



Reablement Team V1.0

Document	CareDirector Reablement Team
Purpose	Reablement's daily tasks on CareDirector.
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Owner	ICT Business Transformation Team
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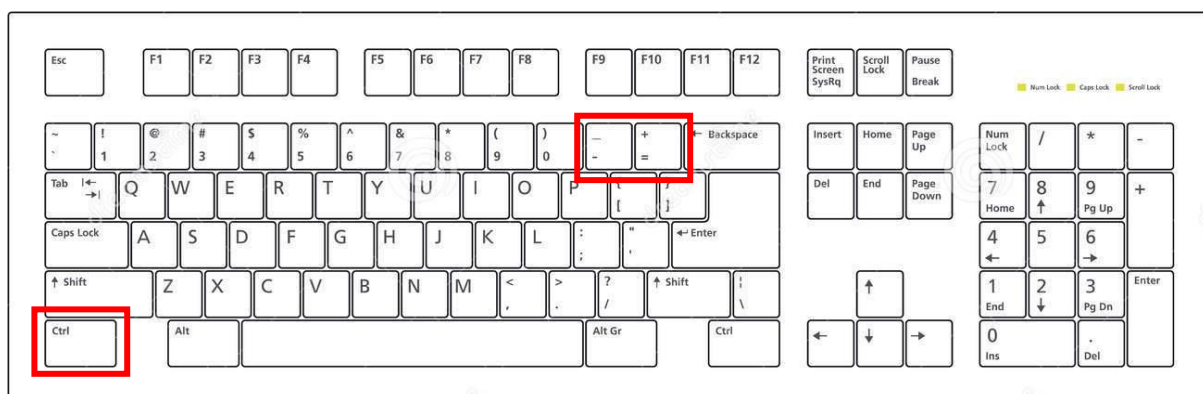
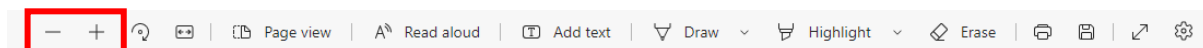
Guide Information

Before Live Access...

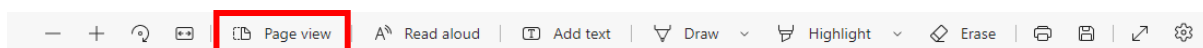
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

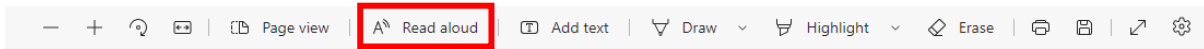
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



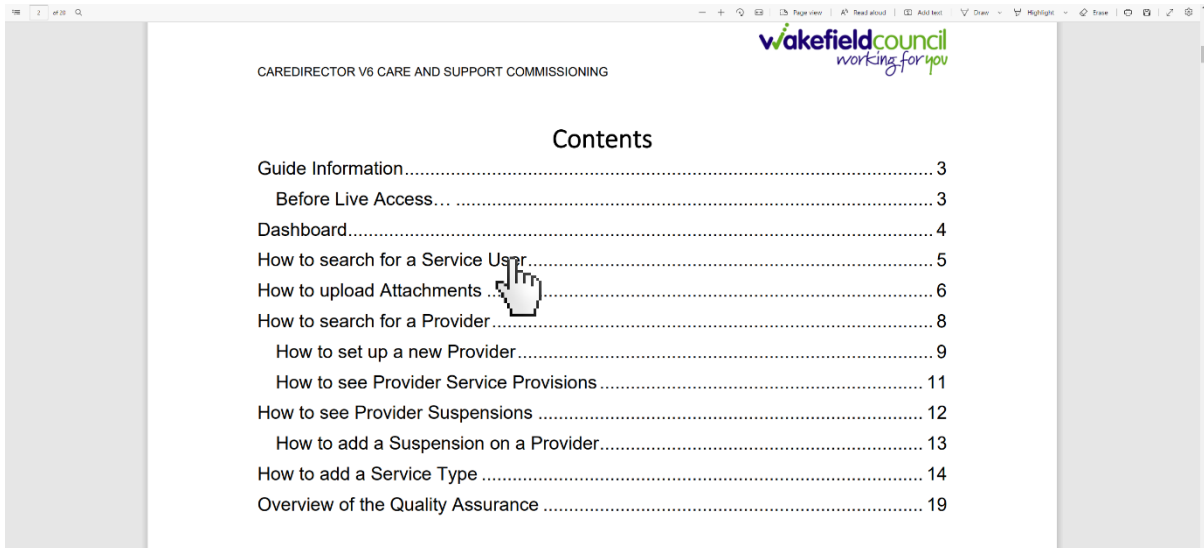
3. To put pages next to one another, select the **Page View** icon on the toolbar.



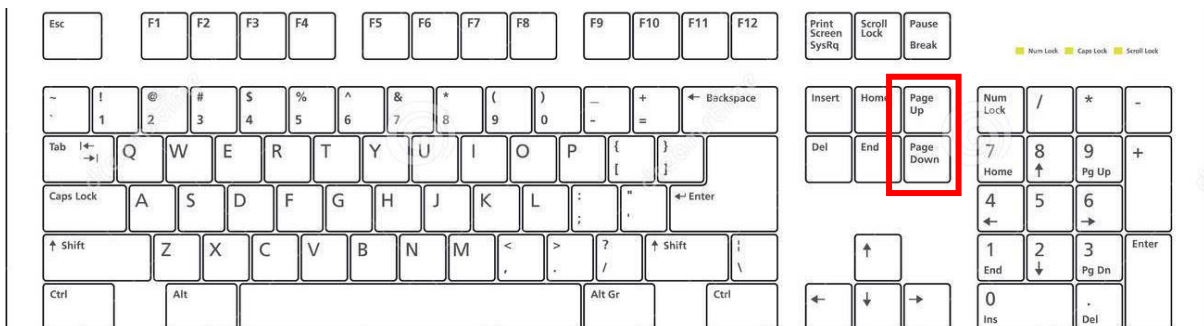
4. For auditory assistance, select **Read Aloud** from the toolbar.



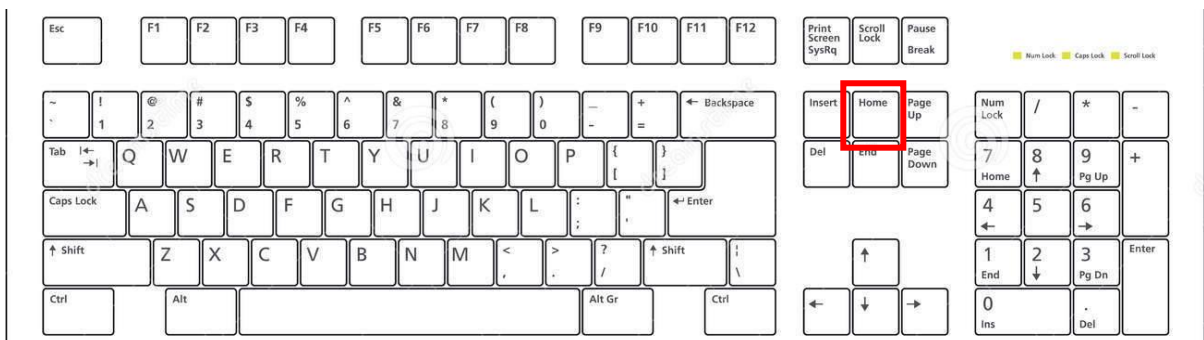
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

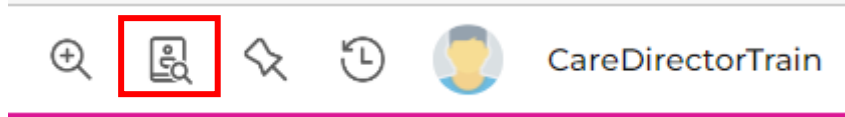


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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 toolbar at the top contains several icons, with the pencil icon (representing 'Edit') highlighted by a red box and a red circle with the number '1'. Below the toolbar, the page header shows 'Person Record' and 'Person: TEST Tom'. The main content area displays a timeline of activities:

- OCT 2022**
 - Form (Case) Created** (Yesterday at 15:05): A new record of form (case) was created by Scott Simpson. Details: Due Date, Form Type: AMHP Report Form, Status: In Progress.
 - Service Provision Created** (Yesterday at 10:12): A new record of service provision was created by Scott Simpson. Details: Actual Start Date, Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot, Status: Draft.
- SEP 2022**
 - Task Created** (28/09/2022 13:58:47): A new record of task was created by Scott Simpson.

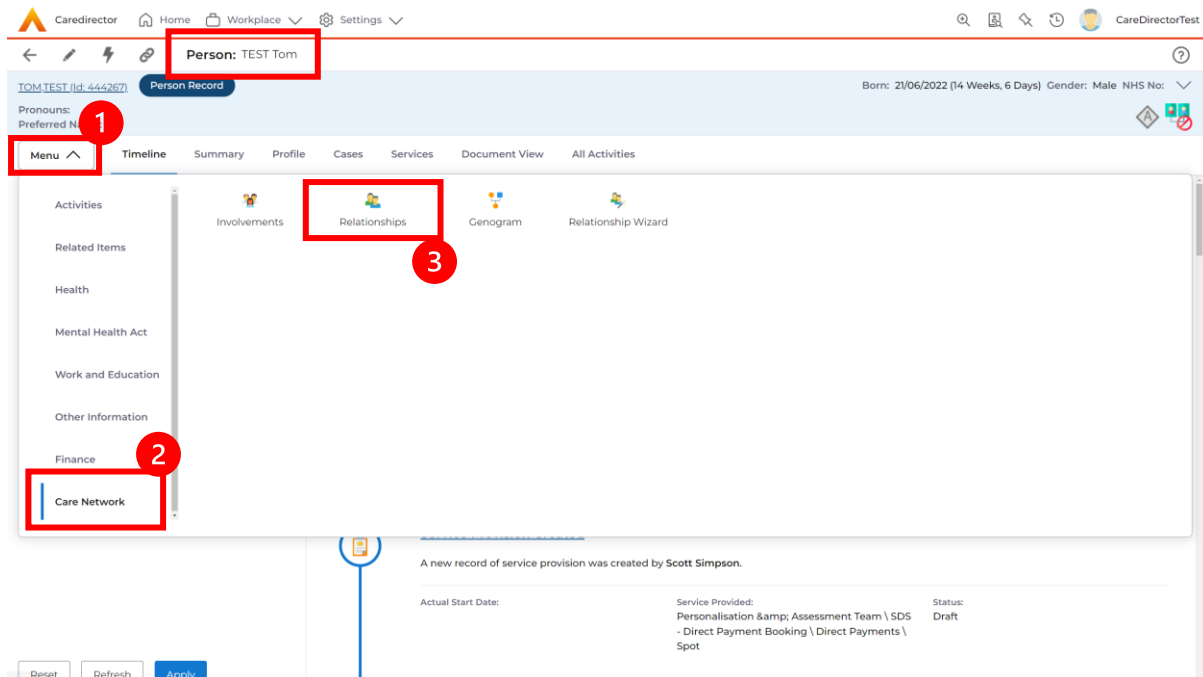
2. This will open the **Person Creation Screen**. Scroll down and edit the details required. When finished, select **Save and Return to Previous Page**.

The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. The toolbar at the top contains several icons, with the 'Save' icon (represented by a floppy disk) highlighted by a red box and a red circle with the number '1'. Below the toolbar, the page header shows 'Person: TEST Tom'. The main content area displays the 'Personal Details' form with the following fields:

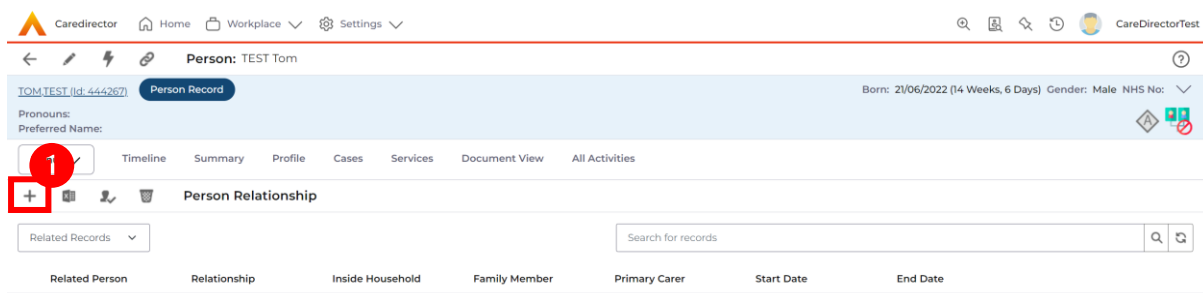
- Id***: 444267
- Title**: (Empty)
- First Name**: TEST
- Middle Name**: (Empty)
- Last Name***: Tom
- Stated Gender***: Male
- Profile Picture**: (Image placeholder)
- NHS No.**: (Empty)
- Reason for no NHS No.**: (Empty)
- Ethnicity***: White British
- Marital Status**: Divorced

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.

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

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**.

How to search for a Case

1. Open the **Person Record** the **Case** is linked too. Then select the **Cases** tab to find the current **Case**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number '1'. Below this, the 'Person 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 created by Scott Simpson. The 'Form (Case) Created' entry shows a due date and form type of 'AMHP Report Form' with a status of 'In Progress'. The 'Service Provision Created' entry shows an actual start date and service provided: 'Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot' with a status of '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 red circle containing the number '1'. 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', 'Case Status', and 'Created By'. The first two rows are highlighted with a red box and a red circle containing the number '2'.

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

How to create a Case

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

Person: Tom MullenTest

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [redacted]

Pronouns: Preferred Name: [redacted]

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

+ [redacted] Cases

Related Records [redacted] Search for records [redacted]

<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**.

Case: New

MULLENTTEST, Tom (Id: 444264) Person Record Born: 03/05/1955 (67 Years) Gender: Male NHS No: [redacted]

Pronouns: Preferred Name: [redacted]

Details

Contact Details

Case No * [redacted]

Person * Tom MullenTest [redacted]

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

Initial Contact [redacted]

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

Contact Received By * Scott Simpson [redacted]

Contact Reason * A - Adult Safeguarding [redacted]

Presenting Priority [redacted]

Additional Information [redacted]

Referral Reason [redacted]

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**.

The screenshot shows the 'Person Record' page for TOM.TEST (Id: 444267). The 'Cases' tab is highlighted with a red box and a circled '1'. Below the tabs, there is a search bar and a table of cases.

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.**

The screenshot shows the 'Case Record' page for Tom, TEST - (21/06/2022) [CAS-000001-0087]. The 'Details' tab is highlighted with a red box and a circled '1'. The 'Assignment Information' section is highlighted with a red box and a circled '2', showing the 'Case Status' dropdown menu set to 'Assign To Team'.

Assignment Information

Case Status *
Assign To Team

Case Priority
[Empty field]

Responsible User
[Empty field]

Responsible Team *
AMHP Coordinator

Review Date
[Empty field]

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**.

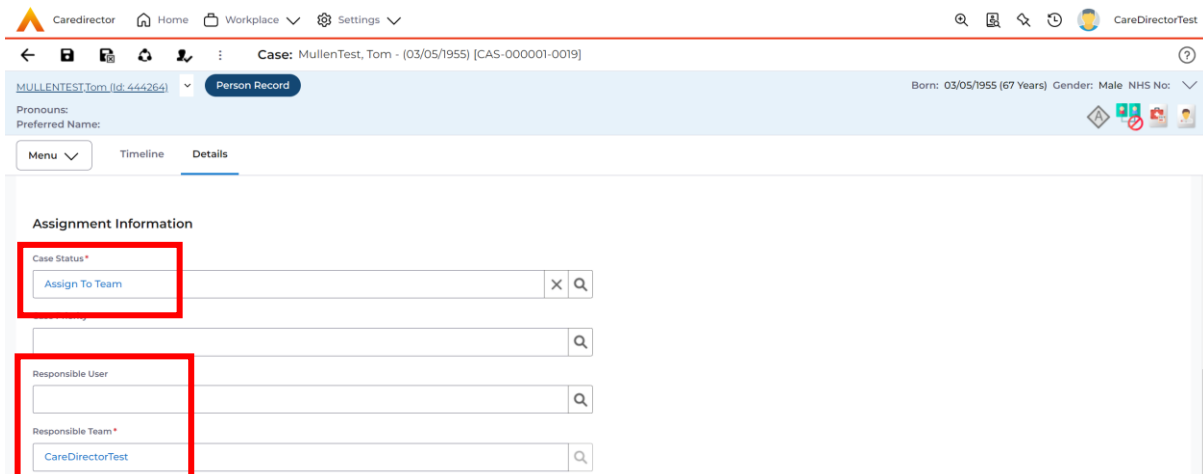
The screenshot shows the 'Case Statuses' lookup dialog box. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The 'Search' field contains 'Search for records'. A table lists the following options:

<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...		

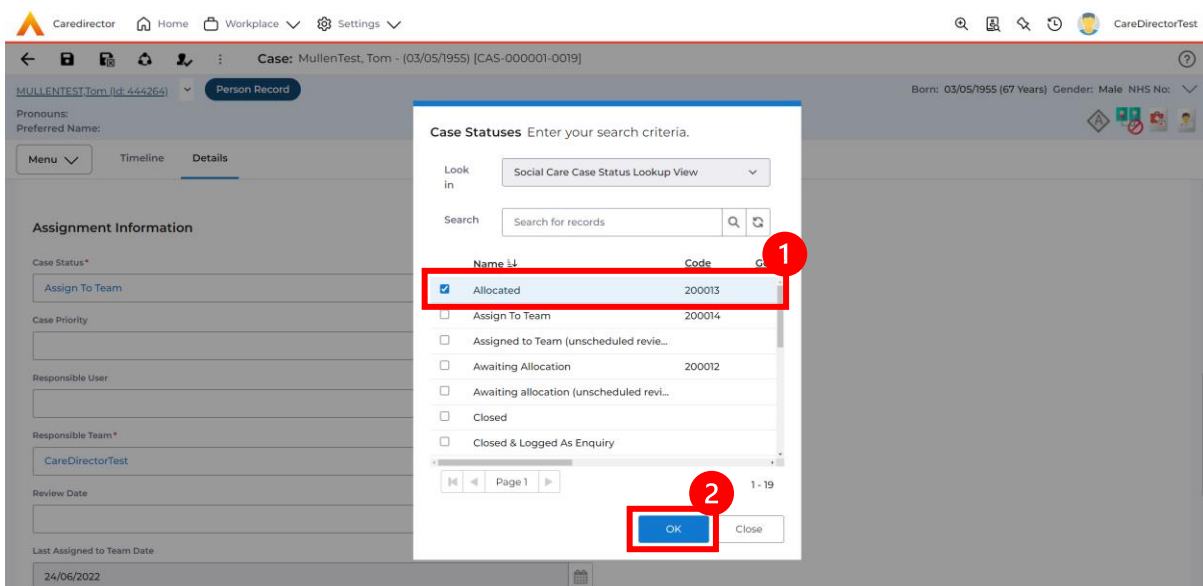
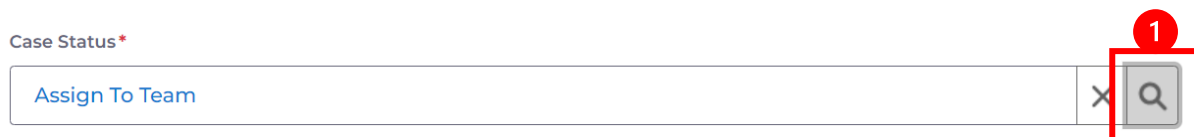
The 'OK' button is highlighted with a red box and a '2' callout. The 'Details' tab in the background is also highlighted with a red box and a '1' callout.

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 'System Users' dialog box with the following elements:

- 1**: Search criteria input field.
- 2**: List of system users including 'My Business Unit Users', 'Active Managers', 'Deactivated Users', 'Lookup View', 'My Business Unit Users', 'My Default Team', and 'My Record'.
- 3**: 'OK' button.

- 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 'Assignment Information' section with the following fields:

- Case Status*: Allocated
- Case Priority:
- Responsible User*: Scott Simpson
- Responsible Team*: CareDirectorTest
- Review Date:

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. The 'Assignment Information' section contains the following fields:

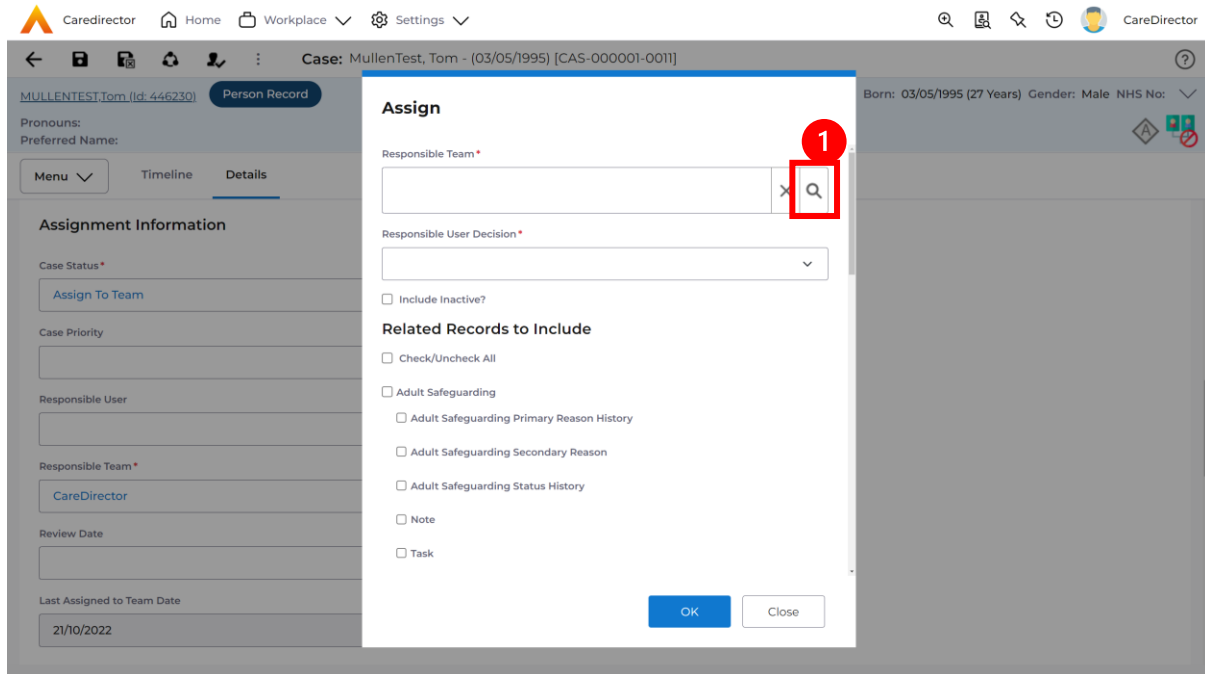
- Case Status ***: A dropdown menu with 'Assign To Team' selected. A red box and a '1' in a red circle highlight the search icon on the right of this field.
- Case Priority**: An empty text input field with a search icon on the right.
- Responsible User**: A text input field containing 'Scott Simpson'.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

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.

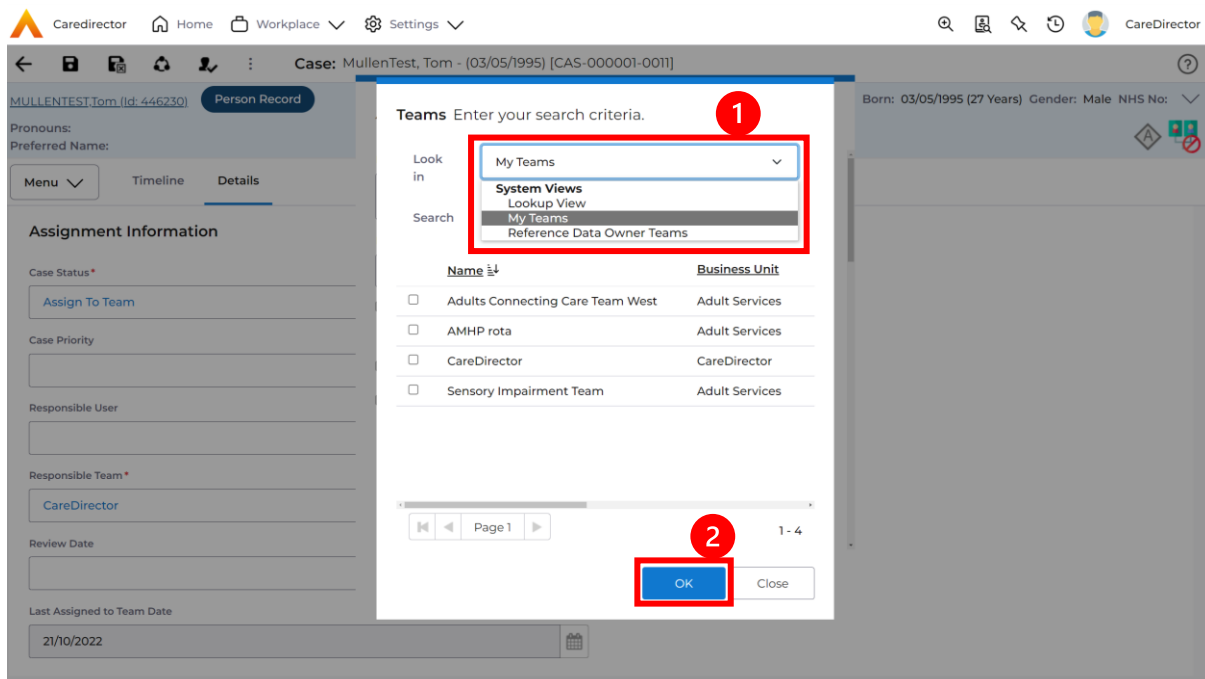
The screenshot shows the CareDirector interface for the same case. The 'Assignment Information' section contains the following fields:

- Case Status ***: A dropdown menu with 'Assign To Team' selected. A red box and a '1' in a red circle highlight the search icon on the right of this field.
- Case Priority**: An empty text input field with a search icon on the right.
- Responsible User**: An empty text input field with a search icon on the right. A red box and a '2' in a red circle highlight this field.
- Responsible Team ***: A dropdown menu with 'CareDirector' selected.
- Review Date**: A date picker icon.

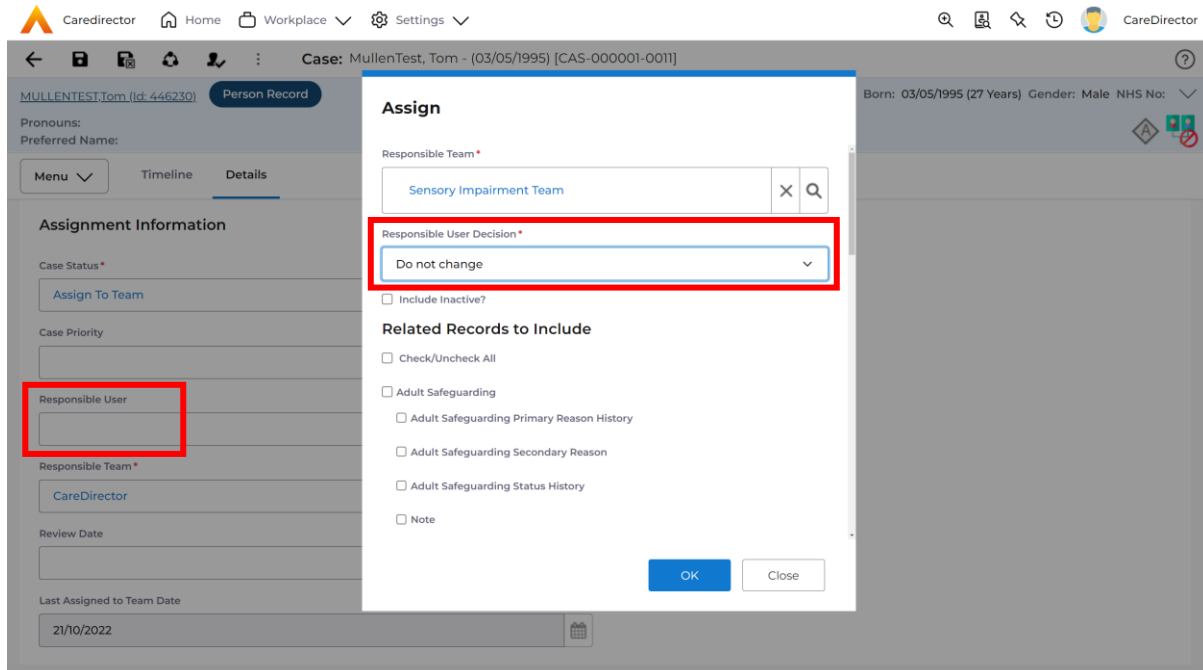
- This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup** function.



- 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**.



- 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.

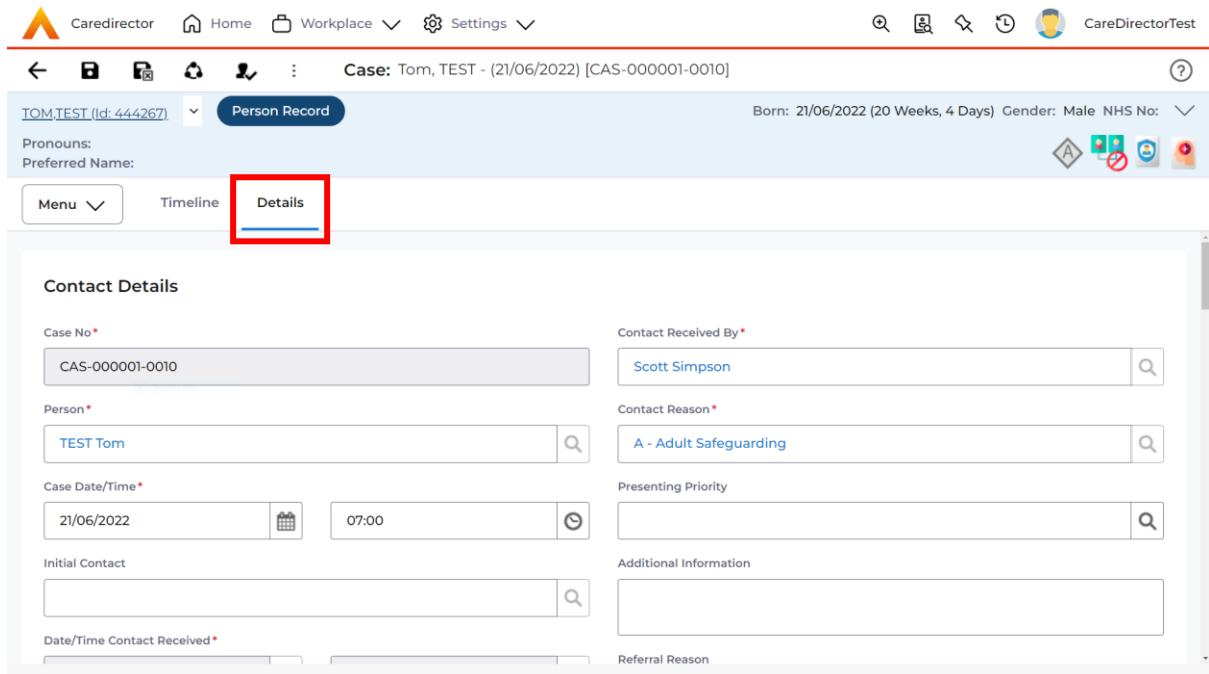
<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...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

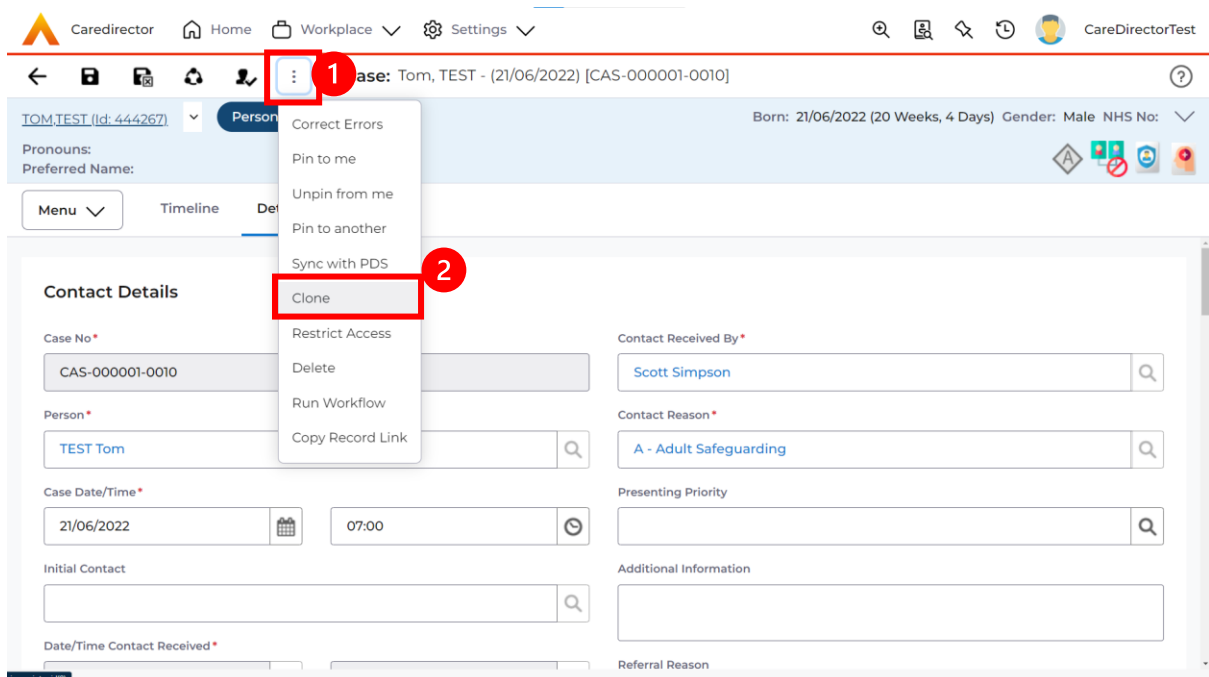
The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a '2' in a red circle, indicating that the user should select 'Secondary Worker'. The 'Start Date' field is highlighted with a red box and a '1' in a red circle, indicating that the user should enter the start date. The 'Involvement Member' field shows 'Peter King' as the selected user. Other fields include 'Case', 'Responsible Team', 'Person', 'Involvement Priority', 'Involvement Status', 'End Date', 'Involvement End Reason', and 'Involvement Review Date'. The 'Description' field is also present at the bottom of the form.

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:

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

Clear Filters **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'. 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').

The screenshot also shows a toolbar with a '+' icon highlighted with a red box and a '1'. Below the toolbar, there's a search bar for records and a table of related 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 user's profile information at the top indicates they are logged in as 'CareDirectorTest'.

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**.

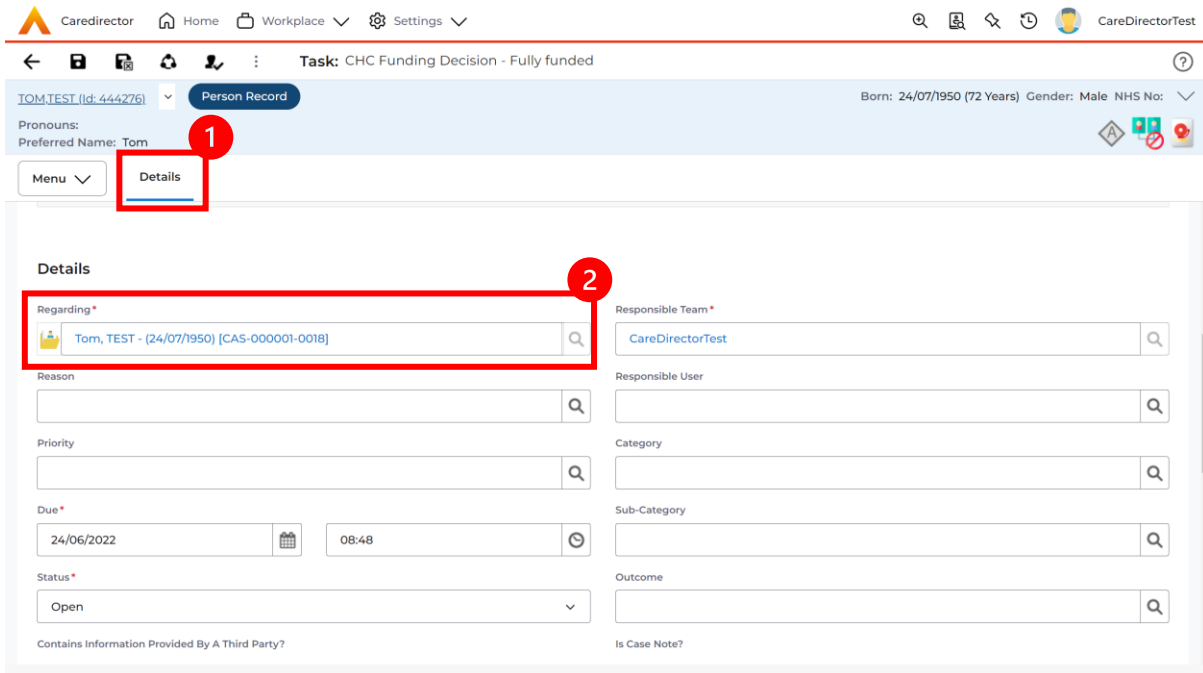
The screenshot shows the CareDirector interface. At the top, there are navigation links: Caredirector, Home, Workplace, and Settings. The main header shows the user 'CareDirectorTest'. Below the header, there is a toolbar with icons for back, refresh, print, and a menu icon. The main content area shows a form for 'MullenTest, Tom - (03/05/1955)'. 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. The 'Status' dropdown menu is open, showing options: Complete, Not Started, In Progress, Closed, Cancelled, and Approved. The 'Complete' option is highlighted. A red box highlights the dropdown menu, and 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.

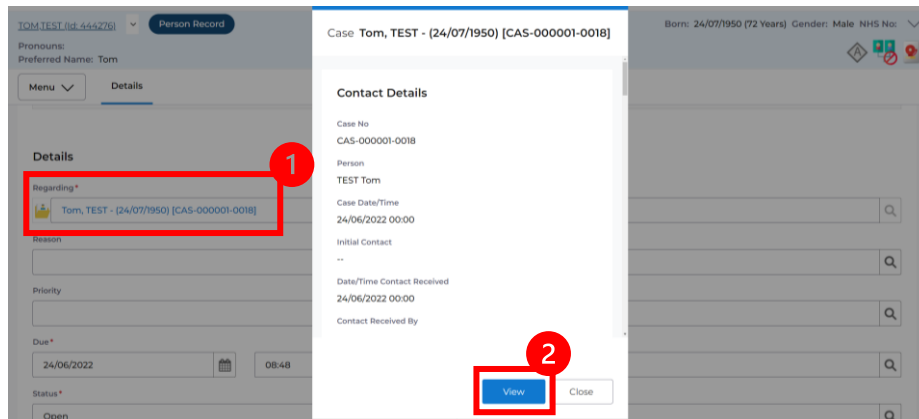
The screenshot shows the CareDirector interface. At the top, there are navigation links: Caredirector, Home, Workplace, and Settings. The main header shows the user 'CareDirectorTest'. Below the header, there is a toolbar with icons for back, refresh, print, and a menu icon. The main content area shows a task for 'MULLENTTEST, Tom (Id: 444264)'. The task has a subject 'Test Task for Case' and a description 'Test'. The 'Activate' option is selected in the dropdown menu. A red box highlights the 'Activate' option, and a red circle with the number '2' is next to it.

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 dialog box open. The dialog box has three red circles: 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 list of teams is as follows:

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' with a red '2' over the button. The user's details are: Born: 03/05/1995 (27 Years), Gender: Male, NHS No: [redacted]. The 'Details' section contains several fields: 'Regarding*' (MullenTest, Tom - (03/05/1995) [CAS-000001-001]), 'Responsible Team*' (Sensory Impairment Team), 'Reason', 'Responsible User' (Scott Simpson, with a red '1' and a red box around the 'X' icon), 'Priority', 'Category', 'Due*' (with a calendar icon), 'Sub-Category', 'Status*' (Open), and 'Outcome'. At the bottom, there are two radio button options: 'Contains Information Provided By A Third Party?' (Yes/No) and 'Is Case Note?' (Yes/No).

How to Allocate an existing Activity to another team

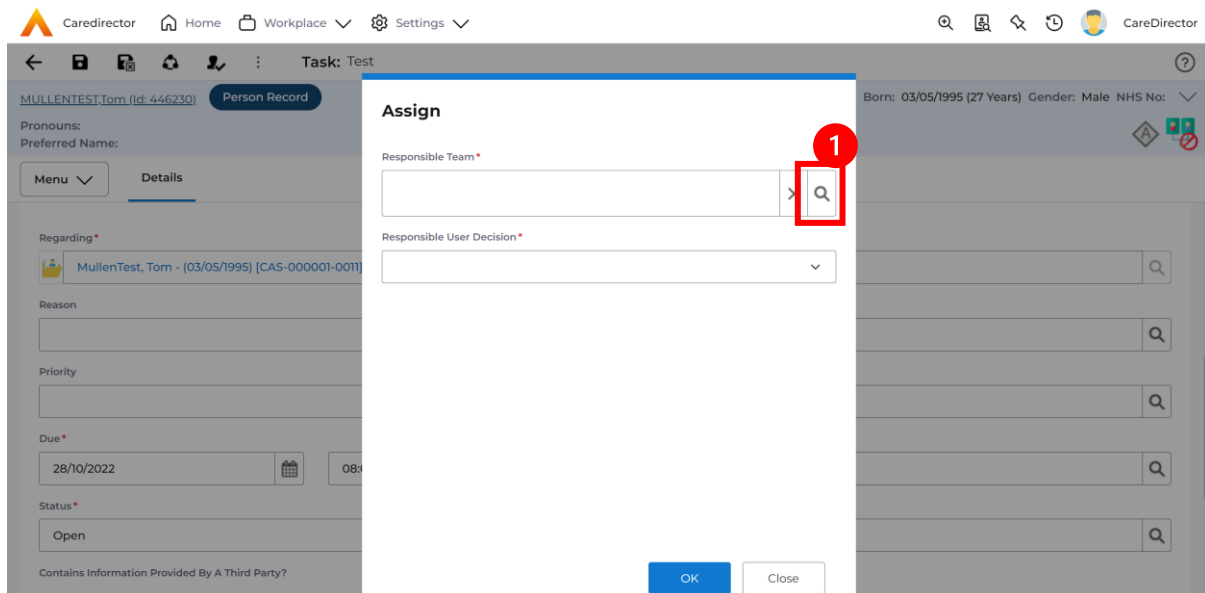
1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User**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

The screenshot shows the CareDirector interface for a task record. The task is titled 'Task: Test' and is associated with 'MULLENTEST, Tom (Id: 446230)'. The 'Responsible Team' is 'Sensory Impairment Team' and the 'Responsible User' is 'Scott Simpson'. A red box highlights the 'X' button next to the user name, with a red circle containing the number '1' next to it. Other fields include 'Reason', 'Priority', 'Due' (28/10/2022), 'Status' (Open), and 'Outcome'.

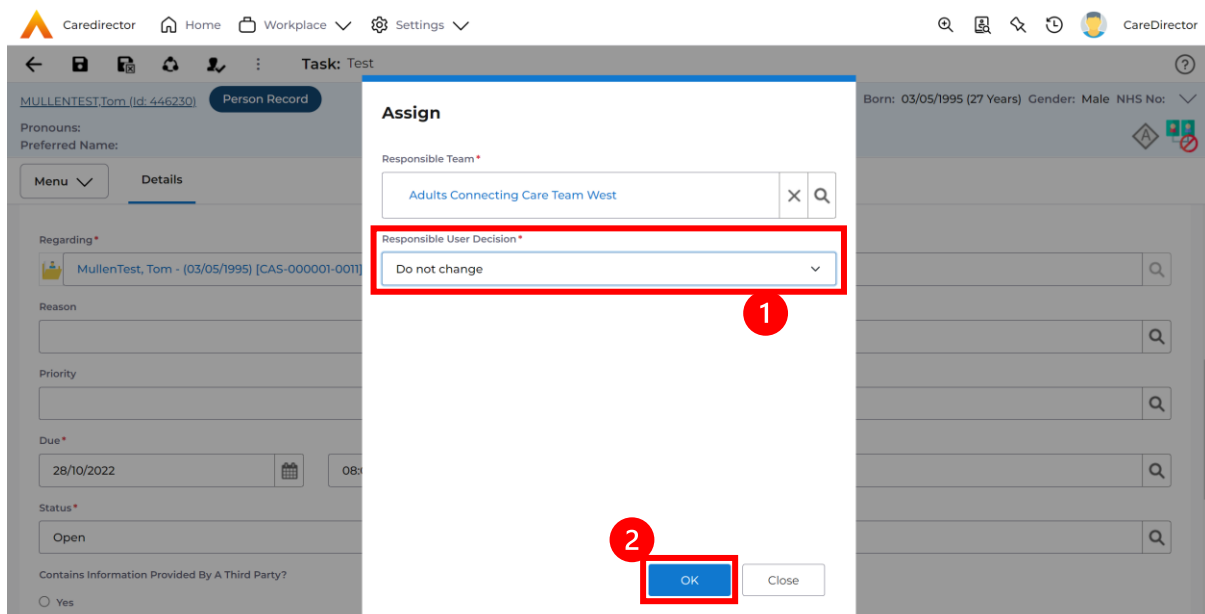
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the same CareDirector interface as above, but with the 'Assign' button in the toolbar highlighted by a red box and a red circle containing the number '1'. The 'Responsible User' field is now empty, indicating that the user has been removed or is about to be reassigned.

- 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.



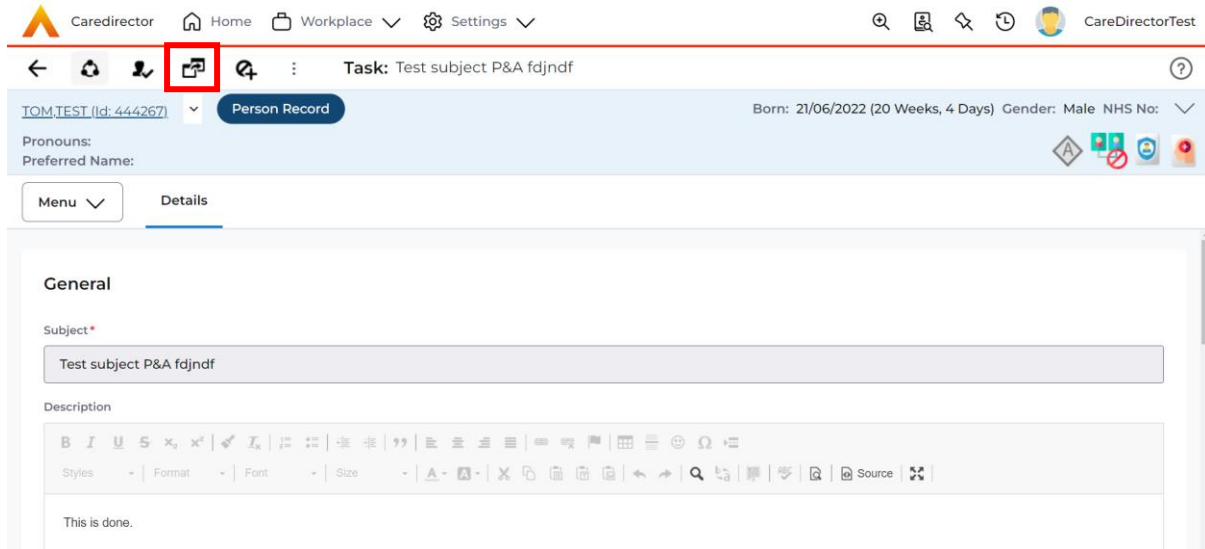
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



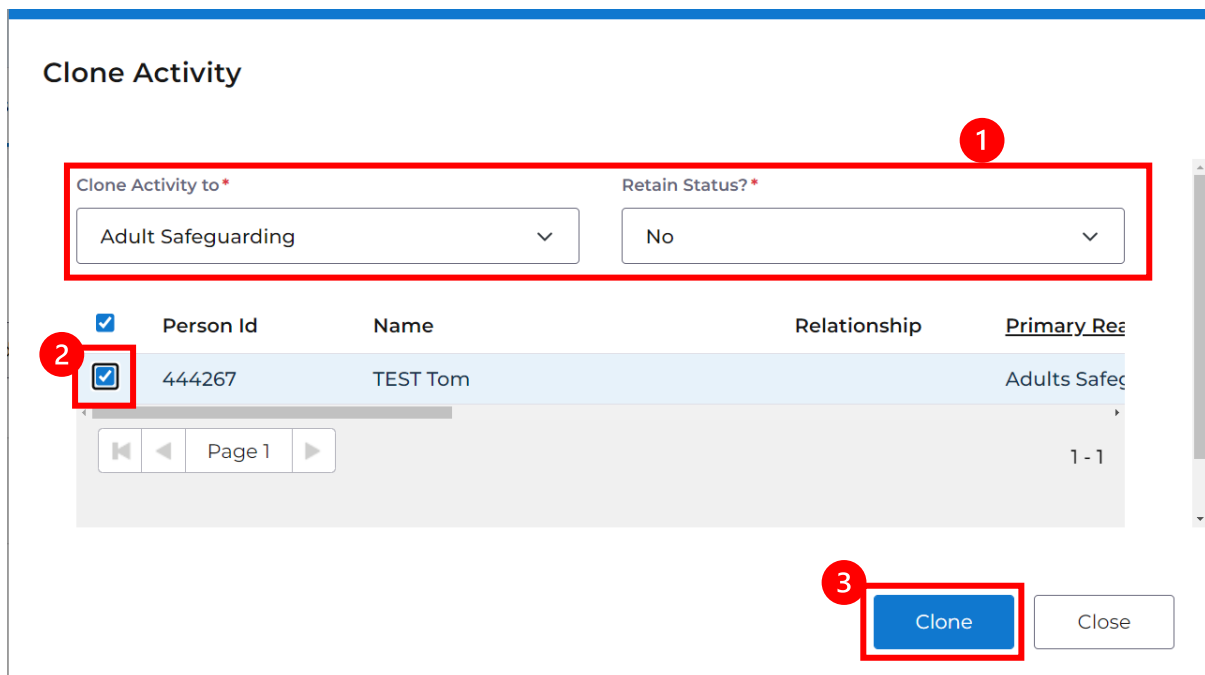
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

How to Clone Activities

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

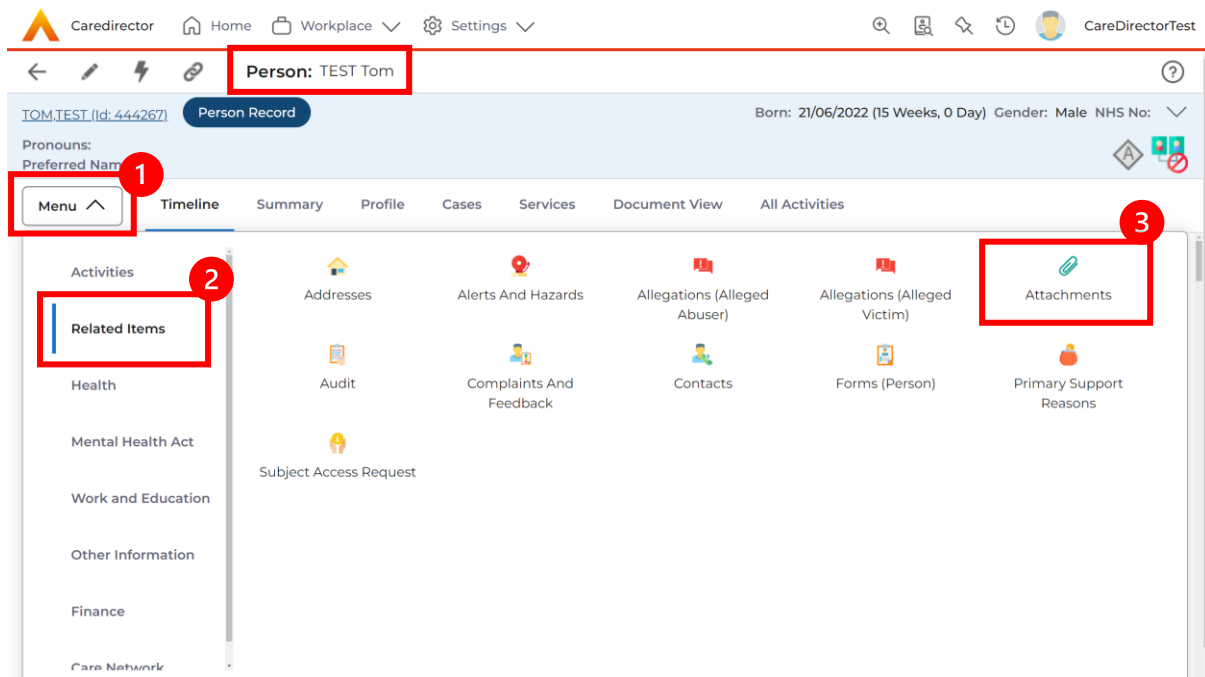


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

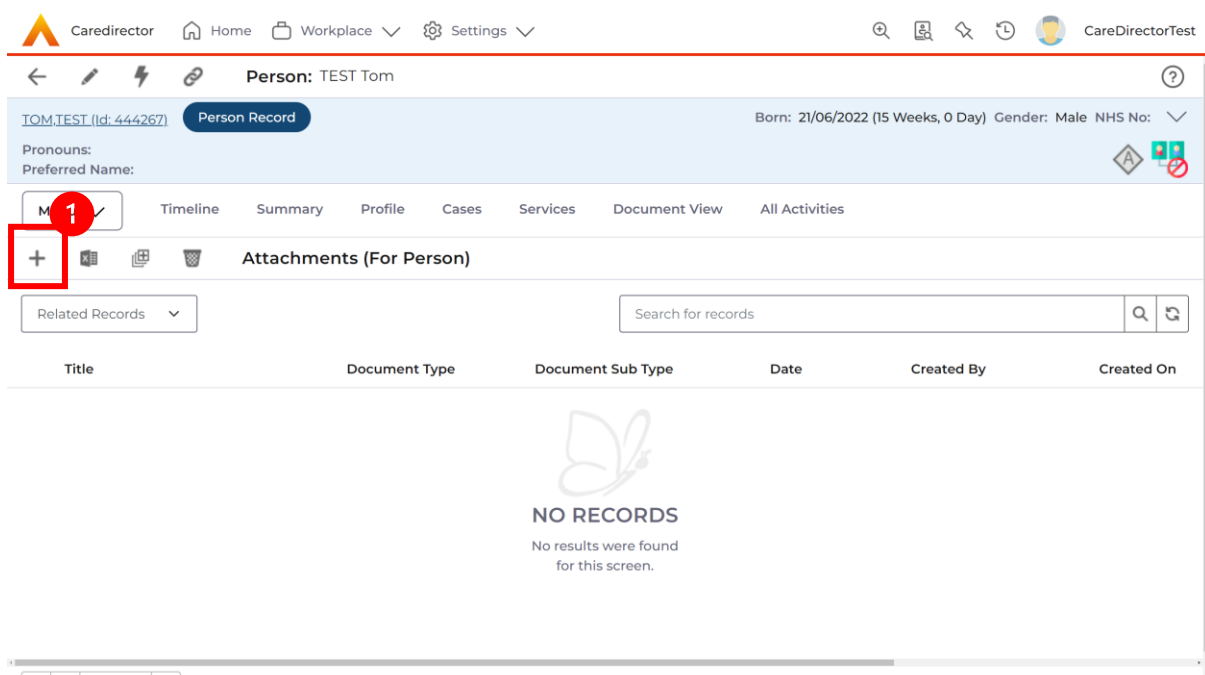


How to upload Attachments

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**.



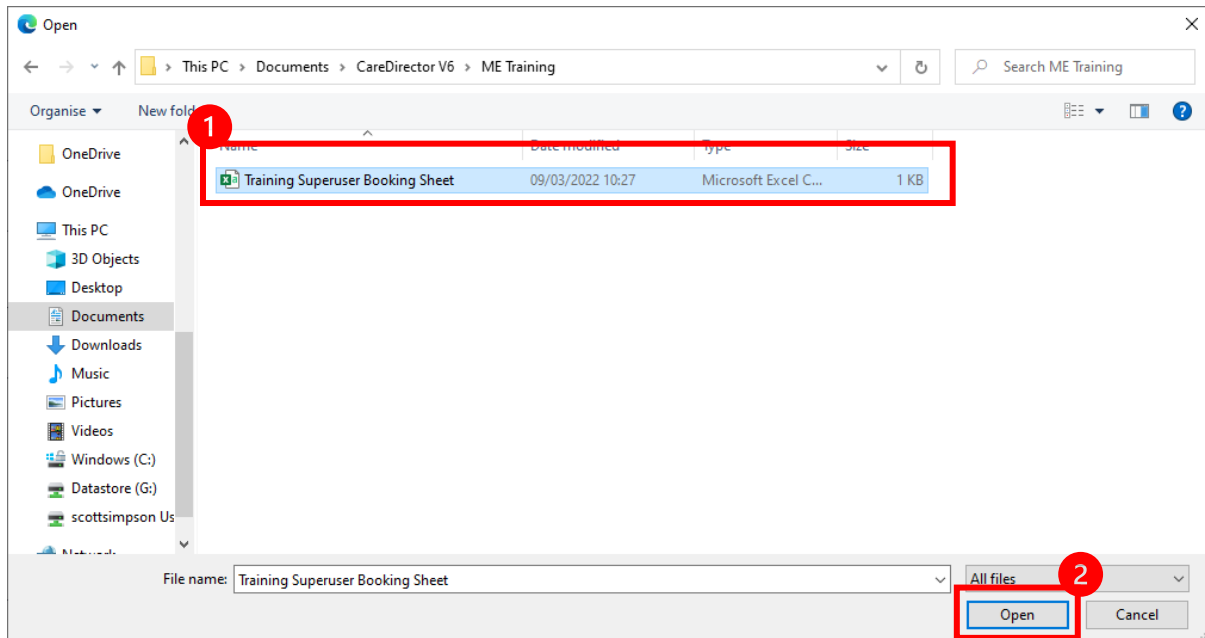
2. When opened, select the **Create New Record** from the toolbar.



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

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).

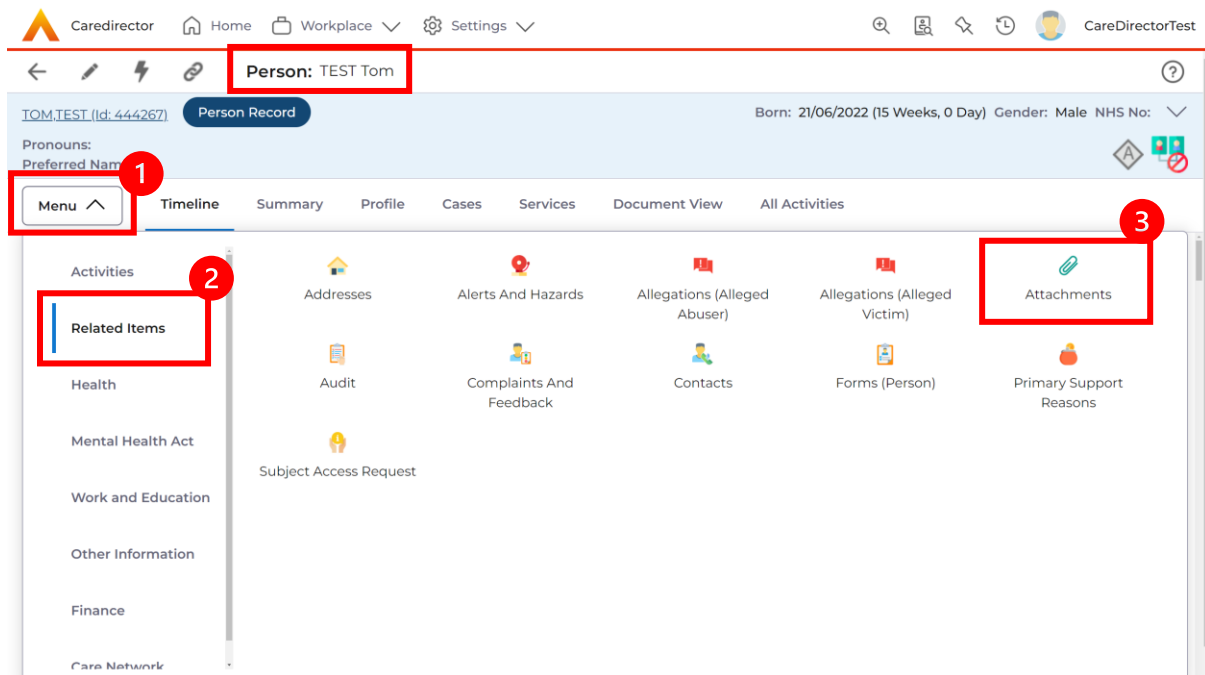
4. Select a **File** from your computer/ SharePoint and select **Open**.



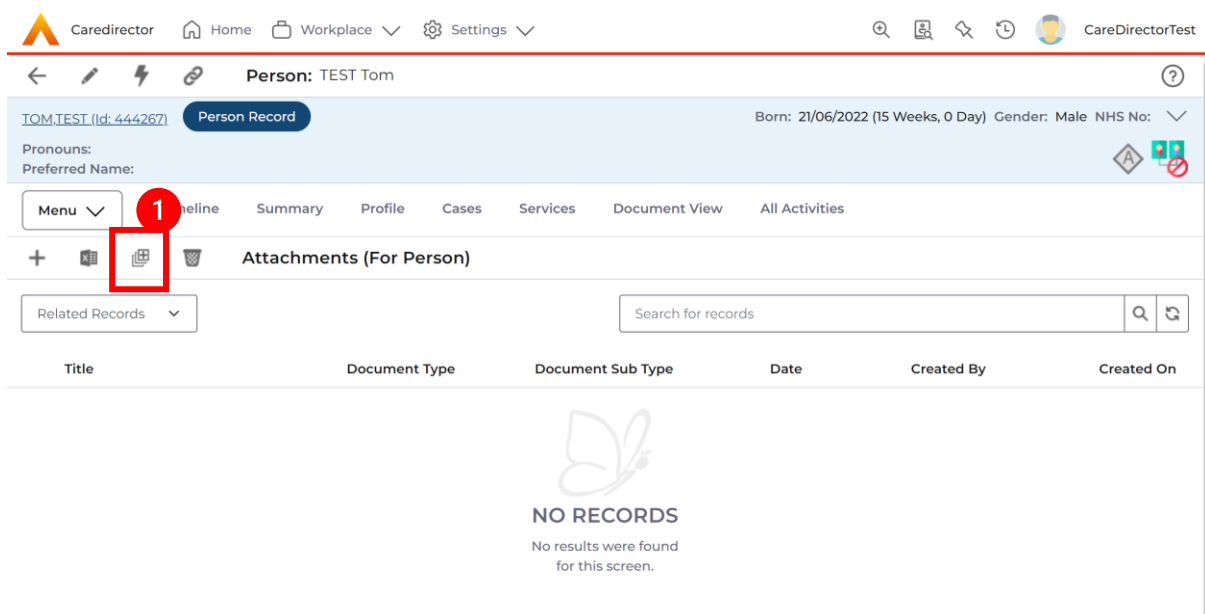
5. After uploading, the file name will appear and then select **Save** from the toolbar.

How to upload multiple attachments

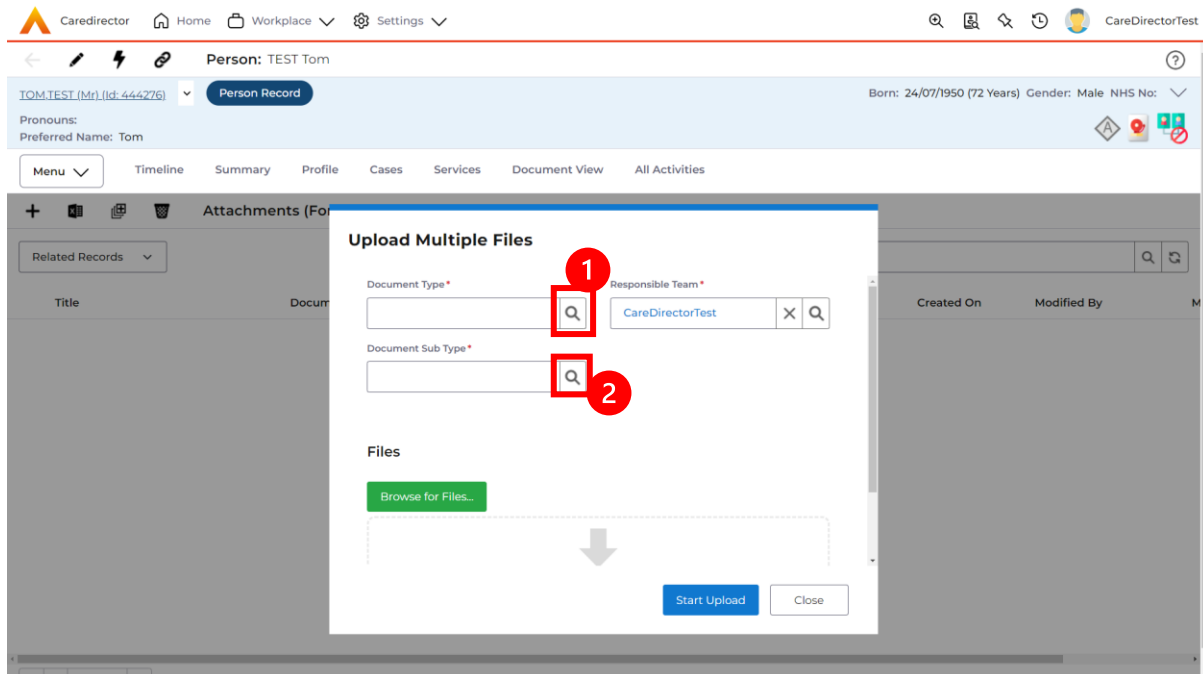
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



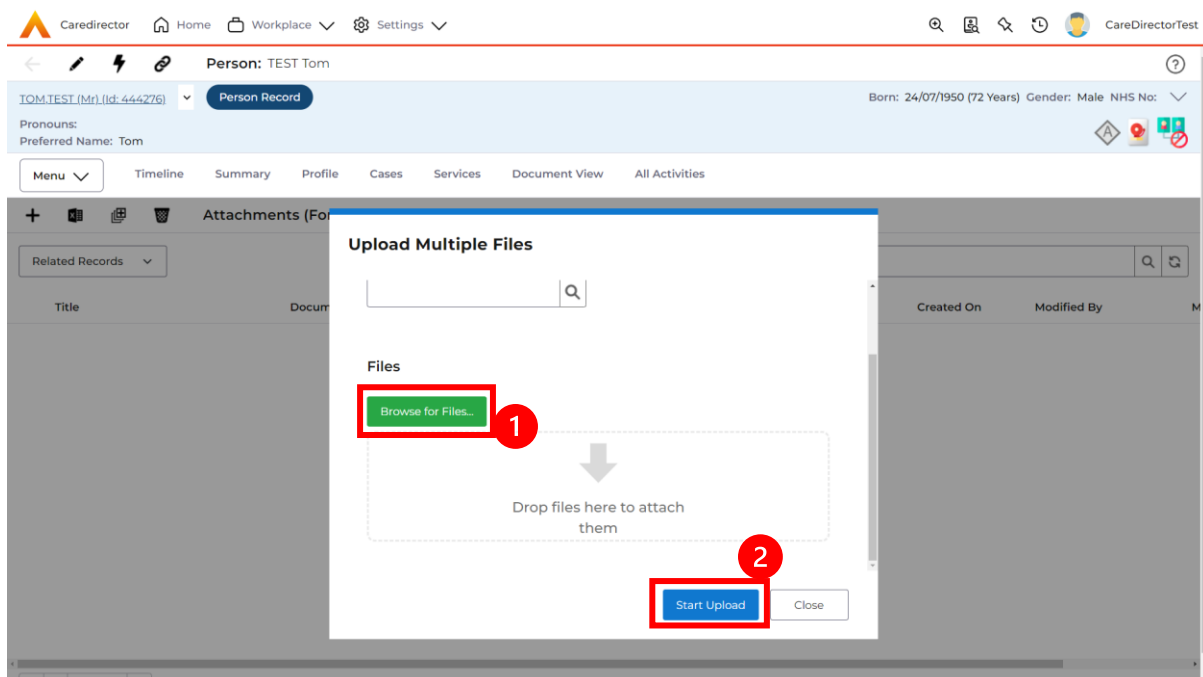
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- 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 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, showing 'Related Items' 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 in CareDirector. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' section is active, showing a table of related records:

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

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

TOM TEST (Id: 444267) 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]

TOM TEST (Id: 444267) 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

Other Information Involvements History Joint Case Members Status History

Team [input] [search]

Profession Type [input] [search]

Reset Refresh Apply

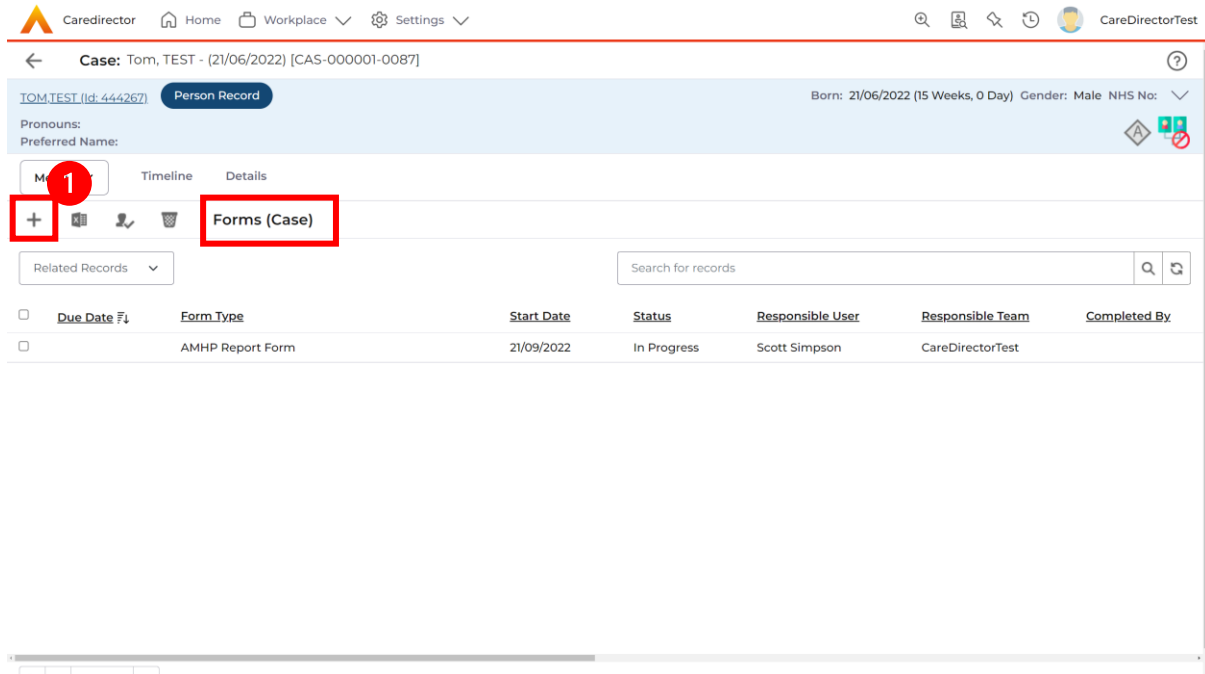
Form (Case) Created 21/09/2022 13:04:25
A new record of form (case) was created by Scott Simpson.

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

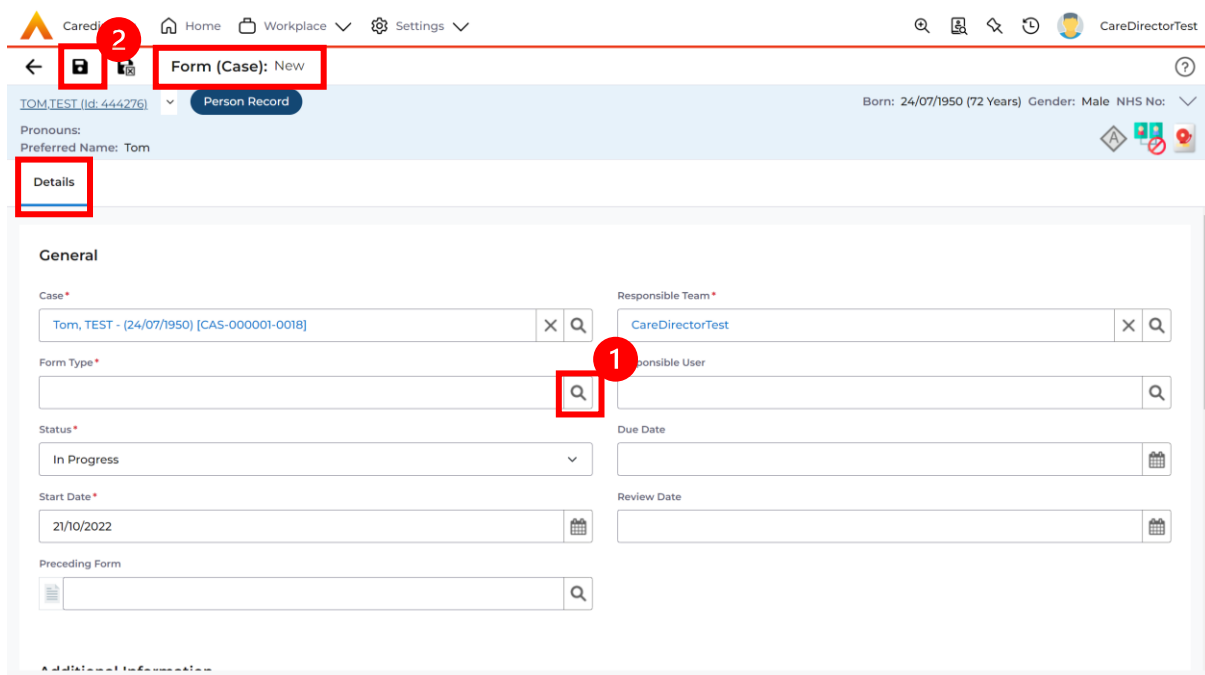
Case Involvement Updated 21/09/2022 12:23:12
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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

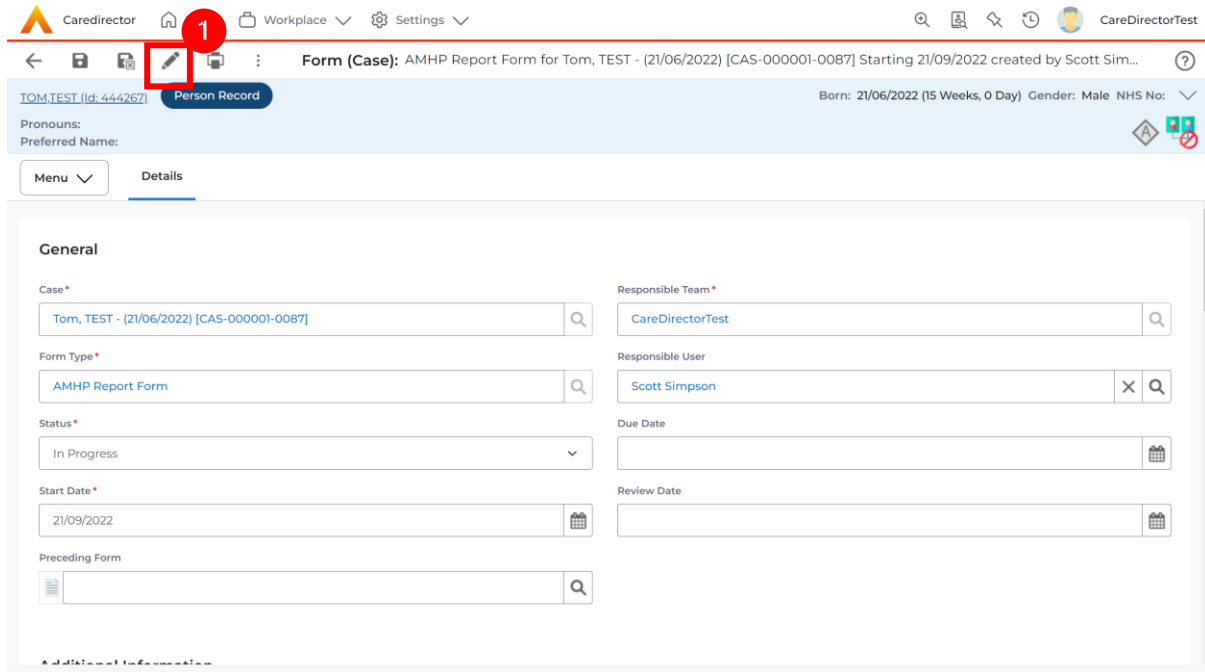
3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



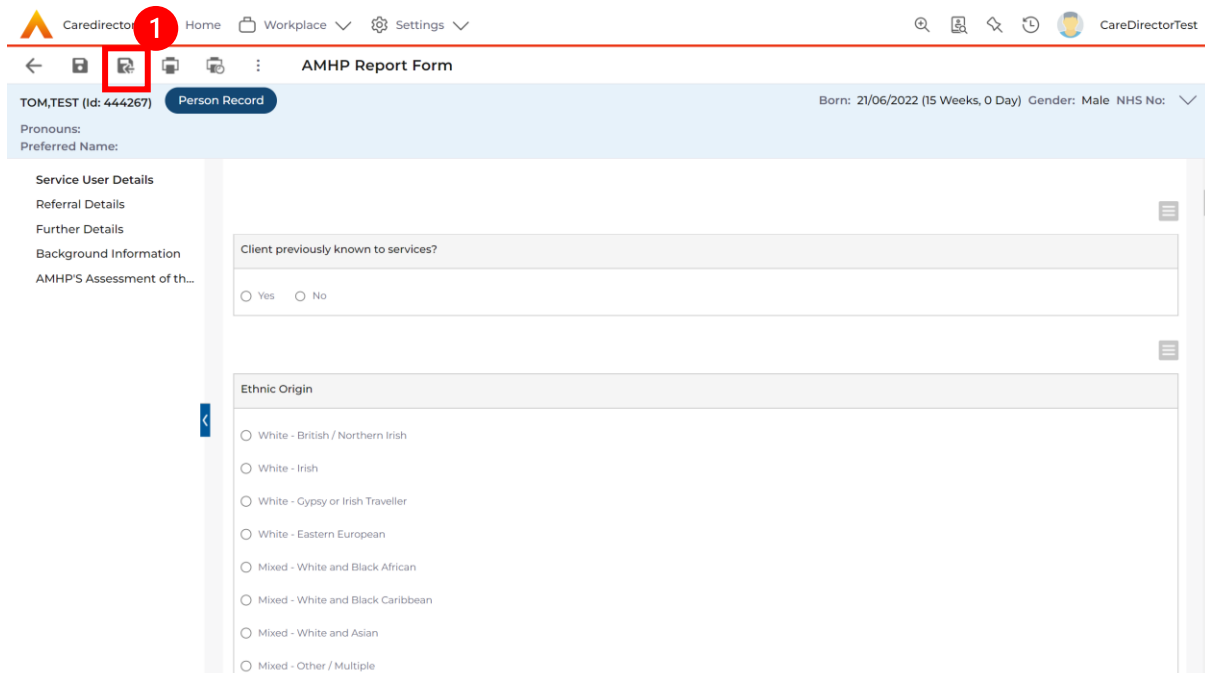
4. Once inside the **Details**. This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type**. When finished, select **Save**.



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.

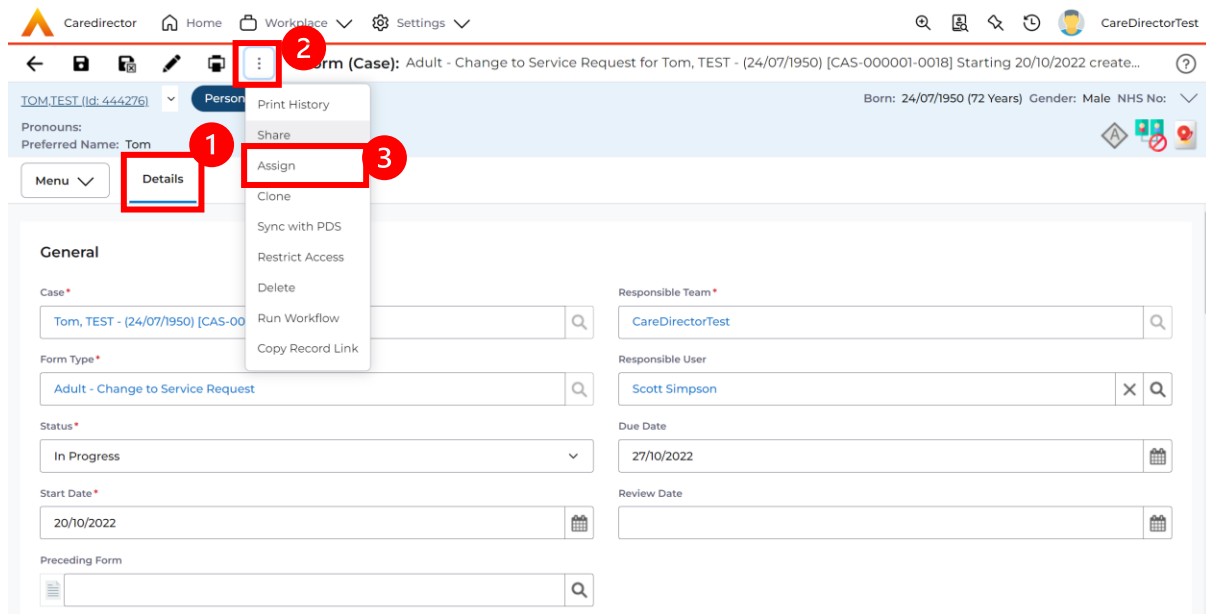


6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

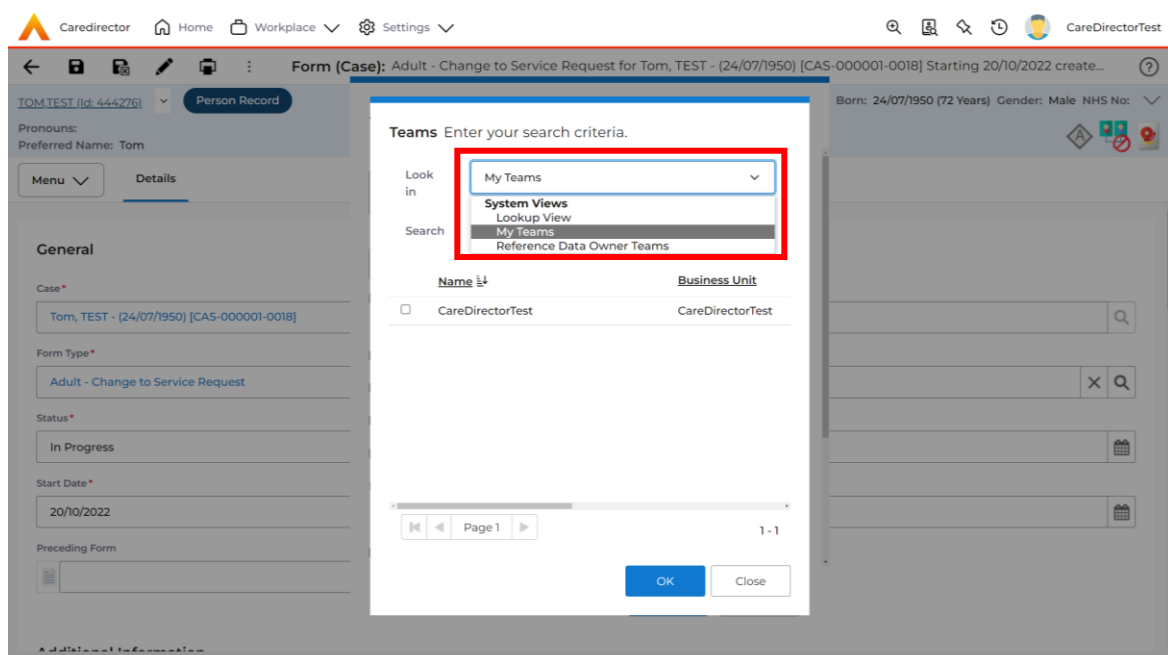


How to Allocate a Form

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



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



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

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)**.

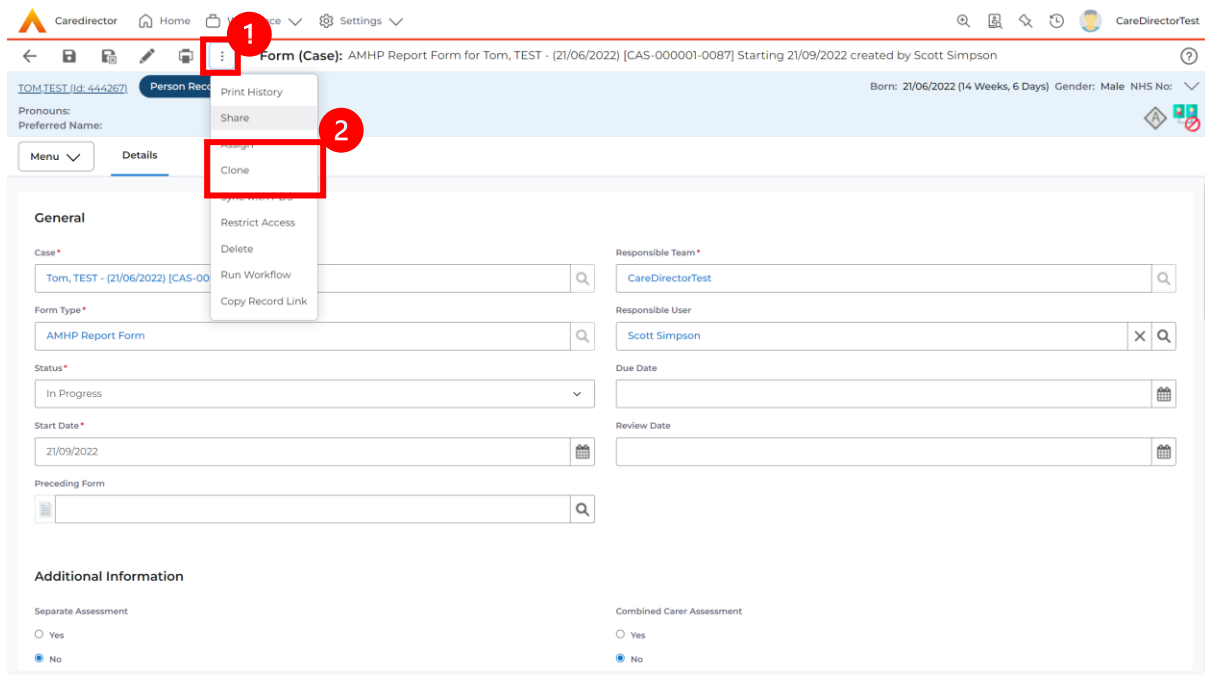
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' is open, and 'Related Items' is selected. The 'Forms (Case)' option is highlighted in the 'Related Items' dropdown. The main content area shows a timeline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

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

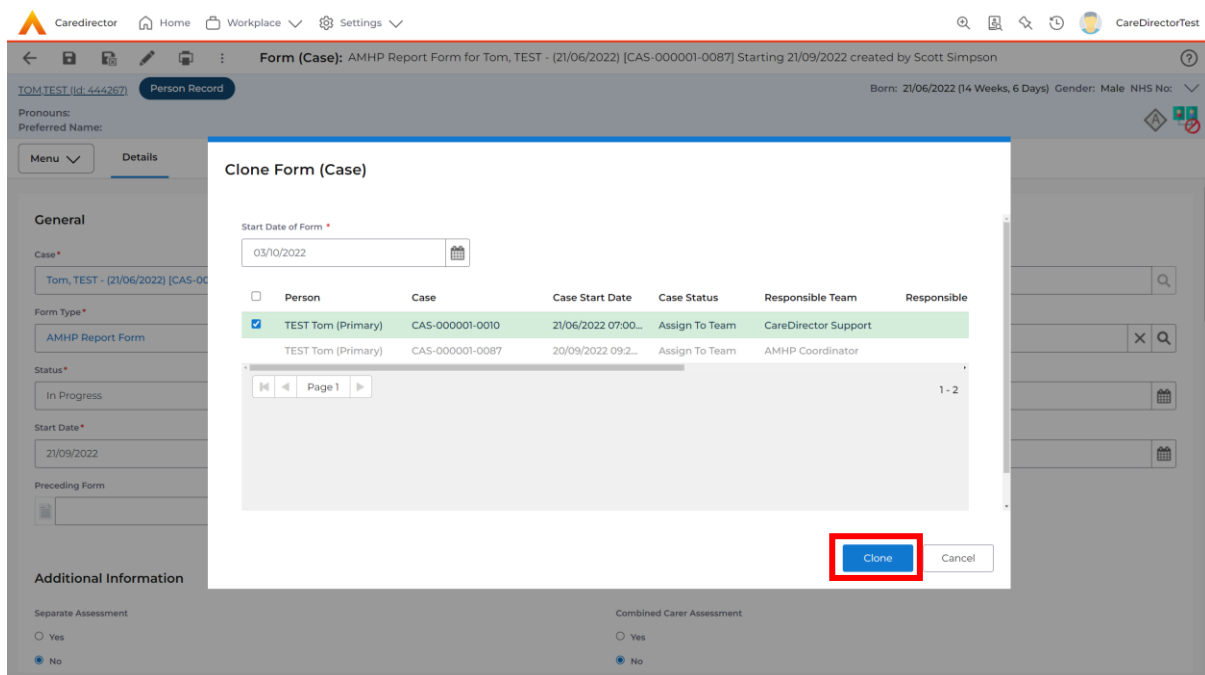
The screenshot shows the CareDirector interface for a case. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' view is open. The 'Related Records' dropdown is open, and the 'AMHP Report Form' is selected. The table below shows the details of the selected form.

	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			

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 displays the CareDirector interface for a specific form record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail shows 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. The user profile for 'CD V6 Team' is visible in the top right.

The main content area shows the 'Person Record' for 'TOM TEST (id: 444267)'. Key details include: Born: 21/06/2022 (20 Weeks, 3 Days), Gender: Male, NHS No: [redacted]. Below this, there are tabs for 'Menu' and 'Details', with 'Details' being the active tab.

The 'General' section contains the following fields:

- 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**: [empty]
- Responsible Team***: CareDirectorTest
- Responsible User**: Scott Simpson
- Due Date**: 11/11/2022
- Review Date**: [empty]

The 'Completion Details' section contains the following fields:

- Completed By***: Scott Simpson
- Completion Date***: 09/11/2022
- Signed Off By***: Scott Simpson
- 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 'Person Record' for 'TOM.TEST (Id: 444267)'. The form details are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0010]
Form Type *	Occupational Therapy Conversation Record
Status *	Closed
Start Date *	10/11/2022
Responsible Team *	CareDirectorTest
Responsible User	Scott Simpson
Due Date	20/12/2022
Review Date	

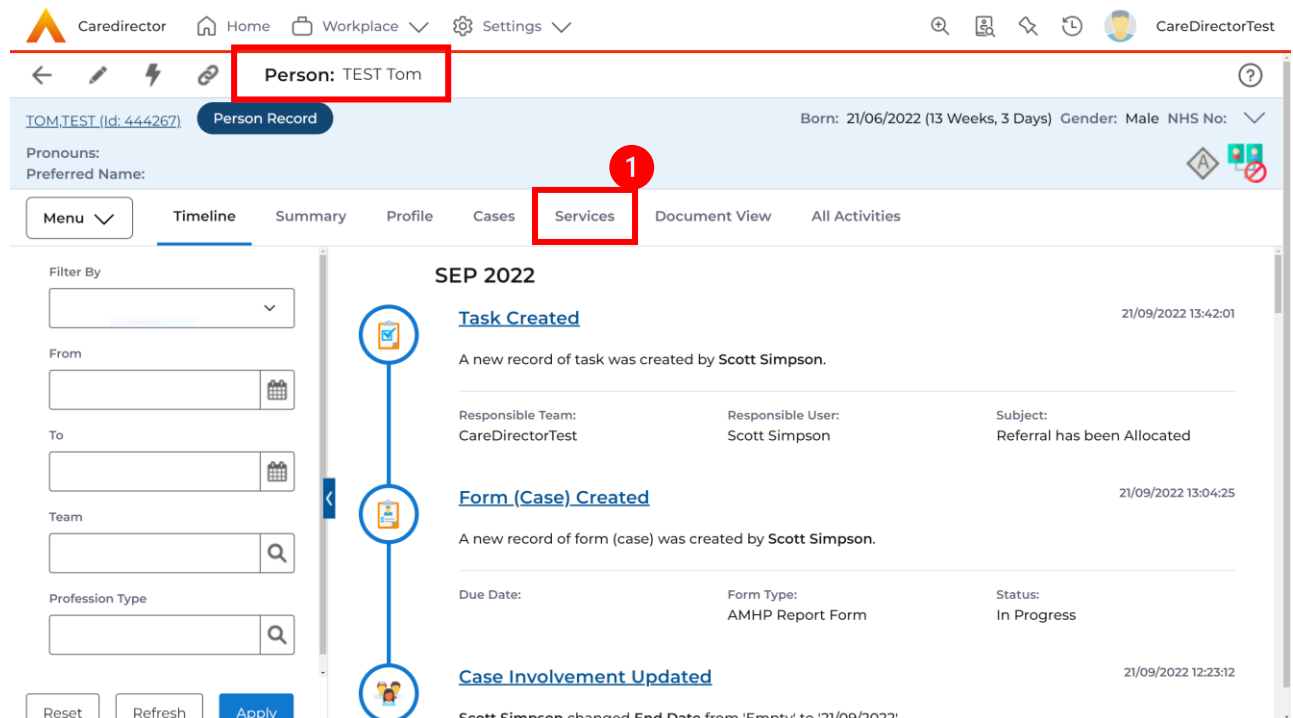
2. Select the **Three Dots** and select **Activate**.

This screenshot shows the same form as the previous one, but with the three-dot menu open. The menu options are: Share, Assign, Clone, Restrict Access, **Activate**, Delete, Run Workflow, and Copy Record Link. The 'Activate' option is highlighted with a red box and a '2' in a red circle. The 'Three Dots' icon is also highlighted with a red box and a '1' in a red circle.

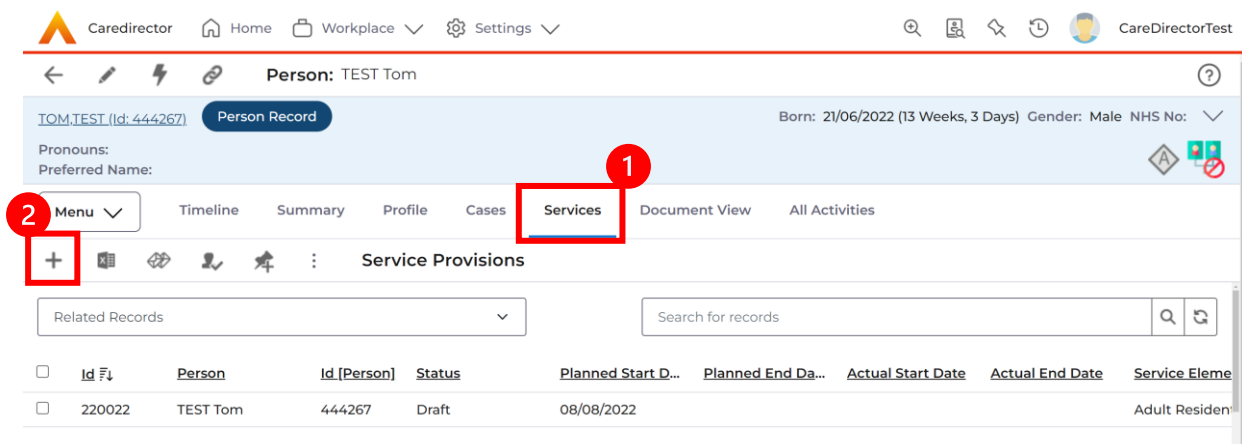
How to input Service Provisions

Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.
2. Select the relevant **Person Record** and select **Services**.



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



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

How to Authorise a Service Provision

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

The screenshot shows the 'Service Provision Statuses' dialog box. The dialog has a search bar and a table of statuses. The 'Ready for Authorisation' status is selected. The 'OK' button is highlighted. Red callouts 1-4 indicate: 1. Status dropdown in the background, 2. Selected status in the dialog, 3. OK button, 4. Save icon in the top toolbar.

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 grid has columns for Id, Person, Planned Start Date, Planned End Date, Actual Start Date, Actual End Date, and Service Element 1. The row for Id 220012 is selected. The 'Services' tab is active. The 'Authorise' option is selected from the context menu. Red callouts 1-4 indicate: 1. Services tab, 2. Selected row, 3. Three dots menu icon, 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". The "Service Deliveries" tab is selected and highlighted with a red box and a red circle containing the number "1". The "Create New Record" button (a plus sign in a square) is also highlighted with a red box and a red circle containing the number "2". Below the tabs, there 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 * TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 22008...	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	

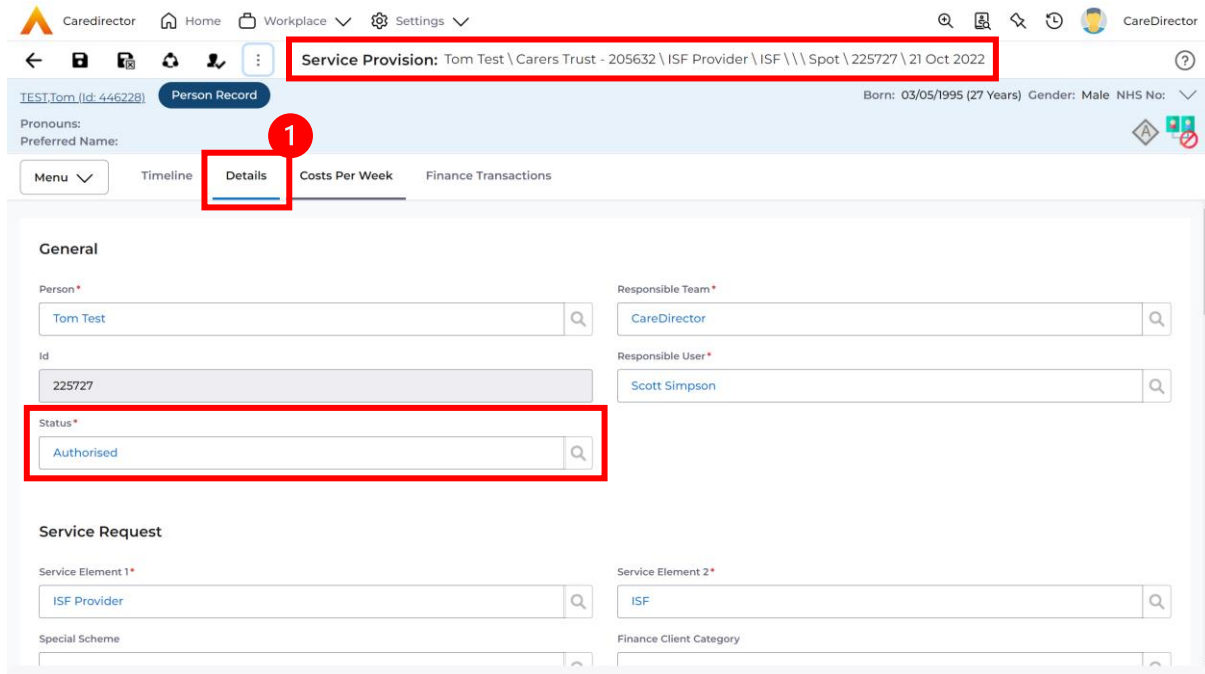
Schedule applies to days

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

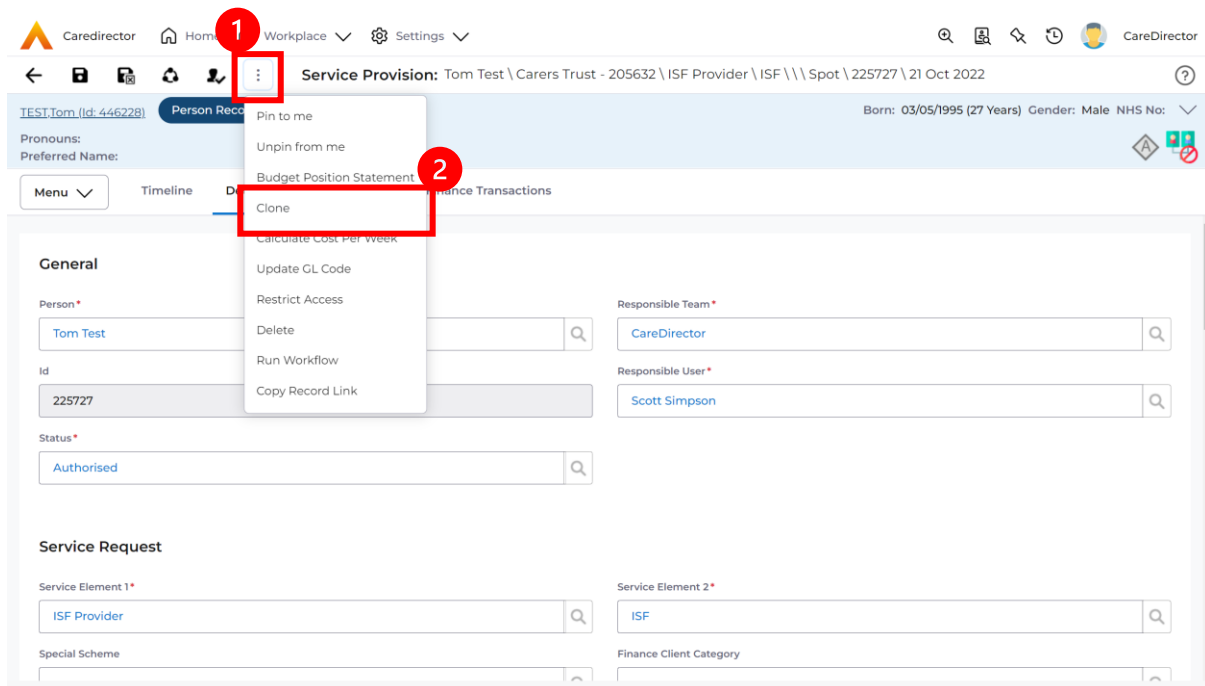
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

How to Clone a Service Provision

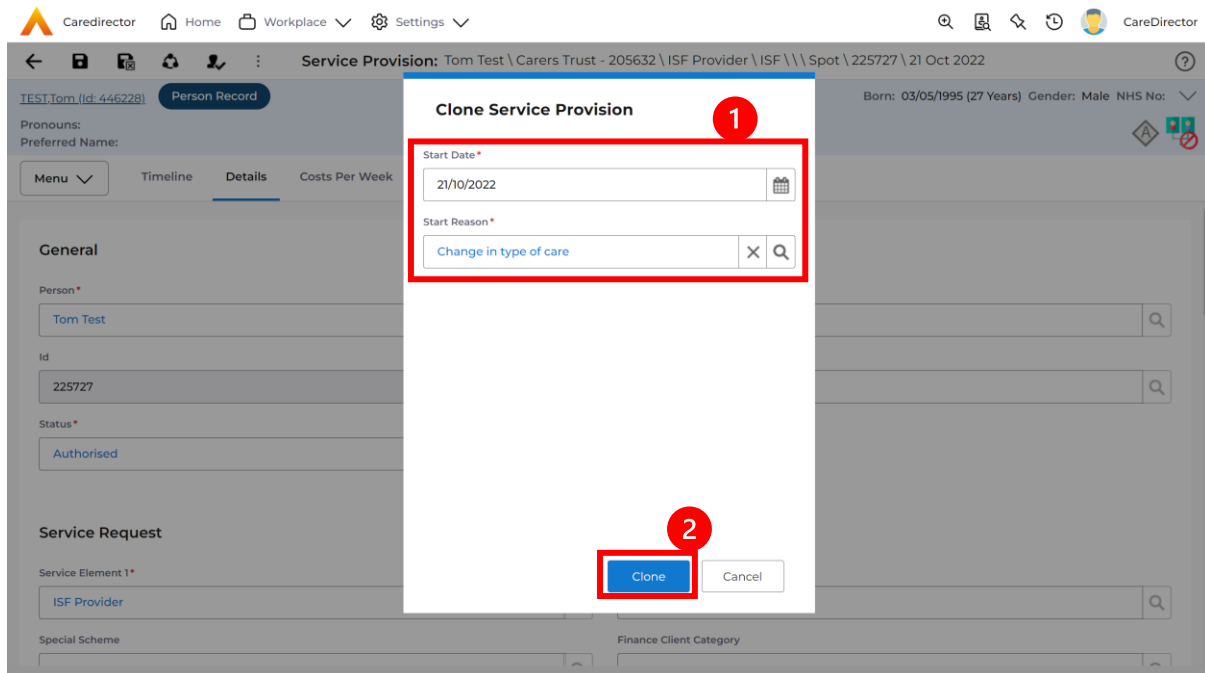
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



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 'Details' tab is selected. The 'Dates' section contains the following fields:

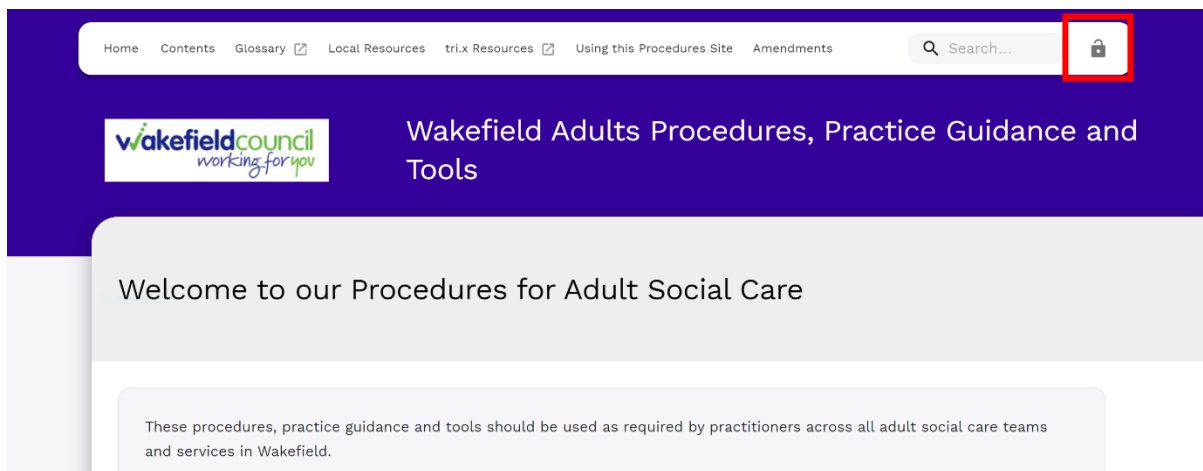
Field	Value
Planned Start Date	24/06/2022
Planned End Date	
Actual Start Date	
Actual End Date	21/10/2022
Start Reason*	New Placement
End Reason*	Carer's Decision

The 'Commissioning' section contains the following fields:

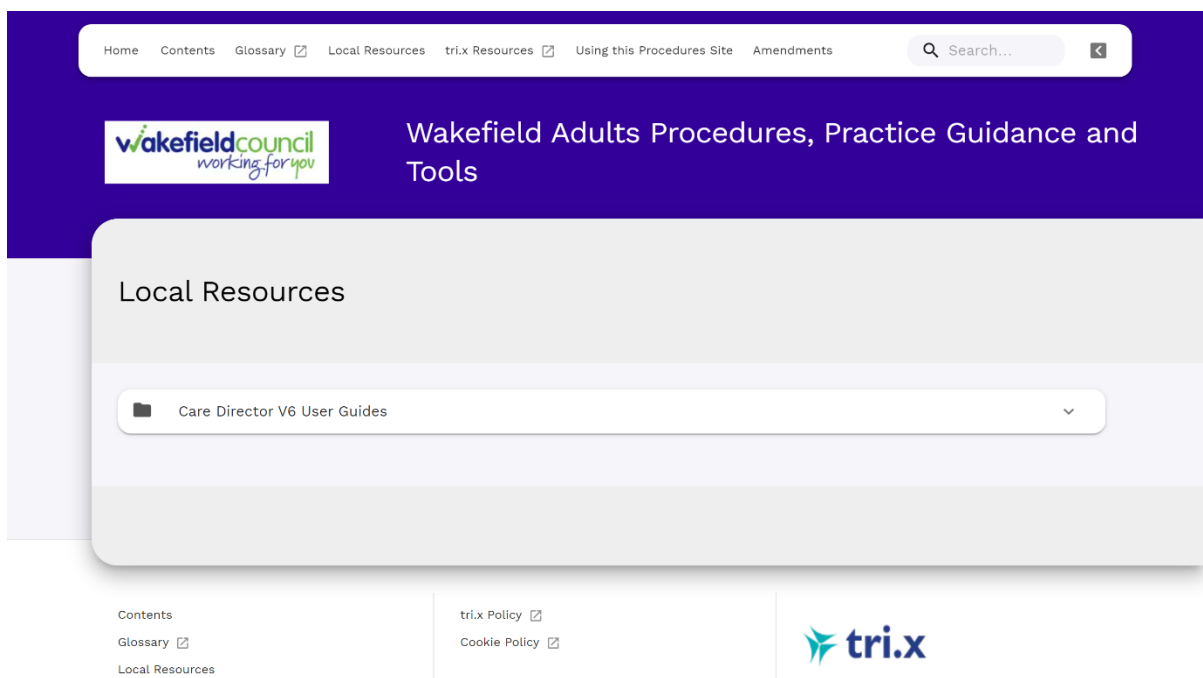
Field	Value
Purchasing Team	Adults Connecting Care Team East
Frequency in Weeks*	1

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	12/10/2022