



Personalisation & Assessment Team V1.0

Document CareDirector Personalisation & Assessment Team.
Purpose Personalisation & Assessment teams daily tasks on CareDirector.
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Owner ICT Business Transformation Team
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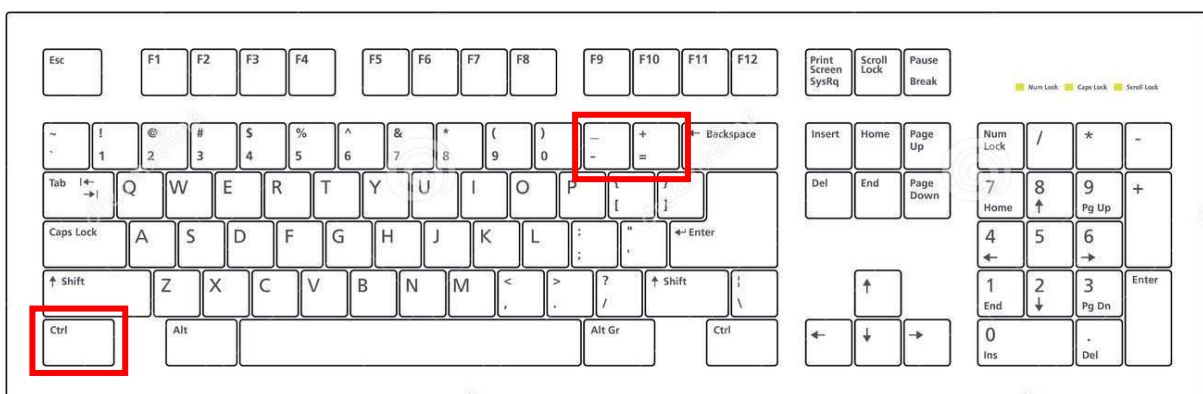
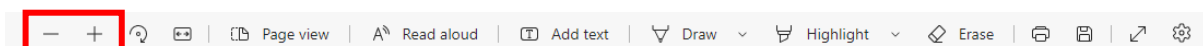
Guide Information

Before Live Access...

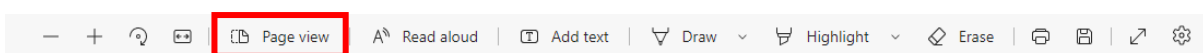
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

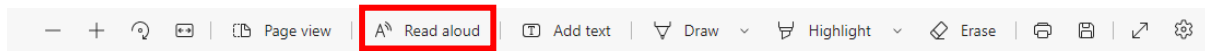
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold) and - (Press)** or **Ctrl (Hold) and + (Press)** on your keyboard.



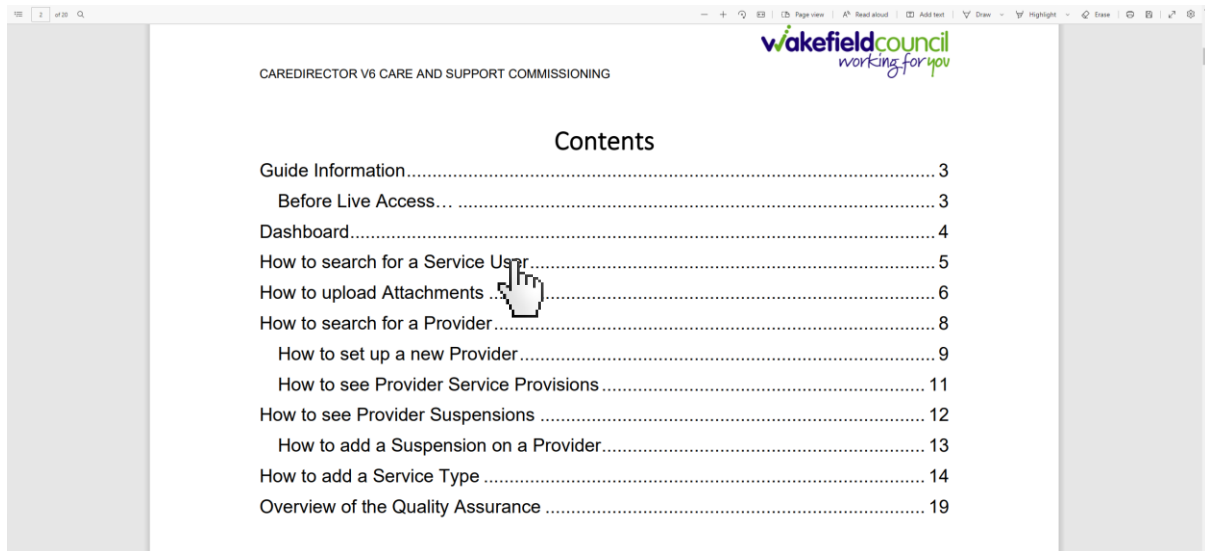
3. To put pages next to one another, select the **Page View** icon on the toolbar.



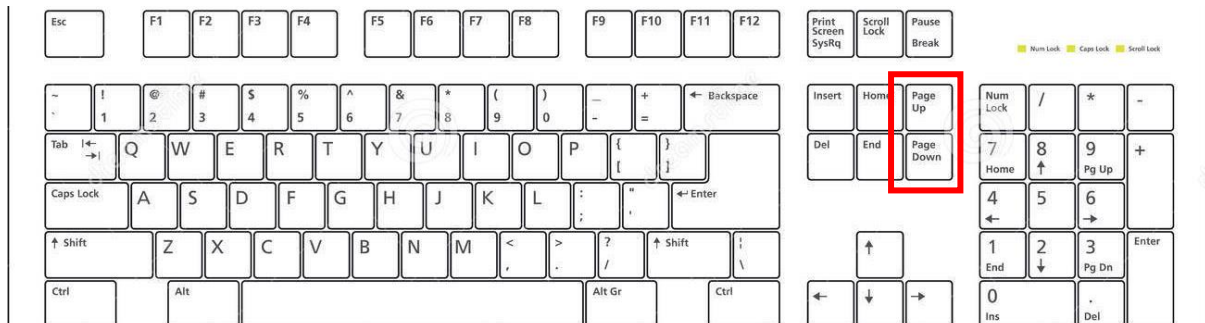
4. For auditory assistance, select **Read Aloud** from the toolbar.



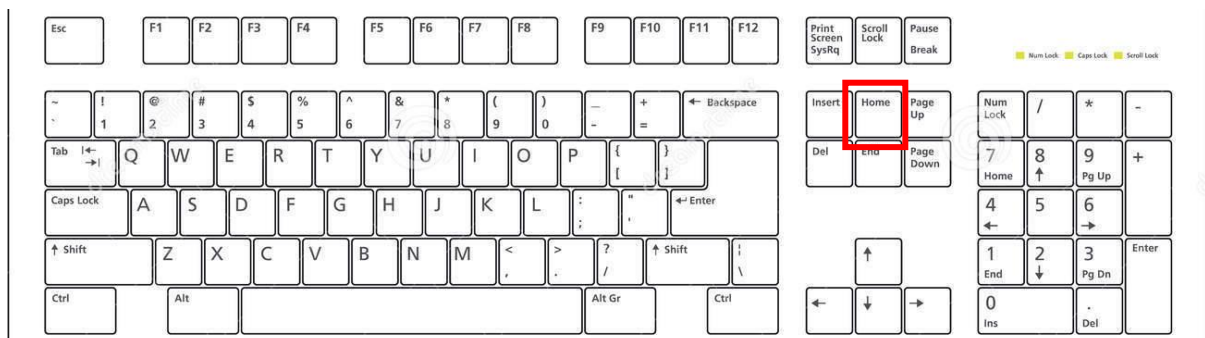
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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

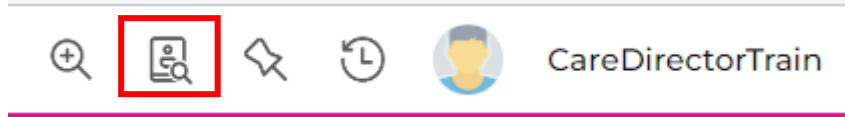


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



How to search for a Service User

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



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

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

Updating Person Details

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

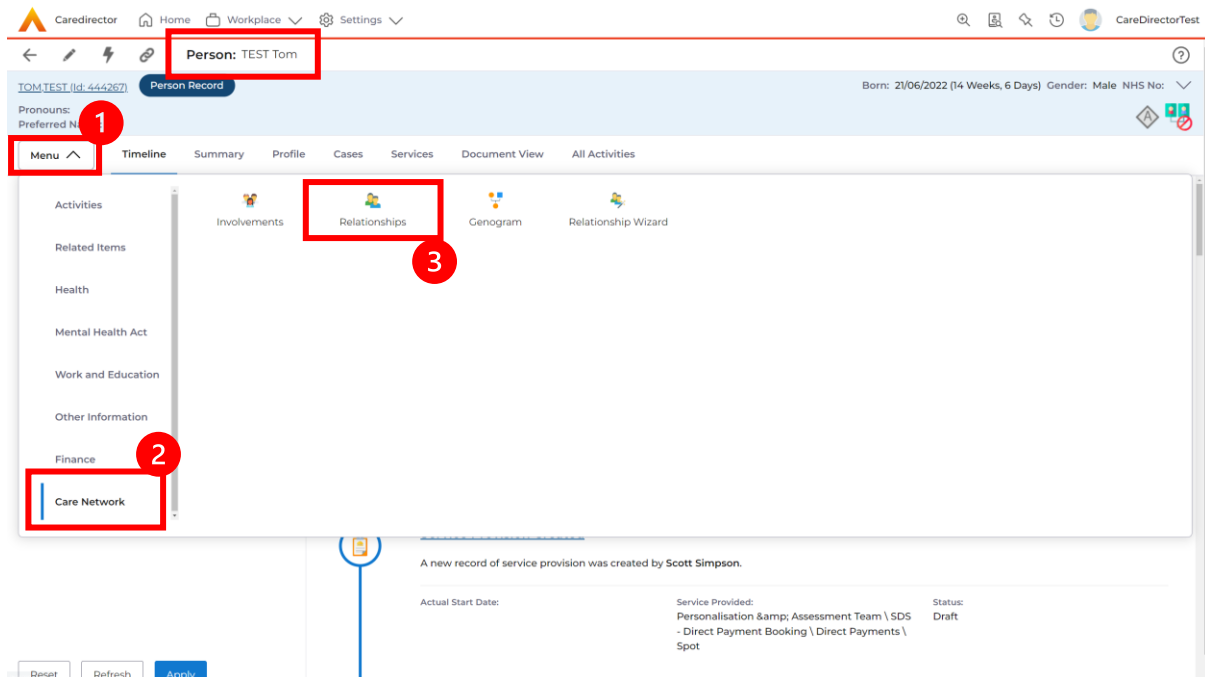
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for October 2022 and September 2022, including 'Form (Case)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

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

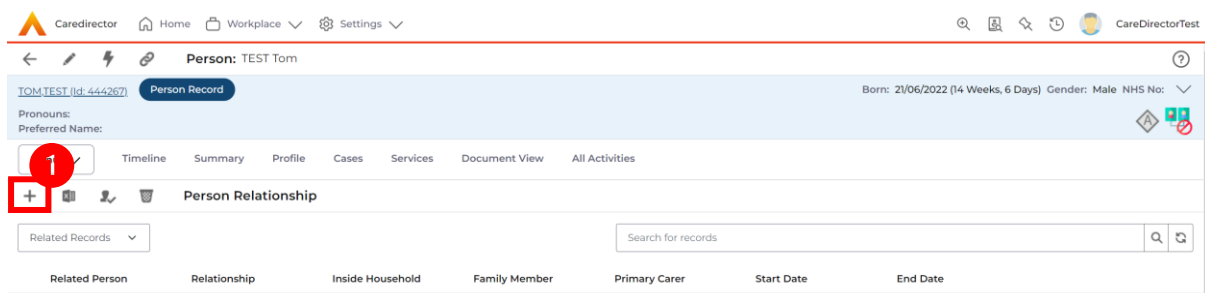
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no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

How to add relationships

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



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



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

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

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

Details

Relationship to Other Person

Primary Person*

is a*

To*

Reciprocal Relationship

Person

is a*

To

Relationship Details

Start Date*

Responsible Team*

End Date

Description

Nature of Relationship to Primary Person

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

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

How to search for a Case

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 '1' in a red circle. Below this, the 'Person Record' tab is active, and the 'Cases' sub-tab is highlighted with a red box. The main content area displays a timeline for 'OCT 2022' with two entries: 'Form (Case) Created' and 'Service Provision Created', both by Scott Simpson. The 'Form (Case) Created' entry includes details like 'Due Date', 'Form Type: AMHP Report Form', and 'Status: In Progress'. The 'Service Provision Created' entry includes details like 'Actual Start Date', 'Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot', and 'Status: Draft'.

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 '1' in a red circle. Below this, the 'Person Record' tab is active, and the 'Cases' sub-tab is highlighted with a red box. The main content area displays a table of related records. The table has columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', and 'Case Status'. The first two rows are highlighted with a red box and a '2' in a red circle. The first row is 'CareDirector Support' with 'Case Date/Time' 21/06/2022 07:00:00, 'Contact Reason' A - Adult Safeguarding, 'Case No' CAS-000001-0010, and 'Case Status' Assign To Team. The second row is 'AMHP Coordinator' with 'Case Date/Time' 20/09/2022 09:20:00, 'Contact Reason' A - AMHP Assessment, 'Case No' CAS-000001-0087, and 'Case Status' Assign To Team.

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

How to create a Case

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

The screenshot shows the CareDirector interface for a person record. The breadcrumb navigation shows 'Person: Tom MullenTest'. The 'Cases' tab is active. A table of related records is visible below.

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

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

The screenshot shows the 'Case: New' form in the CareDirector interface. The breadcrumb navigation shows 'Case: New'. The form is titled 'Details' and contains several input fields.

Contact Details

Case No * [Input field]

Person * [Tom MullenTest]

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

Initial Contact [Input field]

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

Contact Received By * [Scott Simpson]

Contact Reason * [A - Adult Safeguarding]

Presenting Priority [Input field]

Additional Information [Input field]

Referral Reason [Input field]

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 change the Case Status

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

The screenshot shows the 'Person Record' page for 'TOM.TEST (Id: 444267)'. The 'Details' tab is selected. Under 'Assignment Information', the 'Case Status' field is set to 'Assign To Team'. A red box with a '1' callout highlights the 'Details' tab, and another red box with a '2' callout highlights the magnifying glass icon next to the 'Case Status' field.

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

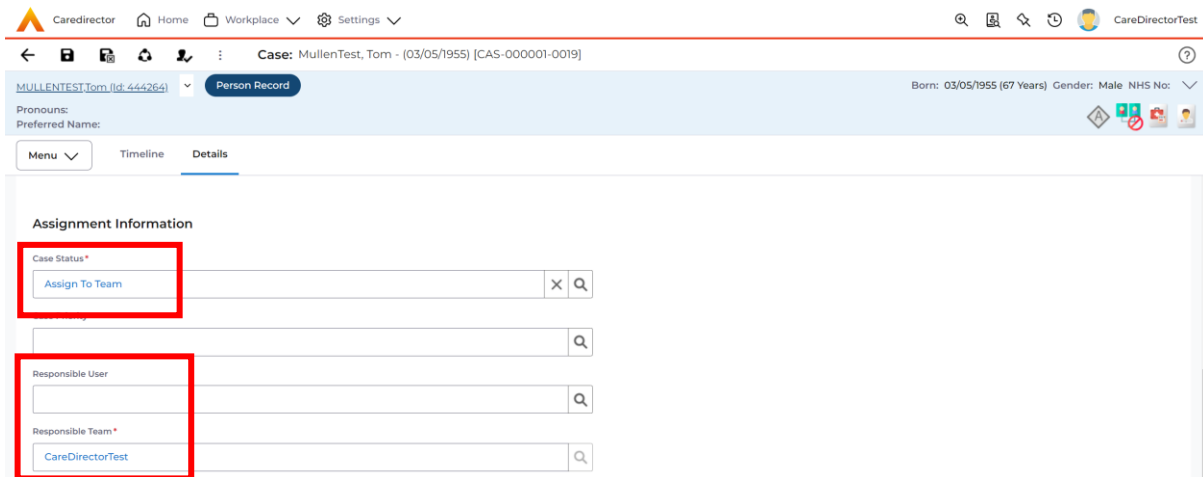
The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The 'Search' field contains 'Search for records'. A table lists the following options:

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

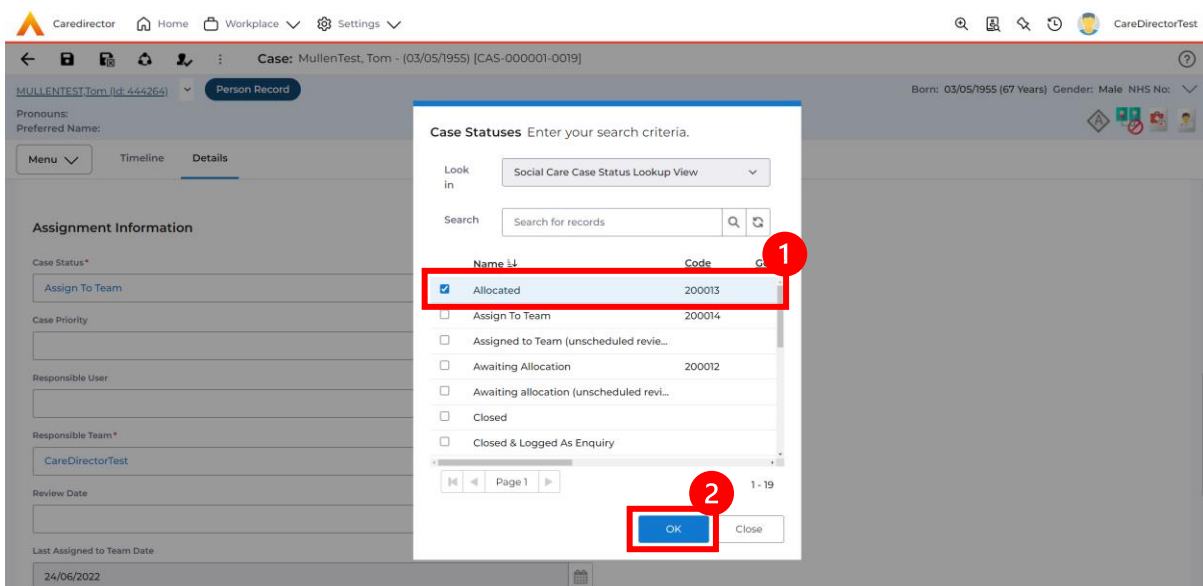
The first row, 'Allocated', is highlighted with a red box and a '1' callout. The 'OK' button at the bottom of the dialog is highlighted with a red box and a '2' callout.

How to Allocate a Case to a Worker

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



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



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

Responsible User*

🔍

The screenshot shows the CareDirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case details for 'MullenTest, Tom' are visible. The 'Assignment Information' section is active, showing 'Case Status' as 'Allocated' and 'Responsible User' as a dropdown menu. A 'System Users' dialog box is open, allowing the user to search for a responsible user. The dialog has a search bar (1), a list of users (2), and an 'OK' button (3). The background shows the 'Assignment Information' section with the 'Responsible User' field highlighted.

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

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

How to send a Case to another team

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

The screenshot shows the CareDirector interface for a case record. The 'Assignment Information' section contains the following fields:

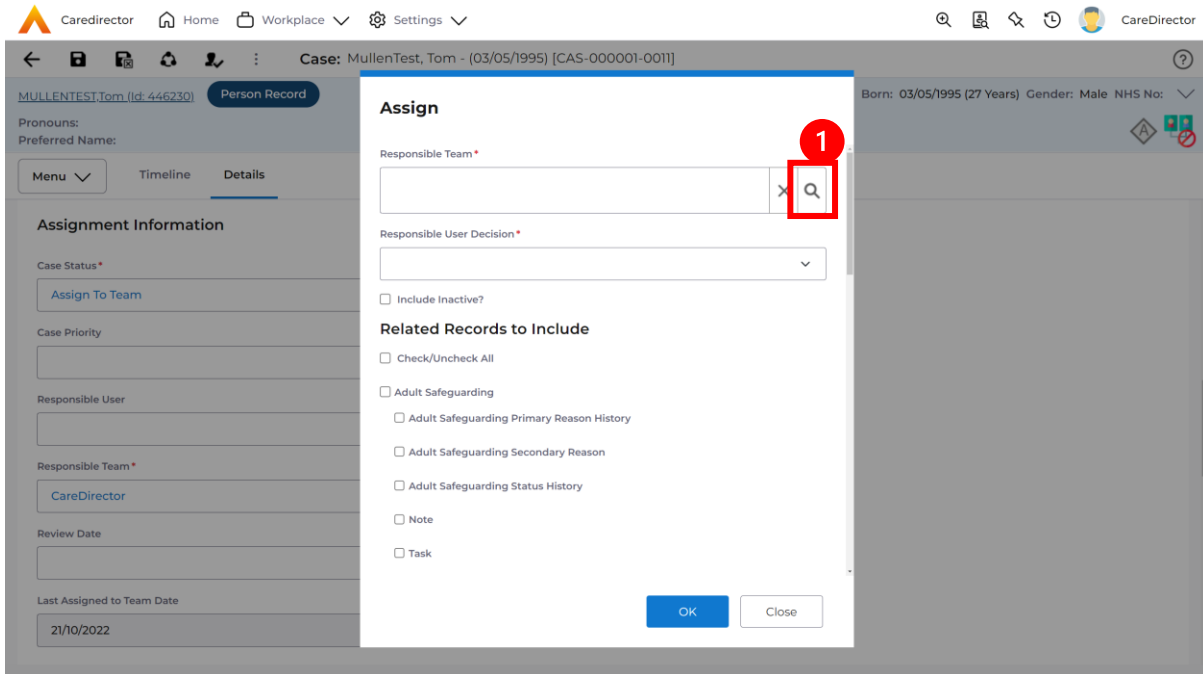
- Case Status ***: A dropdown menu currently showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: A text input field containing 'Scott Simpson'. A red box highlights this field with a '2' in a red circle.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.
- Review Date**: A date picker field.

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

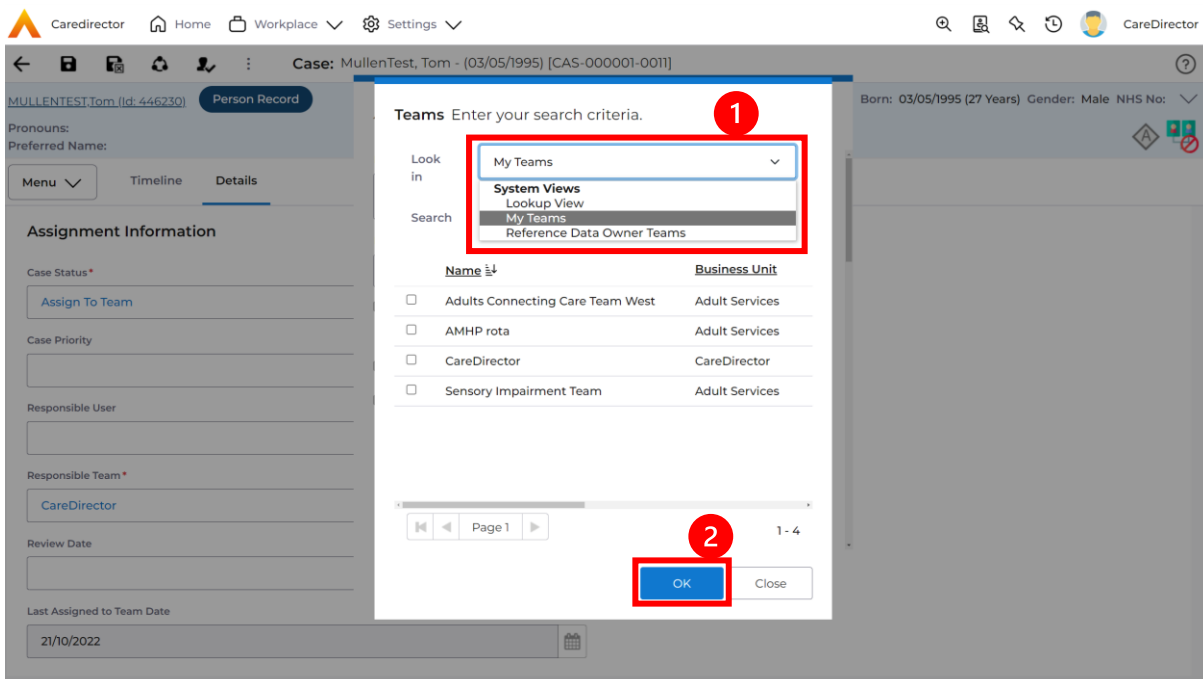
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- Case Status ***: A dropdown menu showing 'Assign To Team'. A red box highlights this field with a '1' in a red circle.
- Case Priority**: An empty text input field with a search icon.
- Responsible User**: An empty text input field with a search icon. A red box highlights this field with a '2' in a red circle.
- Responsible Team ***: A dropdown menu showing 'CareDirector'.

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



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



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

The screenshot shows the CareDirector interface for a case named 'MullenTest, Tom'. A modal window titled 'Assign' is open, allowing for team and user assignment. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown menu is highlighted with a red box and currently shows 'Do not change'. Below this, there are checkboxes for 'Include Inactive?' and 'Related Records to Include', with options for 'Check/Uncheck All', 'Adult Safeguarding', and various history types. The 'Responsible User' field in the background is also highlighted with a red box. The 'OK' button is visible at the bottom of the modal.

- 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.

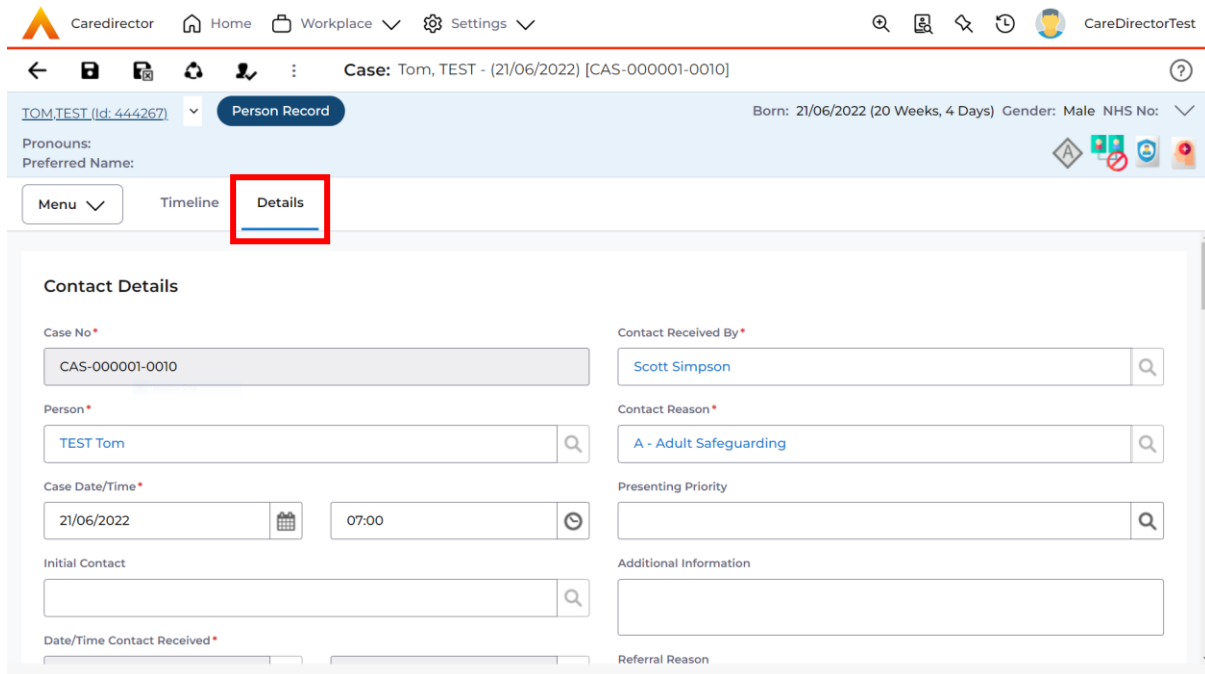
<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Community Occupatio...	31/08/2022	3
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	30
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	
<input type="checkbox"/>	Matt Davies	* Secondary Wor...		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	3

- 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**.

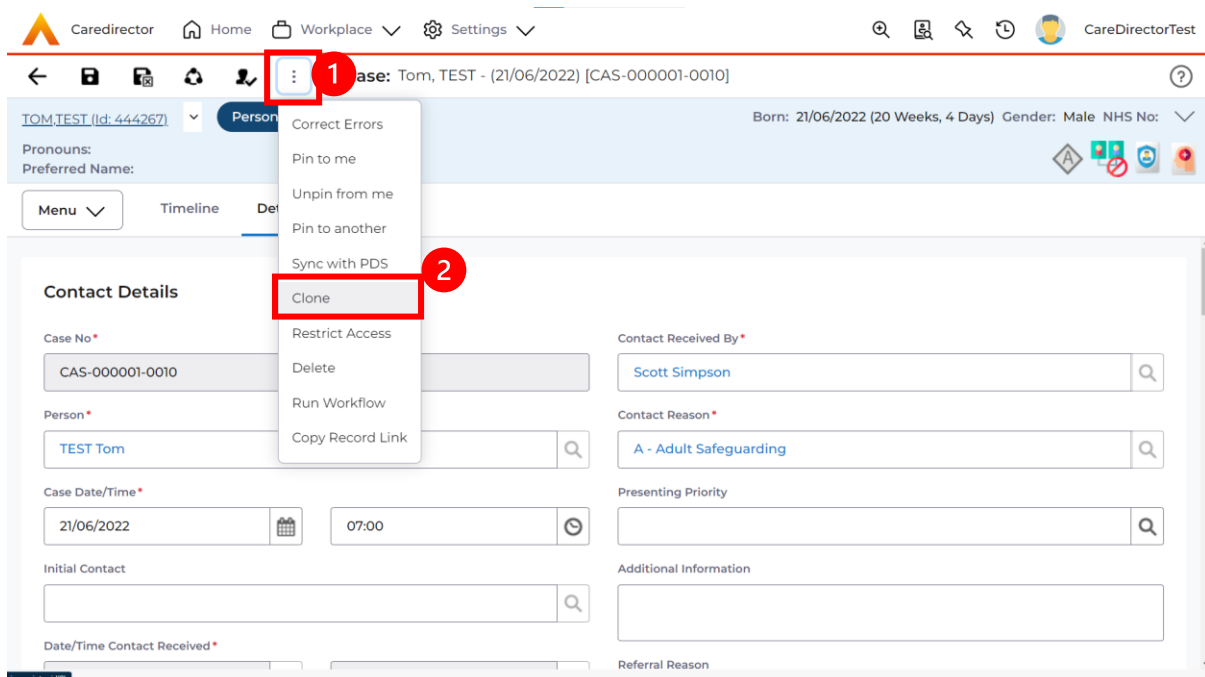
The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a red circle containing the number '1', and the 'Involvement Member' field is highlighted with a red box and a red circle containing the number '2'. The form includes fields for Case, Person, Involvement Member, Role, Start Date, Involvement Reason, Responsible Team, Involvement Priority, Involvement Status, End Date, Involvement End Reason, and Involvement Review Date. The 'Role' field currently displays '* Secondary Worker' and the 'Involvement Member' field displays 'Peter King'.

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**.



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

Clone Social Care Case

1

Start Date/Time for Cloned Cases *

12/11/2022

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

Page 1

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3

Clone Close

How to find Activities

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

My Active Tasks/Notes

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

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

Person: Test Tom

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

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

All Activities

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

Clear Filters | **Search**

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 record details include 'TOM,TEST (id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', and 'Gender: Male NHS No:'. A 'Menu' button is highlighted with a red box and a '1' in a red circle. The dropdown menu is open, showing 'Activities' highlighted with a red box and a '2' in a red circle. Other options in the menu include 'Timeline', 'Details', 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', 'Tasks', 'Related Items', and 'Other information'. Below the menu, there are input fields for 'Responsible User' and 'Responsible Team' (currently set to 'AMHP Coordinator').

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

The screenshot shows the CareDirector interface for a person record. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case name 'Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]' is displayed. The record details include 'TOM,TEST (id: 444276)', 'Person Record', 'Born: 24/07/1950 (72 Years)', and 'Gender: Male NHS No:'. A 'Menu' button is visible. Below it, a toolbar contains a '+' icon highlighted with a red box and a '1' in a red circle, along with other icons for record management. Below the toolbar, there's a 'Related Records' section with a search bar and a table of 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 application. The form is titled 'Case Note (For Case): New' and is for a person named 'TOM TEST (id: 444267)'. The form includes several fields: 'Case' (Tom, TEST - (21/06/2022) [CAS-000001-0087]), 'Reason', 'Priority', 'Date', 'Status' (Open), 'Responsible Team' (CareDirectorTest), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'. A red box highlights the 'Responsible User' field, and a red circle with the number '1' is next to it. Another red box highlights the 'Save' button in the top navigation bar, and a red circle with the number '2' is next to it.

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

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

1. Select the **Form** or **Activity** that requires to be **Completed**. This will send an **Activity** to your **Team Managers** dashboard for them to approve.
2. Under **Status** use the dropdown list to select **Completed**. After select **Save**.

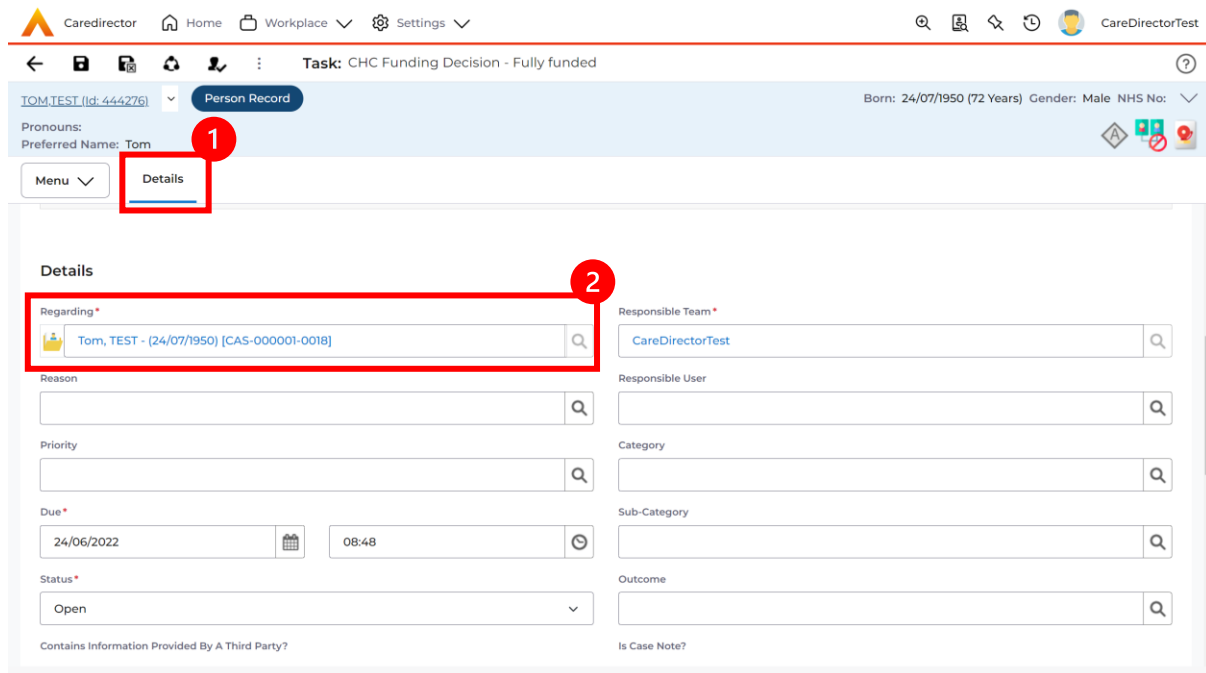
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955) [CAS-000001-000...'. The main content area shows a form for 'MULLENTTEST, Tom (Id: 444264)'. The form has several fields: 'Case' (MullenTest, Tom - (03/05/1955) [CAS-000001-0002]), 'Responsible Team' (CareDirectorTest), 'Form Type' (Adult - Change to Service Request), 'Responsible User' (Scott Simpson), 'Due Date' (23/06/2022), and 'Review Date'. A red box highlights the 'Status' dropdown menu, which is open and shows the following options: Complete, Not Started, In Progress, Closed, Cancelled, and Approved. The 'Complete' option is highlighted. A red circle with the number '1' is next to the 'Form Type' field.

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

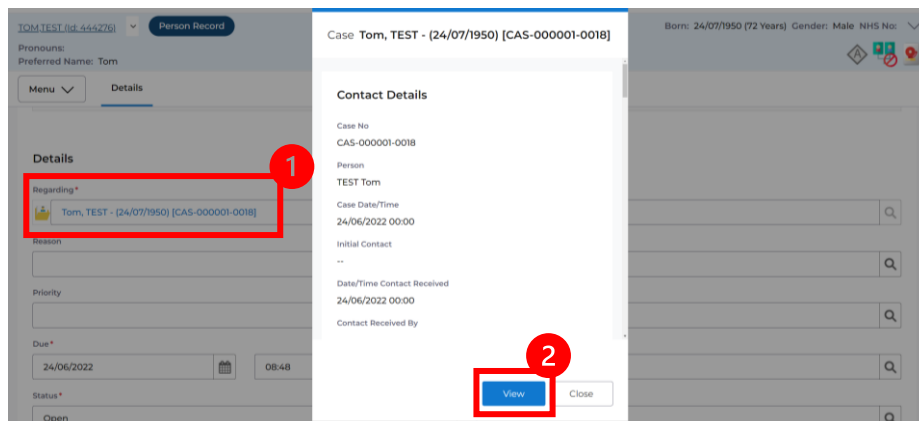
The screenshot shows the CareDirector interface. At the top, there are navigation icons and the user's name 'CareDirectorTest'. Below that, there's a breadcrumb trail: 'Task: Test Task for Case'. The main content area shows a form for 'MULLENTTEST, Tom (Id: 444264)'. The form has several fields: 'Subject'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

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

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



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test**. It is linked to a **Person Record**.
4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record**) and go into the record by selecting **View**.



How to Allocate a new Activity to another team

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

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

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

The screenshot shows the 'Task: New' form with a 'Teams' lookup modal open. The modal has three red callouts: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The modal title is 'Teams Enter your search criteria.' and it contains a search bar, a list of teams, and a table of results.

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

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

The screenshot shows the CareDirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' for 'MULLENTEST, Tom - (03/05/1995) [CAS-000001-001]'. The 'Details' section contains the following fields:

- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001] (with an 'X' icon highlighted by a red box and '2')
- Responsible Team***: Sensory Impairment Team (with an 'X' icon)
- Responsible User**: Scott Simpson (with an 'X' icon highlighted by a red box and '1')
- Reason**: (empty)
- Priority**: (empty)
- Due***: (empty)
- Status***: Open
- Category**: (empty)
- Sub-Category**: (empty)
- Outcome**: (empty)

At the bottom, there are two radio button options:

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

How to Allocate an existing Activity to another team

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

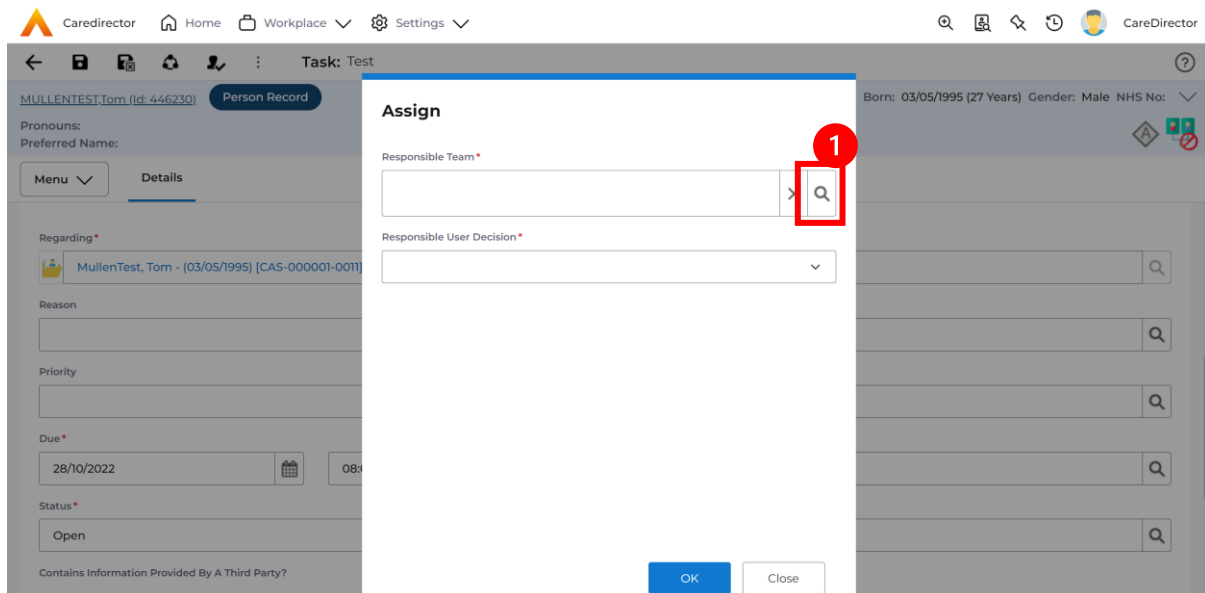
The screenshot shows the CareDirector interface for a task record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The record details include:

- Person Record: MULLENTEST, Tom (Id: 446230)
- Born: 03/05/1995 (27 Years) Gender: Male NHS No: [redacted]
- Details section:
 - Regarding*: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
 - Responsible Team*: Sensory Impairment Team
 - Responsible User: Scott Simpson (highlighted with a red box and a '1' in a red circle)
 - Reason: [empty]
 - Priority: [empty]
 - Due*: 28/10/2022, 08:00
 - Status*: Open
 - Category: [empty]
 - Sub-Category: [empty]
 - Outcome: [empty]

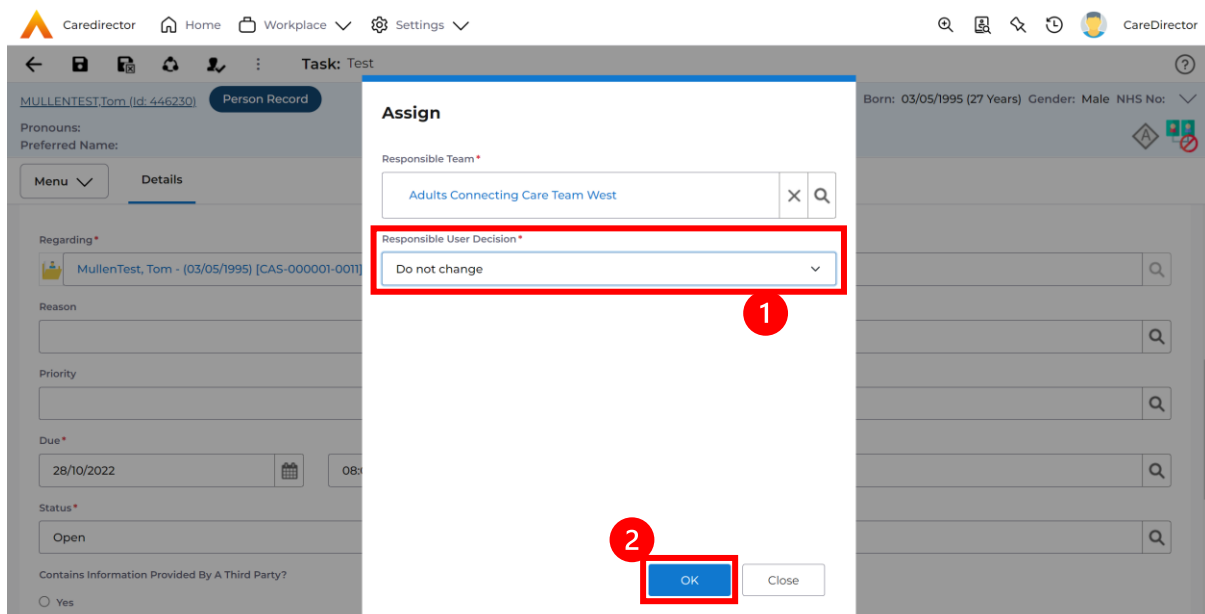
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same CareDirector interface as above, but with the 'Assign' icon in the toolbar highlighted with a red box and a '1' in a red circle. The task details remain the same, but the 'Responsible User' field is now empty, indicating the record has been assigned to a team.

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



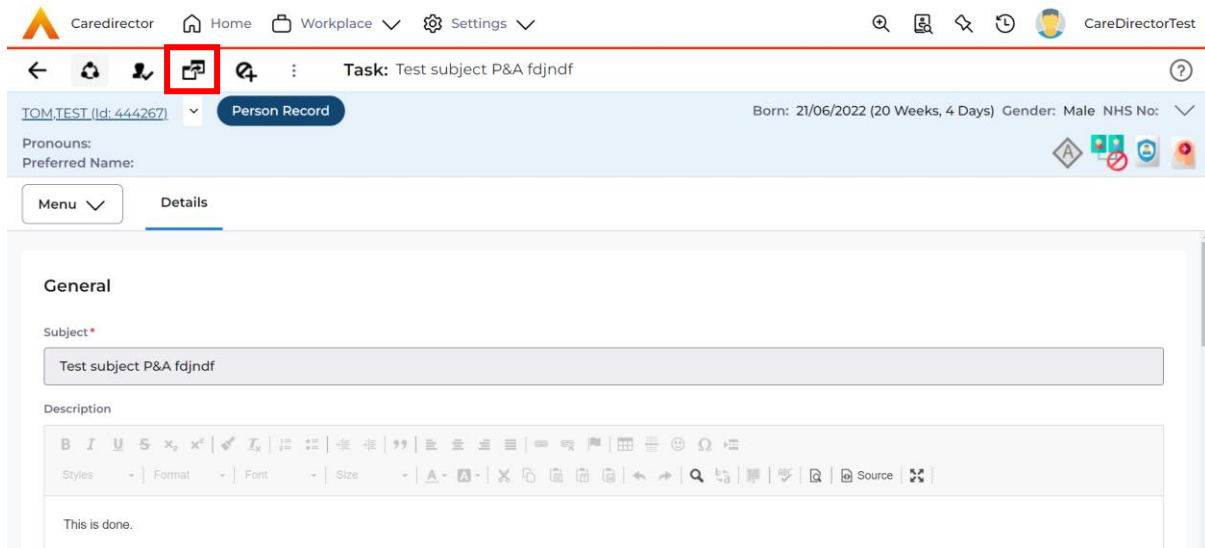
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



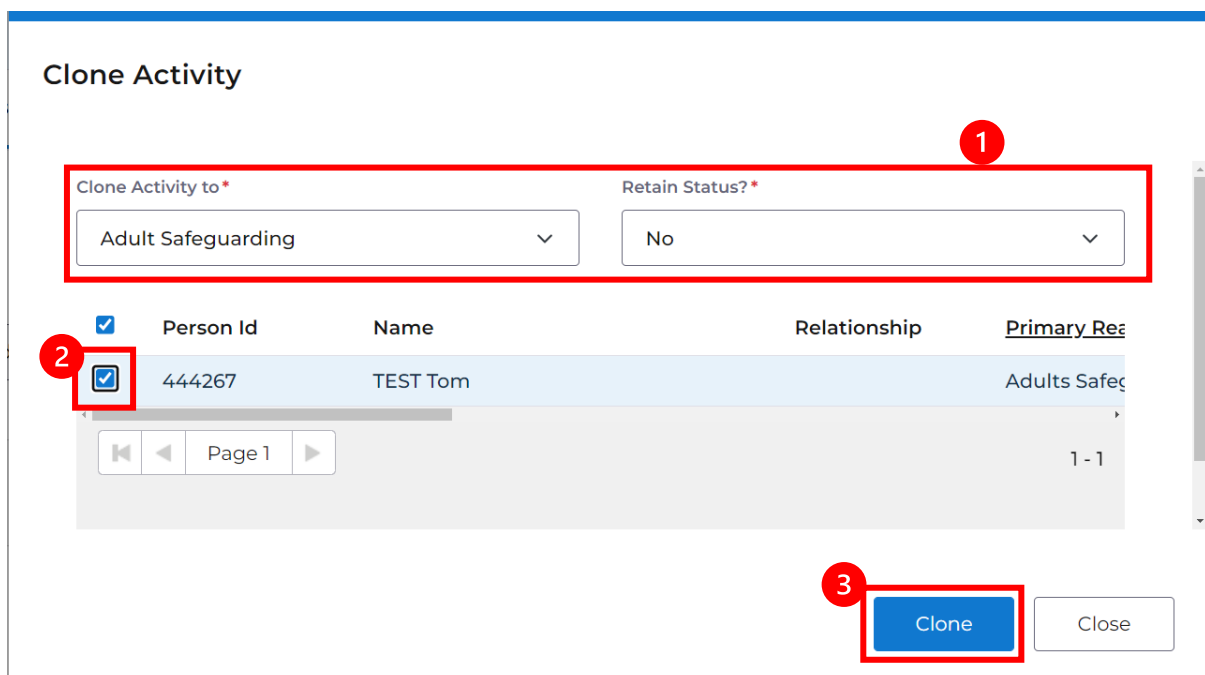
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

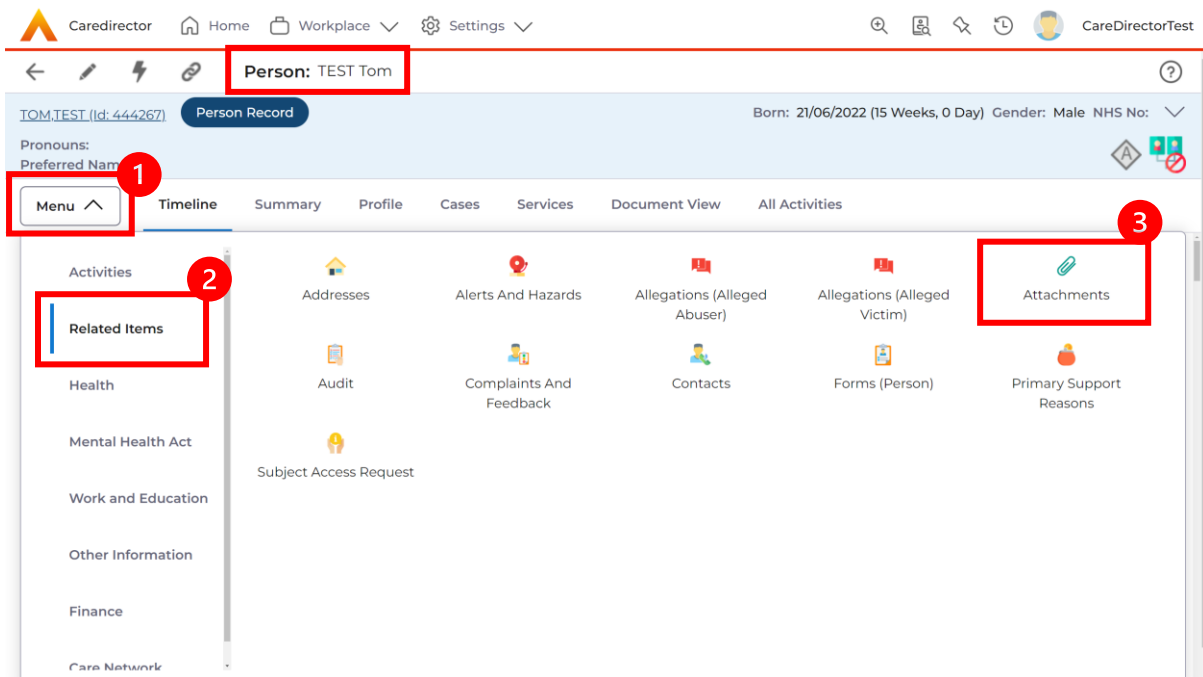


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

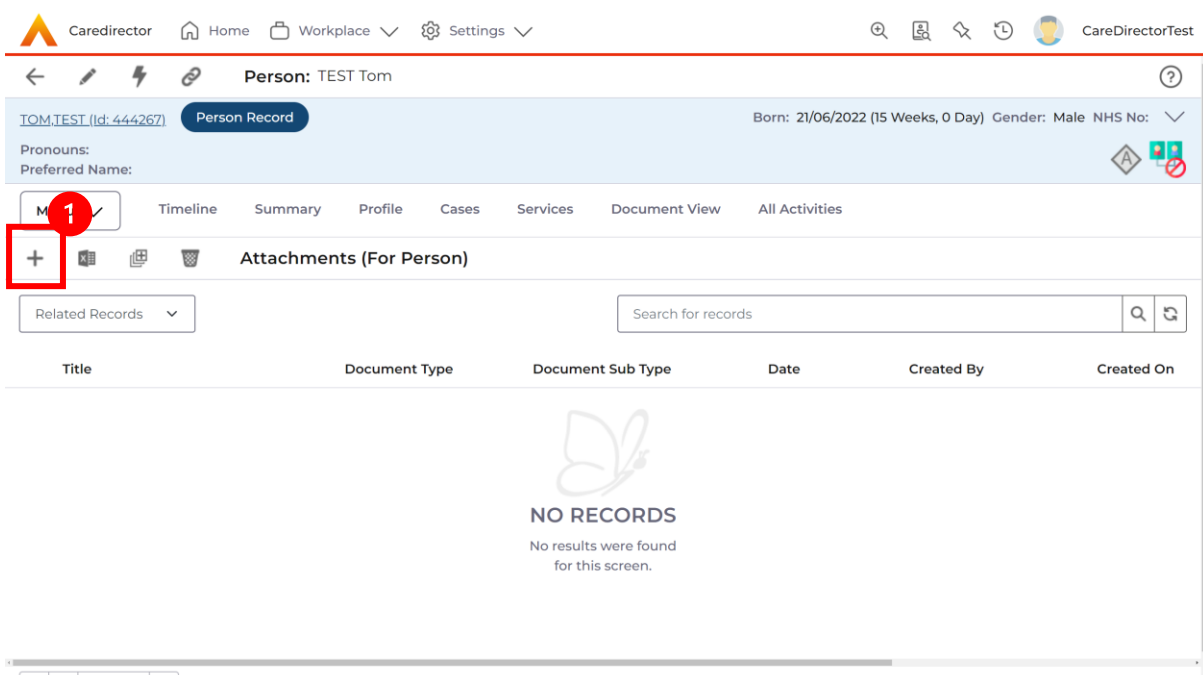


How to upload Attachments

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

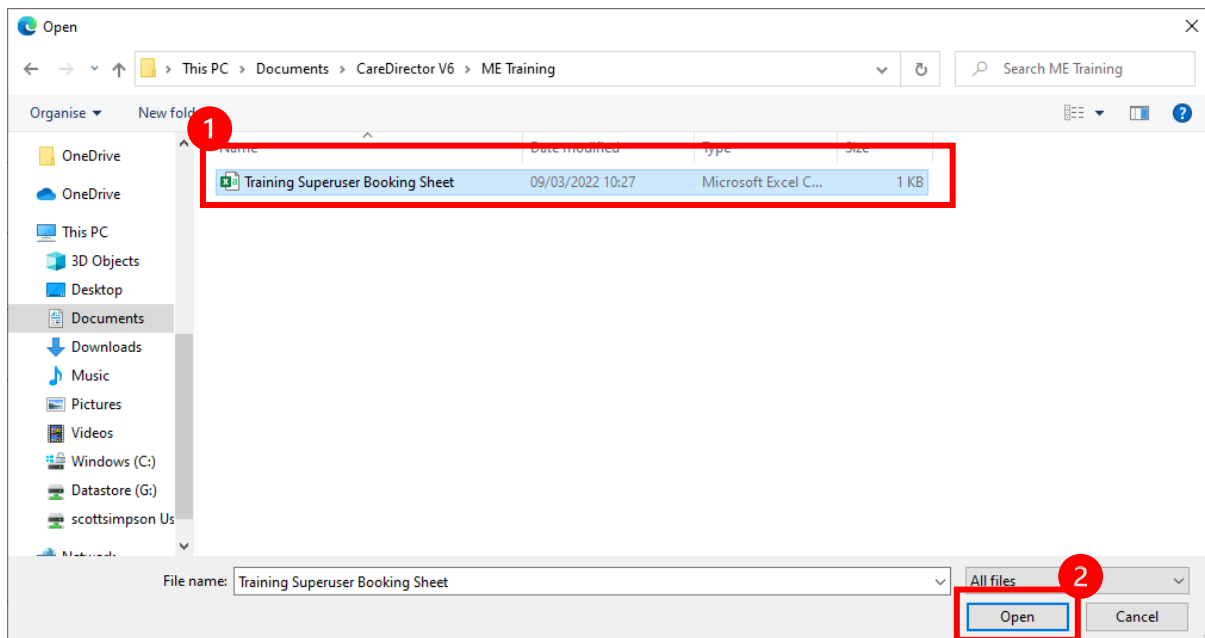


2. When opened, select the **Create New Record** from the toolbar.



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

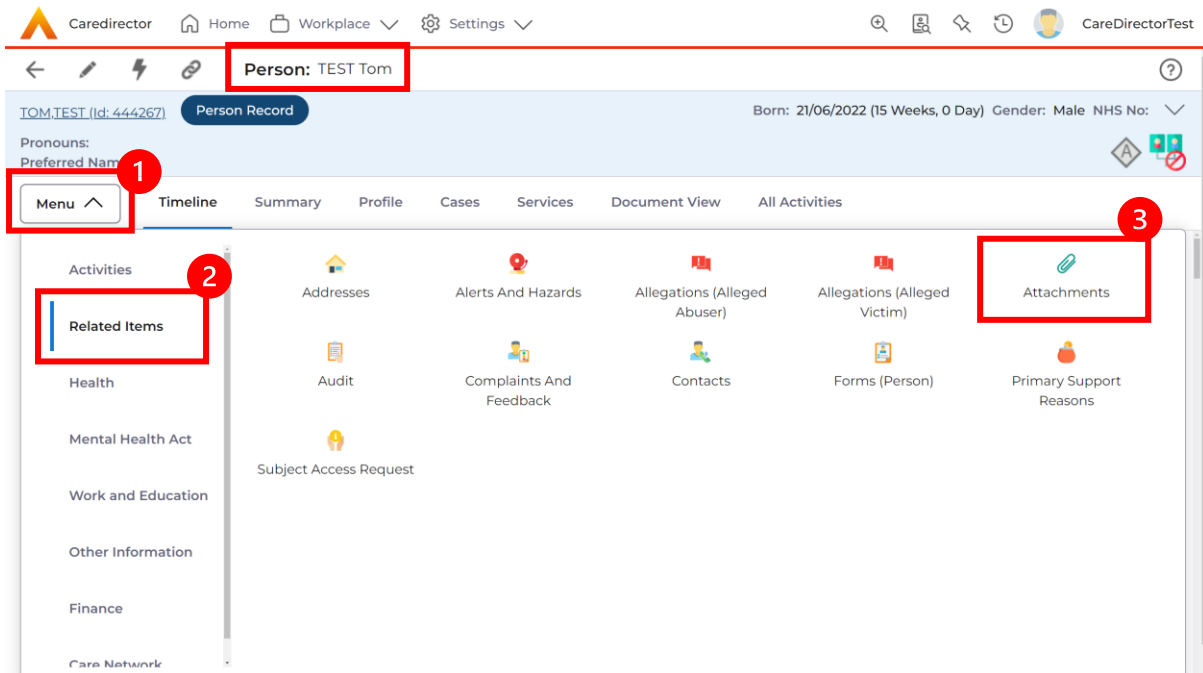
4. Select a **File** from your computer/ SharePoint and select **Open**.



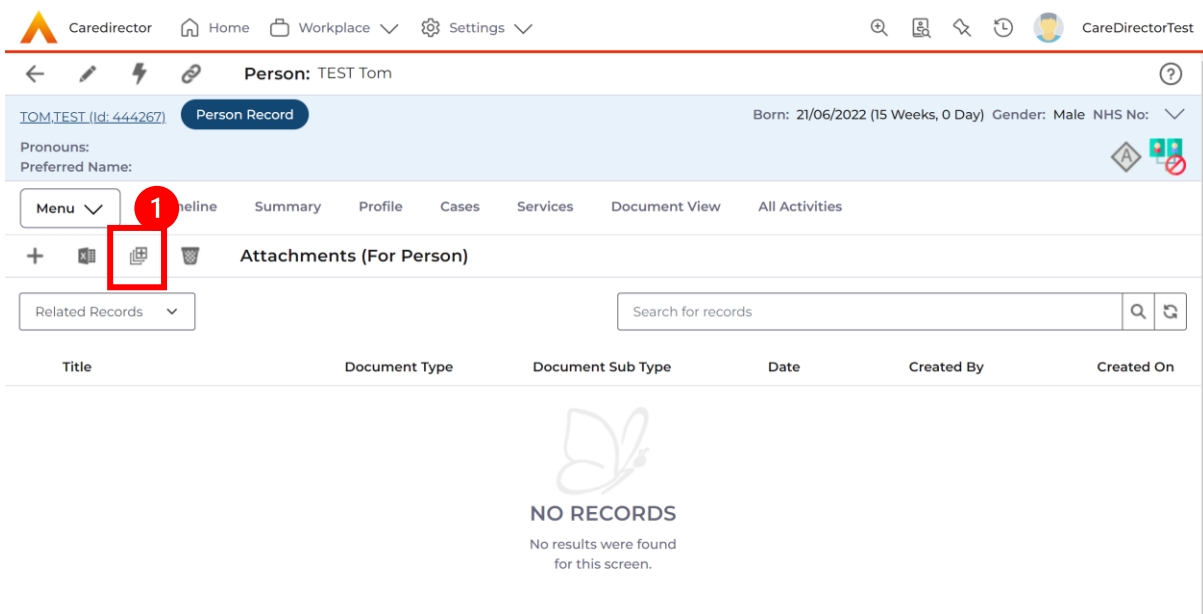
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

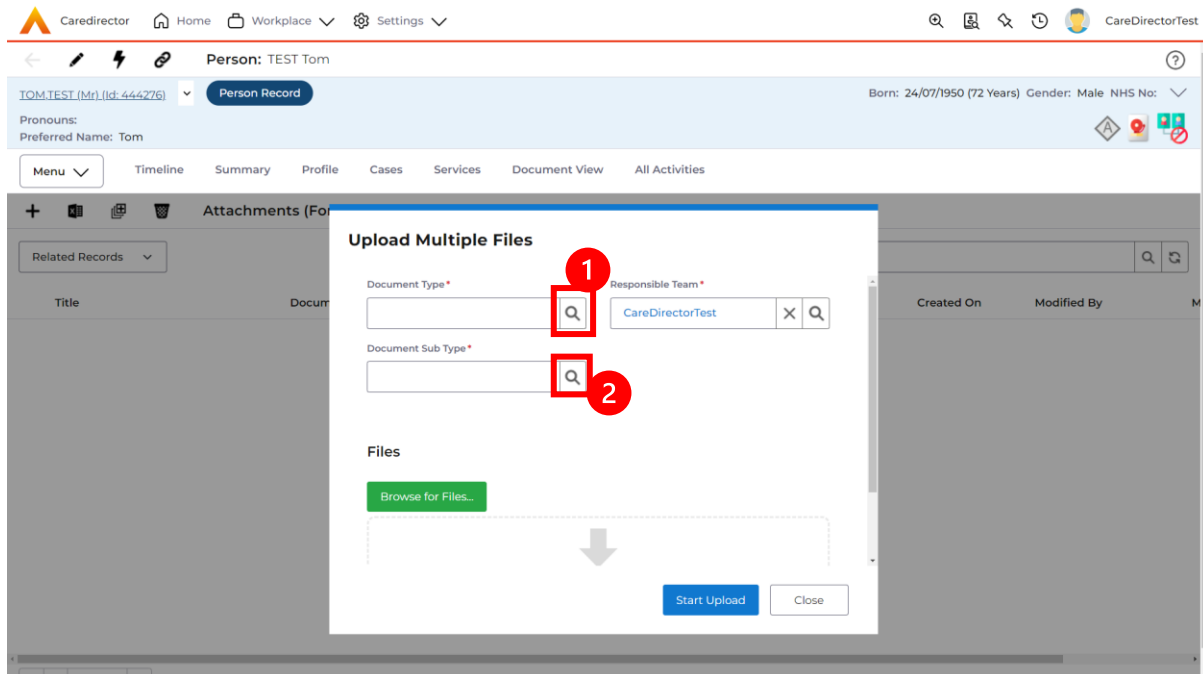
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



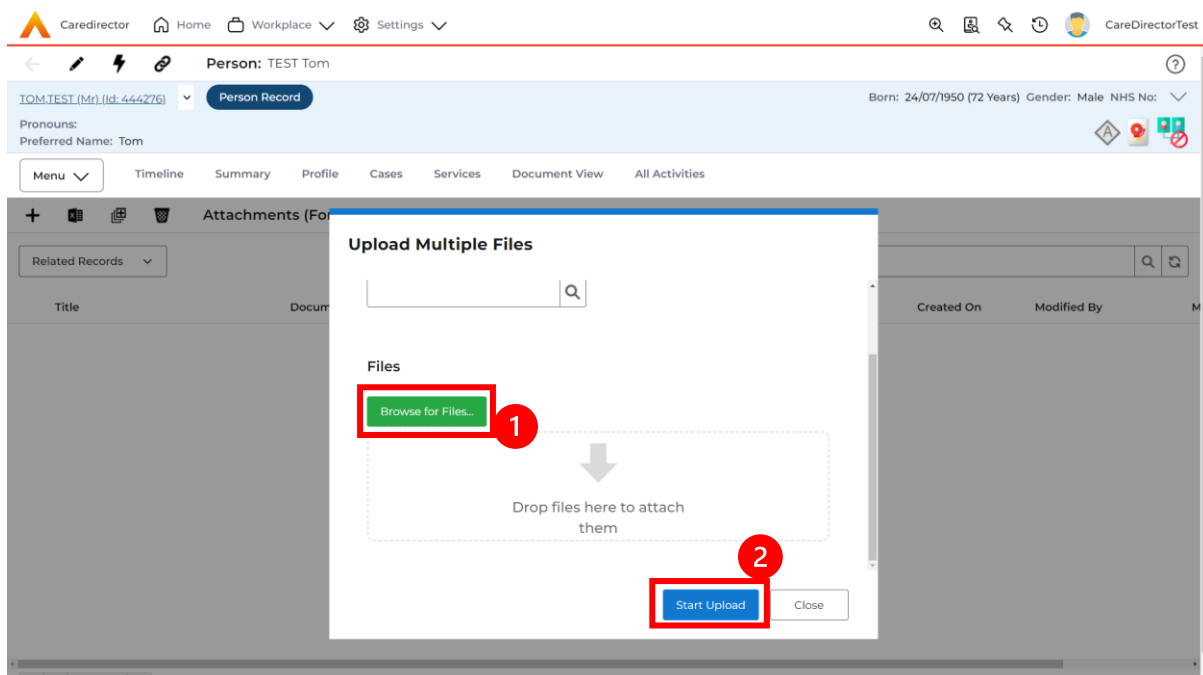
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



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

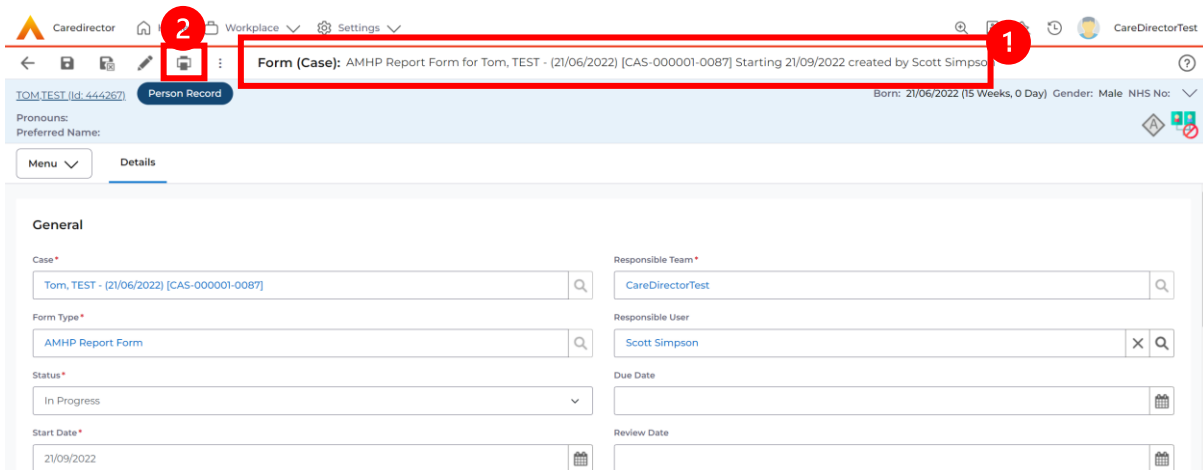


- If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When done,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

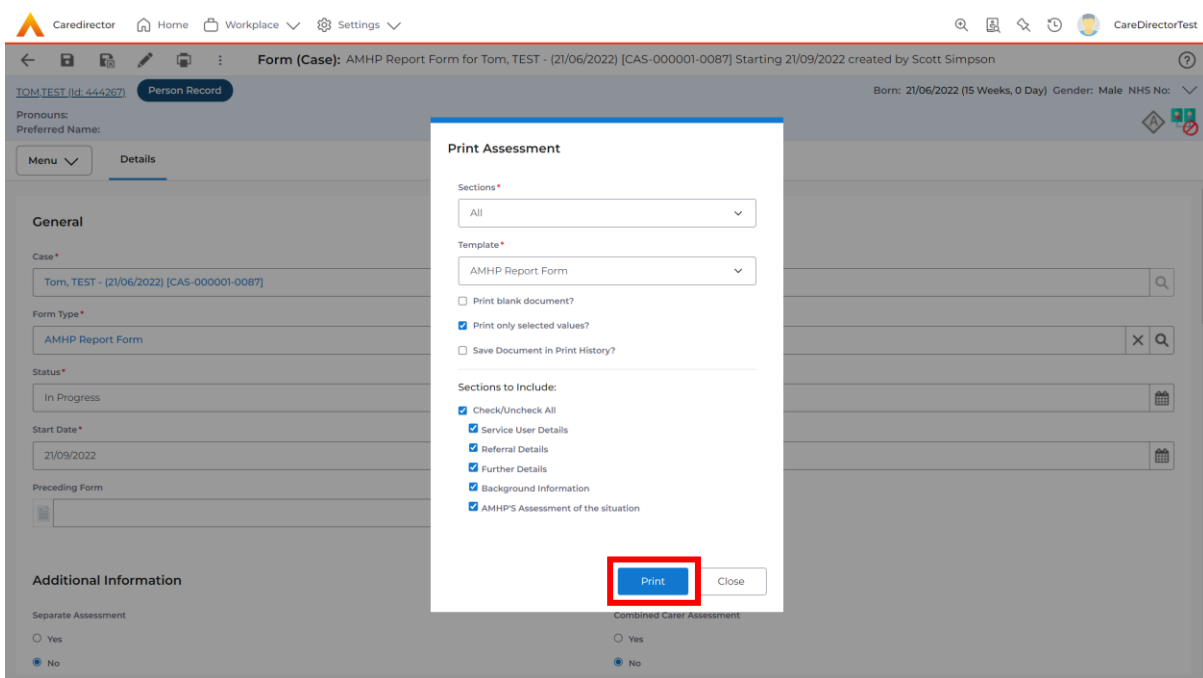


How to Print

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**.



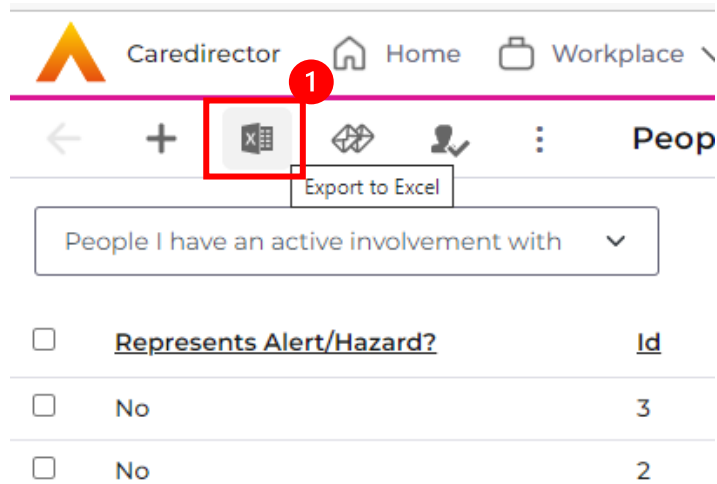
4. Please note: Activities will need to be printed from the **Person Record** under the tab **All Activities**

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header displays 'Person: TEST Tom' (highlighted with a red box and number 1). Below this, the person's details are shown: 'TOM TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (15 Weeks, 0 Day)', and 'Gender: Male NHS No:'. A menu bar contains 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities' (highlighted with a red box and number 1). The 'All Activities' section is active, showing a search filter input field (highlighted with a red box and number 2) and a table of activities. The table has columns: 'Regarding', 'Subject', 'Activity', 'Status', 'Start/Due Date', 'Actual End', 'Case note', and 'Regarding Type'. Two activities are listed:

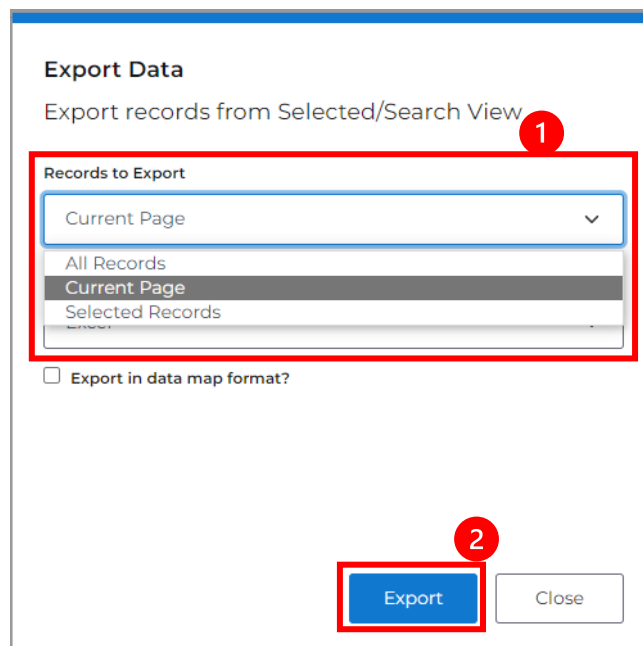
Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case note	Regarding Type
<input checked="" type="checkbox"/>	TEST Tom \ Pers...	PB Cash Direct ...	Task	Open	28/09/2022 00:0...	No	Service Provision
<input type="checkbox"/>	Tom, TEST - (21/0...	Referral has bee...	Task	Open	21/09/2022 15:25...	No	Case

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**.



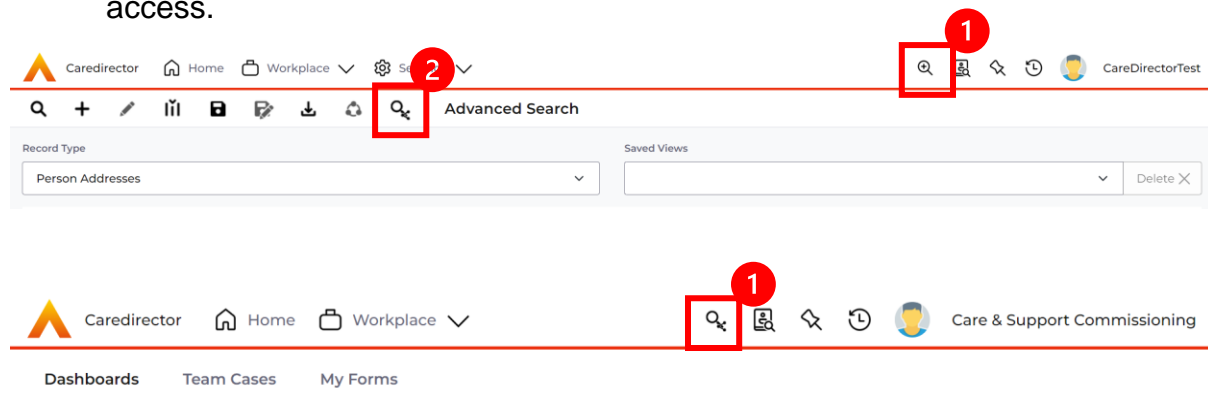
3. **All Records** will export all records on the summary screen or record chosen.
4. **Current Page** will export all available records on the page chosen.
5. **Selected Records** are records that have been selected by the checkbox. Then only those selected will be exported.

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)**.

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

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

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is visible. The 'Forms (Case)' menu item is selected, and the 'Related Records' dropdown is open. A table of related records is displayed below.

<input type="checkbox"/>	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

How to add a Form

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

Person: TEST Tom

Person Record

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

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

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
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. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case)**.

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

Person Record

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

Menu ^ Timeline Details

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

Related Items Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

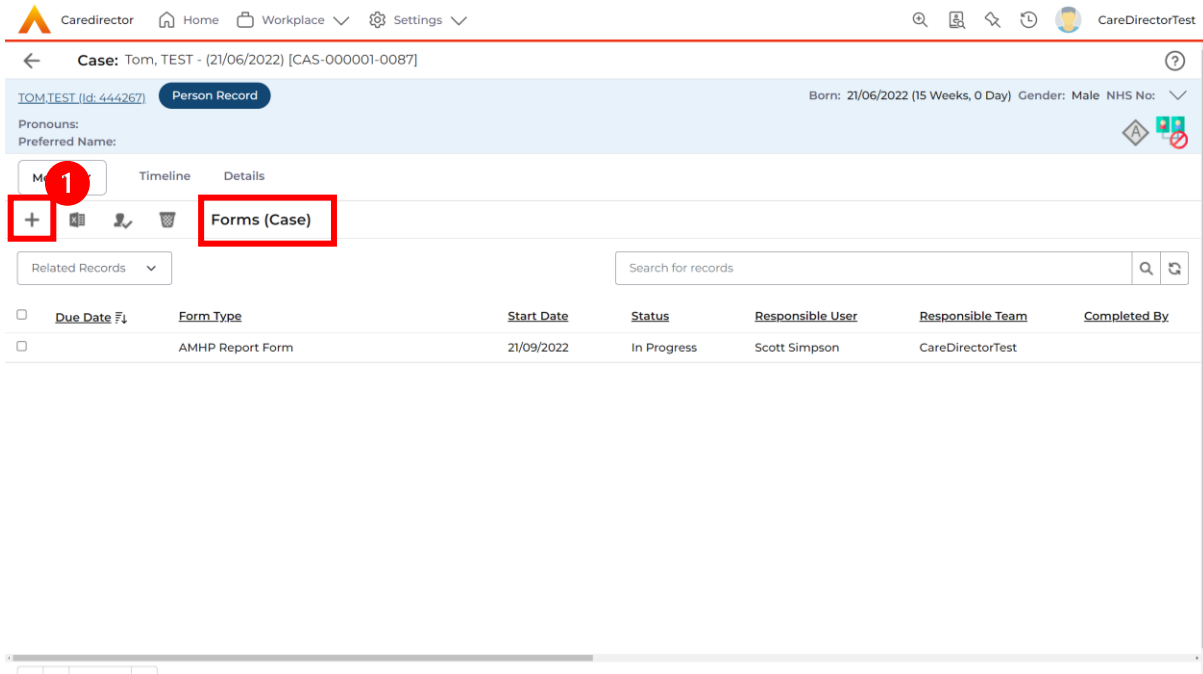
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

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

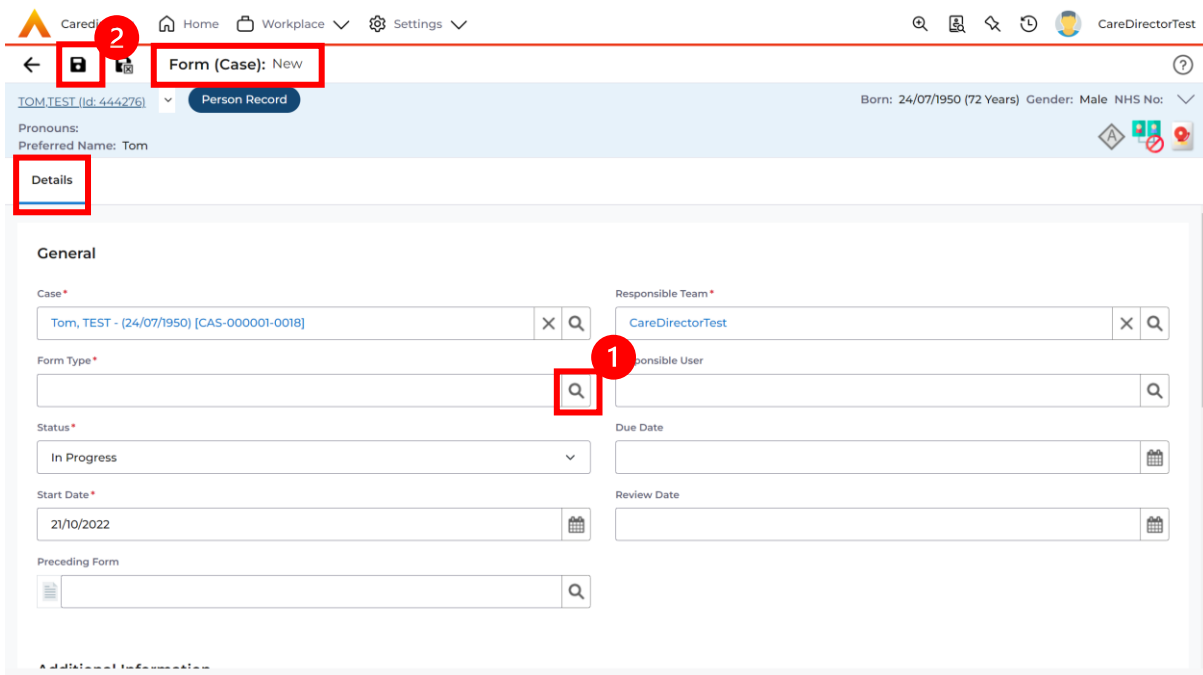
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational Therapist Start Date: 21/09/2022

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



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



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

The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022)". A red circle with the number "1" highlights the "Edit" button in the top toolbar. The form fields are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0087]
Responsible Team *	CareDirectorTest
Form Type *	AMHP Report Form
Responsible User	Scott Simpson
Status *	In Progress
Due Date	
Start Date *	21/09/2022
Review Date	
Preceding Form	

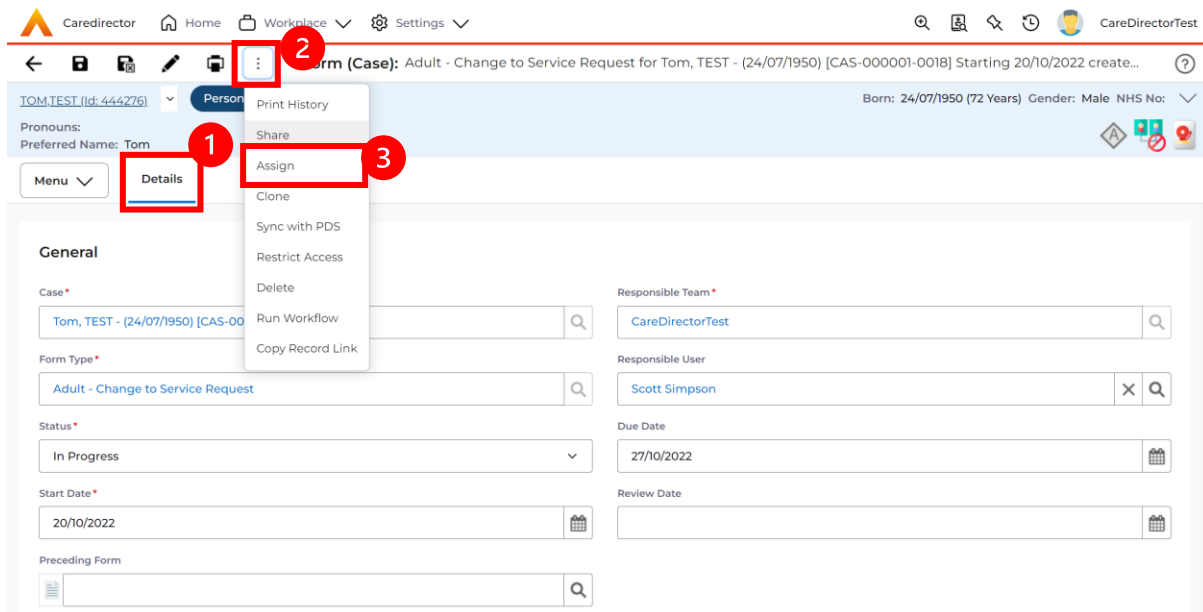
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

The screenshot shows the CareDirector interface for the "AMHP Report Form". A red circle with the number "1" highlights the "Save and Return to Previous Page" button in the top toolbar. The form fields are as follows:

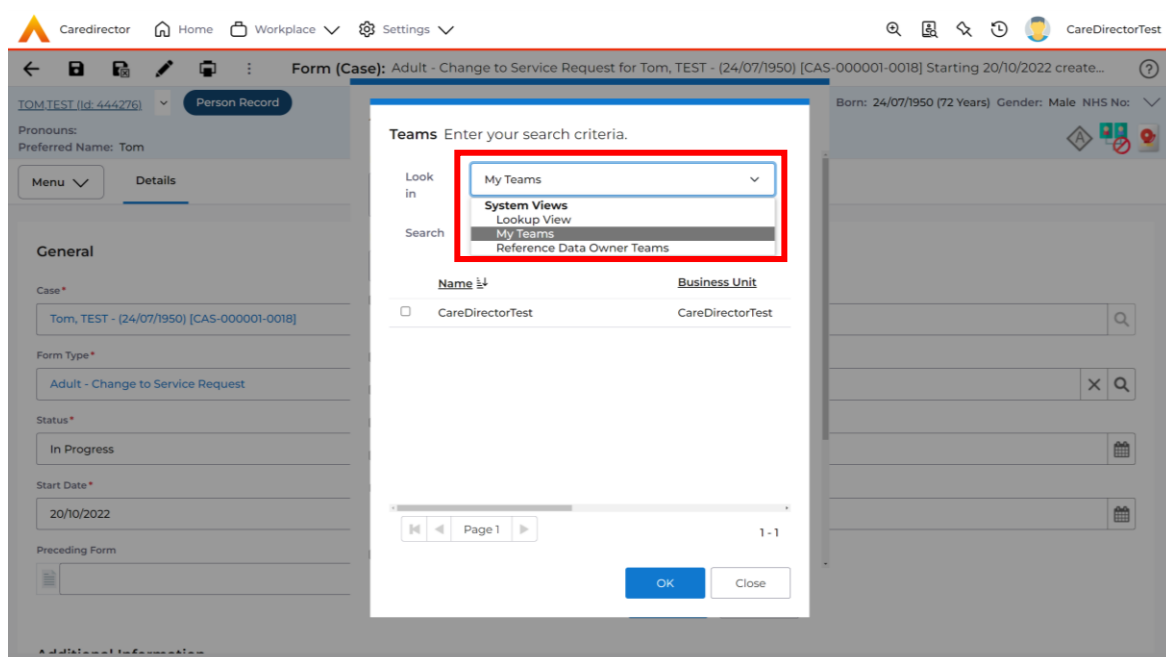
Field	Value
Client previously known to services?	<input type="radio"/> Yes <input type="radio"/> No
Ethnic Origin	<input type="radio"/> White - British / Northern Irish <input type="radio"/> White - Irish <input type="radio"/> White - Gypsy or Irish Traveller <input type="radio"/> White - Eastern European <input type="radio"/> Mixed - White and Black African <input type="radio"/> Mixed - White and Black Caribbean <input type="radio"/> Mixed - White and Asian <input type="radio"/> Mixed - Other / Multiple

How to Allocate a Form

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



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



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

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

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

How to Clone a Form

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

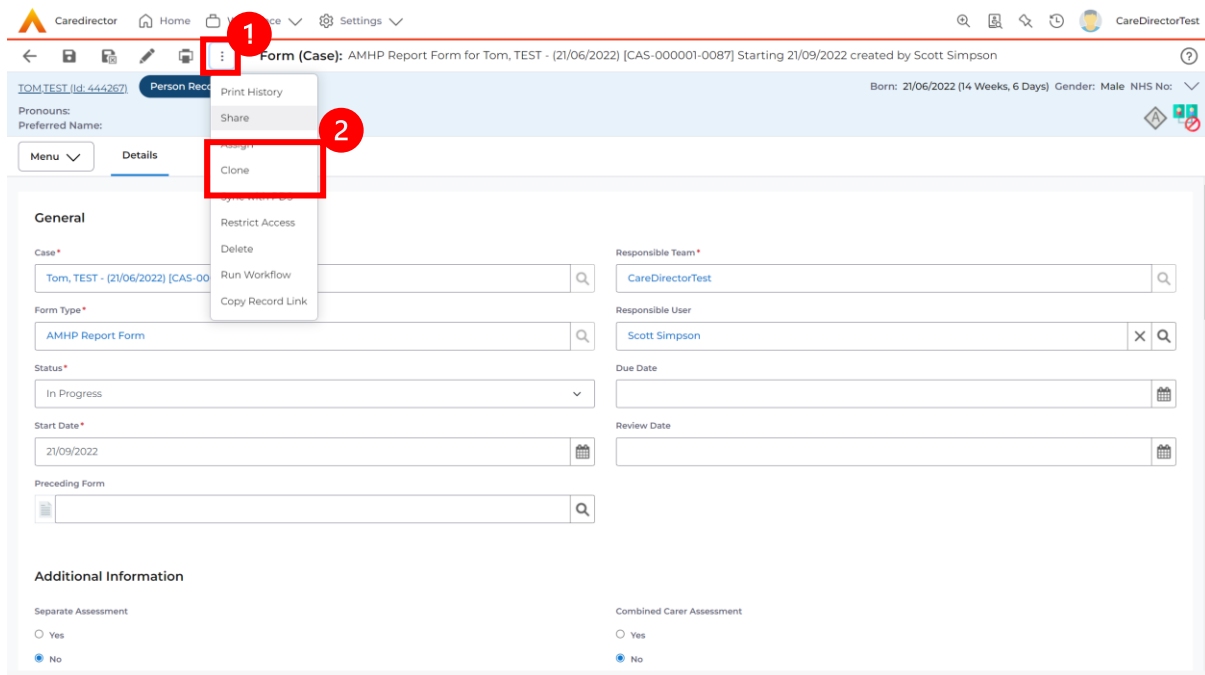
The screenshot shows the CareDirector interface for a case record. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' sub-menu. The main content area shows a timeline of events: 'Form (Case) Created' (21/09/2022 13:04:25), 'Case Involvement Updated' (21/09/2022 12:23:12), and 'Case Involvement Created' (21/09/2022 12:17:20).

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

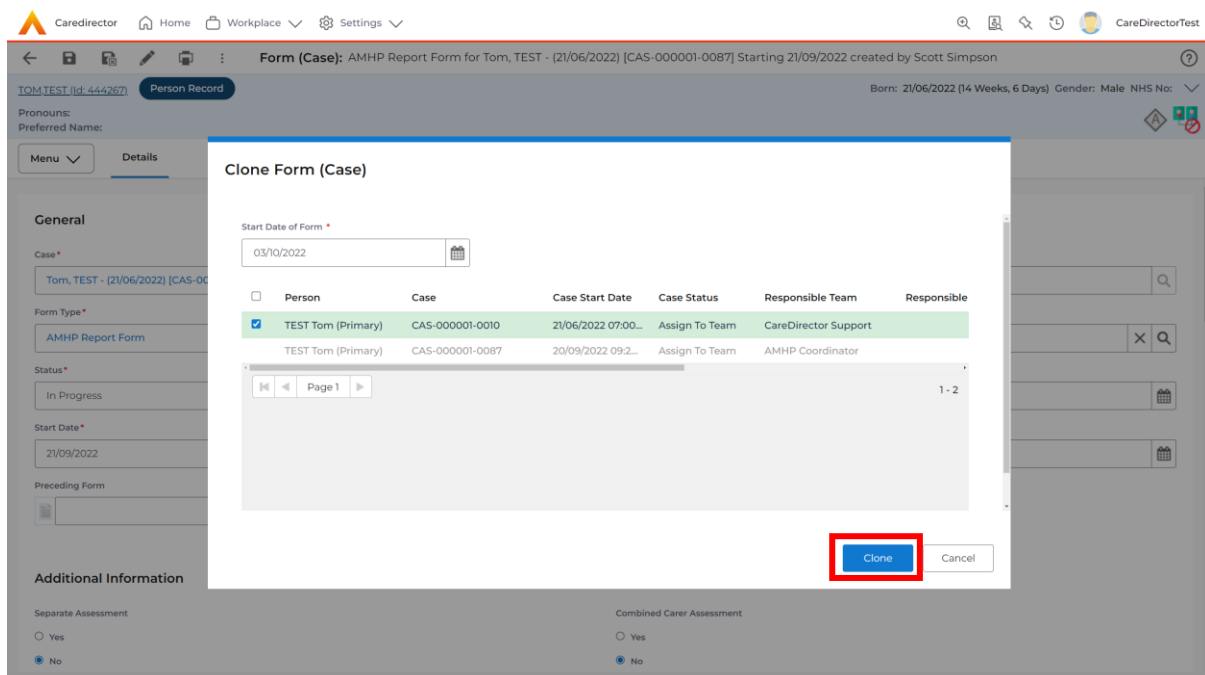
The screenshot shows the 'Forms (Case)' table in the CareDirector interface. The table has columns for 'Due Date', 'Form Type', 'Start Date', 'Status', 'Responsible User', 'Responsible Team', 'Completed By', and 'Completion Date'. One record is visible: 'AMHP Report Form' with a start date of '21/09/2022' and status 'In Progress'.

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			

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



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



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

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

The screenshot shows the 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...' page in the CareDirector system. The interface includes a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is identified as 'CD V6 Team'. The form details are as follows:

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

How to reactivate a Closed Form

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area shows the form details for 'Tom, TEST (id: 444267)'. The form is currently in a 'Closed' status. The 'Form Type' is 'Occupational Therapy Conversation Record'. Other fields include 'Responsible Team' (CareDirectorTest), 'Responsible User' (Scott Simpson), 'Due Date' (20/12/2022), and 'Start Date' (10/11/2022).

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

This screenshot shows the same form as the previous one, but with the three dots menu icon highlighted by a red circle with the number '1'. The dropdown menu is open, and the 'Activate' option is highlighted by a red circle with the number '2'. Other options in the menu include 'Share', 'Assign', 'Clone', 'Restrict Access', 'Delete', 'Run Workflow', and 'Copy Record Link'. The form details remain the same as in the previous screenshot.

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**.

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this, the breadcrumb trail shows 'Person: TEST Tom'. The main header area displays 'TOM,TEST (Id: 444267)' and 'Person Record'. The 'Services' tab is highlighted with a red box and a red circle containing the number '1'. The main content area shows a timeline for 'SEP 2022' with three entries: 'Task Created', 'Form (Case) Created', and 'Case Involvement Updated'. A filter sidebar is visible on the left.

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.

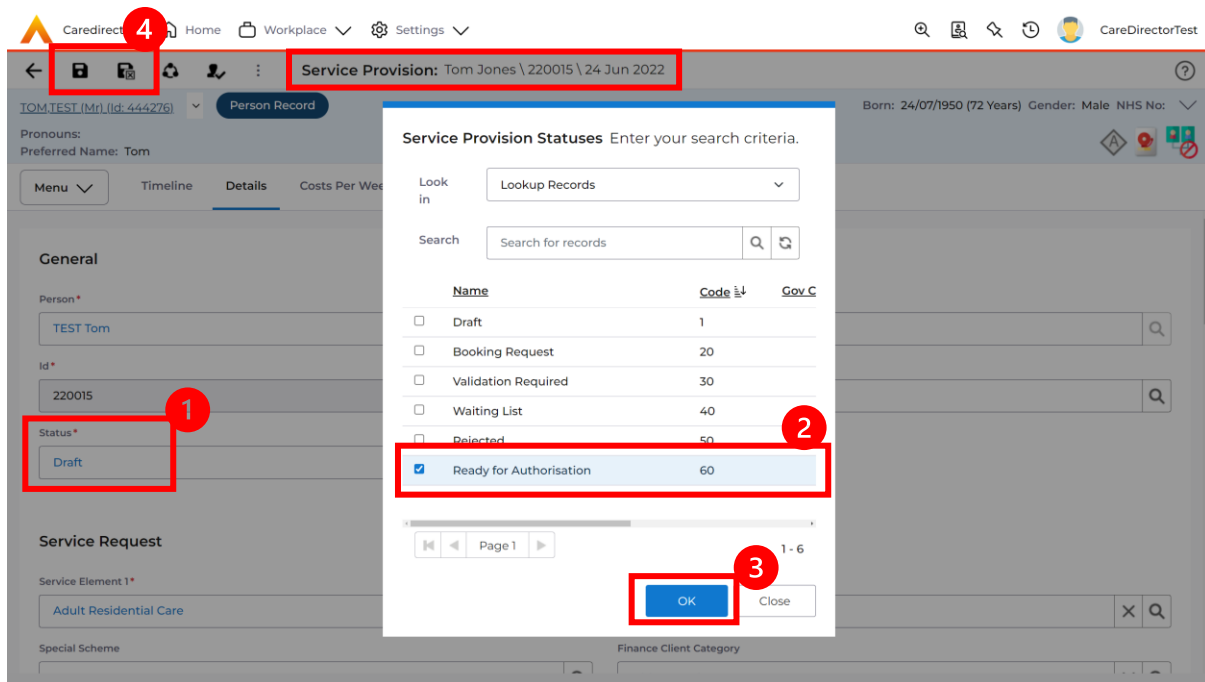
This screenshot shows the 'Service Provisions' view within the CareDirector interface. The 'Services' tab is still selected. In the toolbar below the tabs, a red box highlights a '+' icon, which is the 'Create New Record' button, with a red circle containing the number '2'. Below the toolbar, there is a search bar and a table of service provisions.

Id	Person	Id [Person]	Status	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Eleme
220022	TEST Tom	444267	Draft	08/08/2022				Adult Residen

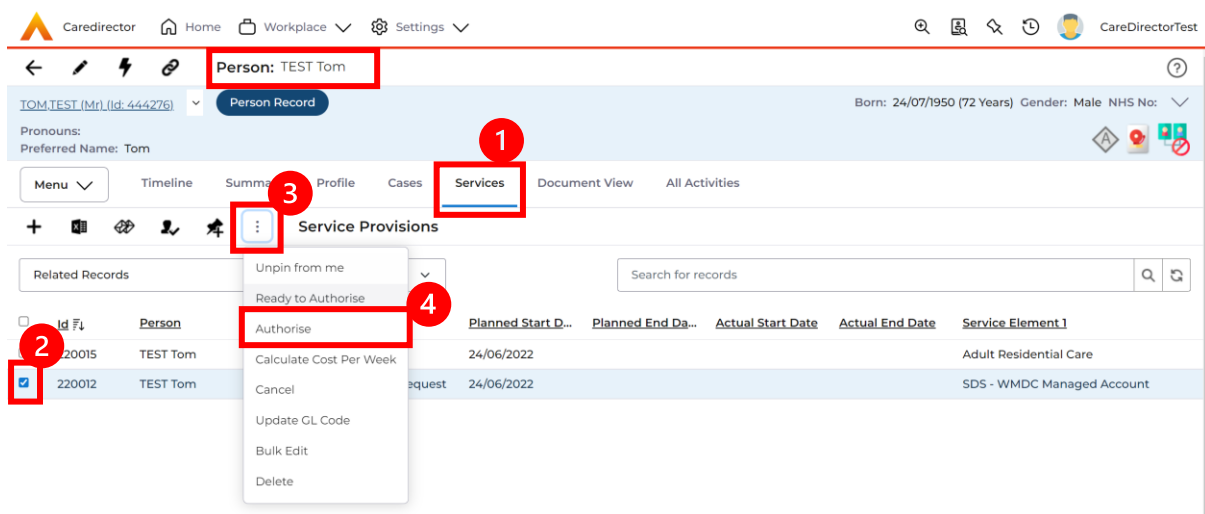
4. Then follow the appropriate section to complete the **Service Provision**.

How to Authorise a Service Provision

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



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



How to input Service Deliveries

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

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022'. The main content area shows a 'Person Record' for 'MULLENTEST, Tom (Id: 444264)'. The 'Service Deliveries' tab is selected and highlighted with a red box and a red circle containing the number '1'. In the toolbar below the tabs, the '+ Create New Record' button is highlighted with a red box and a red circle containing the number '2'. Below the toolbar is a search bar for records and a table header with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and Wedr. The table content is empty, displaying 'NO RECORDS' and 'No results were found for this screen.'

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

Caredirector Home Workplace Settings CD V6 Team

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

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

Pronouns: Preferred Name:

Menu Details Variations

General

Service Provision *

Responsible Team *

Id *

Rate Unit *

Planned Start Time *

Units *

Total Visits *

Total Units *

Number of Carers *

Schedule applies to days

Select All * Yes No

Monday * Yes No

Tuesday * Yes No

Wednesday * Yes No

Thursday * Yes No

Friday * Yes No

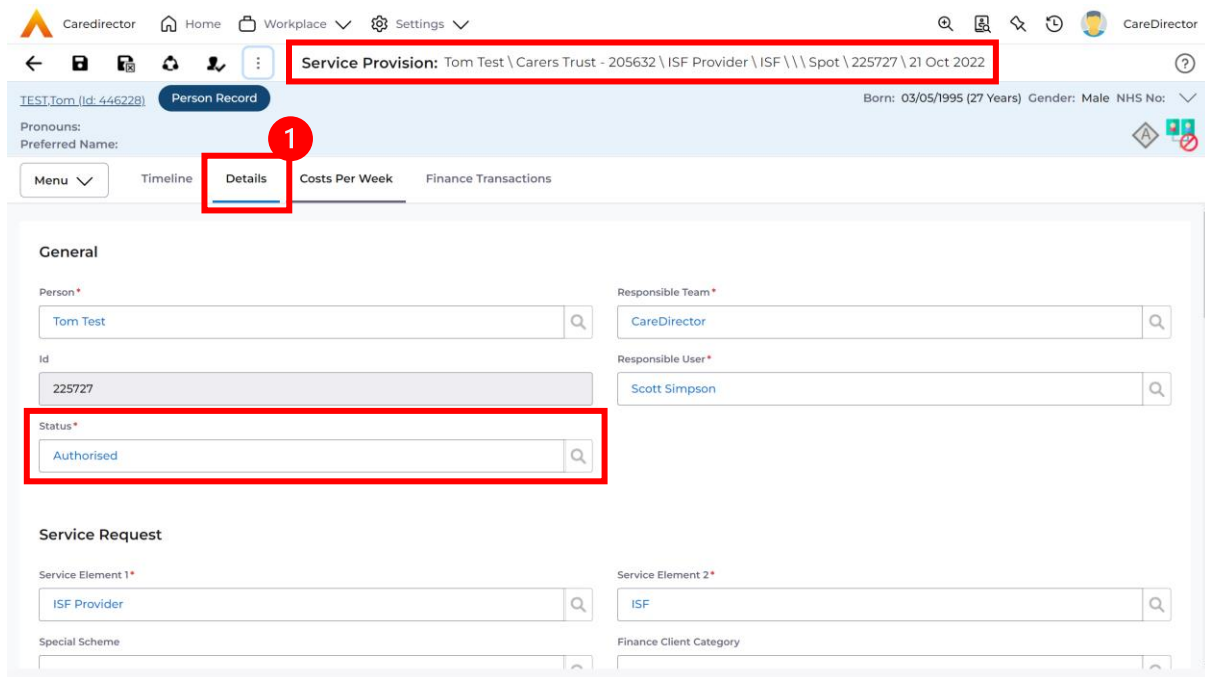
Saturday * Yes No

Sunday * Yes No

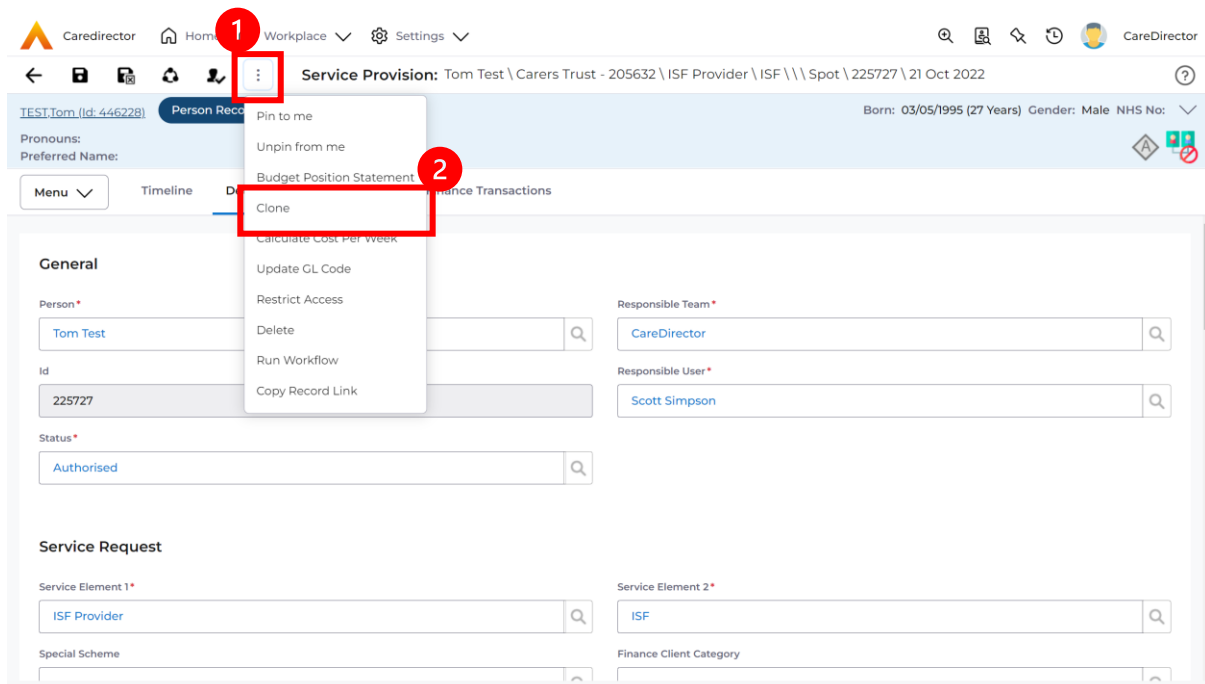
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

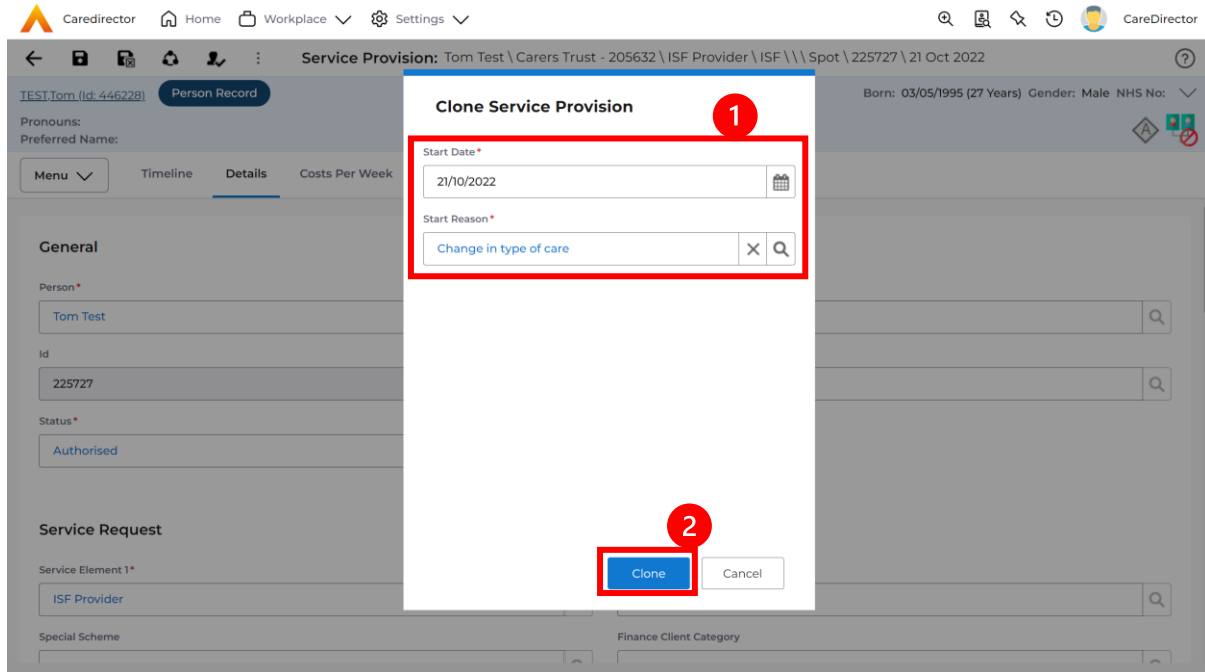
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



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



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



How to End Service Provisions

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

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

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

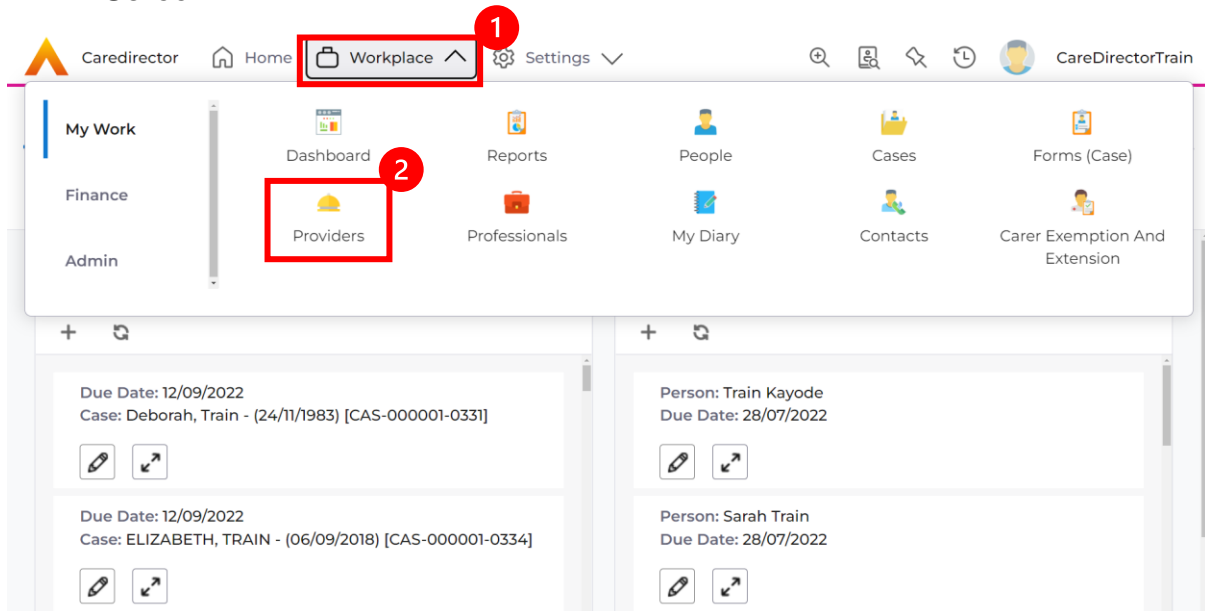
The 'Commissioning' section contains the following fields:

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

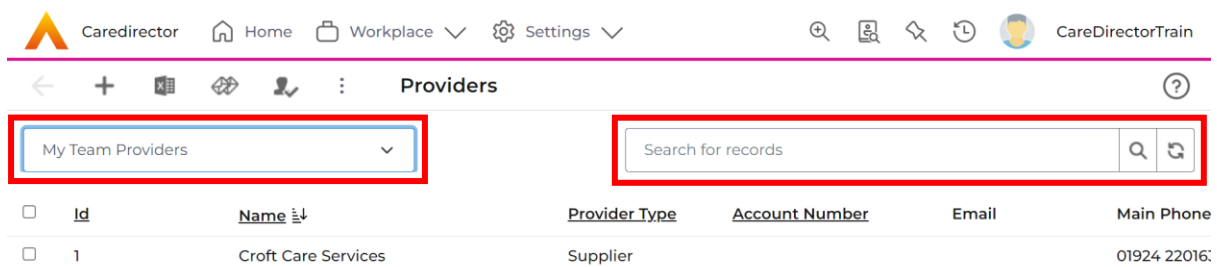
Red annotations in the image include a box around the top navigation icons (with a '2' in a red circle), a box around the 'Actual End Date' and 'End Reason' fields (with a '1' in a red circle), and a box around the 'Actual End Date' field.

How to search for a Provider

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

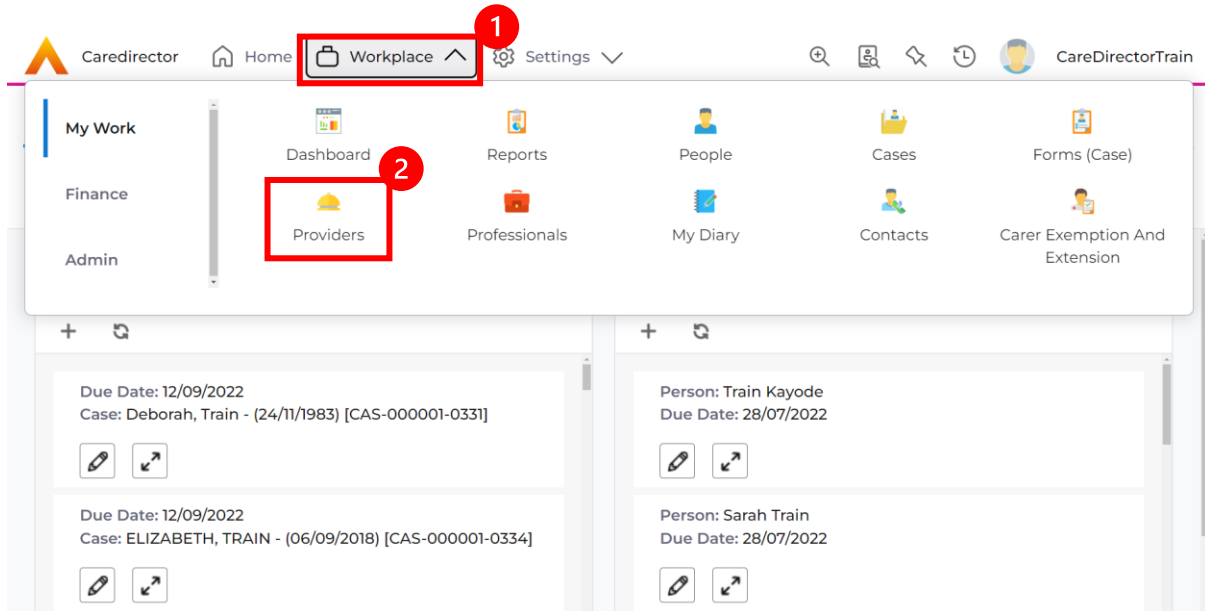


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard * for help during searches. When found, select the one you need.

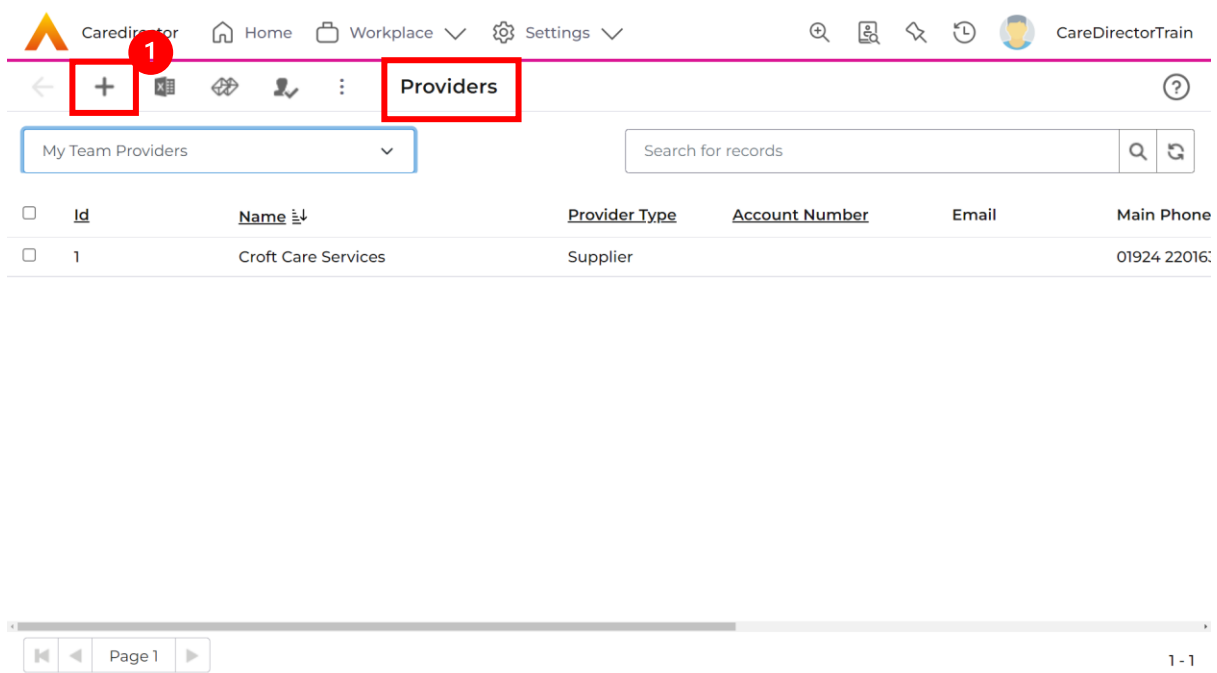


How to set up a new Provider

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



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



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

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

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

How to add a Service Type

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

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

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

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

The screenshot shows the 'Service Provided: New' creation screen. The 'General' tab is selected. The 'Provider' dropdown menu is highlighted with a red box and a circled '1'. The 'General' tab is also highlighted with a red box and a circled '2'. The form contains several fields for creating a new service provided record.

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

The screenshot shows the 'Service Provided Rate Periods' screen. The 'Rate Periods' tab is selected. The '+' icon in the toolbar is highlighted with a red box and a circled '2'. The 'Rate Periods' tab is also highlighted with a red box and a circled '1'. The screen shows a dropdown menu for 'Approved Rate Periods'.

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

The screenshot shows the 'Service Provided Rate Period: New' form in the CareDirector system. The 'General' tab is active and highlighted with a red box and the number '1'. The form contains several input fields: 'Service Provided*' (Test Provider \ SDS - Managed Account \ Home Care \ \ \ Spot), 'Responsible Team*' (CareDirectorTest), 'Rate Unit*' (Per Week Pro Rata), 'Approval Status*' (Pending), 'Start Date*' (11/10/2022), and 'End Date*'. In the top toolbar, the 'Save' icon is highlighted with a red box and the number '2'.

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

The screenshot shows the 'Service Provided Rate Schedules' page in the CareDirector system. The 'Rate Schedules' tab is active and highlighted with a red box and the number '1'. The page title is 'Service Provided Rate Schedules'. Below the title, there is a search bar and a table header with columns: 'Service Provide...', 'Rate', 'Rate Bank Holid...', 'Rate Per Unit', 'Time Band Start', 'Time Band End', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'. A 'NO RECORDS' message is displayed in the center of the page. In the top toolbar, the 'Create New Record' icon (a plus sign) is highlighted with a red box and the number '2'.

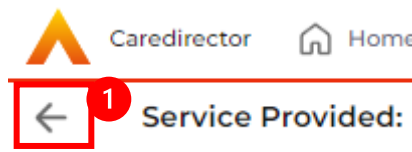
- Enter the appropriate **Rate** (you do not have to select days when the **Rate Unit** is **Per Week Pro Rata**). Select **Save and Return to Previous Page** on the toolbar.

The screenshot shows the 'Service Provided Rate Schedule: New' form. The 'General' section contains the following fields:

- Service Provided Rate Period***: Test Provider \ Test Provider \ SDS - Managed Account \ Home Care \ \ Spot \ Per Week Pro Rata \ \ O...
- Responsible Team***: CareDirectorTest
- Rate***: £ (highlighted with a red box and a '2' callout)
- Service Provided***: Test Provider \ SDS - Managed Account \ Home Care \ \ Spot (highlighted with a red box and a '1' callout)

There is also a 'Notes' section with a text area.

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



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

The screenshot shows the 'Service Provided: Test Provider \ SDS - Managed Account \ Home Care \ \ Spot' page. The 'Service Finance Settings' tab is highlighted with a red box and a '1' callout. The 'Create New Record' button (represented by a '+' icon) is highlighted with a red box and a '2' callout.

The page displays a table with the following columns:

Service Provided	Start Date	End Date	Payment Type	Provider Batch ...	VAT Code	Adjusted Days	Aggregate on In...	End Reason Ru...	Used in Batch S...
------------------	------------	----------	--------------	--------------------	----------	---------------	--------------------	------------------	--------------------

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.

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

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

The screenshot shows the 'Service Provided' page for a 'Test Provider'. The 'Rate Periods' tab is selected, and a table of 'Service Provided Rate Periods' is displayed. A red box highlights the 'Pending Rate Periods' dropdown menu (2), and another red box highlights the 'Rate Periods' tab (1). A third red box highlights the first row of the table, which has an approval status of 'Pending' (3).

Rate Unit	Approval Status	Start Date	End Date	Capacity	Capacity Can Be	Service Provided
Per Week Pro Ra...	Pending	11/10/2022			No	Test Provider \ SDS - Managed Accou...

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

The screenshot shows the 'Service Provided Rate Period' details page. The 'Approval Status' dropdown menu is open, and 'Approved' is selected. A red box highlights the 'Approval Status' dropdown menu (1), and another red box highlights the 'Save' button in the toolbar (2).

General

Service Provided*
Test Provider \ SDS - Managed Account \ Home Care \ \ \ Spot

Rate Unit*
Per Week Pro Rata

Start Date*
11/10/2022

Responsible Team*
CareDirectorTest

Approval Status*
Pending

Approved
Cancelled
Pending

CREATED BY
Scott Simpson

CREATED ON
11/10/2022 15:27:43

ACTIVE
Yes

MODIFIED BY
Scott Simpson

MODIFIED ON
11/10/2022 15:27:43

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

How to see Provider Service Provisions

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

The screenshot shows the Care Director interface. At the top, there are navigation links for 'Caredirector', 'Home', and 'Workplace'. On the right, there are search and user profile icons, and the text 'Care & Support Commissioning'. Below the navigation bar, the breadcrumb path is 'Provider: Test Provider'. Underneath, there is a dropdown menu for 'Test Provider (Id:193172)' and a 'Provider Record' button. A 'Type: Supplier' label is visible. A horizontal menu contains several tabs: 'Menu', 'Timeline', 'Summary', 'Details', 'Service Provisions', 'Services Provided', 'Suspensions', 'Service Delivery Variations', and 'Finance Transactions'. The 'Service Provisions' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tabs, there is a 'Service Provisions' section with a 'Related Records' dropdown and a search box. A table of records is displayed below.

<input type="checkbox"/>	Id	Person	Id.(Person)	Status	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1
<input type="checkbox"/>	220075	Test Tester	444265	Ready for Autho...			20/09/2022		SDS - Managed Account
<input type="checkbox"/>	220072	Test Tester	444265	Draft			12/09/2022		SDS - Managed Account
<input type="checkbox"/>	220071	Test Tester	444265	Authorised			14/09/2022		SDS - Managed Account

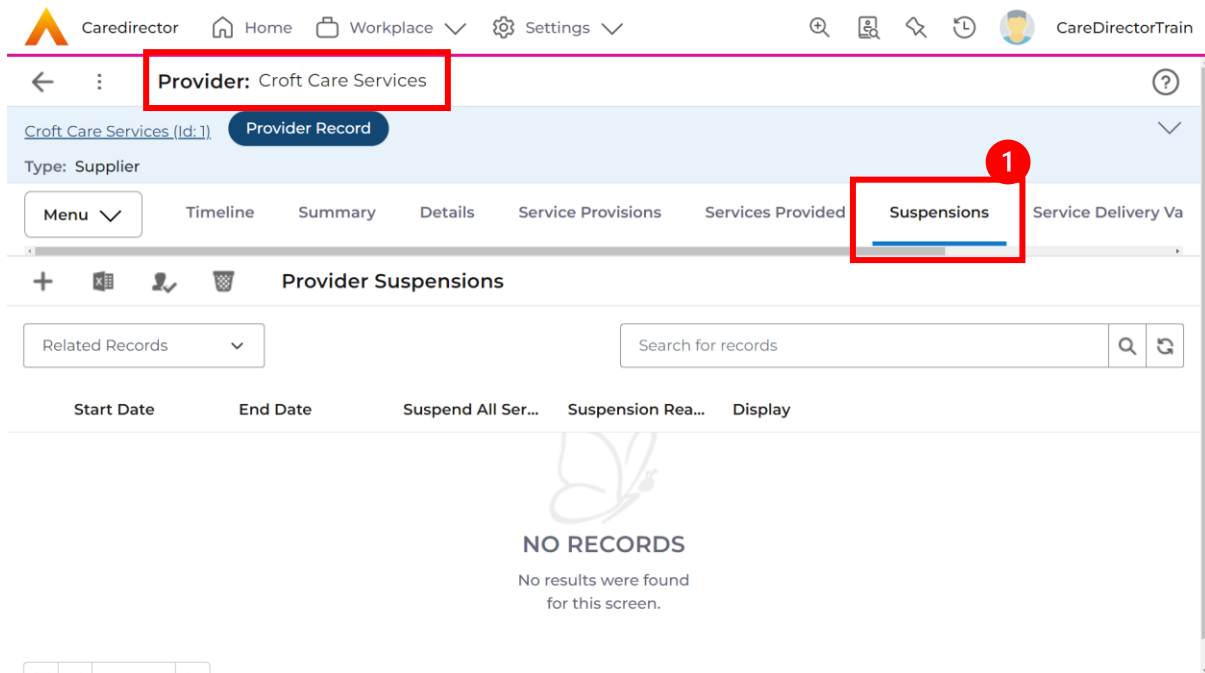
2. This will show information based around the **Service Provisions** that are undergoing under this **Provider**. Scroll across this page to see information based on the headings. Select a **Service Provision** to see more.

This screenshot is identical to the one above, showing the 'Service Provisions' tab selected. A red box highlights the header row of the table, which contains the following columns: Id, Person, Id.(Person), Status, Planned Start D..., Planned End Da..., Actual Start Date, Actual End Date, and Service Element 1.

<input type="checkbox"/>	Id	Person	Id.(Person)	Status	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1
<input type="checkbox"/>	220075	Test Tester	444265	Ready for Autho...			20/09/2022		SDS - Managed Account
<input type="checkbox"/>	220072	Test Tester	444265	Draft			12/09/2022		SDS - Managed Account
<input type="checkbox"/>	220071	Test Tester	444265	Authorised			14/09/2022		SDS - Managed Account

How to see Provider Suspensions

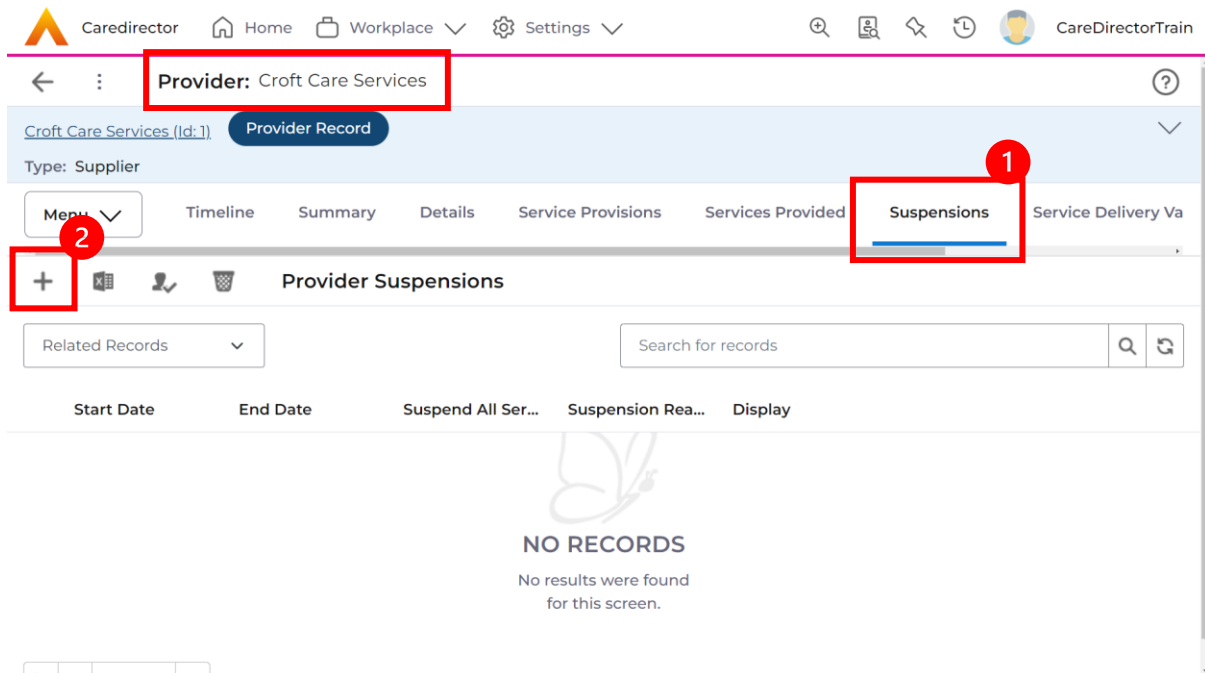
1. Locate the relevant **Provider**. Once on the **Provider** screen, select the **Suspensions** tab.



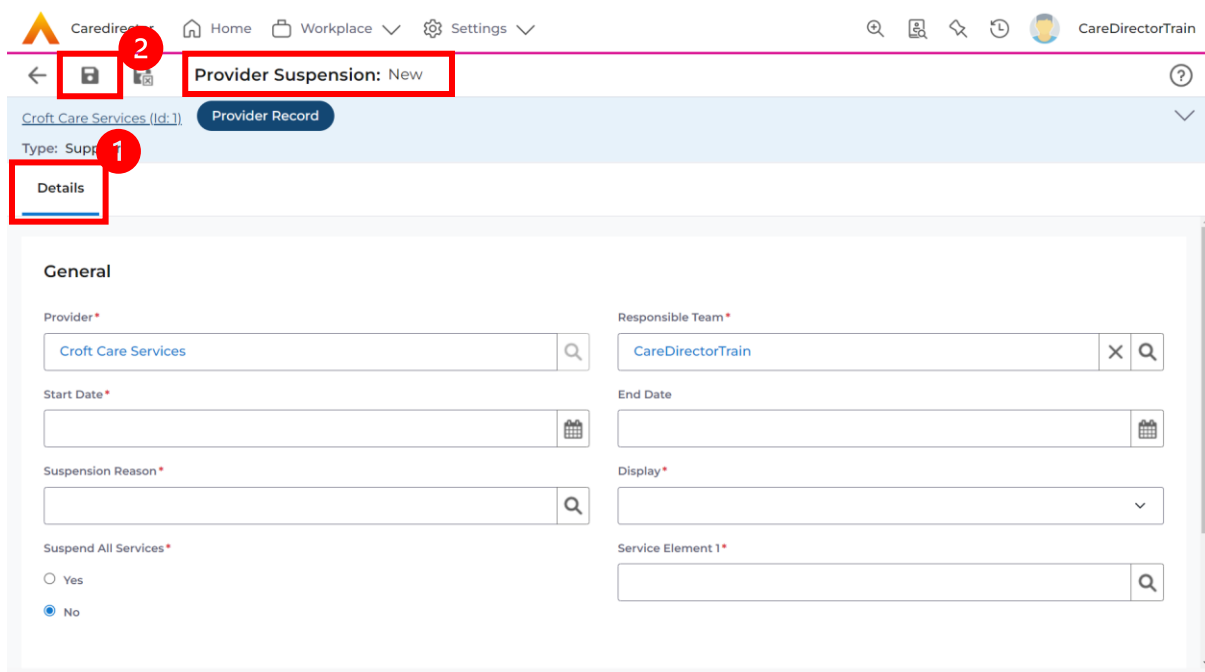
2. This will show a list of all **Suspensions** occurred on the **Provider**.

How to add a Suspension on a Provider

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



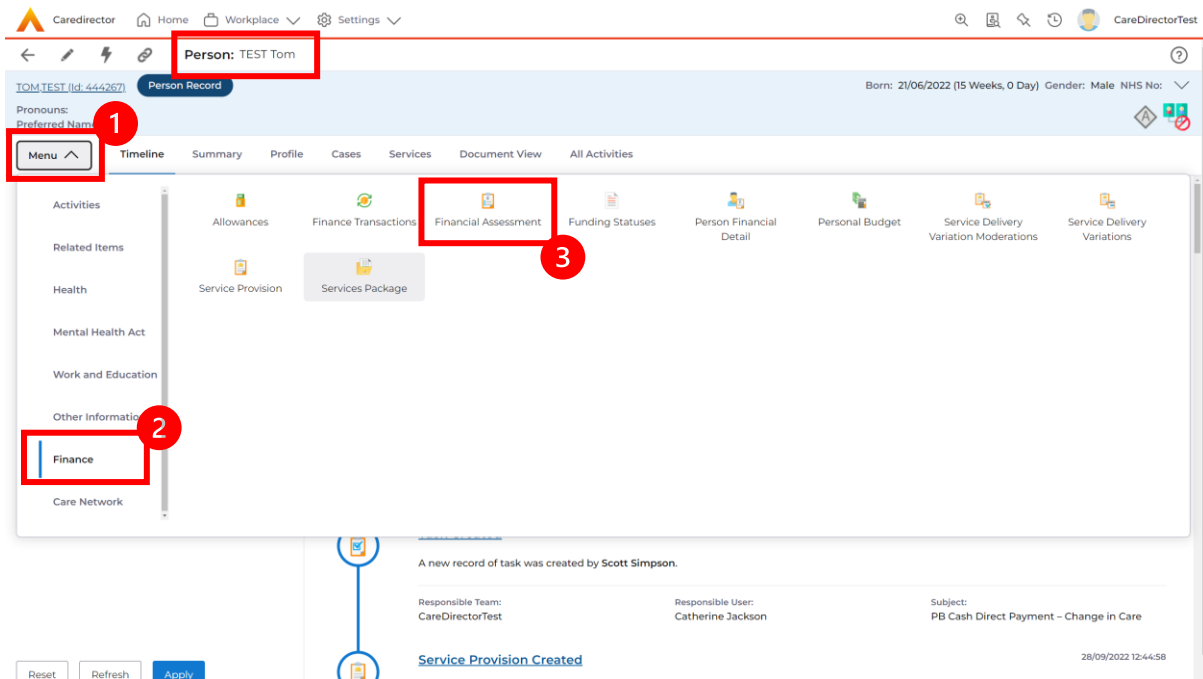
2. This will open the **Suspension** creation screen. Fill in the mandatory fields and select **Save** from the toolbar when done.



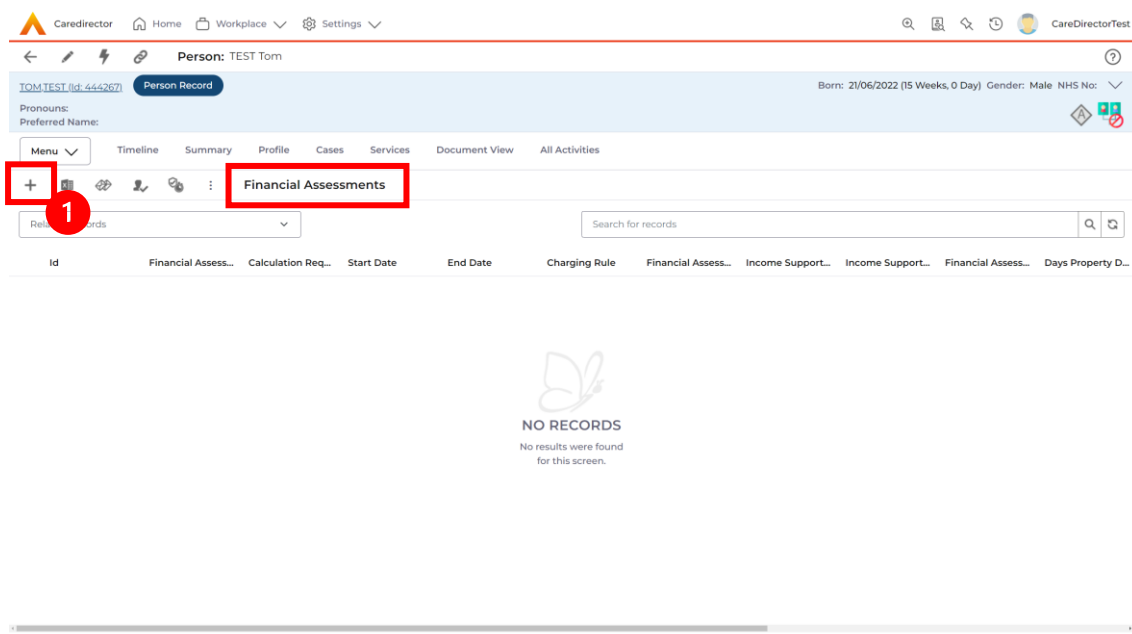
How to input Financial Assessments

Where to find Financial Assessments

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



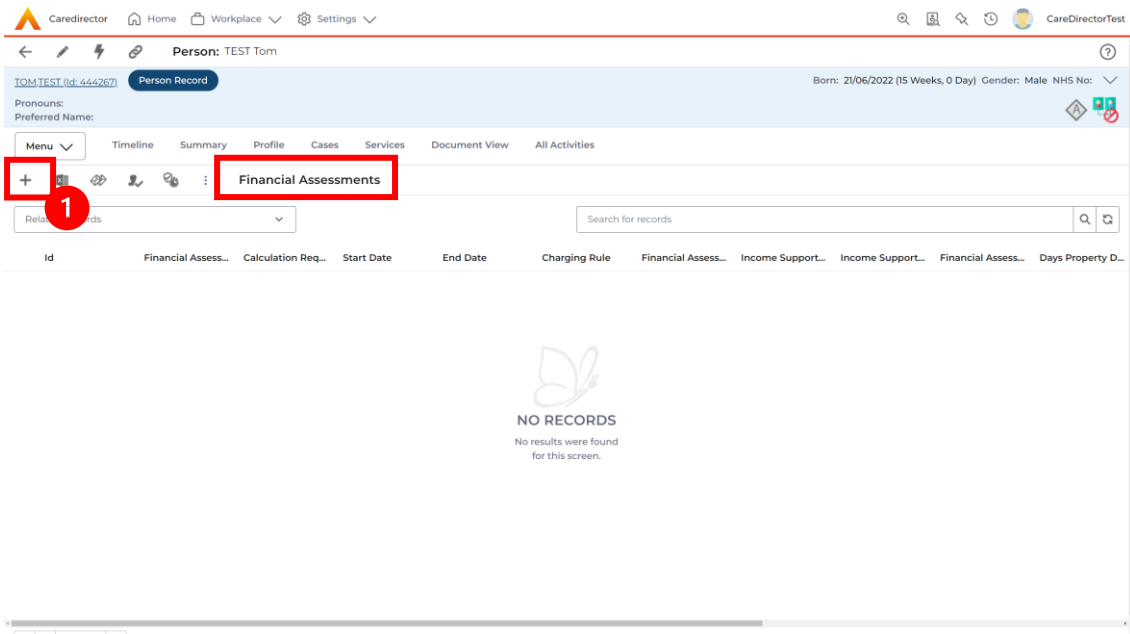
2. Once there, to view an existing **FA** select it, however select the **Create New Record** function from the toolbar.



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**.

Caredirector Home Workplace Settings

Financial Assessment: Tom Test \ Self Directed Support (Managed) \ 20/10/2022

TEST Tom (Id: 446228) **Person Record** Born: 03/05/1995 (27 Years) Gender: Male NHS No:
 Pronouns: Preferred Name:

Menu Timeline **Details** Charges Person Financial Details Contributions Service Provisions Transactions

General

Person* Responsible User*

Id Responsible Team*

Financial Assessment Status*

Calculation Required?*

Yes No

Dates

Start Date* End Date

Type

Charging Rule* Financial Assessment Type*

Financial Assessment Category* Days Property Disregarded

Income Support Type* Income Support Value

Activity

Commencement Date Person Notified Date

Permit Charge Updates via Financial Assessment?*

Yes No

Permit Charge Updates via Recalculation?*

Yes No

Authorisation Detail

Authorised By Authorisation Date

Related Information

Service Package

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.

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. The main content area shows a notification for 'Financial Assessment Created' on OCT 2022, with details: End Date, Financial Assessment Status: Draft, Start Date: 20/10/2022.

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

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. A red circle with the number '1' highlights the '+' icon in the 'Person Financial Details' sub-header, indicating the 'Create New Record' button. The main content area shows a table with columns: Id, Financial Detail ..., Financial Detail, Start Date, End Date, Inactive, Amount, Frequency of R. The table is currently empty, displaying 'NO RECORDS'.

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.

The screenshot shows the 'Person Financial Detail' form in the CareDirector system. The form is for a new entry for a user named Rachel TEST. The 'General' section contains the following fields:

- Id***: A text input field.
- Responsible Team***: A dropdown menu with 'CareDirector' selected.
- Person***: A text input field with 'Rachel TEST' entered.
- Financial Detail Type***: A dropdown menu with 'Allowable Expense' selected.
- Start Date***: A date picker field.
- End Date**: A date picker field.
- Amount***: A text input field with a currency symbol (€).
- Joint Amount**: A text input field with a currency symbol (€).
- Source Creation**: A dropdown menu with 'System' selected.

The 'Information' section contains the following options:

- Reference**: A text input field.
- Show Reference in Schedule**: Radio buttons for 'Yes' and 'No' (selected).
- Inactive**: Radio buttons for 'Yes' and 'No' (selected).

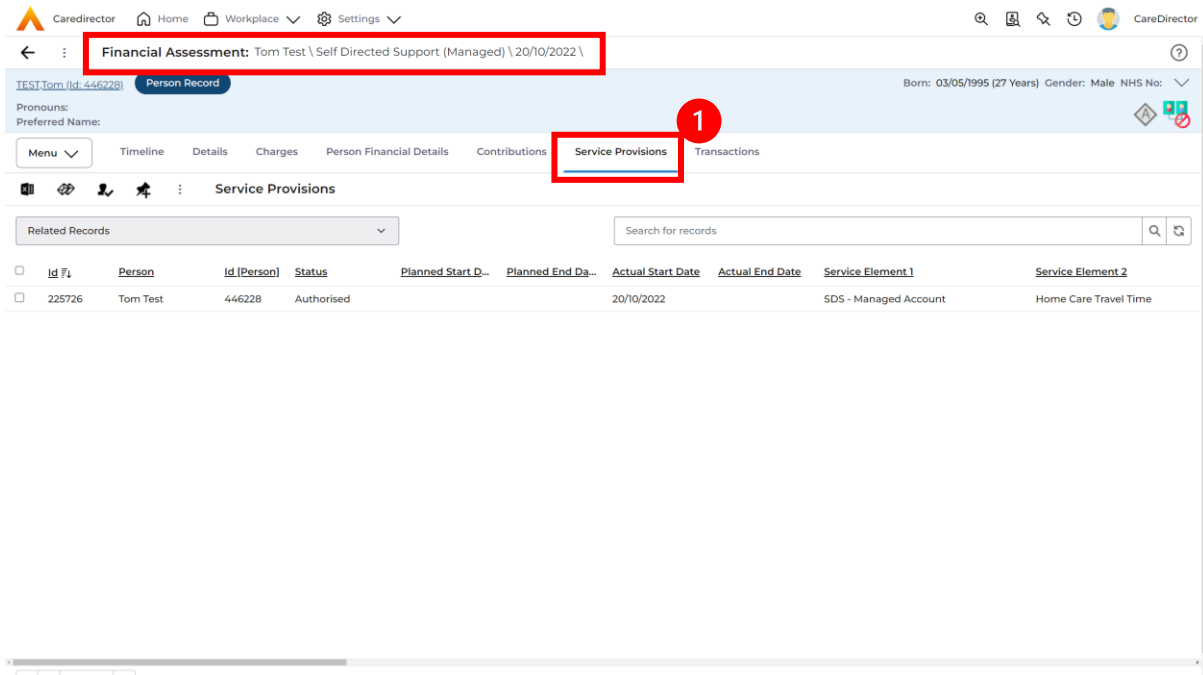
10. When saved and completed as many times as required, it will look like this.

The screenshot shows the 'Person Financial Details' page in CareDirector. The page header includes navigation links (Home, Workplace, Settings) and user information (Born: 03/05/1995 (27 Years), Gender: Male, NHS No: ...). The main content area is a table of financial records.

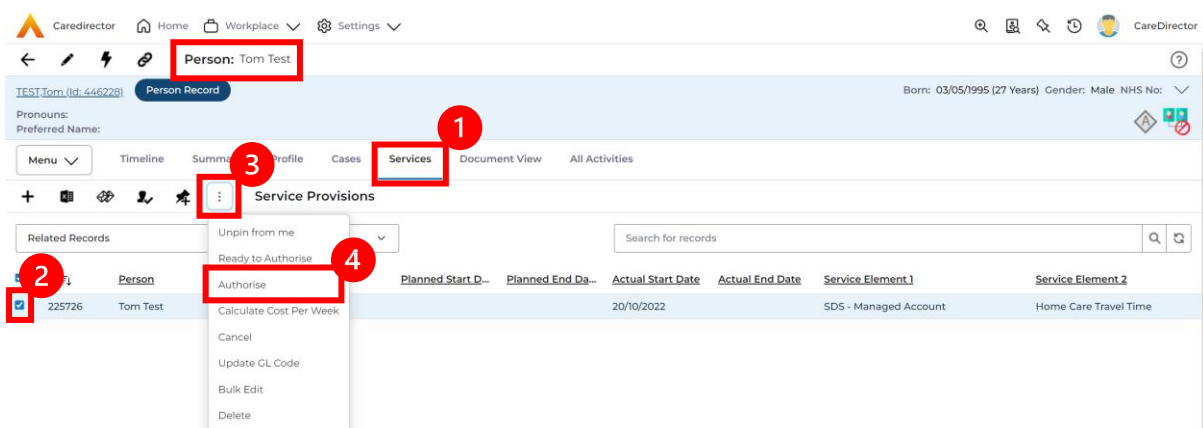
<input type="checkbox"/>	<u>Id</u>	<u>Financial Detail...</u>	<u>Financial Detail</u>	<u>Start Date</u> ↓	<u>End Date</u>	<u>Inactive</u>	<u>Amount</u>	<u>Frequency of Re...</u>	<u>Equity</u>	<u>% Ownership</u>	<u>Address</u>
<input type="checkbox"/>	243233	Benefit & Income	Attendance Allowance - High	20/10/2022		No		Per Week			
<input type="checkbox"/>	243234	Benefit & Income	Pension Guaranteed Credit - V...	20/10/2022	20/10/2022	No	£104.96	Per Week			
<input type="checkbox"/>	243235	Allowable Expen...	Insurance Premiums - Variable	20/10/2022		No	£1.90	Per Week			
<input type="checkbox"/>	243236	Asset	Current Account	20/10/2022		No	£16,032.61				
<input type="checkbox"/>	243237	Benefit & Income	Retirement Pension - Variable	20/10/2022		No	£143.74	Per Week			
<input type="checkbox"/>	243238	Benefit & Income	Pension Guaranteed Credit - V...	20/10/2022		No	£108.26	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**.

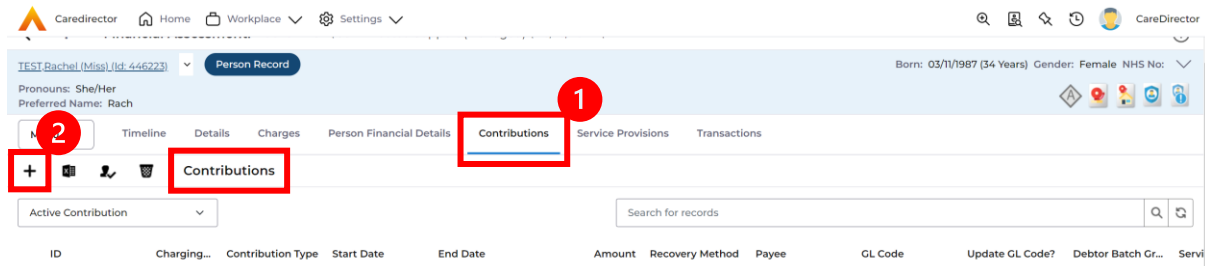


2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised**. You will need to refresh your page if so.
3. To **Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

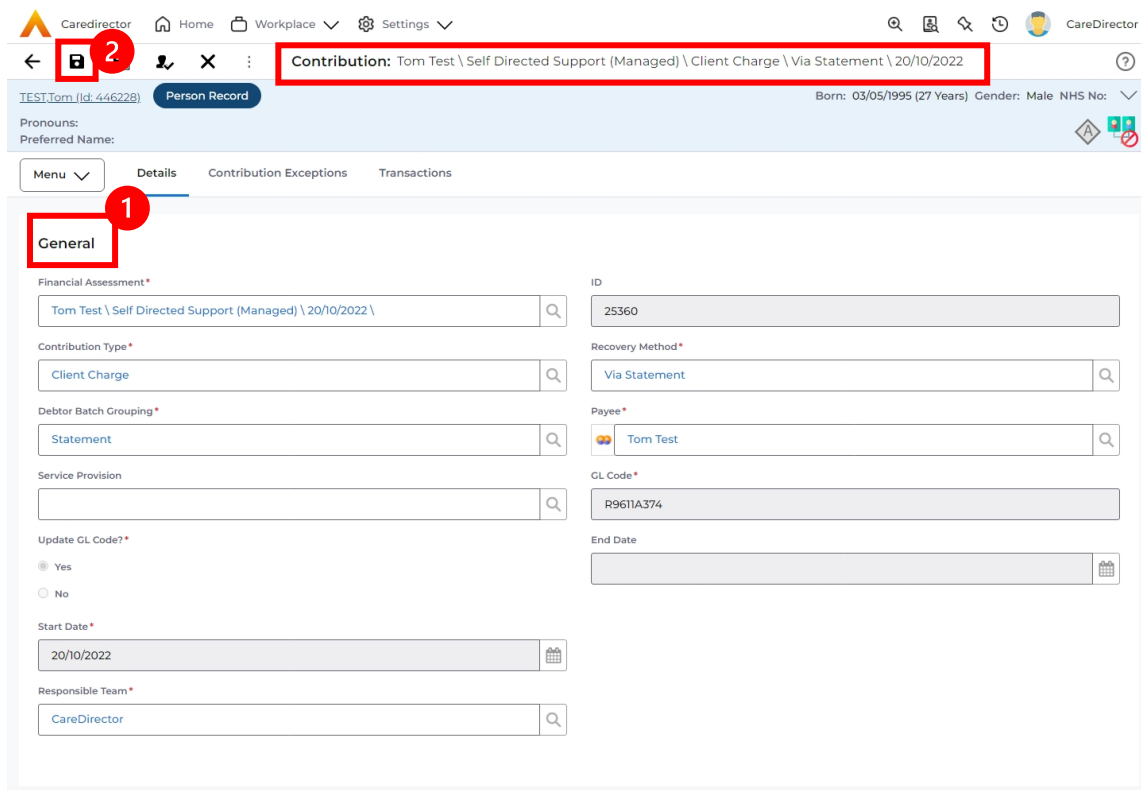


Contributions

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. 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**.

The screenshot shows the CareDirector interface for a 'Financial Assessment: Tom Test \ Self Directed Support (Managed) \ 20/10/2022 \'. The 'Charges' tab is highlighted with a red box and a red circle containing the number '1'. Below the navigation tabs, the 'Financial Assessment Charges' section is visible, containing a table of records.

	Status Reason	Start Date	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/>	Active	21/10/2022		Fairer Charging ...	No	£0.00	Yes	£0.00	No		No
<input type="checkbox"/>	Active	20/10/2022	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No		No

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

The screenshot shows the 'Financial Assessment Charge: Tom Test \ Self Directed Support (Managed) \ 20/10/2022 \ 20/10/2022' page. The 'Details' tab is selected, and the 'Charge Explanation' section is expanded to show the following information:

Selected algorithm: NonResidential Not-NoFinancialDetails Single
 Criteria: ScheduleType is NonResidential AND FinancialAssessmentType is NOT NoFinancialDetailsSupplied AND AssessmentCategory is Single
 Charge from 20/10/2022 00:00:00 to 20/10/2022 00:00:00
 Reason: Start Date of Financial Assessment, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details
 Schedule Type: NonResidential
 Assessment Type: FullAssessment
 Assessment Category: Single
 Joint Type: Unknown
 Days Property Disregarded: 0
 Person Age: 27
 No Partner

Assigning Setup data
 Validating Setup data
 Income Support Id: 102
 Schedule Setup Id: 9
 NonResidentialPolicy Id: 7
 ChargingRuleSetupIS Id: 99
 ChargingRuleSetupLA Id: 97

LoadMinimumIncomeGuarantee
 Minimum Income Guarantee: £276.85

AddCostOfServices
 CalculateCostOfServiceDetails - NonResidential
 Cost of service provision: 21.00
 Cost of service total: 21.00

AddBenefitsAndIncome
 CalculateBenefitAndIncomeDetails

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**.

The screenshot shows the CareDirector interface for a 'Financial Assessment' record. The breadcrumb trail is 'Financial Assessment: Tom Test \ Self Directed Support (Managed) \ 20/10/2022'. The 'Person Record' tab is active, showing details for 'TEST, Tom (Id: 446228)'. The 'Details' tab is selected in the navigation menu. The 'Financial Assessment Status' field is highlighted with a red box and a '2' in a red circle, showing a dropdown menu with 'Ready for Authorisation' selected. Other fields include 'Person' (Tom Test), 'Responsible User' (Scott Simpson), 'Id' (42873), 'Responsible Team' (CareDirector), 'Calculation Required?' (No), 'Start Date' (20/10/2022), and 'End Date'.

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

How to view and print Charge Schedule

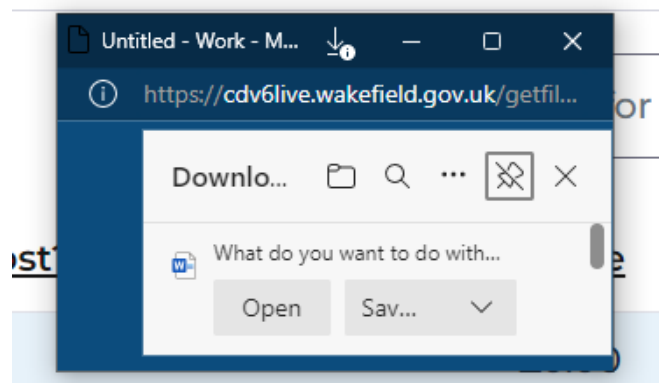
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.

Status Reason	Start Date F1	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/>	Active	21/10/2022	Fairer Charging ...	No	£0.00	Yes	£0.00	No	No	No
<input type="checkbox"/>	Active	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No	No	No

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

Status Reason	Start Date F1	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input checked="" type="checkbox"/>	Active	21/10/2022	Fairer Charging ...	No	£0.00	Yes	£0.00	No	No	No
<input type="checkbox"/>	Active	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No	No	No

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**.

The screenshot shows the CareDirector interface for a person record. The 'Financial Assessments' tab is active and highlighted with a red box. A red circle with the number '1' highlights the '+' icon in the menu bar, indicating where to click to create a new record.

Id	Financial Assess...	Calculation Req...	Start Date	End Date	Charging Rule	Financial Asses...	Income Support...	Income Support...	Financial Asses...	Days Property D...
42873	Authorised	No	20/10/2022	21/10/2022	Self Directed Su...	Full Assessment	NRS - Appropria...		Single	

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**.

Caredirector Home Workplace Settings

Financial Assessment: New

TEST Tom (Id: 446228) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:
 Pronouns: Preferred Name:

Details

General

Person * Tom Test Responsible User * Scott Simpson
 Id Responsible Team * CareDirector
 Financial Assessment Status * Draft
 Calculation Required? *
 Yes
 No

Dates

Start Date * 21/10/2022 End Date

Type

Charging Rule * ISF Financial Assessment Type * Full Assessment
 Financial Assessment Category * Single Days Property Disregarded
 Income Support Type * NRS - Appropriate Minimum Guarantee (Carer (I)) Income Support Value 276.85

Activity

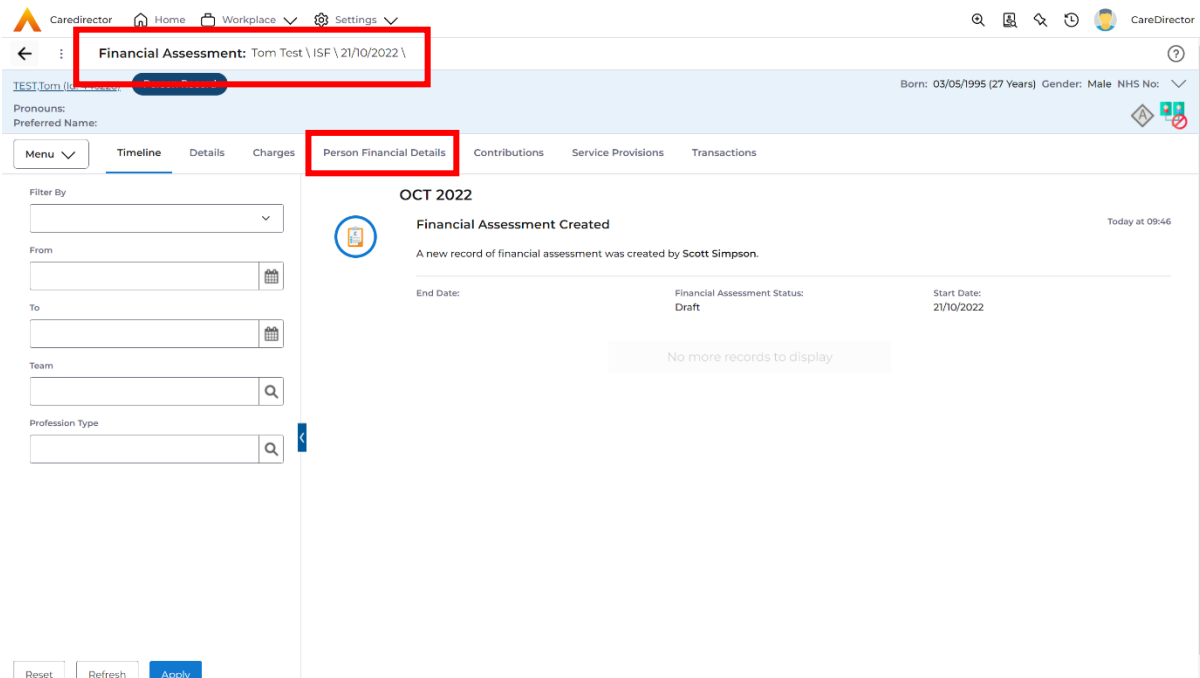
Commencement Date 21/10/2022 Person Notified Date
 Permit Charge Updates via Financial Assessment? *
 Yes
 No
 Permit Charge Updates via Recalculation? *
 Yes
 No

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

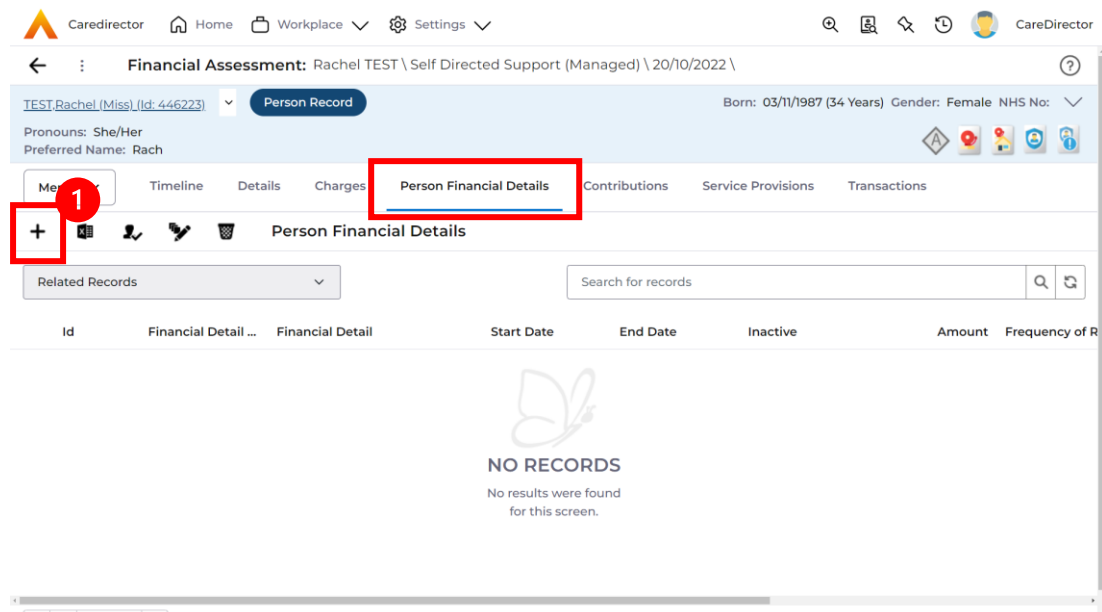
4. Now the **Financial Assessment for Self-Directed Support (Managed Account)** requires more personal information.

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.

Financial Assessment: Tom Test \ ISF \ 21/10/2022 \

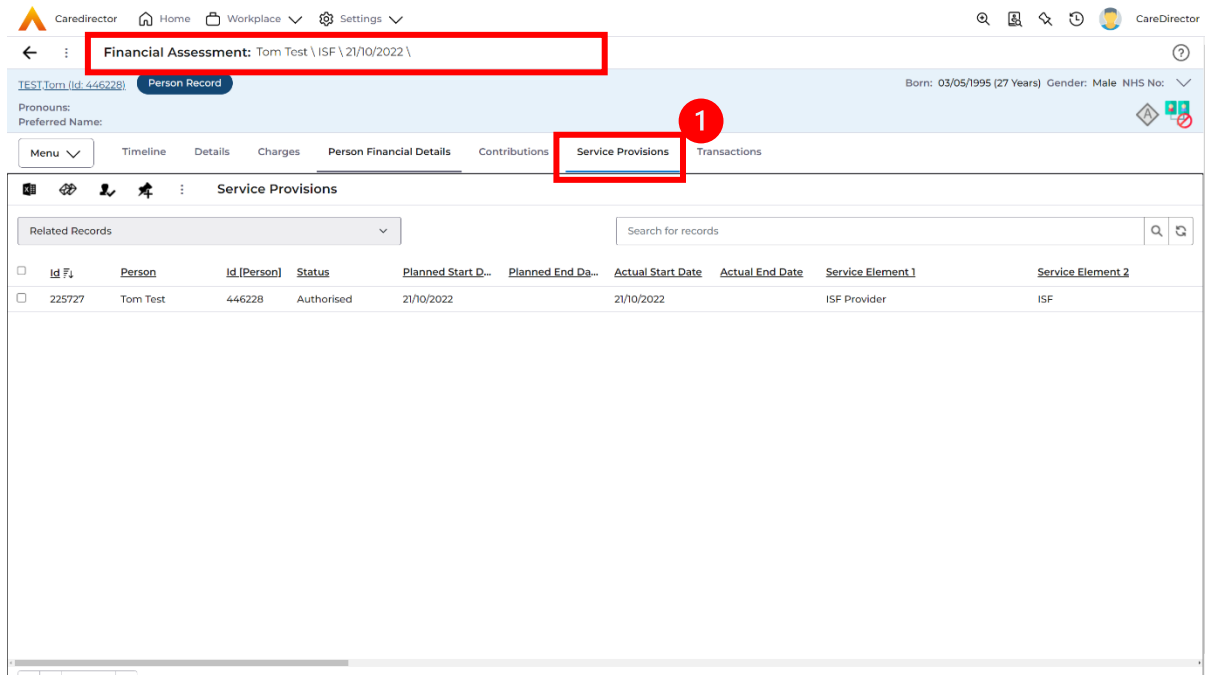
TEST, Tom (Id: 446228) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No: [redacted]

Person Financial Details

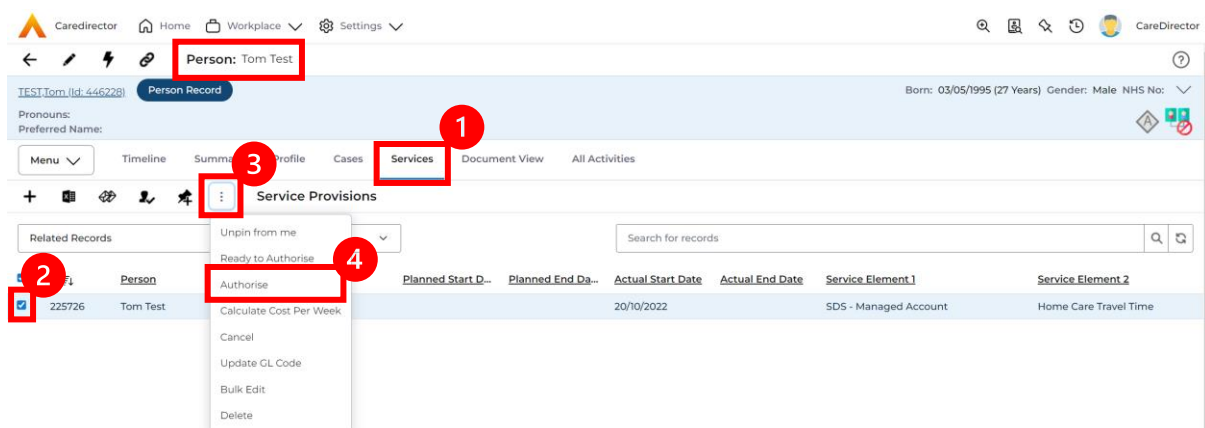
<input type="checkbox"/>	<u>Id</u>	<u>Financial Detail...</u>	<u>Financial Detail</u>	<u>Start Date</u> ↓↑	<u>End Date</u>	<u>Inactive</u>	<u>Amount</u>	<u>Frequency of Re...</u>	<u>Equity</u>	<u>% Ownership</u>	<u>Address</u>
<input type="checkbox"/>	243233	Benefit & Income	Attendance Allowance - High	20/10/2022		No		Per Week			
<input type="checkbox"/>	243235	Allowable Expen...	Insurance Premiums - Variable	20/10/2022	21/10/2022	No	£1.90	Per Week			
<input type="checkbox"/>	243236	Asset	Current Account	20/10/2022		No	£16,032.61				
<input type="checkbox"/>	243237	Benefit & Income	Retirement Pension - Variable	20/10/2022		No	£143.74	Per Week			
<input type="checkbox"/>	243238	Benefit & Income	Pension Guaranteed Credit - V...	20/10/2022		No	£108.26	Per Week			
<input type="checkbox"/>	243239	Benefit & Income	Notional Benefit Income - Vari...	21/10/2022		No	£52.50	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**.

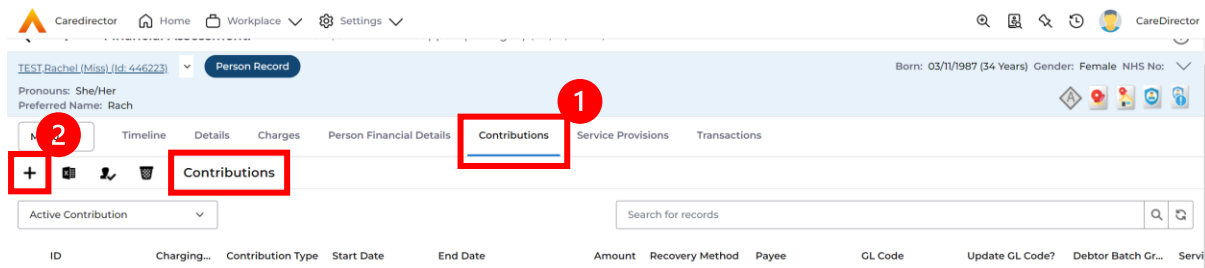


2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised**. You will need to refresh your page if so.
3. To **Authorise a Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** 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. When finished, select **Save**.

Contribution: New

General

Financial Assessment*
Tom Test \ ISF \ 21/10/2022 \

Contribution Type*
Client Charge

Debtor Batch Grouping*
Standard

Service Provision*
Tom Test \ Carers Trust - 205632 \ ISF Provider \ ISF \ \ Spot \ 225727 \ 21 Oct 2...

Update GL Code?*

Yes
 No

Start Date*
21/10/2022

Link Start Date to Service Provision?*

Yes
 No

Responsible Team*
CareDirector

ID

Recovery Method*
Net against Suppliers Payment

Payee*
Tom Test

GL Code
R9619A3749999WJ

End Date

Link End Date to Service Provision?*

Yes
 No

Calculate Charges

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

The screenshot shows the CareDirector interface. At the top, the breadcrumb trail is 'Financial Assessment: Tom Test \ ISF \ 21/10/2022 \'. Below this, the 'Person Record' header shows 'TESI Tom (Id: 446228)' and 'Born: 03/05/1995 (27 Years) Gender: Male NHS No:'. A red circle with the number '1' highlights the 'Charges' tab in the navigation menu. Below the menu, the 'Financial Assessment Charges' section contains a table of records.

<input type="checkbox"/>	Status Reason	Start Date	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/>	Active	22/10/2022		Fairer Charging ...	No	£19.00	Yes	£19.00	No		No
<input type="checkbox"/>	Active	21/10/2022	21/10/2022	Fairer Charging ...	No	£17.00	Yes	£17.00	No		No

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

The screenshot shows the 'Financial Assessment Charge: Tom Test \ ISF \ 22/10/2022' page. The 'Details' tab is selected, and the 'Charge Explanation' section is expanded, showing the following text:

```

Selected algorithm: NonResidential Not-NoFinancialDetails Single
Criteria: ScheduleType is NonResidential AND FinancialAssessmentType is NOT NoFinancialDetailsSupplied AND AssessmentCategory is Single
Charge from 22/10/2022 00:00:00 to
Reason: End Date of Person Financial Details

Schedule Type: NonResidential
Assessment Type: FullAssessment
Assessment Category: Single
Joint Type: Unknown
Days Property Disregarded: 0
Person Age: 27
No Partner

Assigning Setup data
Validating Setup data
Income Support Id: 102
Schedule Setup Id: 7
NonResidentialPolicy Id: 6
ChargingRuleSetupId: 15
ChargingRuleSetupLA Id: 14

LoadMinimumIncomeGuarantee
Minimum Income Guarantee: £276.85

AddCostOfServices
CalculateCostOfServiceDetails - NonResidential
GetCostOfServiceDetailsNonResidential - No Service Provisions attached
Cost of service total: 0

AddBenefitsAndIncome
CalculateBenefitAndIncomeDetails
Benefit and Income - Id: 26733 Name: Attendance Allowance - High DisregardId: DisregardType: Gross Value: 00 Disregarded Percent: 100 Disregarded Value: 00
    
```

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**.

The screenshot shows the CareDirector interface for a financial assessment. The 'Details' tab is selected, and the 'Financial Assessment Status' field is highlighted with a red box and a '2' callout. The status is currently 'Ready for Authorisation'. Other fields include Person (Tom Test), Responsible User (Scott Simpson), Id (42874), Responsible Team (CareDirector), Calculation Required? (Yes), Start Date (21/10/2022), and End Date.

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

How to view and print Charge Schedule

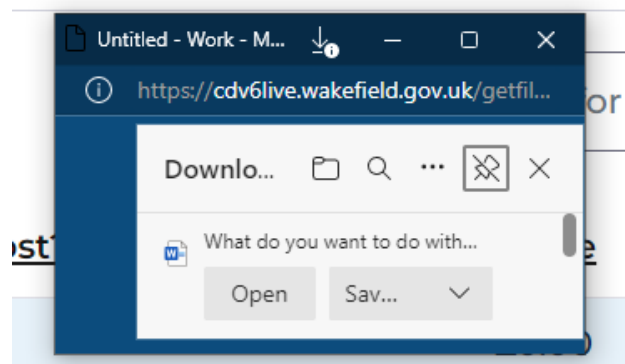
1. To view a **Charge Schedule** for name, ID's, amounts, cost of care. Select the **Financial Assessment** and go to **Charges** tab. **Checkbox** the **Charge** you wish to see the **Charging Schedule** for.

Status Reason	Start Date F1	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/> Active	22/10/2022		Fairer Charging ...	No	£19.00	Yes	£19.00	No		No
<input type="checkbox"/> Active	21/10/2022	21/10/2022	Fairer Charging ...	No	£17.00	Yes	£17.00	No		No

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

Status Reason	Start Date F1	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input checked="" type="checkbox"/> Active	22/10/2022		Fairer Charging ...	No	£19.00	Yes	£19.00	No		No
<input type="checkbox"/> Active	21/10/2022	21/10/2022	Fairer Charging ...	No	£17.00	Yes	£17.00	No		No

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**.

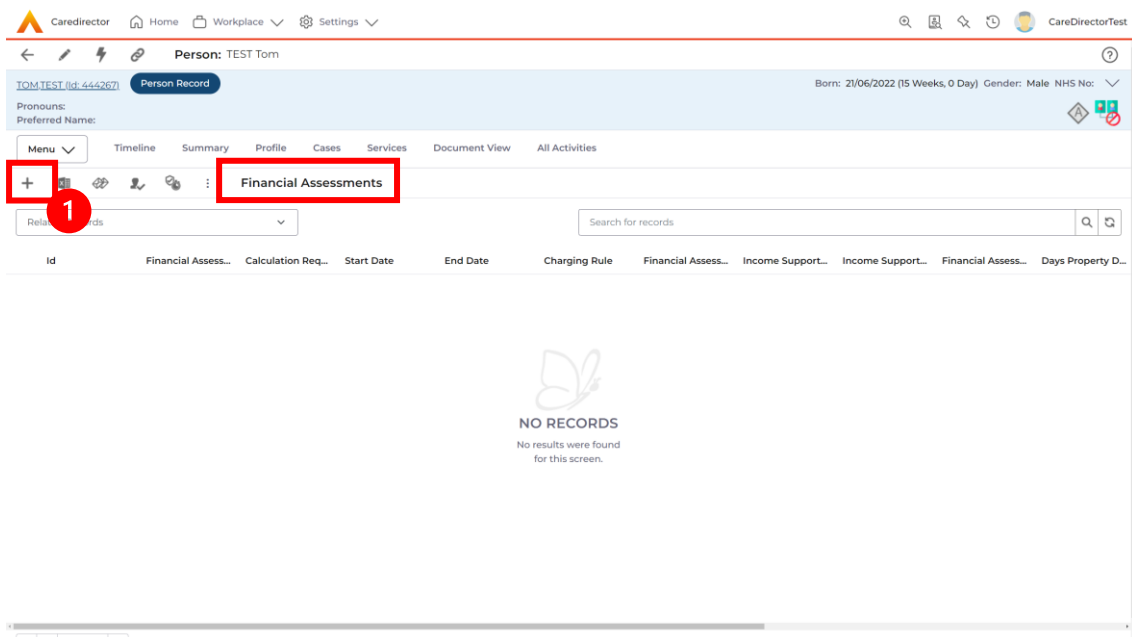


4. Once opened in **Microsoft Word** select **File, Print**.

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**.

Caredirector Home Workplace Settings

Financial Assessment: New

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

Pronouns: Preferred Name:

Details

General

Person *

Responsible User *

Id

Responsible Team *

Financial Assessment Status *

Calculation Required? * Yes No

Dates

Start Date *

End Date

Type

Charging Rule *

Financial Assessment Type *

Financial Assessment Category *

Days Property Disregarded

Income Support Type *

Income Support Value

Activity

Commencement Date

Person Notified Date

Permit Charge Updates via Financial Assessment? * Yes No

Permit Charge Updates via Recalculation? * Yes No

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.

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. The main content area shows a notification for 'Financial Assessment Created' on OCT 2022, with details: End Date, Financial Assessment Status: Draft, Start Date: 20/10/2022.

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

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. A red circle with the number '1' highlights the '+' icon in the 'Person Financial Details' sub-header, indicating the 'Create New Record' button. The main content area shows a table with columns: Id, Financial Detail ..., Financial Detail, Start Date, End Date, Inactive, Amount, Frequency of R. The table is currently empty, displaying 'NO RECORDS'.

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 PERSONALISATION & ASSESSMENT TEAM

Caredirector Home Workplace Settings

Financial Assessment: Test Tom \ Self Directed Support \ 21/10/2022 \

TCM Test (id: 666229) Person Record Born: 03/05/1996 (26 Years) Gender: Male NHS No: [redacted]

Pronouns: Preferred Name:

Menu Timeline Details Charges **Person Financial Details** Contributions Service Provisions Transactions

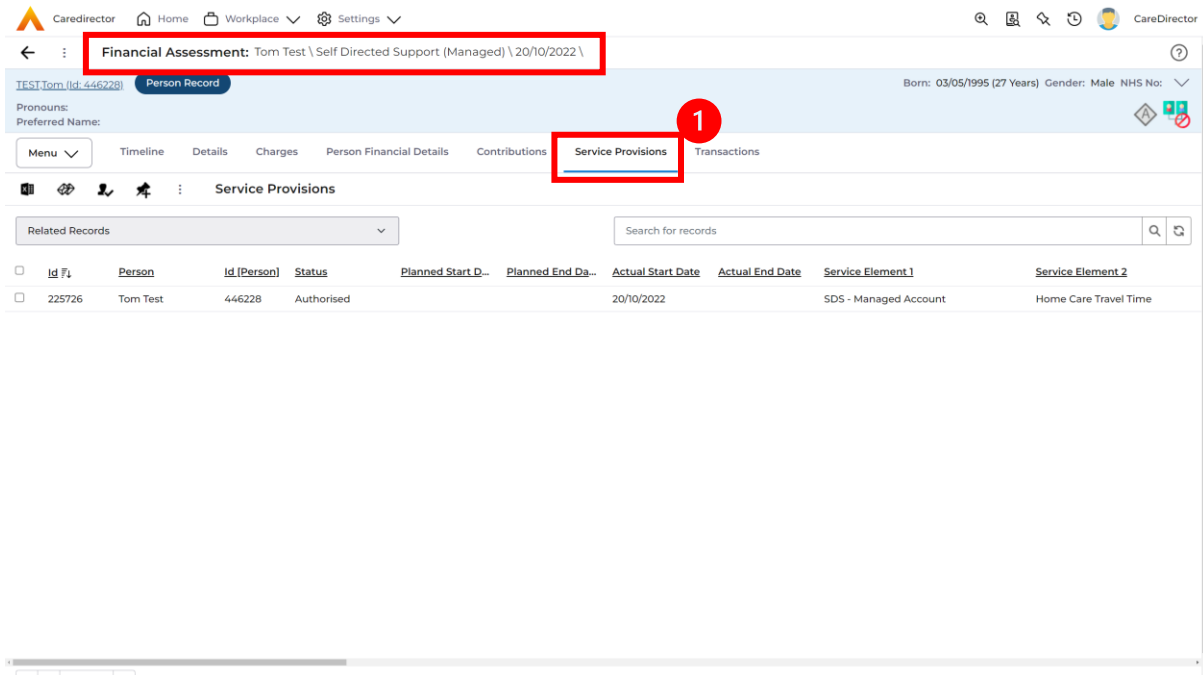
+ Person Financial Details

Related Records Search for records

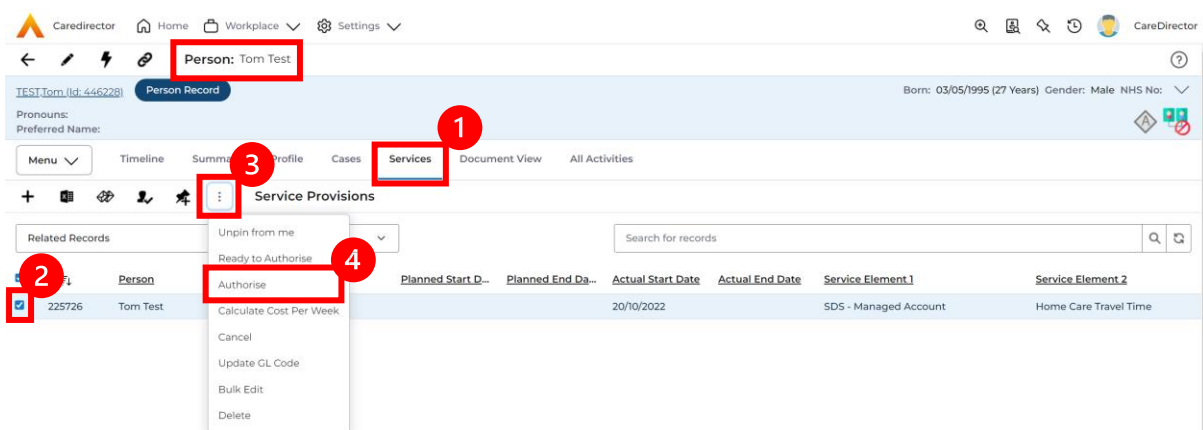
<input type="checkbox"/>	Id	Financial Detail...	Financial Detail	Start Date ↓↑	End Date	Inactive	Amount	Frequency of Re-	Equity	% Ownership	Address
<input type="checkbox"/>	243240	Benefit & Income	DLA (Mobility Component) - Hi...	21/10/2022		No	£64.50	Per Week			
<input type="checkbox"/>	243241	Benefit & Income	DLA (Care Component) - High	21/10/2022		No	£92.40	Per Week			
<input type="checkbox"/>	243242	Asset	Savings Account	21/10/2022		No	£5,423.16				
<input type="checkbox"/>	243243	Allowable Expen...	Rent - Variable	21/10/2022		No	£106.13	Per Week			
<input type="checkbox"/>	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**.

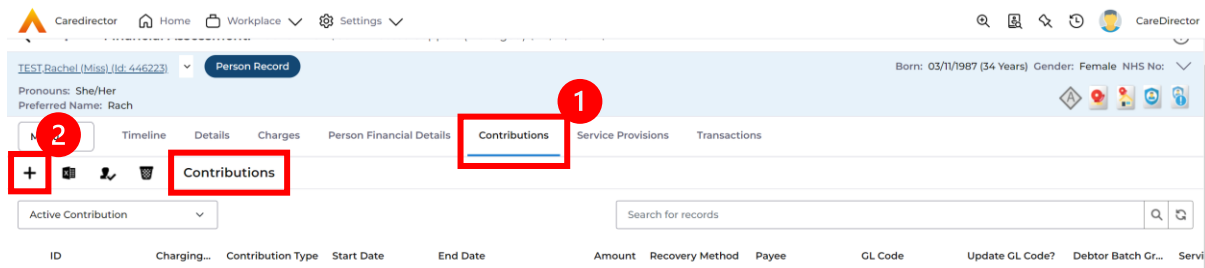


2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised**. You will need to refresh your page if so.
3. To Authorise a **Service Provision**, go to the **Person Record**, select **Services** tab. **Checkbox** next to the **Service Provision** and select the **Three Dots**. Then select **Authorise**.

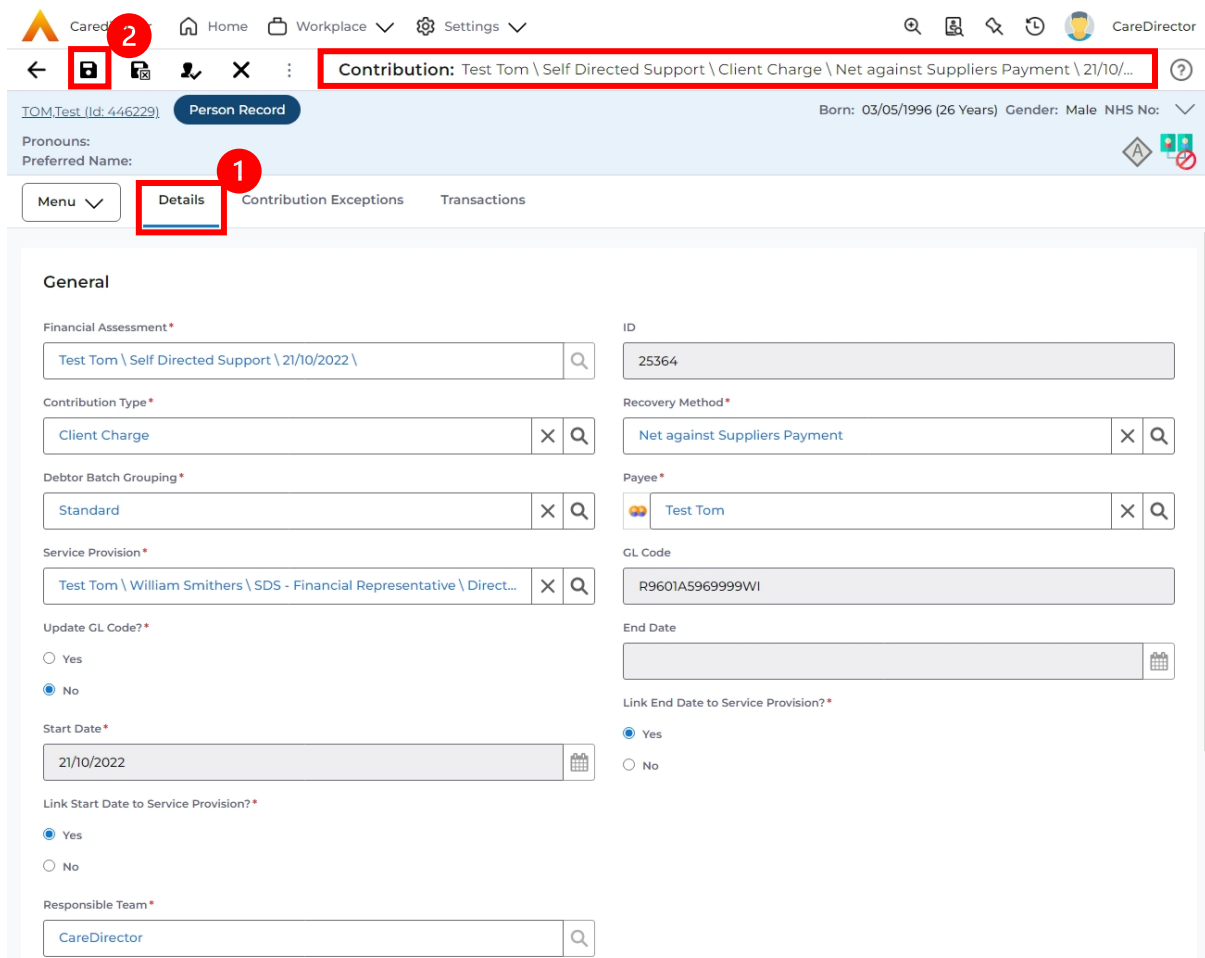


Contributions

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**.

The screenshot shows the CareDirector interface for a 'Financial Assessment: Test Tom \ Self Directed Support \ 21/10/2022 \'. The 'Charges' tab is highlighted with a red box and a red circle containing the number '1'. Below the navigation tabs, the 'Financial Assessment Charges' section is visible, containing a table of related active records.

<input type="checkbox"/>	Status Reason	Start Date	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximum...	Charge - To pay...
<input type="checkbox"/>	Active	29/10/2022		Fairer Charging ...	No	£39.00	Yes	£39.00
<input type="checkbox"/>	Active	21/10/2022	28/10/2022	Fairer Charging ...	No	£39.00	Yes	£39.00

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

The screenshot shows the 'Financial Assessment Charge: Test Tom \ 29/10/2022' page with the 'Details' tab selected. The 'Charge Explanation' section is expanded, displaying the following text:

```

Selected algorithm: NonResidential Not-NoFinancialDetails Single
Criteria: ScheduleType is NonResidential AND FinancialAssessmentType is NOT NoFinancialDetailsSupplied AND AssessmentCategory is Single
Charge from 29/10/2022 00:00:00 to
Reason: End Date of Service Provision, End Date of Service Provision Cost Per Week

Schedule Type: NonResidential
Assessment Type: FullAssessment
Assessment Category: Single
Joint Type: Unknown
Days Property Disregarded: 0
Person Age: 26
No Partner

Assigning Setup data
Validating Setup data
Income Support Id: 101
Schedule Setup Id: 21
NonResidentialPolicy Id: 18
ChargingRuleSetupId: 116
ChargingRuleSetupLA Id: 89

LoadMinimumIncomeGuarantee
Minimum Income Guarantee: £163.7

AddCostOfServices
CalculateCostOfServiceDetails - NonResidential
GetCostOfServiceDetailsNonResidential - No Authorised Service Provisions with overlapping dates found
Cost of service total: 0

AddBenefitsAndIncome
    
```

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**.

The screenshot shows the CareDirector interface for a financial assessment. The 'Details' tab is selected, and the 'Financial Assessment Status' field is highlighted with a red box and a '2' in a red circle. The status is currently 'Ready for Authorisation'. Other fields include Person (Tom Test), Responsible User (Scott Simpson), Id (42873), Responsible Team (CareDirector), Calculation Required? (No), Start Date (20/10/2022), and End Date.

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.

Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

Person Record

Charges

Status Reason	Start Date From	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximum	Charge - To pay	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/>	Active	21/10/2022	Fairer Charging ...	No	£0.00	Yes	£0.00	No	No	No
<input type="checkbox"/>	Active	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No	No	No

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

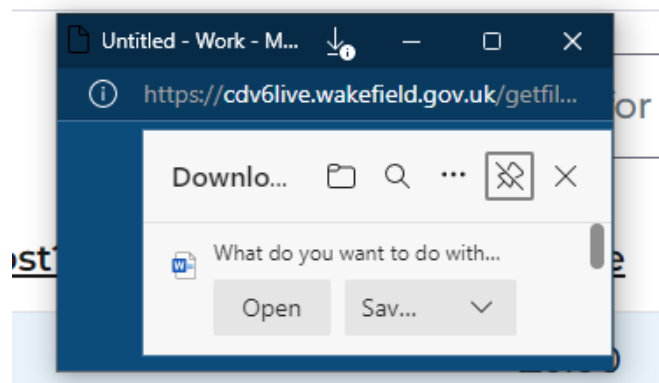
Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

Person Record

View Charge Schedule

Status Reason	Start Date From	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximum	Charge - To pay	Deferred?	Charge - Deferred	Manual Deferred
<input checked="" type="checkbox"/>	Active	21/10/2022	Fairer Charging ...	No	£0.00	Yes	£0.00	No	No	No
<input type="checkbox"/>	Active	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No	No	No

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**.

The screenshot shows the 'Person Record' page for 'Test Tom'. The 'Details' tab is active. The 'Financial Assessment Status' dropdown is set to 'Authorised'. The 'End Date' field is highlighted with a red box and a '2' in a red circle, showing the date 21/10/2022.

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

The screenshot shows the 'Person Record' page for 'Test Tom'. The 'Financial Assessments' tab is active. A table of related records is shown below, with a red box highlighting the 'Financial Assessments' tab and a '1' in a red circle next to the '+' icon.

Id	Financial Assess...	Calculation Req...	Start Date	End Date	Charging Rule	Financial Assess...	Income Support...	Income Support...	Financial Assess...	Days Property D...
42878	Authorised	No	21/10/2022	21/10/2022	Self Directed Su...	Full Assessment	NRS - IS (Disabili...		Single	

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**.

The screenshot shows the 'Financial Assessment: New' form in the CareDirector system. The form is for a person named 'TOM,Test (Id: 446229)'. The form is divided into sections: 'General', 'Dates', and 'Type'. The 'General' section includes fields for 'Person' (Test Tom), 'Responsible User' (Scott Simpson), 'Id', 'Responsible Team' (CareDirector), 'Financial Assessment Status' (Draft), and 'Calculation Required?' (No). The 'Dates' section includes 'Start Date' (21/10/2022) and 'End Date'. The 'Type' section includes 'Charging Rule' (Residential Permanent Stay), 'Financial Assessment Type' (Full Assessment), 'Income Support Type' (IS (Calculate to nil)), 'Days Property Disregarded', and 'Income Support Value' (0).

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.

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. The main content area shows a notification for 'Financial Assessment Created' on OCT 2022, with details: End Date, Financial Assessment Status: Draft, Start Date: 20/10/2022.

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

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. A red circle with the number '1' highlights the '+' icon in the 'Person Financial Details' sub-header, indicating the 'Create New Record' button. The main content area shows a table with columns: Id, Financial Detail ..., Financial Detail, Start Date, End Date, Inactive, Amount, Frequency of R. The table is currently empty, displaying 'NO RECORDS'.

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.

The screenshot shows the 'Person Financial Detail: New' form in the CareDirector system. The form is for a person named 'TOM Test (Id: 446222)'. The form fields are as follows:

- Id***: Empty
- Responsible Team***: CareDirector
- Person***: Test Tom
- Frequency of Receipt***: Per Week
- Financial Detail Type***: Benefit & Income
- Start Date***: 21/10/2022
- Financial Detail***: Occupational Pension (50% To Spouse) - Variable
- End Date**: Empty
- Amount***: £ 15
- Verification**: Empty
- Being Received?**: Yes (selected)
- Source Creation**: System

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**.

<input type="checkbox"/>	Id	Person	Id (Person)	Status	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1	Service Element 2
<input type="checkbox"/>	225730	Test Tom	446229	Authorised	21/10/2022		21/10/2022		Adult Residential Care	Long-Term Care

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**.

<input type="checkbox"/>	Person	Planned Start D...	Planned End Da...	Actual Start Date	Actual End Date	Service Element 1	Service Element 2
<input checked="" type="checkbox"/>	225726 Tom Test			20/10/2022		SDS - Managed Account	Home Care Travel Time

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**.

The screenshot shows the CareDirector interface for a person record. The 'Contributions' tab is highlighted with a red box and a red circle containing the number '1'. A red box with a red circle containing the number '2' highlights the '+ Create New Record' button in the top left corner of the Contributions section. Below the tabs, there is a search bar for records and a table header with columns: ID, Charging..., Contribution Type, Start Date, End Date, Amount, Recovery Method, Payee, GL Code, Update GL Code?, Debtor Batch Gr..., and Servi.

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

The screenshot shows the 'Contribution: New' form in CareDirector. The 'Details' tab is highlighted with a red box and a red circle containing the number '1'. A red box with a red circle containing the number '2' highlights the 'Save' button in the top left corner. The form contains the following fields:

- Financial Assessment***: Test Tom \ Residential Permanent Stay \ 21/10/2022 \
- Contribution Type***: Client Charge
- Debtor Batch Grouping***: Statement
- Service Provision**: Test Tom \ THE LAURELS RESIDENTIAL HOME * \ Adult Residential C...
- Update GL Code?***: No
- Start Date***: 21/10/2022
- Link Start Date to Service Provision?***: Yes
- Responsible Team***: CareDirector
- ID**: (empty)
- Recovery Method***: Via Statement
- Payee***: Test Tom
- GL Code**: R9I57C863IH01WD
- End Date**: (empty)
- Link End Date to Service Provision?***: Yes

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**.

Status Reason	Start Date	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
Active	21/10/2022		CRAG	No	£200.59	No	£200.59	No		No

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

Charge Explanation

Selected algorithm: Residential Not-NoFinancialDetails Single
 Criteria: ScheduleType is Residential AND AssessmentType is NOT NoFinancialDetails AND Category is Single
 Charge from 21/10/2022 00:00:00 to
 Reason: Start Date of Financial Assessment, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details

Schedule Type: Residential
 Assessment Type: FullAssessment
 Assessment Category: Single
 Joint Type: Unknown
 Days Property Disregarded: 0
 Person Age: 26
 No Partner

Assigning Setup data
 Validating Setup data
 Income Support Id: 110
 Schedule Setup Id: 11
 NonResidentialPolicy Id:
 ChargingRuleSetupId: 26
 ChargingRuleSetupLA Id: 205
 LoadMinimumIncomeGuarantee
 Minimum Income Guarantee: £0

AddCostOfServices
 CalculateCostOfServiceDetails - Residential
 GetCostOfServiceDetailsResidential - No Authorised Service Provisions with overlapping dates found
 Cost of service total: 0

AddBenefitsAndIncome
 CalculateBenefitAndIncomeDetails
 Benefit and Income - Id: 267240, Name: DLA (Mobility Component) - High, DisregardId: 45, DisregardType: Full, Gross Value: £64.50, Disregard Percent: 0, Disregard Value: 0

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**.

The screenshot shows the CareDirector interface for a financial assessment. At the top, there are navigation tabs: 'Menu', 'Timeline', 'Details', 'Charges', 'Person Financial Details', 'Contributions', 'Service Provisions', and 'Transactions'. The 'Details' tab is selected and highlighted with a red box and a '1' in a red circle. Below the tabs, the 'General' section contains several fields: 'Person*' (Tom Test), 'Responsible User*' (Scott Simpson), 'Id' (42873), 'Responsible Team*' (CareDirector), 'Financial Assessment Status*' (Ready for Authorisation), 'Calculation Required?*' (No), 'Start Date*' (20/10/2022), and 'End Date*'. The 'Financial Assessment Status*' field is highlighted with a red box and a '2' in a red circle, indicating the field to be changed. The 'Ready for Authorisation' status is also highlighted with a red box and a '3' in a red circle.

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.

Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

Person Record

Menu Timeline Details **Charges** Person Financial Details Contributions Service Provisions Transactions

Financial Assessment Charges

Status Reason	Start Date F	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/> Active	21/10/2022		Fairer Charging ...	No	£0.00	Yes	£0.00	No		No
<input type="checkbox"/> Active	20/10/2022	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No		No

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

Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

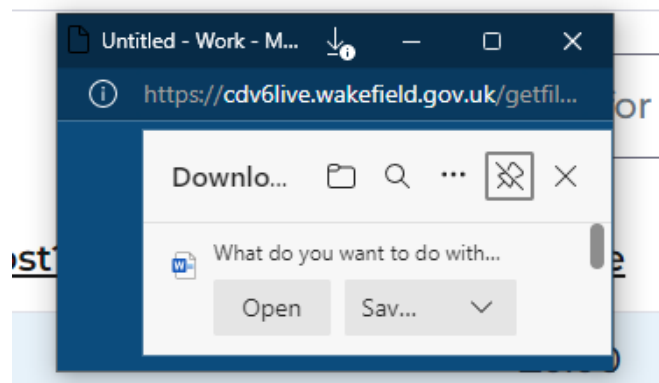
Person Record

Menu Timeline **Charges** Person Financial Details Contributions Service Provisions Transactions

Financial Assessment Charges

Status Reason	Start Date F	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input checked="" type="checkbox"/> Active	21/10/2022		Fairer Charging ...	No	£0.00	Yes	£0.00	No		No
<input type="checkbox"/> Active	20/10/2022	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No		No

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**.

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'Financial Assessments' menu item is highlighted with a red box. A red circle with the number '1' is placed over the plus sign icon in the top left of the menu bar, indicating the 'Create New Record' action.

Id	Financial Assess--	Calculation Req--	Start Date	End Date	Charging Rule	Financial Assess--	Income Support--	Income Support--	Financial Assess--	Days Property D--
42878	Authorised	No	21/10/2022	21/10/2022	Self Directed Su...	Full Assessment	NRS - IS (Disabili...		Single	

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**.

Caredirector Home Workplace Settings

Financial Assessment: New

MULLENTEST, Tom (Id: 446230) **Person Record** Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns: Preferred Name:

Details

General

Person *

Responsible User *

Id

Responsible Team *

Financial Assessment Status *

Calculation Required? *

Yes

No

Dates

Start Date *

End Date

Type

Charging Rule *

Financial Assessment Type *

Income Support Type *

Days Property Disregarded

Income Support Value

Activity

Commencement Date

Person Notified Date

Permit Charge Updates via Financial Assessment? *

Yes

No

Permit Charge Updates via Recalculation? *

Yes

No

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.

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. The main content area shows a notification for 'Financial Assessment Created' on OCT 2022, with details: End Date, Financial Assessment Status: Draft, Start Date: 20/10/2022.

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

The screenshot shows the CareDirector interface for a user named Rachel TEST. The breadcrumb path is highlighted in red: **Financial Assessment: Rachel TEST \ Self Directed Support (Managed) \ 20/10/2022 **. The 'Person Financial Details' tab is also highlighted in red. A red circle with the number '1' highlights the '+' icon in the 'Person Financial Details' sub-header, indicating the 'Create New Record' button. The main content area shows a 'NO RECORDS' message: 'No results were found for this screen.'

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**

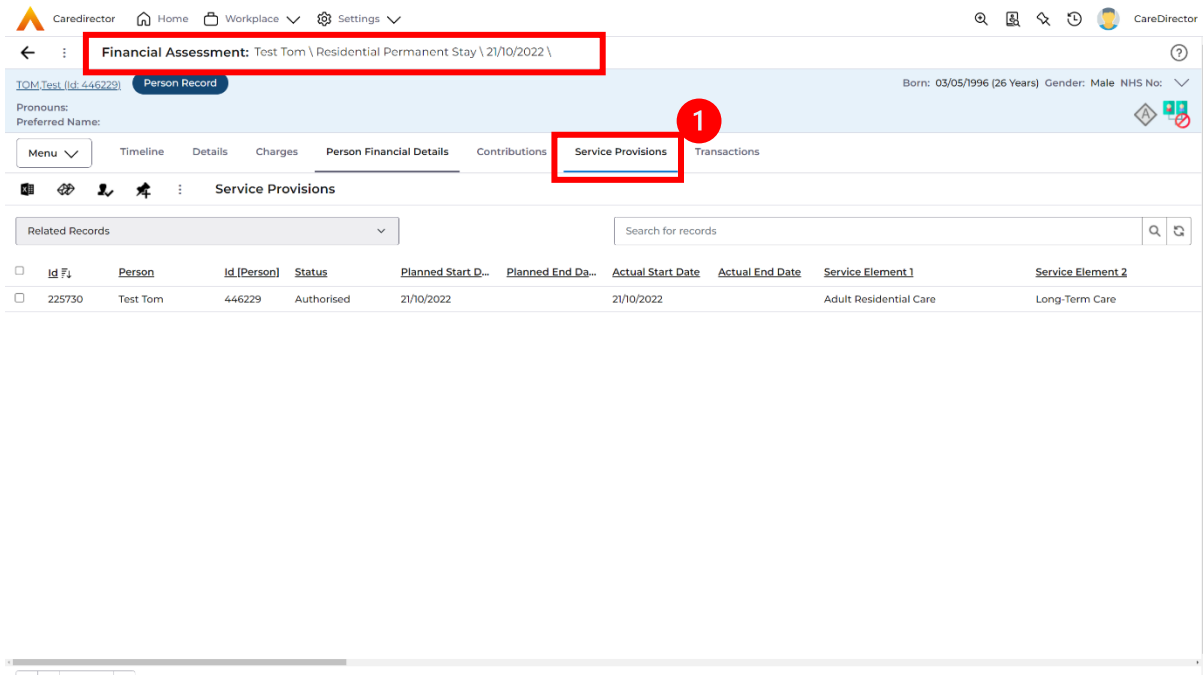
6. Each one has skip logic, meaning if one is selected further fields are shown for further information. Fill out as intended for each one.

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

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

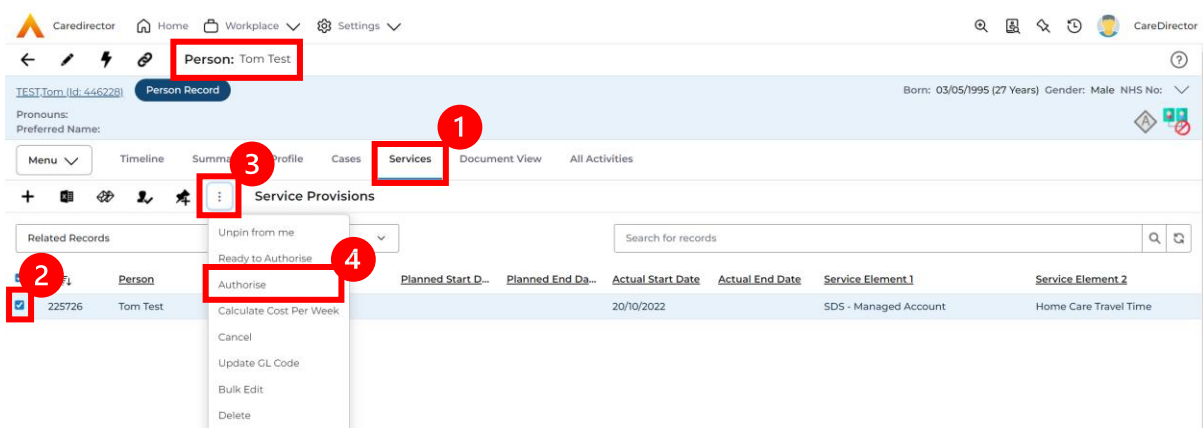
Ensure Service Provisions are linked (How to Authorise Service Provisions)

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



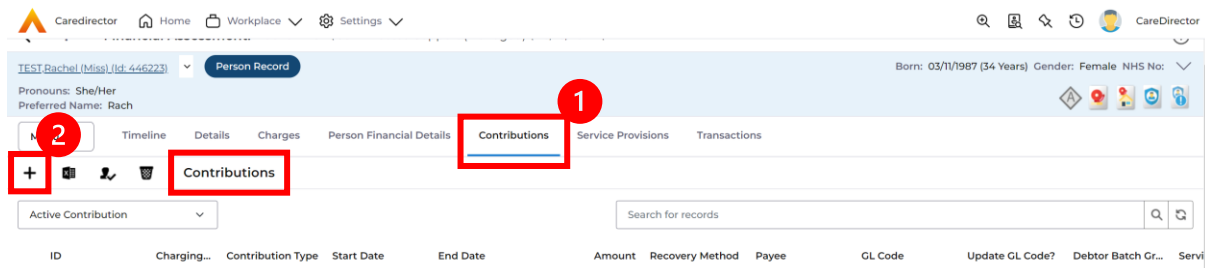
2. Please Note: If your **Service Provisions** is not linked, you will have to get the **Service Provision Authorised**. You will need to refresh your page if so.

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**.

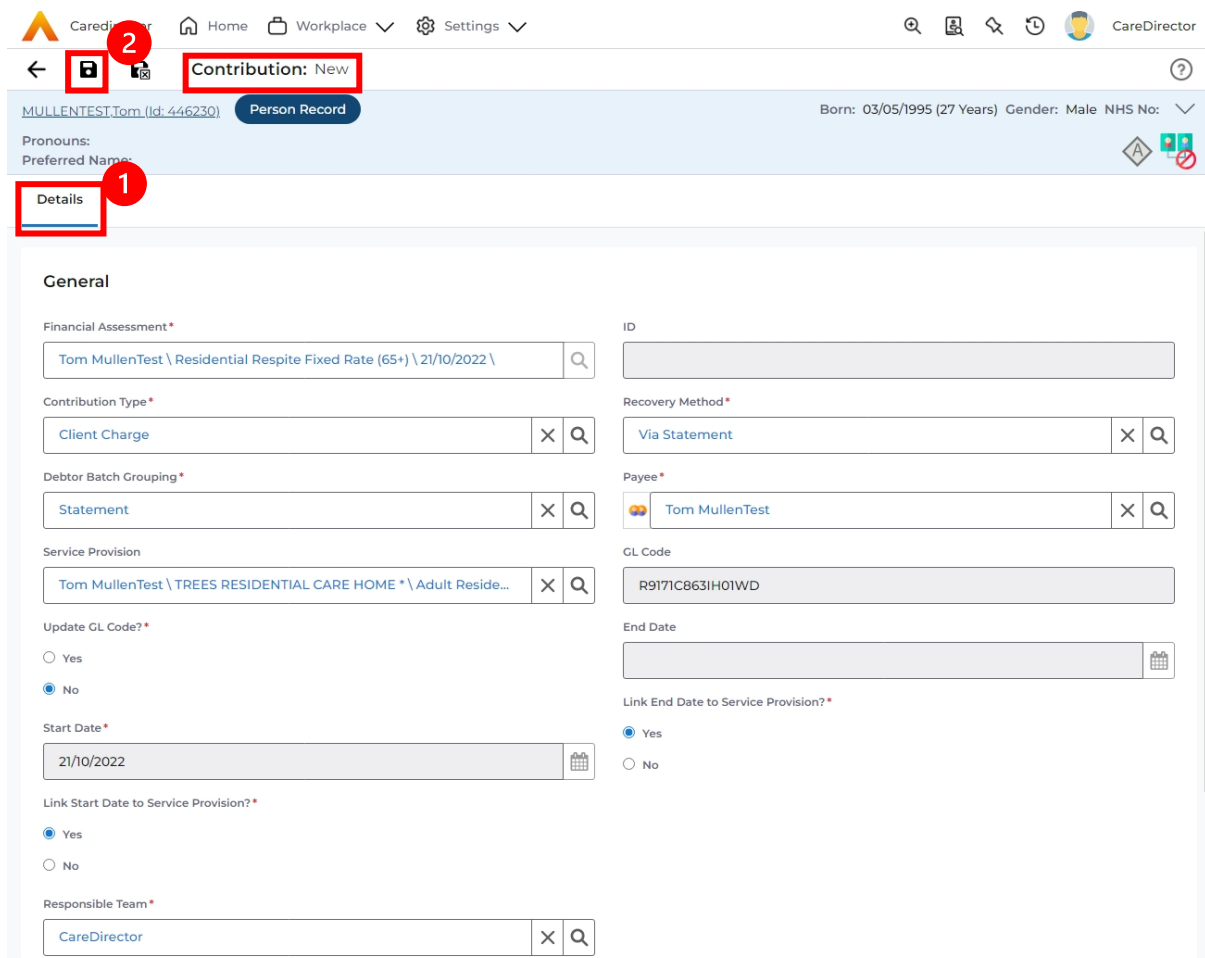


Contributions

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**.

Financial Assessment: Test Tom \ Residential Permanent Stay \ 21/10/2022 \

Person Record

Born: 03/05/1996 (26 Years) Gender: Male NHS No: [redacted]

Menu | Timeline | Details | **Charges** | Person Financial Details | Contributions | Service Provisions | Transactions

Financial Assessment Charges

Related Active Records | Search for records

<input type="checkbox"/>	Status Reason	Start Date	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/>	Active	21/10/2022		CRAG	No	£200.59	No	£200.59	No		No

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

Financial Assessment Charge: Test Tom \ Residential Permanent Stay \ 21/10/2022 \

Menu | Details | Charge Details | Charge Totals

Charge Explanation

Selected algorithm: Residential Not-NoFinancialDetails Single
 Criteria: ScheduleType is Residential AND AssessmentType is NOT NoFinancialDetails AND Category is Single
 Charge from 21/10/2022 00:00:00 to
 Reason: Start Date of Financial Assessment, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details, Start Date of Person Financial Details

Schedule Type: Residential
 Assessment Type: FullAssessment
 Assessment Category: Single
 Joint Type: Unknown
 Days Property Disregarded: 0
 Person Age: 26
 No Partner

Assigning Setup data
 Validating Setup data
 Income Support Id: 110
 Schedule Setup Id: 11
 NonResidentialPolicy Id:
 ChargingRuleSetupId: 26
 ChargingRuleSetupLA Id: 205
 LoadMinimumIncomeGuarantee
 Minimum Income Guarantee: £0

AddCostOfServices
 CalculateCostOfServiceDetails - Residential
 GetCostOfServiceDetailsResidential - No Authorised Service Provisions with overlapping dates found
 Cost of service total: 0

AddBenefitsAndIncome
 CalculateBenefitAndIncomeDetails
 Benefit and Income - Id: 267240 Name: DLA (Mobility Component) - High DisregardId: 45 DisregardType: Full Gross Value: £64.50 Disregard Percent: 0 Disregard Value: 0

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**.

The screenshot shows the CareDirector interface for a 'Financial Assessment' record. The breadcrumb trail is 'Financial Assessment: Tom Test \ Self Directed Support (Managed) \ 20/10/2022'. The 'Person Record' tab is active, showing details for 'Tom Test' (Id: 446228). The 'Details' tab is selected in the navigation menu. The 'Financial Assessment Status' field is highlighted with a red box and a '2' in a red circle, showing a dropdown menu with 'Ready for Authorisation' selected. Other fields include 'Person' (Tom Test), 'Responsible User' (Scott Simpson), 'Id' (42873), 'Responsible Team' (CareDirector), 'Calculation Required?' (No), 'Start Date' (20/10/2022), and 'End Date'.

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.

Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

Person Record

Menu Timeline Details **Charges** Person Financial Details Contributions Service Provisions Transactions

Financial Assessment Charges

Status Reason	Start Date F	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input type="checkbox"/> Active	21/10/2022		Fairer Charging ...	No	£0.00	Yes	£0.00	No		No
<input type="checkbox"/> Active	20/10/2022	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No		No

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

Financial Assessment: Torn Test \ Self Directed Support (Managed) \ 20/10/2022 \

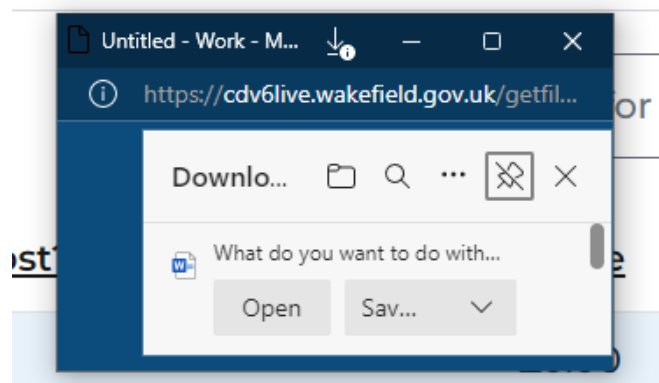
Person Record

Menu Timeline **Charges** Person Financial Details Contributions Service Provisions Transactions

Financial Assessment Charges

Status Reason	Start Date F	End Date	Schedule Type	Full Cost?	Final Charge	Limit To Maximu...	Charge - To pay...	Deferred?	Charge - Deferred	Manual Deferred
<input checked="" type="checkbox"/> Active	21/10/2022		Fairer Charging ...	No	£0.00	Yes	£0.00	No		No
<input type="checkbox"/> Active	20/10/2022	20/10/2022	Fairer Charging ...	No	£70.00	Yes	£70.00	No		No

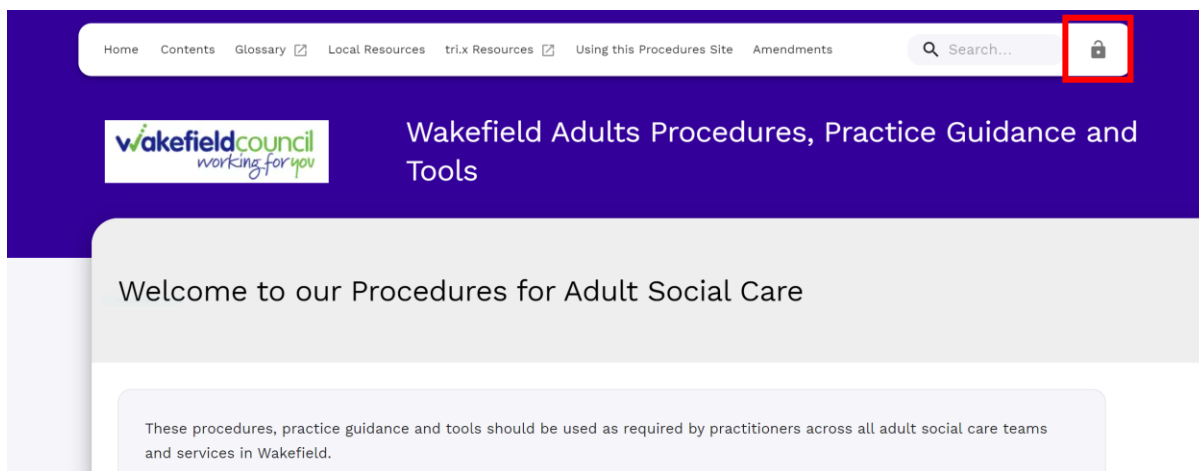
3. This will download it for you to open in **Microsoft Word**. Ensure your settings are set up correctly so you do not have to **Save it**.



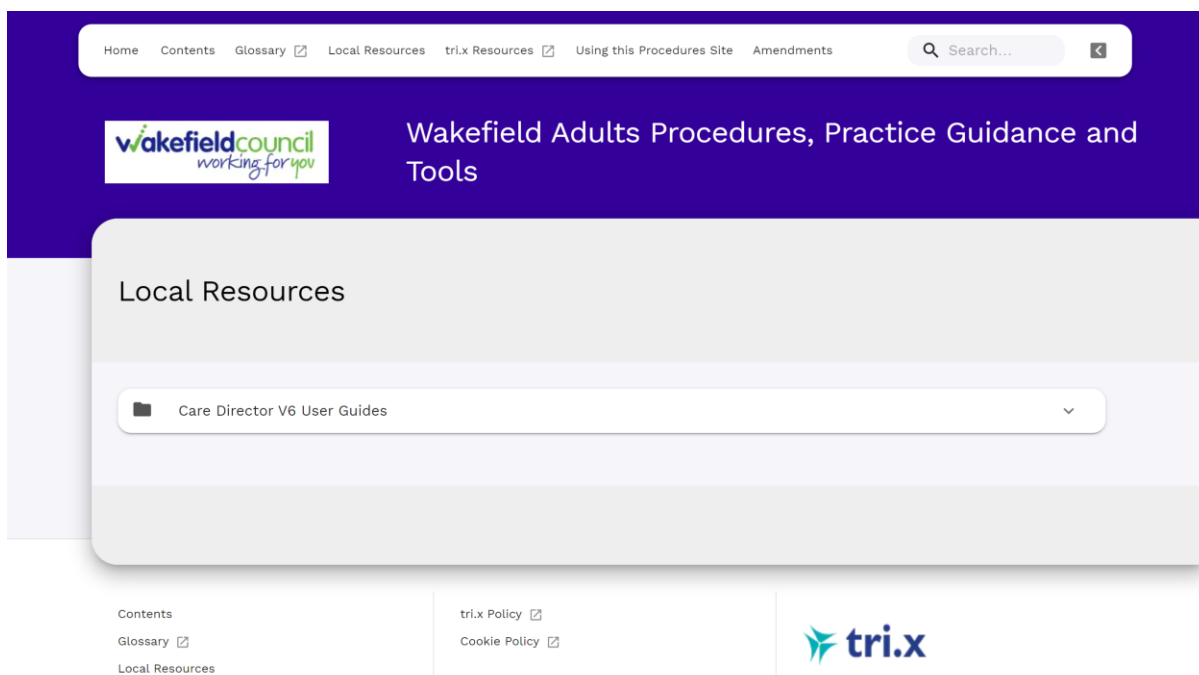
4. Once opened in **Microsoft Word** select **File, Print**.

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