V5 to V6 Functionality and Business Changes

V1.2

Document	CareDirector V5 to V6 Functionality and Business Changes.
Purpose	What changes have been made for the release of V6.
Version	V1.0
Owner	ICT Business Transformation Team / Adults System Support
Last Updated	01/11/2022

Contents

Terminology Changes

CareDirector V5	CareDirector V6	Description?
Referral	Case	A Referral is now labelled as a Case. However, it means the exact same.
Key Team	Responsible Team	A Responsible Team is required for most records in CD. This field can used as the allocation process of assigning a record to their team's dashboard.
Key Worker	Responsible User	A Responsible User is not mandatory for the system to allow saving. However, to allocate a record to a System User's dashboard, then enter a System User in the Responsible User field.

Workflows and Automated Tasks

1. Workflows are an essential part of sending information automatically. Here are some automated tasks that have been introduced.

2. Please be aware that Workflow's "trigger" differently. The triggers are:
   a. Updating a Record
   b. Creating a record
   c. Assigning a record
   d. Record Status Changes

3. Workflows take different lengths of time to activate. If you do not see the desired outcome instantly, it may mean you need to wait while it runs in the background.

New Workflows

Alongside the recreation of the workflows in CareDirector V5, some new workflows have been created as follows.

Location of Workflow	What does the workflow do?
Task, case note, phone call.	When the responsible team field is updated the responsible user field is cleared. This means that the person who created the task will no longer see the activity on their dashboard. Instead it will be visible on the dashboard for the responsible team.
Service provision	When a service provision is cancelled and an end reason added, the coordination team will be notified via task note.
Person record	When a date of death is entered against a person record, both the primary and secondary team will be notifed via task note.

Financial assessment	When a new financial assessment is created, the payments and income team will be notified via task note so that Agresso can be updated.
Involvements	If COT, SI or CTLD have an open secondary involvement, they cannot become the primary team. This will assist with business process and reporting as the team will need to close their involvement to become primary case holders.
Completion of the CHC checklist.	A task note for the CSO's/ admin will be created on completion of the CHC checklist.

New and Amended Forms

Several new and amended forms have been created with the system and are listed below.

Name of Form	New or amended	Purpose
Indicative Budget Tool	New	This replaces the Excel version of the form and is used to create an indicative budget.
FA referral - NRS	Amended	This has been amended to reflect the online financial assessment tool and to add a couple of additional questions needed by P&AT.
FA referral - Residential	Amended	This has been amended to reflect the online financial assessment tool and to add a couple of additional questions needed by P&AT
FA referral - Respite	Amended	This has been amended to add a couple of additional questions needed by the P&AT.
MCA and BI Form	Amended	This will now replace the Word document issued earlier this year.
Adults Safeguarding Triage Form	Amended	To be used by the adults triage team.
Sanctuary Referral	New	Used by WDDAS.
Adult Telecare Referral Form	Amended	This form has been amended to bring it more up to date.
Client Visit Risk Assessment	New	Used by WDDAS.
Deputy and Estates Team referral form	New	This will replace the need to e-mail requests to the team.
Adult Risk conversation record & risk enablement plan	New	This is a new risk based conversation record.

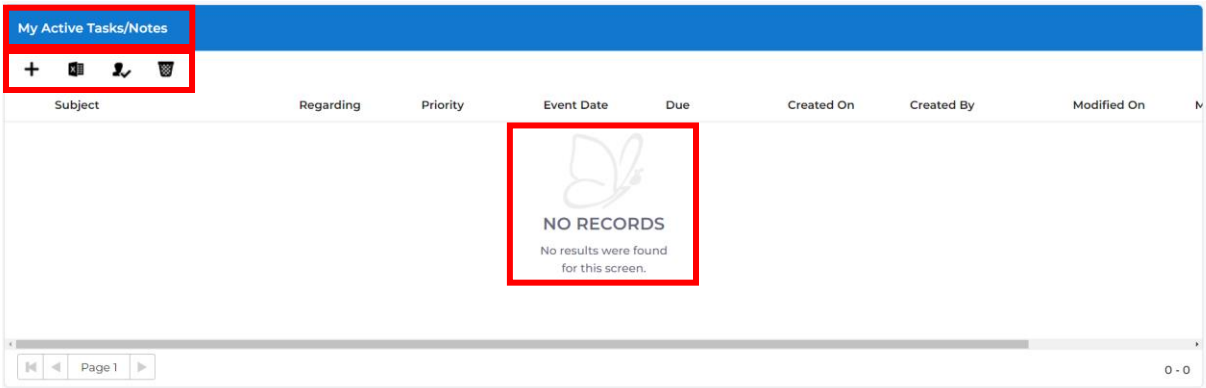
Dashboards

How do Dashboard's work

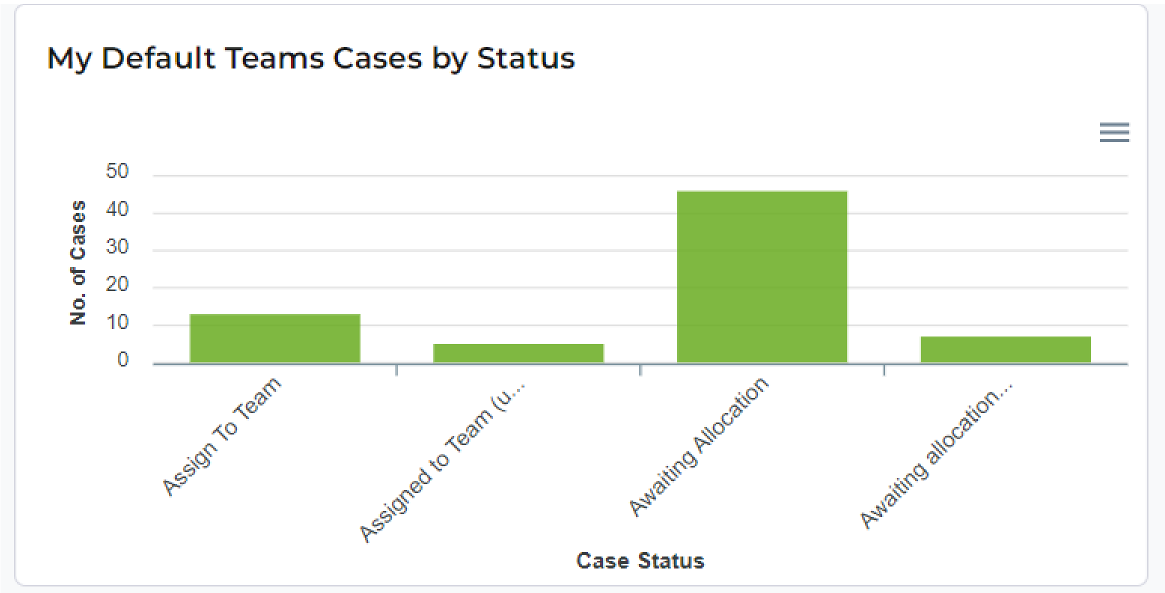
1. When an action requires work, the **Status** of the action will affect if it is sent to your own or teams' dashboard. This has not change since Version 5.

2. If an action is first sent to your teams' dashboard, this then can be allocated to a specific worker, therefore removing itself from the teams' dashboard and onto the workers.

3. You can see if an action requires work now through **widgets.** A **widget** is built up of three parts. The **Title** (what information is expected), a **Toolbar** and **Information** (in the form of a grid or a chart).



4. Information can be sorted by using the column headers and charts are interactable. Select the chart that you want to see, and it'll change into a grid view.

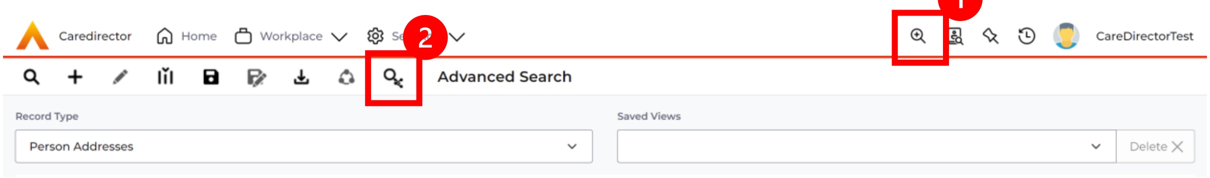


New Features in CareDirector Version 6

Advanced Searches/ Views

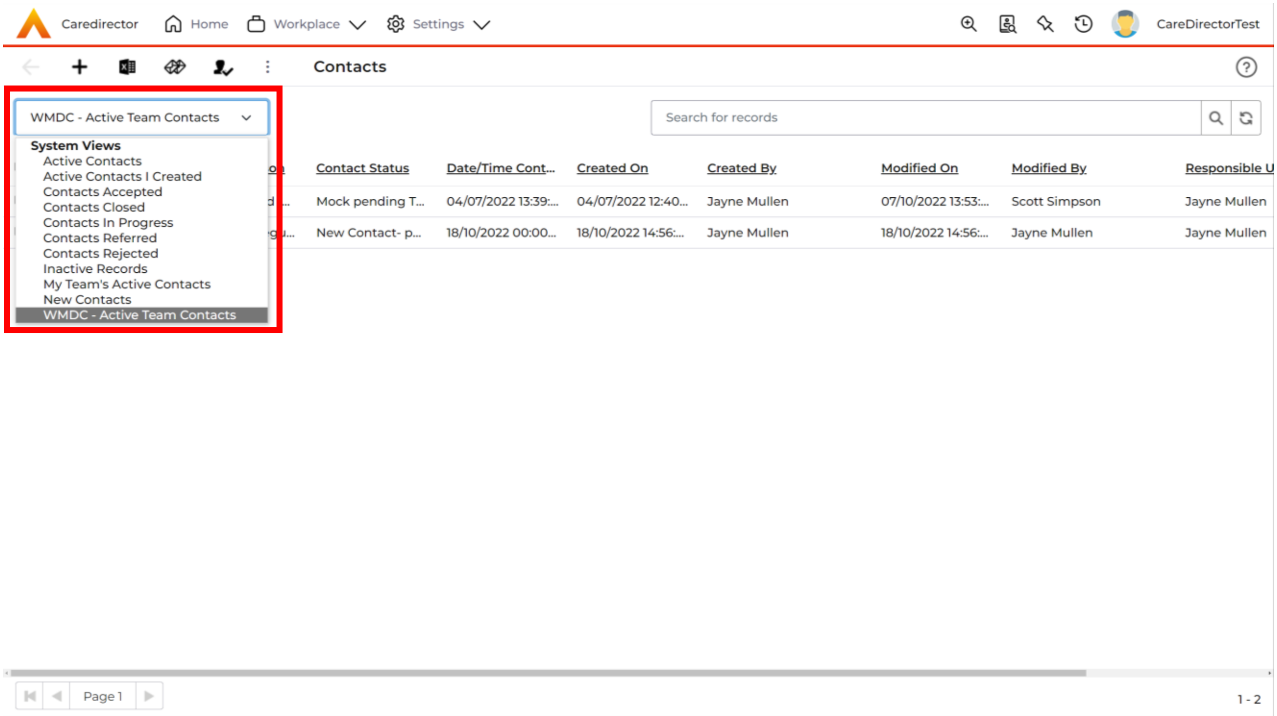
1. Most **Advanced Searches** are available through your **Dashboards**. However, situationally there may be a reason to use the **Advanced Search** button on the **Navigation Menu**. You are not able to build your own, you can only choose from pre-built **Saved** ones.

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.

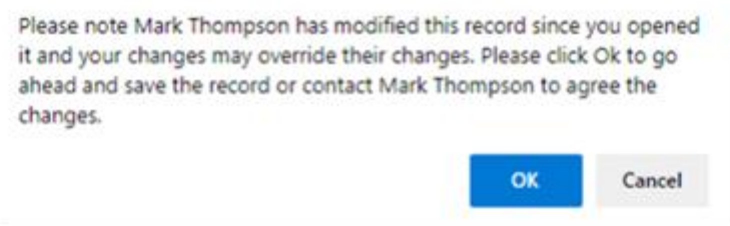
4. These **Advanced Searches** are found in **System Views/ Shared Views**.



5. Use the drop-down list found in **records** and **workplace** to filter through your data.

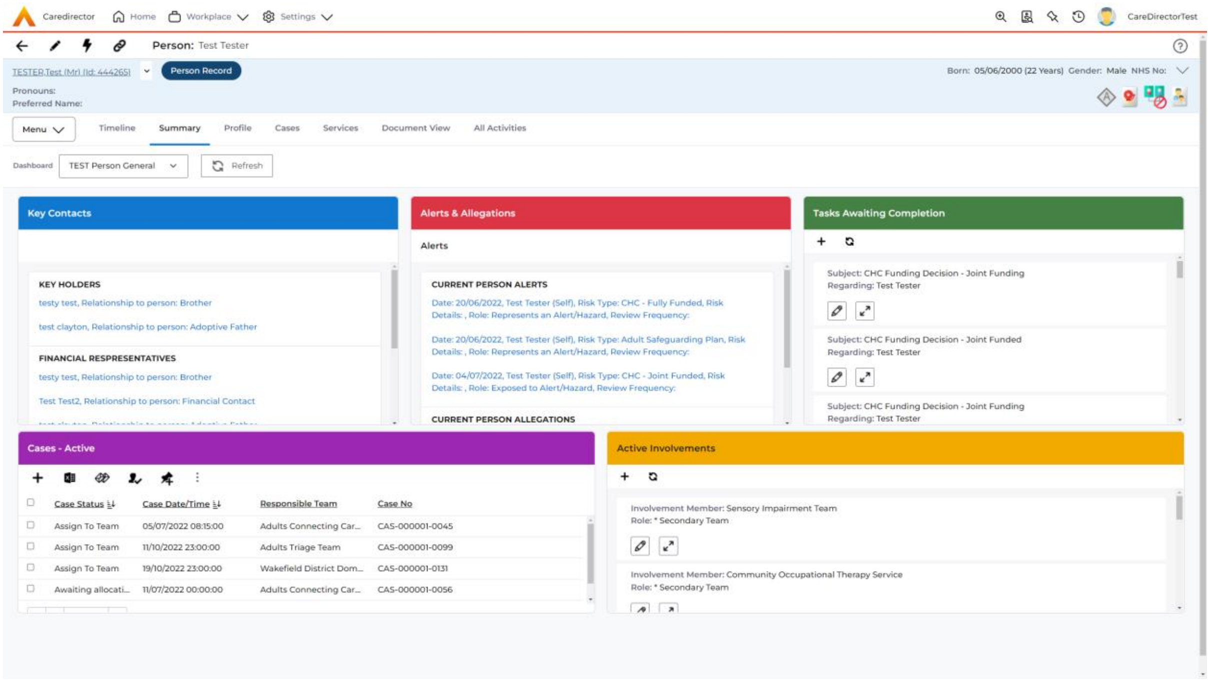
Modified Records

1. If a System User tries to save a record and another user has modified that same record (since it was opened) then an alert will be displayed. This will help prevent multiple system users from overwriting each other’s changes in the record.



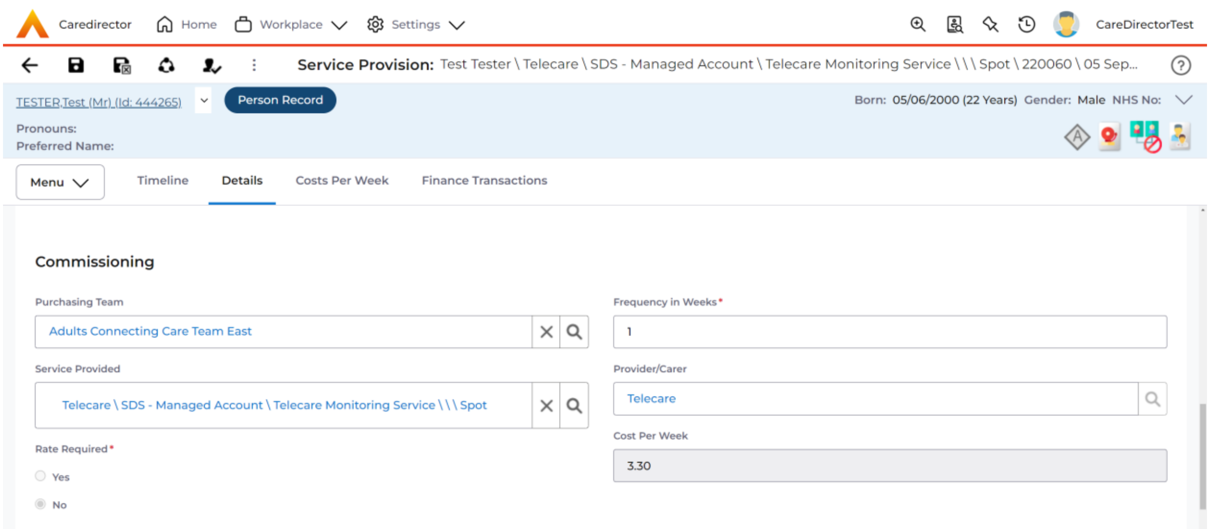
Client Summary Screens

1. **Client Summary Screens** are a useful way of having a quick overview of any service user.



Commissioning

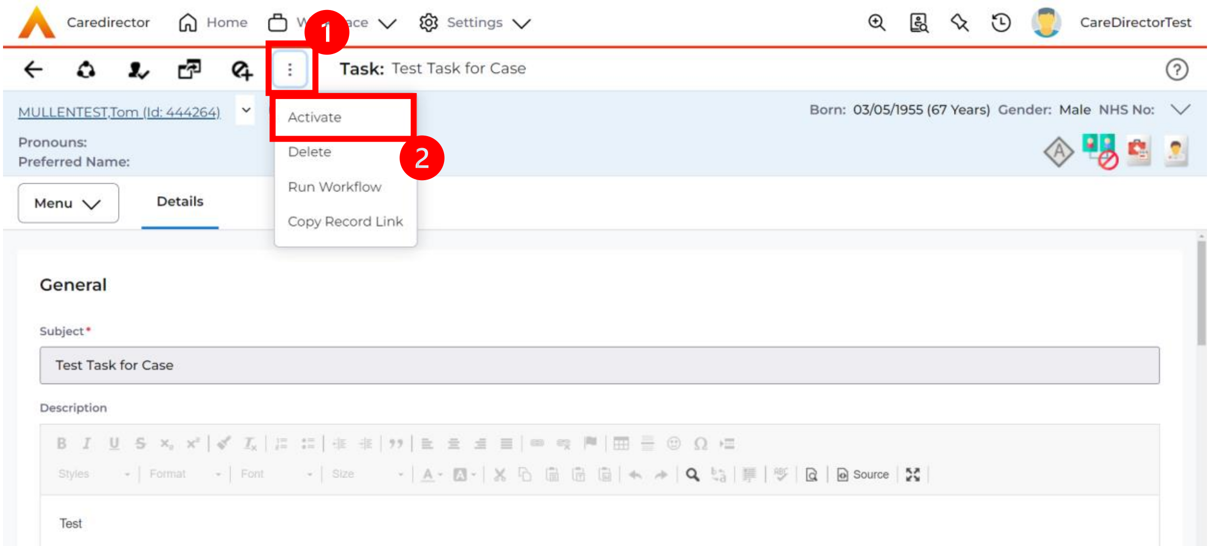
1. Commissioning instructs the System User of the current **Purchasing Team**, what service they are providing and who the **Provider/ Carer** is including the **Cost Per Week.**



Reactivating Activities

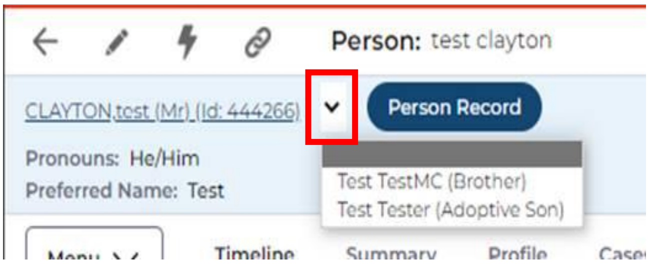
1. In CareDirector V5, a workflow was needed to change a **Status** of an **activity** from **Completed** back to **Open.** This was useful when information on the **activity** was missing, or something was forgotten before selecting **Completed**.

2. In CareDirector V6, there is no need for a workflow as the process is now a **toolbar** icon. When **activate** is selected, this will change the **Status** from **Completed** to **Open.** This will allow changes to be made, just remember to **Complete** the **activity** again and select **Save** from the **toolbar** once finished. Please note, all amendments to records will be viewable in audit.

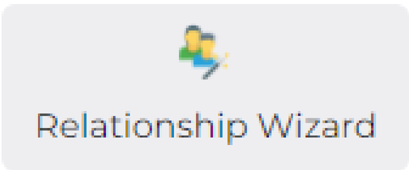


Relationships

1. The new feature is a drop-down arrow next to the **Person Record** hyperlink. This allows you to quickly see the relationships for the person.



2. Another feature is the Relationship Wizard, which enables you to see all the relationships in one place. Further optional filters can be applied that can you switch between household, non-household, whilst having a better comprehensive overview of all relationships.



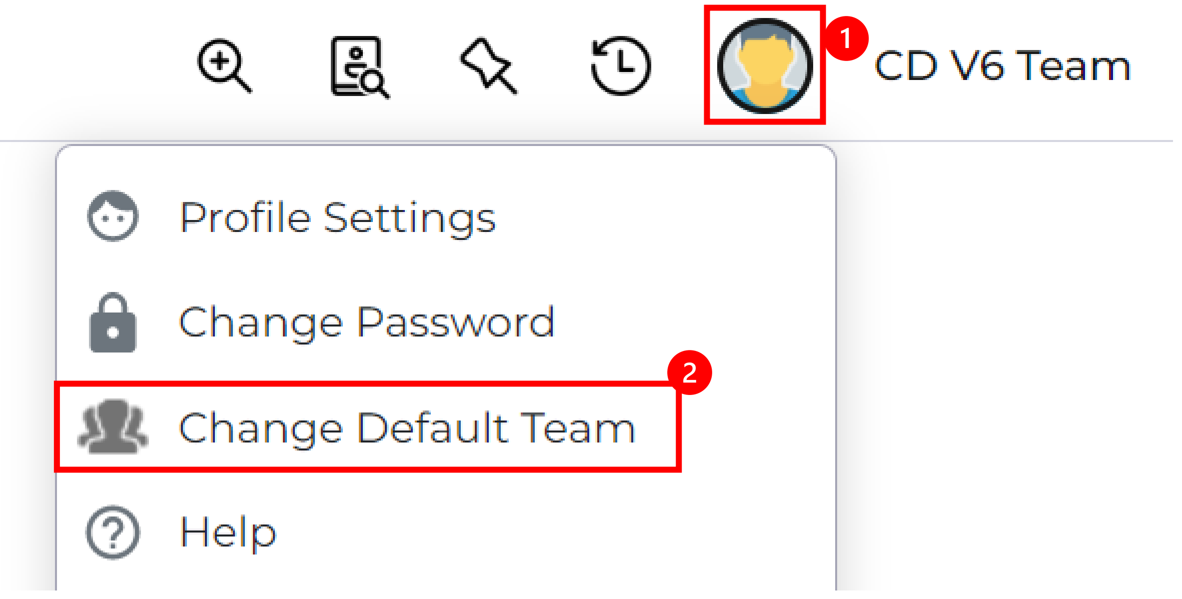
3. There is also a new display for relationships. In Version 5, you would list the people and what relation they are to Person A, however in Version 6 it lists what relation Person A is to them – it basically displays it the other way round.

Related Person	Relationship	Inside Household	Family Member
Courtney Test	Cousin	No	Yes
Sarah Test	Daughter	Yes	Yes
Jason Test	Step Daughter	Not Known	Yes
Joesph Test	Grand Daughter	Not Known	Yes
Jean Test	Grand Daughter	Not Known	Yes
Jack Test	Step Sister	No	Yes
Finn Test	Sister	No	Yes
Joanne Test	Niece	No	Yes
test billy	Mother		

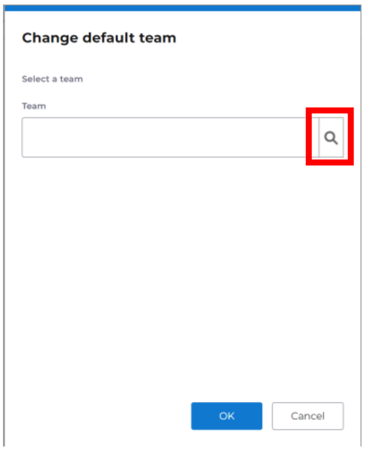
Record Ownership

1. You are assigned a **Responsible Team** known as **Default Team**. If you are **System User** who requires access to see another teams dashboard and workload. Then your dashboard should bring through that information automatically.

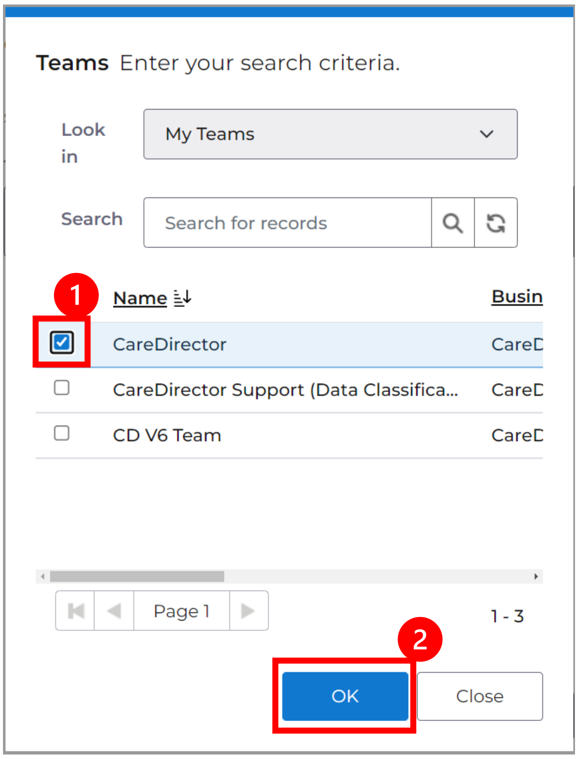
2. However, it may not. Therefore, you can manually switch your **Default Team** (listed at the top right) to the team you wish to view. Select **User Icon** and then **Change Default Team**.



3. When selected, a **Change Default Team** window will appear. Under the **Lookup** function to select the other available team.



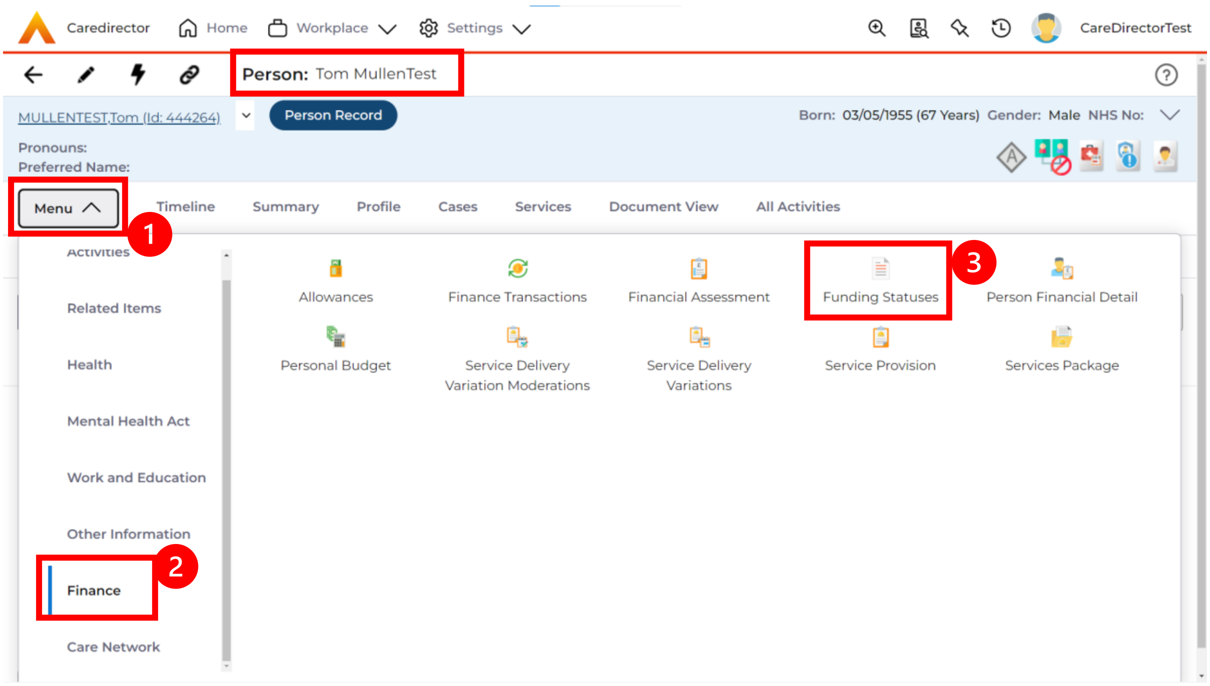
4. Then select the other team and press **OK**.



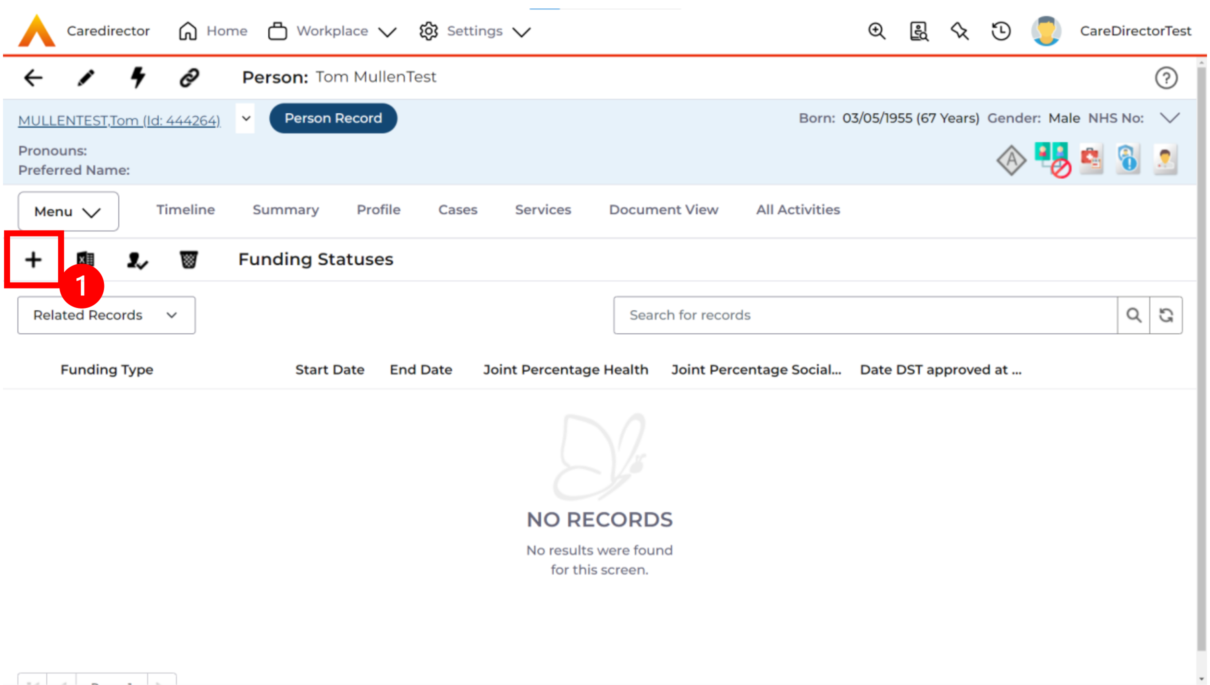
5. This when finished, should automatically change your dashboard/ module views to show anything allocated to that **Responsible Team** instead. However, if it does not. Please **log out** and **log back in**. If you have **Saved** your **username and password** then this should be a quick process. Please Note: If you have multiple tabs open of **CareDirector** it may not have switched **Team** on those so make sure you refresh your screen.

How to see CHC Funding Agreements

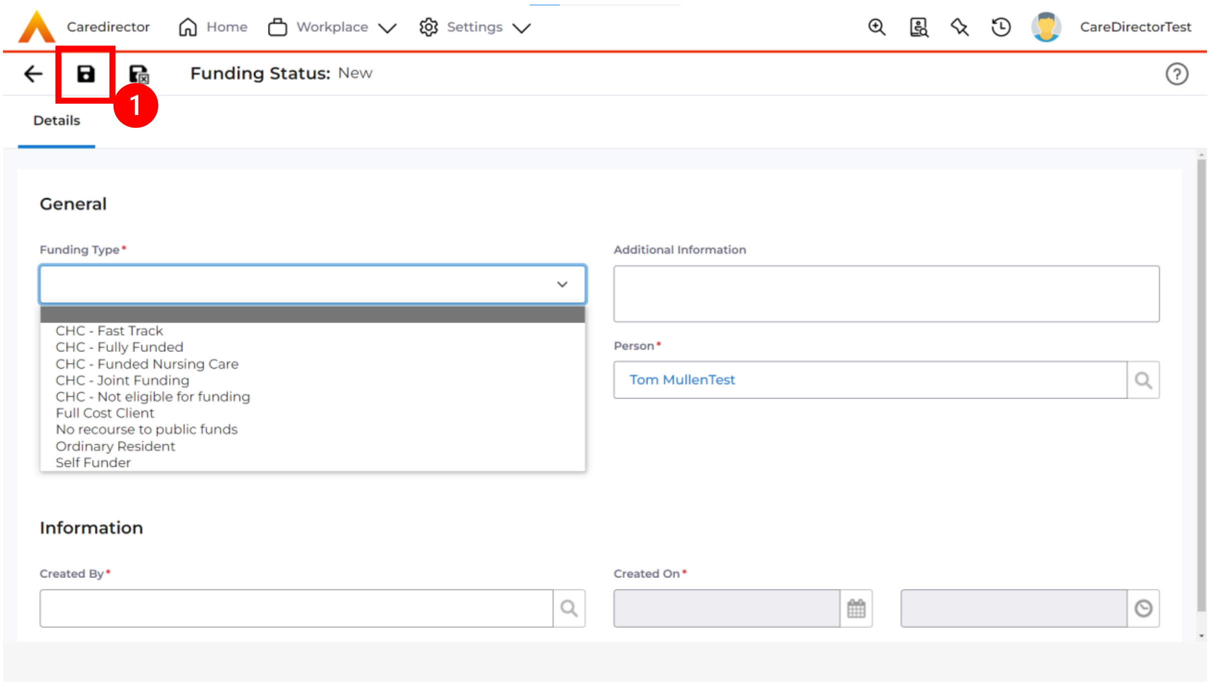
1. Locate the **Person Record** and open **Menu, Finance** and then **Funding Statuses.**



2. Then select **Create new Record** from the toolbar.



3. Within this screen, under **Funding Type** has the **CHC Funding Agreements**. When finished select **Save.**



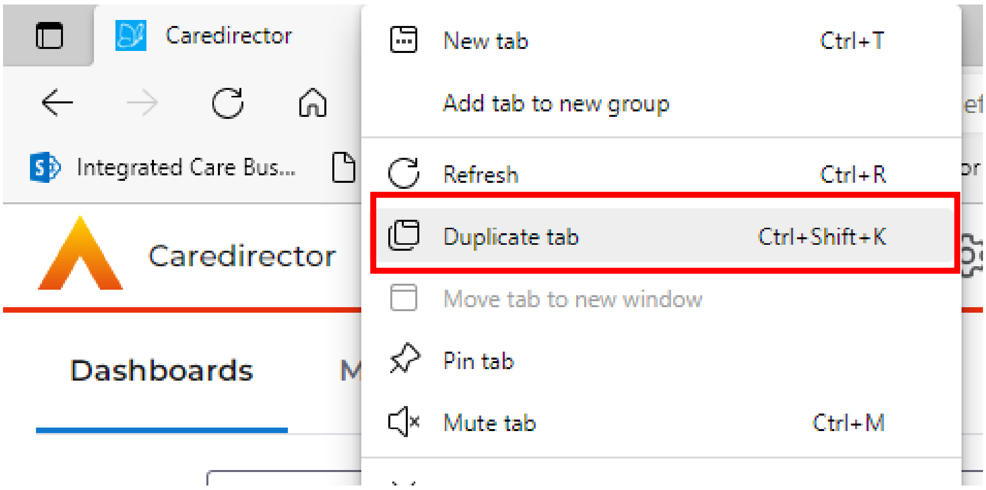
Working with Multiple Windows

1. CareDirector does not open multiple windows or tabs when navigating through the system.

2. There may be a situation that requires you to not lose what you are doing and go to another part of **CareDirector** to search for something else.

3. This requires you to generate a separate instance of **CareDirector**, one that will not affect what you want to work on later.

4. **Right-Click** the **Microsoft Edge** tab and select **Duplicate.**

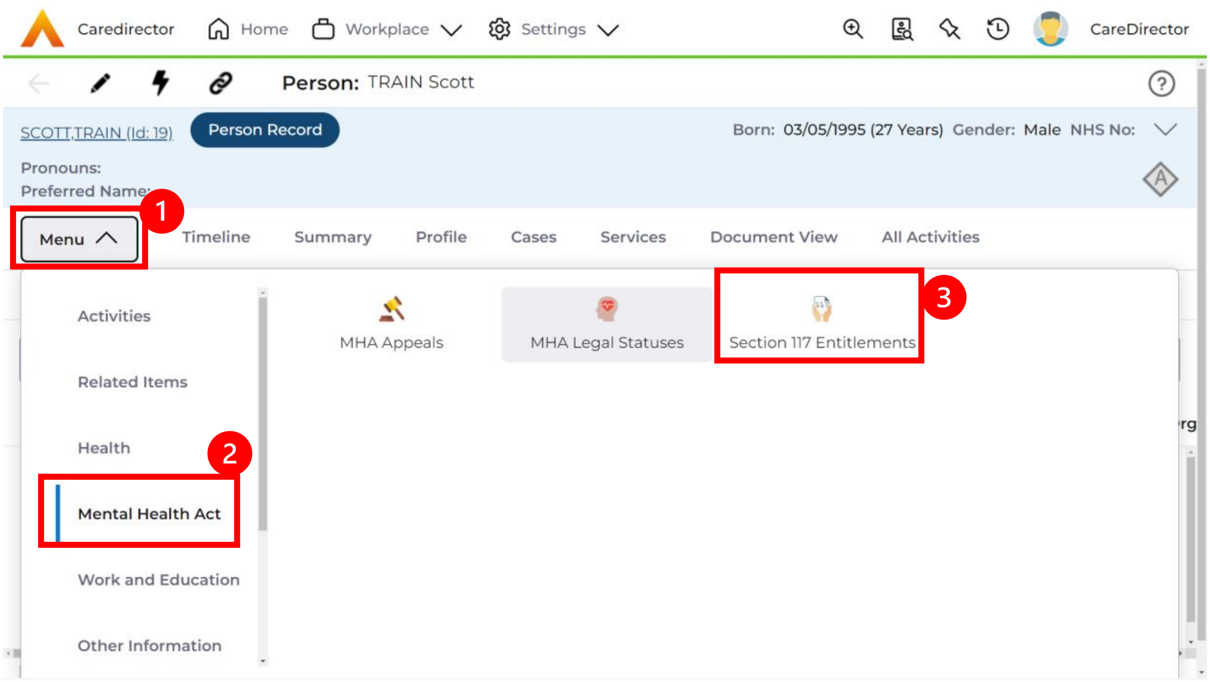


5. Or press **Ctrl+Shift+K** on your keyboard.

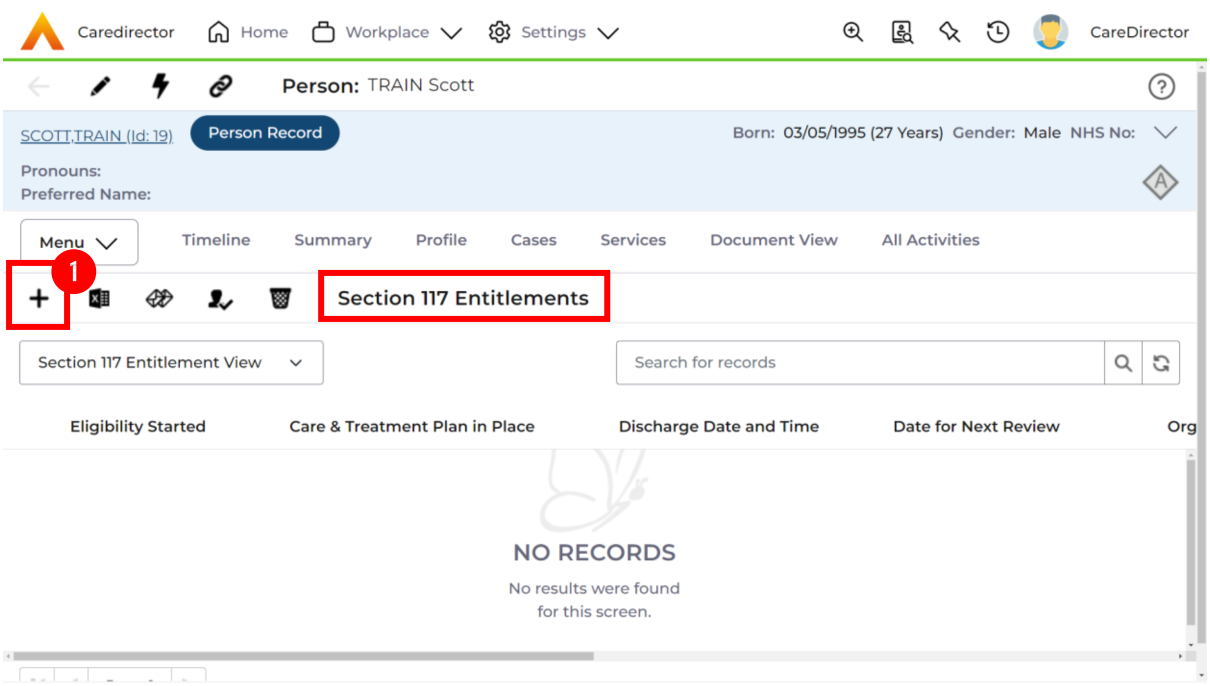
6. When selected, this will open a separate instance of CareDirector to work with for you to swap between.

How to find/add a Section 117 Entitlements

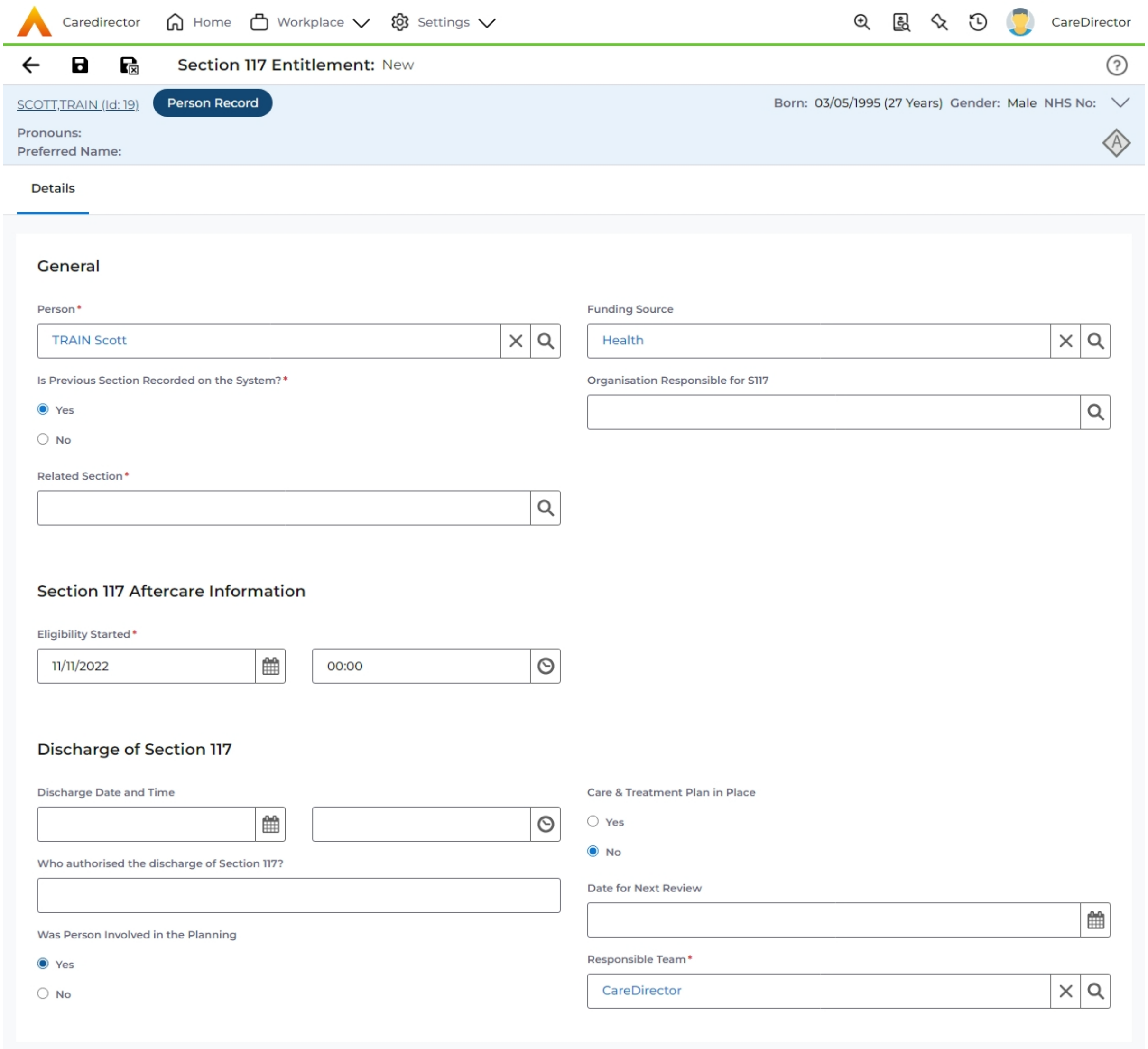
1. Locate the **Person Record**, select **Menu**, **Mental Health Act,** and then **Section 117 Entitlements**.



2. Then select **Create New Record** from the toolbar.



3. Fill in the relevant fields. When finished, select **Save**.
   Please note please do not fill in **Organisation Responsible for S117**.



Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	14/10/2022