



# Emergency Planning Team V1.0

**Document** CareDirector Emergency Planning Team Bespoke Guide.  
**Purpose** Emergency Planning daily tasks on CareDirector.  
**Version** V1.0  
**Owner** ICT Business Transformation Team  
**Last Updated** 11/11/2022

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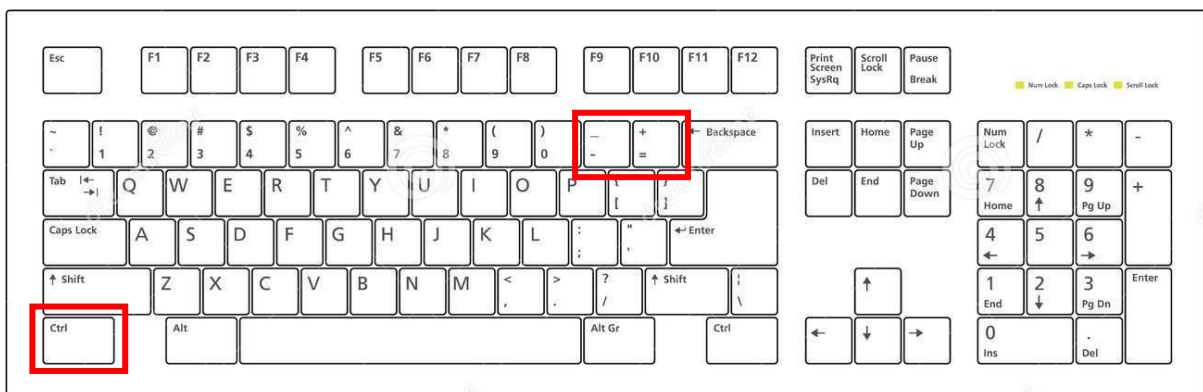
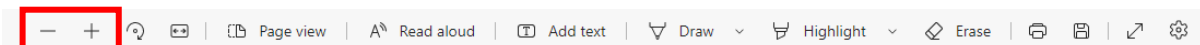
## Guide Information

### Before Live Access...

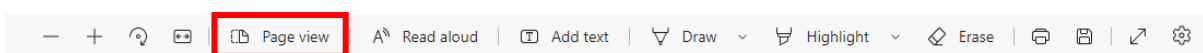
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### Guide Navigation

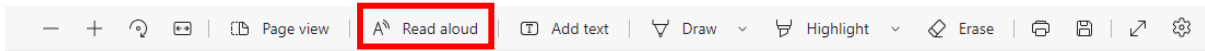
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



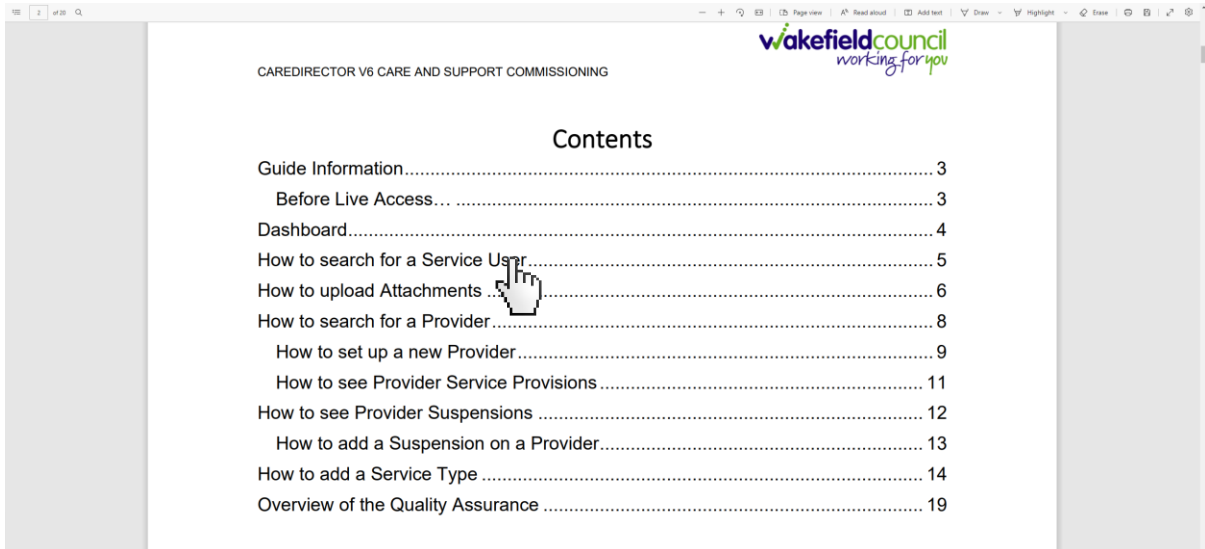
3. To put pages next to one another, select the **Page View** icon on the toolbar.



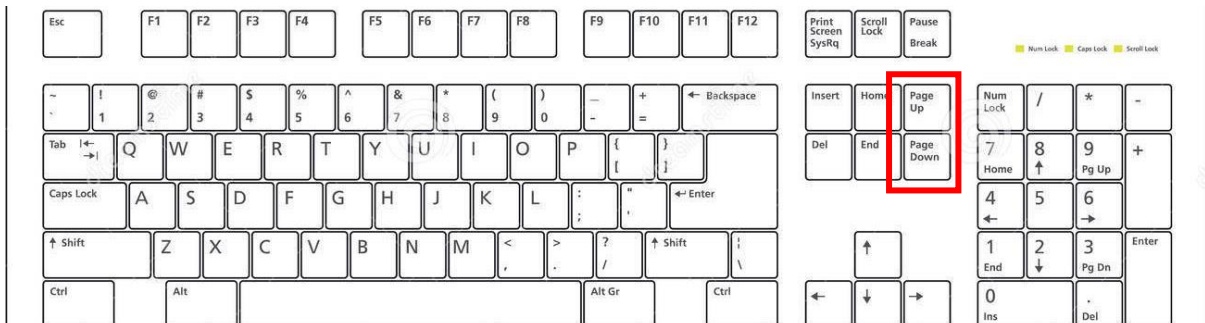
4. For auditory assistance, select **Read Aloud** from the toolbar.



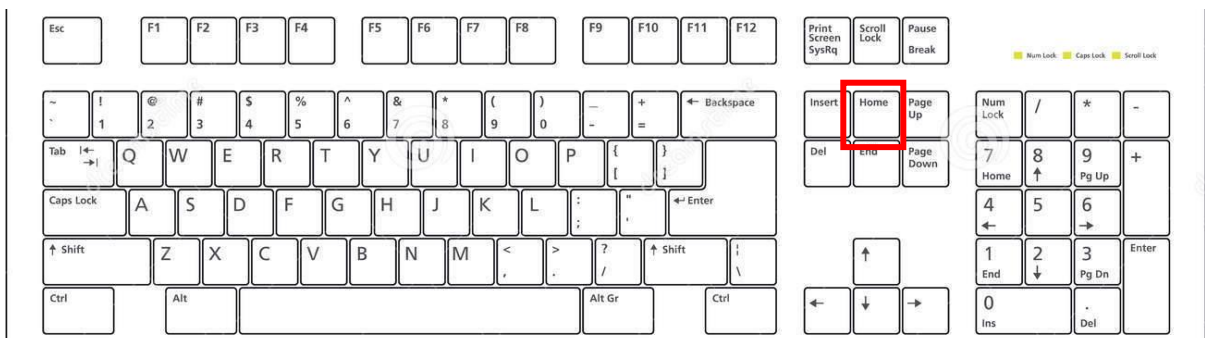
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

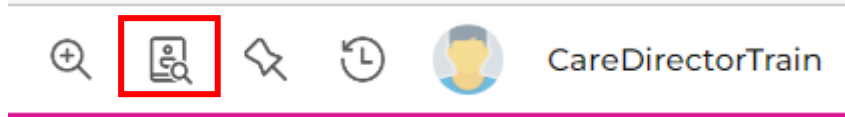


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## 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**.

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

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

The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user profile 'CareDirectorTest' is visible. The main header shows 'Person: TEST Tom' with a red box and a '1' in a red circle. Below this, the 'Person Record' tab is active. The 'Cases' tab is selected and highlighted with a red box. The main content area displays a table of related records. The table has columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', and 'Case Status'. The first two rows are highlighted with a red box and a '2' in a red circle. The first row is 'CareDirector Support' with 'Case Date/Time' 21/06/2022 07:00:00, 'Contact Reason' A - Adult Safeguarding, 'Case No' CAS-000001-0010, and 'Case Status' Assign To Team. The second row is 'AMHP Coordinator' with 'Case Date/Time' 20/09/2022 09:20:00, 'Contact Reason' A - AMHP Assessment, 'Case No' CAS-000001-0087, and 'Case Status' Assign To Team.

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

## How to 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' in a red circle. The 'Search' button is highlighted with a red box and a '2' in a red circle.

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.

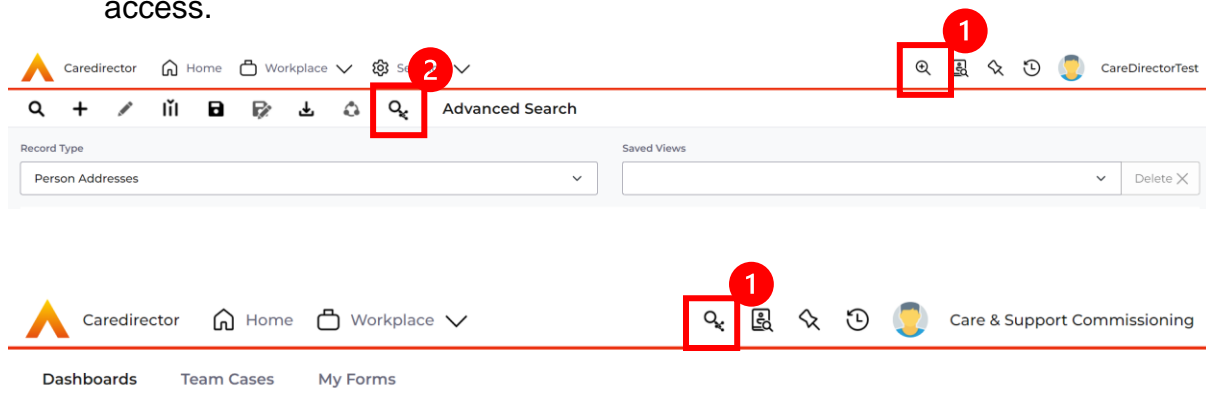
The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' table is displayed. The 'Regarding' column is highlighted with a red box.

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

## 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'. The breadcrumb trail shows 'Person: TEST Tom'. The main header displays 'TOM.TEST (Id: 444267)' and 'Person Record'. Below this, there are tabs for 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. 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.

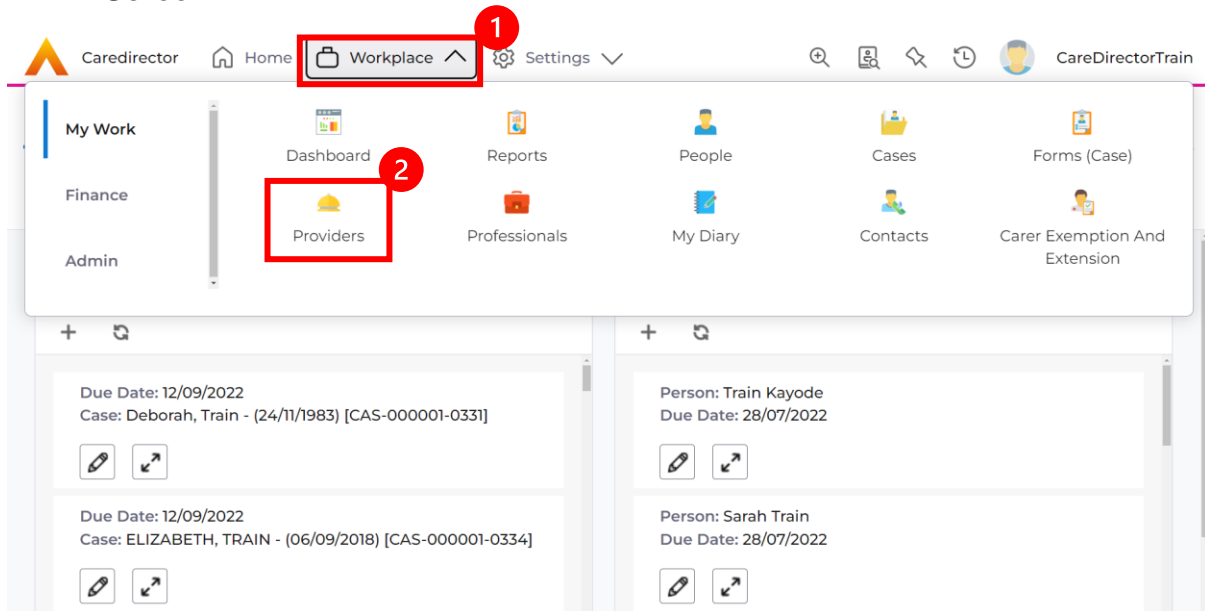
3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.

The screenshot shows the CareDirector interface with the 'Services' tab selected. The 'Service Provisions' toolbar is visible, and the 'Create New Record' button (a plus sign in a square) is highlighted with a red box and a red circle containing the number '2'. The main content area shows a table of service provisions. The table has columns for 'Id', 'Person', 'Id [Person]', 'Status', 'Planned Start D...', 'Planned End Da...', 'Actual Start Date', 'Actual End Date', and 'Service Eleme'. A single record is shown with Id '220022', Person 'TEST Tom', Id [Person] '444267', Status 'Draft', and Planned Start Date '08/08/2022'.

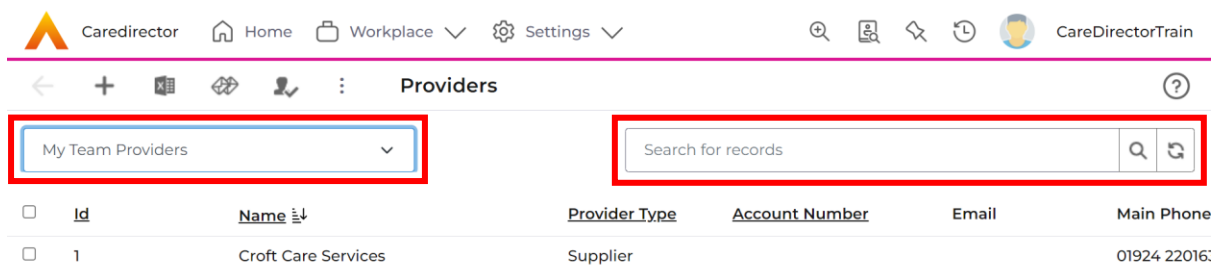
4. Then follow the appropriate section to complete the **Service Provision**.

## How to search for a Provider

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

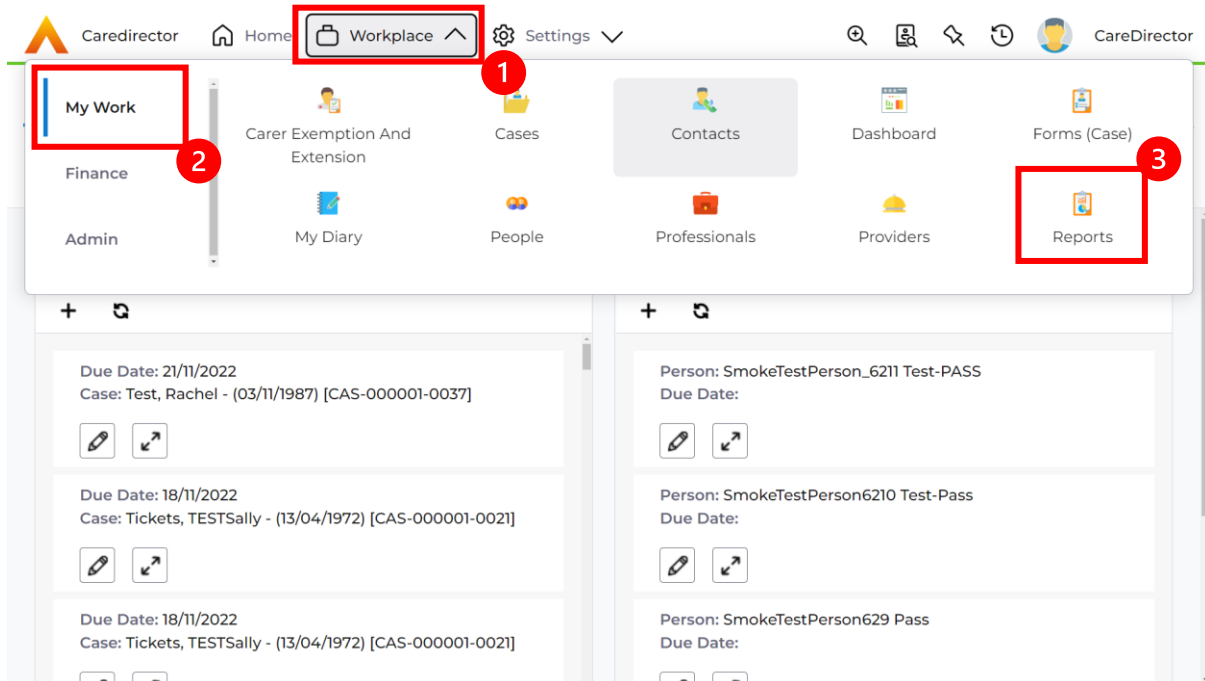


2. Use the **System View** or the **Search** box to enter in the name of a **Provider**. Use the next or previous Page buttons or use the wildcard \* for help during searches. When found, select the one you need.

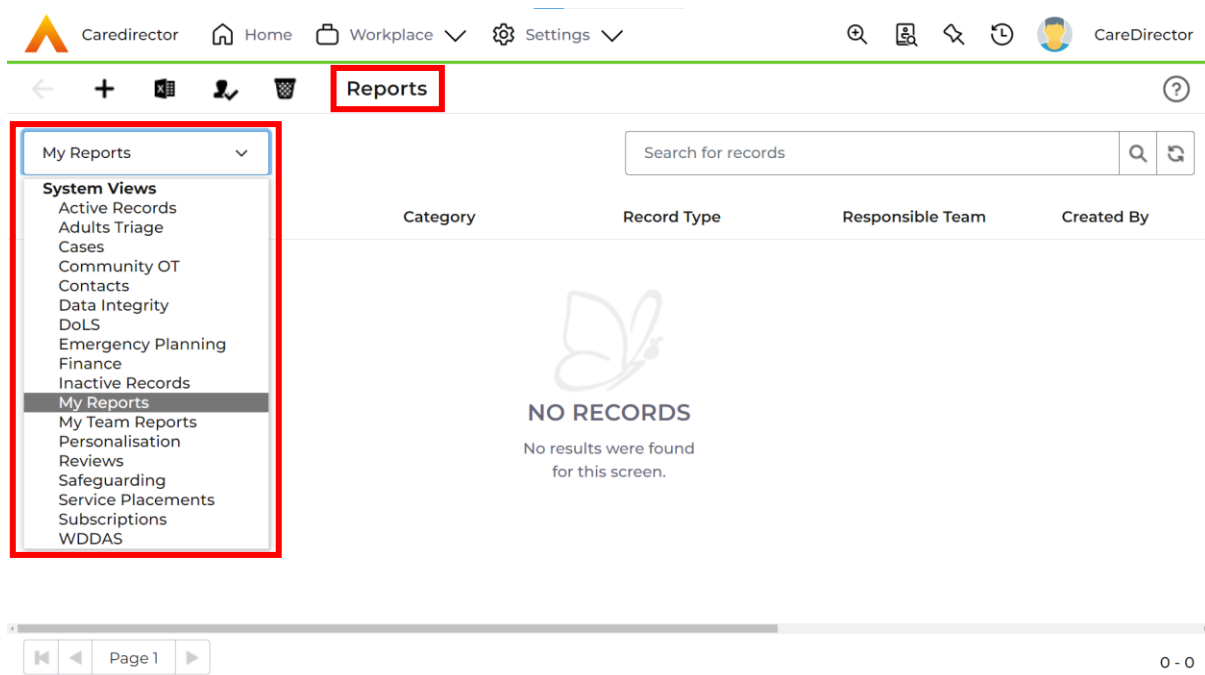


## How to find Reports

1. On the **Navigation Menu**, select **Workplace**, **My Work** and then **Reports**.



2. Using the **System View** search through to your relevant team name and select it.



3. When your team has been selected, a list of **Reports** will be available. Select the relevant one.

<input type="checkbox"/>	Title	Created By	Created On	Modified By	Modified On
<input type="checkbox"/>	All Wkly Open Safe Refs	Jonathon Brailsford	25/10/2022 11:41:17	Jonathon Brailsford	01/11/2022 11:24:31
<input type="checkbox"/>	ASG Wkly Closed Safe Refs	Jonathon Brailsford	25/10/2022 11:42:15	Jonathon Brailsford	25/10/2022 11:42:15
<input type="checkbox"/>	DA28 Detail Report	Jonathon Brailsford	25/10/2022 11:18:33	Jonathon Brailsford	02/11/2022 13:26:...
<input type="checkbox"/>	DA28 Report	Jonathon Brailsford	25/10/2022 11:26:03	Jonathon Brailsford	25/10/2022 11:26:03
<input type="checkbox"/>	DA28 Report with Extras	Jonathon Brailsford	25/10/2022 11:27:02	Jonathon Brailsford	25/10/2022 11:27:02
<input type="checkbox"/>	DA4 Report	Jonathon Brailsford	25/10/2022 11:27:46	Jonathon Brailsford	25/10/2022 11:27:46
<input type="checkbox"/>	Emergency Planning Report - Active ...	Jonathon Brailsford	02/11/2022 07:46:...	Jonathon Brailsford	03/11/2022 16:27:45
<input type="checkbox"/>	New WDDAS Exit form	Jonathon Brailsford	25/10/2022 11:28:32	Jonathon Brailsford	25/10/2022 11:28:32
<input type="checkbox"/>	New WDDAS Exit Form V2	Jonathon Brailsford	25/10/2022 11:29:14	Jonathon Brailsford	25/10/2022 11:29:14
<input type="checkbox"/>	Person ID Test	Marc Musgrave	25/10/2022 11:48:...	Marc Musgrave	25/10/2022 14:16:51

4. When selected, it will show this screen. To run the **Report**, select either one of the two options inside of the red boxes (please note the red boxes are only available in this guide).

**Report: Emergency Planning Report - Active Adult Service Users**

Menu ▾ Details

**General**

Title \*  
Emergency Planning Report - Active Adult Service Users

Description

Report URL \*  
<https://cdv6reporting.wakefield.gov.uk/Reports/report/W...>

Category \*  
Emergency Planning

Record Type  
ServiceProvision

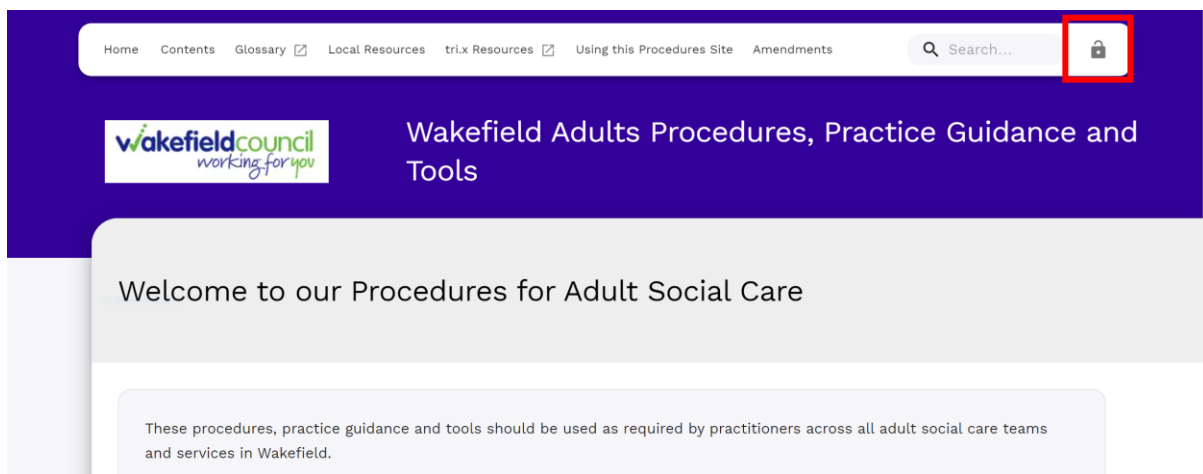
Responsible Team \*  
CareDirector

Pass User Information?  
 Yes  
 No

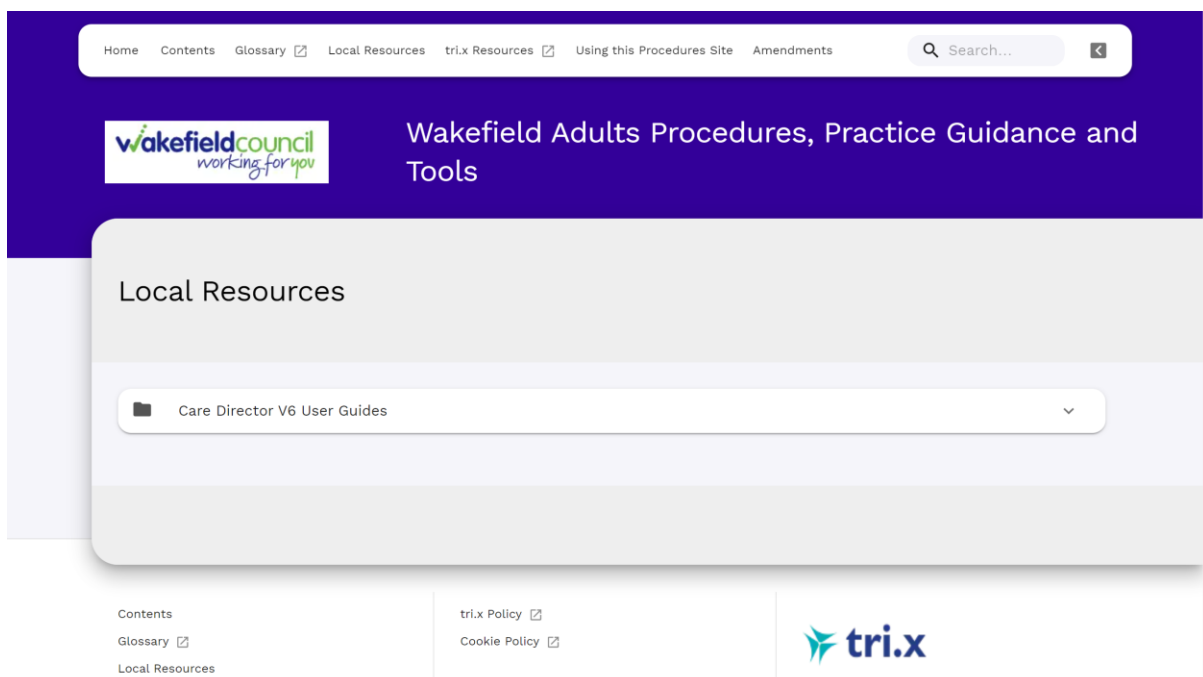
Display in Record Type Menu

## 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	14/10/2022