



# Adults Connecting Care Team V1.0.1

**Document** CareDirector Adults Connecting Care Team.  
**Purpose** Adults Connecting Care Team daily tasks on CareDirector.  
**Version** V1.0.1  
**Owner** ICT Business Transformation Team  
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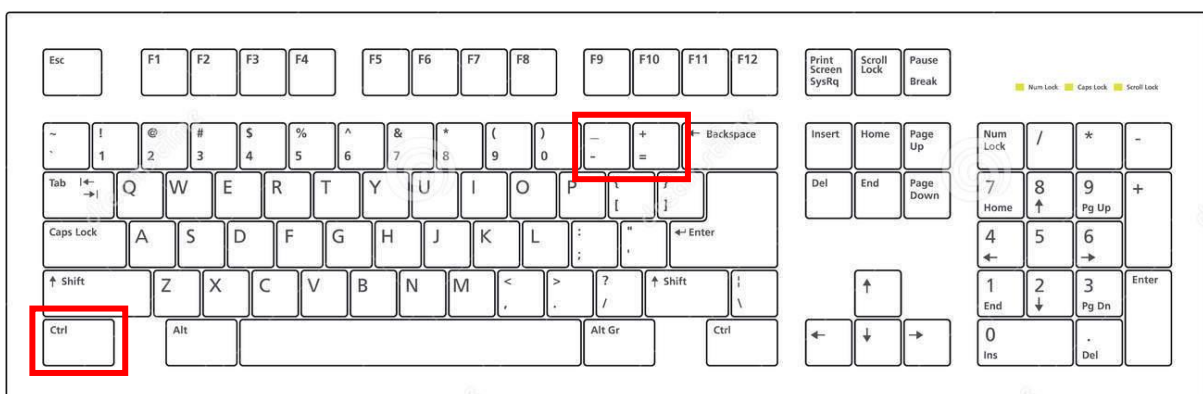
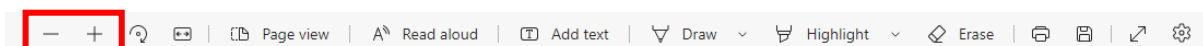
## Guide Information

### Before Live Access...

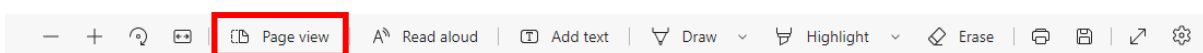
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### 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.

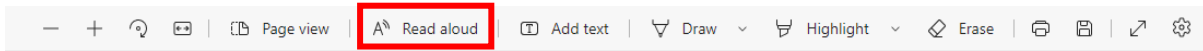


3. To put pages next to one another, select the **Page View** icon on the toolbar.

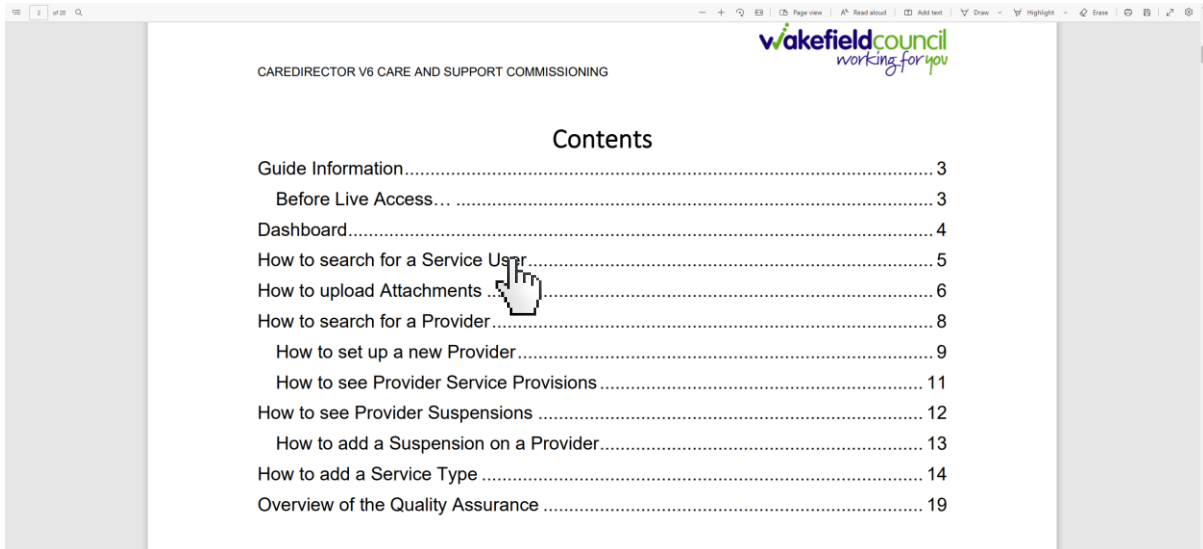




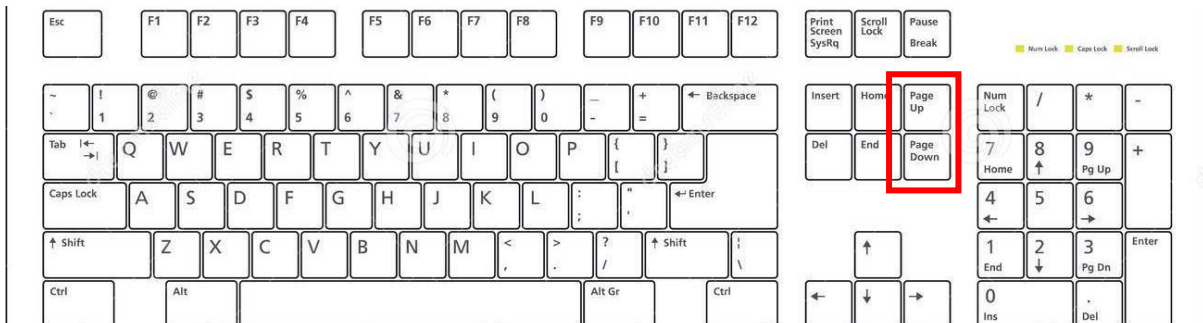
4. For auditory assistance, select **Read Aloud** from the toolbar.



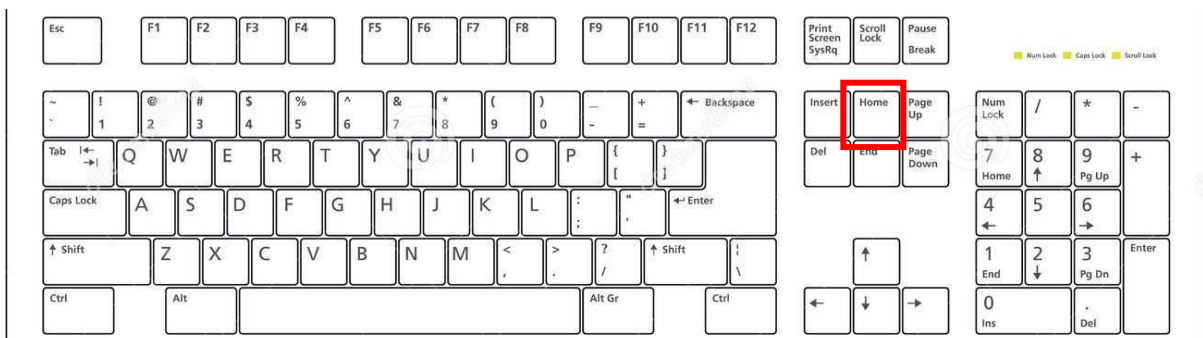
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

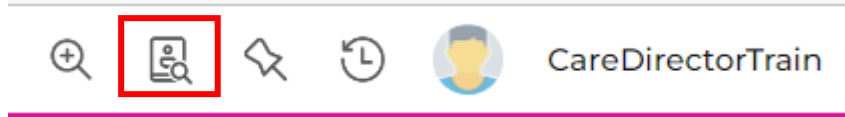


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## How to search for a Service User

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

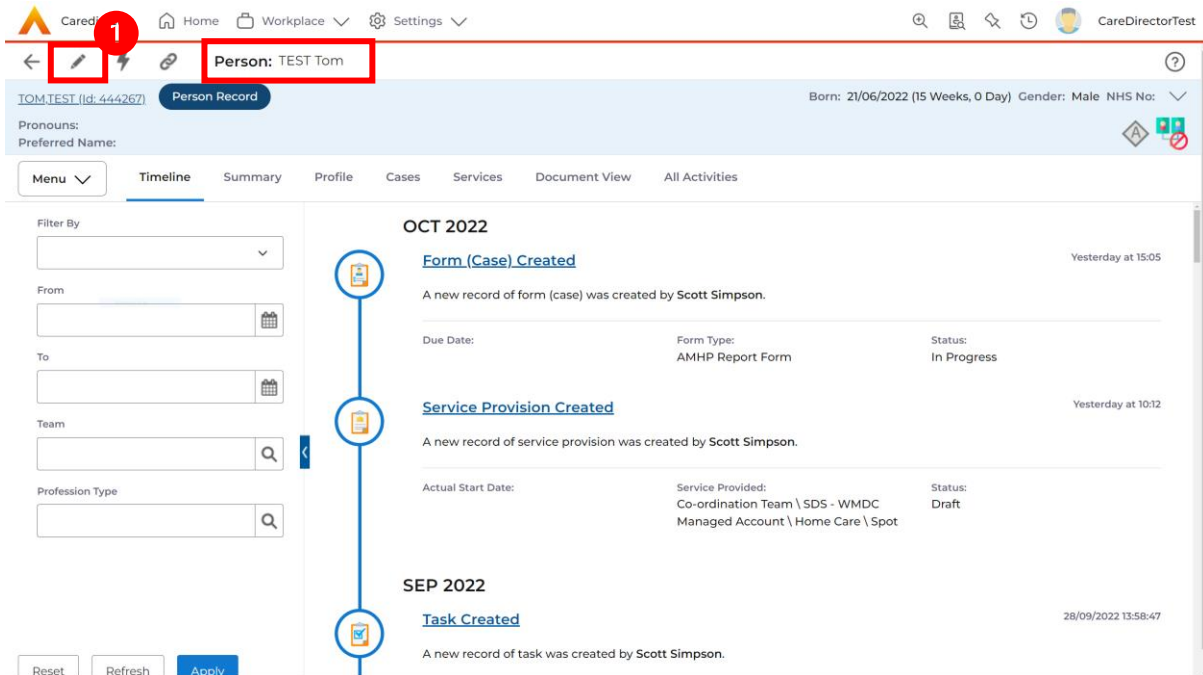


2. Enter their details provided. When finished, select **Search**.

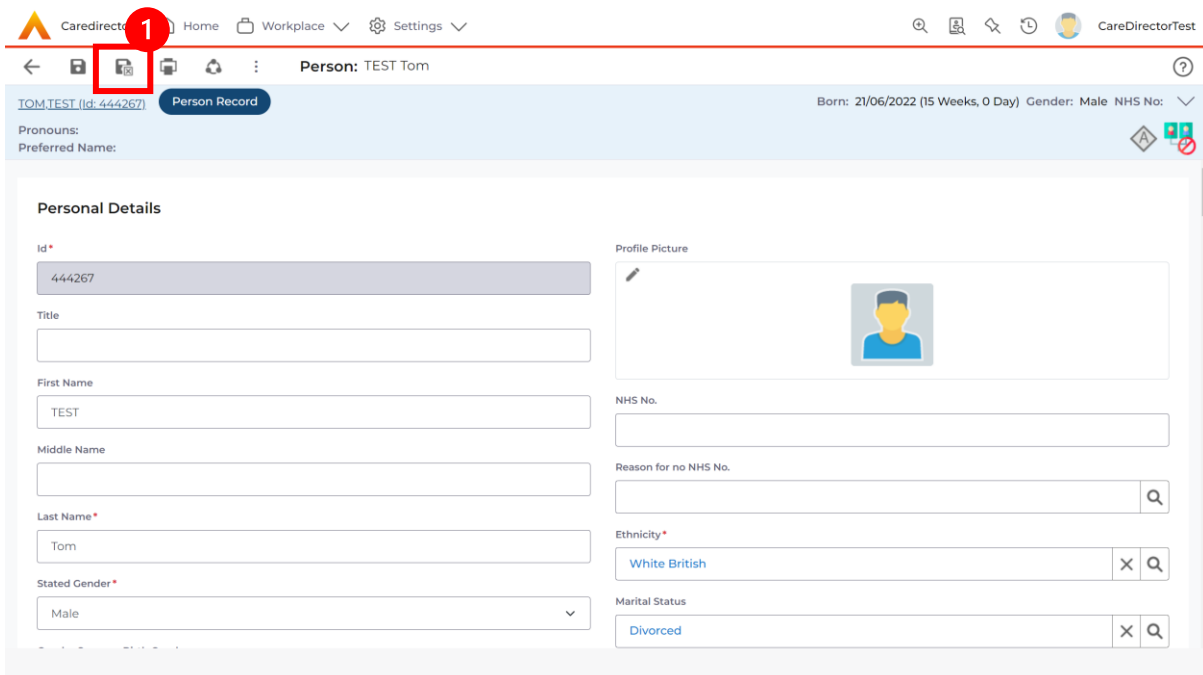
3. Select from the list on the right-hand side. This will open their **Person Record**.

## Updating Person Details

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

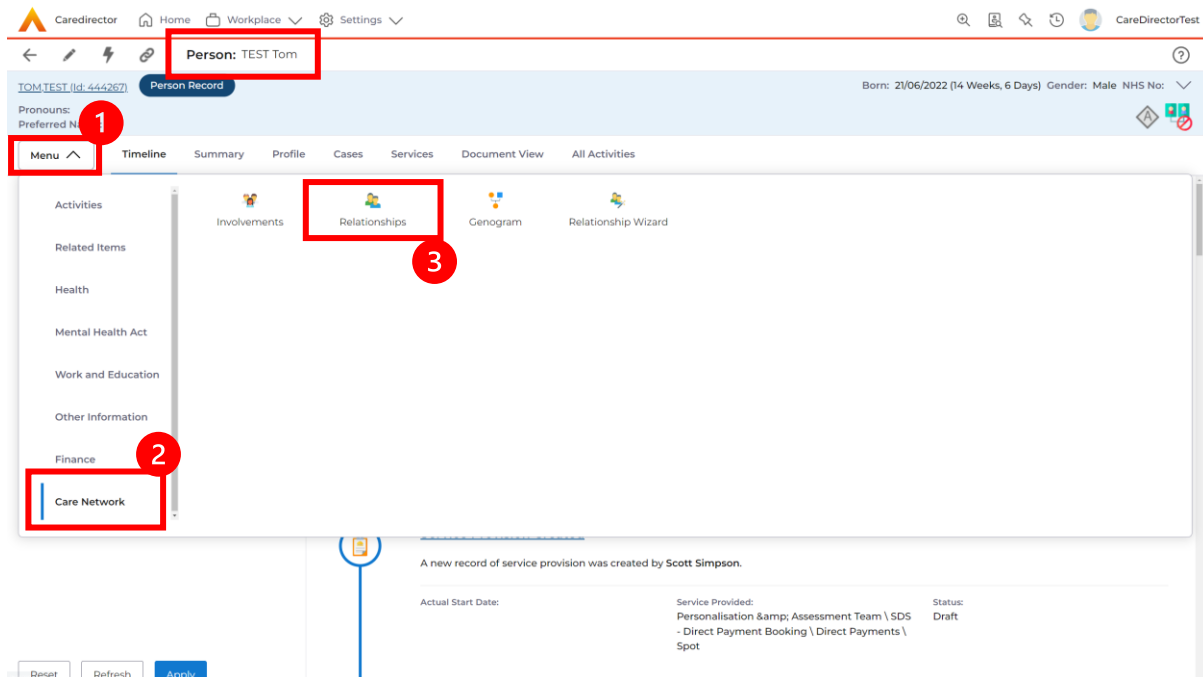


2. This will open the **Person Creation Screen**. Scroll down and edit the details required. When finished, select **Save and Return to Previous Page**.

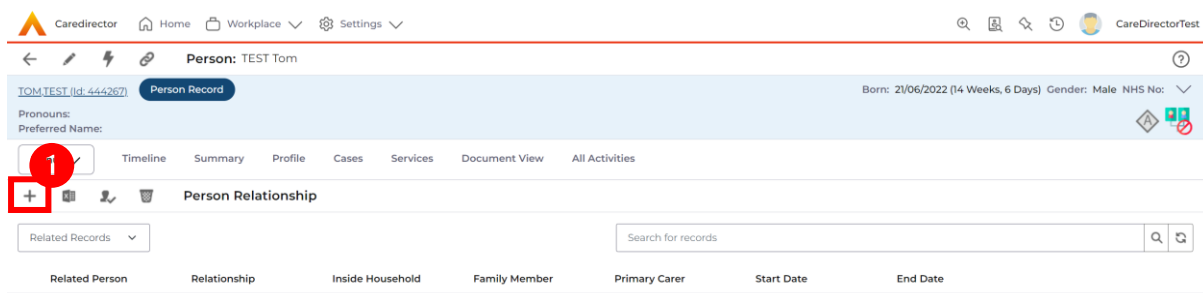


## How to add relationships

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



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



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

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 Enter Date of Death

1. Locate the **Person Record** and select the **Edit** icon on the toolbar.

The screenshot shows the CareDirector interface for a person record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a toolbar with a back arrow, an edit icon (pencil) highlighted with a red box and a '1' in a red circle, and a 'Person: Test Tom' label also highlighted with a red box. The main content area shows the 'Person Record' for 'TOM,Test (Id: 446229)'. The record details include 'Born: 03/05/1996 (26 Years)', 'Gender: Male', and 'NHS No:'. Below this is a 'Menu' dropdown and a 'Timeline' tab. The timeline shows two entries for 'OCT 2022': 'Form (Case) Created' and 'Task Created', both by Scott Simpson. The 'Form (Case) Created' entry has a due date of '20/11/2022' and a status of 'In Progress'. The 'Task Created' entry has a status of 'In Progress'.

2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes**.

The screenshot shows the 'Death Information' section of the person record. The 'Deceased' option is set to 'Yes' (radio button selected). The 'Cause of Death' field is empty with a search icon. The 'Place of Death' field is empty. The 'Date of Death' field is empty with a calendar icon.

3. Enter in the details if known, when finished select **Save**. This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker**.

## Edit Person Record (Address)

1. Locate the **Person Record**. Once inside, select the **Edit** button on the toolbar (pencil icon).

The screenshot shows the 'Person Record' page for TOM TEST (Id: 444267). The top navigation bar includes 'CareDirector', 'Home', 'Workplace', and 'Settings'. The toolbar contains a pencil icon (highlighted with a red box and a circled '1'), a lightning bolt icon, and a share icon. The page title is 'Person: TEST Tom'. Below the title, there are tabs for 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is active, showing a vertical timeline with three activity cards: 'Service Provision Created' (OCT 2022), 'Task Created' (SEP 2022), and another 'Service Provision Created' (SEP 2022). Each card includes details like 'Actual Start Date', 'Service Provided', 'Responsible Team', 'Responsible User', and 'Subject'.

2. When the **Person** creation screen is open, scroll down to the **Address** section and enter the updated address. Then select **Save and Return to Previous Page**.

The screenshot shows the 'Address' form within the 'Person Record' page. The 'Address' section title is highlighted with a red box. The form includes the following fields: 'Start Date of Address' (calendar icon), 'Address Type\*' (dropdown menu with 'Primary' selected), 'Property Name', 'Property No.', 'Street', 'Village/District', 'Town/City', 'County', 'Property Type', 'UPRN', 'Borough', 'Ward', 'Country', 'Accommodation Status' (dropdown menu), 'Accommodation Type', and 'Lives Alone'. Each text input field has a search icon on the right side.

## 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's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (15 Weeks, 0 Day)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. The timeline shows two events: 'Form (Case) Created' and 'Service Provision Created', both by Scott Simpson.

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

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

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team
<input type="checkbox"/>	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 trail is 'Person: Tom MullenTest'. The 'Cases' tab is selected, and a red box highlights the '+ Create New Record' button. Below the tabs, there is a search bar for records and a table of related records.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
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 trail is 'Case: New'. The form is titled 'Details' and contains several sections for entering case information.

**Contact Details**

Case No \* [Empty field]

Person \* Tom MullenTest [Dropdown menu]

Case Date/Time \* 07/10/2022 [Calendar icon] 09:00 [Clock icon]

Initial Contact [Empty field]

Date/Time Contact Received \* 06/10/2022 [Calendar icon] 11:00 [Clock icon]

Contact Received By \* Scott Simpson [Dropdown menu]

Contact Reason \* A - Adult Safeguarding [Dropdown menu]

Presenting Priority [Empty field]

Additional Information [Empty text area]

Referral Reason [Empty text area]

## How to check the Case Status

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

Person: TEST Tom

Person Record

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

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

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

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

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

Person Record

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

Menu | Timeline | **Details**

**Assignment Information**

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

Case Priority  
[input] [Q]

Responsible User  
[input] [Q]

Responsible Team \*  
AMHP Coordinator [Q]

Review Date  
[calendar icon]

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

## How to change the Case Status

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

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 currently 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 criteria section is highlighted with a red box and a '1' callout. The dialog box contains a table of case status options:

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

The 'OK' button 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.

Assignment Information

Case Status\*  
Assign To Team

Responsible User

Responsible Team\*  
CareDirectorTest

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**.

Case Status\*

Assign To Team

Case Statuses Enter your search criteria.

Look in: Social Care Case Status Lookup View

Search: Search for records

Name	Code
<input checked="" type="checkbox"/> Allocated	200013
<input type="checkbox"/> Assign To Team	200014
<input type="checkbox"/> Assigned to Team (unscheduled review)	
<input type="checkbox"/> Awaiting Allocation	200012
<input type="checkbox"/> Awaiting allocation (unscheduled review)	
<input type="checkbox"/> Closed	
<input type="checkbox"/> Closed & Logged As Enquiry	

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OK Close

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

Responsible User\*

🔍

**System Users** Enter your search criteria. 1

Look in: My Business Unit Users

Search: System Views

CareLiveIFD Wakefield CareDirectorTest  
 CareLiveInstall CareWo... CareDirectorTest  
 CareLiveInternal Wak... CareDirectorTest 2  
 CareLiveMigration Wa... CareDirectorTest  
 CareLivePlugin Wakefie... CareDirectorTest  
 CareLivePowerusr Wak... CareDirectorTest  
 CareTestIFD Account CareDirectorTest

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3 OK Close

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

**Assignment Information**

Case Status\* Allocated x 🔍

Case Priority  🔍

Responsible User\* Scott Simpson x 🔍

Responsible Team\* CareDirectorTest 🔍

Review Date  📅

1 📁 🔄 👤 🔍 🕒 👤 CareDirectorTest

## How to send a Case to another team

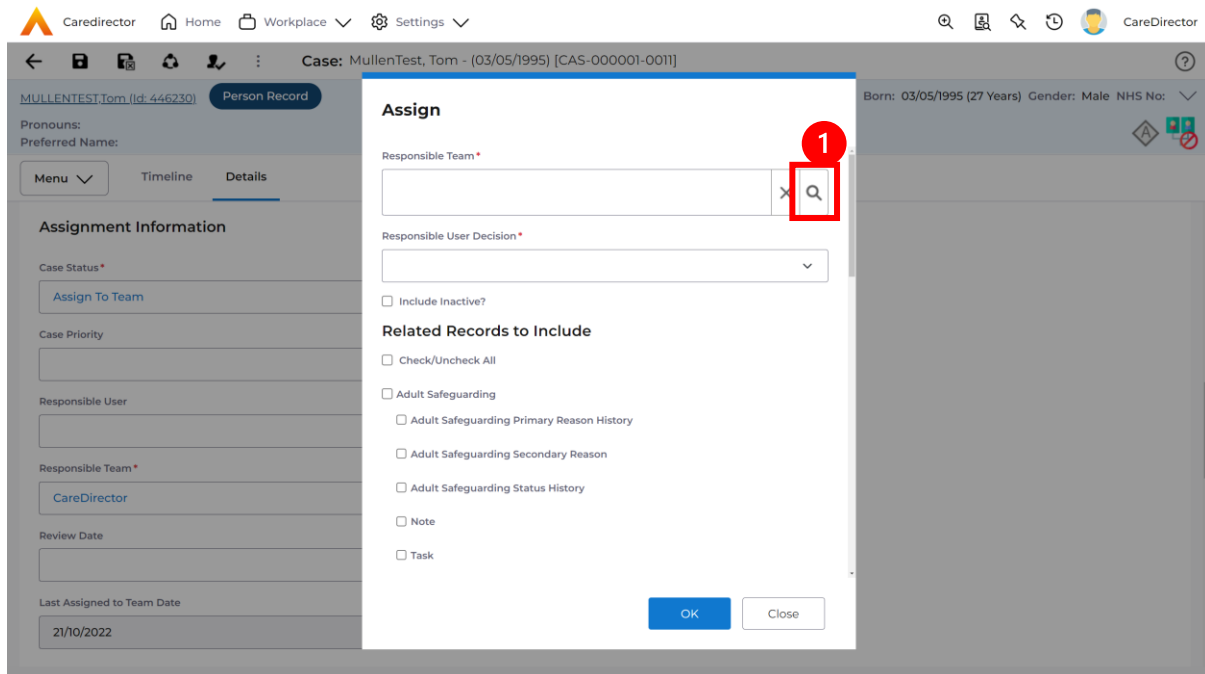
1. There may be reasons that a **Case** needs to be sent to another team.
2. Locate the **Case** that requires assigning to another team, if this **Case** has a **Responsible User**, then it will have the **Case Status** of **Allocated**.
3. First, change the **Case Status** to **Assign to Team** using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

The screenshot shows the CareDirector interface for a case named 'MullenTest, Tom - (03/05/1995) [CAS-000001-0011]'. The 'Assignment Information' section is visible, with the 'Case Status' dropdown set to 'Assign To Team'. A red box labeled '2' highlights the 'Save' button in the top toolbar. A red box labeled '1' highlights the search icon in the 'Case Status' dropdown menu.

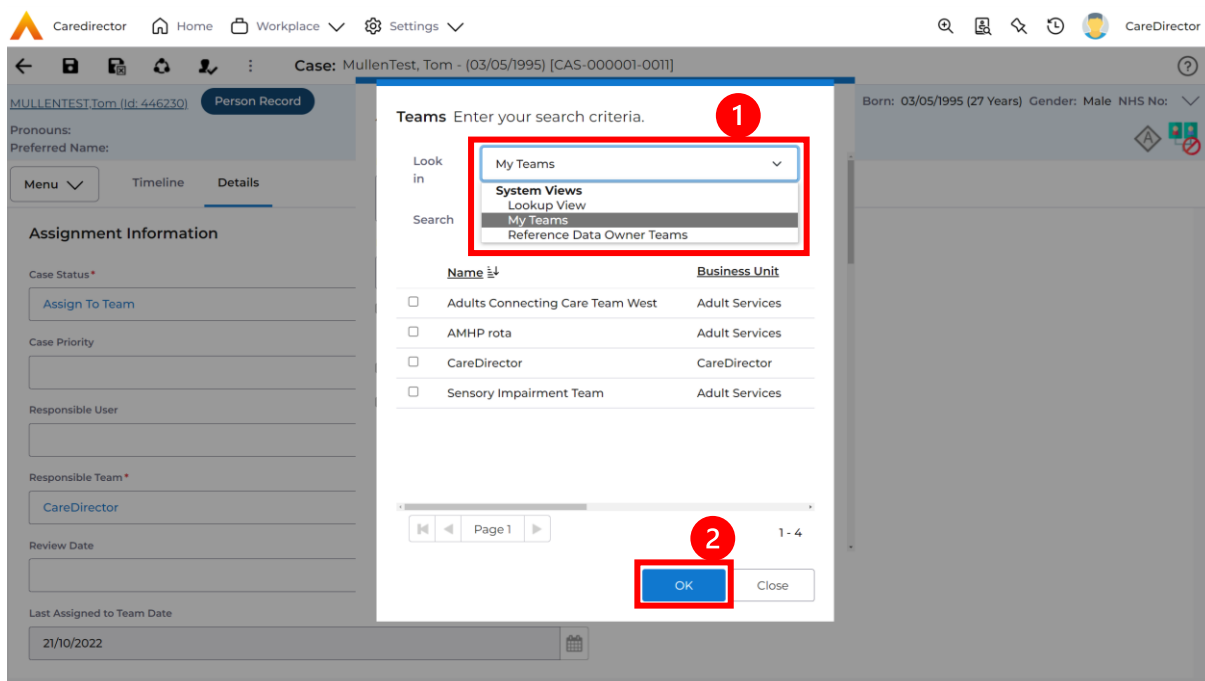
4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for the same case. The 'Assignment Information' section is visible, with the 'Case Status' dropdown set to 'Assign To Team'. A red box labeled '1' highlights the 'Assign to Team' button in the top toolbar.

- 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**.

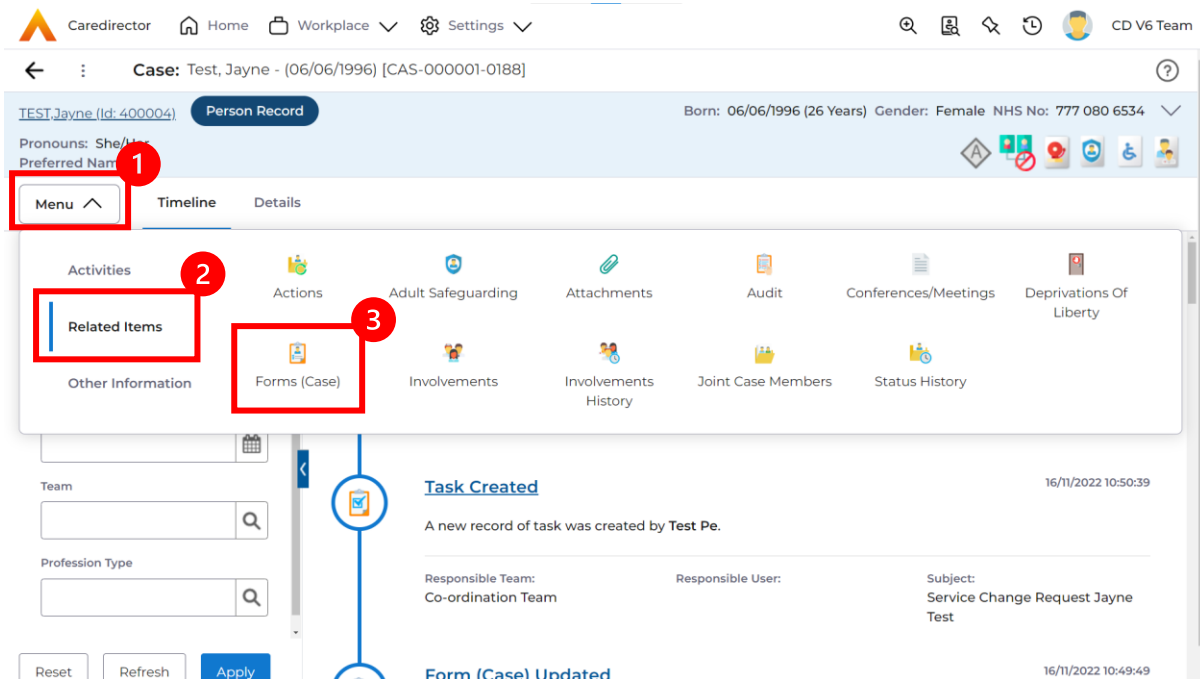
The screenshot shows the 'Assign' modal in CareDirector. The 'Responsible Team' is set to 'Sensory Impairment Team'. The 'Responsible User Decision' dropdown is set to 'Do not change'. The 'Responsible User' field in the background is highlighted with a red box. The modal also includes options for 'Include Inactive?' and 'Related Records to Include' with checkboxes for 'Check/Uncheck All', 'Adult Safeguarding', 'Adult Safeguarding Primary Reason History', 'Adult Safeguarding Secondary Reason', 'Adult Safeguarding Status History', and 'Note'. There are 'OK' and 'Close' buttons 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.



## COT & SI Secondary Allocation Form Process

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



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

Form Type \*

Form Type \*

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

Status \*

## How to find Activities

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

My Active Tasks/Notes

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

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

Person: Test Tom

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

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

All Activities

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
<input type="checkbox"/> Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
<input type="checkbox"/> Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
<input type="checkbox"/> Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
<input type="checkbox"/> Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

Search

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

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' filter panel is open on the left. The 'From' date field is highlighted with a red box and a '1' callout. The 'Search' button is highlighted with a red box and a '2' callout.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

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

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' table is displayed. The 'Regarding' column is highlighted with a red box.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

## How to input an Activity

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

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

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

The screenshot shows the CareDirector interface for a person record. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below that, the case name 'Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]' is displayed. The main header shows 'Person Record' for 'TOM,TEST (id: 444276)' with birth date '24/07/1950 (72 Years)' and gender 'Male'. A 'Menu' button is highlighted with a red box and a '1'. A dropdown menu is open, showing 'Activities' highlighted with a red box and a '2'. Below the menu, there are input fields for 'Responsible User' and 'Responsible Team' (currently set to 'AMHP Coordinator').

The screenshot also shows a toolbar with a '+' icon highlighted with a red box and a '1'. Below the toolbar, there's a 'Related Records' section with a search bar and a table of records.

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

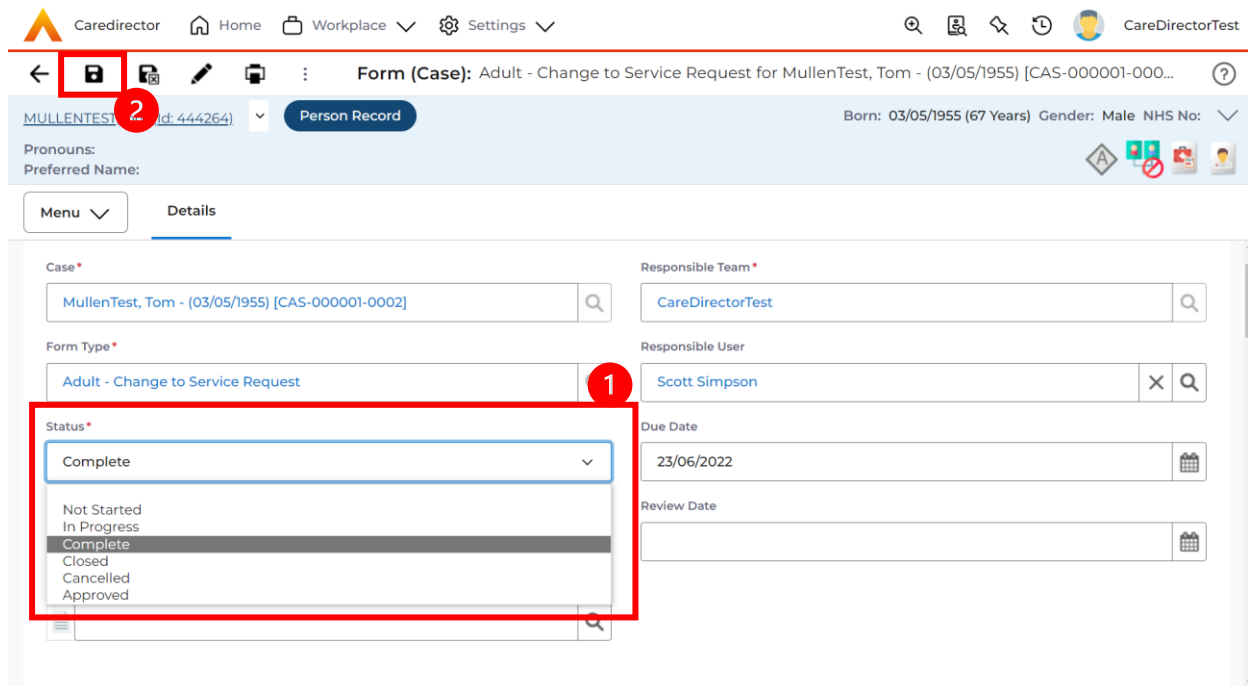
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the 'Case Note (For Case): New' form in the CareDirector system. The form includes several fields: Case, Reason, Priority, Date, Status, Responsible Team, Responsible User, Category, Sub-Category, and Outcome. The 'Responsible User' field is currently populated with 'Scott Simpson' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' icon in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'.

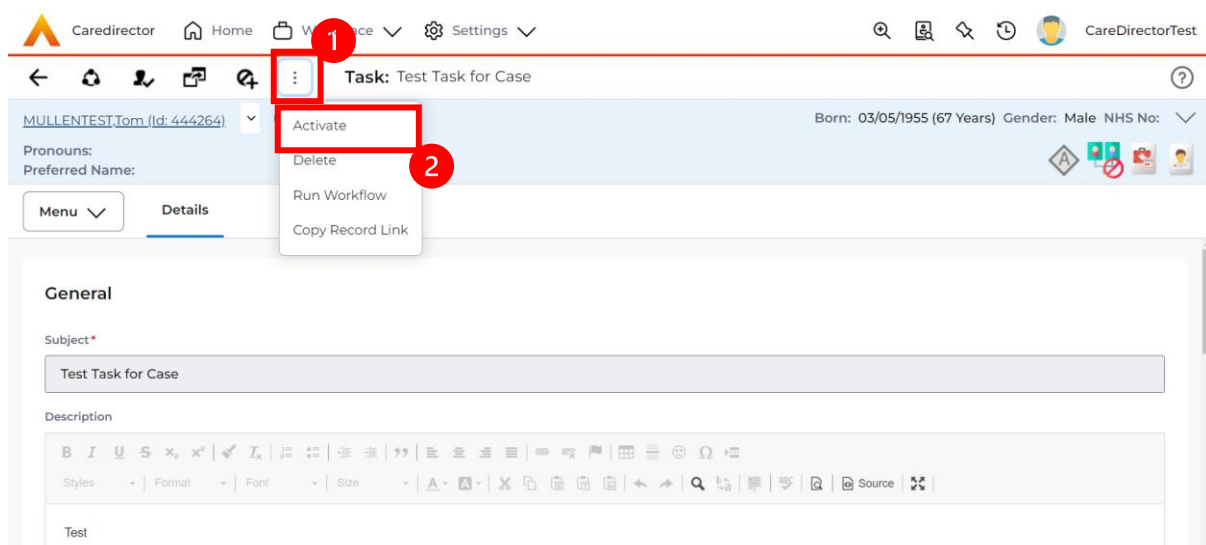
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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

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

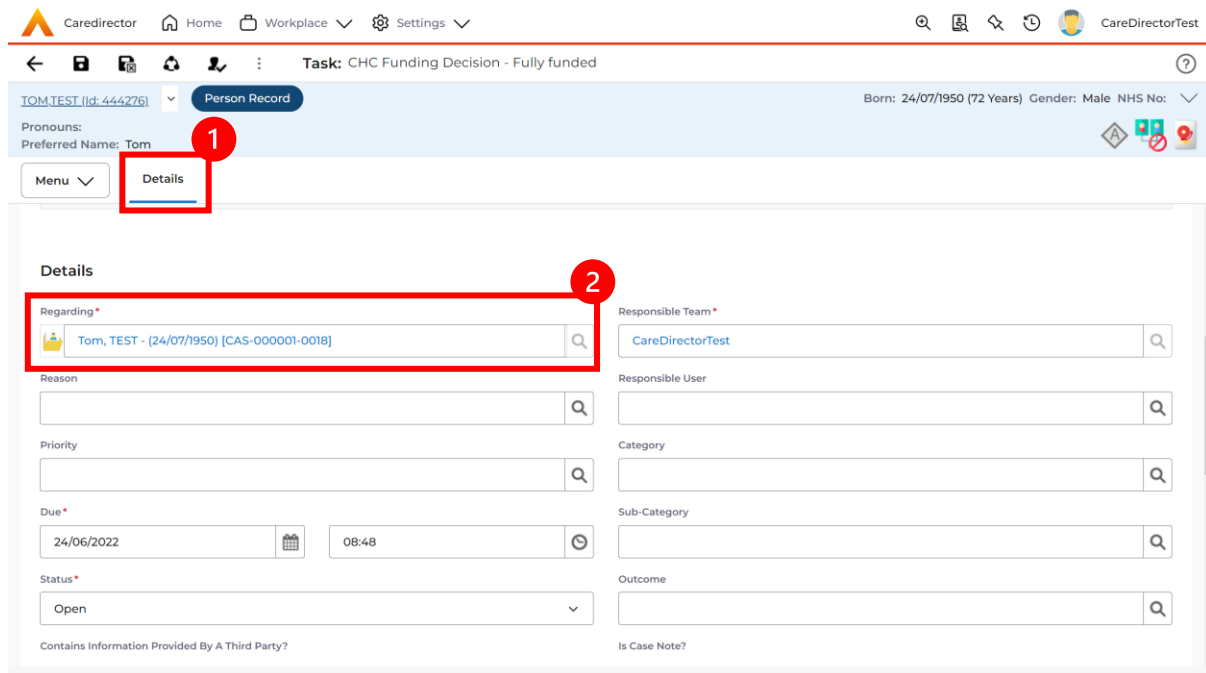


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

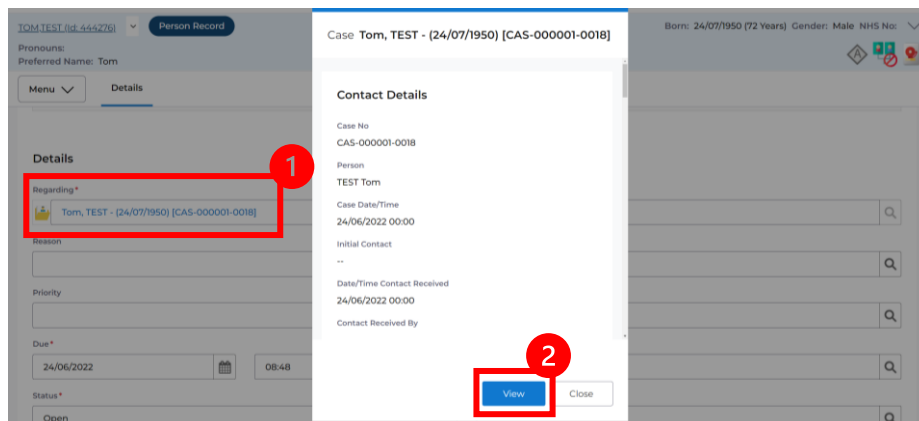


## How to tell if an Activity is linked to a Case or Person Record

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



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



## How to Allocate a new Activity to another team

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

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' 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 creating a new task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows 'Task: New' and 'Person Record' (highlighted with a red '2'). The form fields are as follows:

- Regarding\***: MullenTest, Tom - (03/05/1995) [CAS-000001-001] (with an 'X' icon)
- Responsible Team\***: Sensory Impairment Team (with an 'X' icon)
- Reason**: (empty field)
- Responsible User**: Scott Simpson (with an 'X' icon highlighted by a red box and a red '1')
- Priority**: (empty field)
- Category**: (empty field)
- Due\***: (empty field with a calendar icon)
- Sub-Category**: (empty field)
- Status\***: Open (dropdown menu)
- Outcome**: (empty field)
- 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. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main form is titled 'Details' and contains several fields:

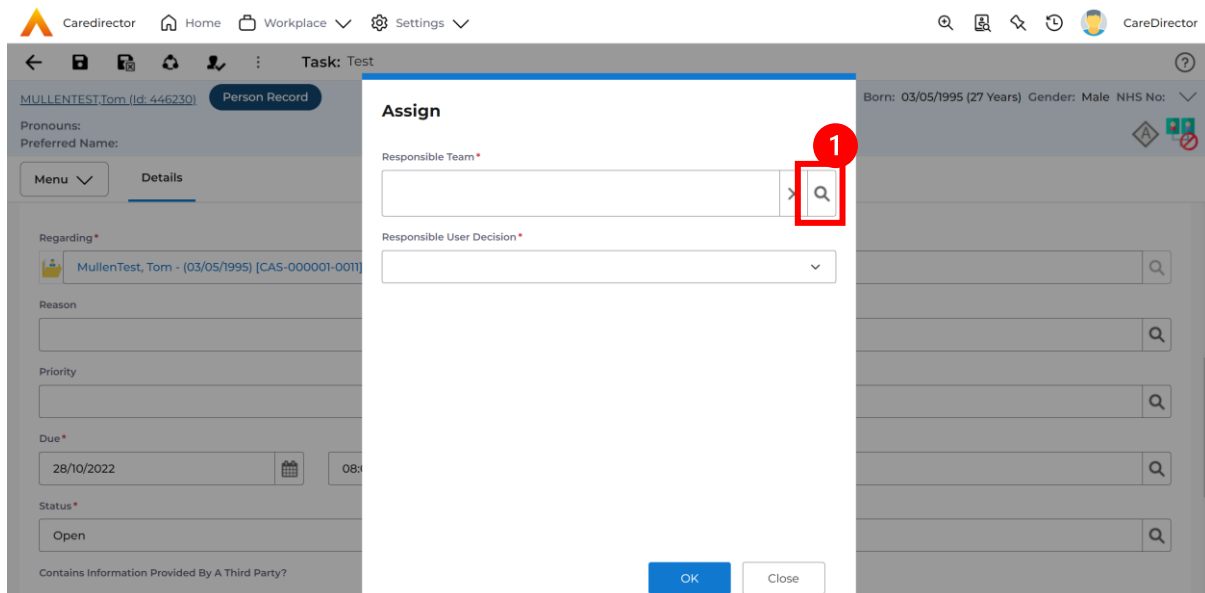
- Regarding\***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team\***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: Scott Simpson. A red box with a '1' highlights the 'X' icon in this field.
- Priority**: (Empty)
- Category**: (Empty)
- Due\***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status\***: Open
- Outcome**: (Empty)

A red box with a '2' highlights the toolbar icons at the top of the form, including a back arrow, a forward arrow, a refresh icon, and a save icon.

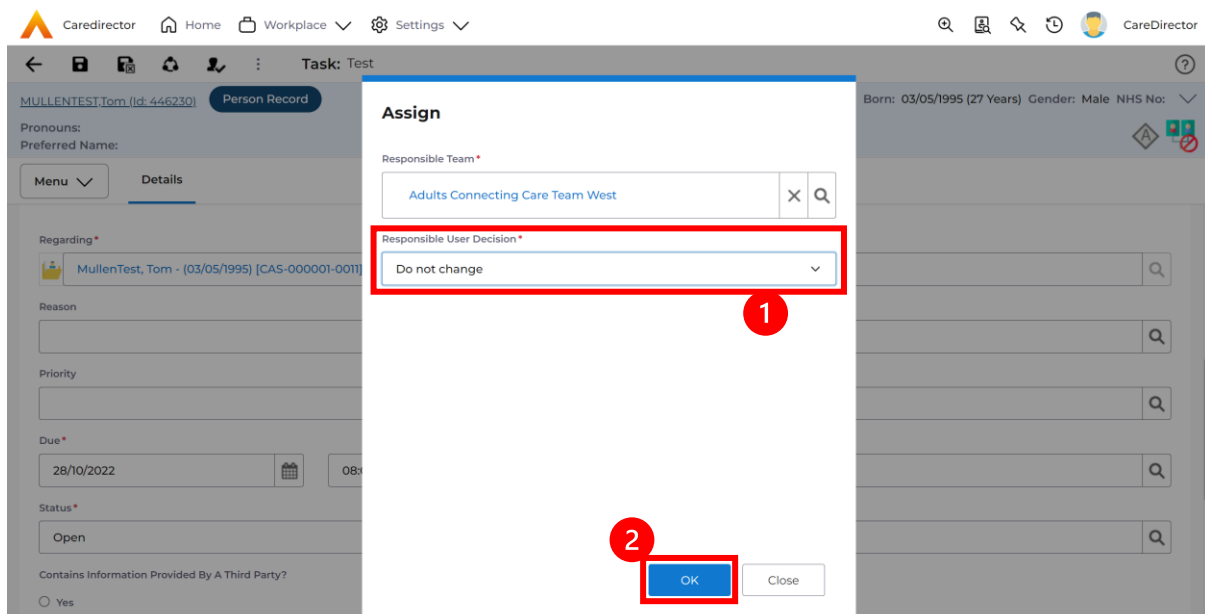
2. Next select **Assign this record to another team** from the toolbar.

This screenshot is similar to the previous one, showing the 'Details' form for the same task. The 'Responsible User' field is now empty. A red box with a '1' highlights the 'Assign this record to another team' icon in the toolbar, which is represented by a person icon with a plus sign.

- 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 upload Attachments

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

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' and 'Person Record' with a dropdown arrow. Below this, the record details include 'TOM.TEST (id: 444267)', 'Born: 21/06/2022 (15 Weeks, 0 Day)', and 'Gender: Male NHS No:'. A left-hand menu is visible with categories like 'Activities', 'Health', 'Mental Health Act', 'Work and Education', 'Other Information', 'Finance', and 'Care Network'. The 'Menu' is expanded, showing 'Related Items' and 'Attachments'. The 'Attachments' option is highlighted with a red box and the number 3. The 'Related Items' option is highlighted with a red box and the number 2. The 'Menu' dropdown is highlighted with a red box and the number 1.

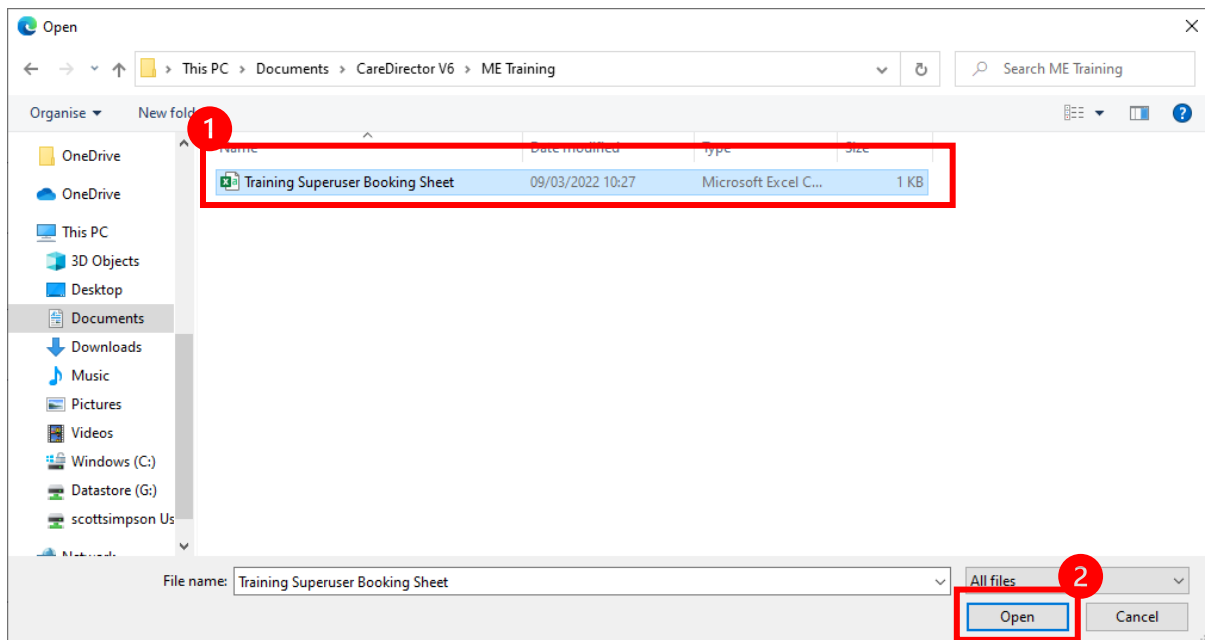
2. When opened, select the **Create New Record** from the toolbar.

The screenshot shows the 'Attachments (For Person)' screen in CareDirector. The top navigation bar is the same as in the previous screenshot. The main header shows 'Person: TEST Tom' and 'Person Record'. Below this, the record details are the same. The left-hand menu is visible. The 'Attachments (For Person)' screen is displayed, showing a toolbar with a '+ Create New Record' button highlighted with a red box and the number 1. Below the toolbar, there is a search bar with the text 'Search for records' and a search icon. Below the search bar, there is a table with columns: 'Title', 'Document Type', 'Document Sub Type', 'Date', 'Created By', and 'Created On'. The table is currently empty, and a message 'NO RECORDS' is displayed in the center of the table area, with the text 'No results were found for this screen.' below it.

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

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

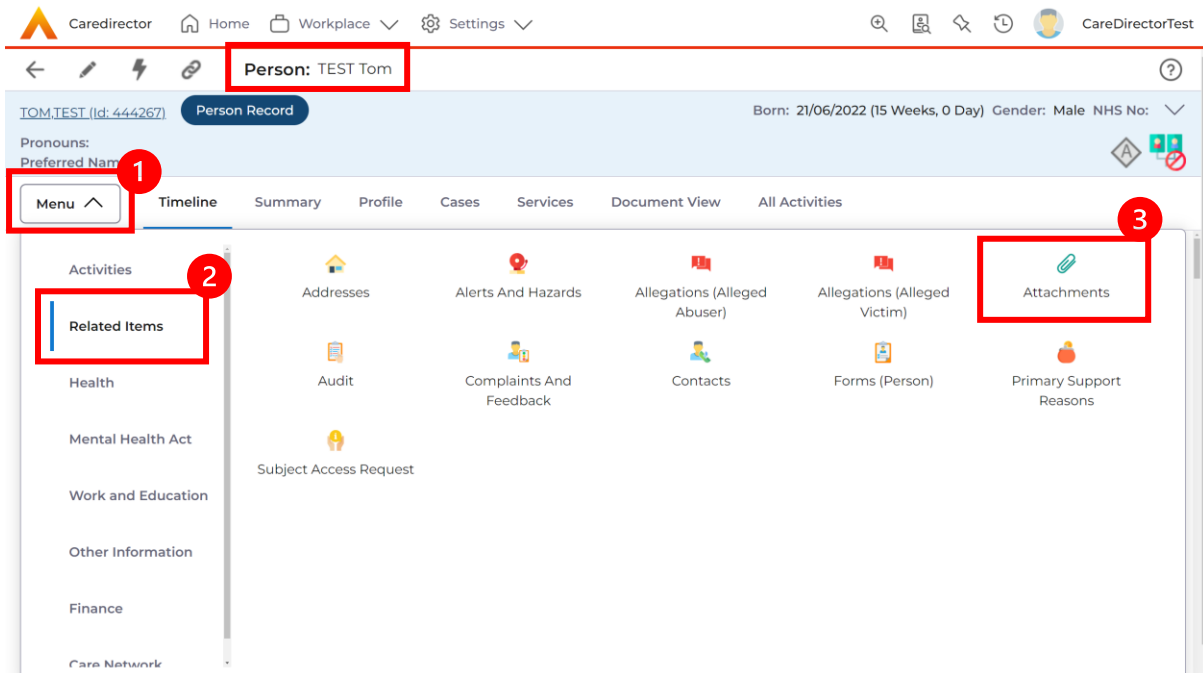
4. Select a **File** from your computer/ SharePoint and select **Open**.



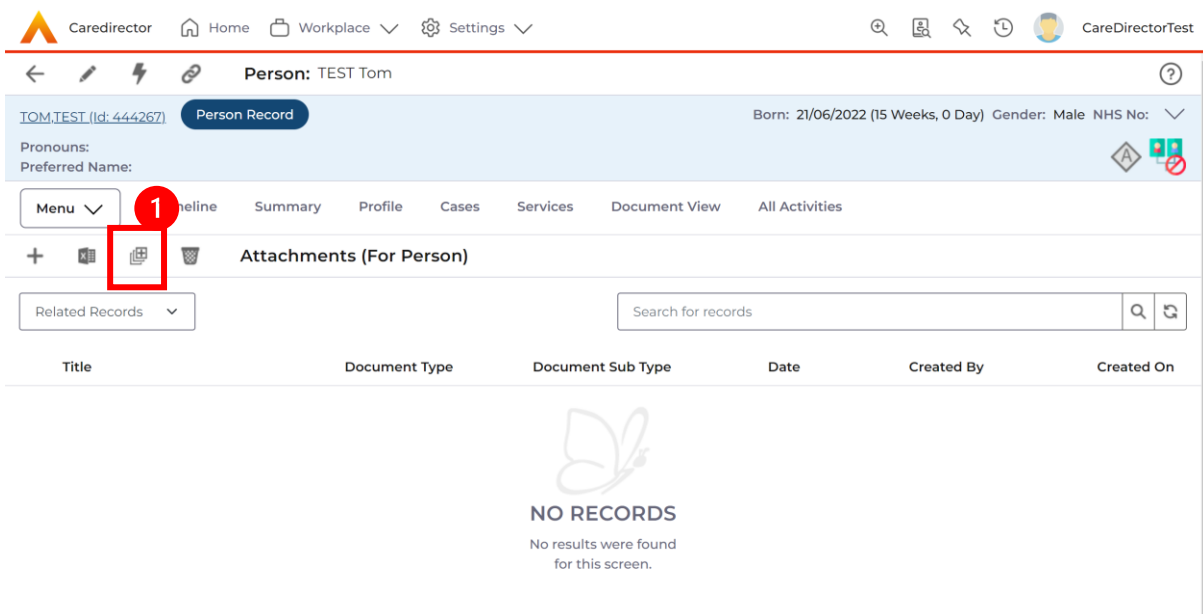
5. After uploading, the file name will appear and then select **Save** from the toolbar.

## How to upload multiple attachments

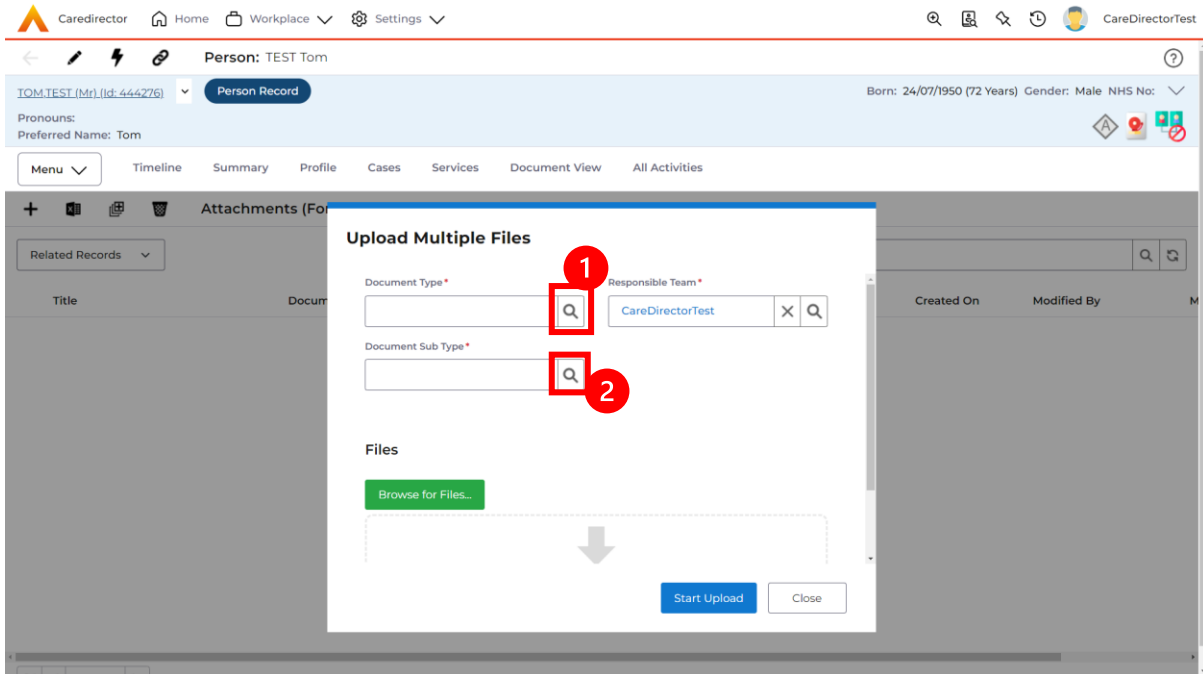
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



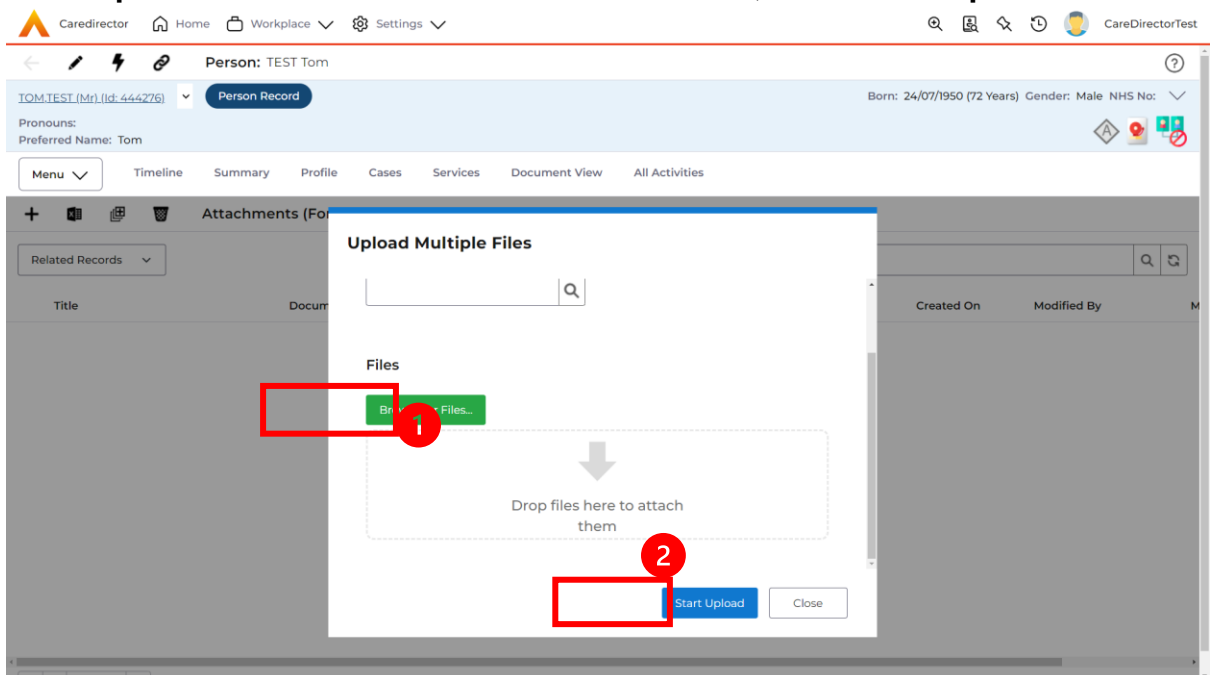
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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**.

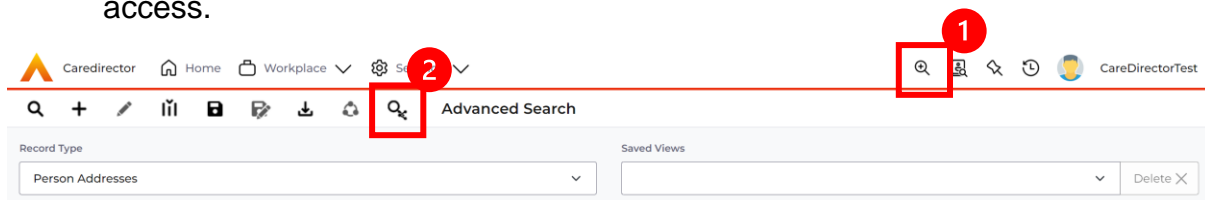


-



## How to 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 trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. Under 'Related Items', 'Forms (Case)' is highlighted. The main content area shows a timeline of events:

- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'. Involvement Member: Community Occupational Therapy Service, Role: Occupational Therapist, Start Date: 21/09/2022.
- Case Involvement Created** (21/09/2022 12:17:20): A new record of case involvement was created by Scott Simpson.

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

The screenshot shows the 'Forms (Case)' view for the same case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' menu item is selected. The view shows a table of related records:

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

## 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

Related Records Search for records

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

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

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

Person Record

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

Menu Timeline Details

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

Related Items Other Information Involvements History Joint Case Members Status History

Team

Profession Type

Reset Refresh Apply

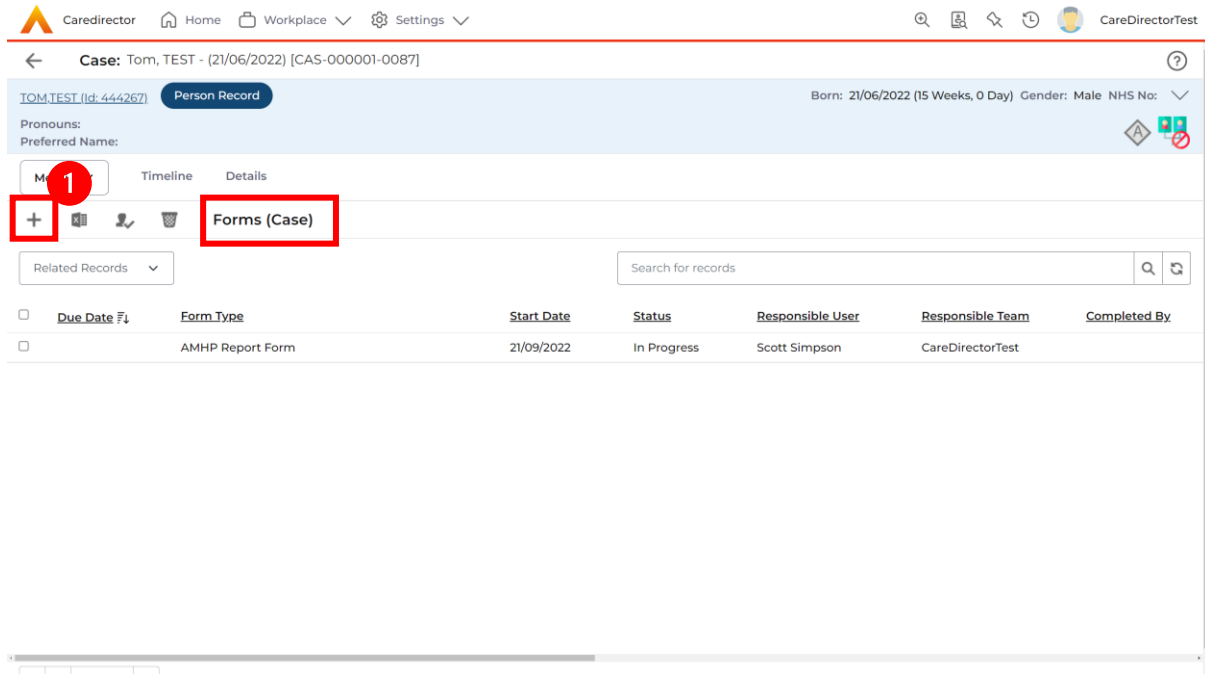
**Form (Case) Created** 21/09/2022 13:04:25  
A new record of form (case) was created by Scott Simpson.

Due Date: Form Type: AMHP Report Form Status: In Progress

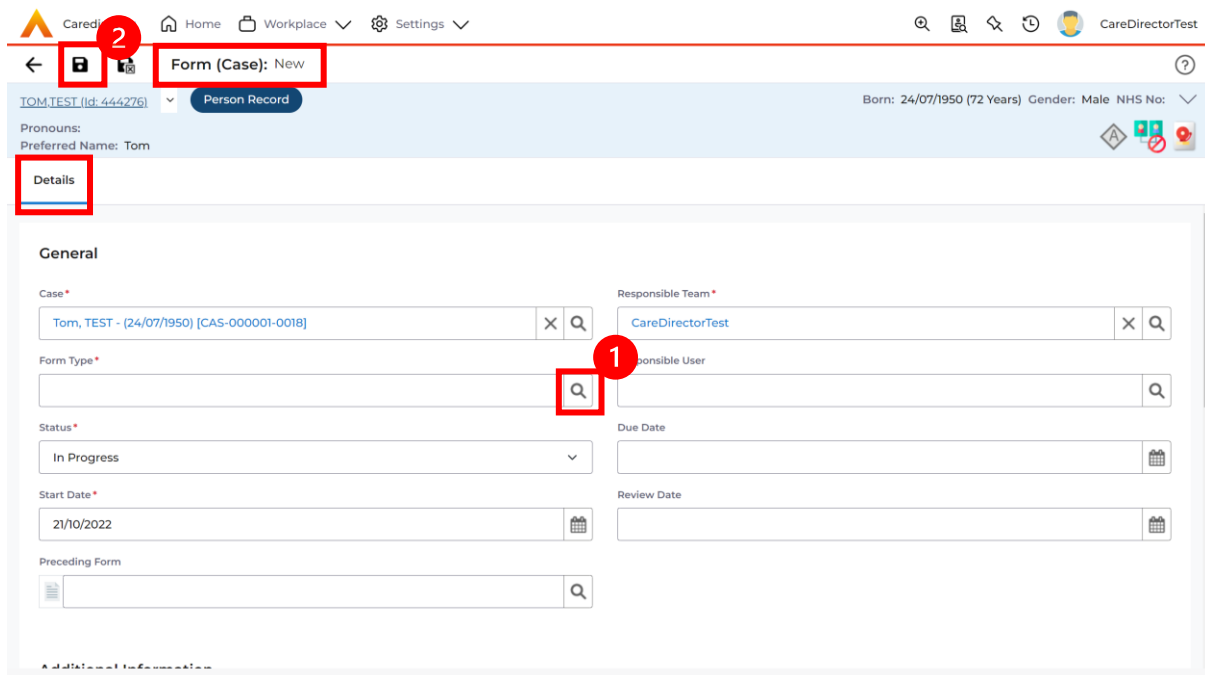
**Case Involvement Updated** 21/09/2022 12:23:12  
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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

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



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



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

The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The user is logged in as "CareDirectorTest". The page displays a "Person Record" for "TOM,TEST (Id: 444267)". The main content area is titled "General" and contains several form fields:

- Case \***: Tom, TEST - (21/06/2022) [CAS-00001-0087]
- Form Type \***: AMHP Report Form
- Status \***: In Progress
- Start Date \***: 21/09/2022
- Responsible Team \***: CareDirectorTest
- Responsible User**: Scott Simpson
- Due Date**: (empty)
- Review Date**: (empty)
- Preceding Form**: (empty)

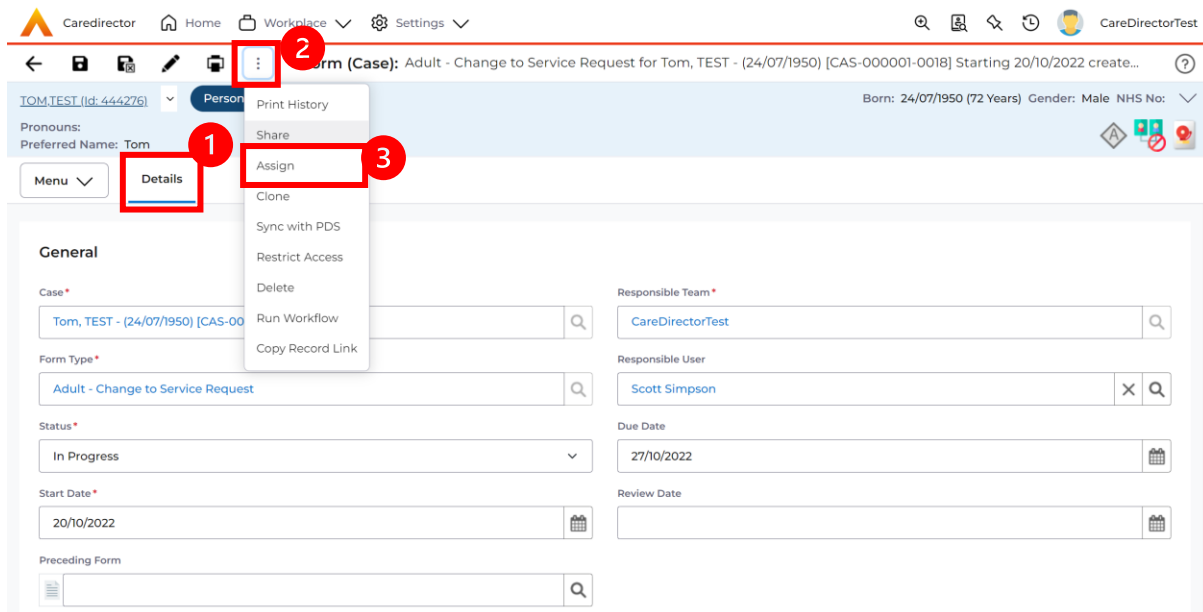
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

The screenshot shows the CareDirector interface for the "AMHP Report Form". The user is logged in as "CareDirectorTest". The page displays a "Person Record" for "TOM,TEST (Id: 444267)". The main content area is titled "AMHP Report Form" and contains several form sections:

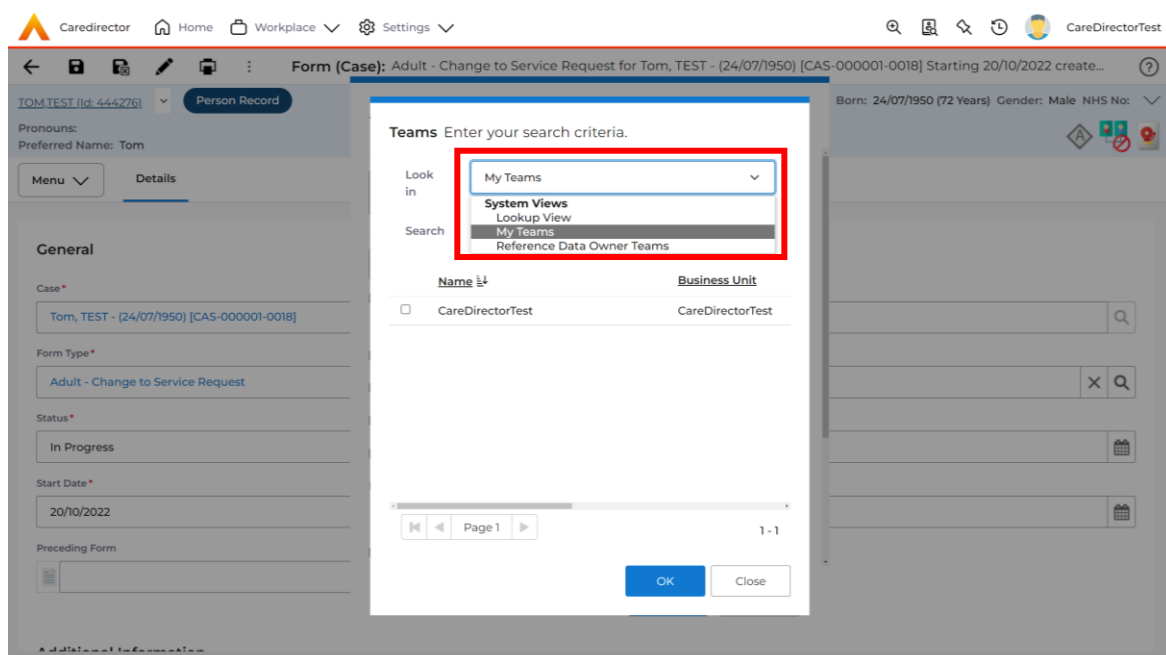
- Service User Details**
- Referral Details**
- Further Details**
- Background Information**
- AMHP'S Assessment of th...**
- Client previously known to services?**: Radio buttons for Yes and No.
- Ethnic Origin**: Radio buttons for various ethnicities including White - British / Northern Irish, White - Irish, White - Gypsy or Irish Traveller, White - Eastern European, Mixed - White and Black African, Mixed - White and Black Caribbean, Mixed - White and Asian, and Mixed - Other / Multiple.

## How to Allocate a Form

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



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



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

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 \***: Accommodation Team
- Responsible User Decision \***: Clear on current record only
- Include Inactive?**:
- Related Records to Include**:
  - Check/Uncheck All
  - Appointment
  - Assessment Factor
  - Attachment (Case Form)
  - Email
  - Email Attachment

The 'OK' button is highlighted with a red box, indicating the final step in the process.

## 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 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' is highlighted with a red box. Below it, the 'Menu' dropdown is open, and 'Related Items' is selected, also highlighted with a red box. The 'Forms (Case)' option in the 'Related Items' sub-menu is highlighted with a red box and a red circle containing the number 3. The main content area shows a timeline of events, including 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

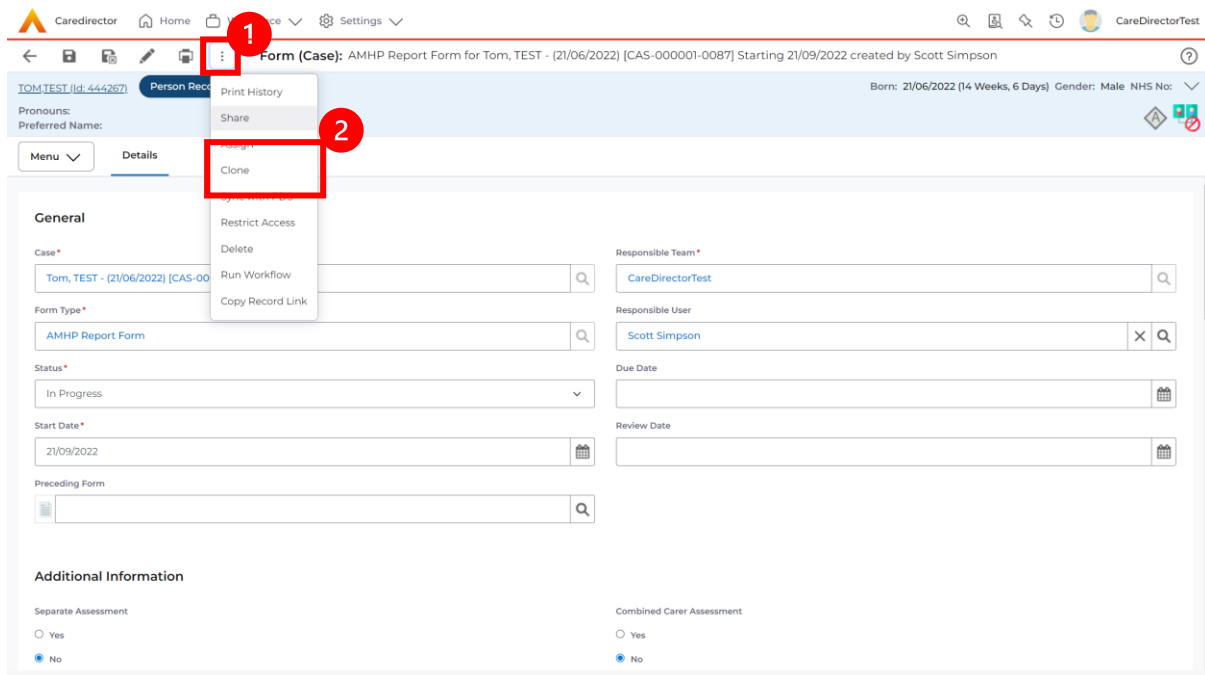
2. Select the relevant for **Form** to open.

The screenshot shows the 'Forms (Case)' sub-menu open. Below it, a table of related records is displayed. The table has the following columns: Due Date, Form Type, Start Date, Status, Responsible User, Responsible Team, Completed By, and Completion Date. The first row is highlighted, showing a record for 'AMHP Report Form' created on 21/09/2022, with status 'In Progress', responsible user 'Scott Simpson', and responsible team 'CareDirectorTest'.

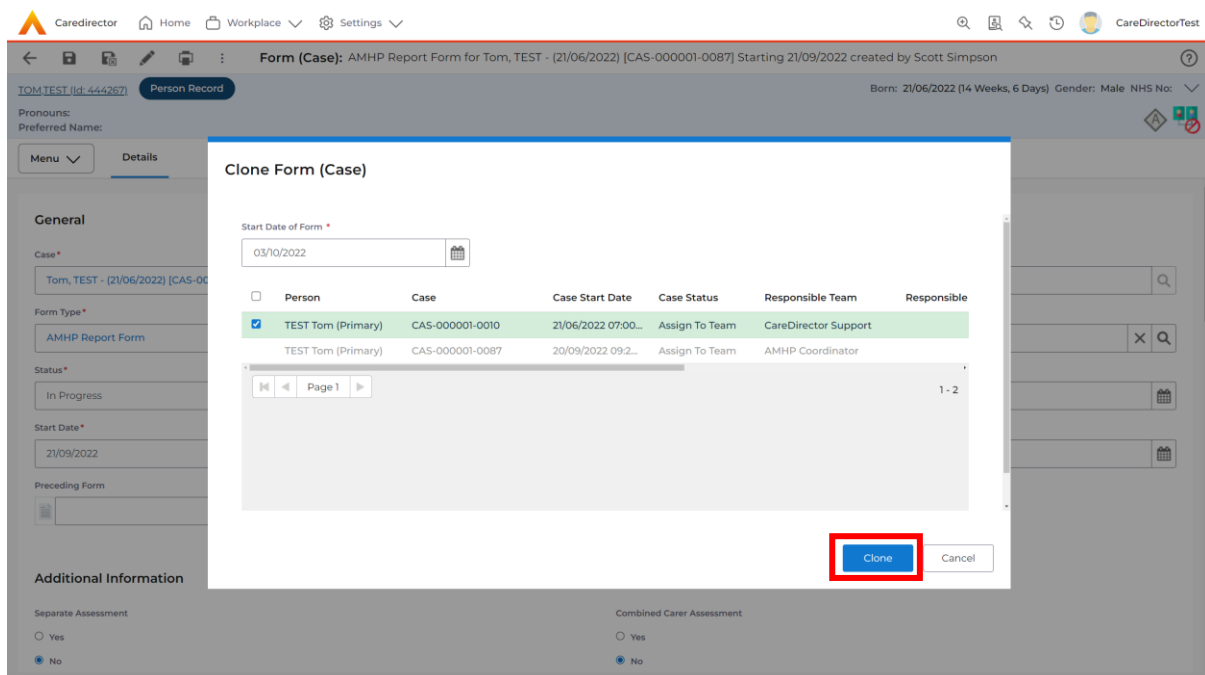
Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			



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**.

**Form (Case):** Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...

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

Pronouns: Preferred Name:

Menu  Details

### General

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

**Form Type\***  
Adult Care and Support Plan

**Status\***  
Closed

**Start Date\***  
09/11/2022

**Responsible Team\***  
CareDirectorTest

**Responsible User**  
Scott Simpson

**Due Date**  
11/11/2022

**Review Date**

**Preceding Form**

### Completion Details

**Completed By\***  
Scott Simpson

**Completion Date\***  
09/11/2022

**Signed Off By\***  
Scott Simpson

**Signed Off Date\***  
09/11/2022

# 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.

The screenshot shows the CareDirector interface for a person record, specifically the 'Service Provisions' section. The 'Services' tab is selected with a red box and a red circle containing the number '1'. In the 'Service Provisions' toolbar, the 'Create New Record' button (a plus sign) is highlighted with a red box and a red circle containing the number '2'. Below the toolbar, there is a search bar and a table of related records.

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**.

The screenshot shows the 'Service Provision Statuses' dialog box. The 'Ready for Authorisation' status is selected. The 'OK' button is highlighted. Red callouts 1-4 indicate: 1. Status dropdown, 2. Selected status, 3. OK button, 4. Save button in the background.

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**.

The screenshot shows the 'Service Provisions' grid view. The 'Services' tab is selected. A service provision is selected with a checkbox. The 'Authorise' option is selected from the context menu. Red callouts 1-4 indicate: 1. Services tab, 2. Selected service provision, 3. Three dots menu, 4. Authorise option.

## 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 interface for a person record. The breadcrumb trail at the top is highlighted in red: "Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022". Below this, 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 "+" icon for creating a new record is highlighted with a red box and a red circle containing the number "2". The main content area shows a table with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and Wedr. The table is currently 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 * TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088...	Responsible Team * CareDirectorTest
Id * 188114	Rate Unit * Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time * 09:00	Units * 1.0000
Total Visits * 7	Total Units * 7.0000
Number of Carers * 1	

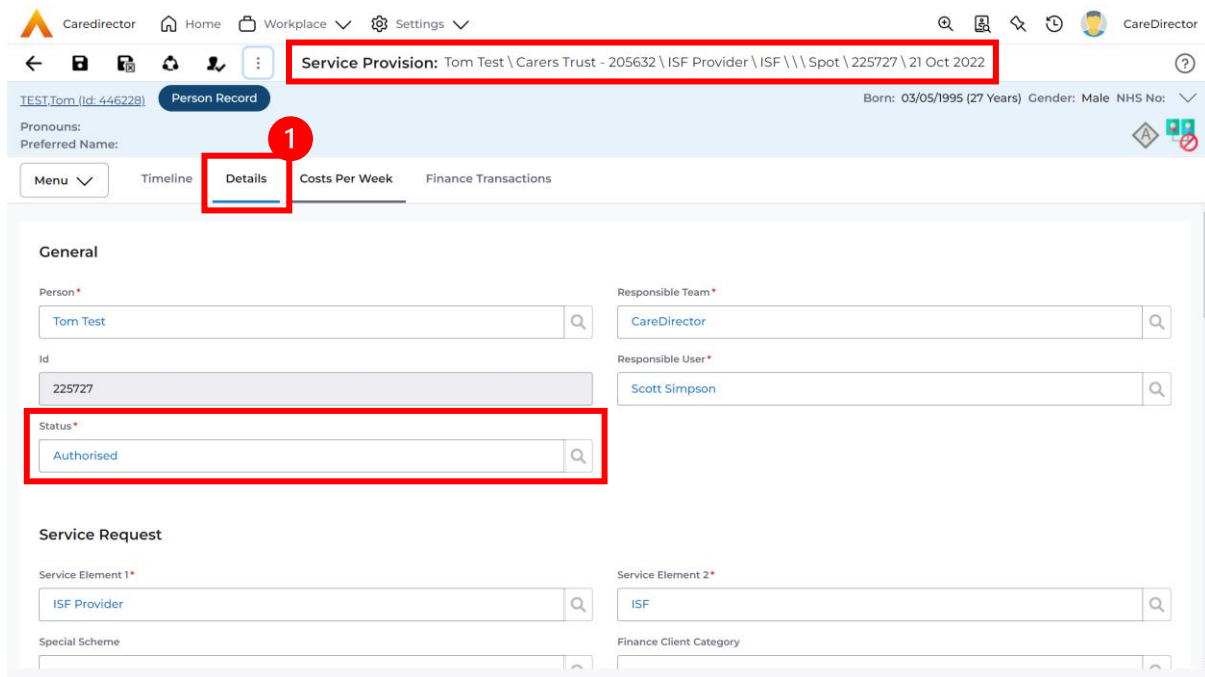
### Schedule applies to days

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

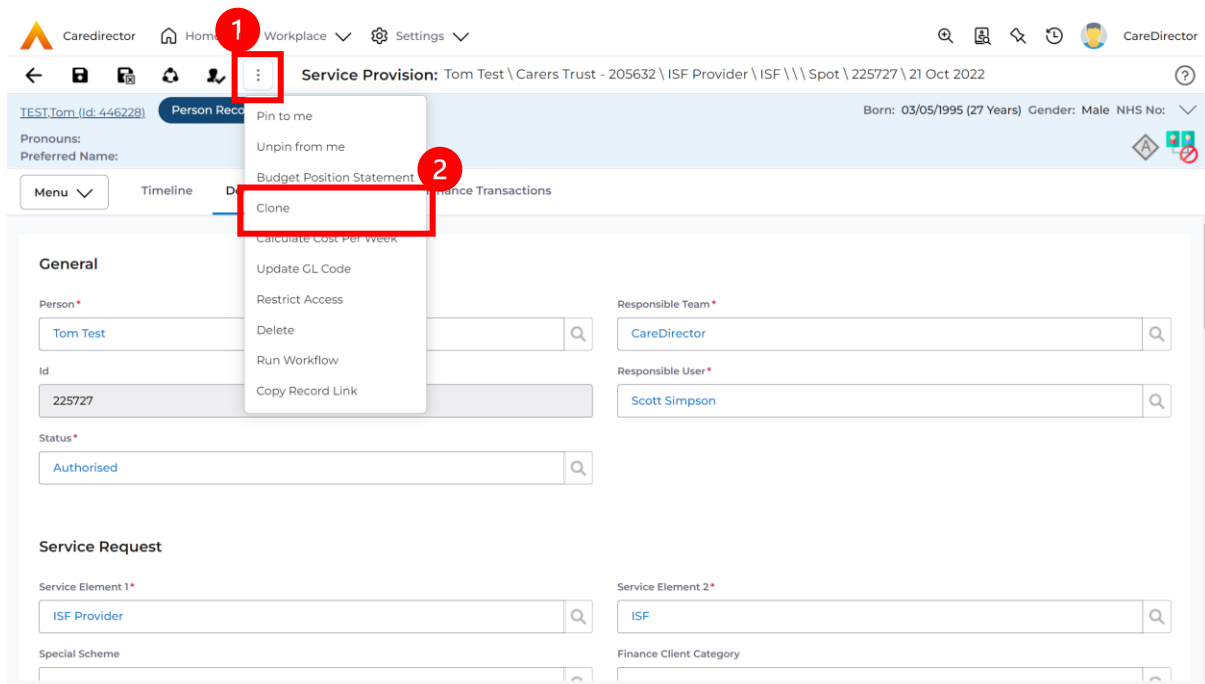
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

## How to Clone a Service Provision

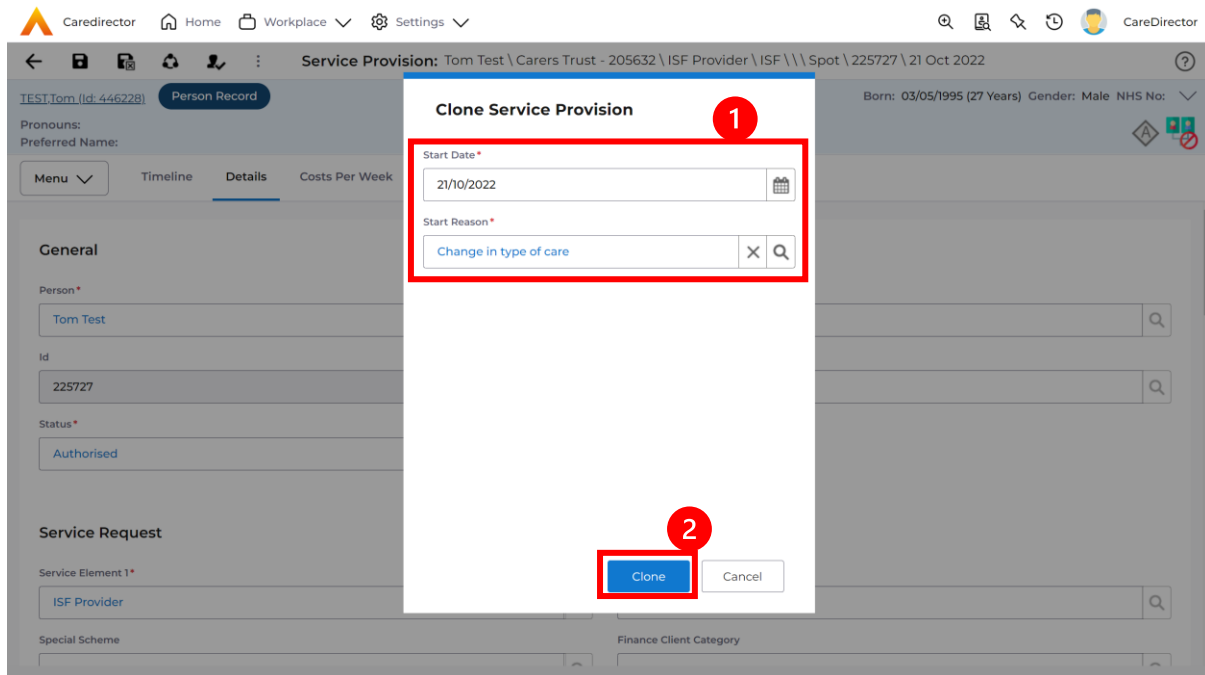
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



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



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





## How to End Service Provisions

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

The screenshot shows the CareDirector interface for a service provision. The breadcrumb trail is: Service Provision: TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \ \ Spot \ 220012 \ 24 Ju... The 'Person Record' button is highlighted with a red circle and the number '2'. The 'Details' tab is selected. The 'Dates' section is highlighted with a red box. The 'Actual End Date' field is highlighted with a red box and a red circle with the number '1'. The 'End Reason' field is also highlighted with a red box. The 'Actual End Date' is set to 21/10/2022 and the 'End Reason' is 'Carer's Decision'. The 'Commissioning' section shows the Purchasing Team as 'Adults Connecting Care Team East' and the Frequency in Weeks as 1.

## How to close a Case

### Ending Secondary Involvements

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




The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows the case title 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' and the user 'CareDirectorTest'. Below the header, the 'Person Record' section for 'TOM,TEST (Id: 444267)' is visible, including birth date, gender, and NHS number. A 'Menu' dropdown is open, showing a list of options: 'Activities', 'Related Items', 'Health', and 'Other Information'. The 'Related Items' option is selected, and a sub-menu is displayed with options: 'Actions', 'Adult Safeguarding', 'Attachments', 'Audit', 'Deprivations Of Liberty', 'Forms (Case)', 'Involvements', 'Involvements History', 'Joint Case Members', and 'Status History'. Red boxes and numbers 1, 2, and 3 highlight the 'Menu', 'Related Items', and 'Involvements' options respectively.

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




Caredirector Home Workplace Settings CareDirectorTest



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

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

Pronouns: Preferred Name:   

Menu ▾ Timeline Details

+    Case Involvements

Related Records ▾ Search for records  

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

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

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

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

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

## Close an Open Activity

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



The screenshot displays the CareDirector interface for a case record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below the case title, the 'Person Record' tab is active, showing 'TOM,TEST (Id: 444267)' and 'Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:'. The 'Menu' button is highlighted with a red box and a '1' in a red circle. The 'Activities' button is highlighted with a red box and a '2' in a red circle. The 'Activities' dropdown menu is open, showing options: 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. The 'Appointments' option is highlighted with a red box and a '3' in a red circle. Below the menu, there are search bars and form fields for 'Responsible User', 'Responsible Team\*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By\*', and 'Archive Date\*'.

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




Caredirector Home Workplace Settings CareDirectorTest



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

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

Pronouns: Preferred Name:  

Menu ▾ Timeline Details

+    **Tasks**

Related Records ▾ Search for records  

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

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

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus. The user profile 'CareDirectorTest' is visible in the top right. The main content area shows a task record titled 'Task: Referral has been Allocated' for user 'TOM.TEST (Id: 44426)'. A context menu is open over the record, listing options: Clone, Complete, Cancel, Restrict Access, Delete, Run Workflow, and Copy Record Link. The 'Complete' option is highlighted. Below the task title, there is a 'General' section with a 'Subject' field containing 'Referral has been Allocated' and a 'Description' field with a rich text editor toolbar. The toolbar includes options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Image, Table, Horizontal Line, Undo, Redo, Search, and Source. The character count at the bottom right of the description field is 'Characters (with HTML): 0/100000'.

## Closing a Case

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

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. A search bar contains the text 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the user profile 'TOM,TEST (Id: 444267)' is shown with a 'Person Record' button. The 'Details' tab is selected and highlighted with a red box and a red circle with the number '1'. The 'Assignment Information' section is visible, with the 'Case Status\*' field highlighted by a red box and a red circle with the number '2'. The 'Case Status\*' field contains the text 'Assign To Team'. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team\*' (containing 'AMHP Coordinator'), and 'Review Date'.



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

Caredirector Home Workplace Settings

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

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

Menu Timeline **Details**

### Assignment Information

Case Status \*  
   2

Case Priority

Responsible User

Responsible Team \*

Review Date

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

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below this, the 'Person Record' tab is active, showing 'Assignment Information' for 'TOM,TEST (Id: 444267)'. The 'Case Status\*' field is set to 'Assign To Team'. A modal window titled 'Case Statuses' is open, prompting the user to 'Enter your search criteria.' The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search bar contains 'Search for records'. A list of case statuses is displayed, with 'Closed & Logged As Enquiry' selected. The 'OK' button is highlighted with a red box.

	Name	Code	Gov C
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		
<input type="checkbox"/>	Closed		
<input checked="" type="checkbox"/>	Closed & Logged As Enquiry		
<input type="checkbox"/>	Closed as a Contact		
<input type="checkbox"/>	Closed Under Review		
<input type="checkbox"/>	Closure Request Rejected		
<input type="checkbox"/>	Closure Requested		
<input type="checkbox"/>	Enquiry led by other		

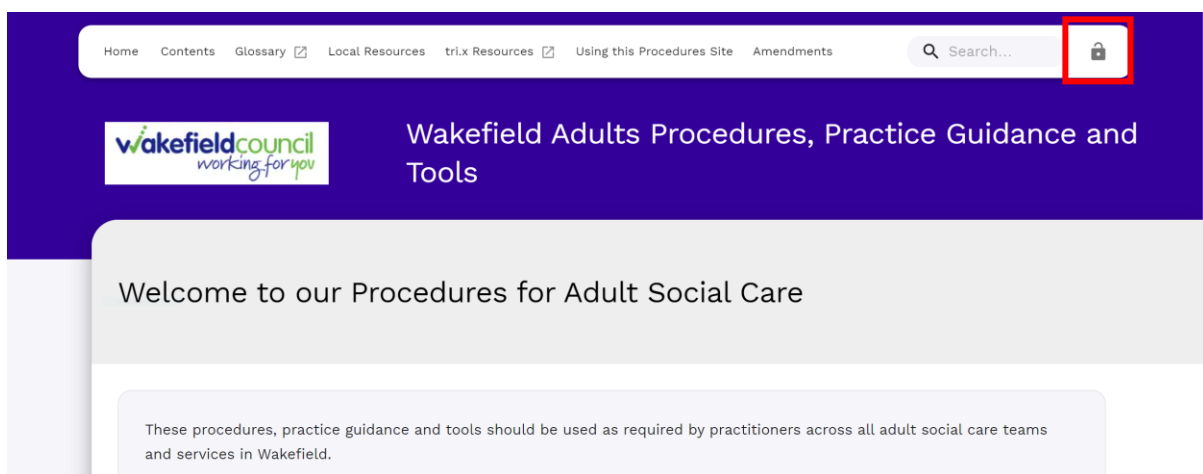
- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot displays the 'Assignment Information' section of the CareDirector interface. The 'Case Status' is set to 'Closed'. The 'Close Date' is 03/10/2022 at 13:43. The 'Closure Reason' is 'All Work Completed'. The 'Closure Accepted By' is 'Scott Simpson'. The 'Archive Date' is 28/10/2022. The 'Last Assigned to Team Date' is 20/09/2022. A red box highlights the 'Close Date', 'Closure Reason', 'Closure Accepted By', and 'Archive Date' fields.

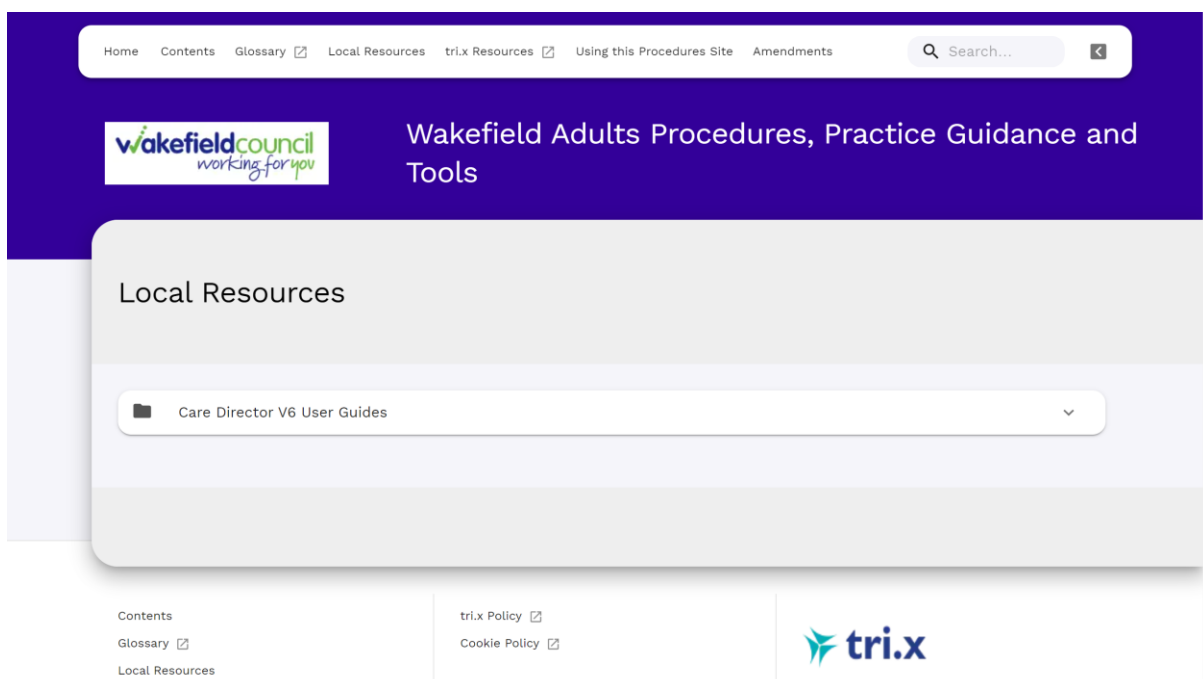
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

## Further CareDirector Guidance

1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.
2. Go to **Microsoft Edge** and copy and paste this URL:
  - a. <https://wakefieldadults.proceduresonline.antser.com/>
3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



## Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	06/10/2022
V1.0.1	Slight Change to Content	Scott Simpson	22/11/2022