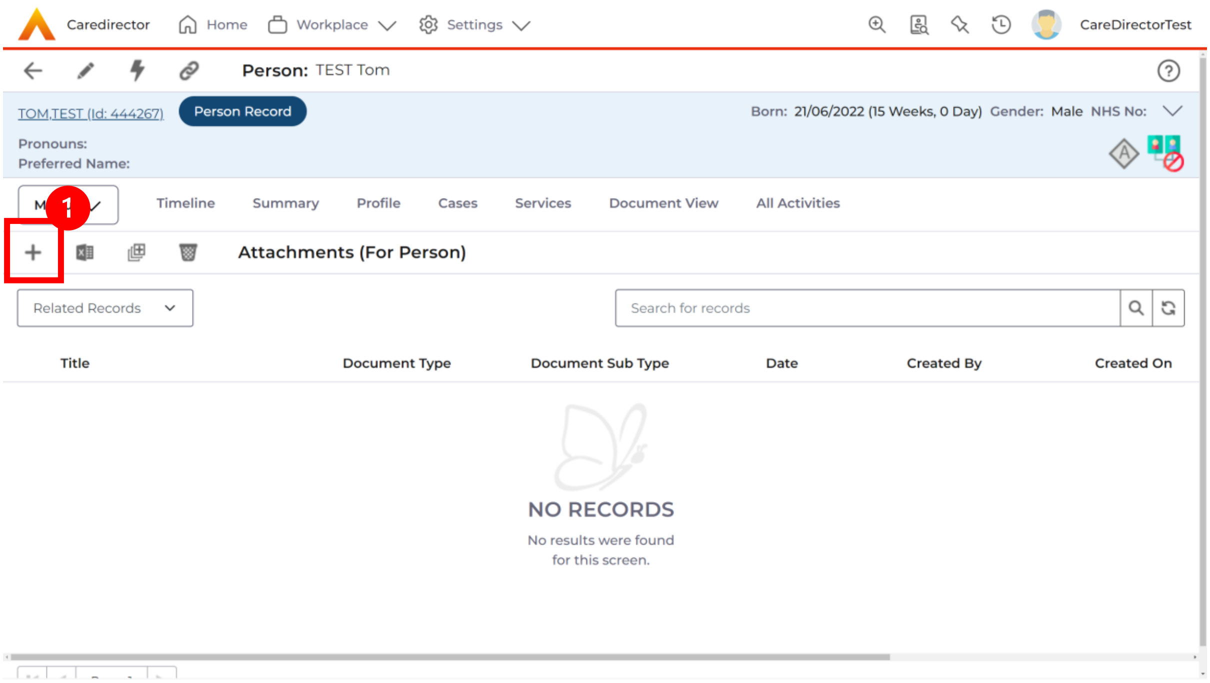


How to upload Attachments

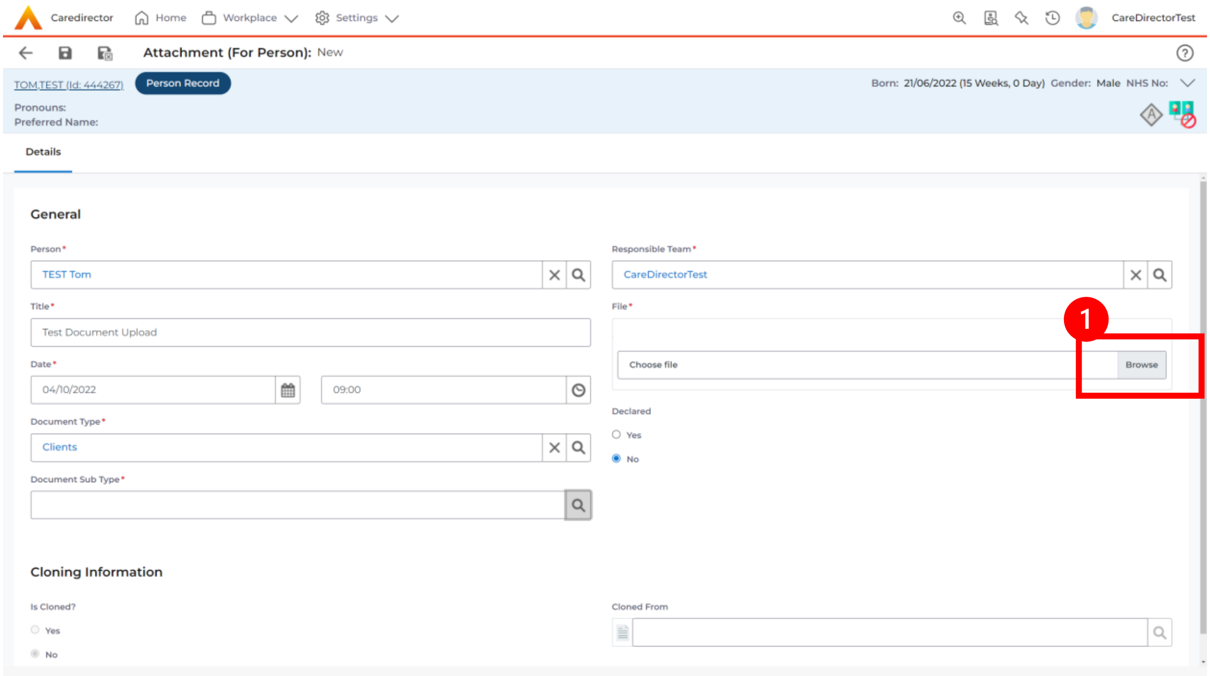
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



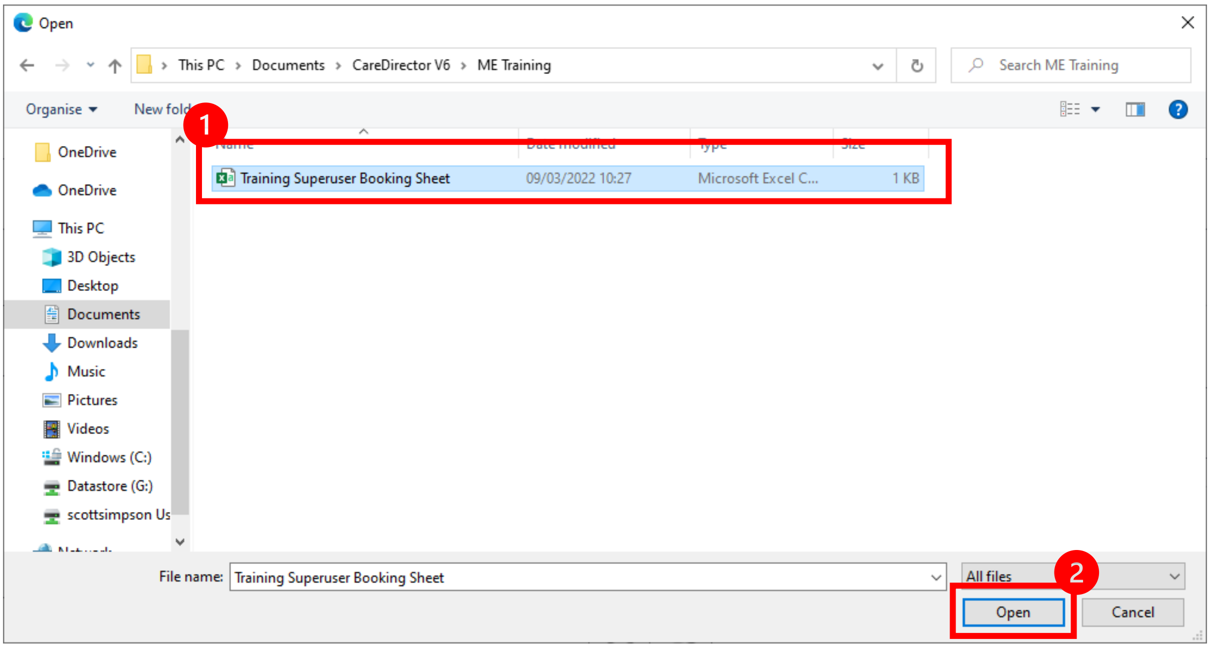
2. When opened, select the **Create New Record** from the toolbar.



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



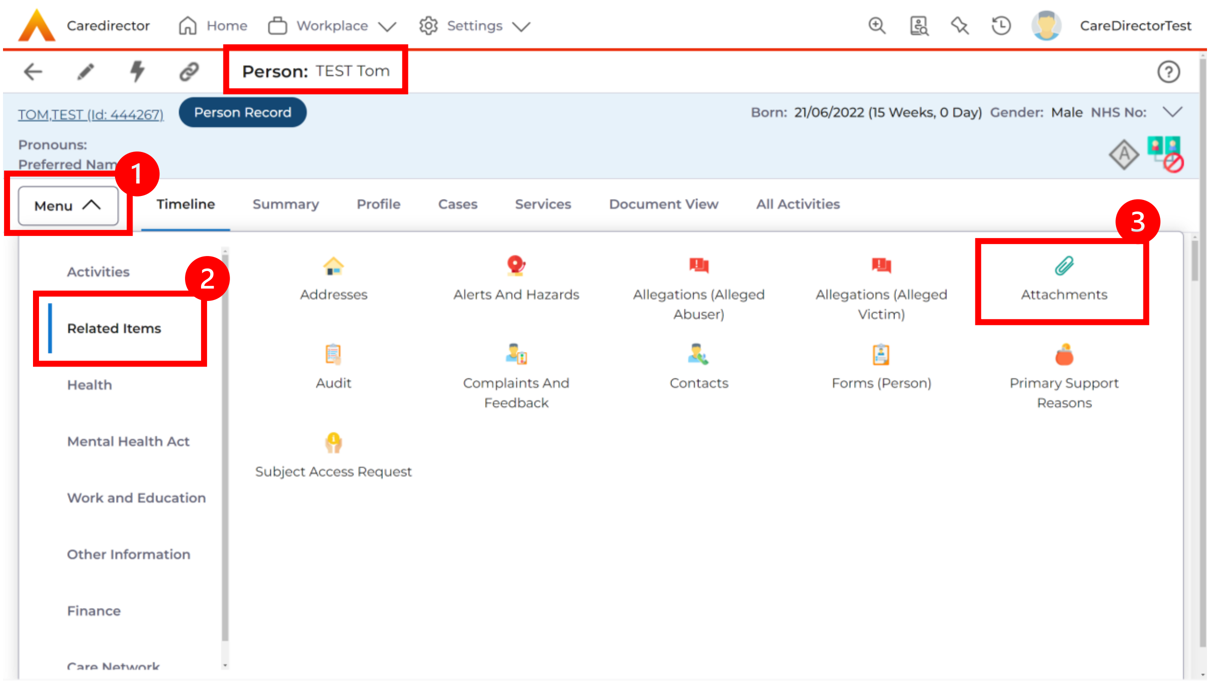
4. Select a **File** from your computer/ SharePoint and select **Open.**



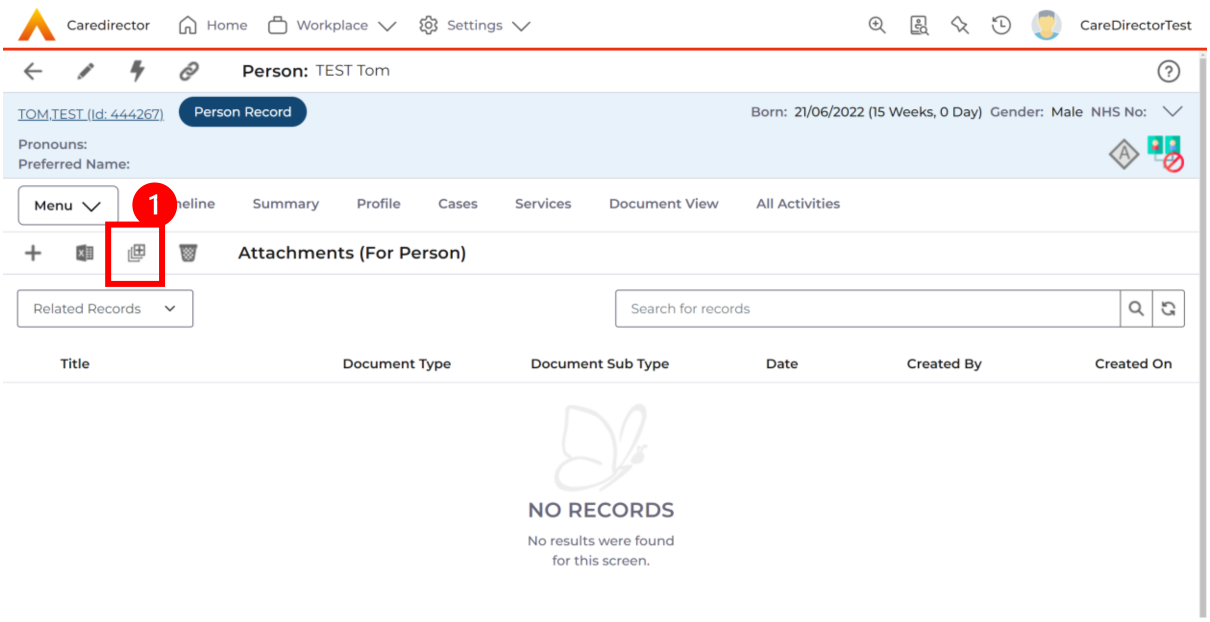
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

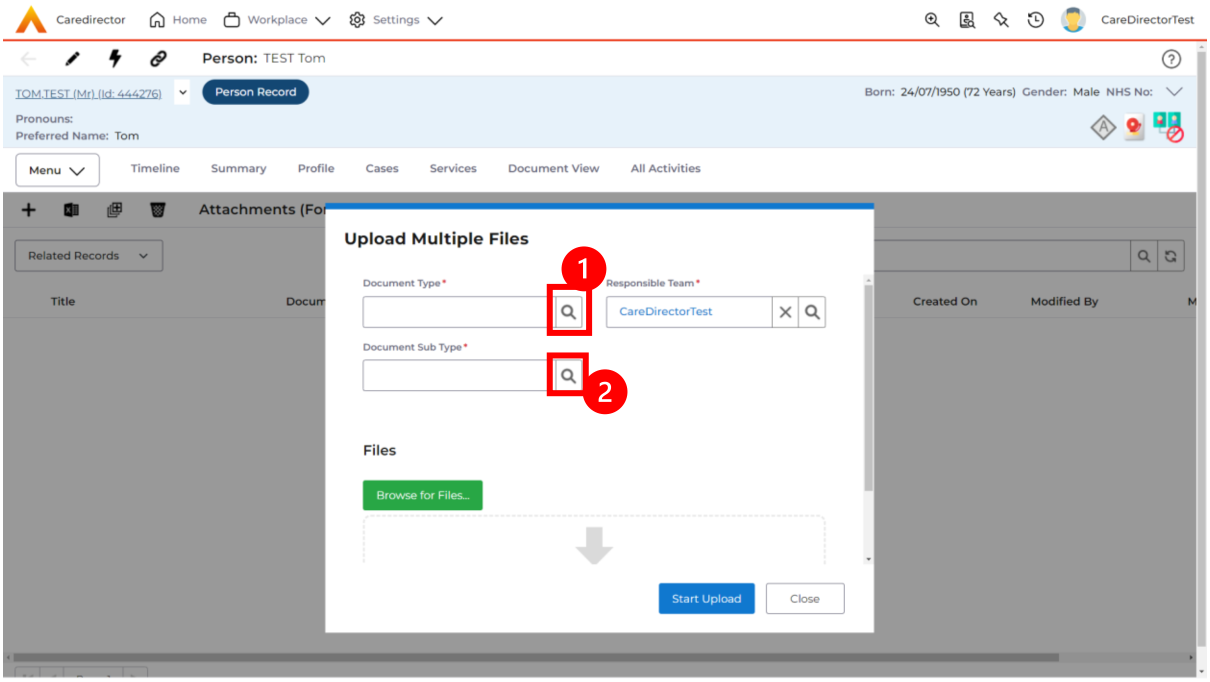
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records.** Open the **Menu**, **Related Items** and then select **Attachments**.



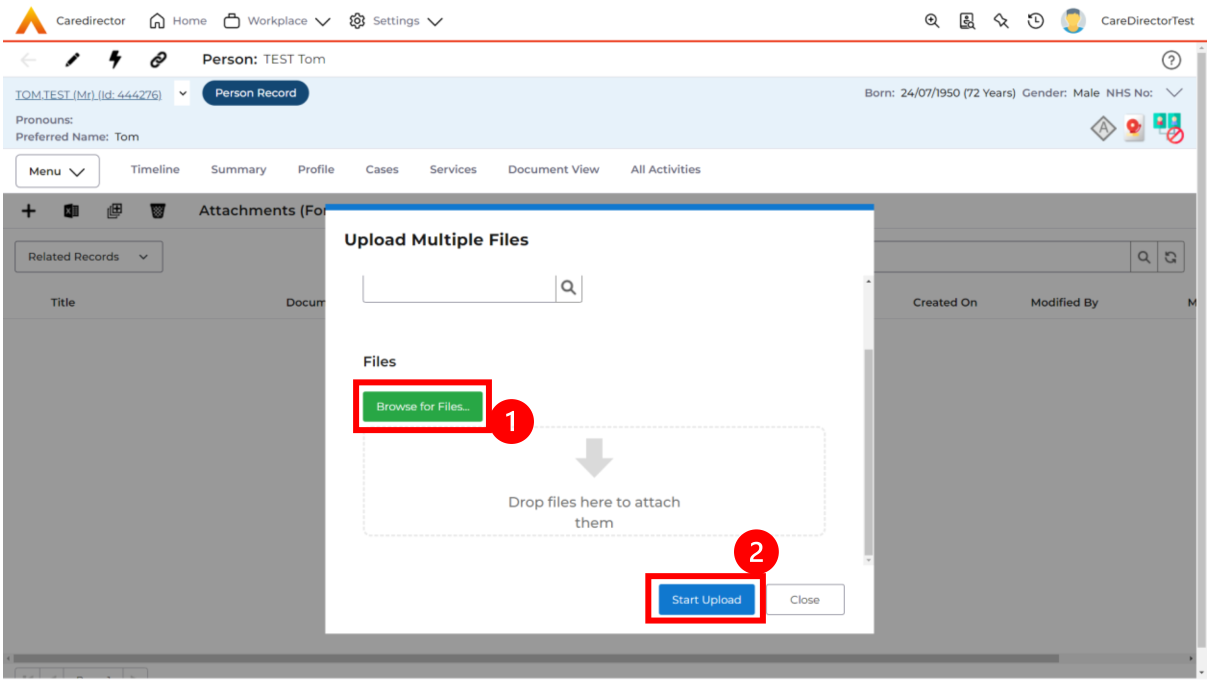
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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



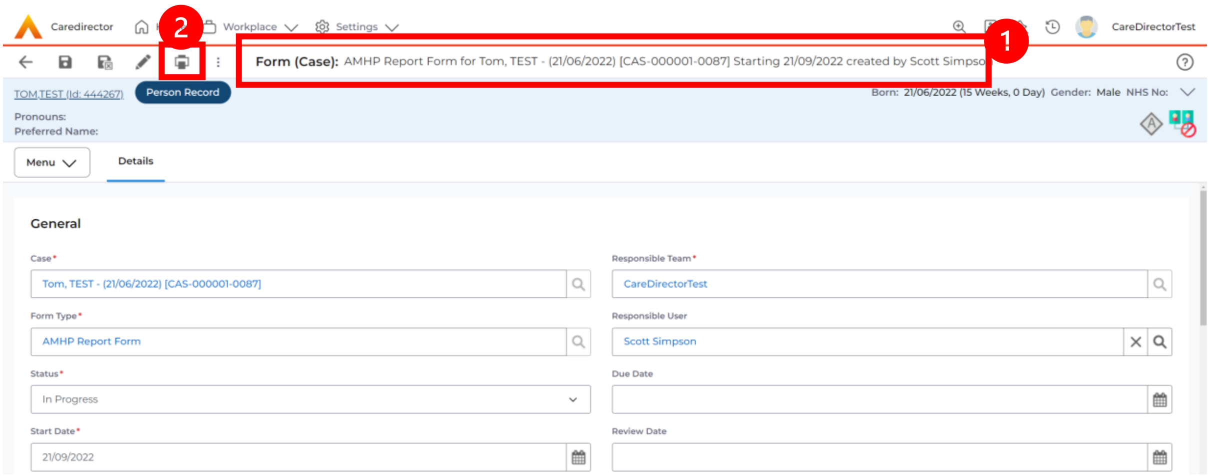
4. If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When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



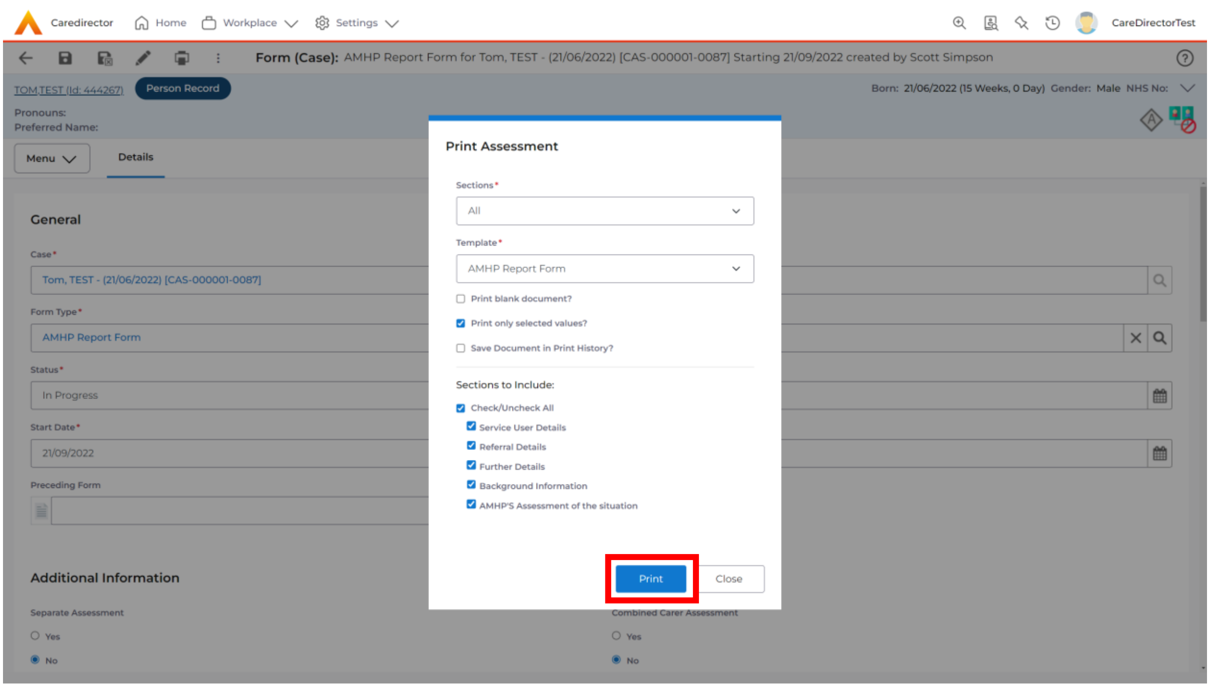
How to Print

1. Printing in CareDirector will work the same everywhere on the system as it requires the **Print** function from the toolbar to be selected.

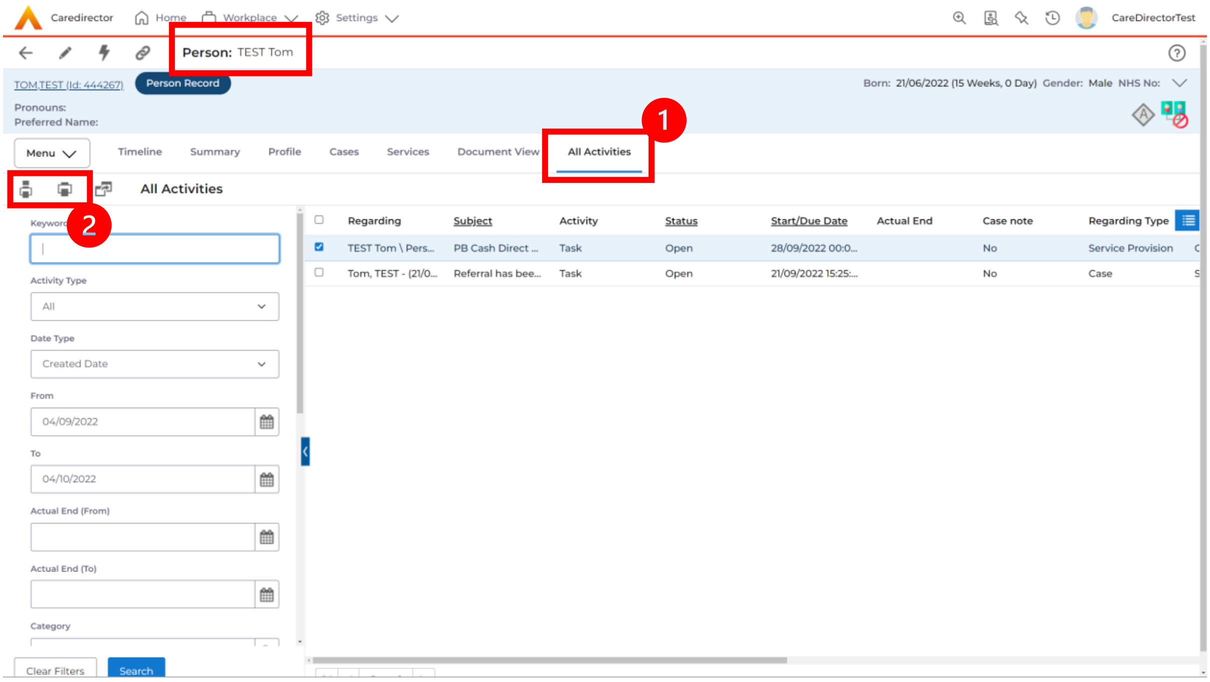
2. Locate the **Activity/ Attachment/ Form** that is required to be printed. Then select the **Print** function from the toolbar.



3. This will open a new window. Select the parameters you want and select **Print.**

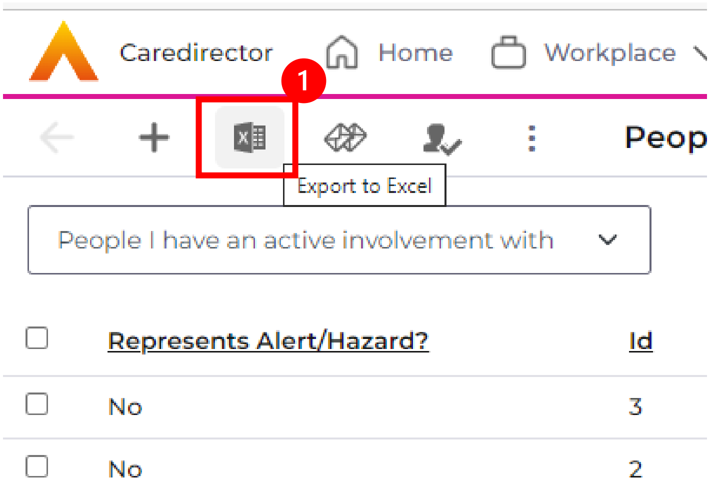


4. Please note: Activities will need to be printed from the **Person Record** under the tab **All Activities**

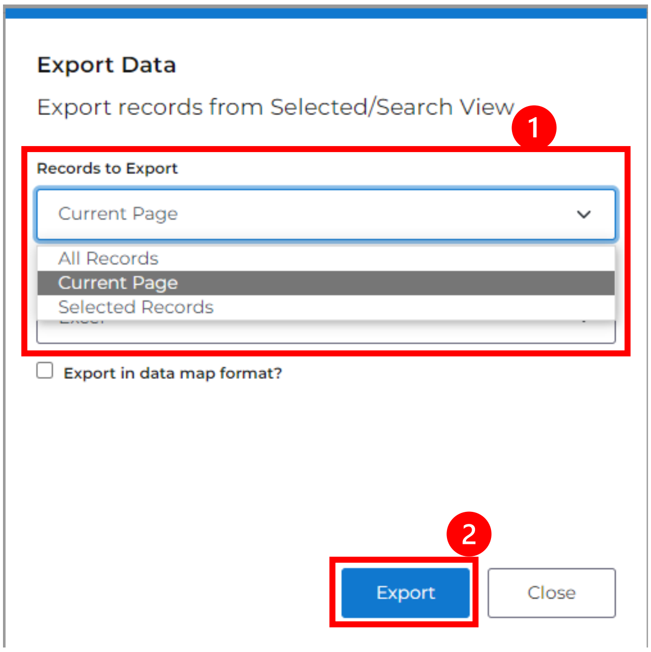


Exporting to Excel

1. Available on the toolbar.



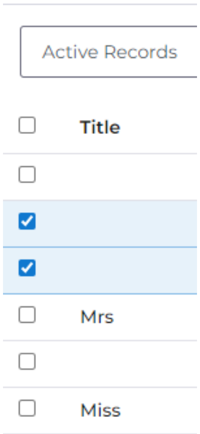
2. Use the **Records to Export** field to choose from **All Records** or **Current Page** or **Selected Records**.



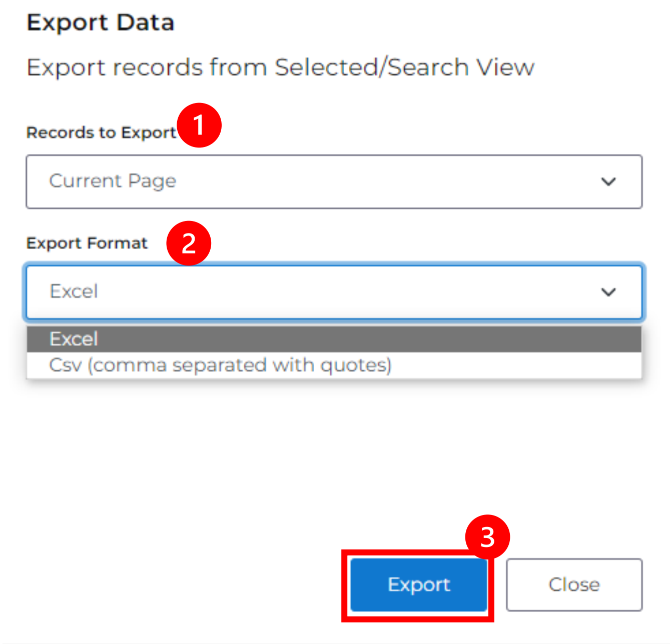
3. **All Records** will export all records on the summary screen or record chosen.

4. **Current Page** will export all available records on the page chosen.

5. **Selected Records** are records that have been selected by the checkbox. Then only those selected will be exported.



6. Select the **Excel Format** desired.

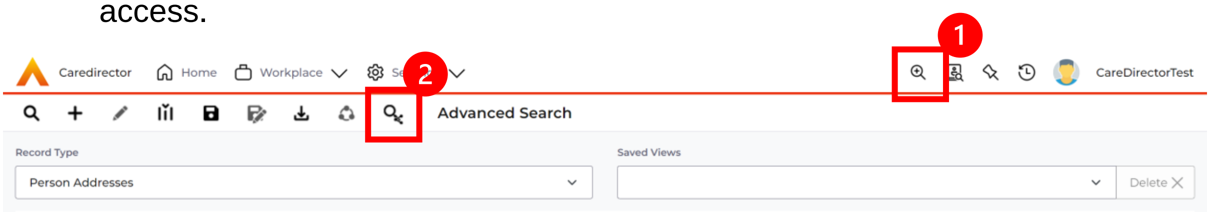


7. Select **Export** to export it to an excel sheet.

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.

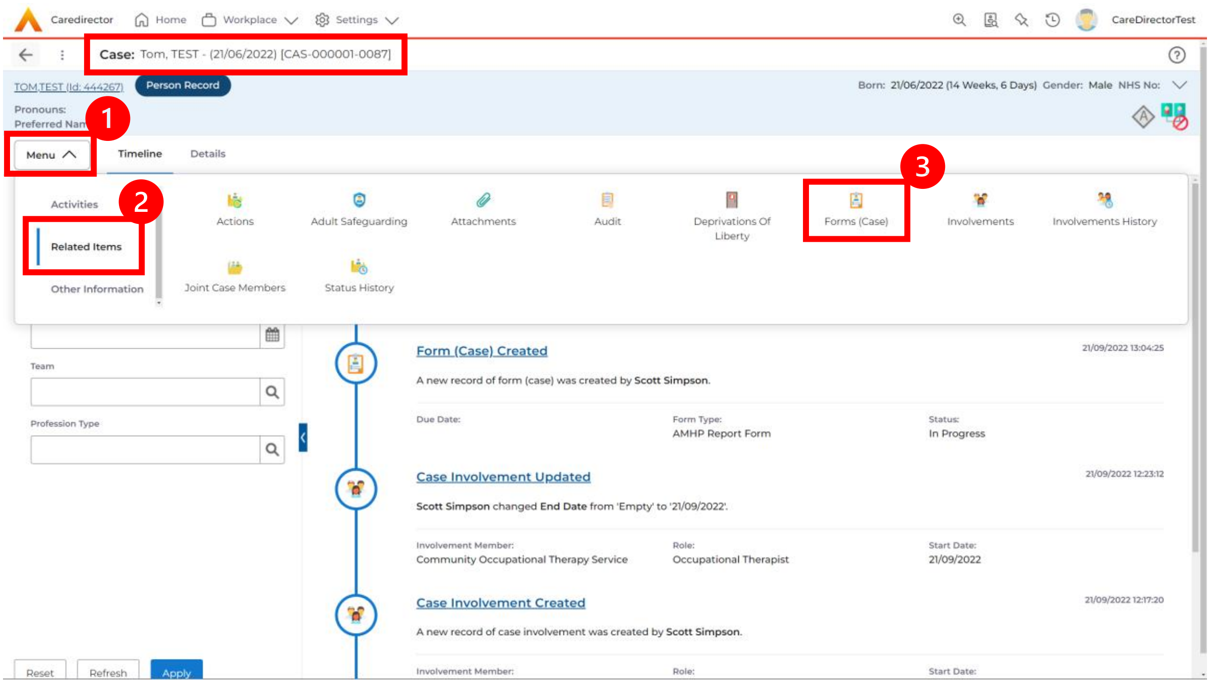
2. Select the **Advanced Search** icon. Then first select the **Advanced Searches Shared with Me** to view what has already been shared with you as quick access.



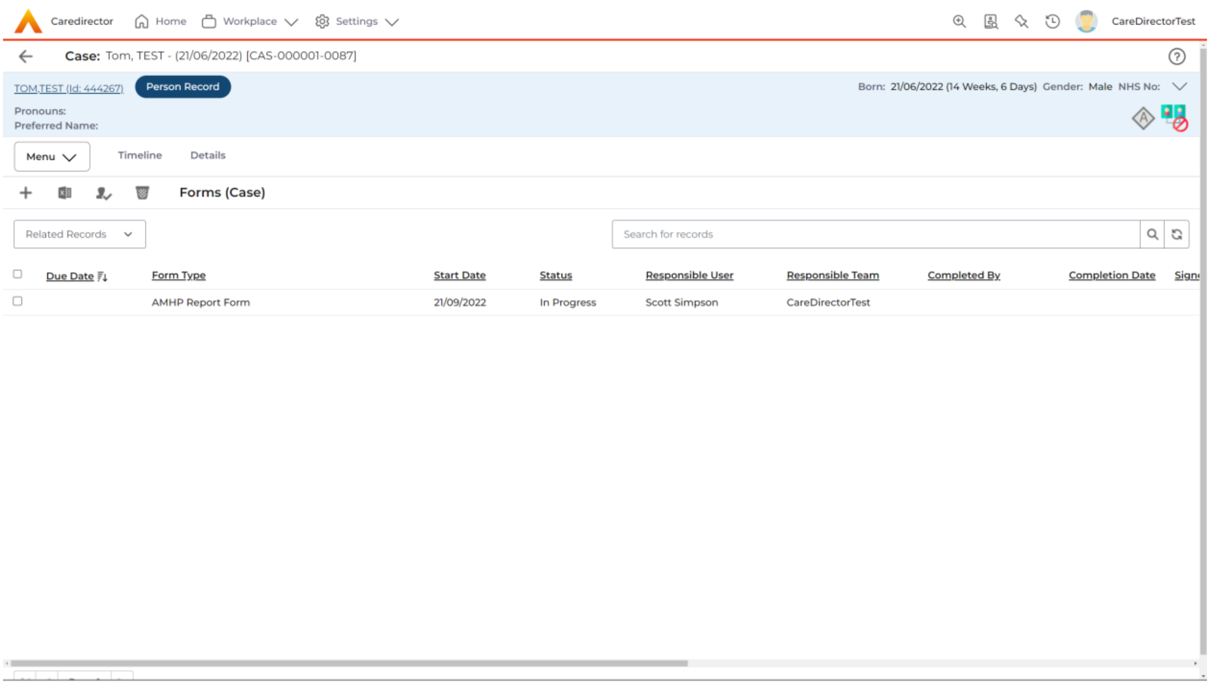
3. Select from the list to automatically search for the pre-built **advanced search.** If nothing is shared with you independently, tell your superuser.

How to find a Form (Case)

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

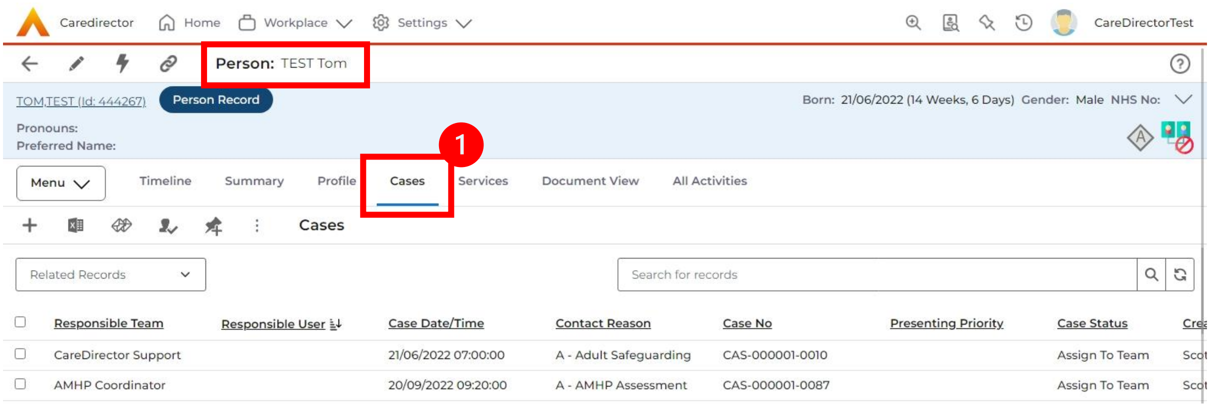


2. Select the relevant for **Form** to open.

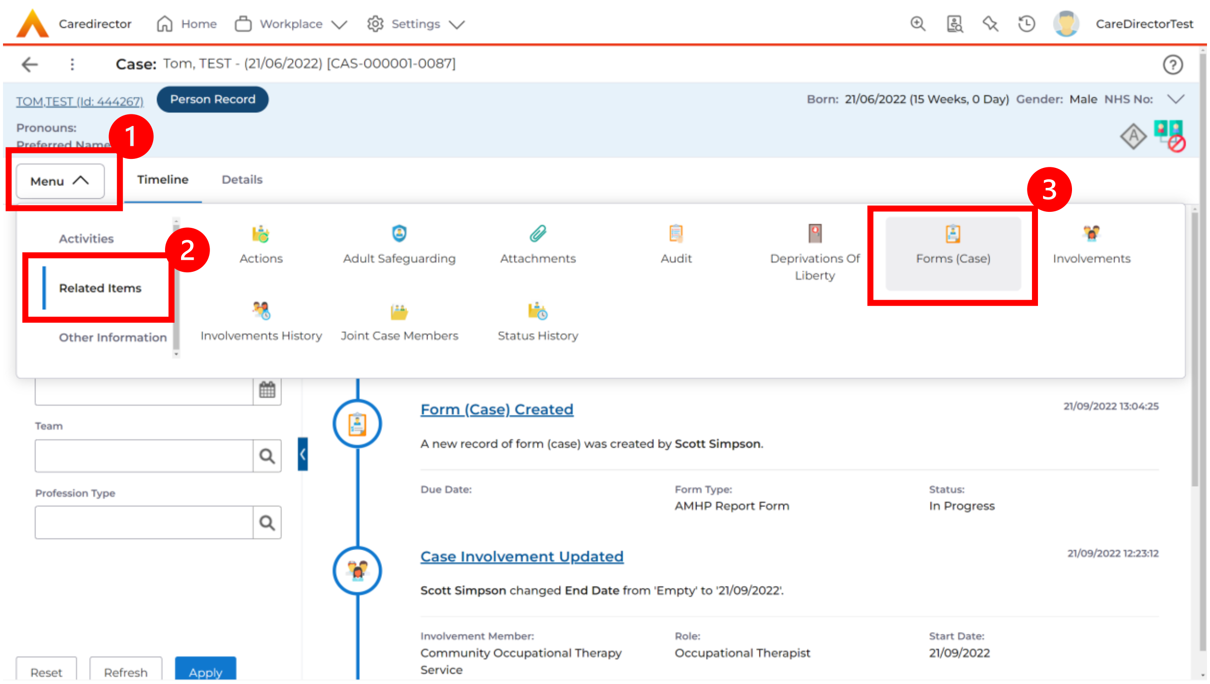


How to add a Form

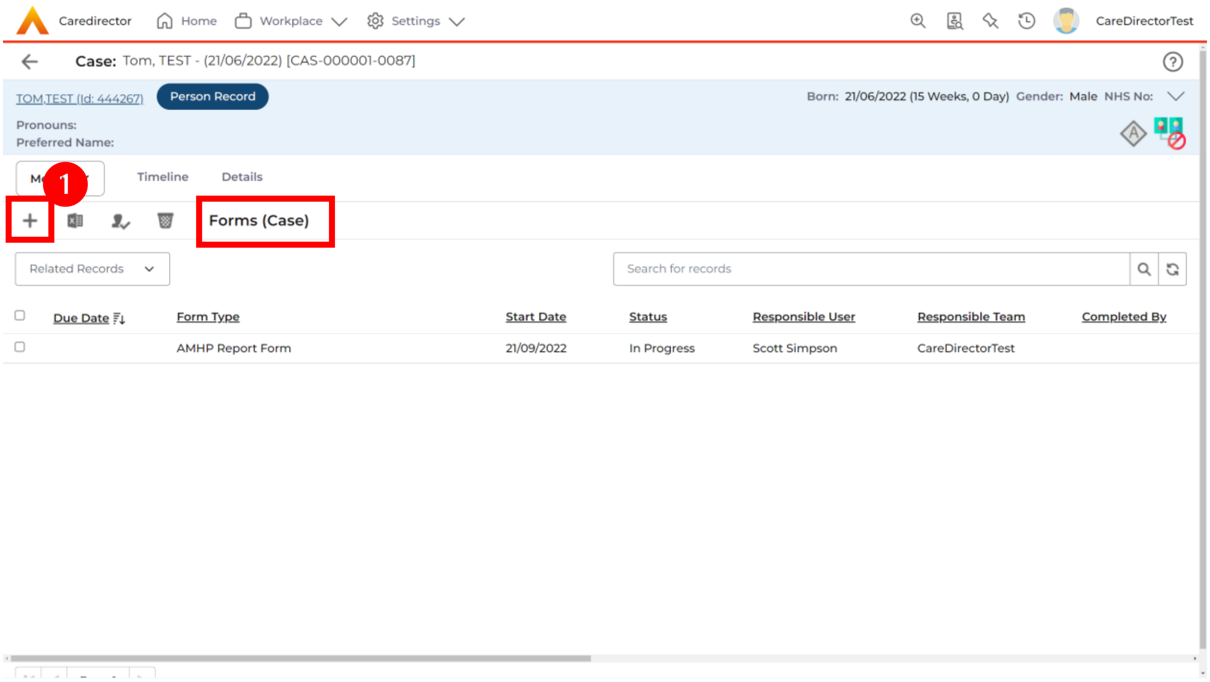
1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**. When found, select it to open the **Case Record**.



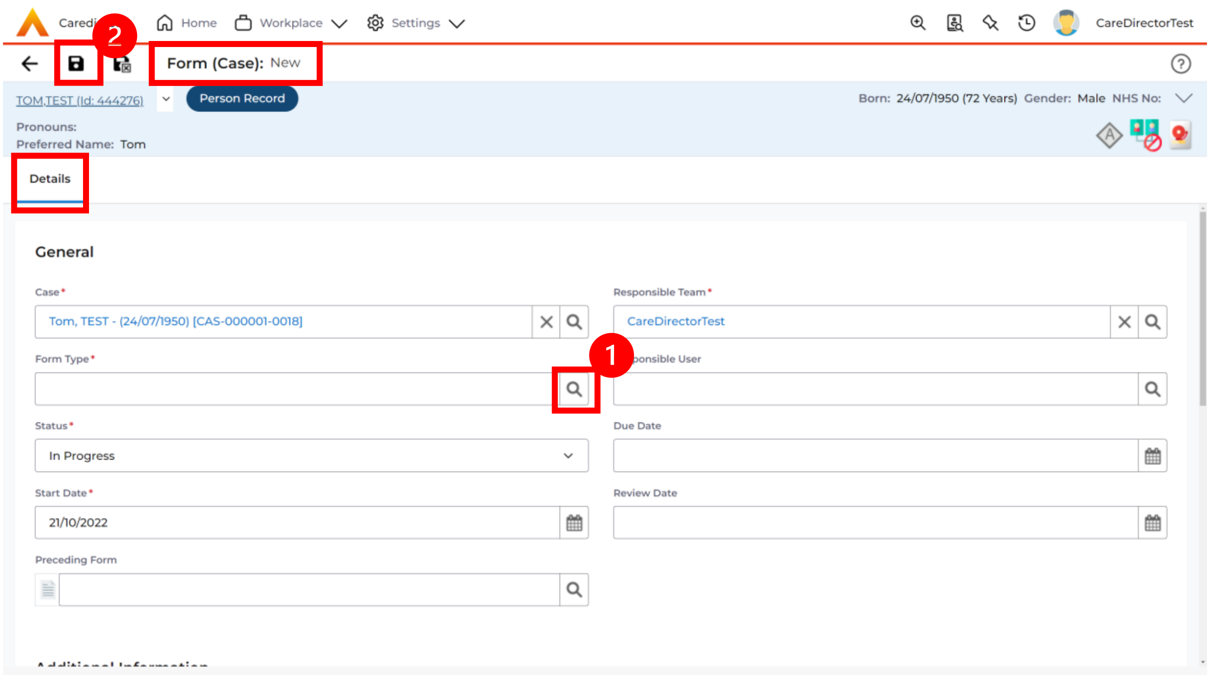
2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case).**



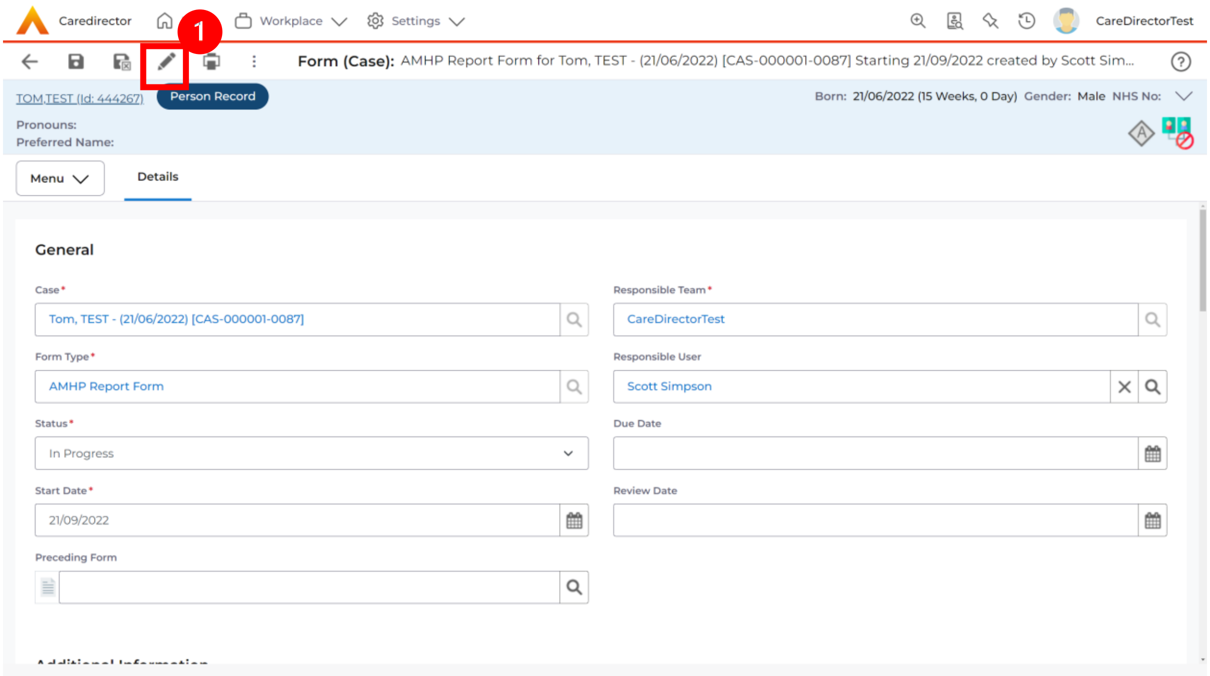
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



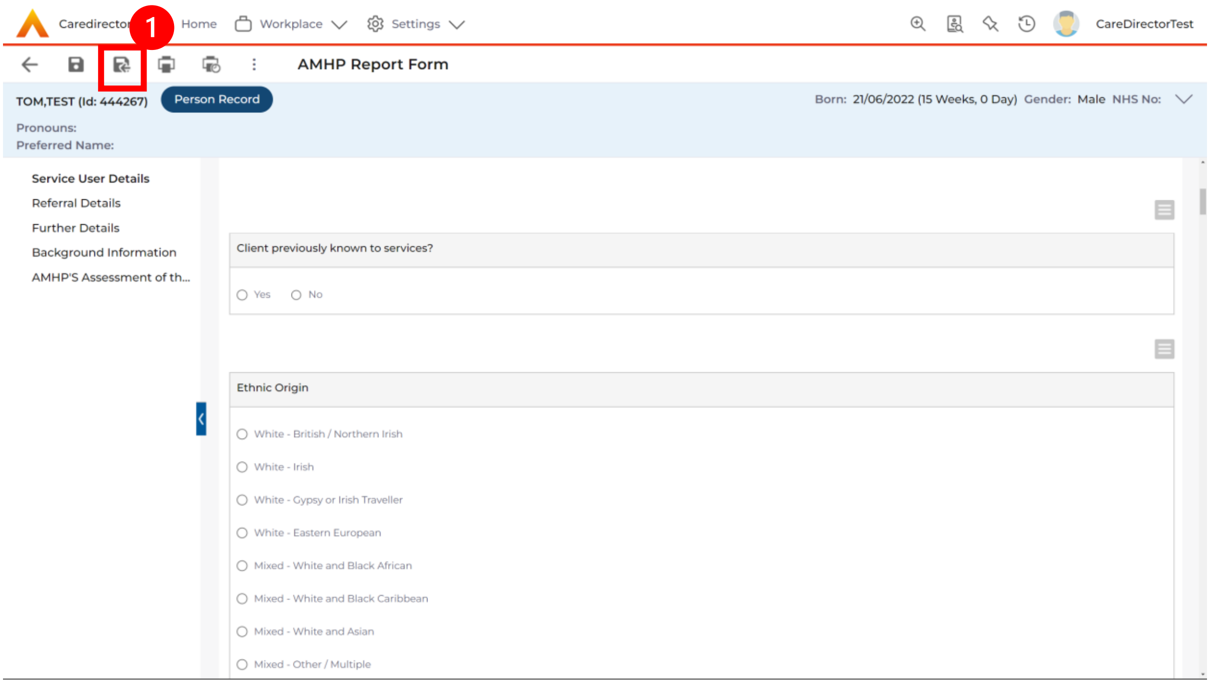
4. Once inside the **Details.** This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type.** When finished, select **Save.**



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

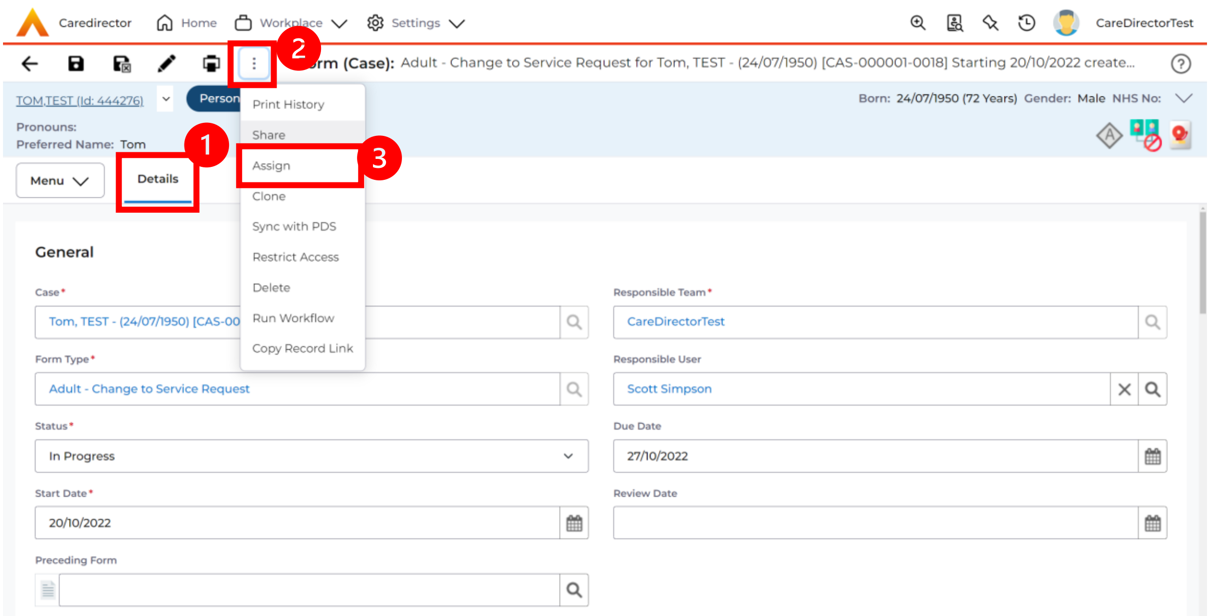


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

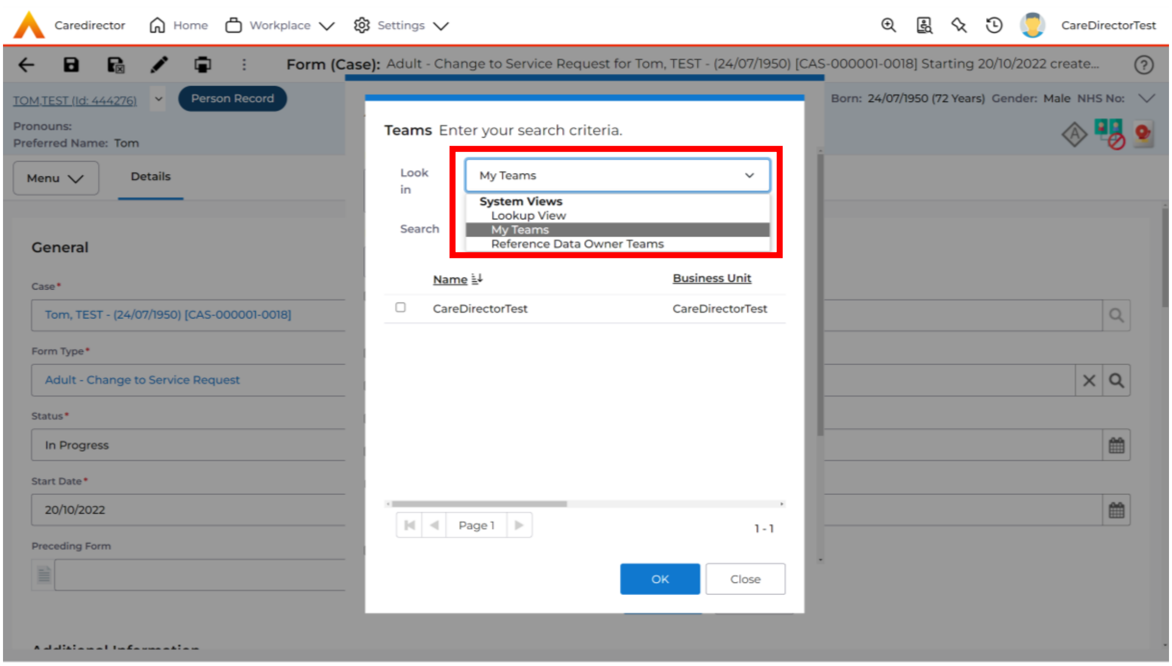


How to Allocate a Form

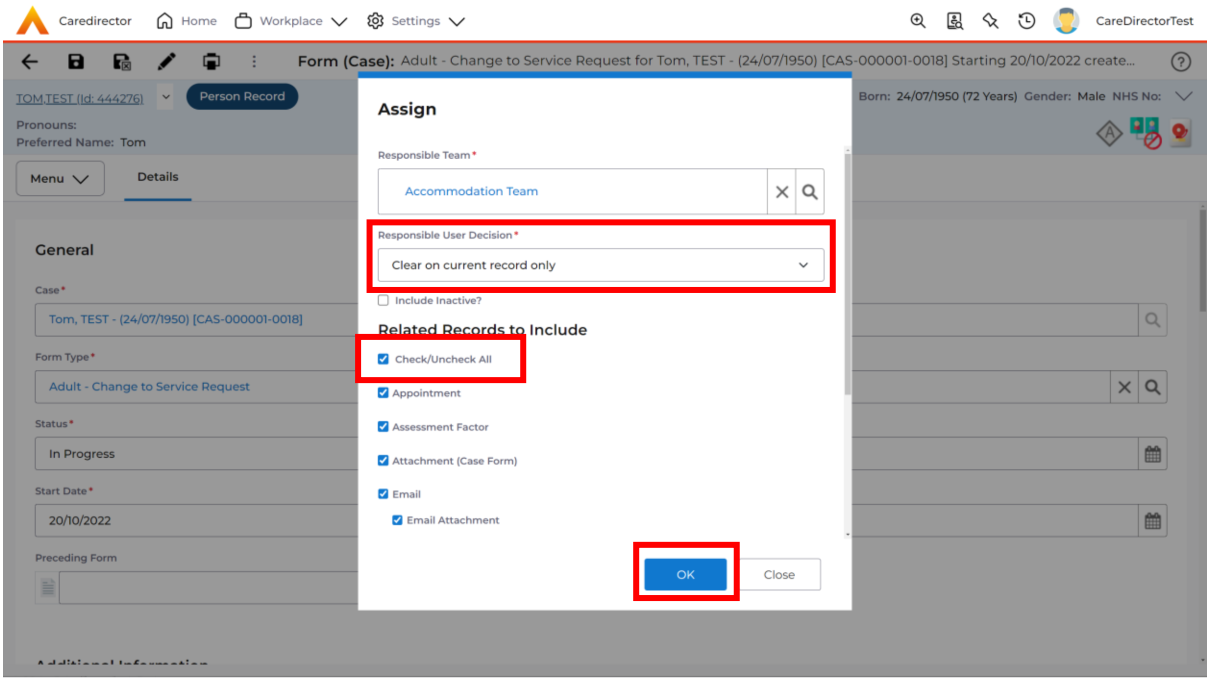
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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

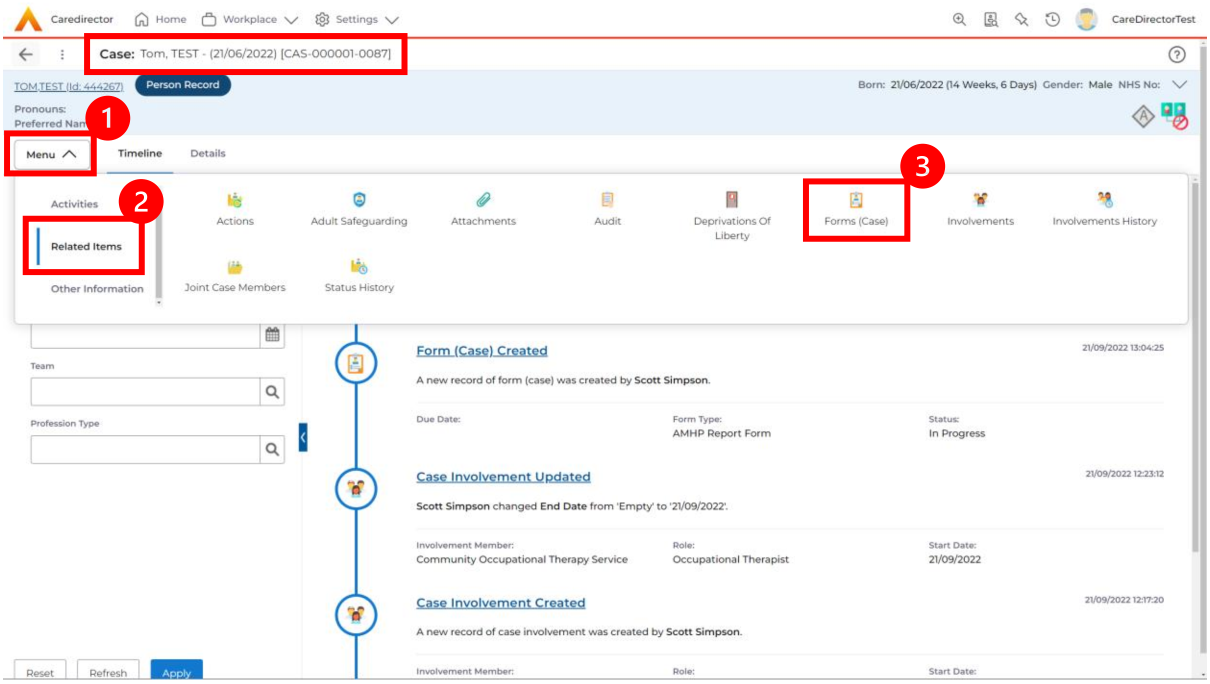


3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

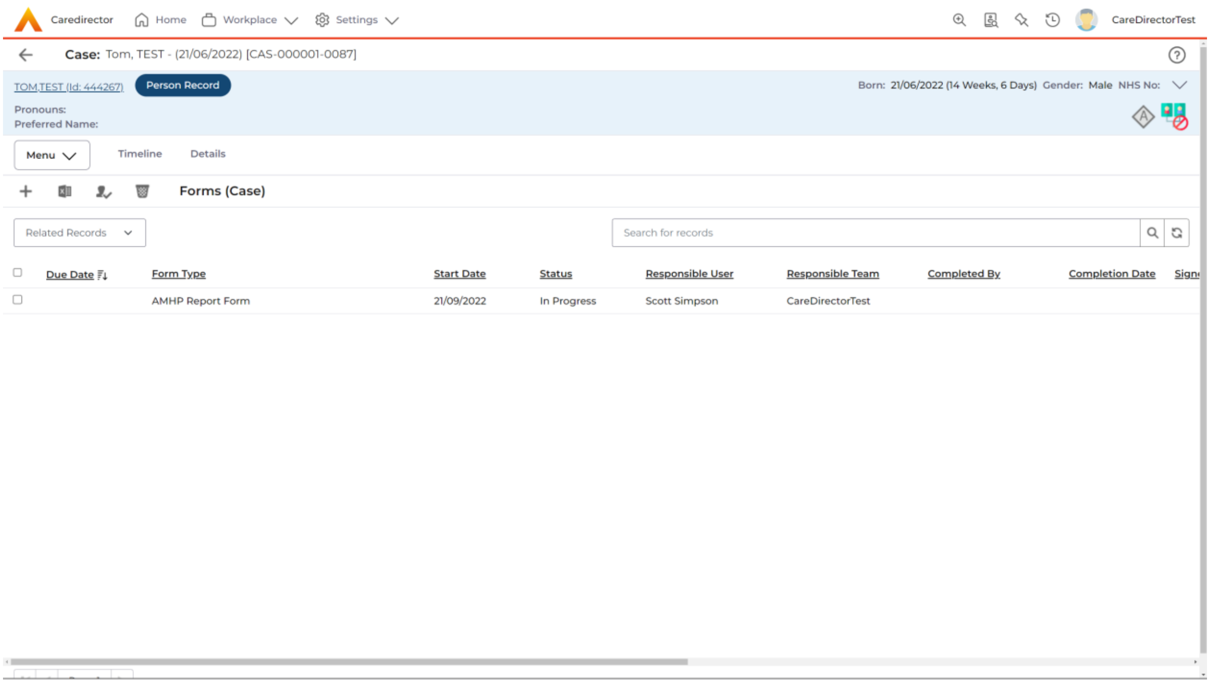


How to Clone a Form

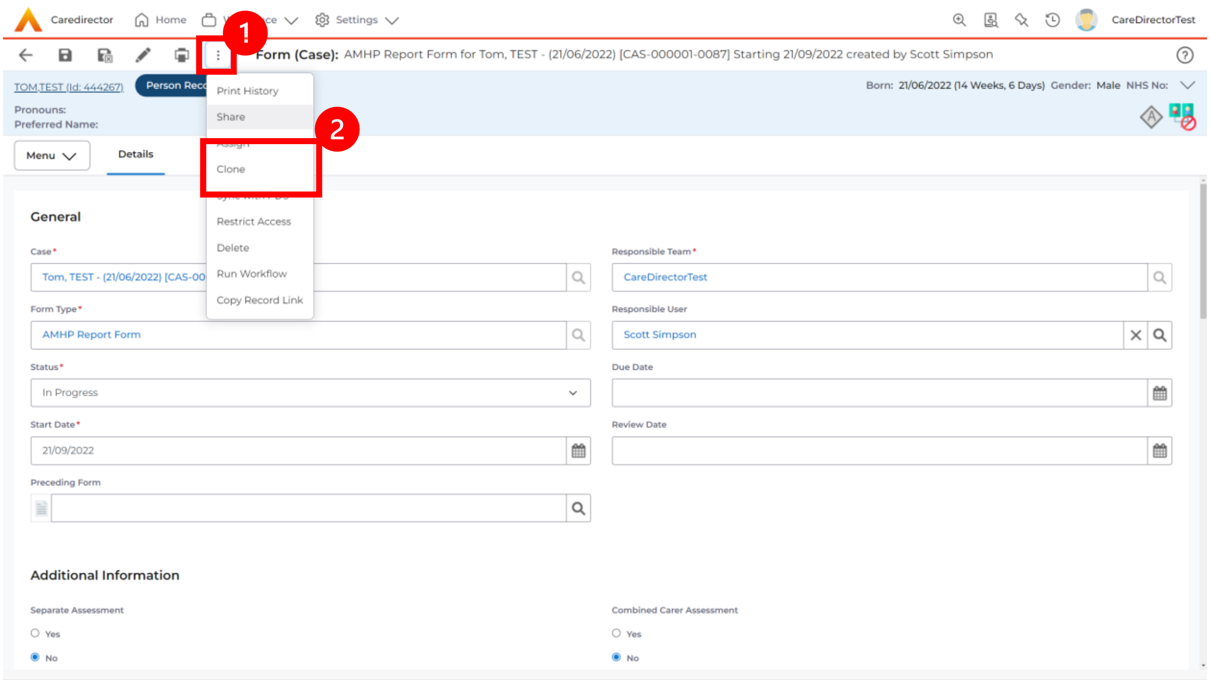
1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case).**



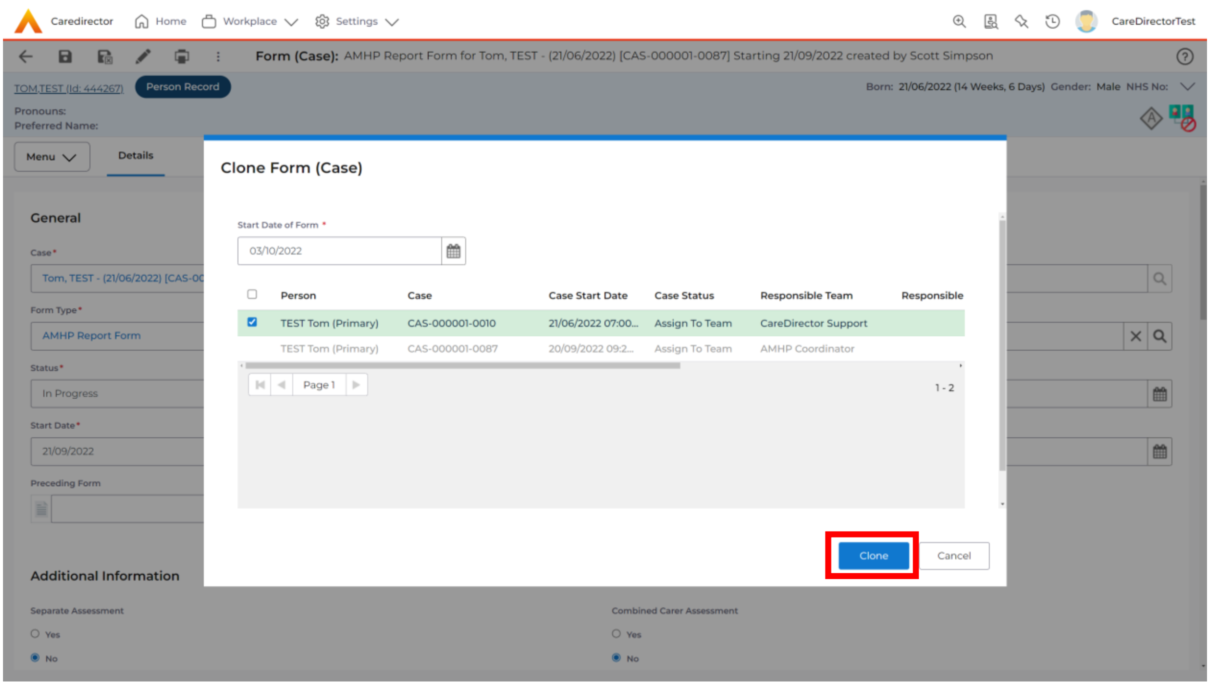
2. Select the relevant for **Form** to open.



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

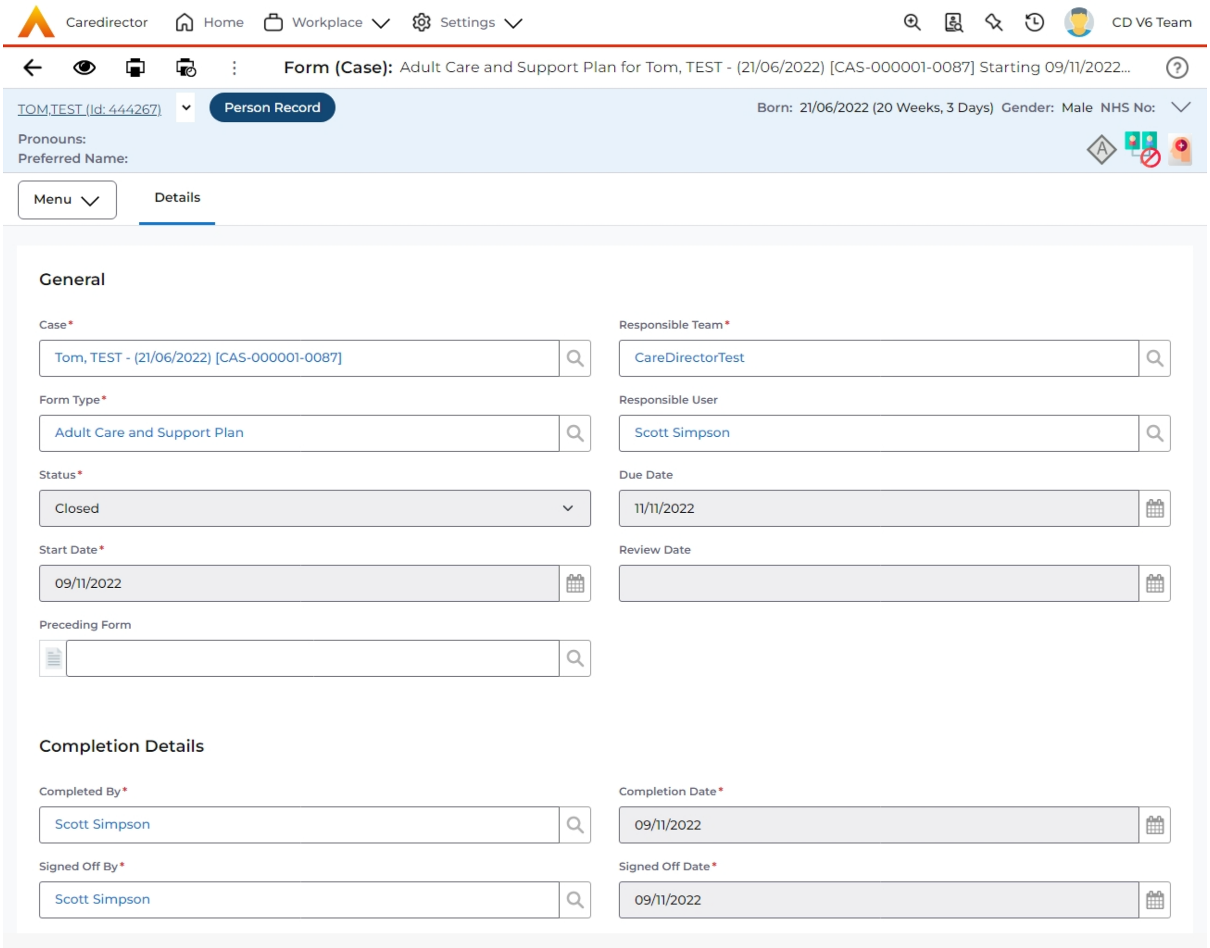


4. It will open a new window. Enter the **Start Date of Form.** Select which **Case** you would like this **Form** to be **Cloned** to. When check boxed, select **Clone.**



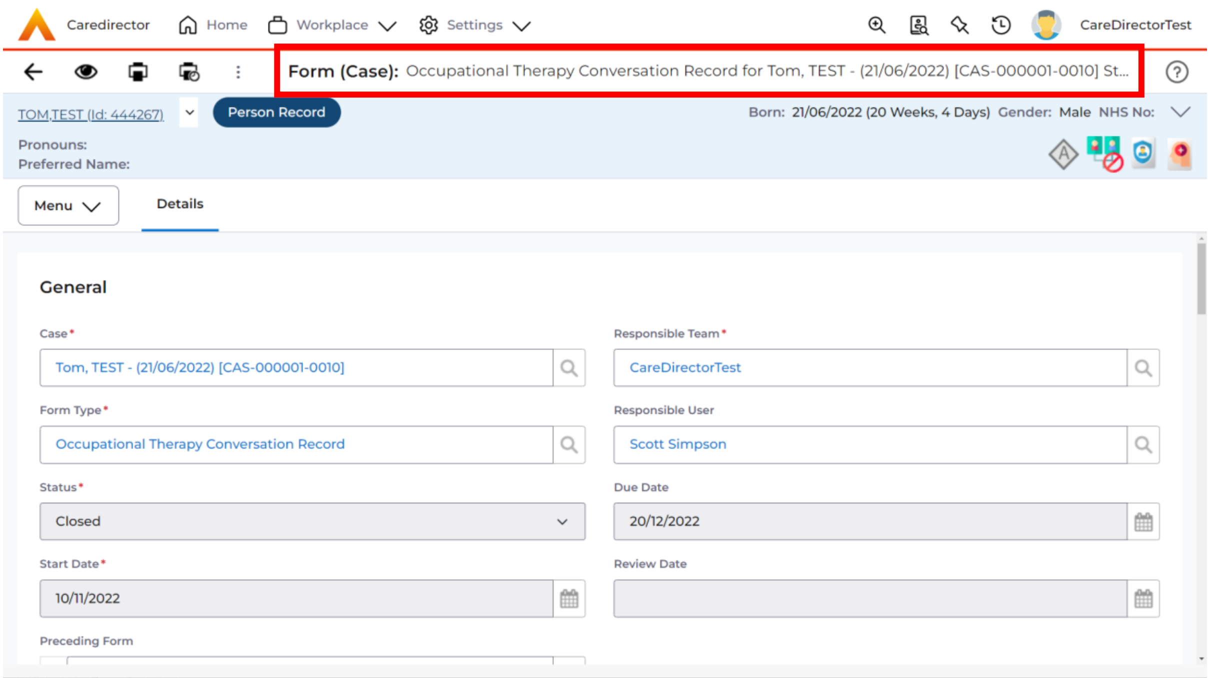
5. You do not need to **Save** this.

6. Please note: If you would like to **Clone** a **Form** that has another **Status** other than **closed**. You cannot have two **Forms** that are the same in the same **Case.** Therefore, if you want to **Clone** a **Form** to the same **Case** ensure that you **Closed** that **Form** first and get that signed off by the appropriate **System User**.

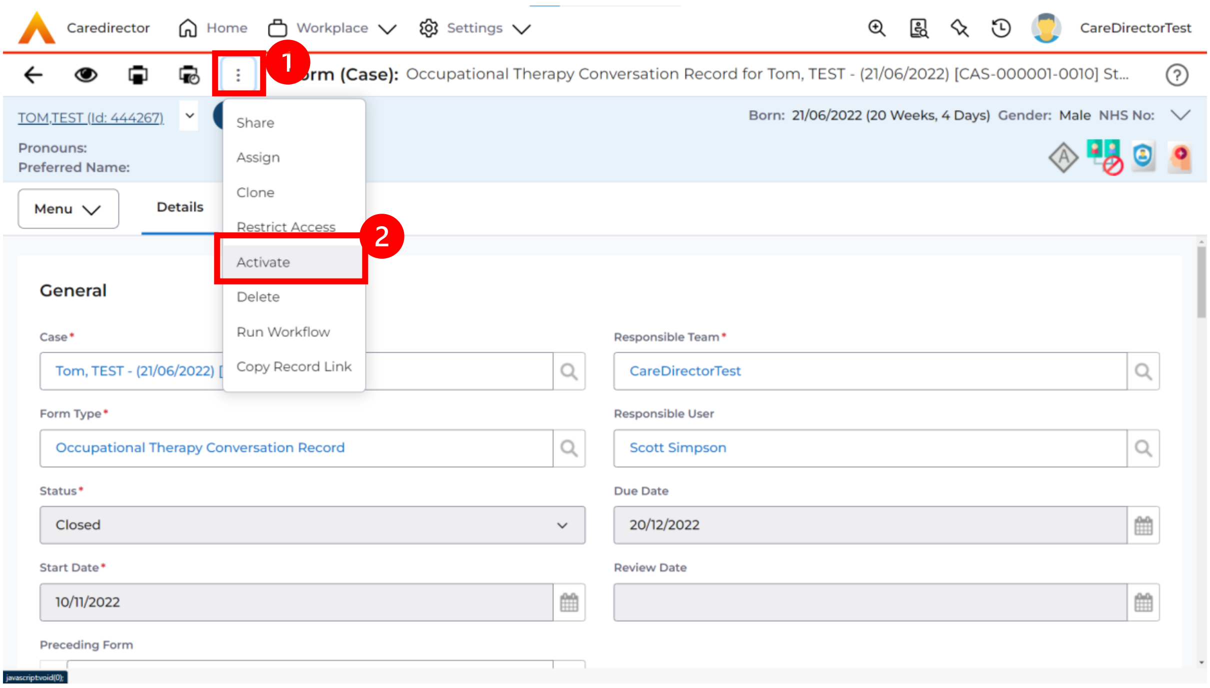


How to reactivate a Closed Form

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



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

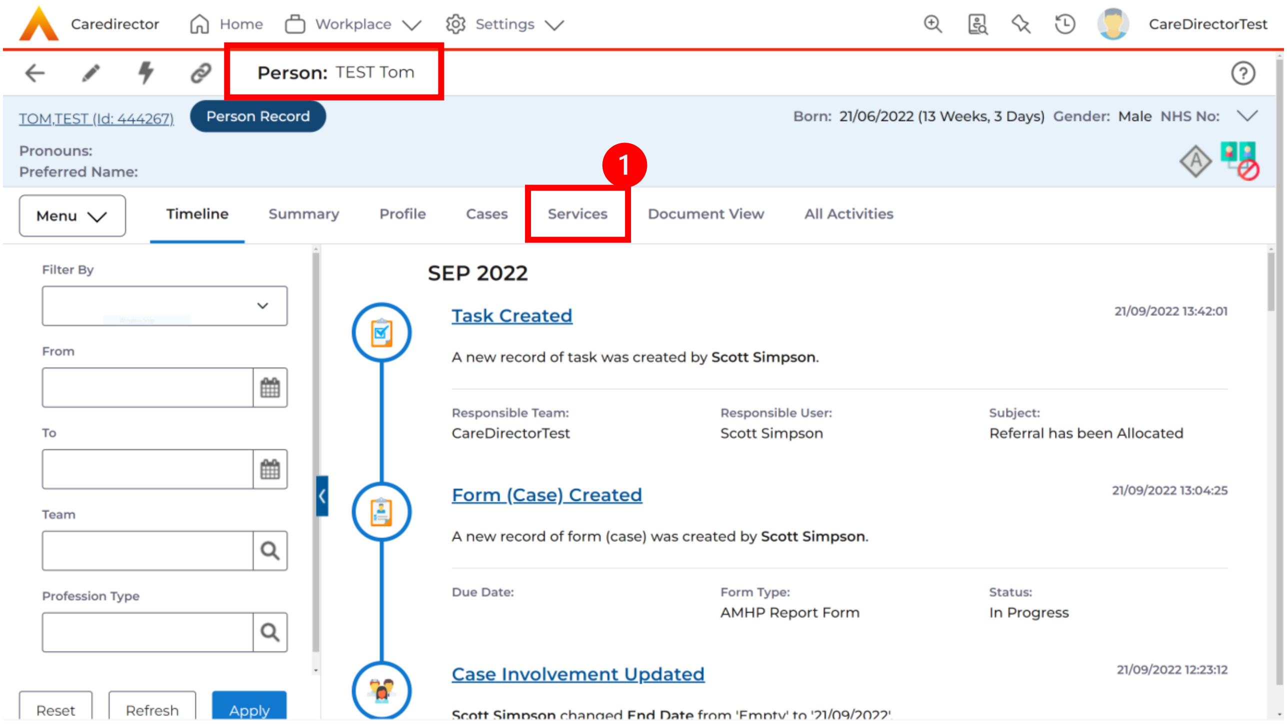


How to input Service Provisions

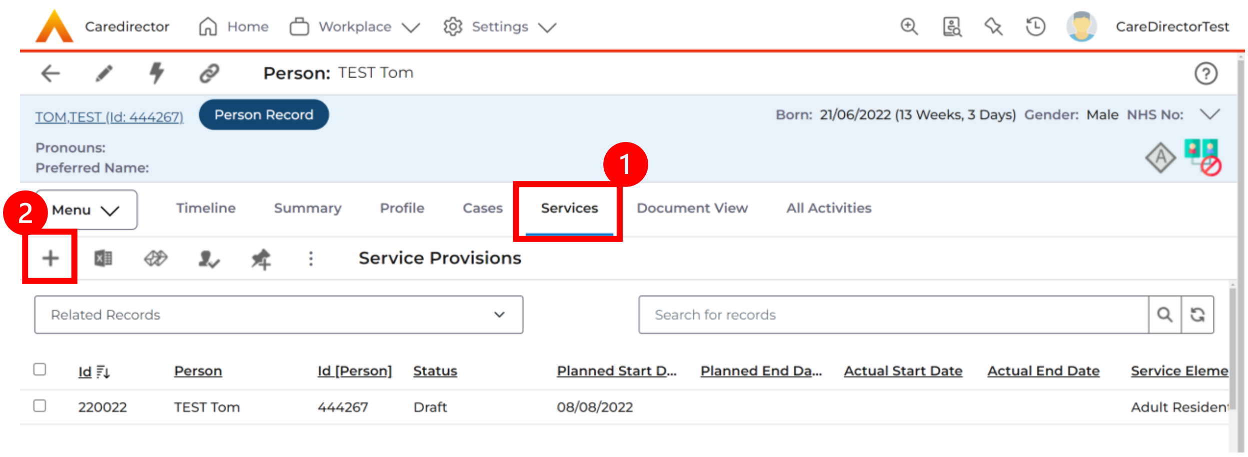
Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.

2. Select the relevant **Person Record** and select **Services**.



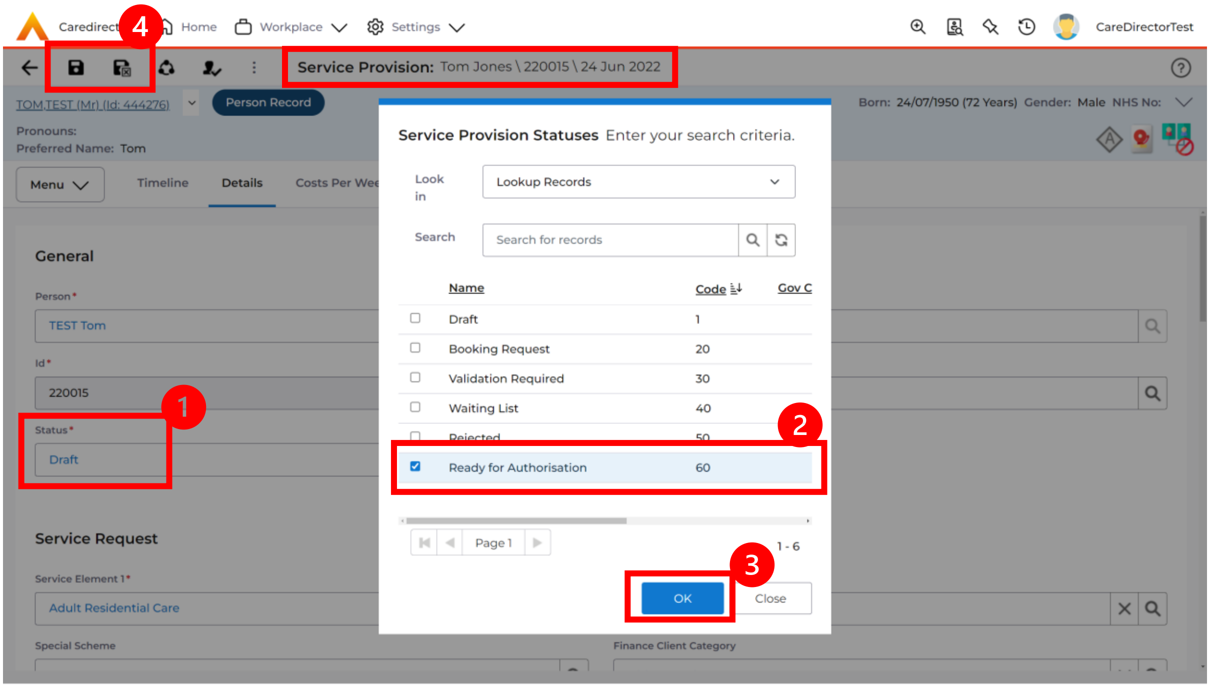
3. After selecting **Services,** if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



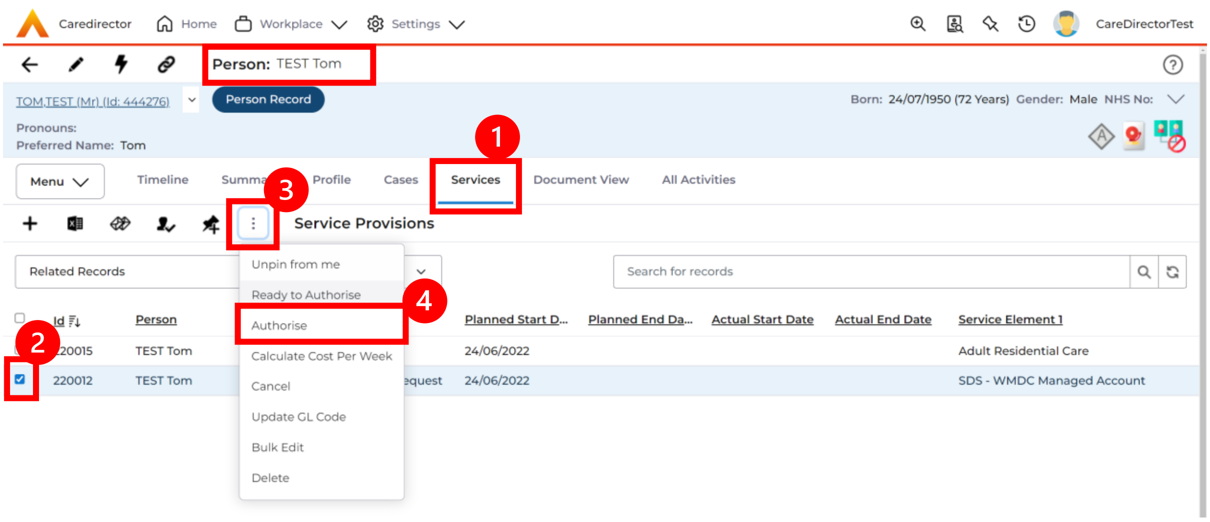
4. Then follow the appropriate section to complete the **Service Provision.**

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.**

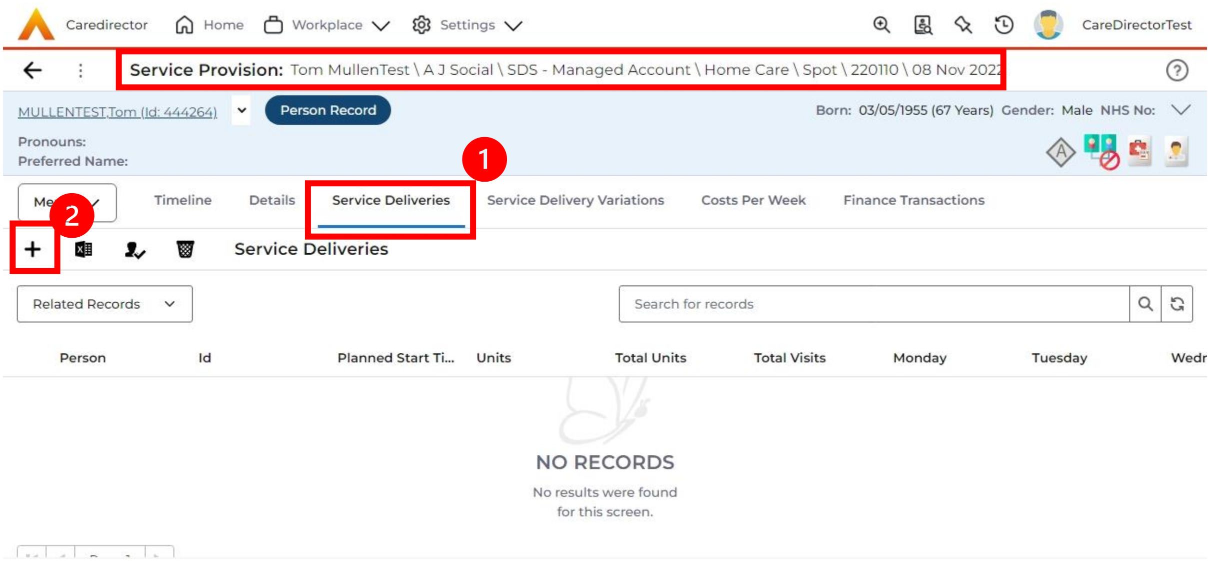


2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise.**



How to input Service Deliveries

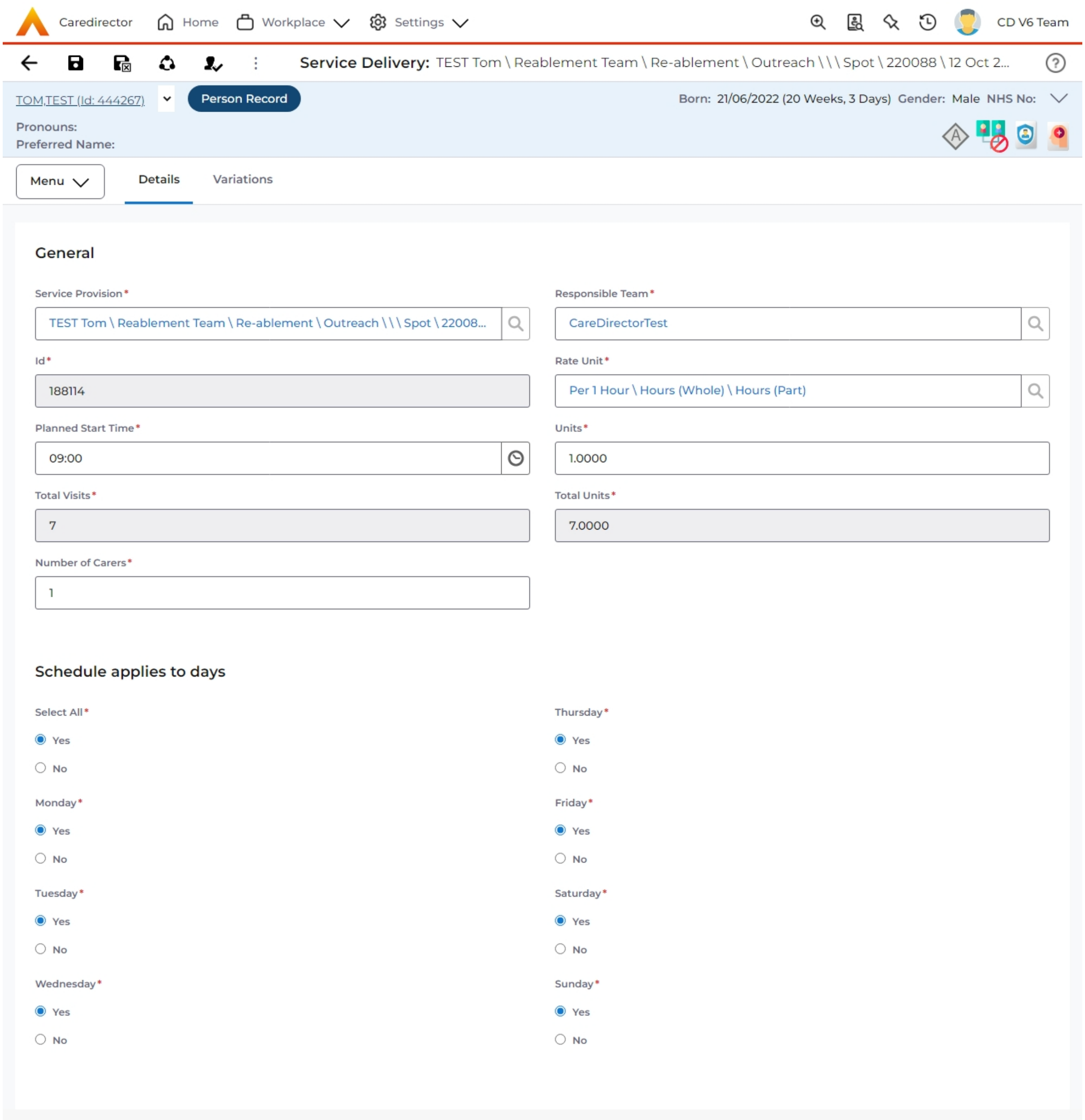
1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.



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.**

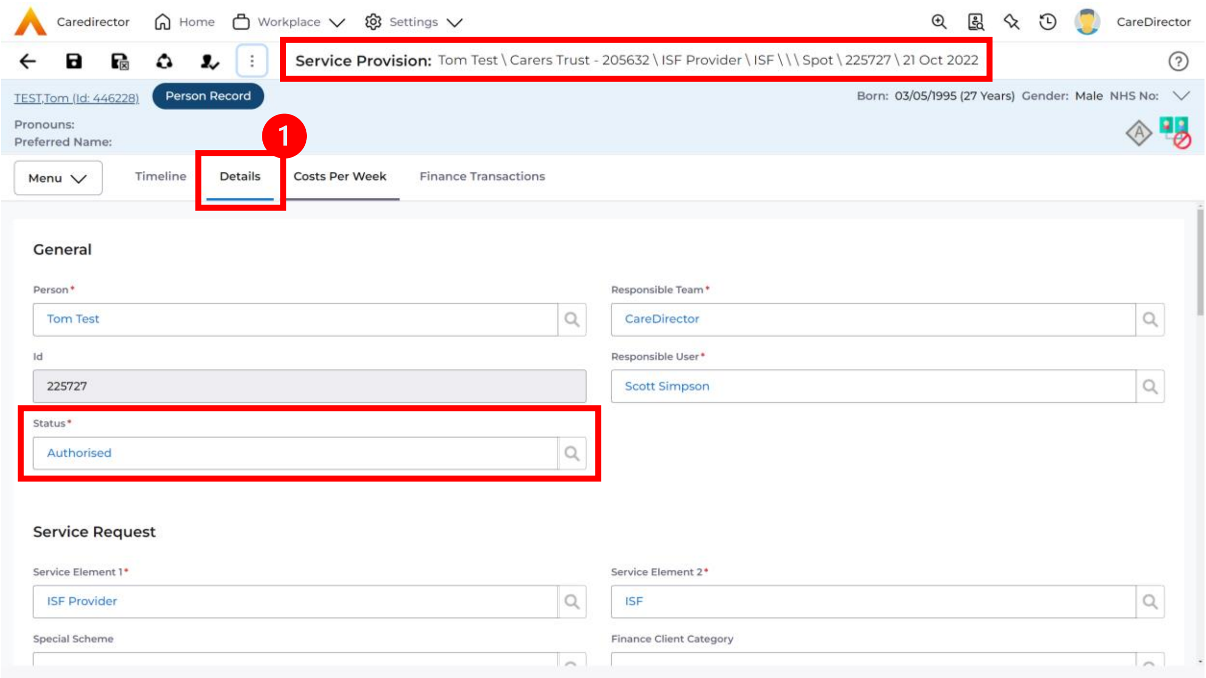
4. Once **Saved,** this will automatically generate **Total Visits/ Total Units.**



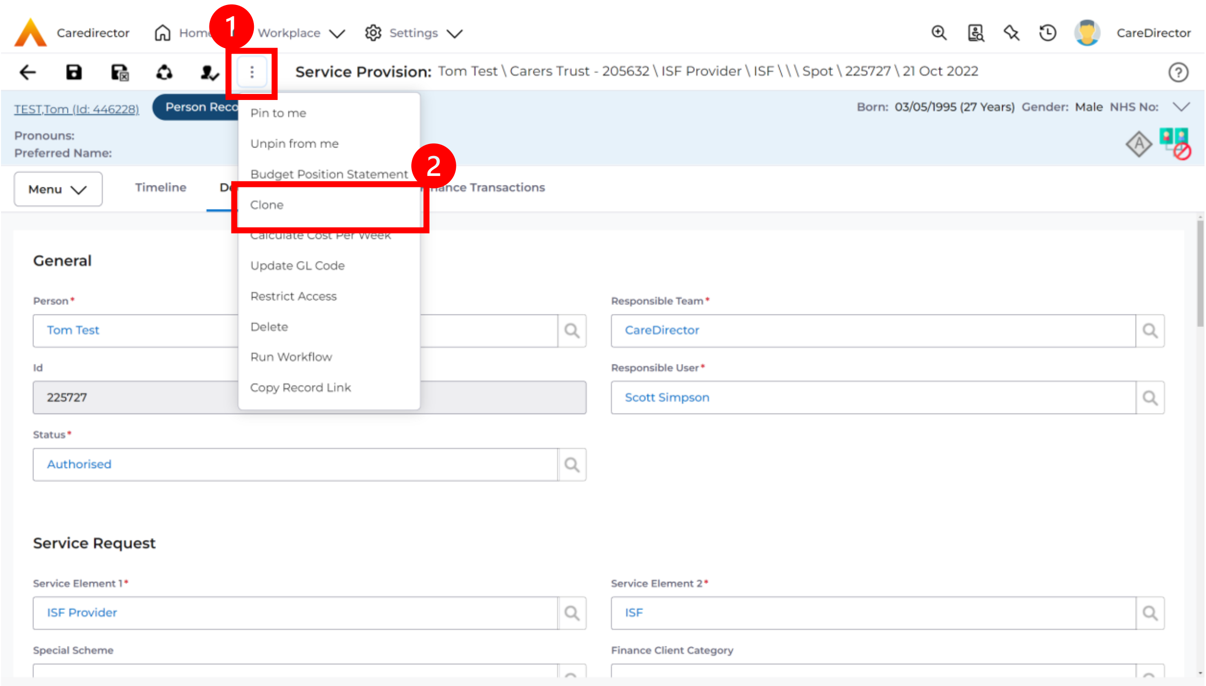
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

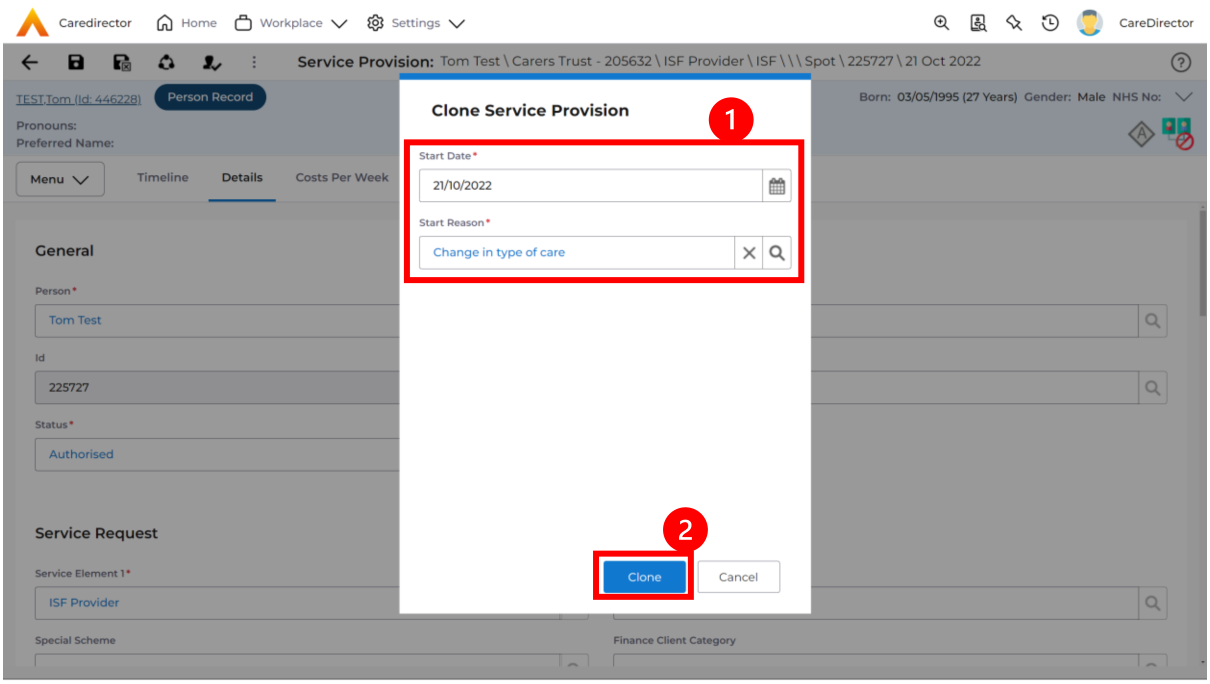
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised.**



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

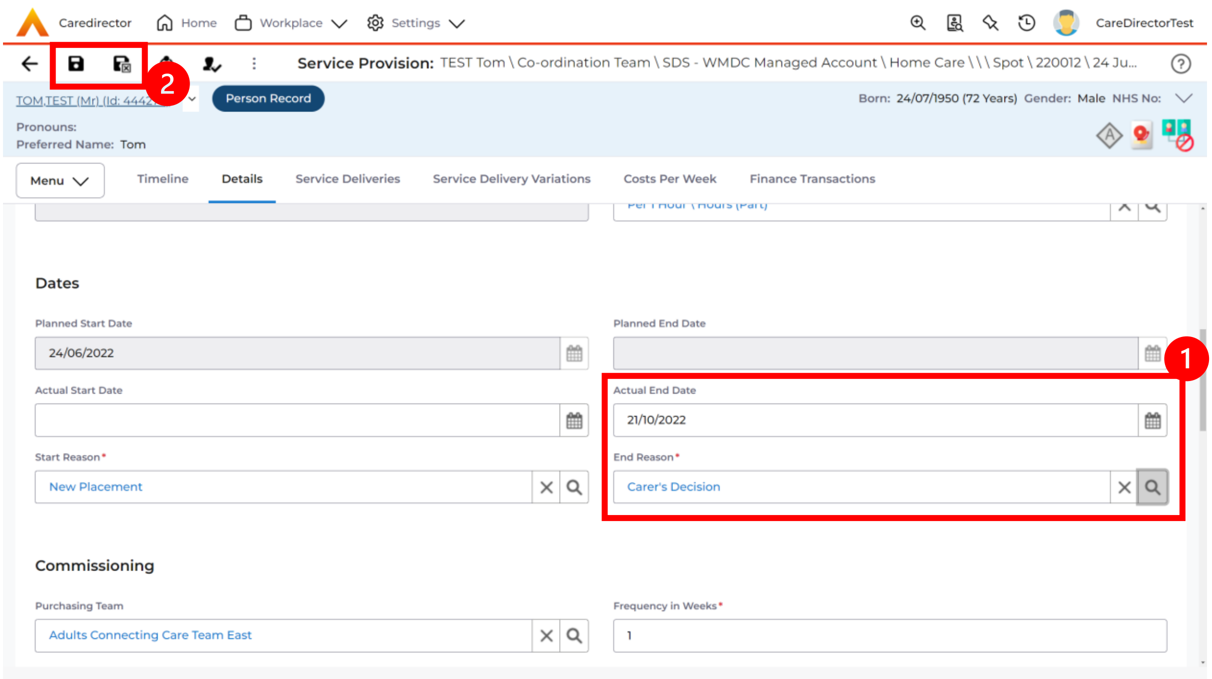


3. Select the new **Start Date** and **Start Reason** and select **OK**.



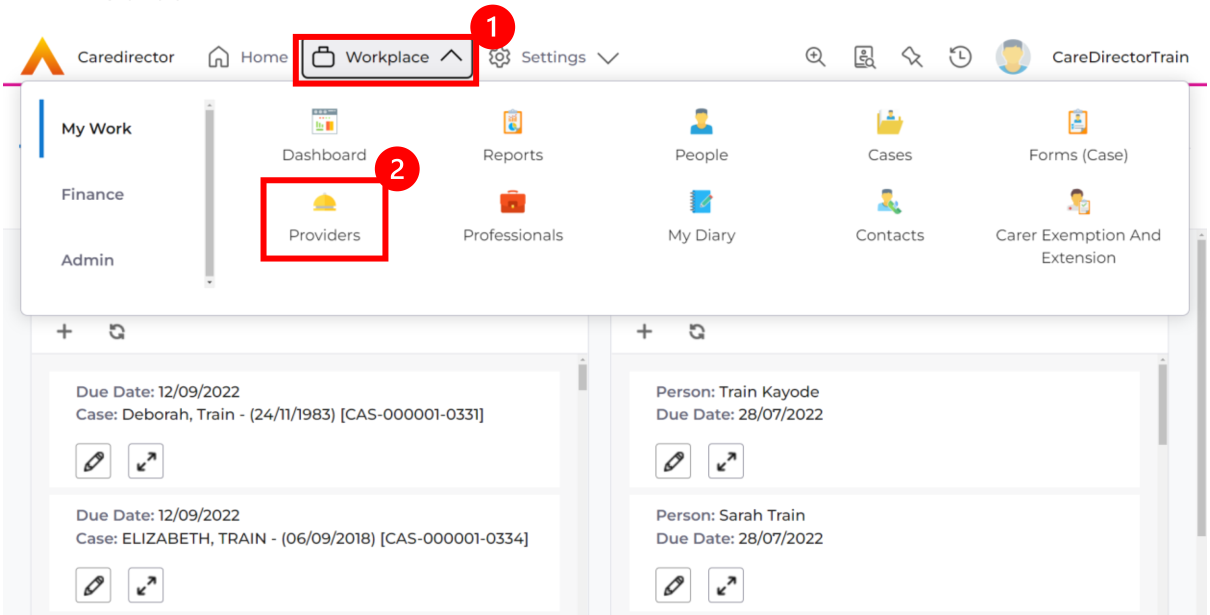
How to End Service Provisions

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.**

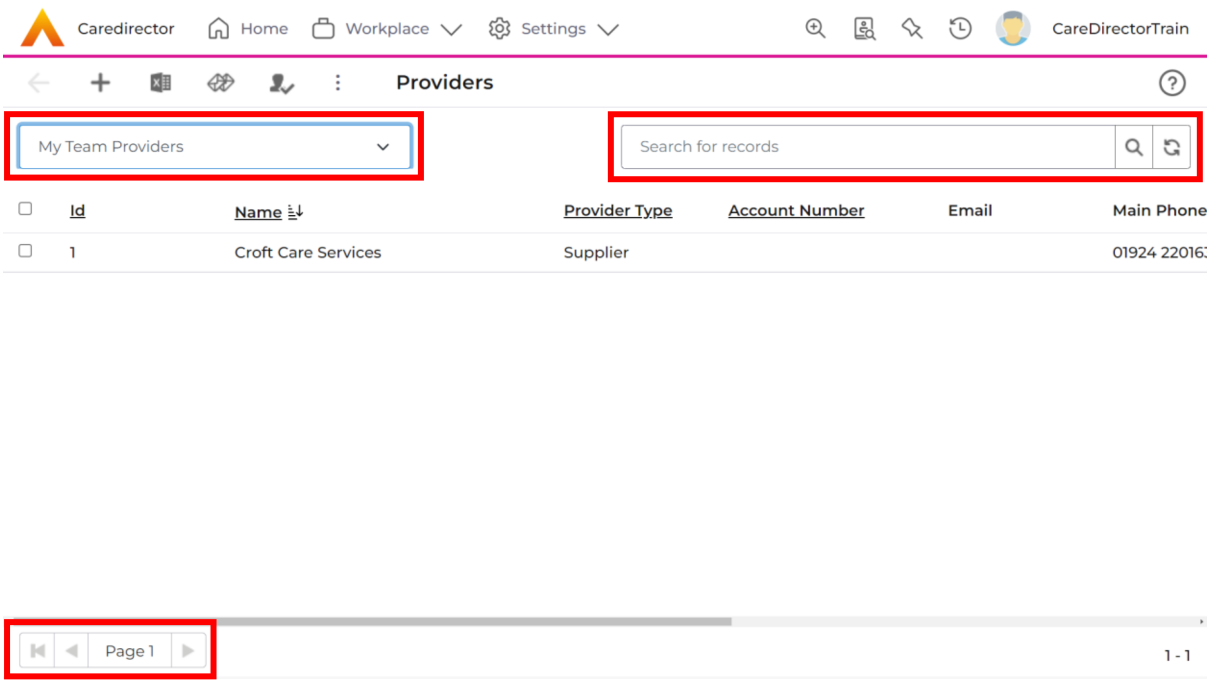


How to search for a Provider

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

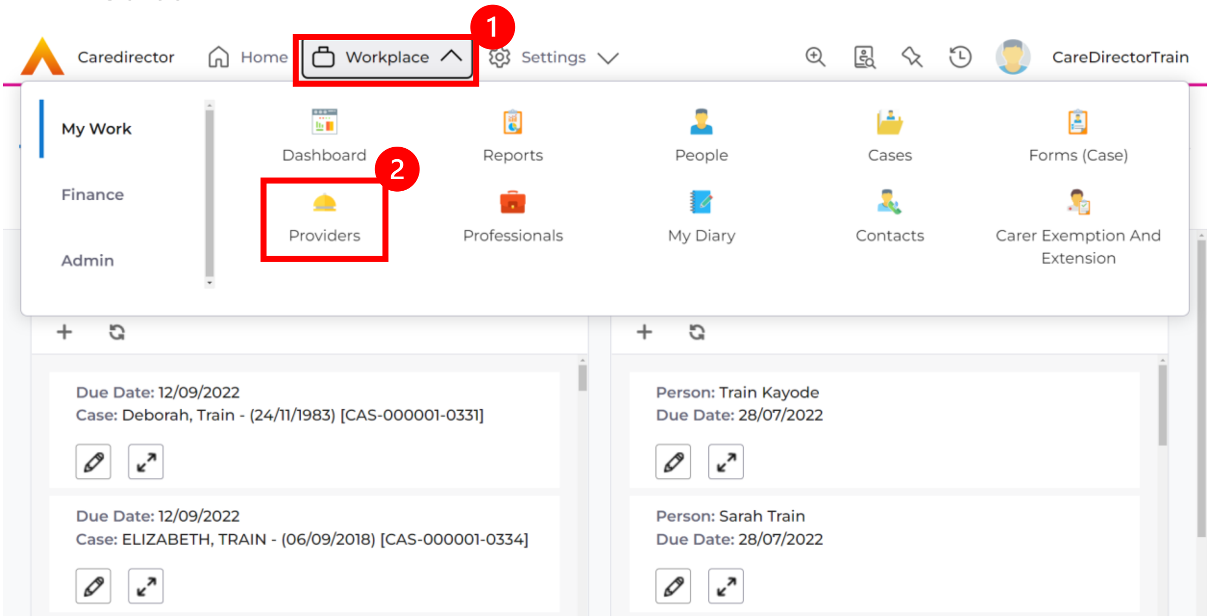


2. Use the **System View** or the **Search** box to enter in the name of a **Provider.** Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

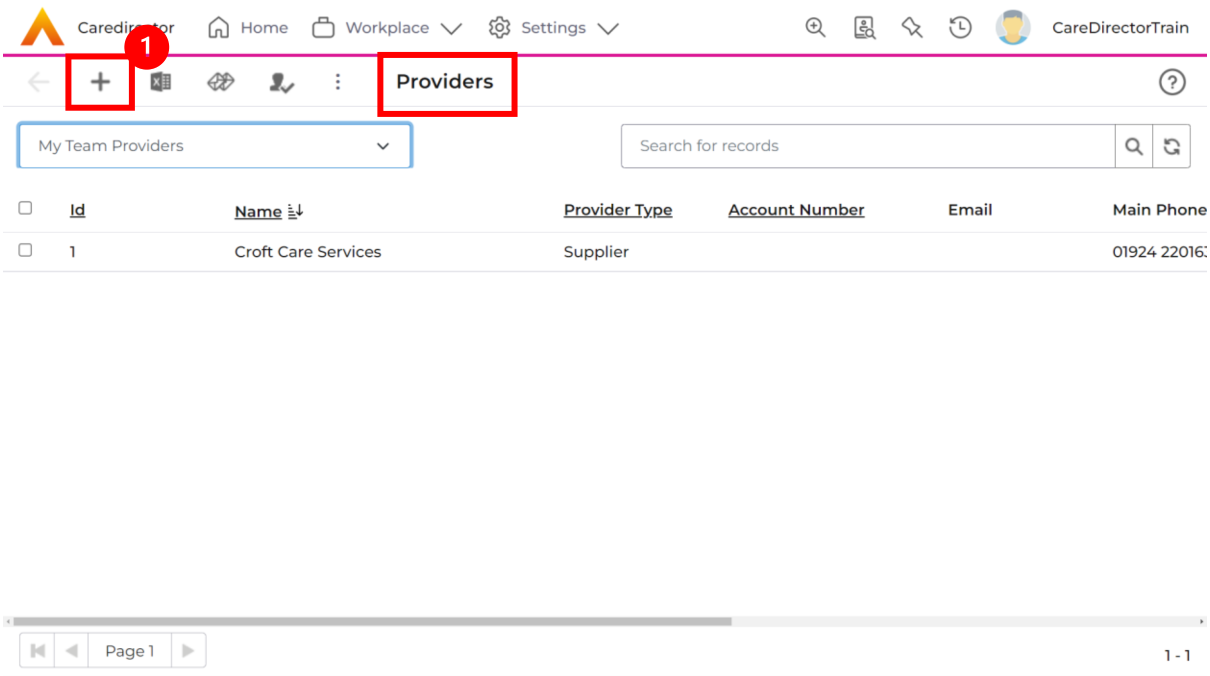


How to set up a new Provider

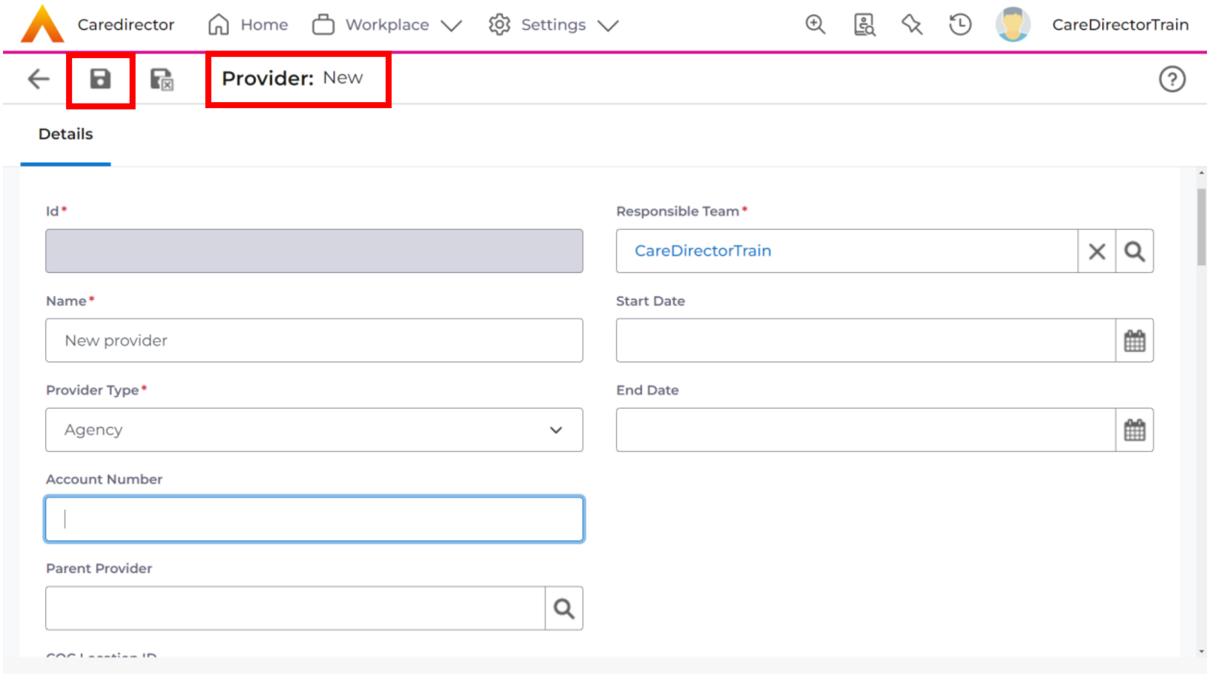
1. Select **Workplace**, then **Provider**. This will open the **Provider Search Screen.**



2. If the **Provider** required is not on CareDirector, select the **Create New Record** plus icon on the toolbar. This will open the **Provider Creation Screen.**

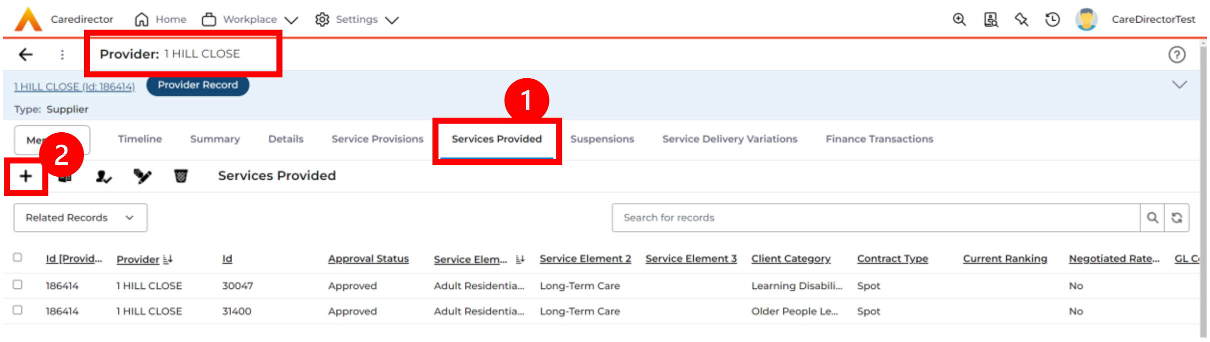


3. Fill in the appropriate information, ensuring all fields marked with a red asterix (*) are completed. When finished, select **Save** from the toolbar.

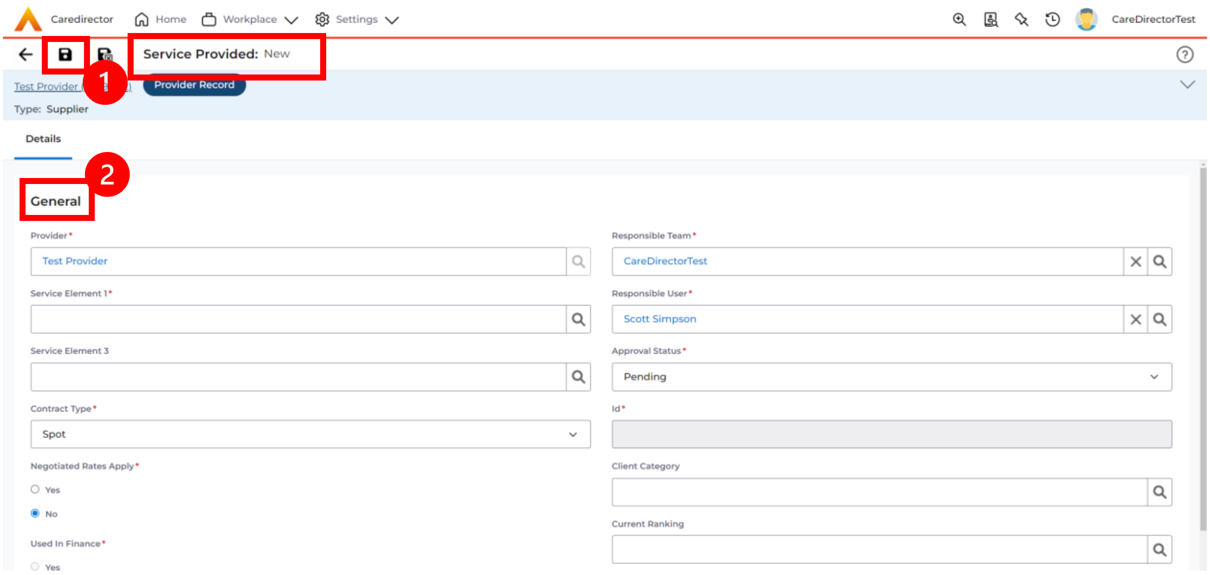


How to add a Service Type

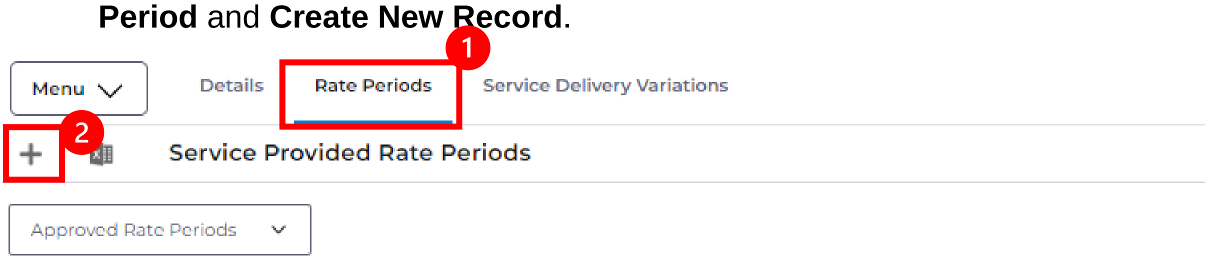
1. Locate the **Provider**. Select the **Services Provided** tab and select **Create New Record** from the toolbar.



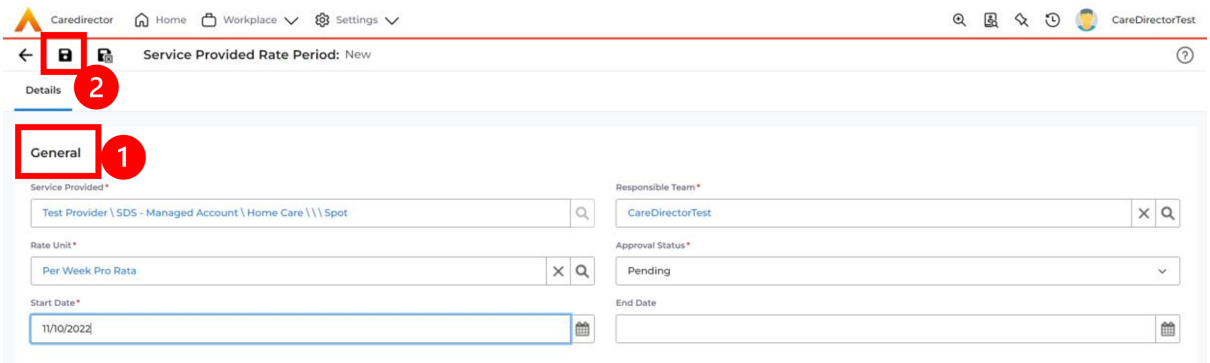
2. The **Services Provided** creation screen will show. Fill out the information ensuring all mandatory fields are completed before **Saving**.



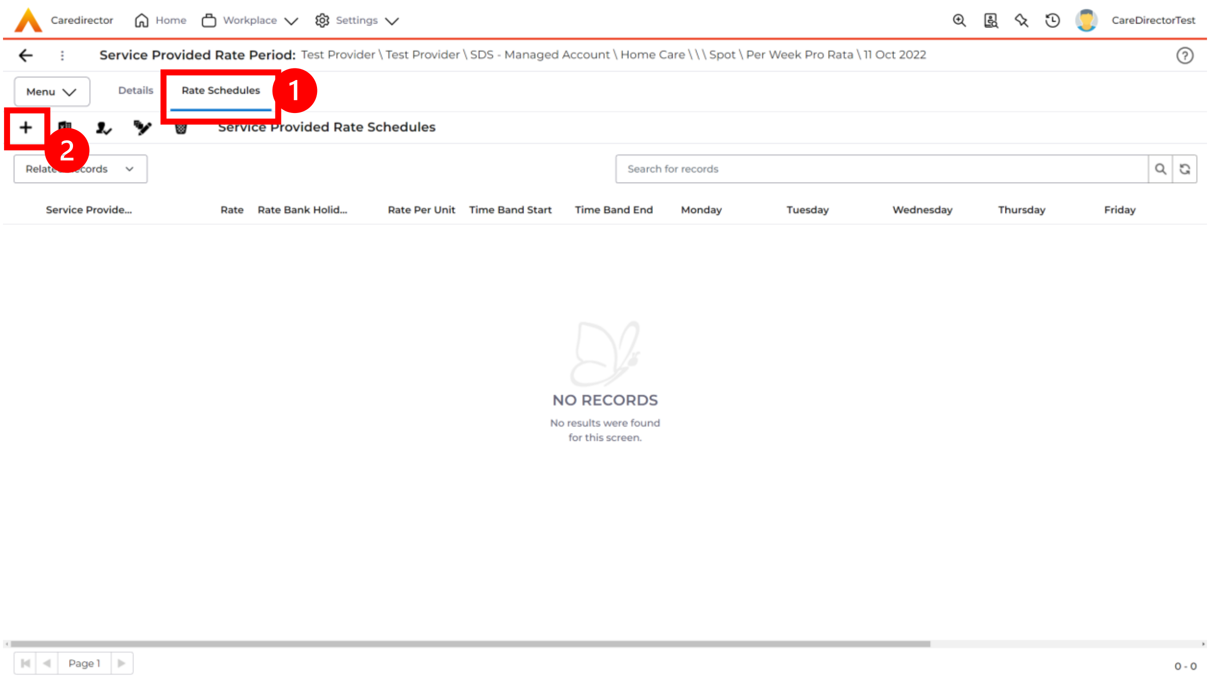
3. When **saved,** a **Rate Periods** tab will appear. Select it and select **Create New Record** from the toolbar or input an **End Date** into an existing **Rate Period** and **Create New Record**.



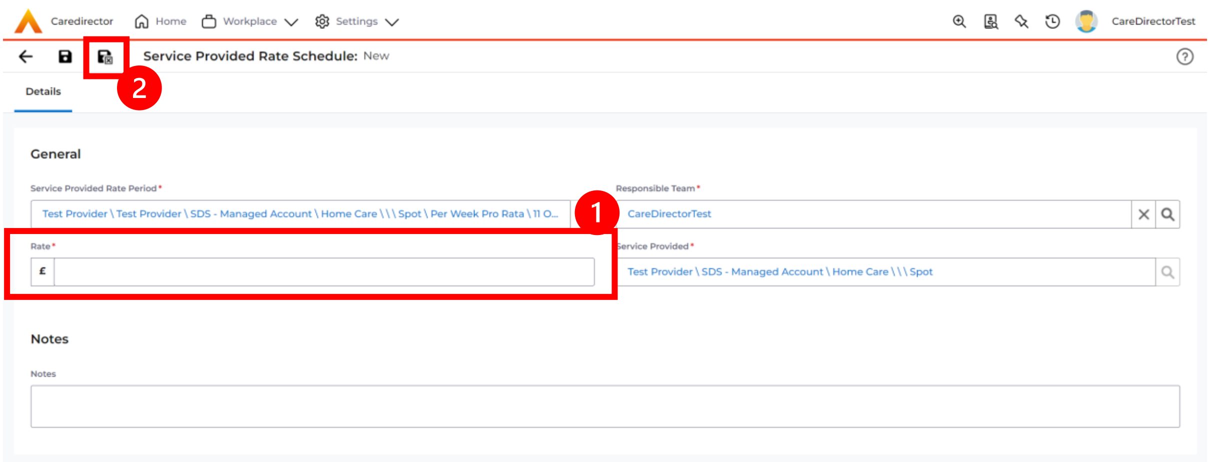
4. Enter the relevant information and select **Save** from the toolbar.



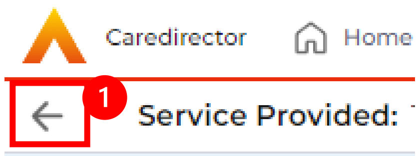
5. A new tab called **Rate Schedules** will appear. Select the tab and select **Create New Record** from the toolbar.



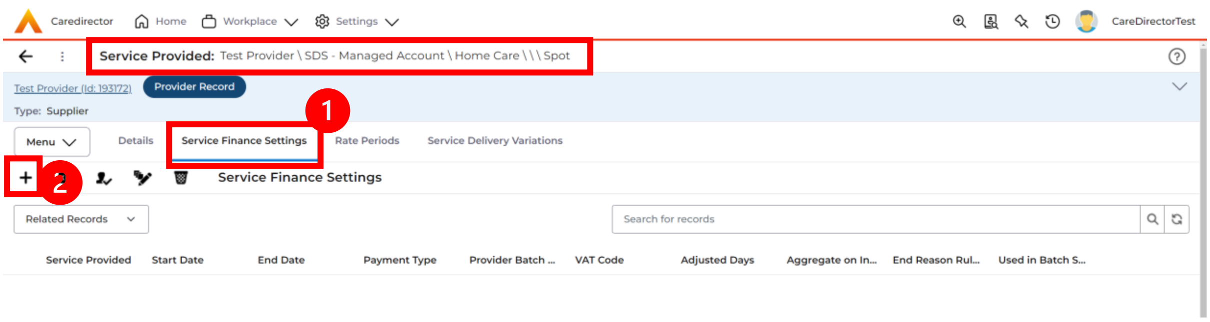
6. Enter the appropriate **Rate** (you do not have to select days when the **Rate Unit** is **Per Week Pro Rata**). Select **Save and Return to Previous Page** on the toolbar.



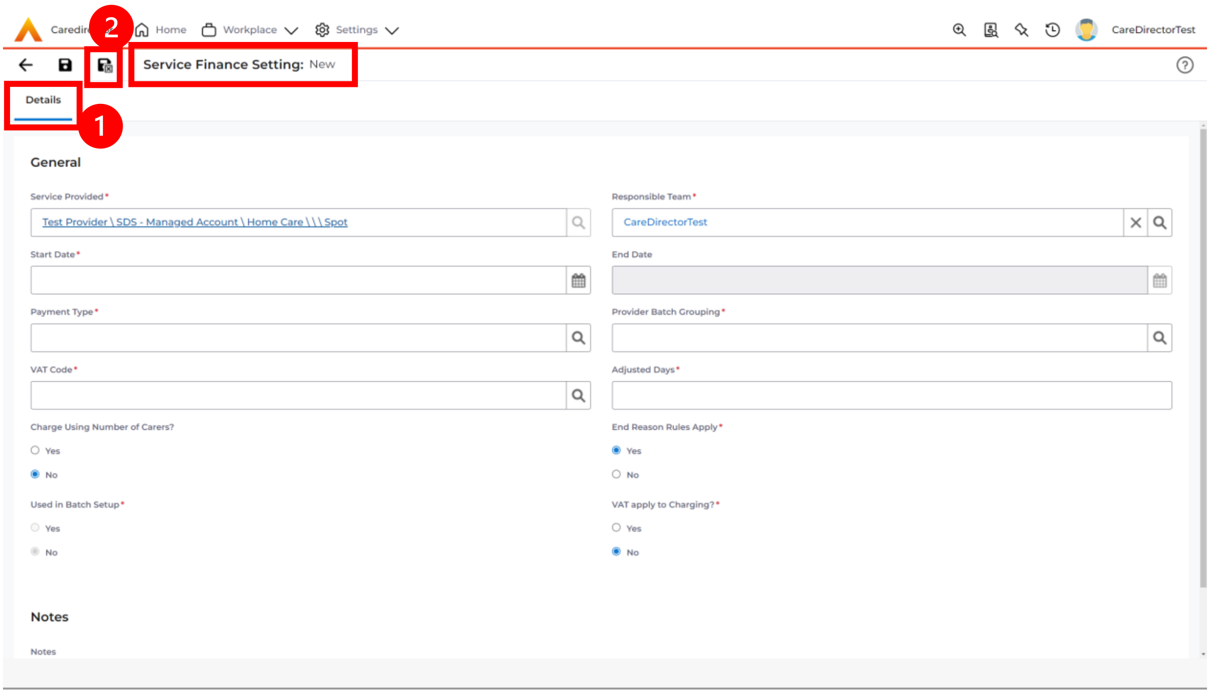
7. Select **Back** on the toolbar to return to **Service Provided.**



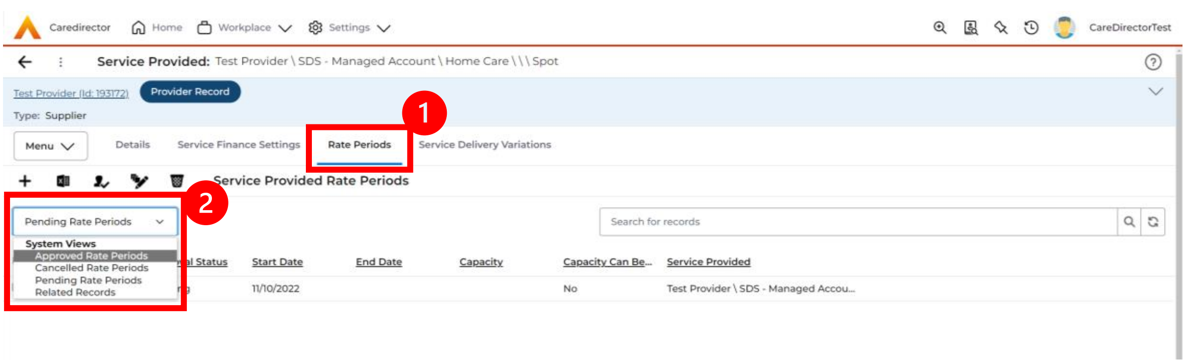
8. Under **Service Provided** select the **Service Finance Settings** tab and **Create New Record** from the toolbar.



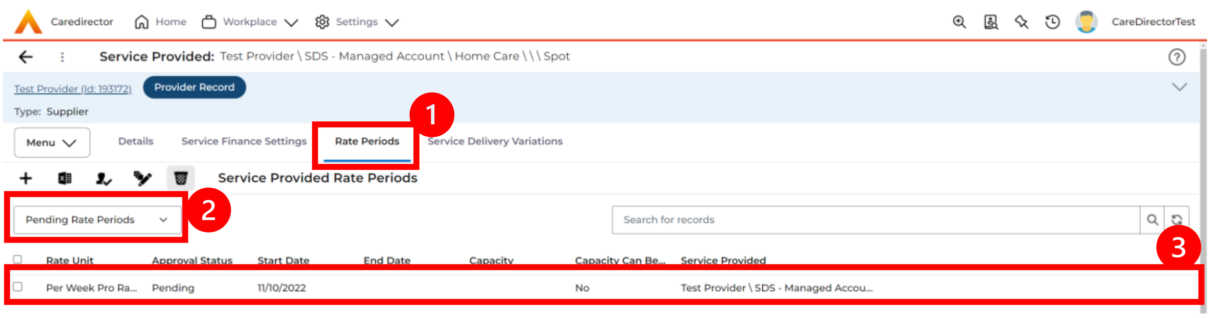
9. Enter the relevant information and when completed, select **Save and Return to Previous Page.**



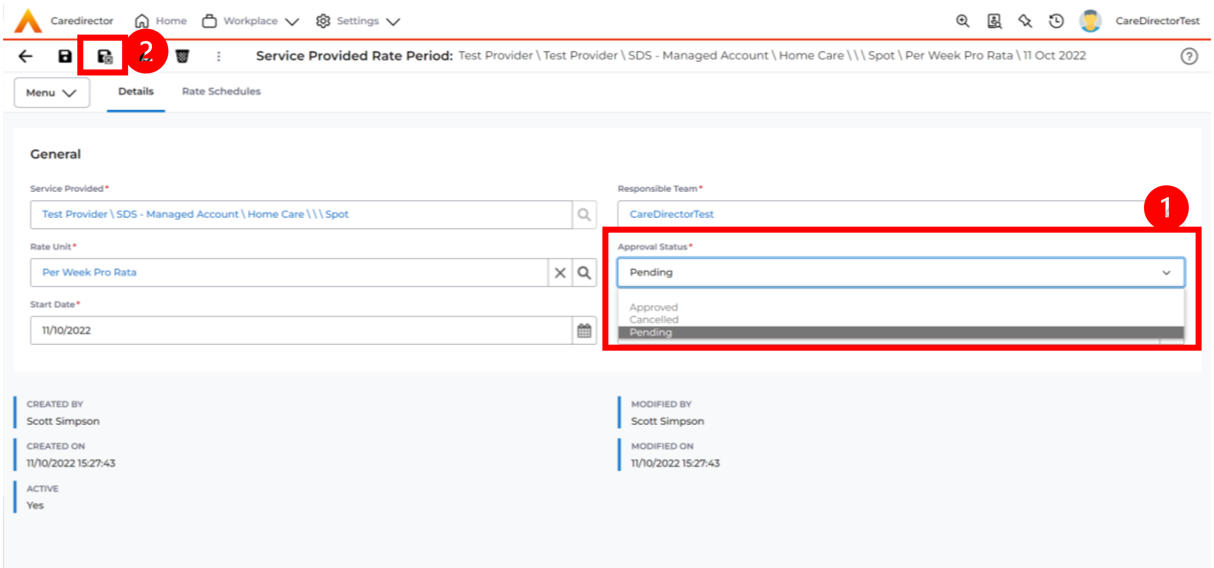
10. Select **Rate Periods.** The **System View** can be changed to show only **Pending Rate Periods** or **Approved Rate Periods**. Select **Pending Rate Periods** this will show records that need to be changed the status of.



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



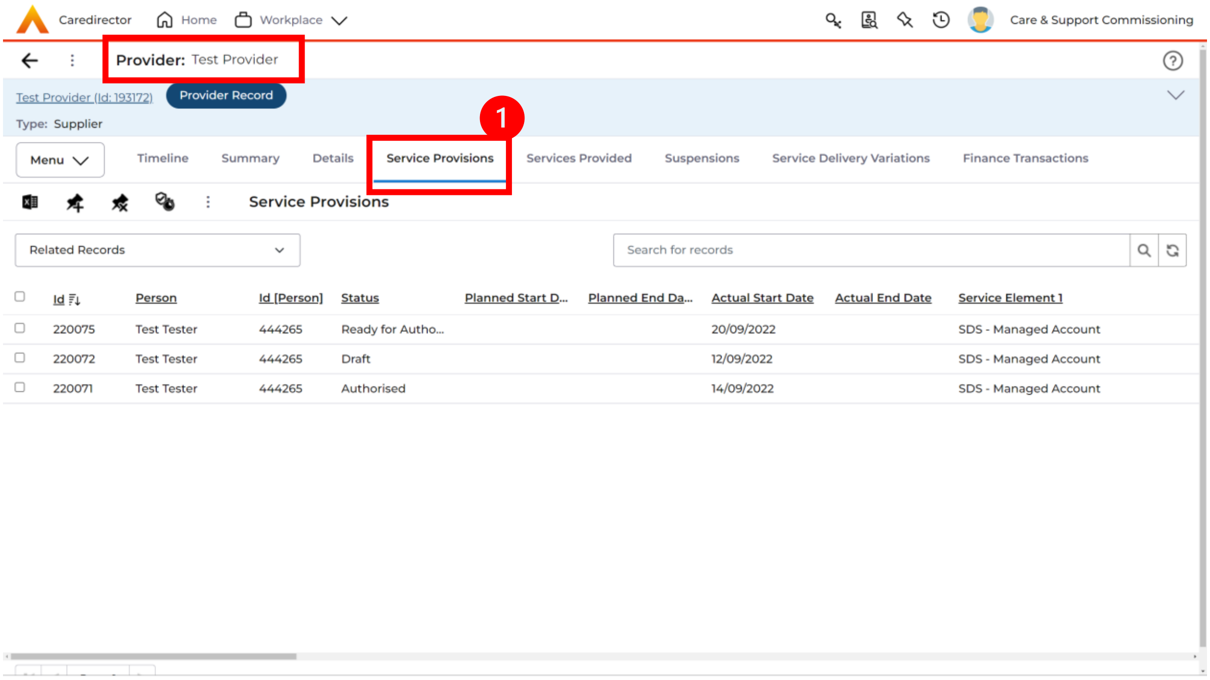
12. Change the **Approval Status** from the **Pending** to **Approved.** Select **Save and Return to Previous Page** from the toolbar.



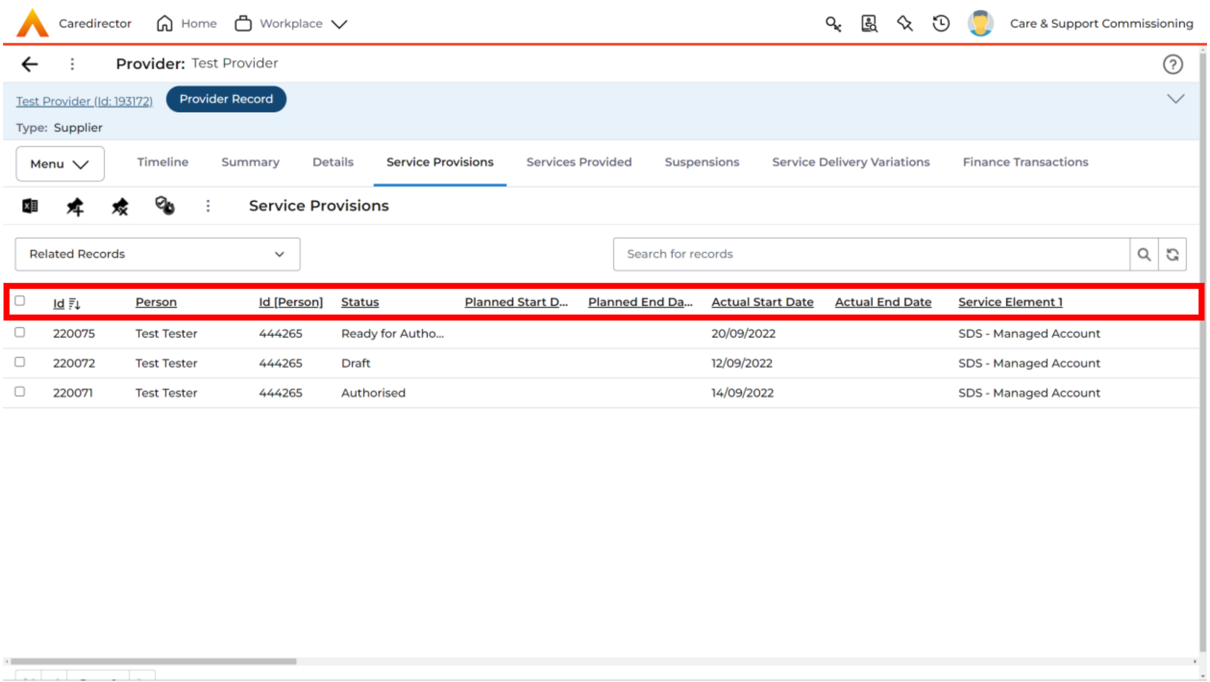
13. Your **Provider** is now able to be used in **Service Provisions**. A new **Service Provided** record will need setting up for each **Band** relevant to that **Provider.**

How to see Provider Service Provisions

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

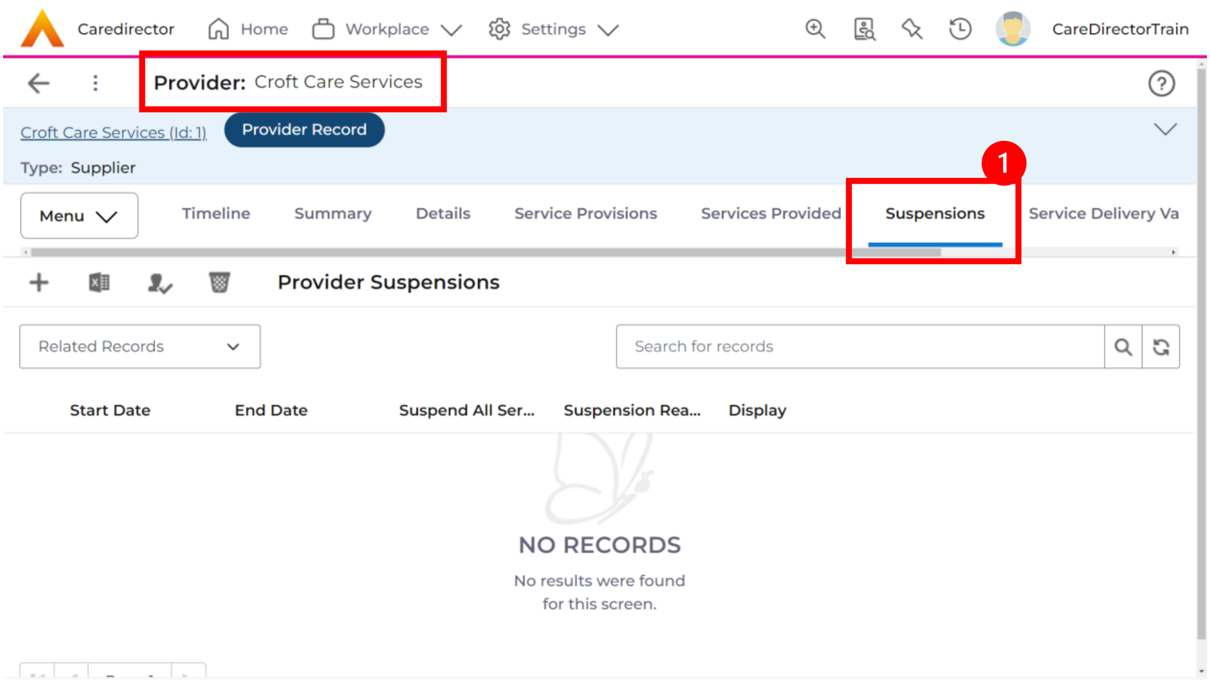


2. This will show information based around the **Service Provisions** that are undergoing under this **Provider**. Scroll across this page to see information based on the headings. Select a **Service Provision** to see more.



How to see Provider Suspensions

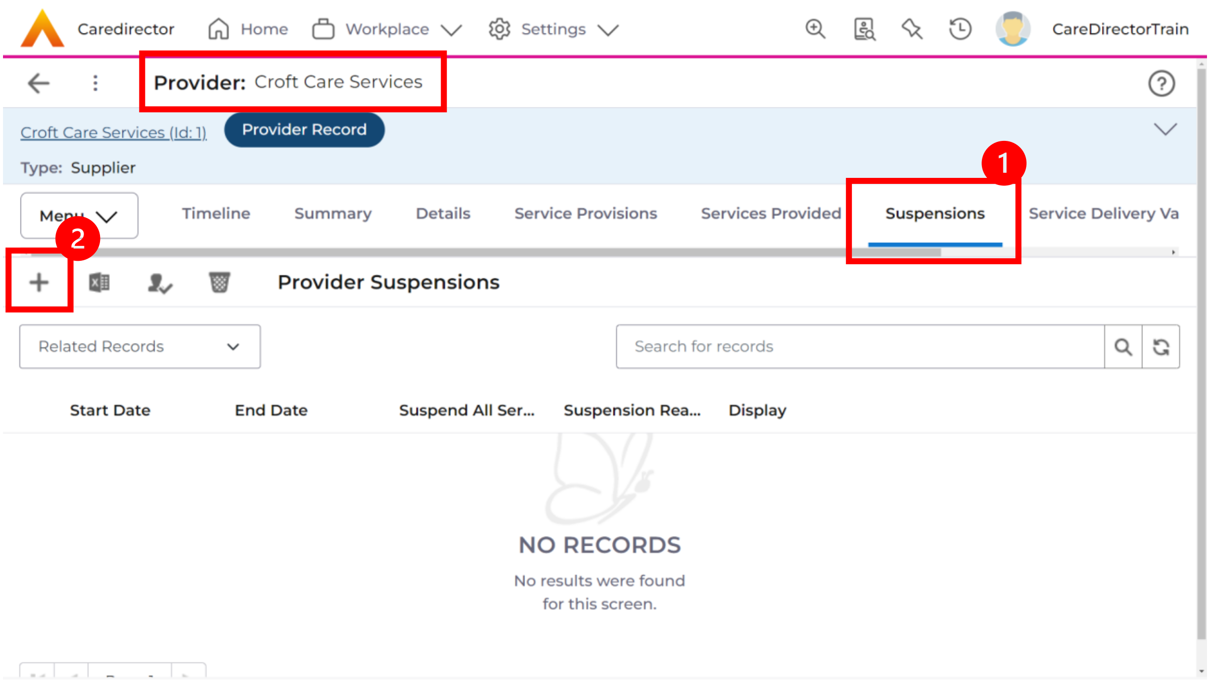
1. Locate the relevant **Provider.** Once on the **Provider** screen, select the **Suspensions** tab.



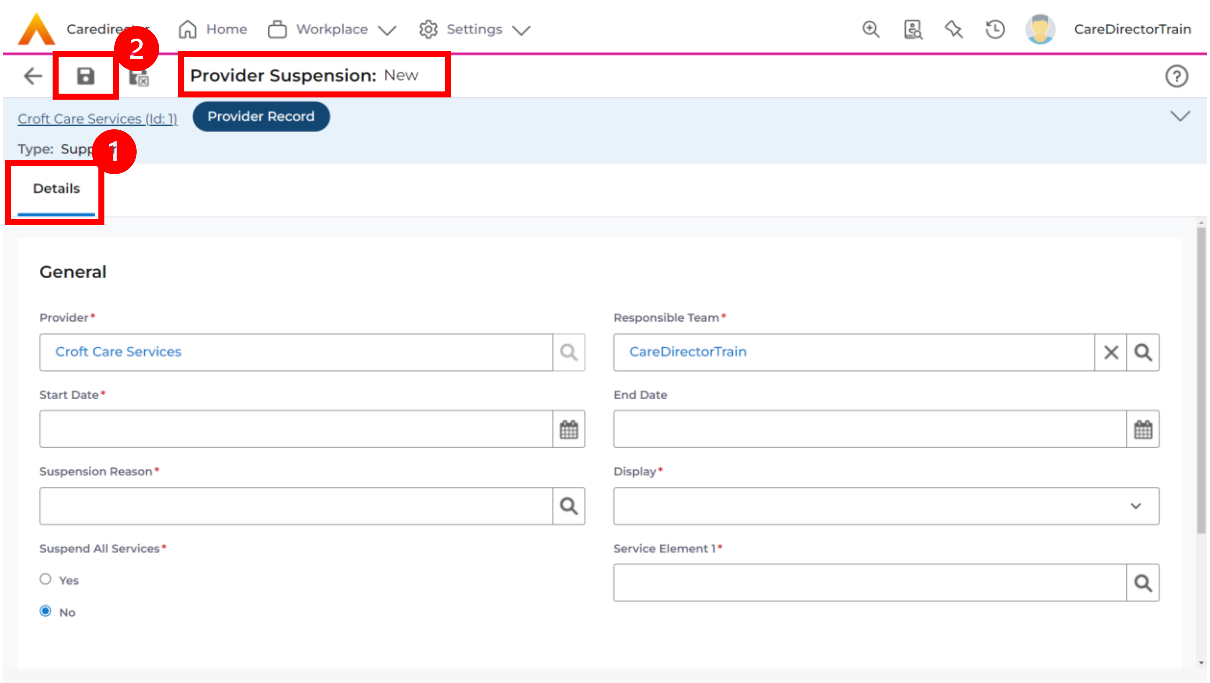
2. This will show a list of all **Suspensions** occurred on the **Provider.**

How to add a Suspension on a Provider

1. Locate the relevant **Provider.** Once on the **Provider** screen, select the **Suspensions** tab. Once there, select the **Create New Record** on the toolbar.



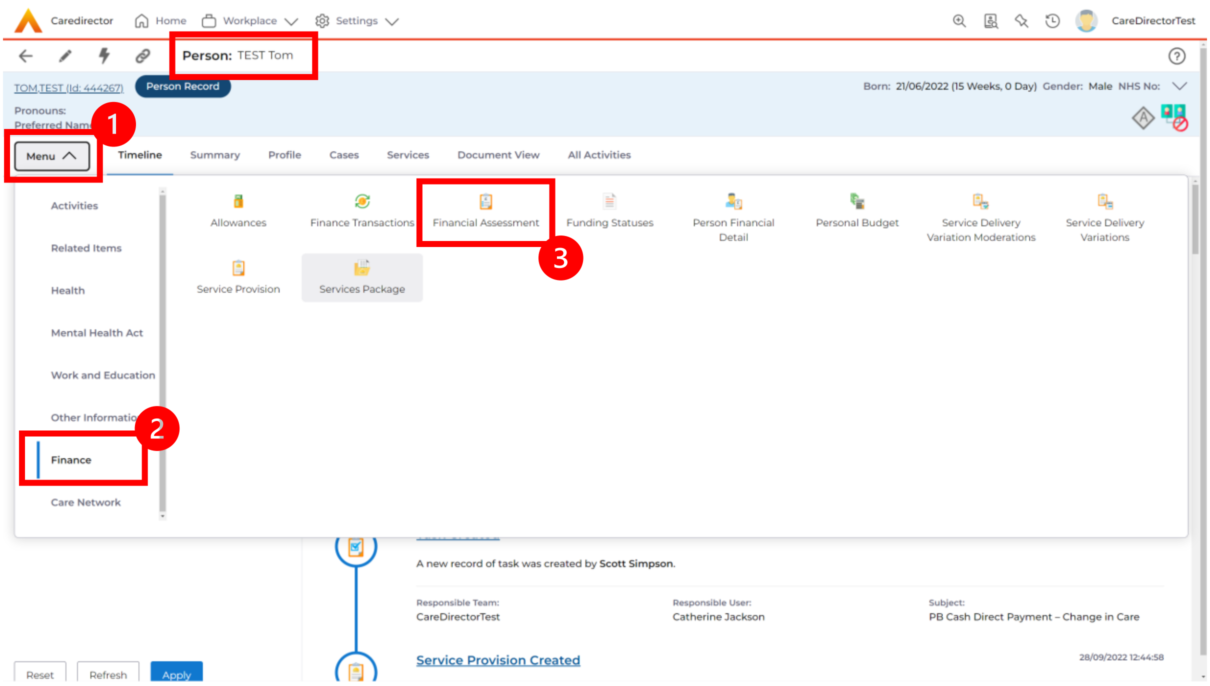
2. This will open the **Suspension** creation screen. Fill in the mandatory fields and select **Save** from the toolbar when done.



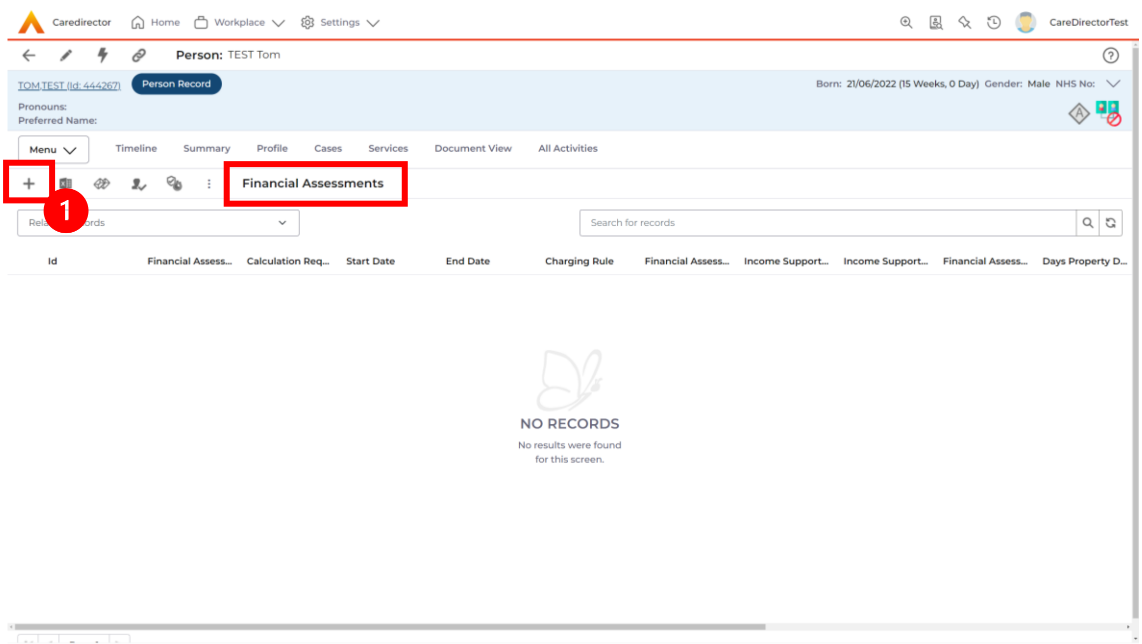
How to input Financial Assessments

Where to find Financial Assessments

1. Locate the **Person Record** to create/ view a **Financial Assessment** on. Select **Menu, Finance** then select **Financial Assessment.**



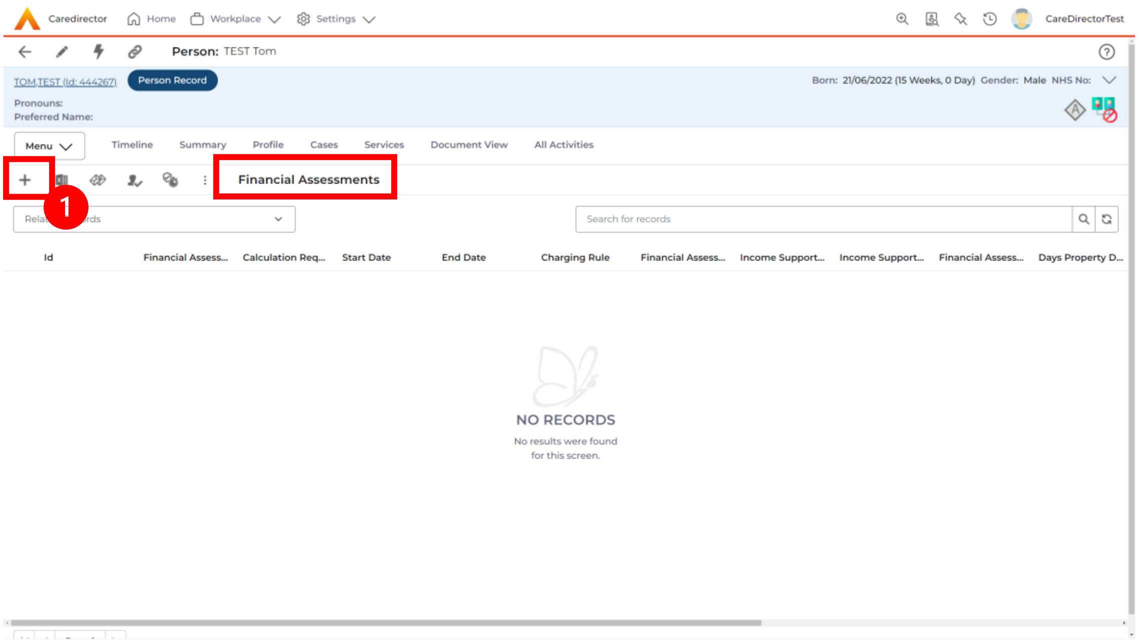
2. Once there, to view an existing **FA** select it, however select the **Create New Record** function from the toolbar.



How to input a Financial Assessment Managed Account

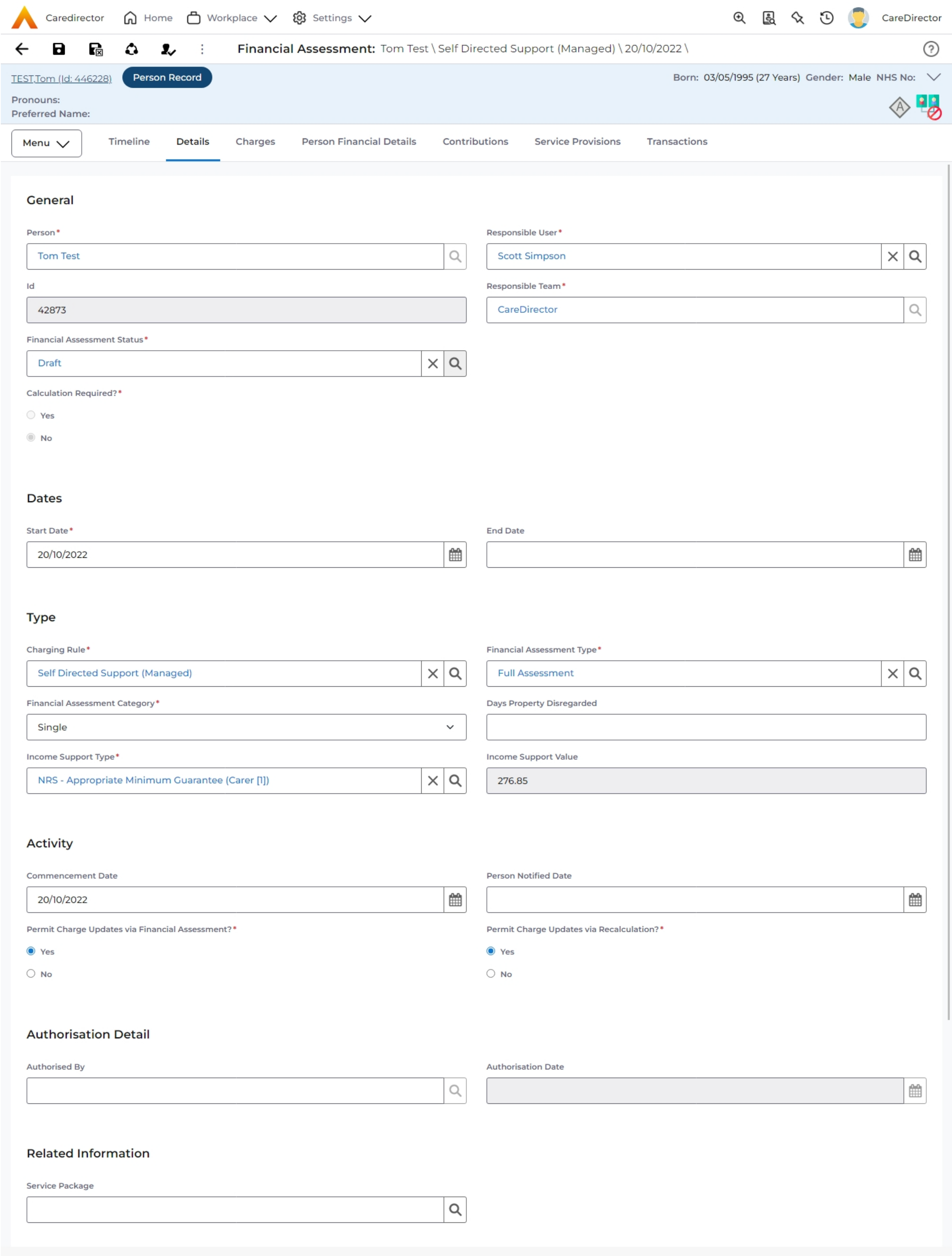
Creating the Financial Assessment (SDS – Managed Account)

1. Locate the **Financial Assessment** record on the **Person Record**. Then select **Create New Record**.



2. Next is the information that is required:
    a. **Responsible User/ Team** choose is responsible.
    b. **Start Date** as needed.
    c. **Charging Rule** select **Self Directed Support (Managed).**
    d. **Financial Assessment Type** select appropriate option**.**
    e. Under **Income Support Type** and **Financial Assessment Category** select the relevant option.
    f. Select **Yes** or **No** to the **Permit Charge Updates via Financial Assessment** and **Recalculation.**

3. When finished, select **Save.**

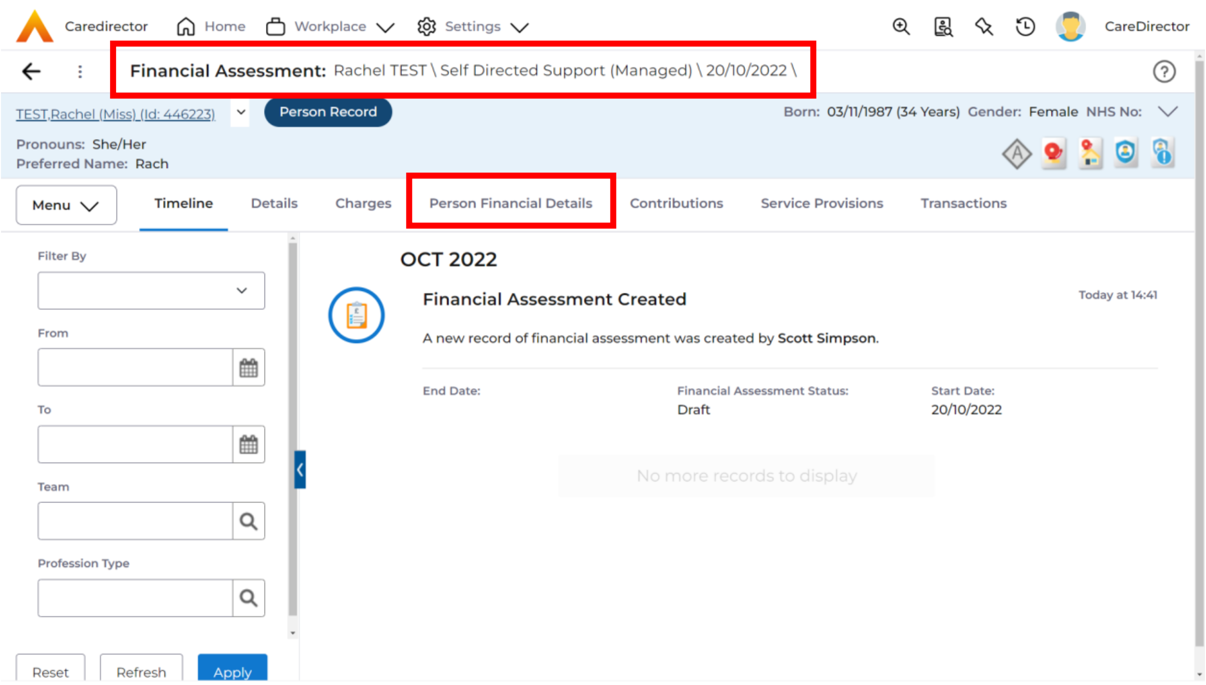


4. Now the **Financial Assessment** for **Self-Directed Support (Managed Account)** requires more personal information.

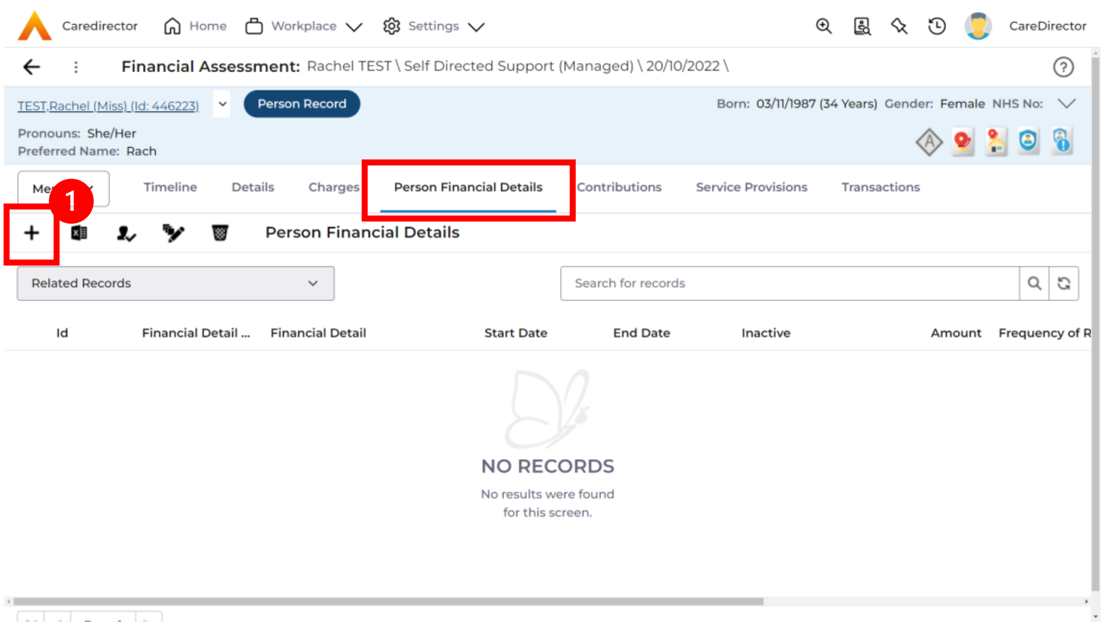
Entering Personal Information

1. This requires knowledge of **Benefits & Income**, **Assets**, **Allowable Expenses** of the **Service User**.

2. After you have **Saved** the **Financial Assessment** or relocated it. You should by default be on the **Timeline** and see **Person Financial Details** as a tab.



3. Select **Person Financial Details** and then **Create New Record**.



4. Requirements for this section are as followed:
   a. Leave **ID** blank (system will automatically fill this).
   b. Select the **Responsible Team**.
   c. Select the **Start Date.**
   d. **Person** will automatically be filled in.
   e. **Verification** is the proof that you have seen to provide this **Amount** and **Financial Detail Type.**

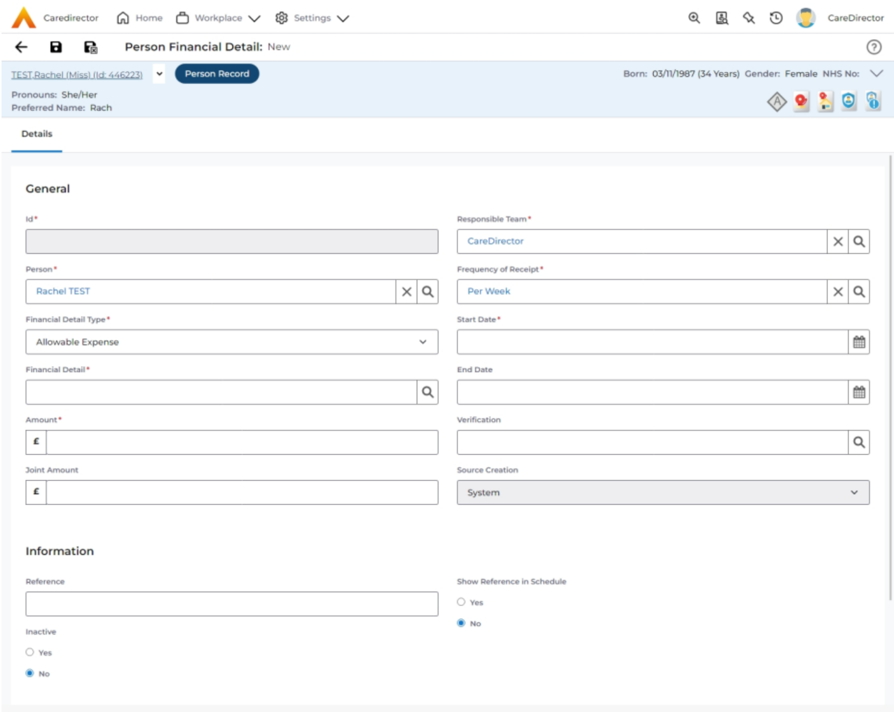
5. **Financial Detail Type** splits into 4:
   a. **Allowable Expense**
   b. **Asset**
   c. **Benefit & Income**
   d. **Property**

6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

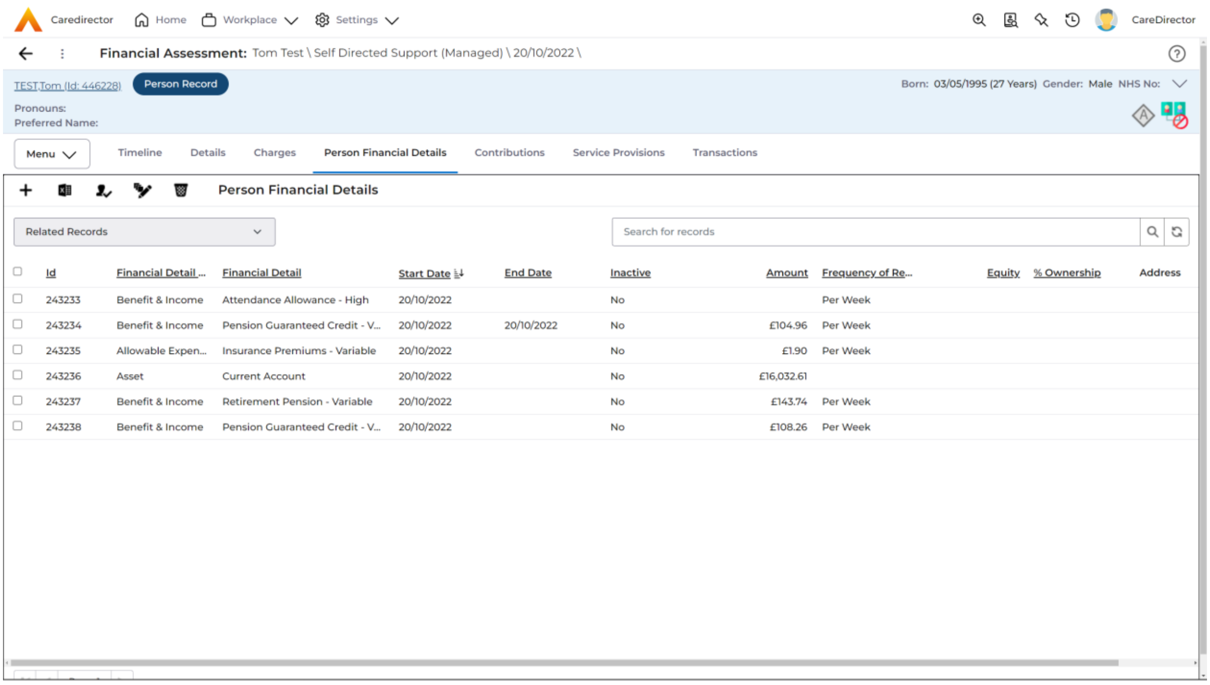
7. Select one that is appropriate. For a **Self Directed Managed Account** requires **all**. Therefore, you may need to complete **Entering Personal Information** to enter all that needs to be calculated for the appropriate **Charge.**

8. **Amount** is how much that individual **Financial Detail Type** is.

9. When finished, select **Save**. Fill out another **Person Financial Detail** if required.

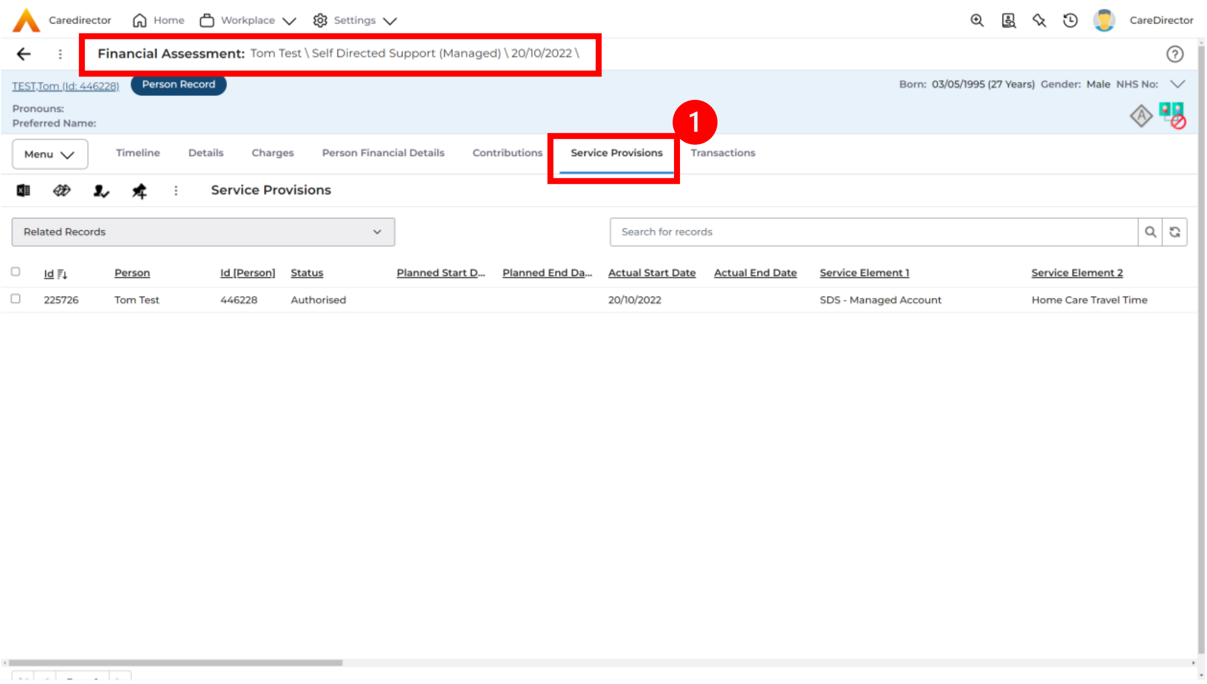


10. When saved and completed as many times as required, it will look like this.



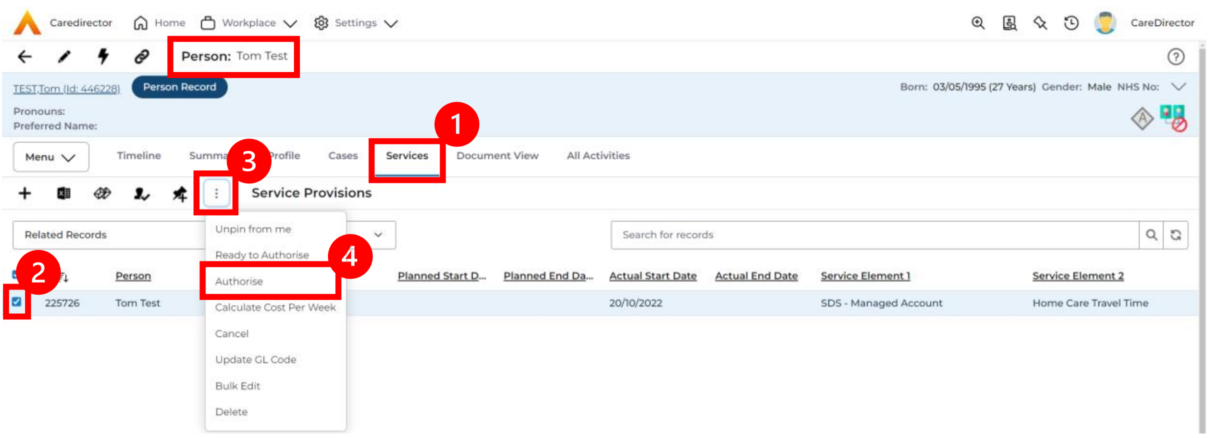
Ensure Service Provisions are linked (How to Authorise Service Provisions)

1. Ensure your **Service Provision** is linked by going to the **Service Provisions** tab on the **Financial Assessment.**



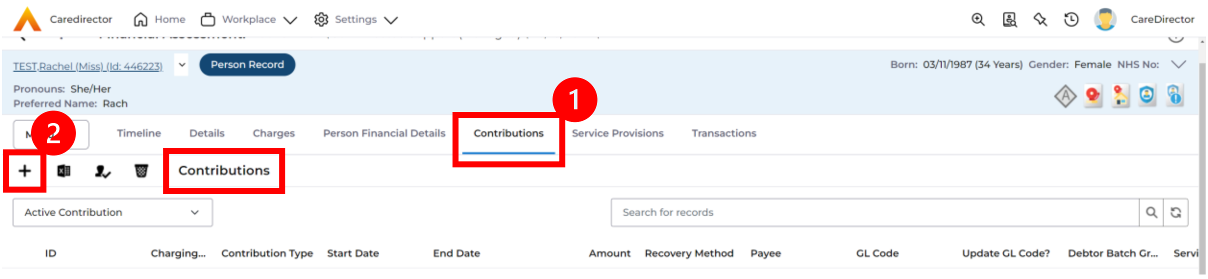
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised.** You will need to refresh your page if so.

3. **To Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

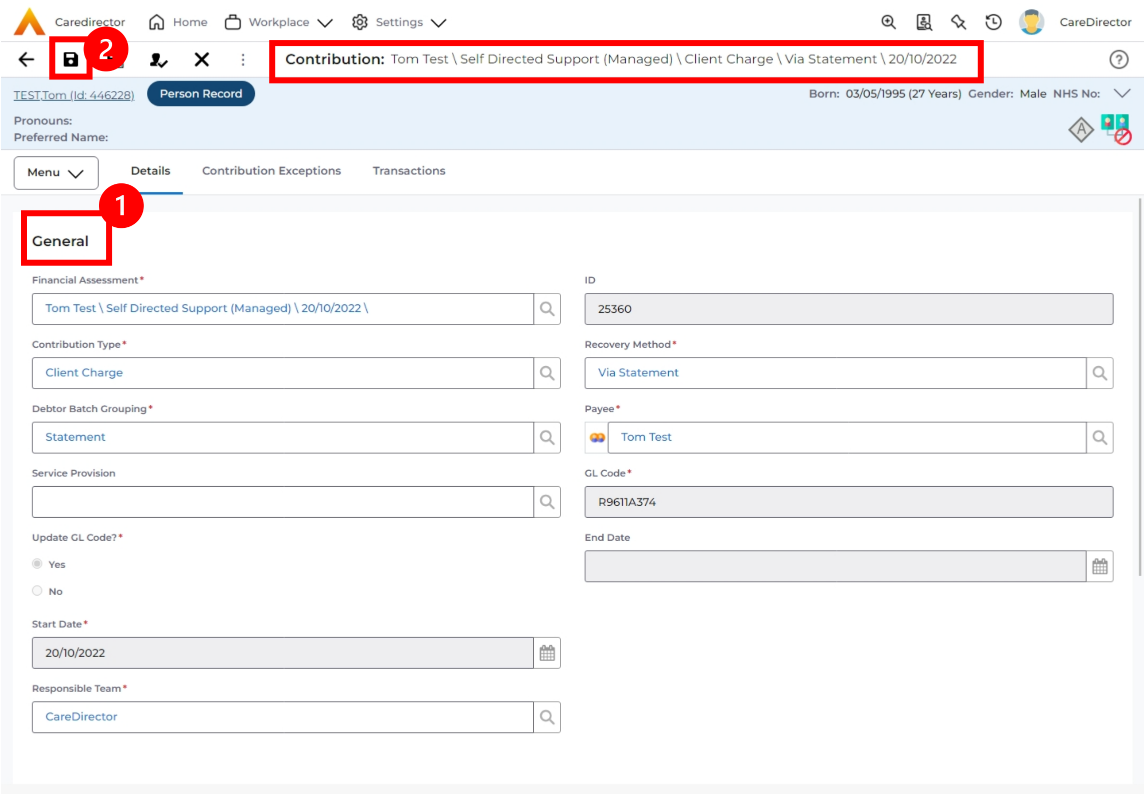


Contributions

1. When **Entering Personal Information** has been completed, we need to include **Contributions**. Locate the **Financial Assessment**, select the **Contributions** tab. Then select **Create New Record**.

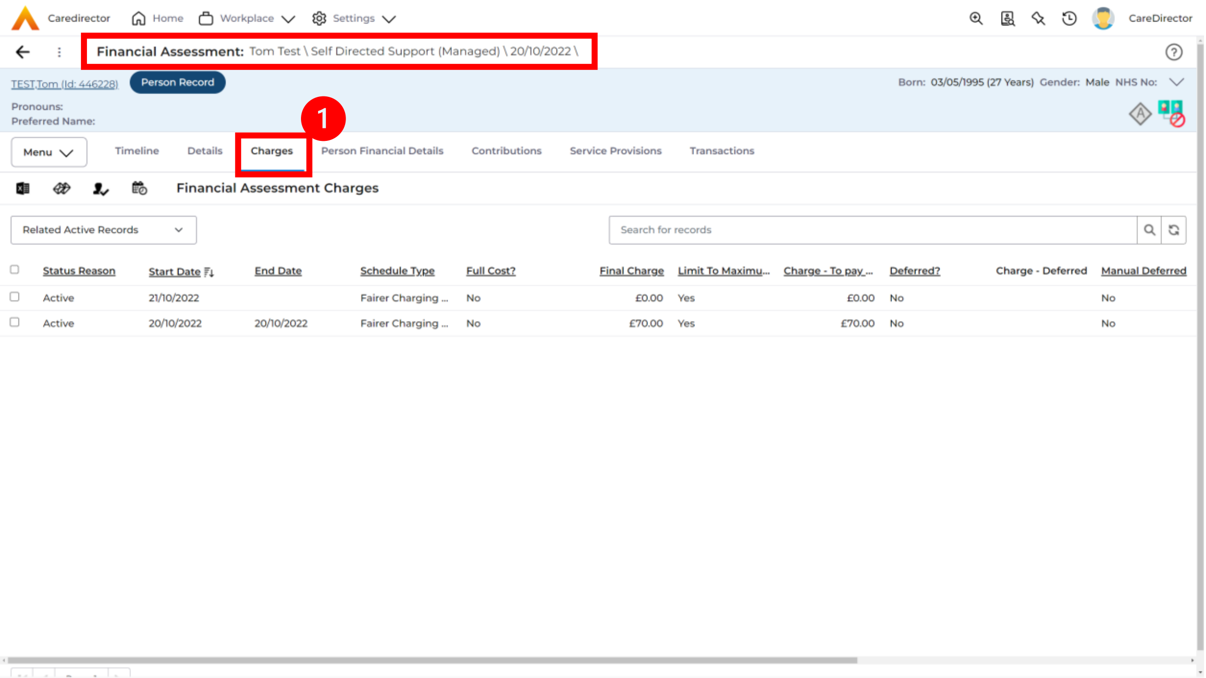


2. Fill in the relevant information. When finished, select **Save.**

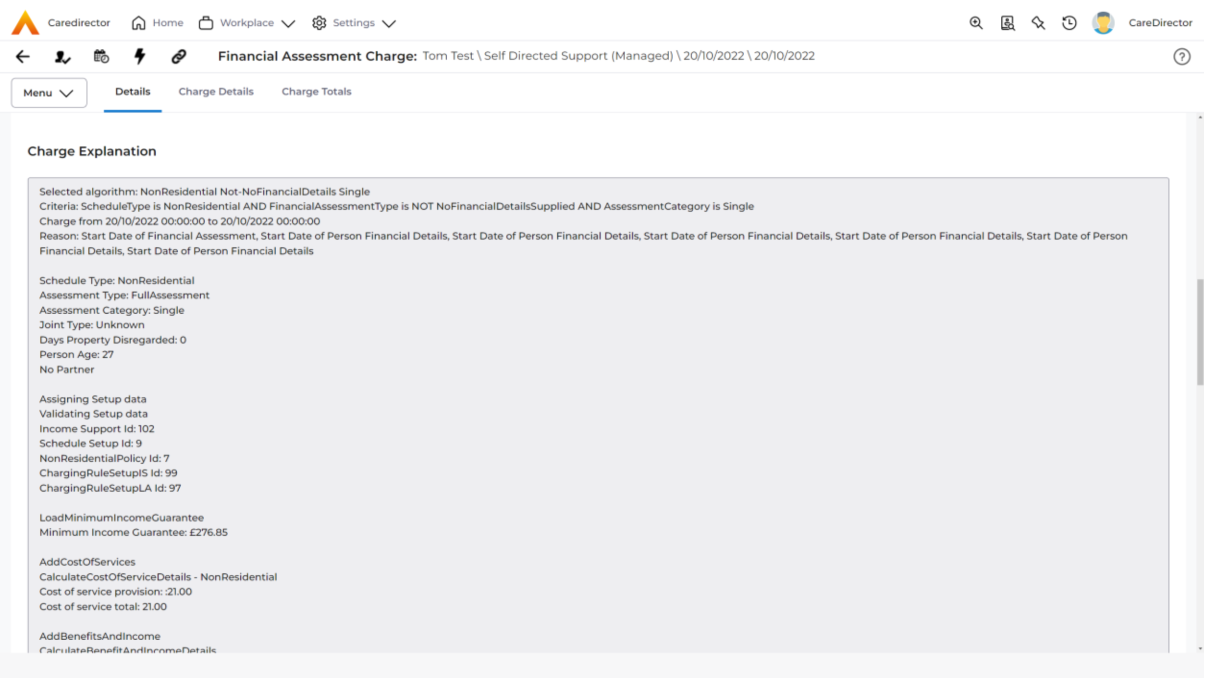


Calculate Charges

1. To check if the **Charges** are being calculated, select the **Charges** tab. This will show the **Final Charge**.



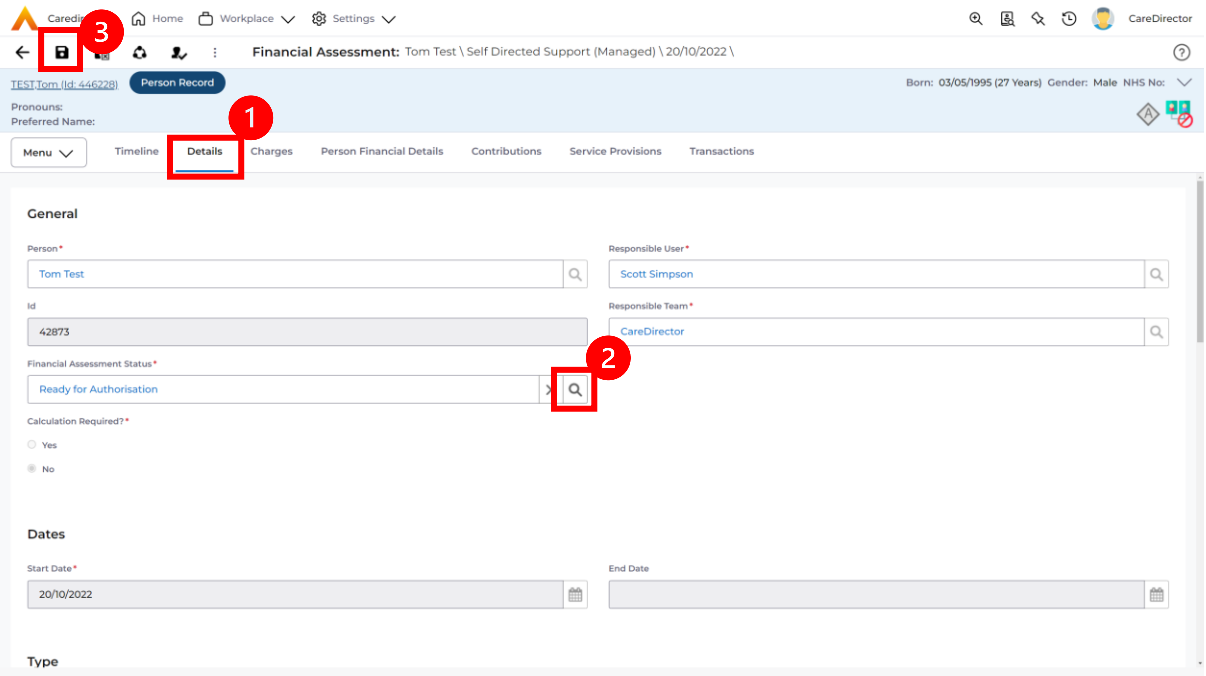
2. To check if it is calculating it correctly, select it and look through the **Charge Explanation.**



How to Change Financial Assessment Status

1. Once everything is inputted and you are happy with the **Charge**. The **Financial Assessment** is **Ready for Authorisation**.

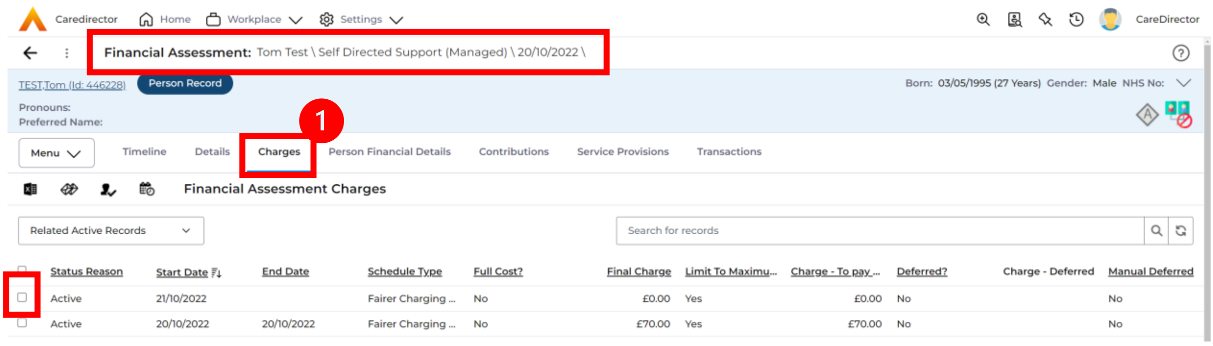
2. Select the **Details** tab and scroll down the **Financial Assessment Status** field. Then using the lookup function change it to **Ready for Authorisation**.



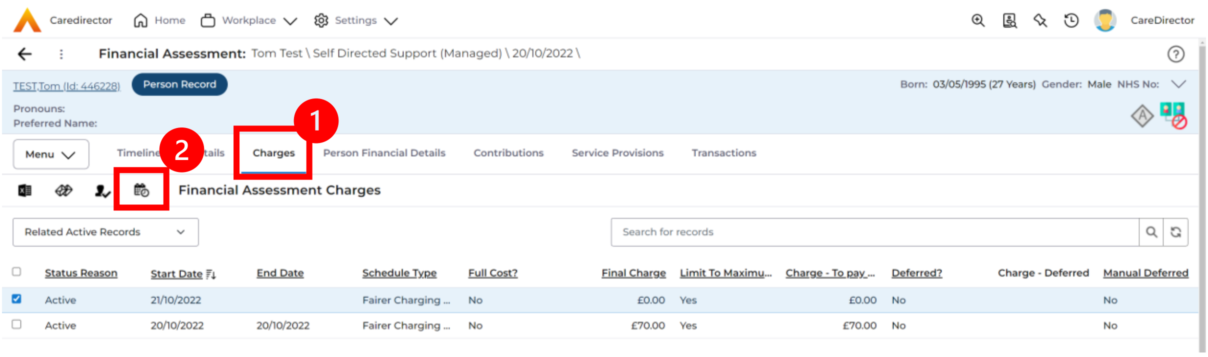
3. Then select **Save.** This will send an **Activity** through to the manager to **Authorise**.

How to view and print Charge Schedule

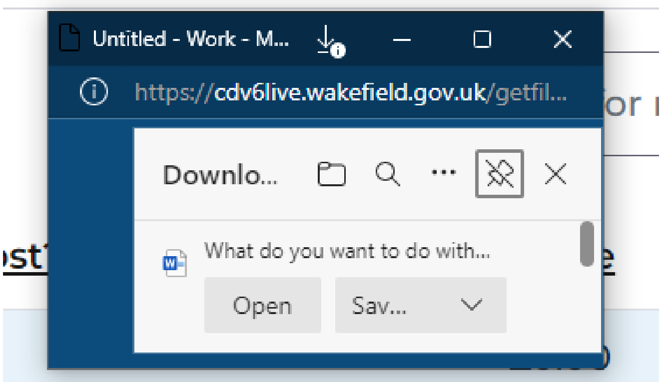
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.



2. Then select the **View Charge Schedule** on the toolbar next to **Financial Assessment Charges**.



3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.

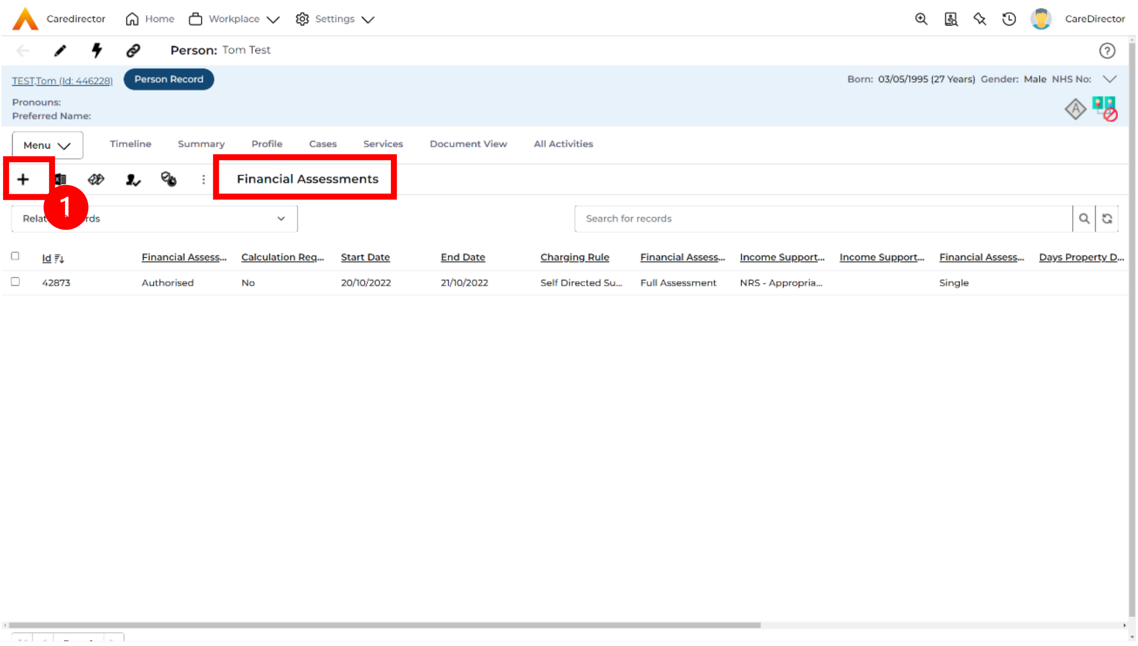


4. Once opened in **Microsoft Word** select **File, Print.**

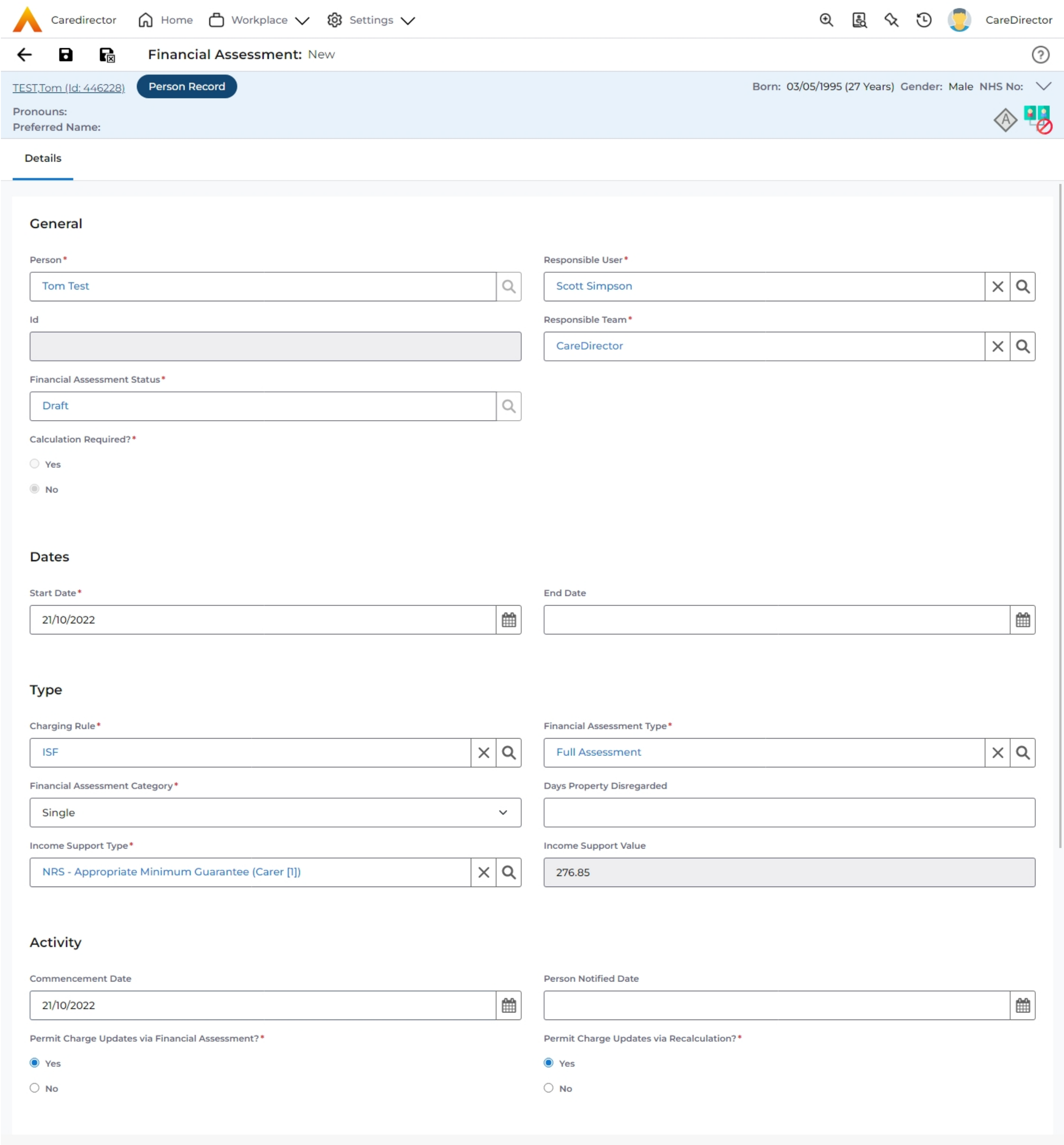
How to input a Financial Assessment ISF

Creating the Financial Assessment (ISF)

1. Locate the **Financial Assessment** record on the **Person Record**. Then select **Create New Record**.



2. Next is the information that is required:
    a. **Responsible User/ Team** choose is responsible.
    b. **Start Date** as needed.
    c. **Charging Rule** select **ISF**
    d. **Financial Assessment Type** select appropriate option**.**
    e. Under **Income Support Type** and **Financial Assessment Category** select the relevant option.
    f. Select **Yes** or **No** to the **Permit Charge Updates via Financial Assessment** and **Recalculation.**



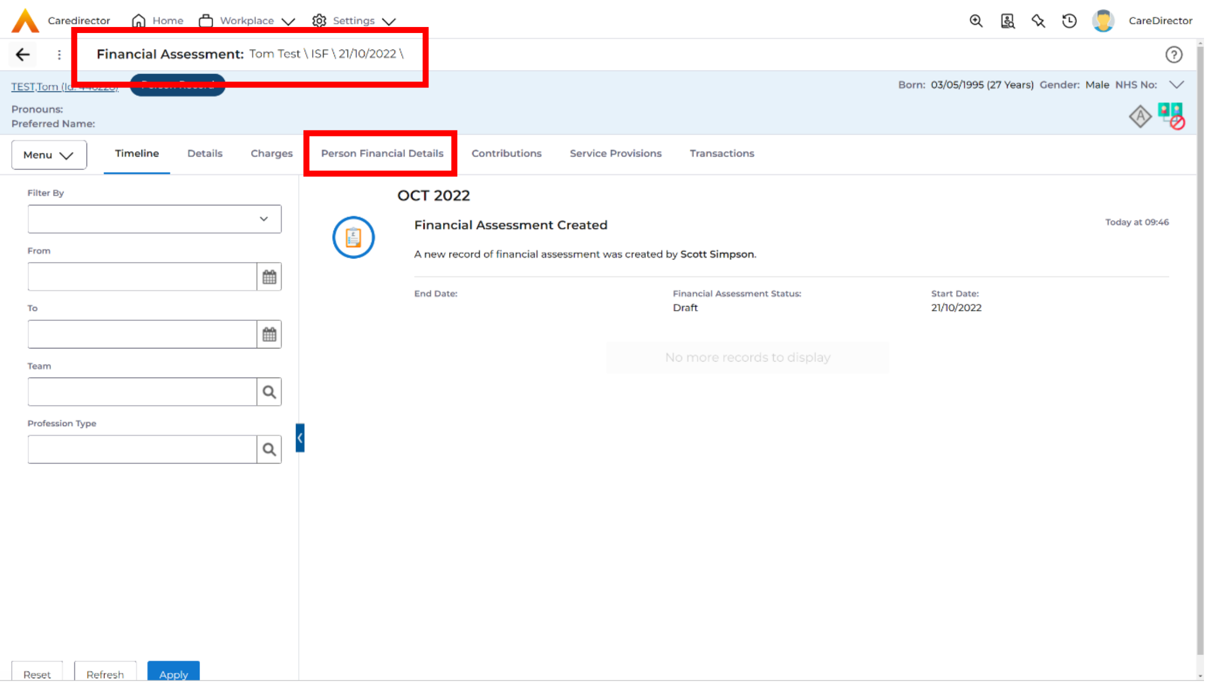
3. When finished, select **Save.**

4. Now the **Financial Assessment** for **Self-Directed Support (Managed Account)** requires more personal information.

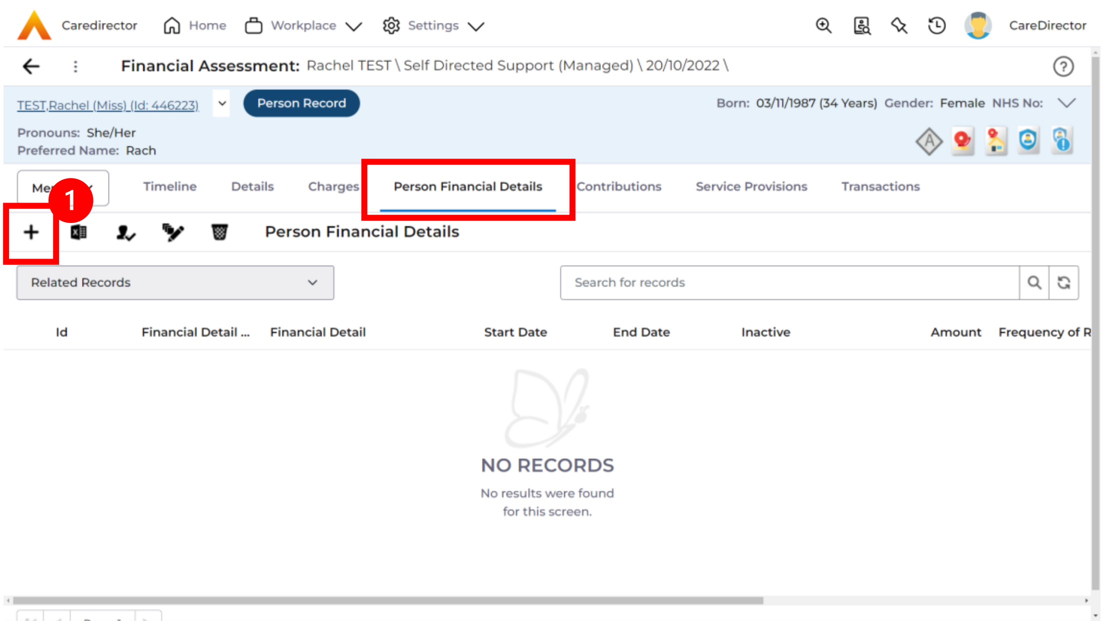
Entering Personal Information

1. This requires knowledge of **Benefits & Income**, **Assets**, **Allowable Expenses** of the **Service User**.

2. After you have **Saved** the **Financial Assessment** or relocated it. You should by default be on the **Timeline** and see **Person Financial Details** as a tab.



3. Select **Person Financial Details** and then **Create New Record**.



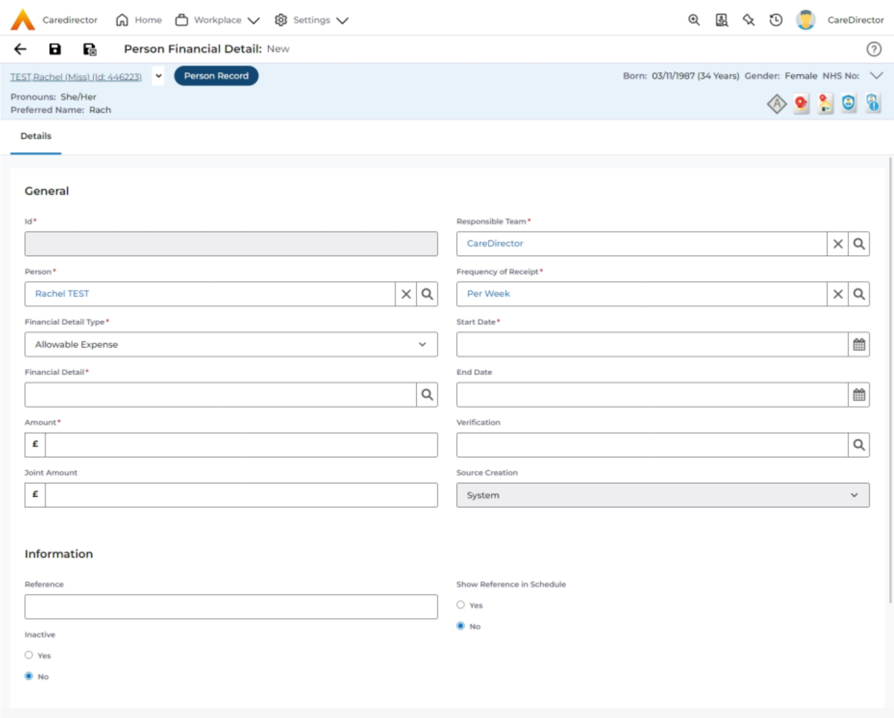
4. Requirements for this section are as followed:
    a. Leave **ID** blank (system will automatically fill this).
    b. Select the **Responsible Team**.
    c. Select the **Start Date.**
    d. **Person** will automatically be filled in.
    e. **Verification** is the proof that you have seen to provide this **Amount** and **Financial Detail Type.**

5. **Financial Detail Type** splits into 4:
    a. **Allowable Expense**
    b. **Asset**
    c. **Benefit & Income**
    d. **Property**

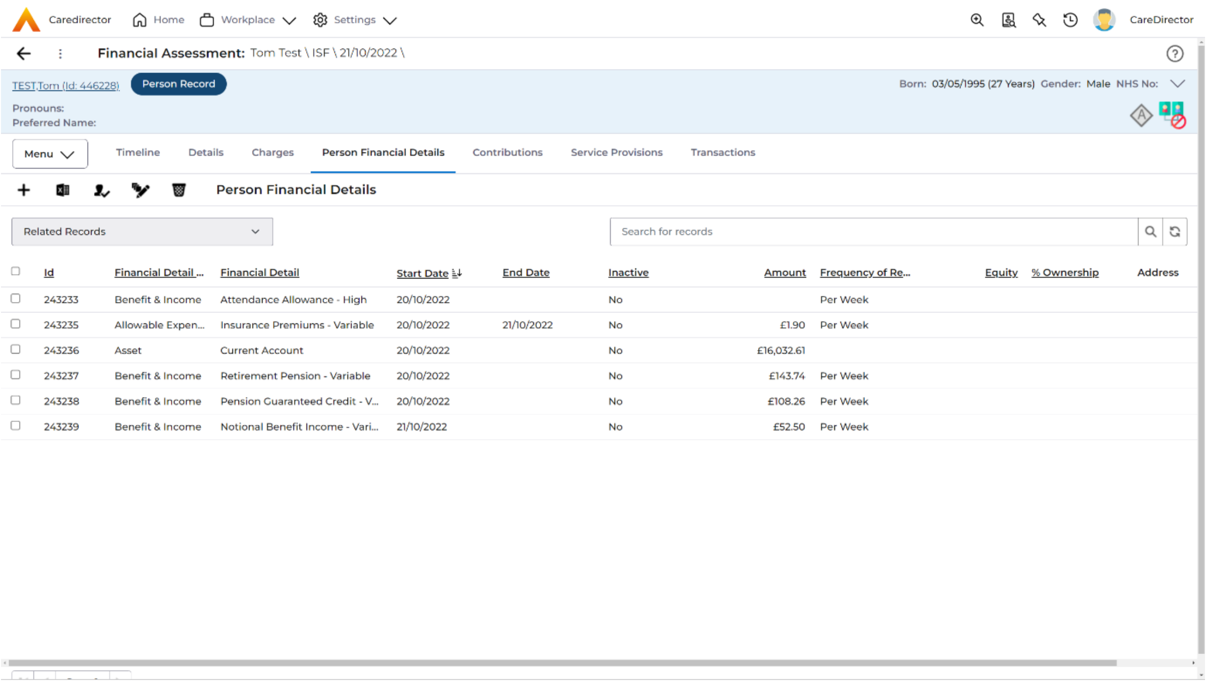
6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

7. **Amount** is how much that individual **Financial Detail Type** is. Some are entered in by the system automatically.

8. When finished, select **Save**. Fill out another **Person Financial Detail** if required.

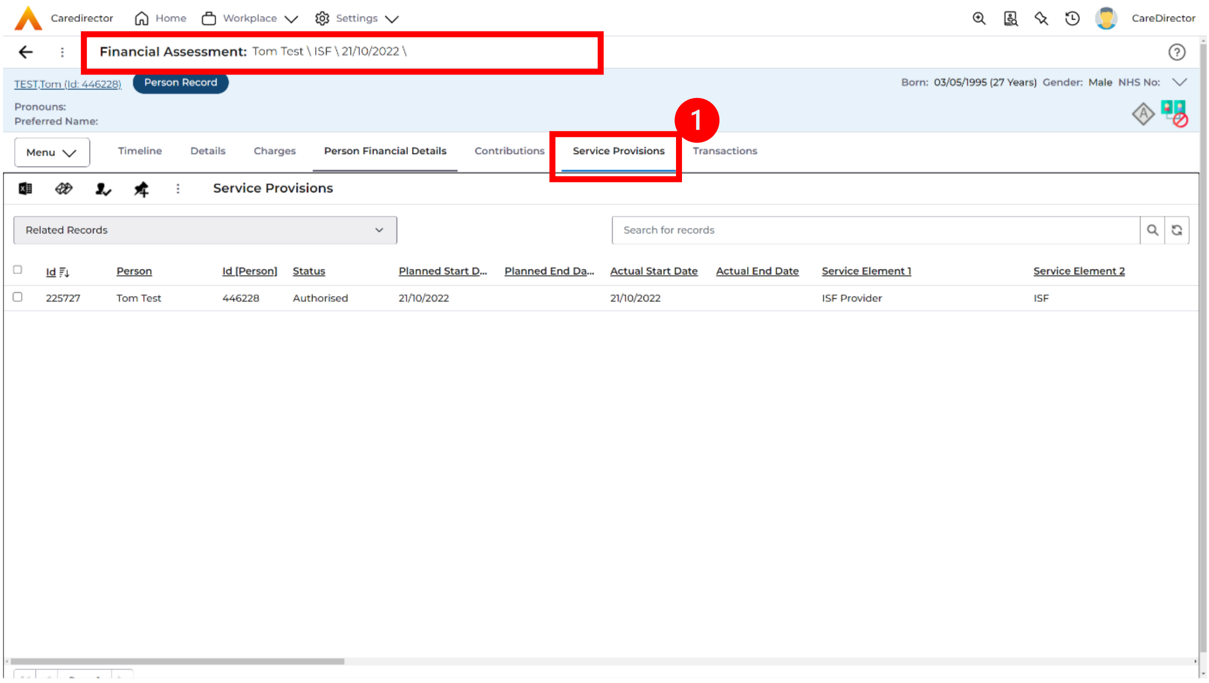


9. When saved and completed as many times as required, it will look like this.



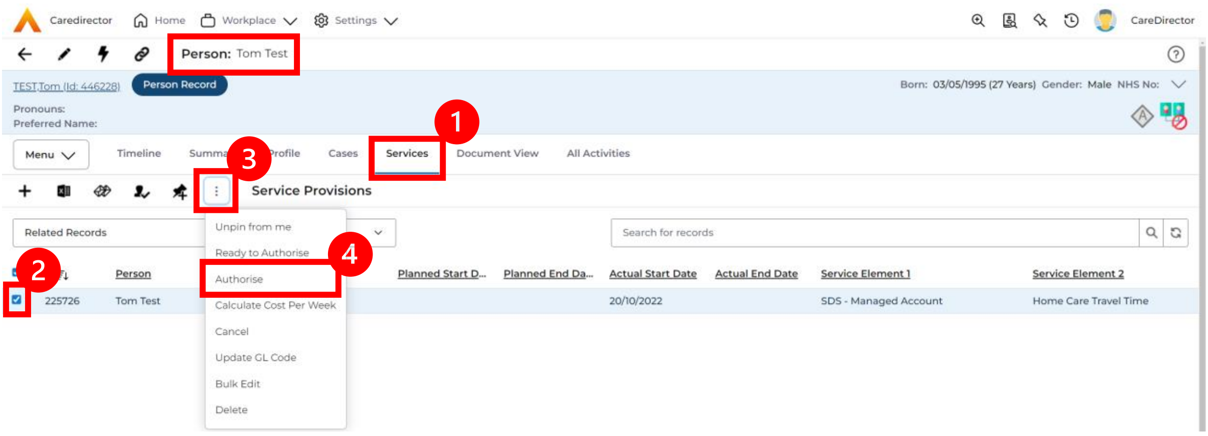
Ensure Service Provisions are linked (How to Authorise Service Provisions)

1. Ensure your **Service Provision** is linked by going to the **Service Provisions** tab on the **Financial Assessment.**



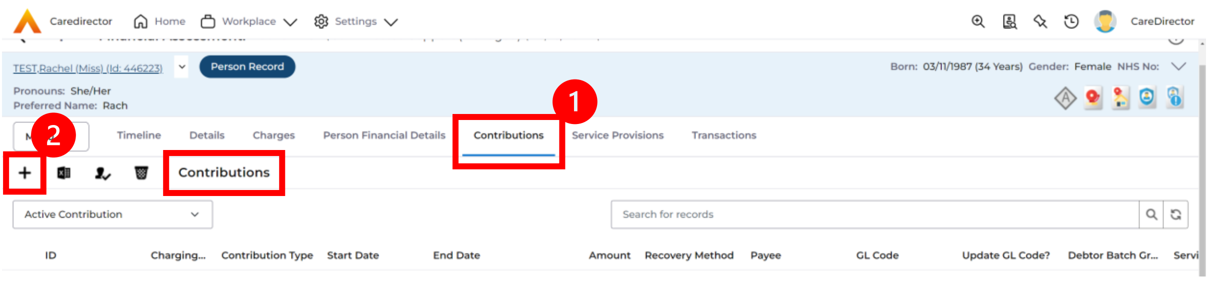
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised.** You will need to refresh your page if so.

3. **To Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

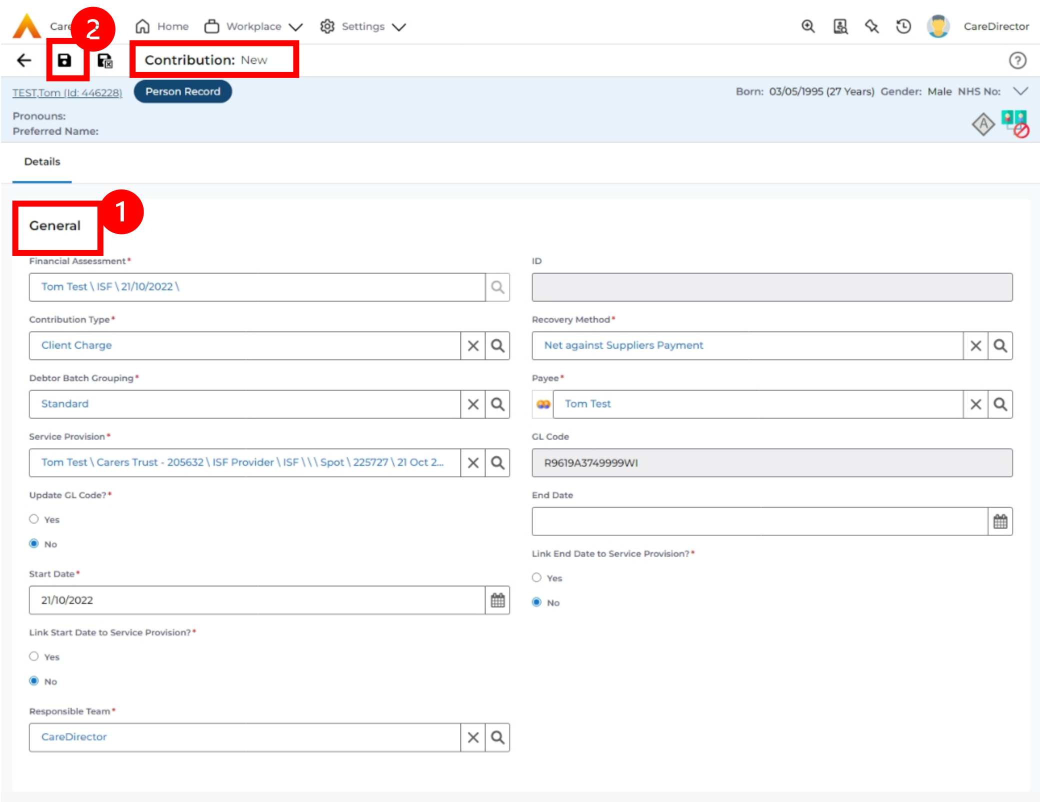


Contributions

1. When **Entering Personal Information** has been completed, we need to include **Contributions**. Locate the **Financial Assessment**, select the **Contributions** tab. Then select **Create New Record**.

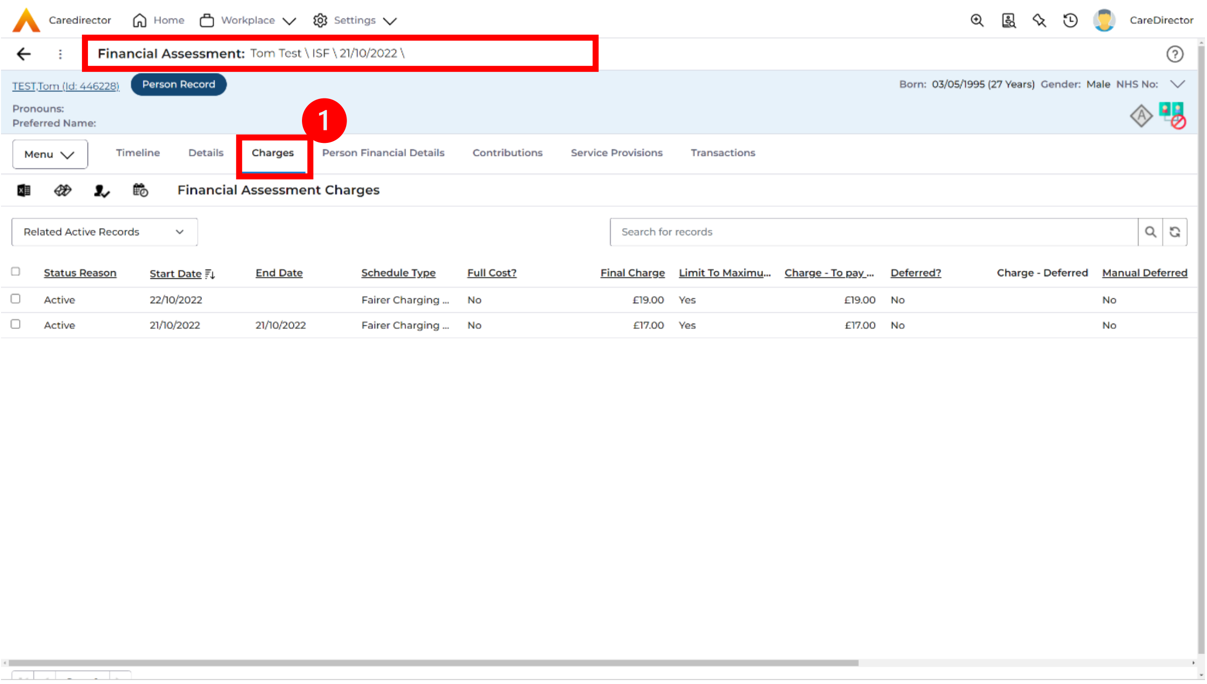


2. Fill in the relevant information. When finished, select **Save.**

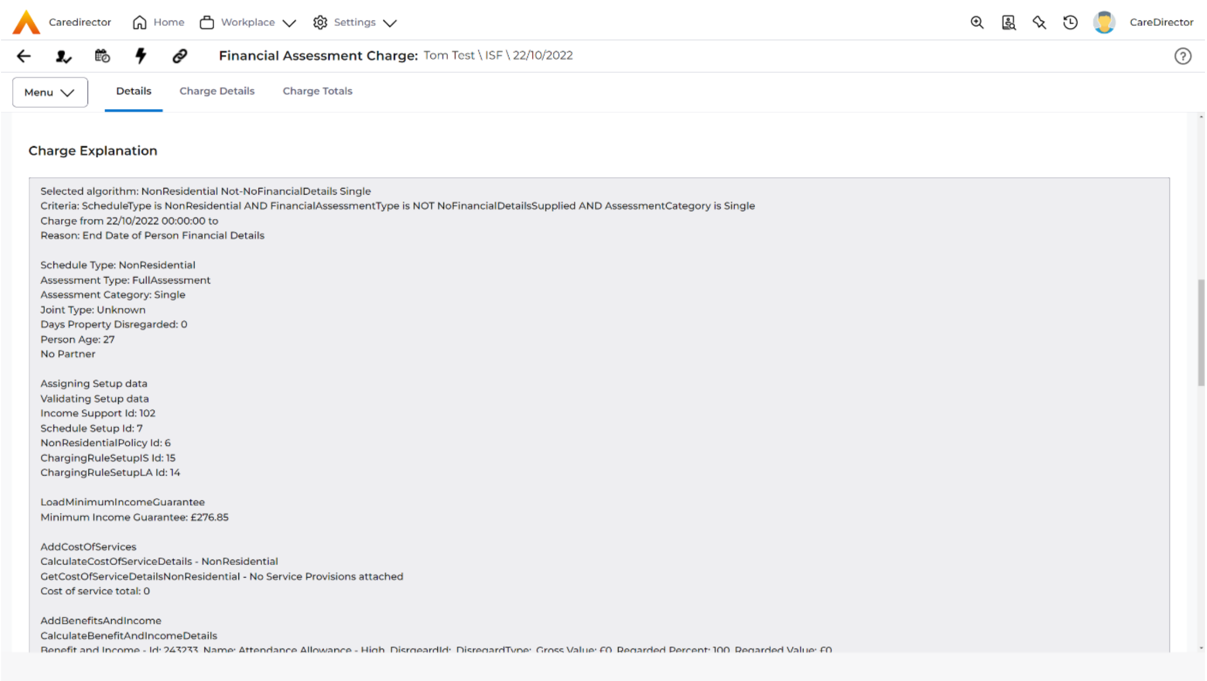


Calculate Charges

1. To check if the **Charges** are being calculated, select the **Charges** tab. This will show the **Final Charge**.



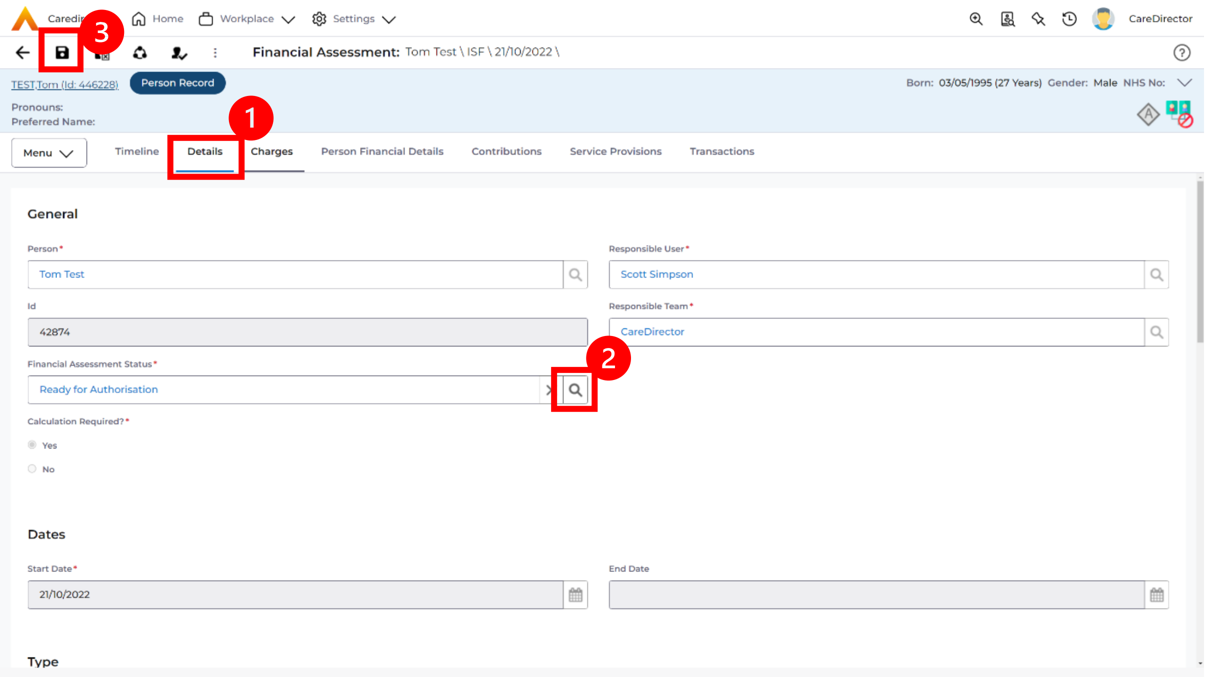
2. To check if it is calculating it correctly, select it and look through the **Charge Explanation.**



How to Change Financial Assessment Status

1. Once everything is inputted and you are happy with the **Charge**. The **Financial Assessment** is **Ready for Authorisation**.

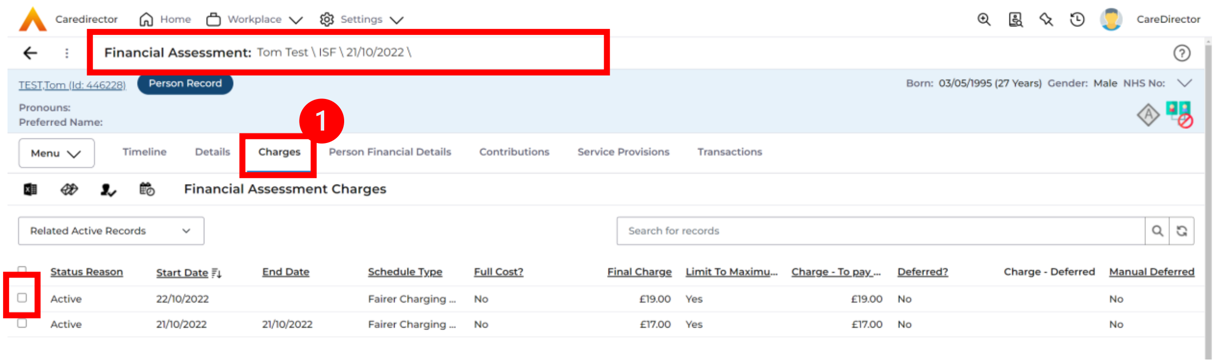
2. Select the **Details** tab and scroll down the **Financial Assessment Status** field. Then using the lookup function change it to **Ready for Authorisation**.



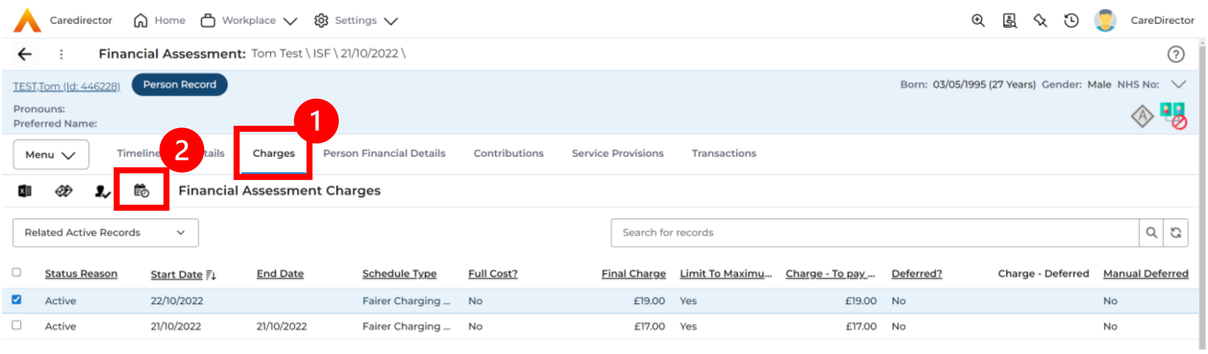
3. Then select **Save.** This will send an **Activity** through to the manager to **Authorise**.

How to view and print Charge Schedule

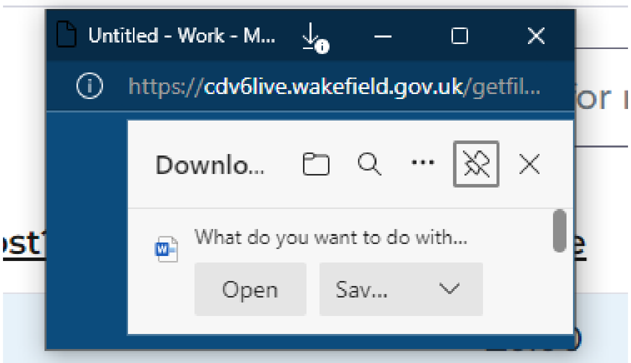
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.



2. Then select the **View Charge Schedule** on the toolbar next to **Financial Assessment Charges**.



3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.

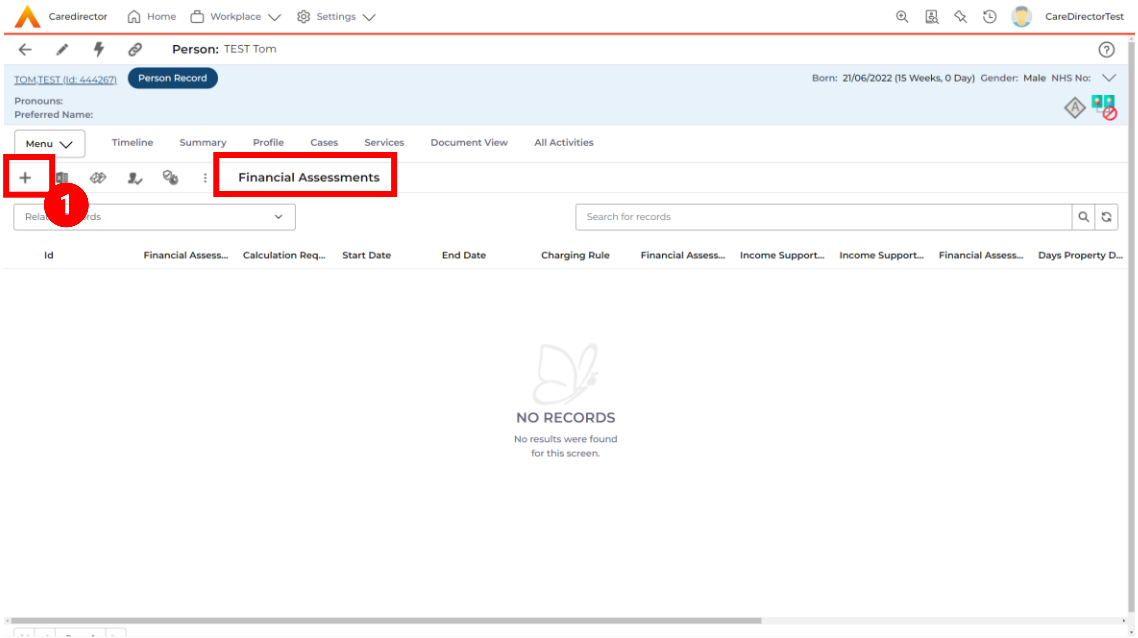


4. Once opened in **Microsoft Word** select **File, Print.**

How to input a Financial Assessment Cash Budget

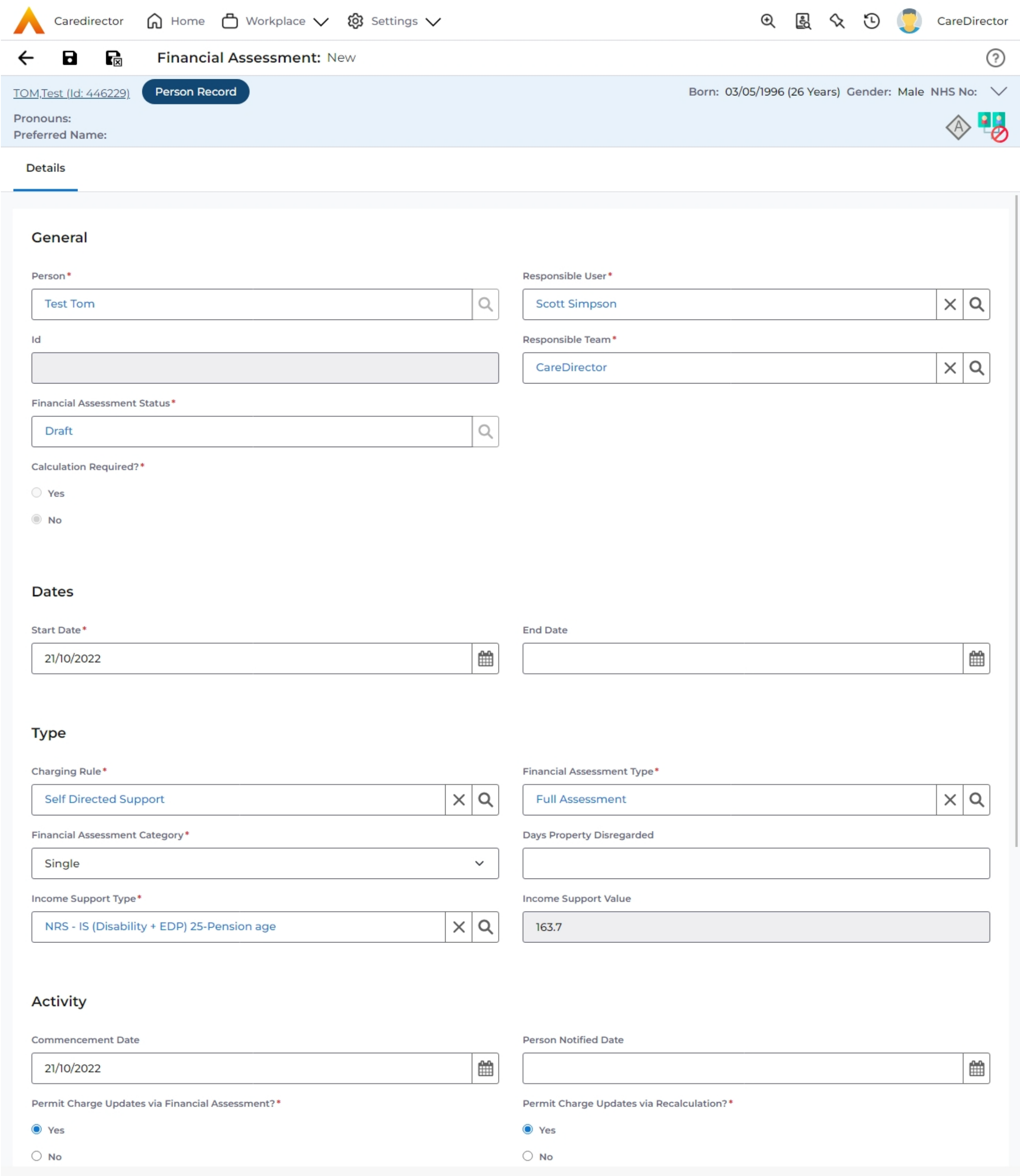
Creating the Financial Assessment (Cash Budget)

1. Locate the **Financial Assessment** record on the **Person Record**. Then select **Create New Record**.



2. Next is the information that is required:
   a. **Responsible User/ Team** choose is responsible.
   b. **Start Date** as needed.
   c. **Charging Rule** select **Self Directed Support.**
   d. **Financial Assessment Type** select appropriate option**.**
   e. Under **Income Support Type** and **Financial Assessment Category** select the relevant option.
   f. Select **Yes** or **No** to the **Permit Charge Updates via Financial Assessment** and **Recalculation.**

3. When finished, select **Save.**

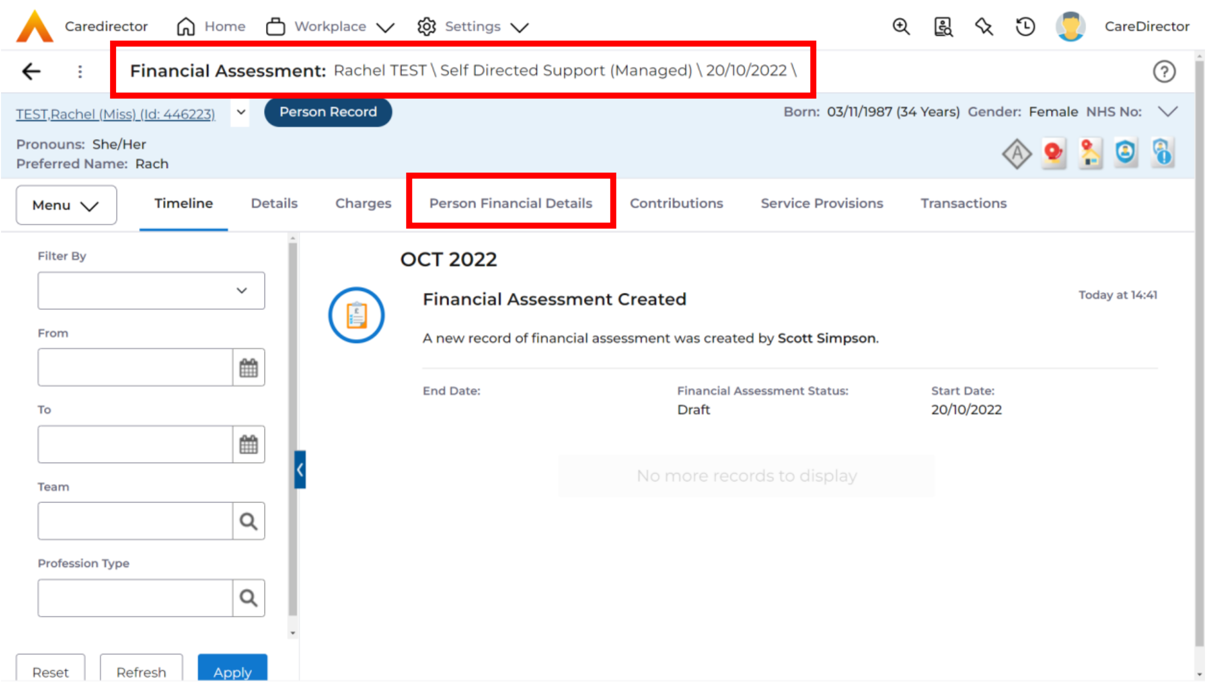


4. Now the **Financial Assessment** for **Self-Directed Support** requires more personal information.

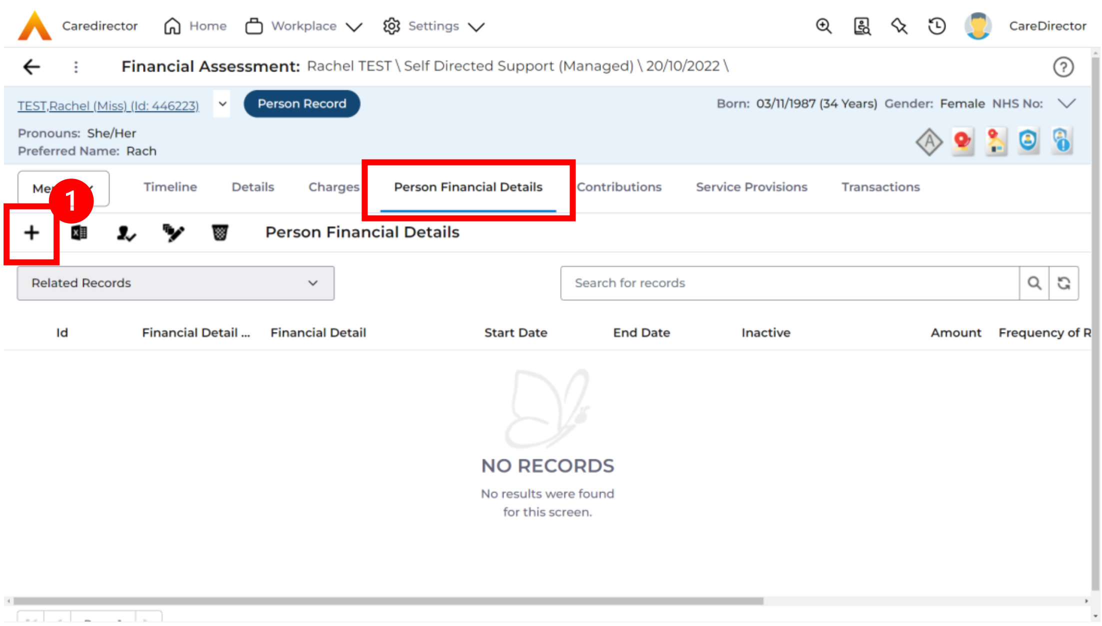
Entering Personal Information

1. This requires knowledge of **Benefits & Income**, **Assets**, **Allowable Expenses** of the **Service User**.

2. After you have **Saved** the **Financial Assessment** or relocated it. You should by default be on the **Timeline** and see **Person Financial Details** as a tab.



3. Select **Person Financial Details** and then **Create New Record**.



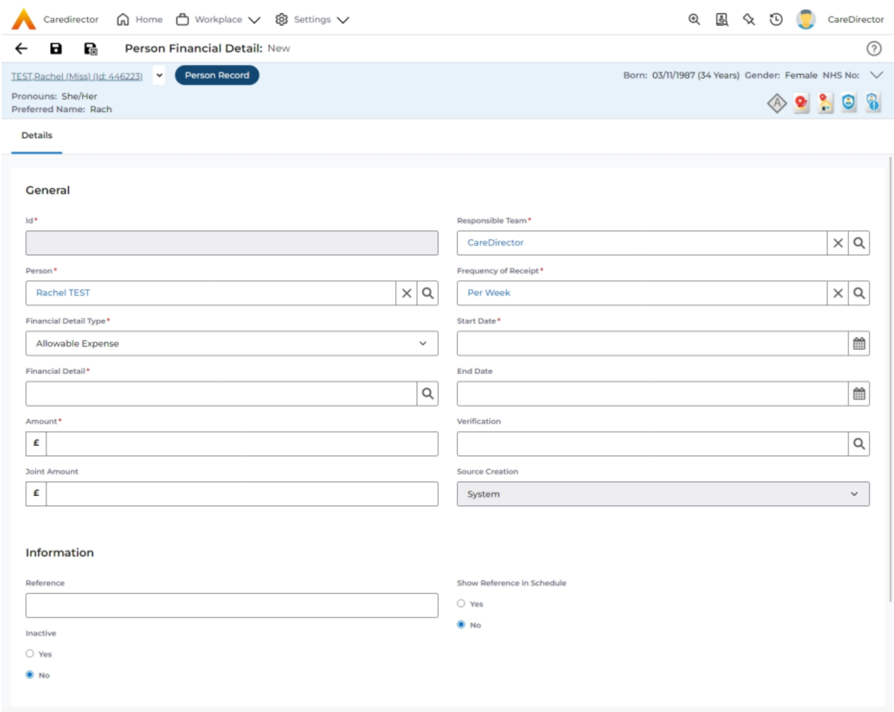
4. Requirements for this section are as followed:
    a. Leave **ID** blank (system will automatically fill this).
    b. Select the **Responsible Team**.
    c. Select the **Start Date.**
    d. **Person** will automatically be filled in.
    e. **Verification** is the proof that you have seen to provide this **Amount** and **Financial Detail Type.**

5. **Financial Detail Type** splits into 4:
    a. **Allowable Expense**
    b. **Asset**
    c. **Benefit & Income**
    d. **Property**

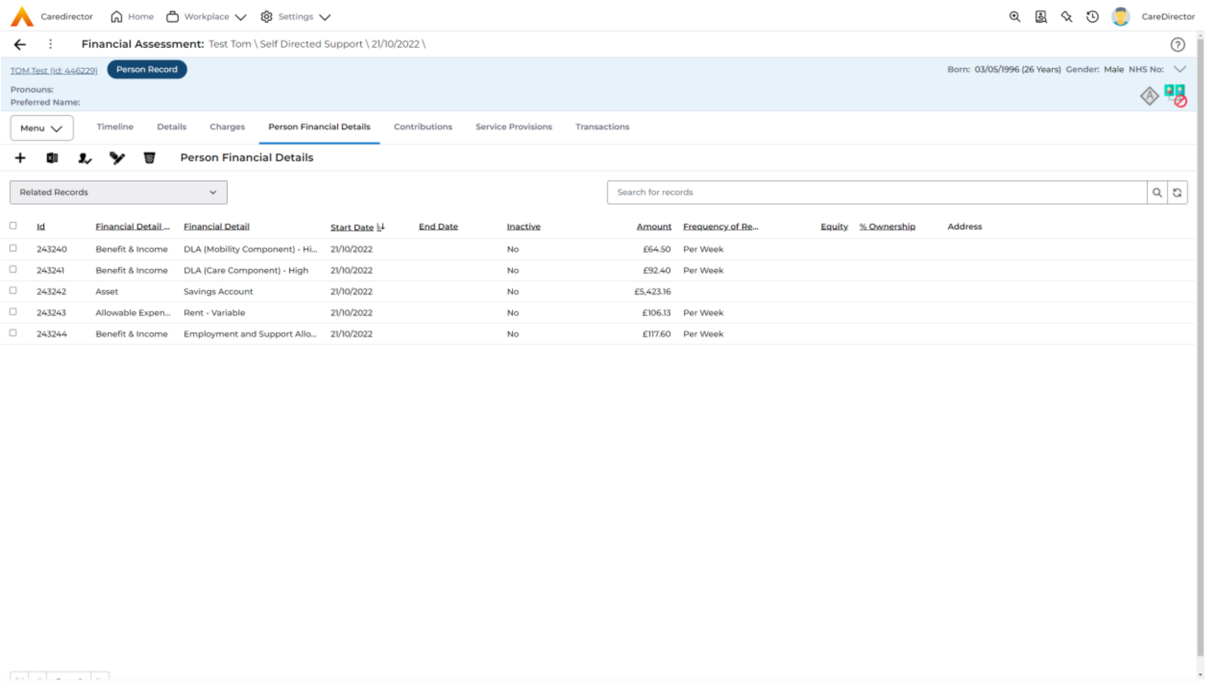
6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

7. **Amount** is how much that individual **Financial Detail Type** is.

8. When finished, select **Save**. Fill out another **Person Financial Detail** if required.

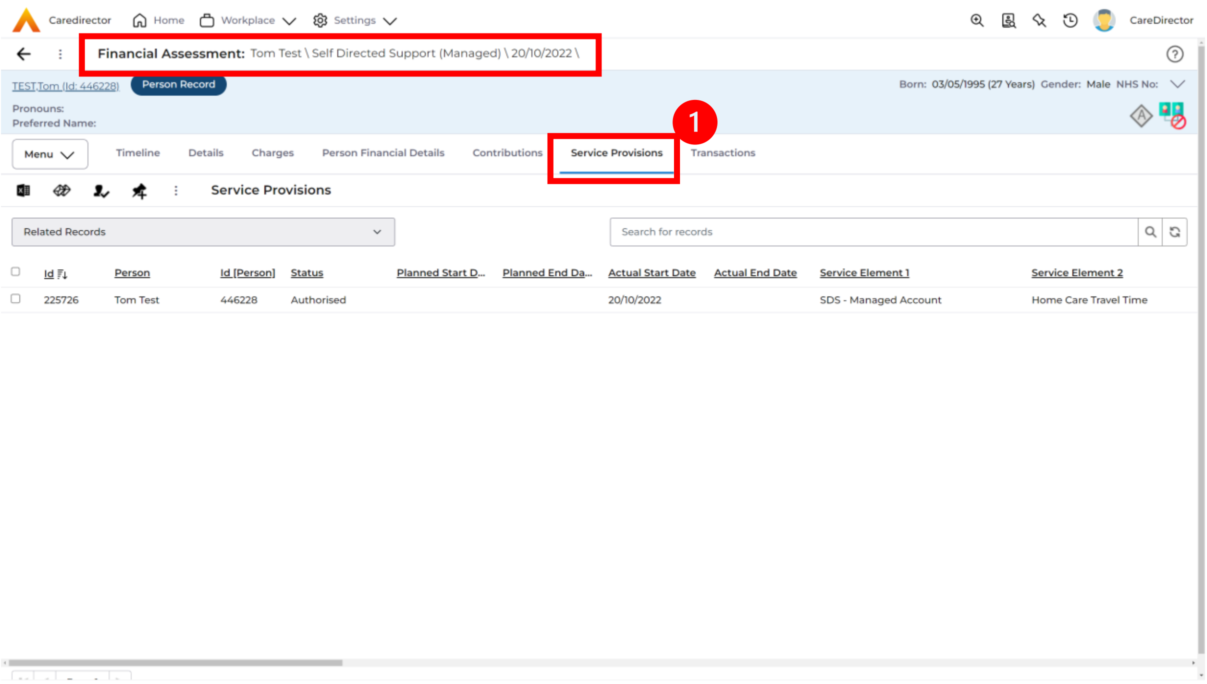


9. When saved and completed as many times as required, it will look like this.


Caredirector
Home
Workplace
Settings
CareDirector
Financial Assessment: Test Tom \ Self Directed Support \ 21/10/2022 \
TOM Test (Id: 446229)
Person Record
Born: 03/05/1996 (26 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Menu
Timeline
Details
Charges
Person Financial Details
Contributions
Service Provisions
Transactions
Person Financial Details
Related Records
Search for records
Id
Financial Detail ...
Financial Detail
Start Date
End Date
Inactive
Amount
Frequency of Re...
Equity
% Ownership
Address
243240 Benefit & Income DLA (Mobility Component) - Hi... 21/10/2022 No £64.50 Per Week
243241 Benefit & Income DLA (Care Component) - High 21/10/2022 No £92.40 Per Week
243242 Asset Savings Account 21/10/2022 No £5,423.16
243243 Allowable Expen... Rent - Variable 21/10/2022 No £106.13 Per Week
243244 Benefit & Income Employment and Support Allo... 21/10/2022 No £117.60 Per Week

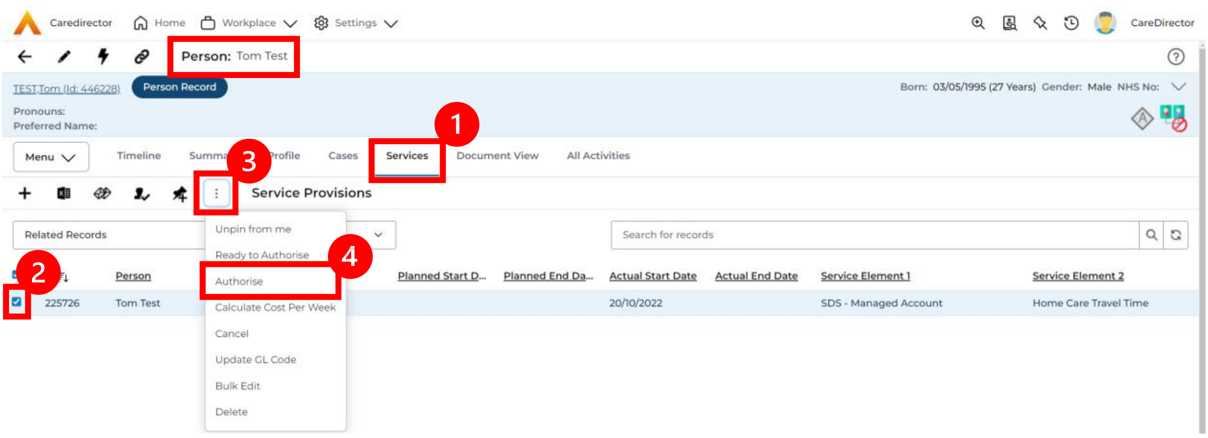
Ensure Service Provisions are linked (How to Authorise Service Provisions)

1. Ensure your **Service Provision** is linked by going to the **Service Provisions** tab on the **Financial Assessment.**



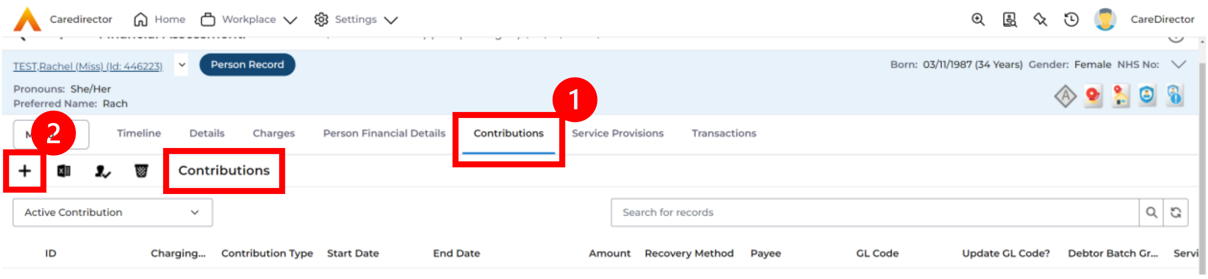
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised.** You will need to refresh your page if so.

3. **To Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

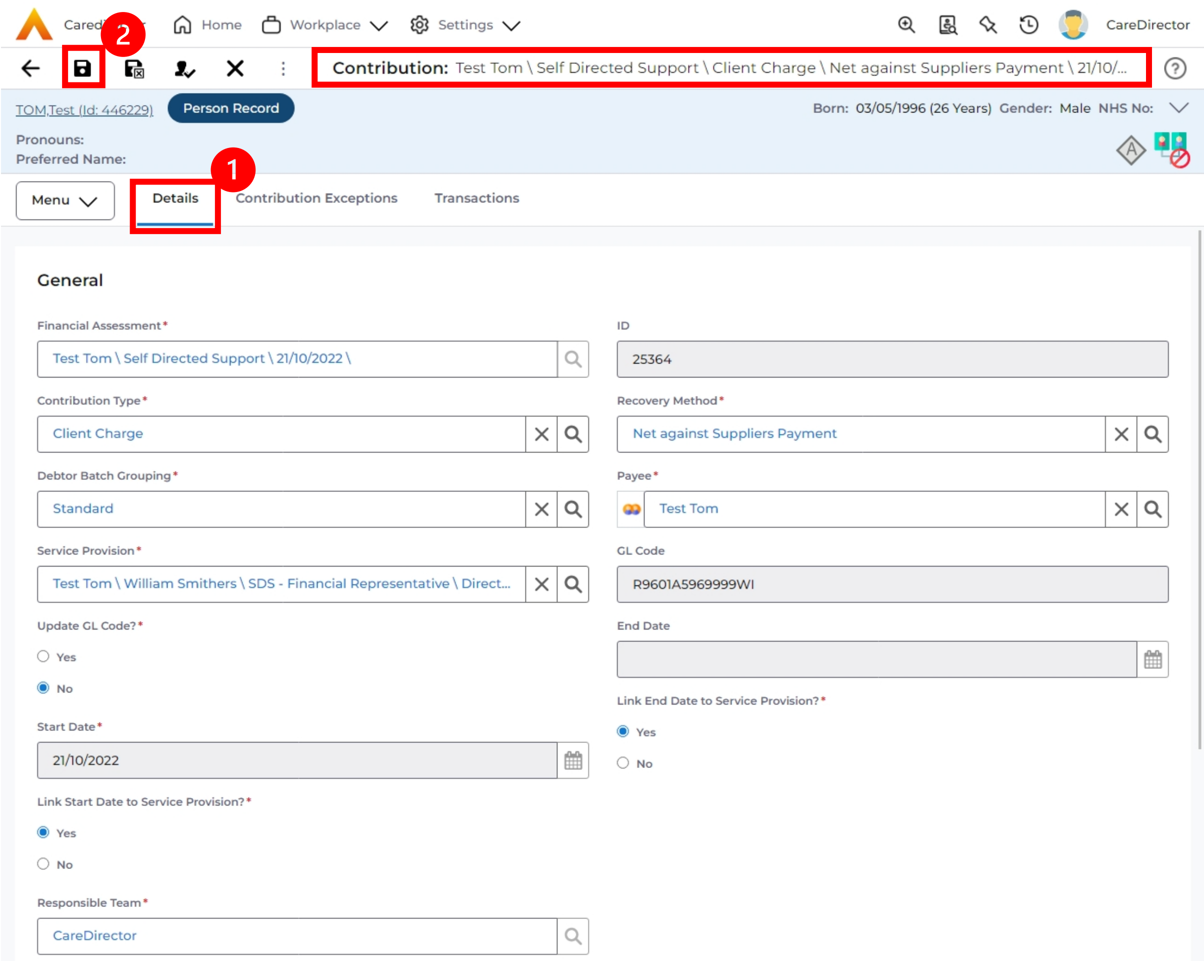


Contributions

1. When **Entering Personal Information** has been completed, we need to include **Contributions**. Locate the **Financial Assessment**, select the **Contributions** tab. Then select **Create New Record**.



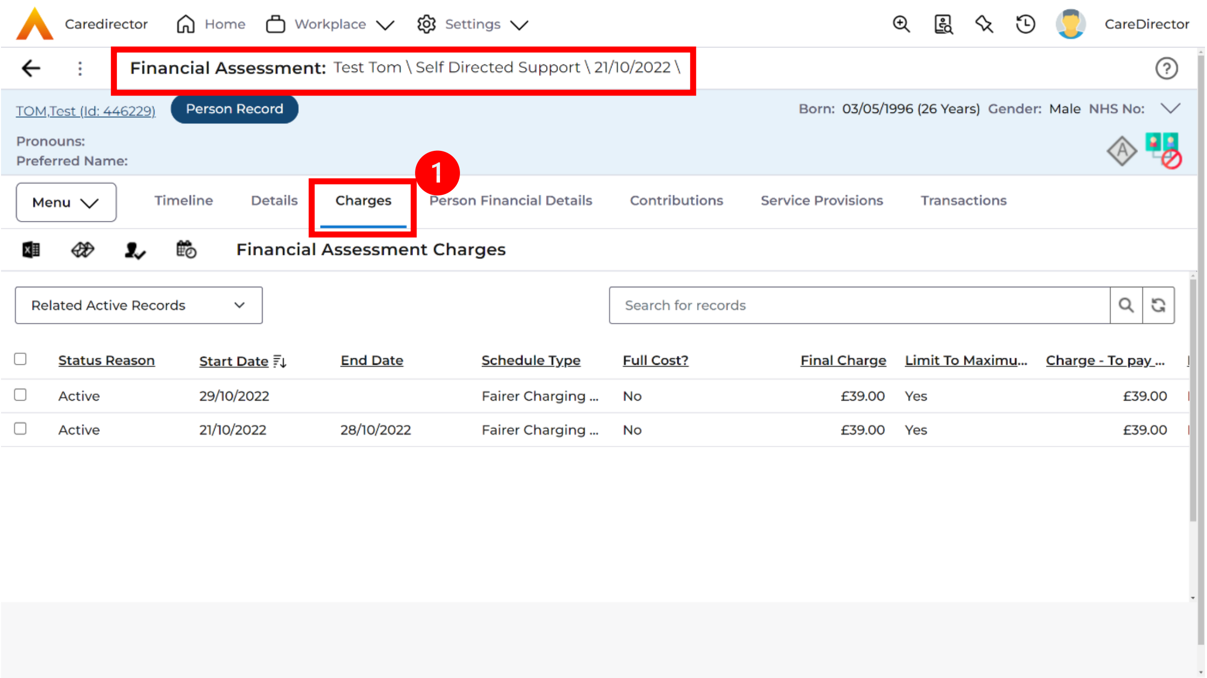
2. Fill in the relevant information. Ensure your **Service Provision** is **Authorised** as the **Service Provision** will not show. When finished, select **Save.**



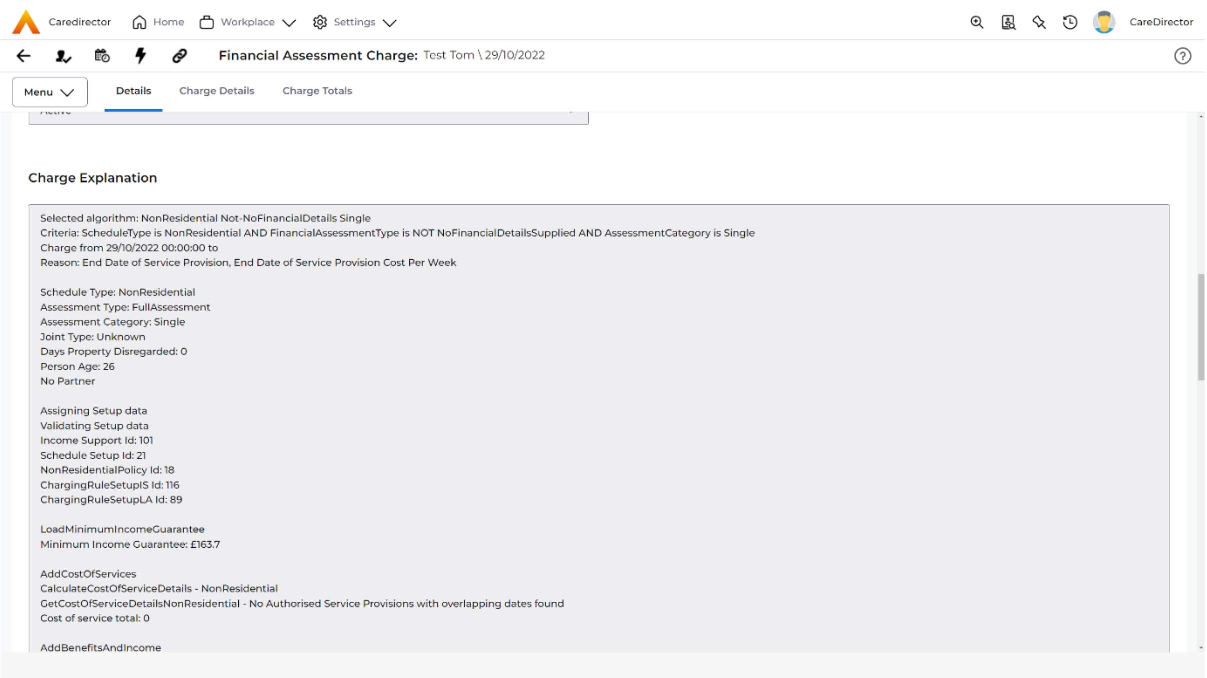
3. **Link Start/ End Date to Service Provision** if needed.

Calculate Charges

1. To check if the **Charges** are being calculated, select the **Charges** tab. This will show the **Final Charge**.



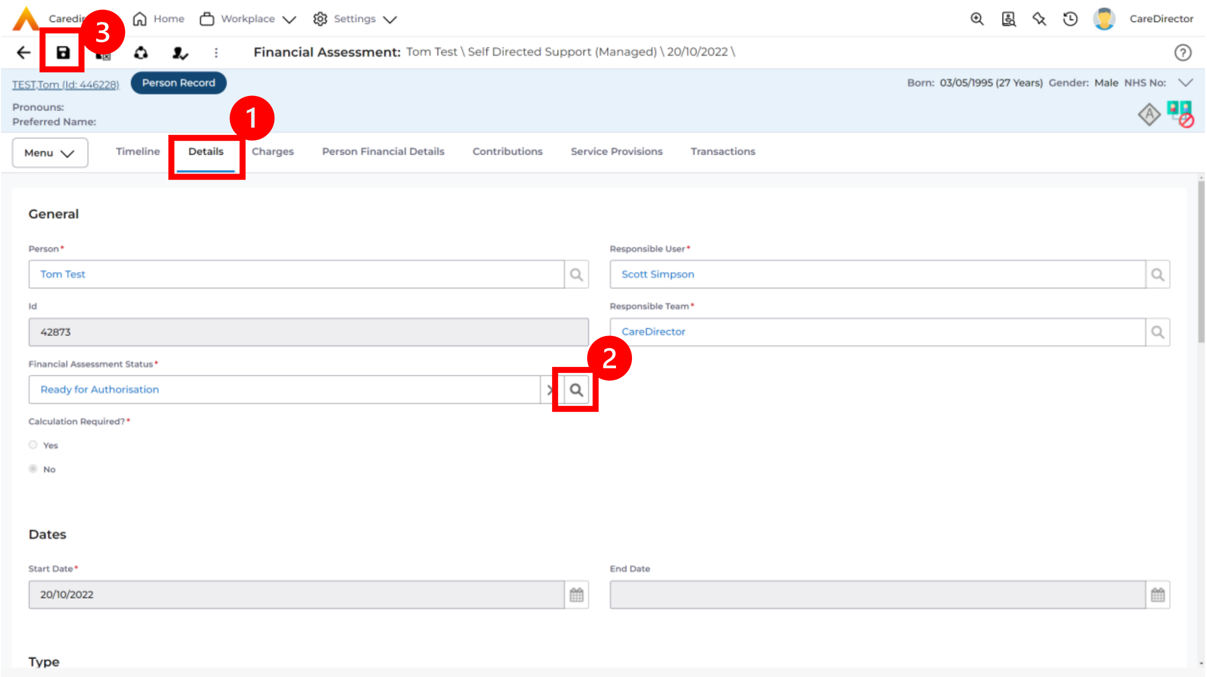
2. To check if it is calculating it correctly, select it and look through the **Charge Explanation.**



How to Change Financial Assessment Status

1. Once everything is inputted and you are happy with the **Charge**. The **Financial Assessment** is **Ready for Authorisation**.

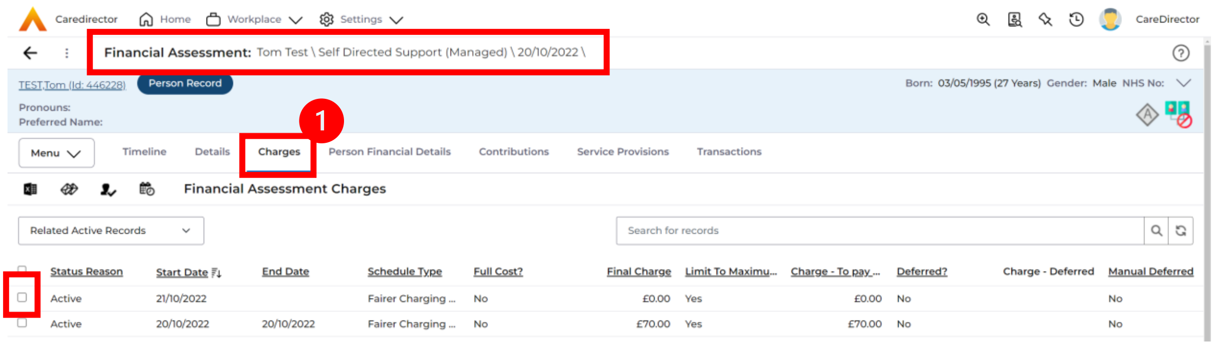
2. Select the **Details** tab and scroll down the **Financial Assessment Status** field. Then using the lookup function change it to **Ready for Authorisation**.



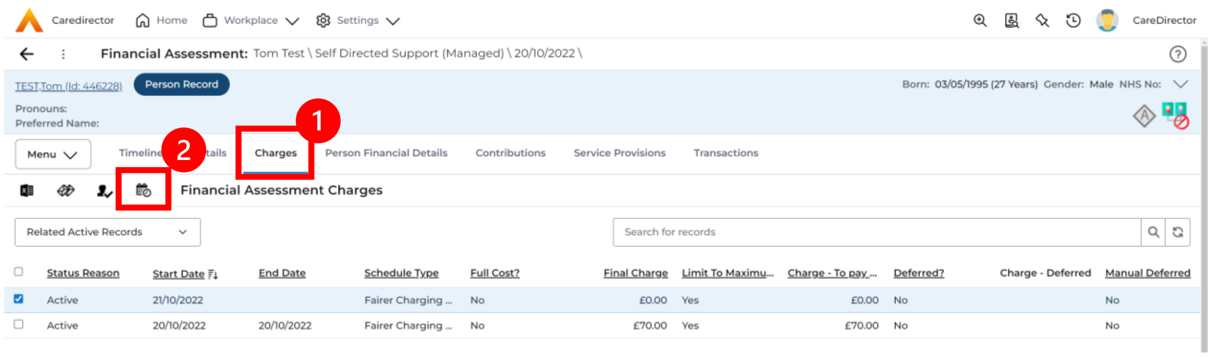
3. Then select **Save.** This will send an **Activity** through to the manager to **Authorise**.

How to view and print Charge Schedule

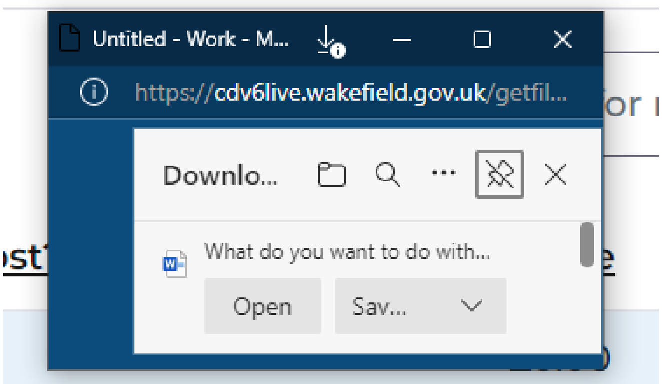
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.



2. Then select the **View Charge Schedule** on the toolbar next to **Financial Assessment Charges**.



3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.



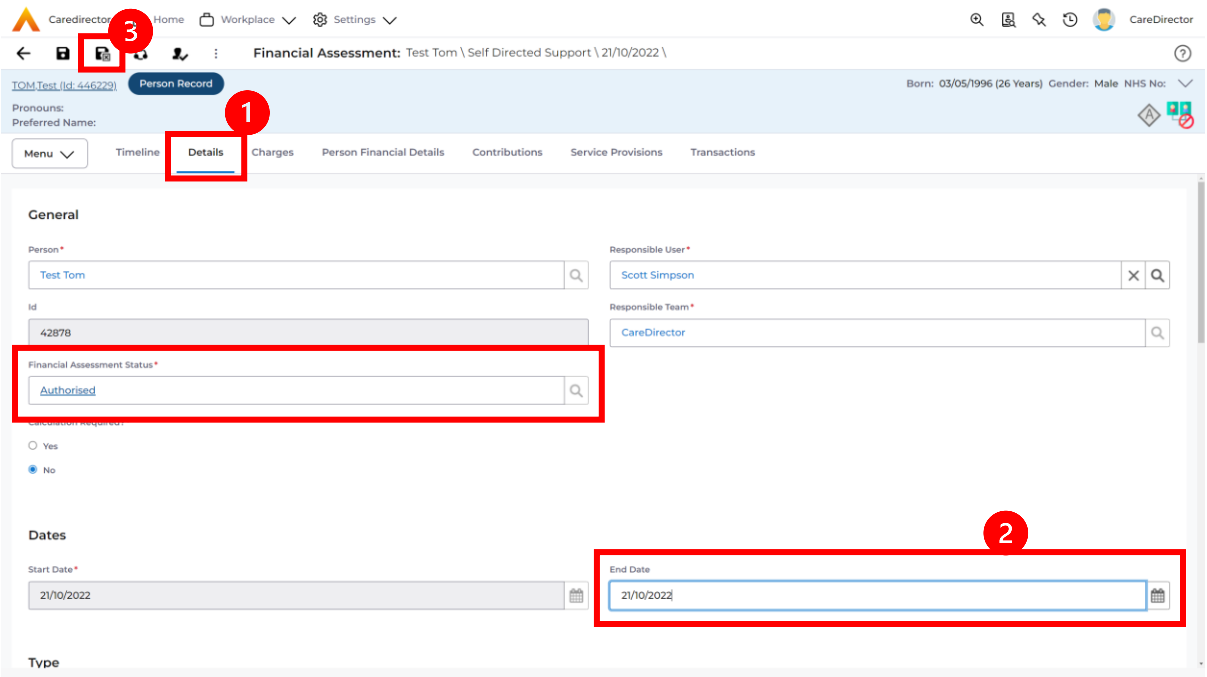
4. Once opened in **Microsoft Word** select **File, Print.**

How to input a Financial Assessment Residential

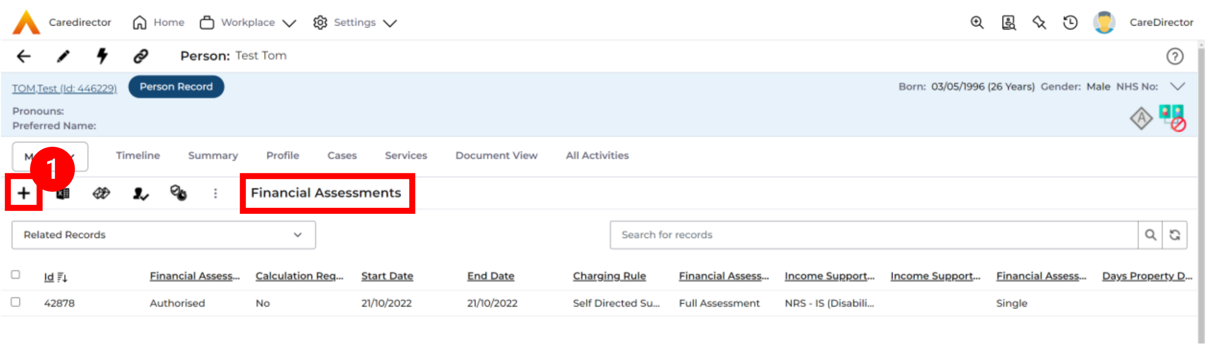
Creating the Financial Assessment (Residential)

1. Creating a **Residential Financial Assessment** requires an **Interim FA** following the receipt of **Case** and recording a **Full Cost Service Provision**. When creating the **Residential Permanent Stay** ensure the **Start Date** is the same as the **End Date** of previous **FA**.

2. Locate the **Financial Assessment** record on the **Person Record** ensure the old **Financial Assessment** has an **End Date**. If it doesn't open the **Financial Assessment** and scroll down to **End Date,** enter one and then **Save and Return to Previous Page.**

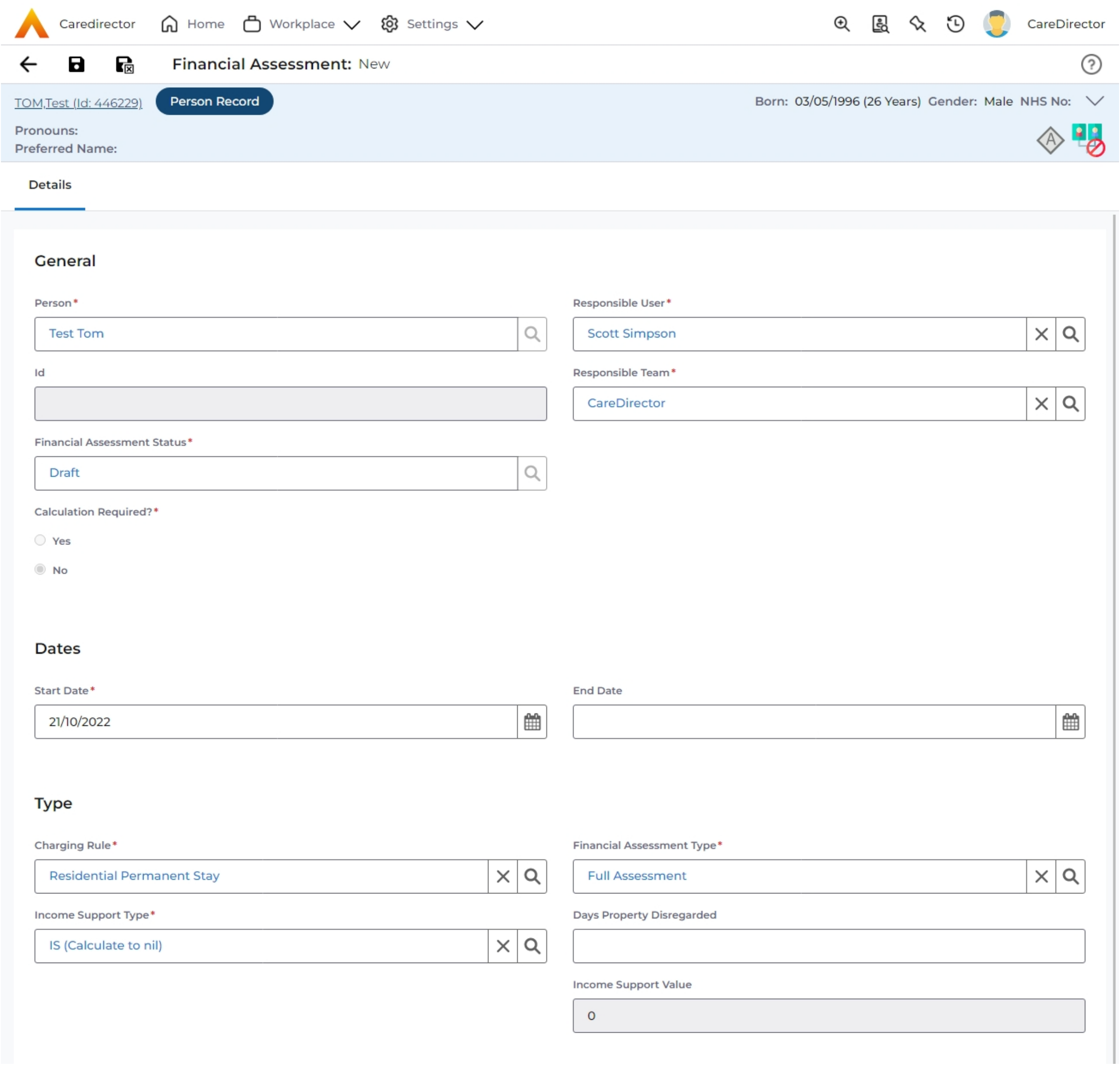


3. Next, go back to the **Financial Assessment** screen and **Create New Record.**



4. Next is the information that is required:
    a. **Responsible User/ Team** choose is responsible.
    b. **Start Date** as needed.
    c. **Charging Rule** select **Residential Permanent Stay.**
    d. **Financial Assessment Type** select appropriate option**.**
    e. Under **Income Support Type** select the relevant option.
    f. Select **Yes** or **No** to the **Permit Charge Updates via Financial Assessment** and **Recalculation.**

5. When finished, select **Save.**

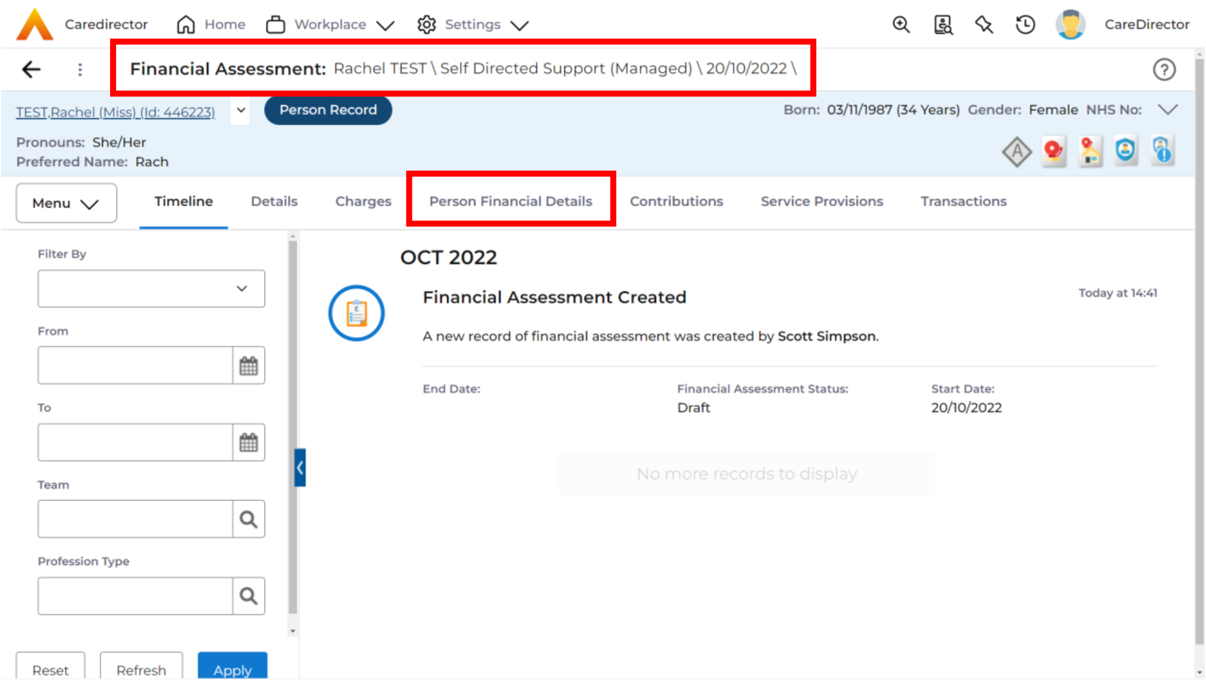


6. Now the **Financial Assessment** for **Residential Permanent Stay** requires more personal information.

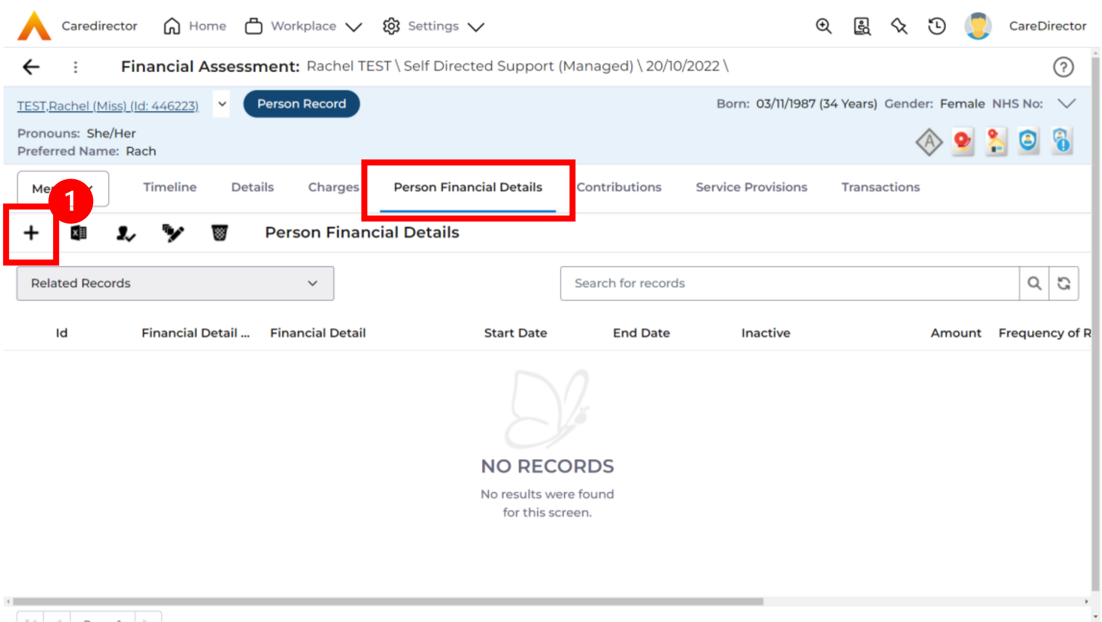
Entering Personal Information

1. This requires knowledge of **Benefits & Income**, **Assets**, **Allowable Expenses** of the **Service User**.

2. After you have **Saved** the **Financial Assessment** or relocated it. You should by default be on the **Timeline** and see **Person Financial Details** as a tab.



3. Select **Person Financial Details** and then **Create New Record**.



4. Requirements for this section are as followed:
    a. Leave **ID** blank (system will automatically fill this).
    b. Select the **Responsible Team**.
    c. Select the **Start Date.**
    d. **Person** will automatically be filled in.
    e. **Verification** is the proof that you have seen to provide this **Amount** and **Financial Detail Type.**

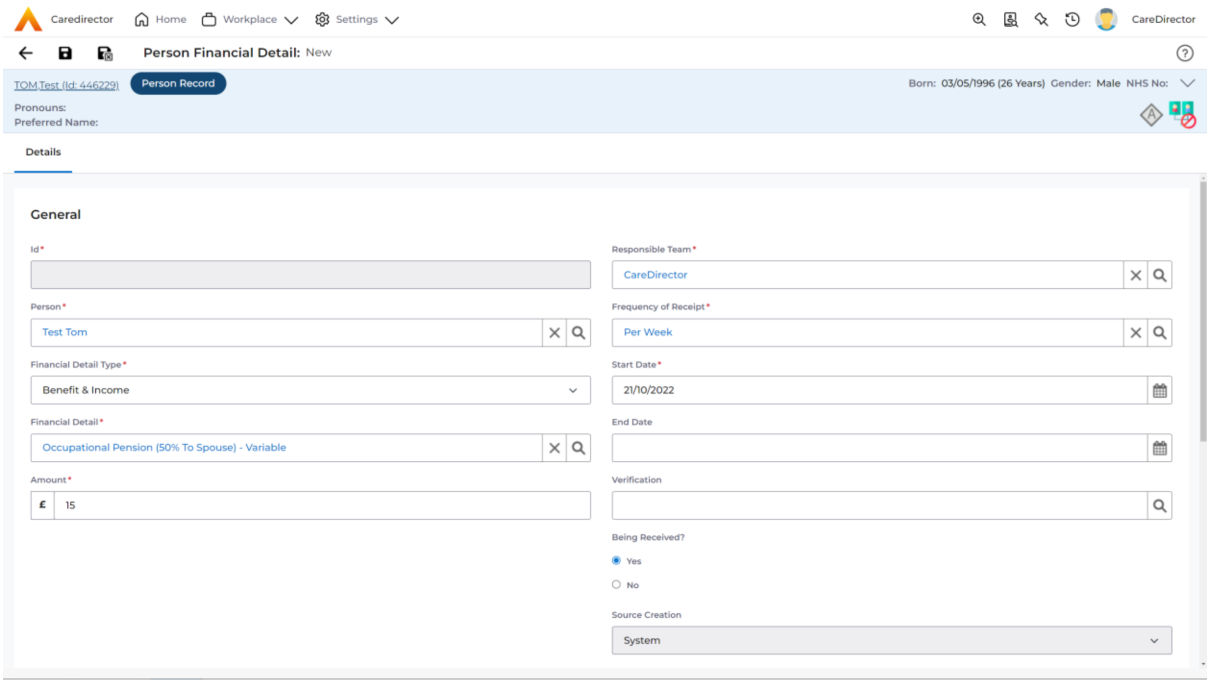
5. **Financial Detail Type** splits into 4:
    a. **Allowable Expense**
    b. **Asset**
    c. **Benefit & Income**
    d. **Property**

6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

7. **Amount** is how much that individual **Financial Detail Type** is.

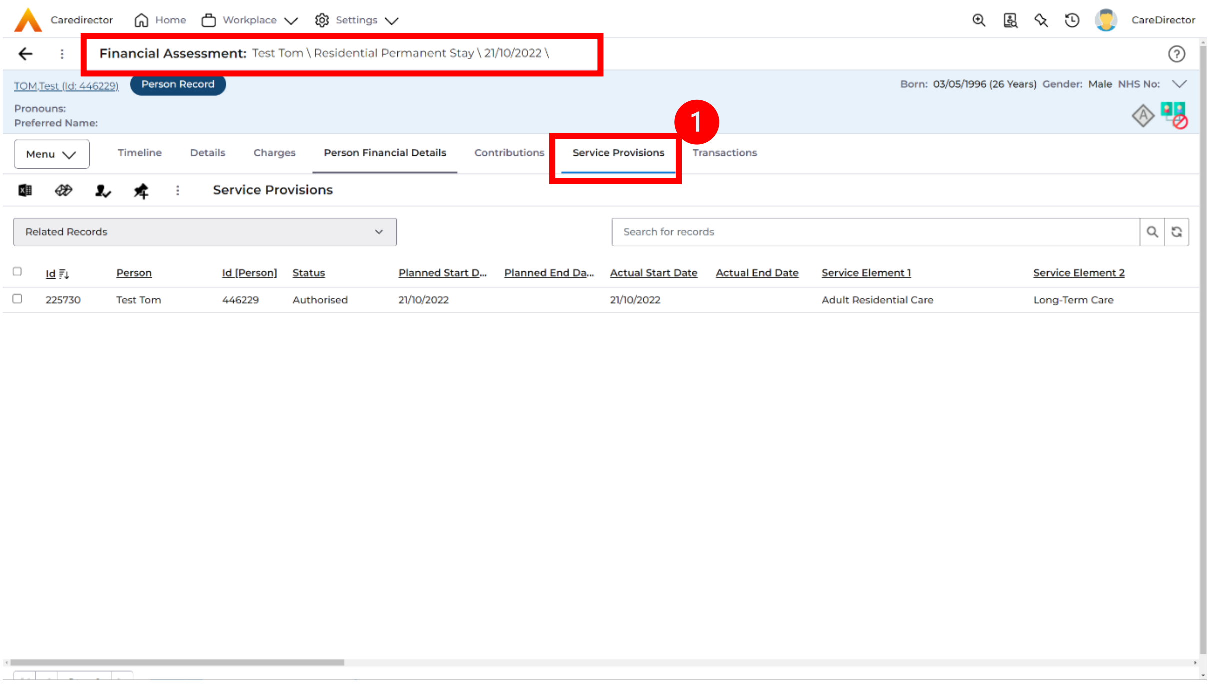
8. When finished, select **Save**. Fill out another **Person Financial Detail** if required.

9. They may be a requirement to ensure **Financial Detail** has **Occupational Pension (50% to Spouse) – Variable** is included as a **Benefit & Income** but be sure to check.



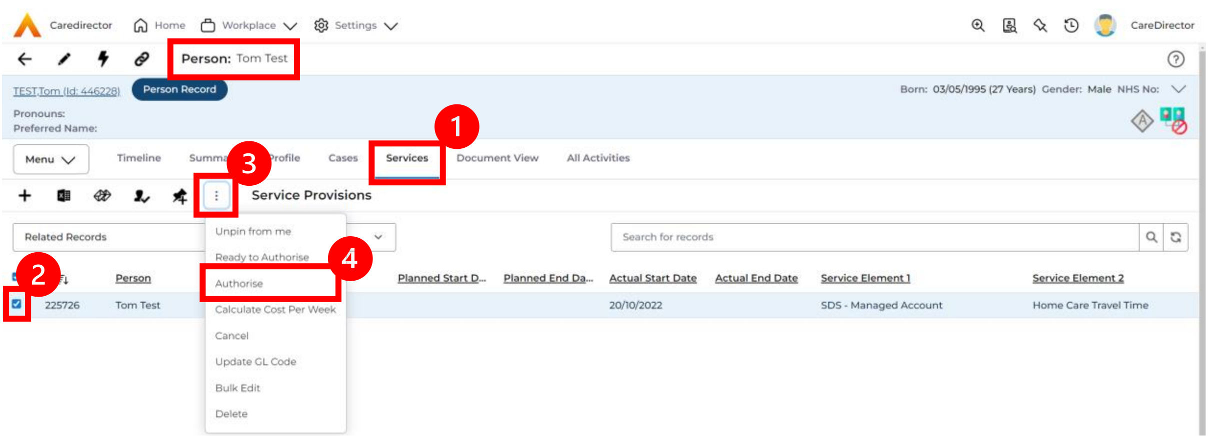
Ensure Service Provisions are linked (How to Authorise Service Provisions)

1. Ensure your **Service Provision** is linked by going to the **Service Provisions** tab on the **Financial Assessment.**



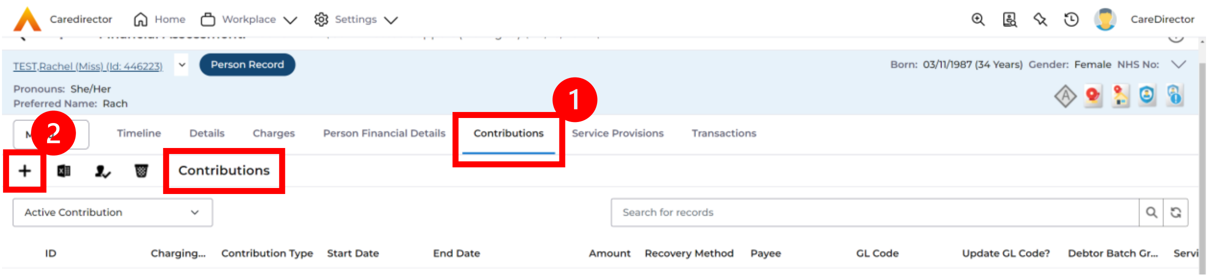
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised.** You will need to refresh your page if so.

3. **To Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

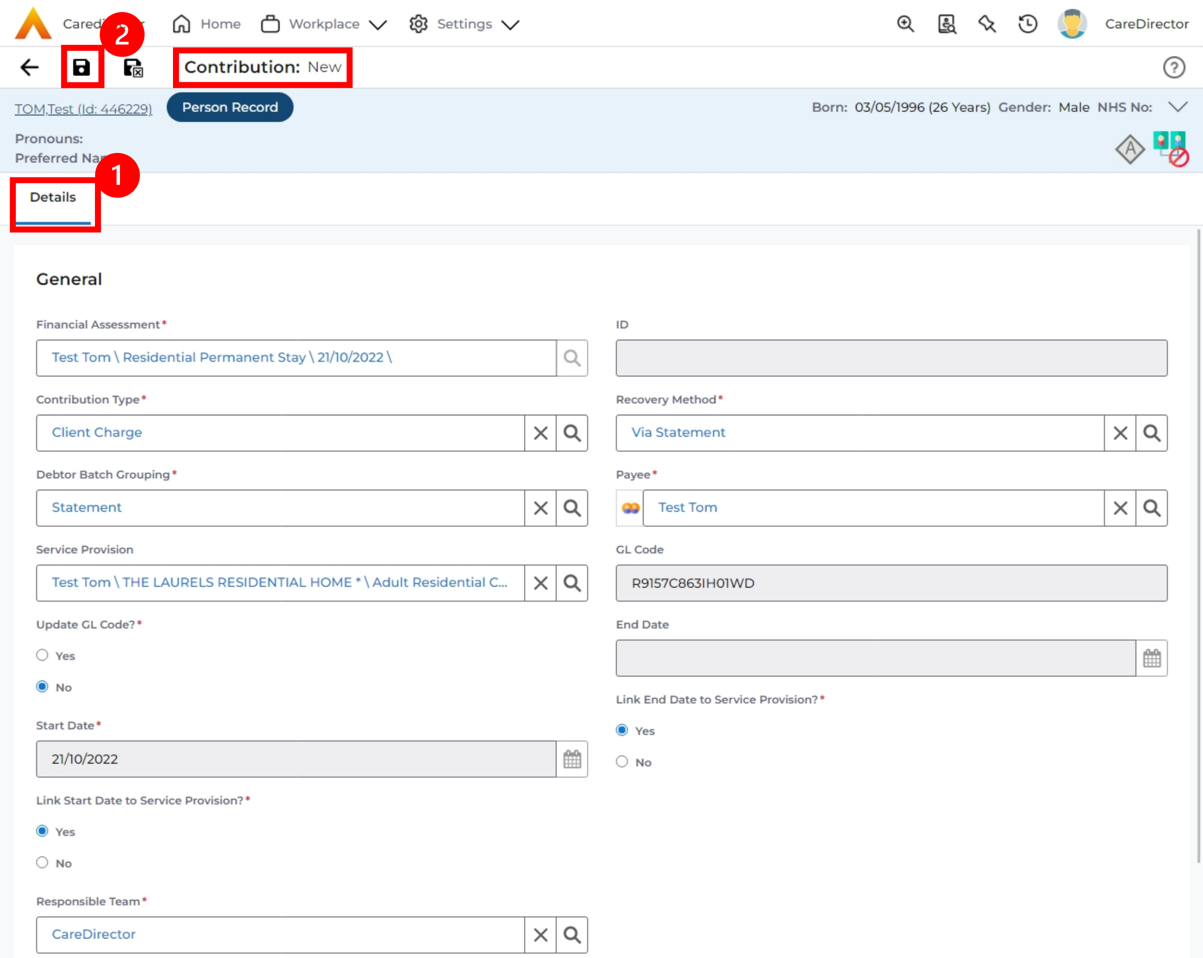


Contributions

1. When **Entering Personal Information** has been completed, we need to include **Contributions**. Locate the **Financial Assessment**, select the **Contributions** tab. Then select **Create New Record**.



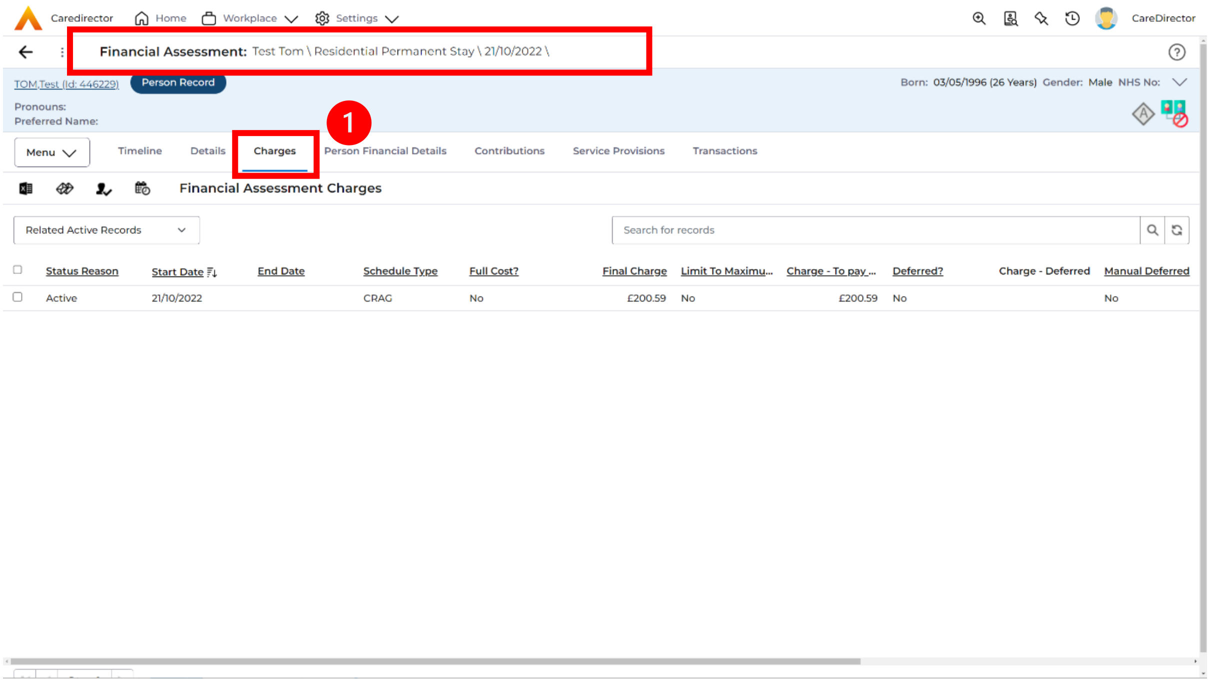
2. Fill in the relevant information. Ensure your **Service Provision** is **Authorised** as the **Service Provision** will not show. When finished, select **Save.**



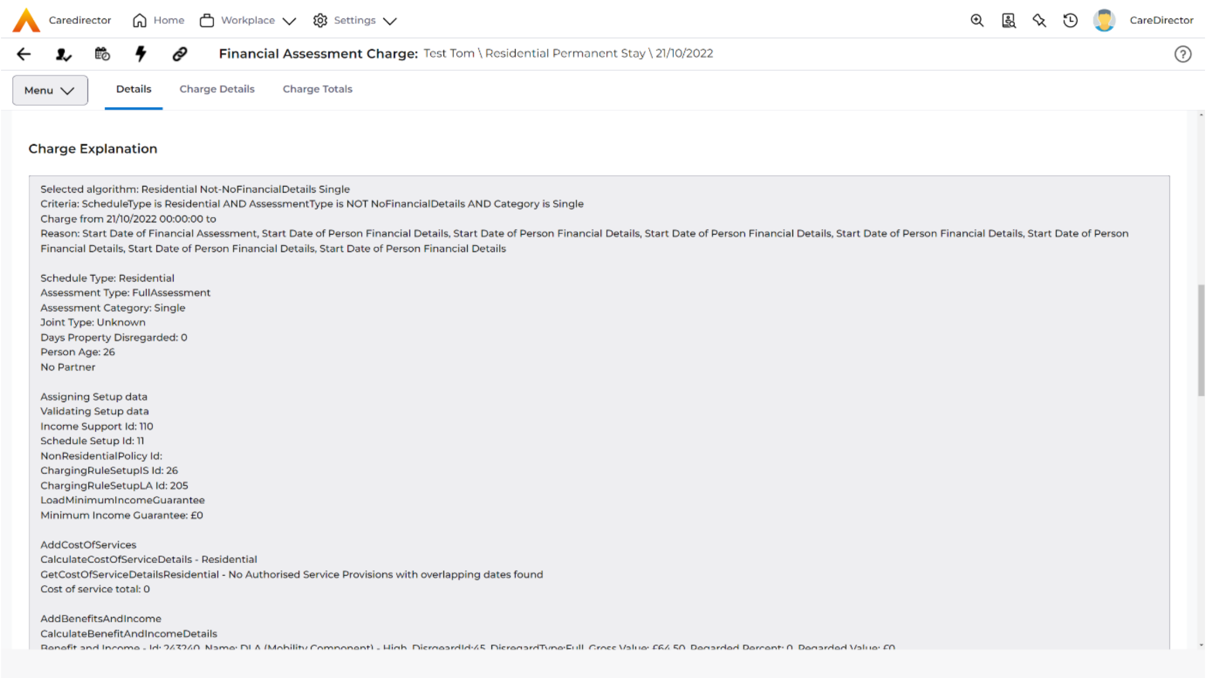
3. **Link Start/ End Date to Service Provision** if needed.

Calculate Charges

1. To check if the **Charges** are being calculated, select the **Charges** tab. This will show the **Final Charge**.



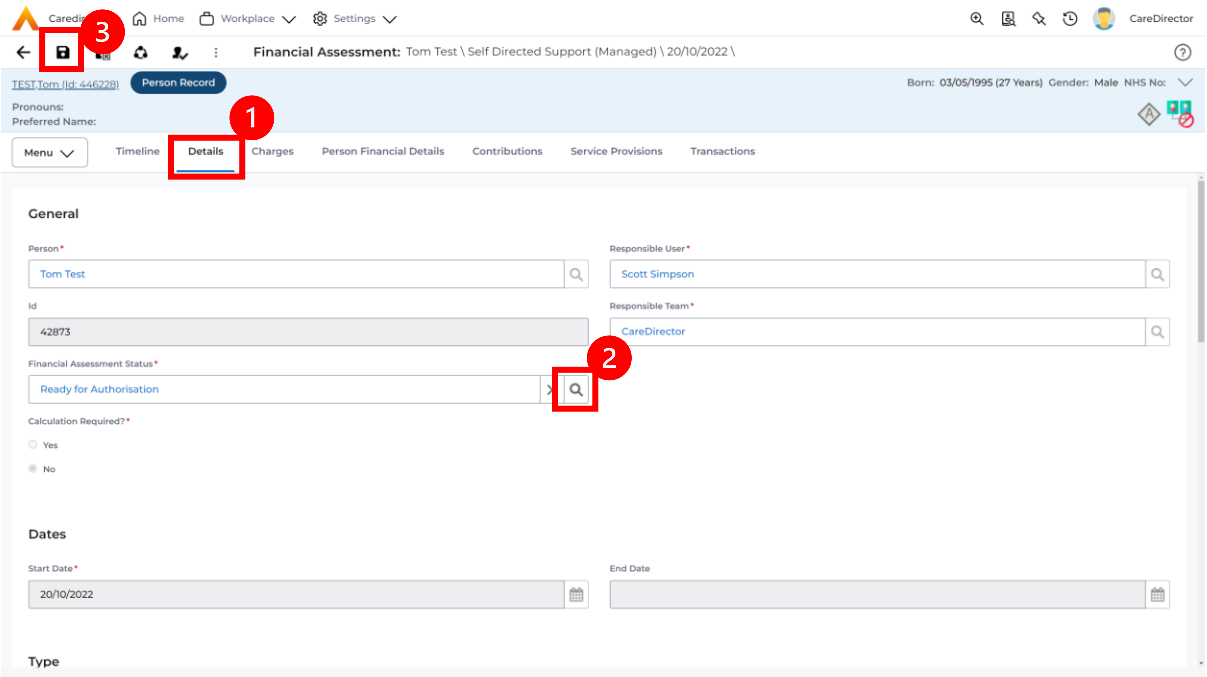
2. To check if it is calculating it correctly, select it and look through the **Charge Explanation.**



How to Change Financial Assessment Status

1. Once everything is inputted and you are happy with the **Charge**. The **Financial Assessment** is **Ready for Authorisation**.

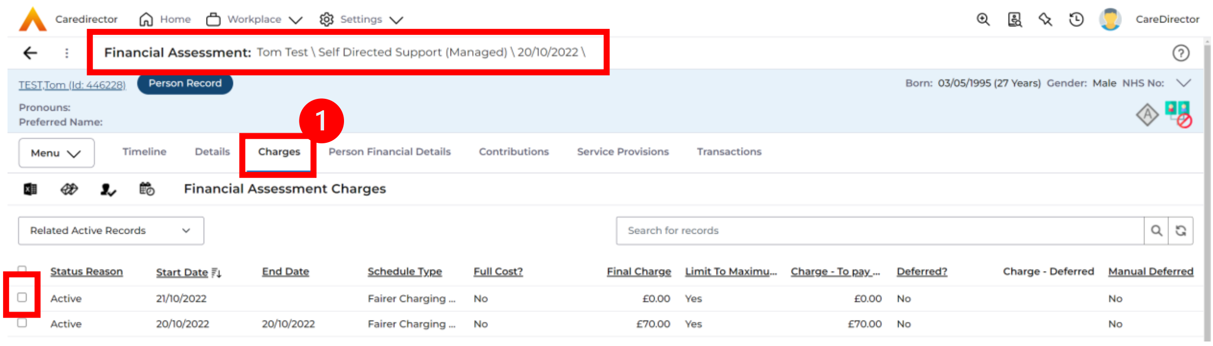
2. Select the **Details** tab and scroll down the **Financial Assessment Status** field. Then using the lookup function change it to **Ready for Authorisation**.



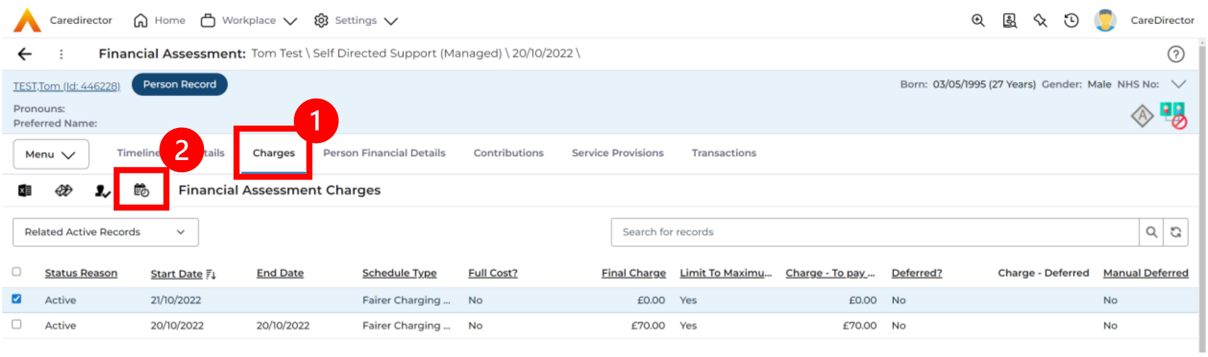
3. Then select **Save.** This will send an **Activity** through to the manager to **Authorise**.

How to view and print Charge Schedule

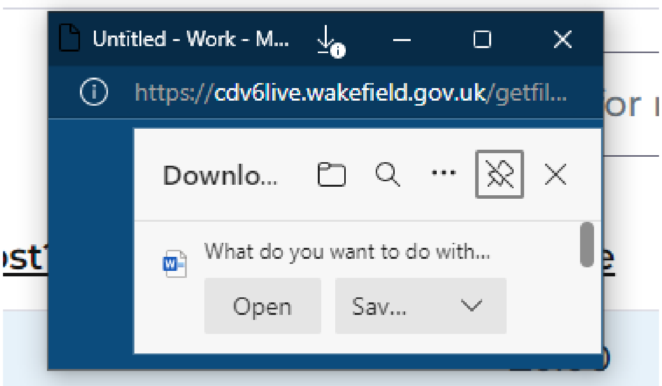
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.



2. Then select the **View Charge Schedule** on the toolbar next to **Financial Assessment Charges**.



3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.

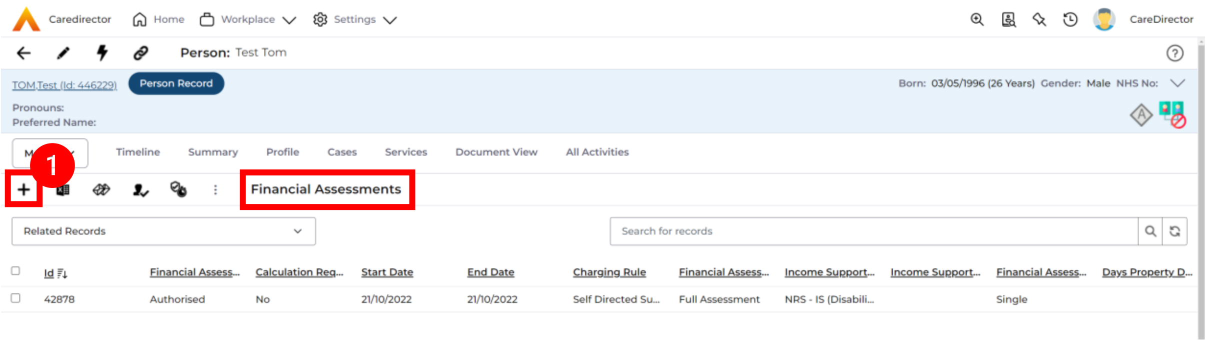


4. Once opened in **Microsoft Word** select **File, Print.**

How to input a Financial Assessment Respite

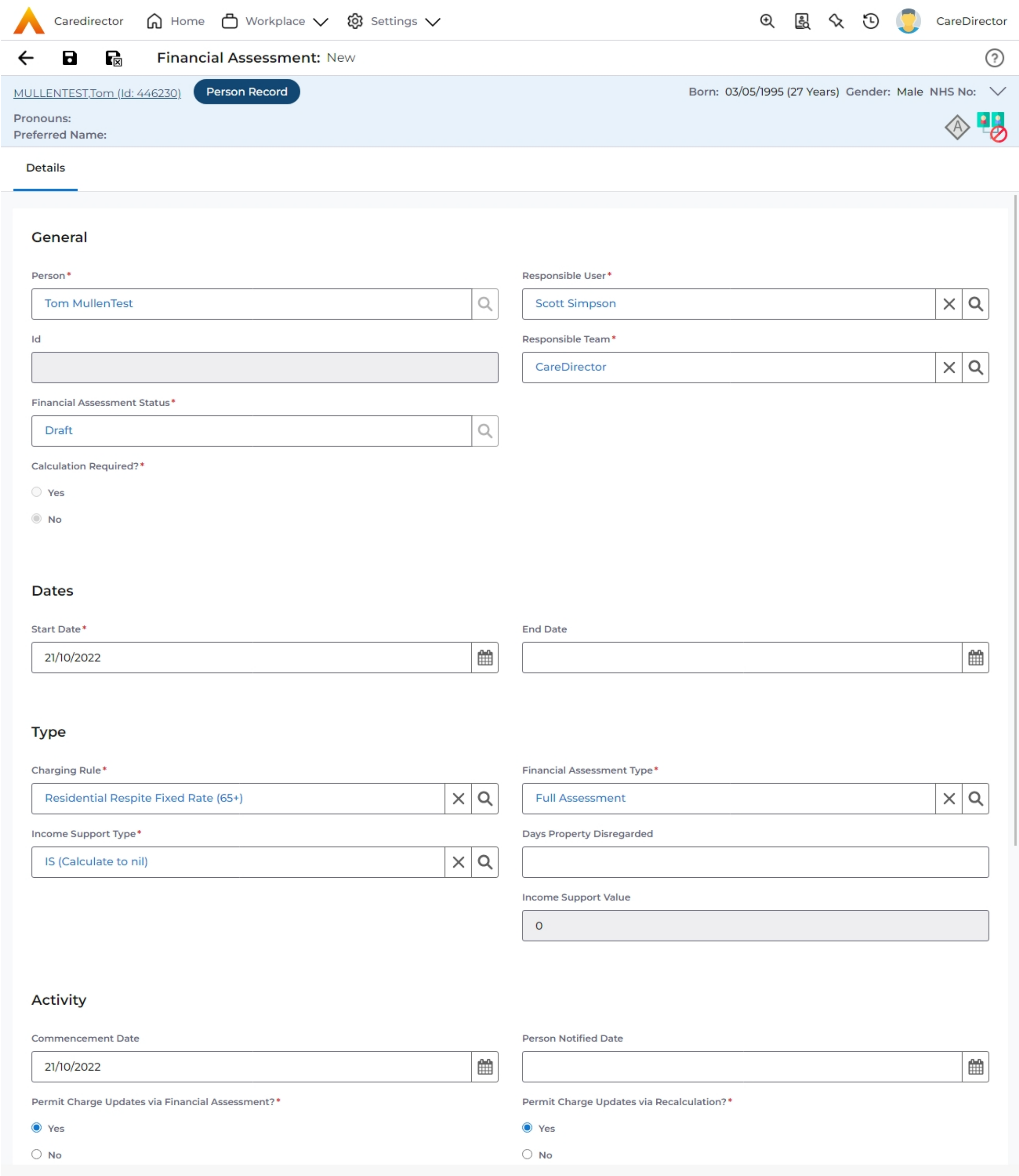
Creating the Financial Assessment (Respite)

1. Locate the **Financial Assessment** screen and **Create New Record.**



2. Next is the information that is required:
   a. **Responsible User/ Team** choose is responsible.
   b. **Start Date** as needed.
   c. **Charging Rule** select **Residential Permanent Stay.**
   d. **Financial Assessment Type** select appropriate option**.**
   e. Under **Income Support Type** select the relevant option.
   f. Select **Yes** or **No** to the **Permit Charge Updates via Financial Assessment** and **Recalculation.**

3. When finished, select **Save.**

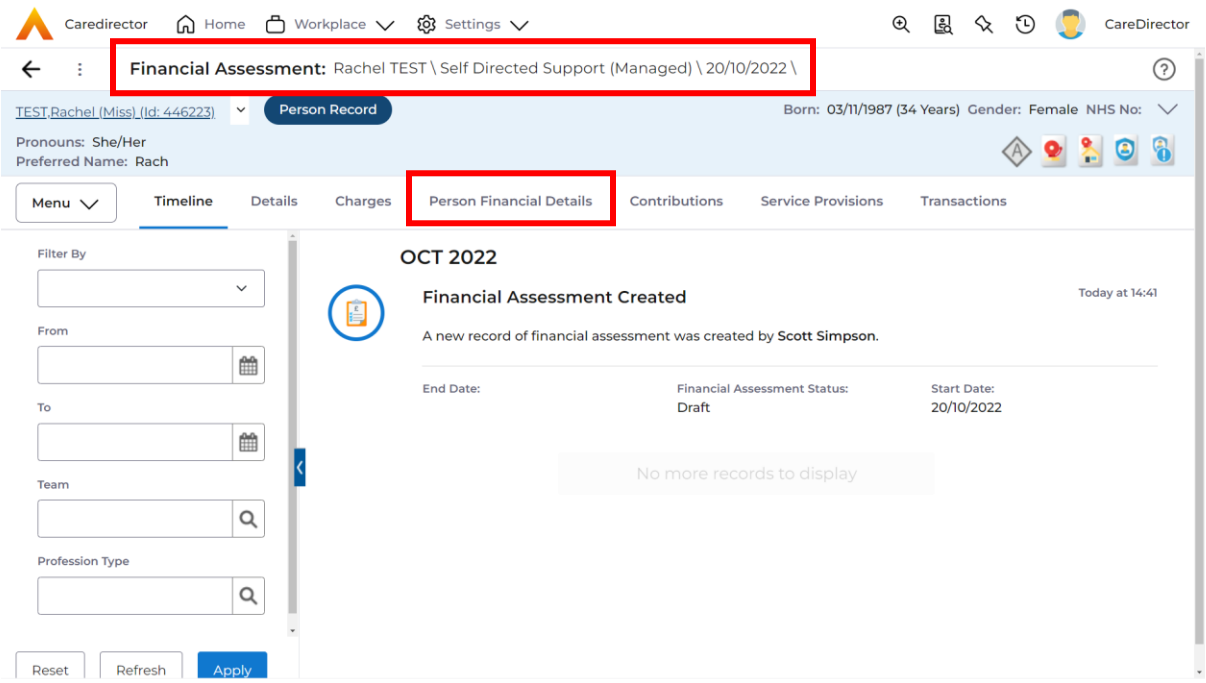


4. Now the **Financial Assessment** for **Residential Permanent Stay** requires more personal information.

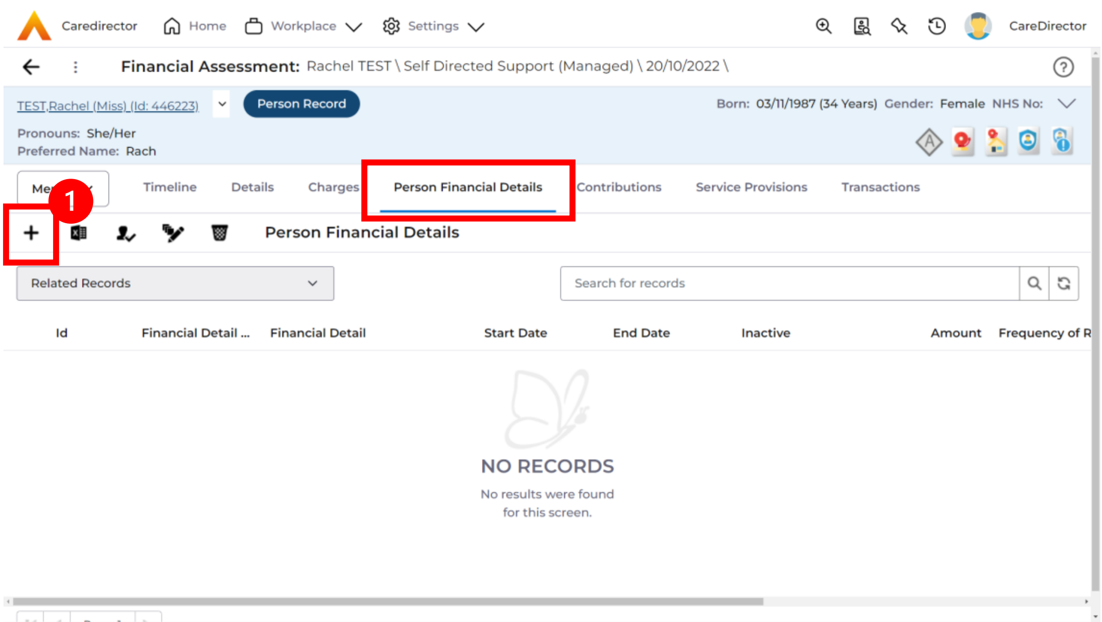
Entering Personal Information

1. This requires knowledge of **Benefits & Income**, **Assets**, **Allowable Expenses** of the **Service User**.

2. After you have **Saved** the **Financial Assessment** or relocated it. You should by default be on the **Timeline** and see **Person Financial Details** as a tab.



3. Select **Person Financial Details** and then **Create New Record**.



4. Requirements for this section are as followed:
    a. Leave **ID** blank (system will automatically fill this).
    b. Select the **Responsible Team**.
    c. Select the **Start Date.**
    d. **Person** will automatically be filled in.
    e. **Verification** is the proof that you have seen to provide this **Amount** and **Financial Detail Type.**

5. **Financial Detail Type** splits into 4:
    a. **Allowable Expense**
    b. **Asset**
    c. **Benefit & Income**
    d. **Property**

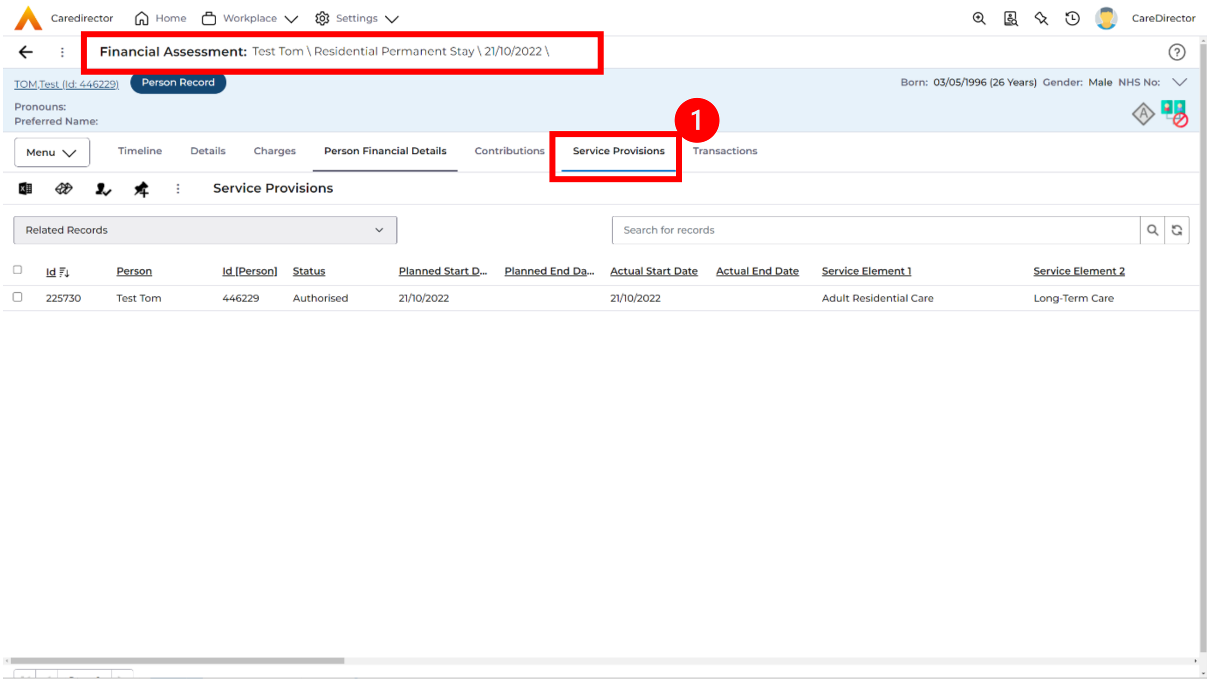
6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

7. **Amount** is how much that individual **Financial Detail Type** is.

8. When finished, select **Save**. Fill out another **Person Financial Detail** if required.

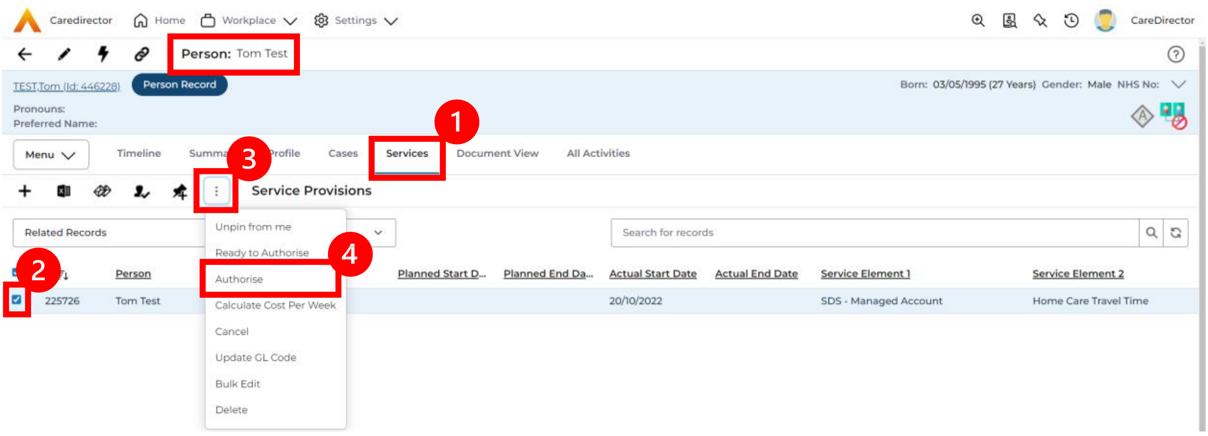
Ensure Service Provisions are linked (How to Authorise Service Provisions)

1. Ensure your **Service Provision** is linked by going to the **Service Provisions** tab on the **Financial Assessment.**



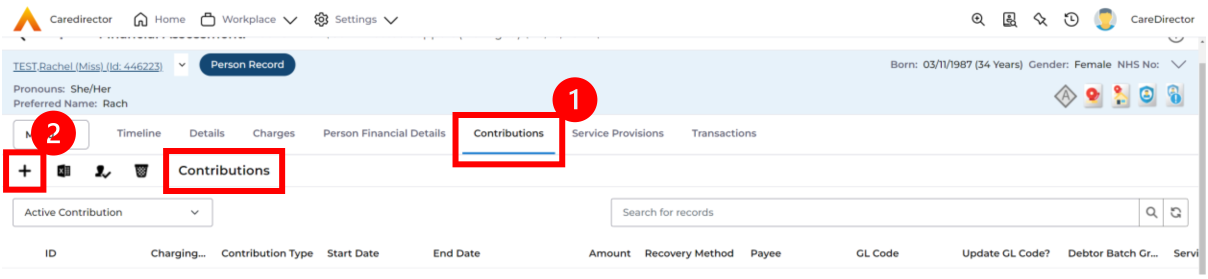
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised.** You will need to refresh your page if so.

3. **To Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

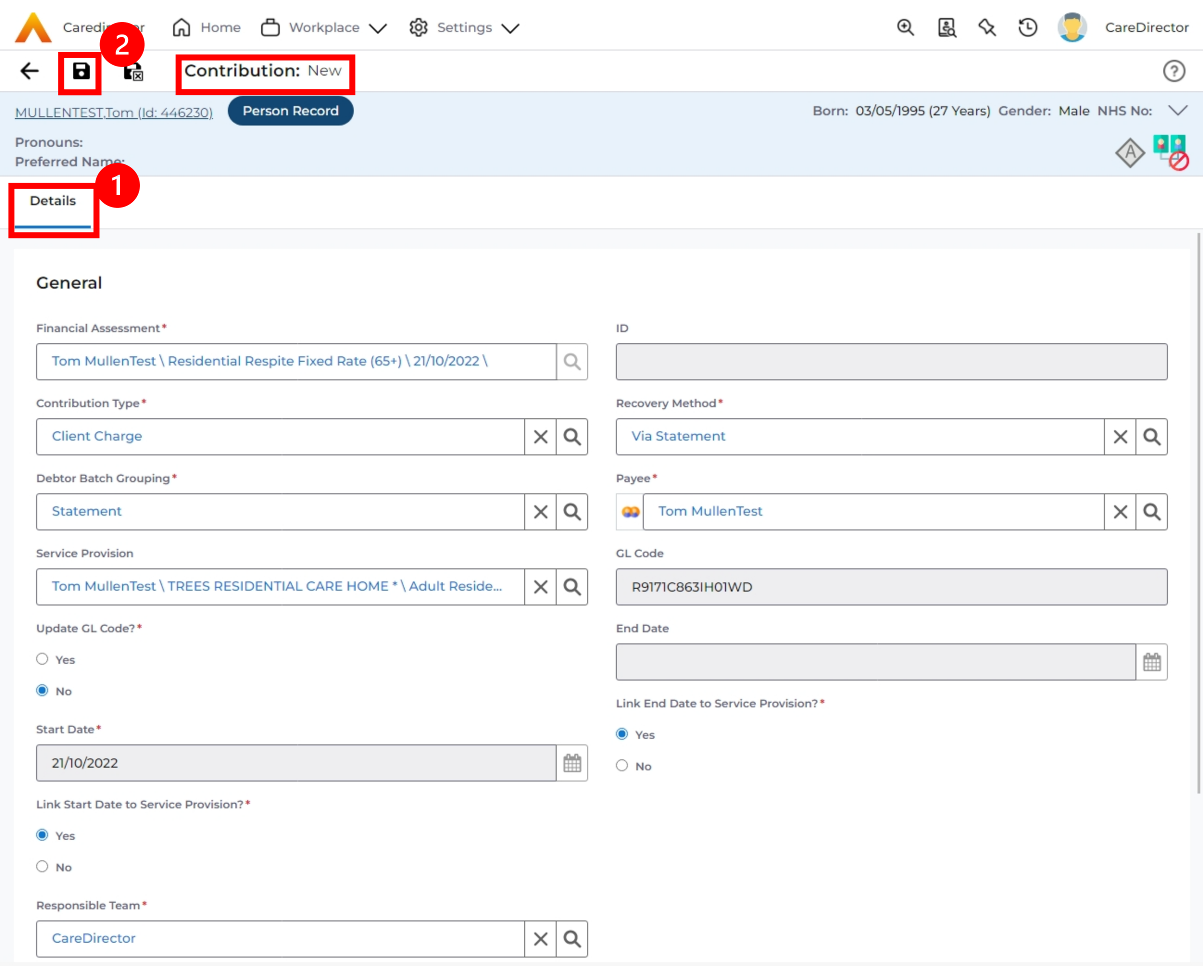


Contributions

1. When **Entering Personal Information** has been completed, we need to include **Contributions**. Locate the **Financial Assessment**, select the **Contributions** tab. Then select **Create New Record**.



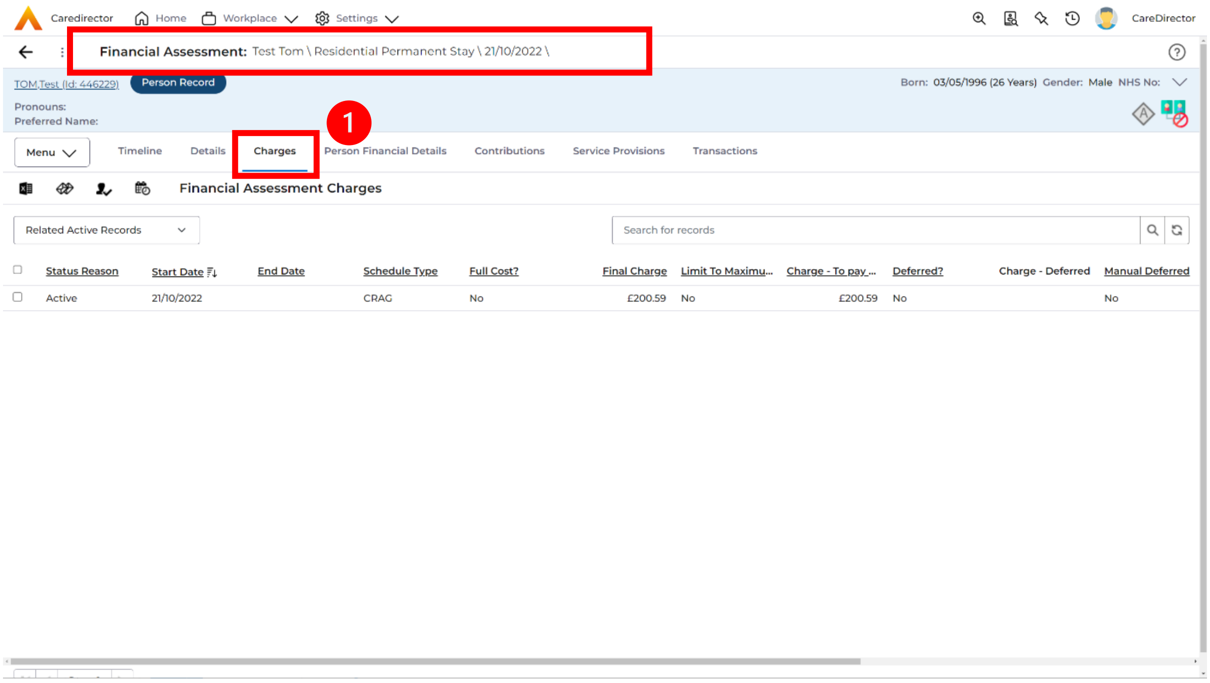
2. Fill in the relevant information. Ensure your **Service Provision** is **Authorised** as the **Service Provision** will not show. When finished, select **Save.**



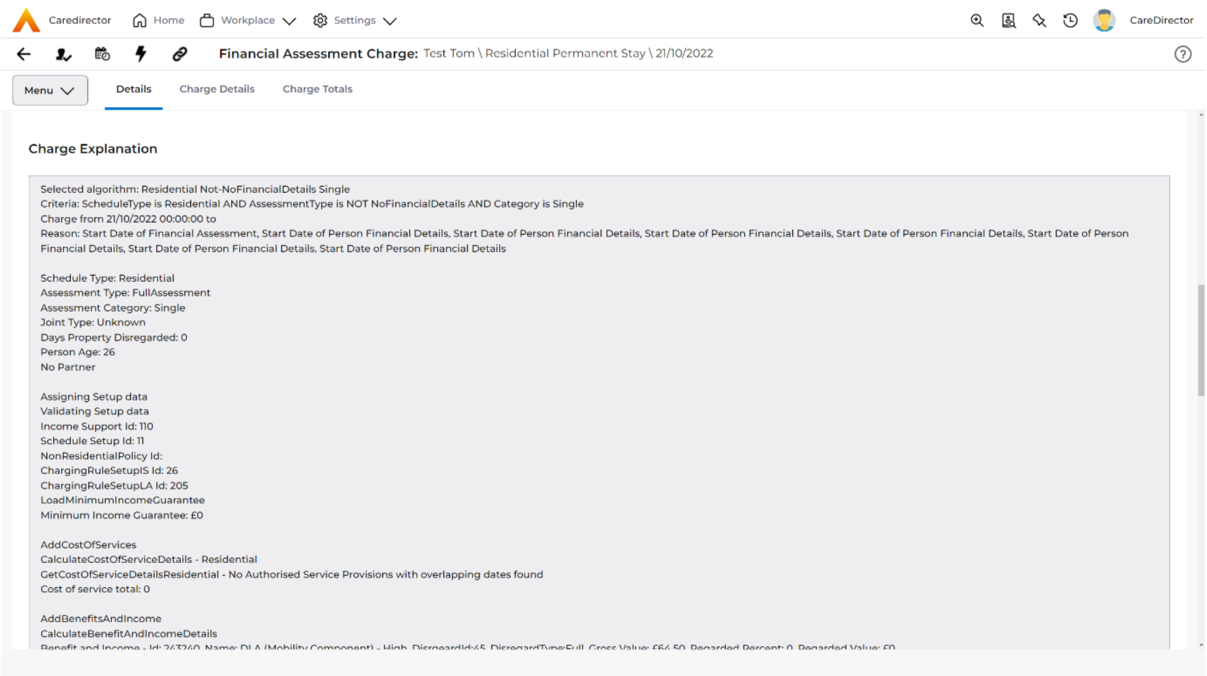
3. **Link Start/ End Date to Service Provision** if needed.

Calculate Charges

1. To check if the **Charges** are being calculated, select the **Charges** tab. This will show the **Final Charge**.



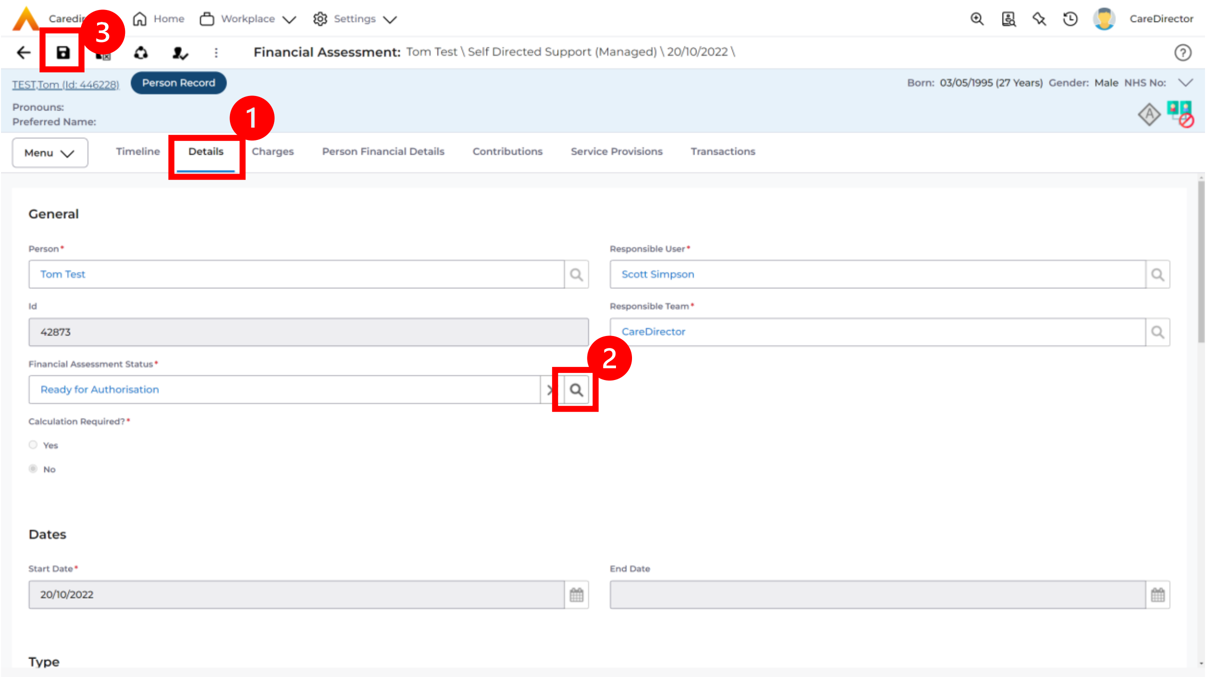
2. To check if it is calculating it correctly, select it and look through the **Charge Explanation.**



How to Change Financial Assessment Status

1. Once everything is inputted and you are happy with the **Charge**. The **Financial Assessment** is **Ready for Authorisation**.

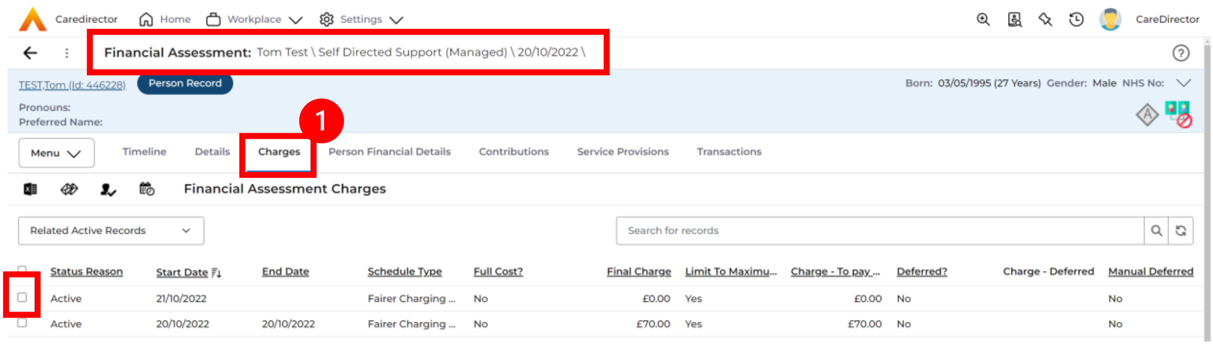
2. Select the **Details** tab and scroll down the **Financial Assessment Status** field. Then using the lookup function change it to **Ready for Authorisation**.



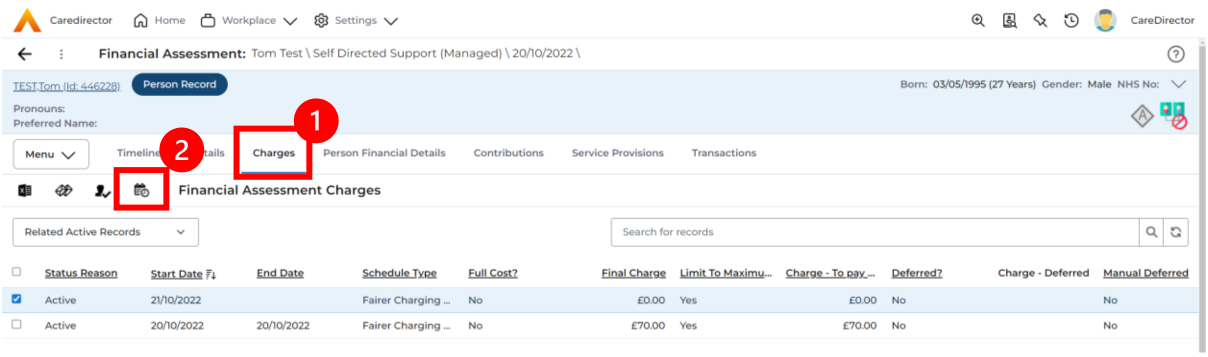
3. Then select **Save.** This will send an **Activity** through to the manager to **Authorise**.

How to view and print Charge Schedule

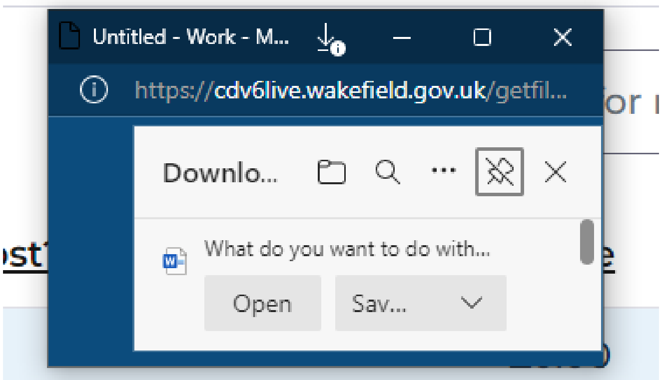
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.



2. Then select the **View Charge Schedule** on the toolbar next to **Financial Assessment Charges**.



3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.



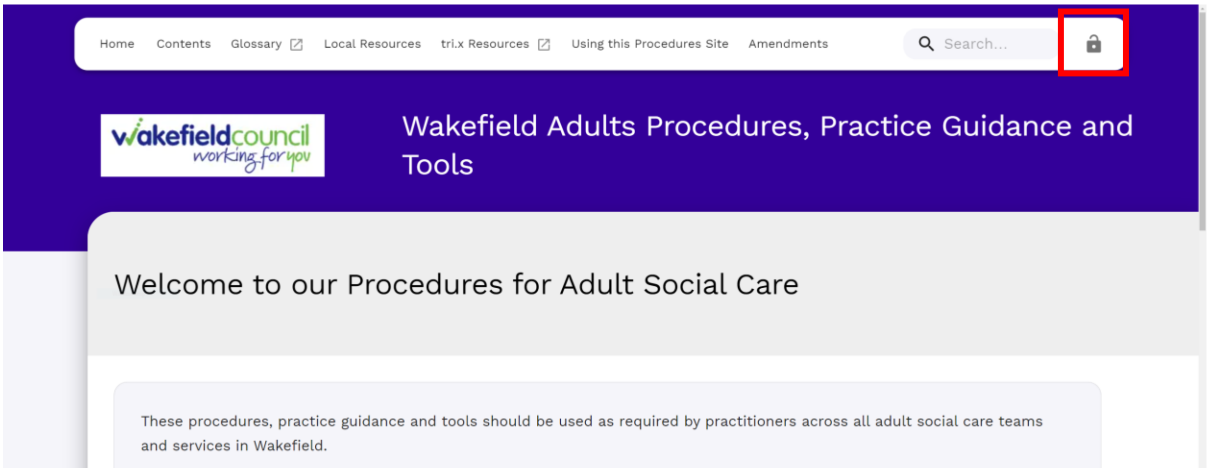
4. Once opened in **Microsoft Word** select **File, Print.**

Further CareDirector Guidance

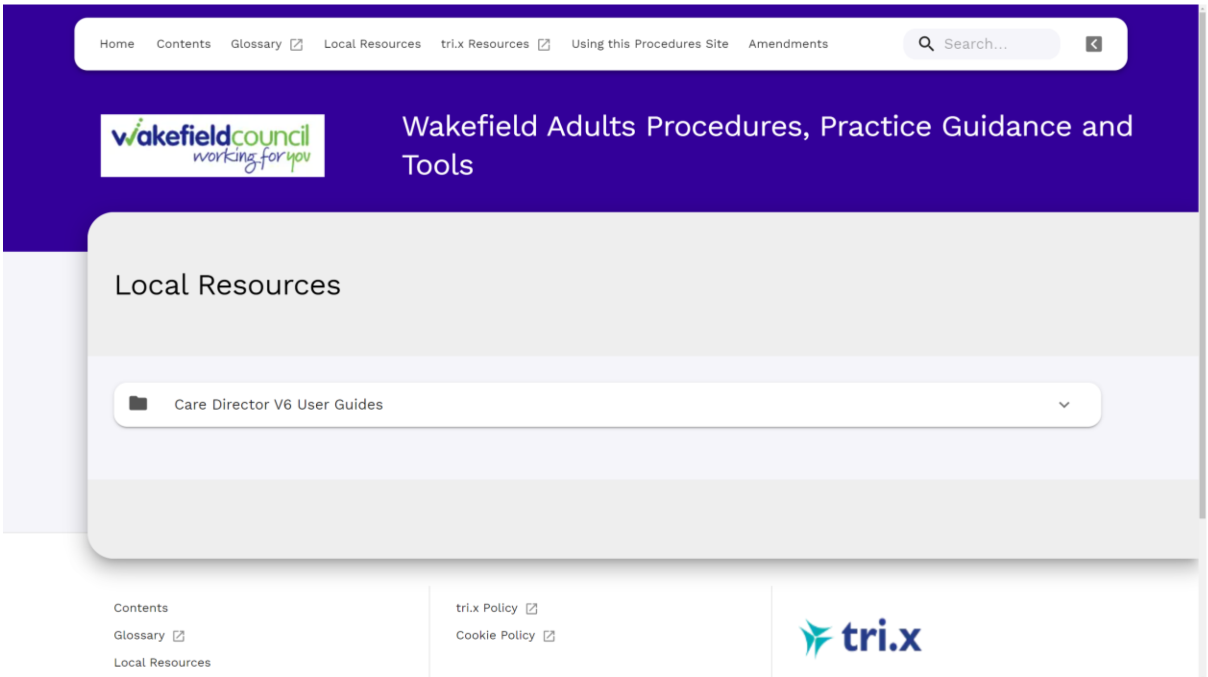
1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.

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	17/10/2022