Practitioner

Document	Practitioner
Purpose	A role-based resource tailored towards the Practitioner role.
Version	V1.0
Owner	ICT Business Transformation Team / Adults System Support Team
Last Updated	22/05/2023

Contents

Purpose

The purpose of this guide is to provide a comprehensive overview of the admin/CSO role from a system perspective. It outlines the different areas you will focus on and the suggested route to find the next step. Additionally, it covers key tasks that are part of your daily responsibilities. However, please note that this guide is not exhaustive and may vary based on team processes. It is important to communicate with your team and managers to clarify specific duties. You can use this guide as a helpful resource for following the provided instructions.

If you have suggestions for improving the resource or if your team requires a team-specific guide, please reach out to AdultsSystemSupport@wakefield.gov.uk. We can schedule a Microsoft Teams call to gather the necessary information and address your team's needs.

Data restriction/ Code of Conduct

If you become aware that a relative or any other person known to you has a record in Caredirector, it is important to promptly inform your manager. Once notified, your manager will take the necessary steps to ensure the record is locked down in Caredirector through the eForms by Adults System Support.

Locking down the record means implementing additional security measures to restrict access and safeguard the confidentiality of the individual's information. This action is taken to protect the privacy and integrity of the record and prevent unauthorized access.

By notifying your manager and following the appropriate procedures, you contribute to maintaining the security and compliance of Caredirector and ensure the confidentiality of sensitive information.

Practitioner

Finding Allocated Cases

1. The primary purpose of Caredirector is to provide a comprehensive overview of an individual's care journey and effectively manage it. It accomplishes this by allowing users to add various components such as forms, activities, and other relevant information. Caredirector serves as a centralized platform where all aspects of a person's care can be documented, tracked, and managed. It enables healthcare professionals and caregivers to have a holistic view of the individual's care, facilitating better coordination, decision-making, and ensuring that their care needs are met effectively.

2. A practitioner holds the responsibility of effectively managing their case load and ensuring that Caredirector is consistently updated with relevant information. This includes documenting any conversations, events, or developments pertaining to the individual's care. It is essential to keep Caredirector up to date with the current situation, progress, and future plans for the person under their care. By maintaining accurate and timely records, practitioners contribute to the overall continuity of care and enable effective collaboration among the care team.

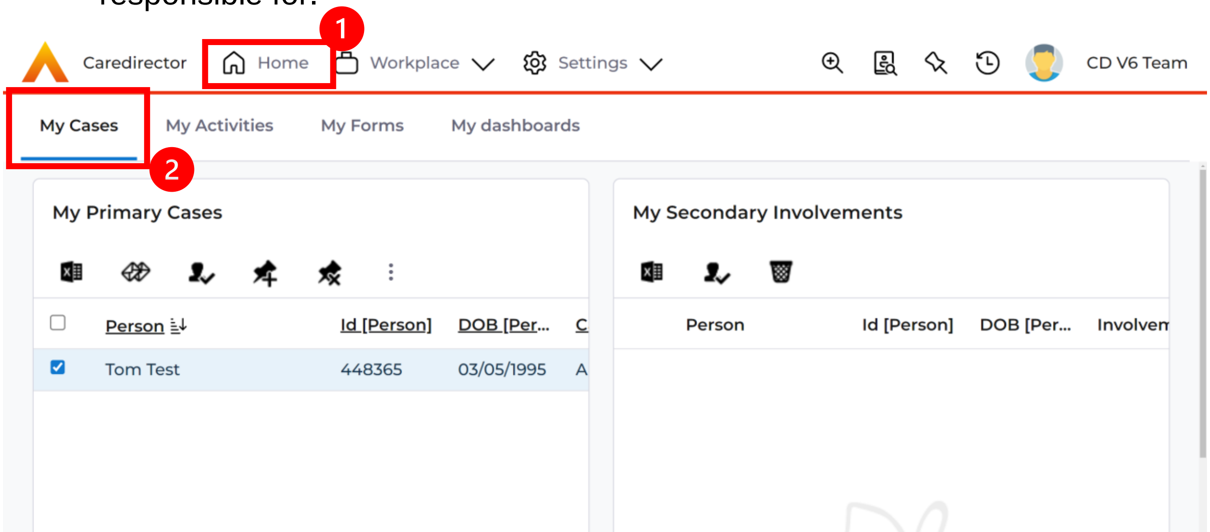
3. Managers or team leaders typically assign cases to practitioners, and these allocated cases are displayed on the practitioners' home screen dashboards in Caredirector. When practitioners open Caredirector, their home screen will show a dashboard specifically tailored for them, which includes a section called "My Cases." This section provides an overview of the cases assigned to the practitioner, allowing them to easily access and manage their workload. The My Cases dashboard provides practitioners with a centralized view of the cases they are responsible for, enabling efficient case management and timely follow-up on tasks and actions.

4. The "My Cases" section on the home screen in Caredirector provides practitioners with a convenient way to view and manage their assigned cases. It consists of two widgets: Primary Cases and Secondary Cases.

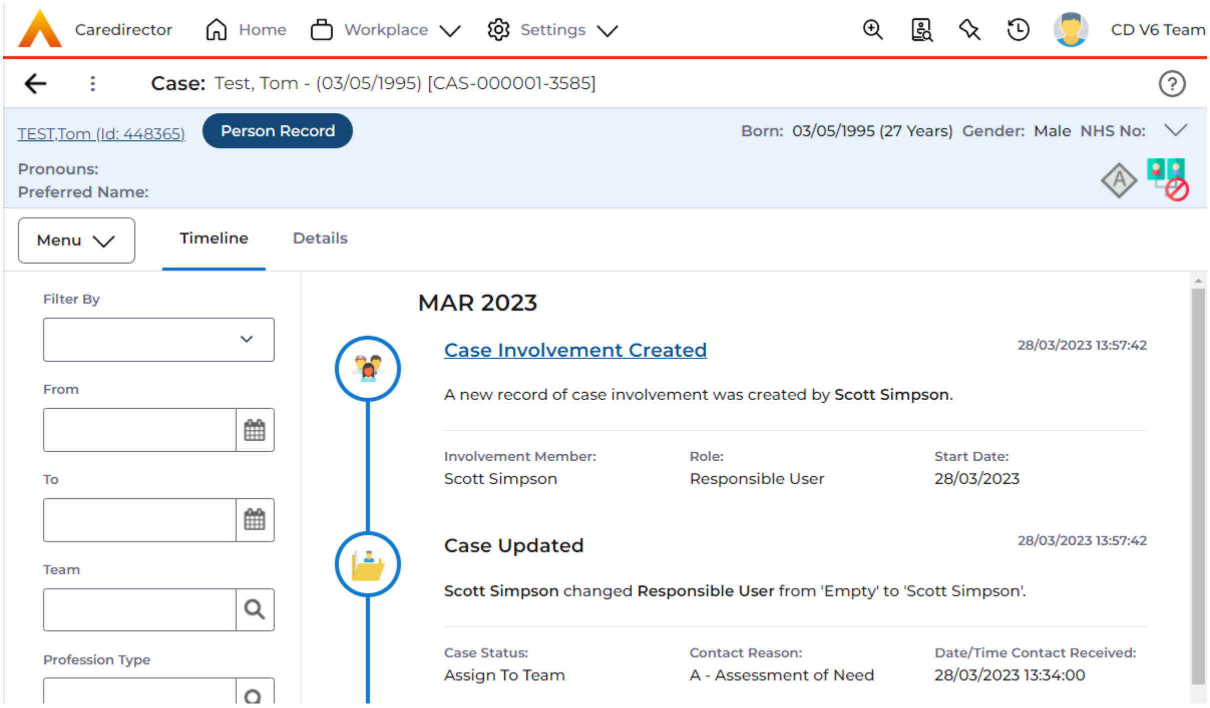
    a. Primary Cases: This widget displays cases where the practitioner is assigned as the Responsible User. These are the cases for which the practitioner has direct responsibility, and they should actively work on and monitor these cases.

    b. Secondary Cases: This widget shows cases where the practitioner is involved as a secondary participant or has a supporting role. While not directly responsible for these cases, practitioners may need to stay informed about their progress and contribute as needed.

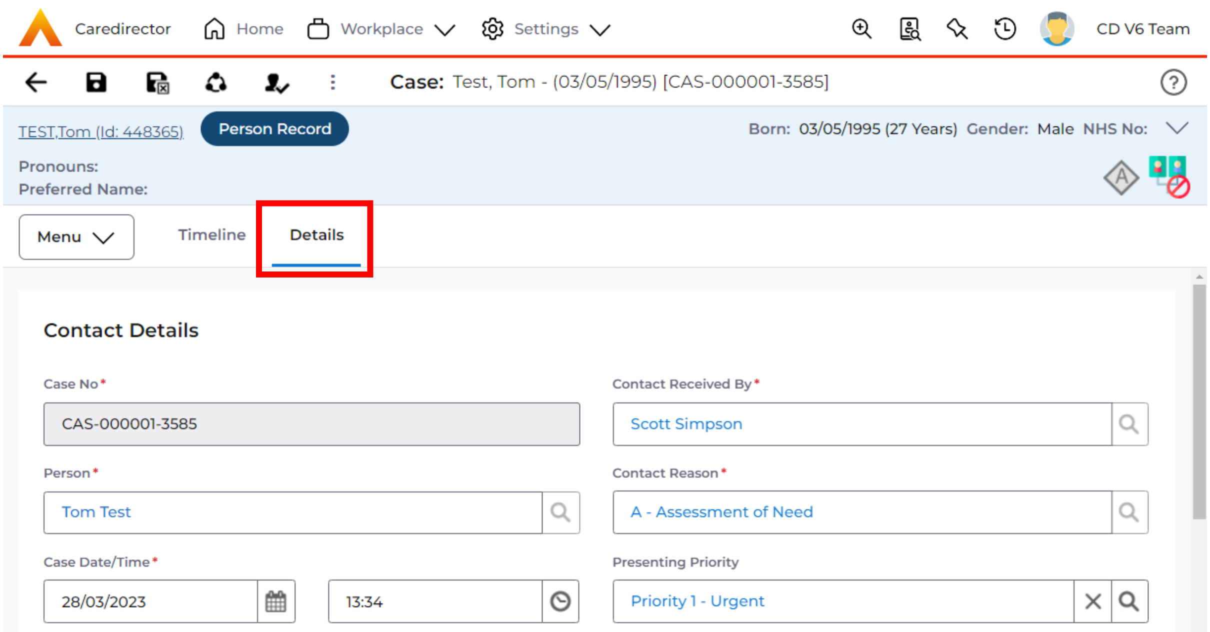
5. The separation between Primary Cases and Secondary Cases helps practitioners prioritize their workload and focus on the cases they are primarily responsible for.



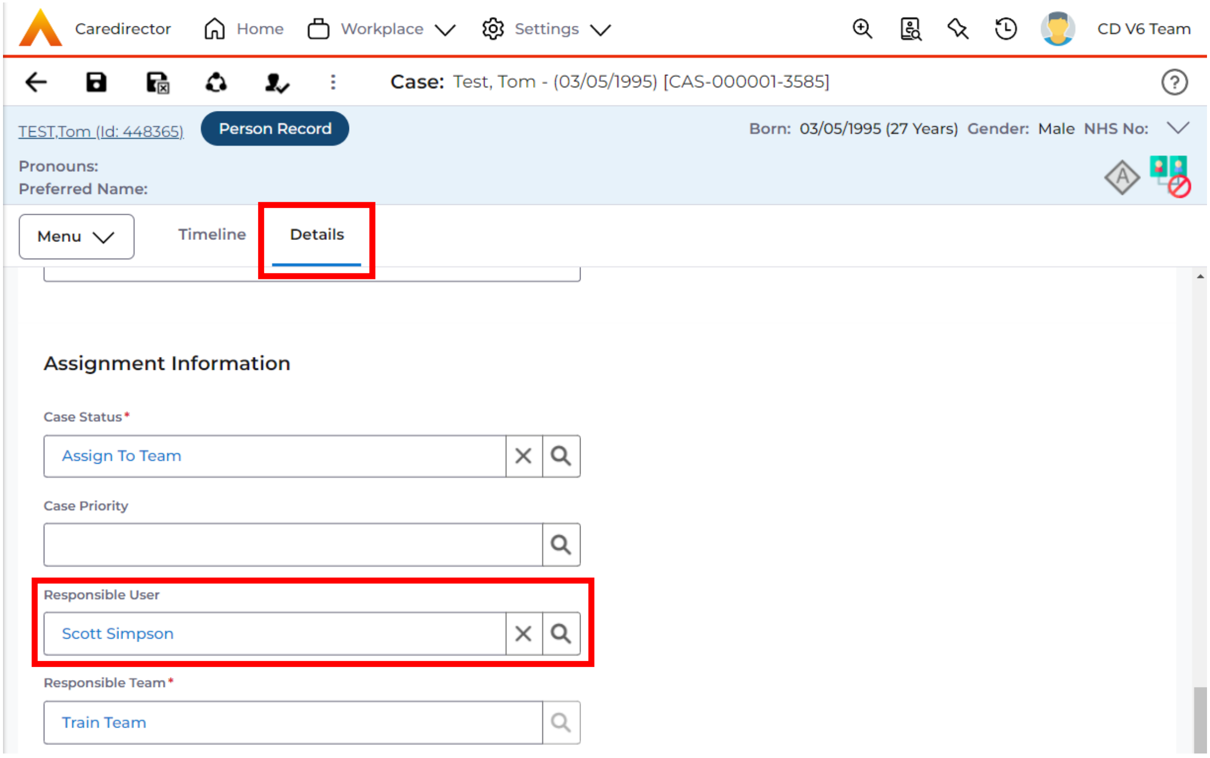
6. Select the relevant person from your list by clicking anywhere on that row this will open the **Case Record.**



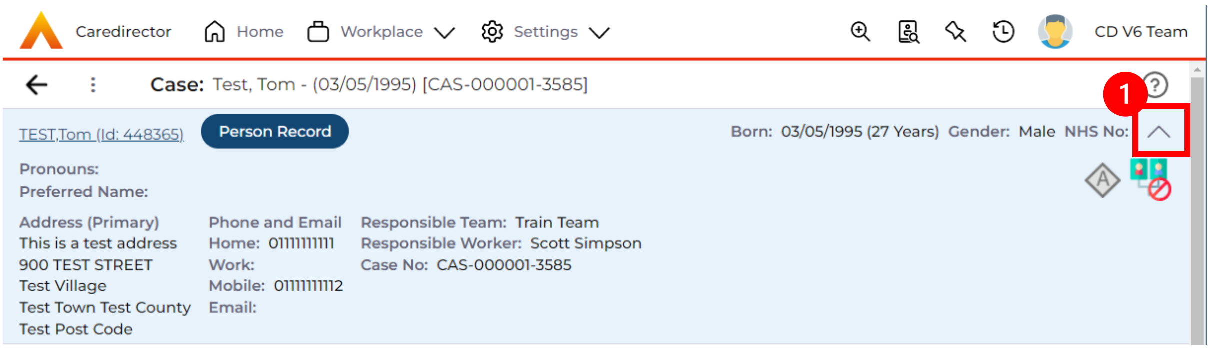
7. **Details** tab next to **Timeline** in the middle row will open why the person was referred and will provide information about it.



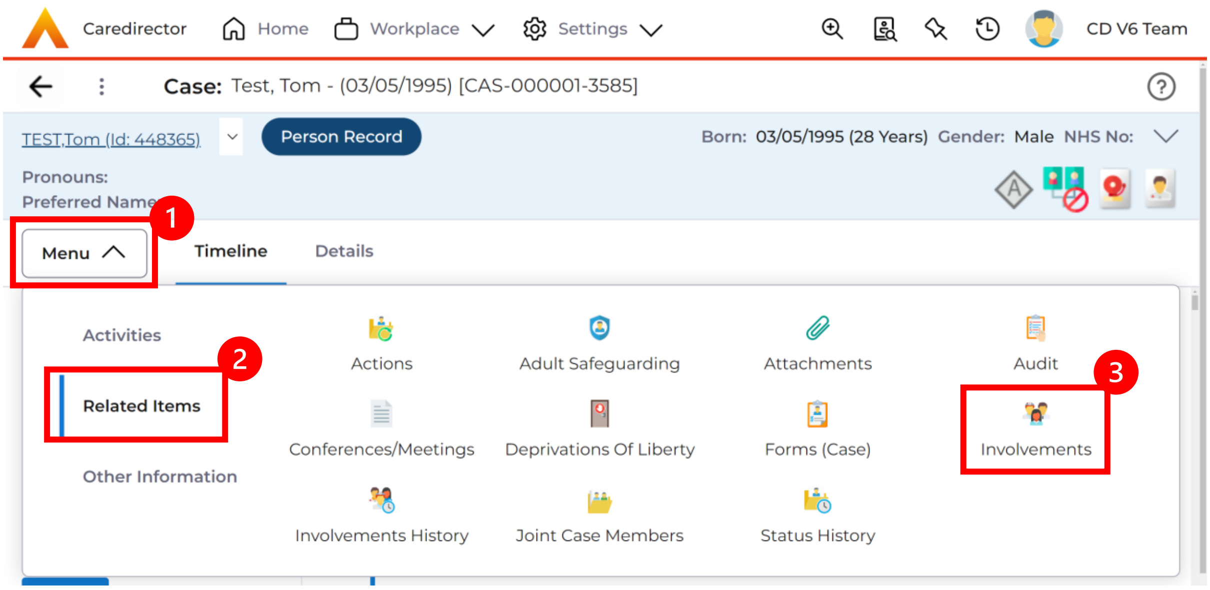
8. **Details** will also show who is the responsible user and responsible team. Due to the reason that this **Case** showed in your **Home Screen** dashboard under **Case Involvement** this will mean that you are the **Responsible User** for this case.



   a. An alternative way of finding this information is by expanding the **person banner** to show the **Case** responsible user/ team as well as their current address and contact information.



9. If this was under the **Secondary User** widget, then your name will appear: **Menu > Related Information > Involvements**



Case Record

From this **Case Record** you will be responsible for updating and creating **Activities** and **Forms** to show the journey of the person and display what is currently happening.

Activities

1. To create an **Activity,** select **Menu > Activities** then select the appropriate activity. These are what each mean:

    a. **Appointments**: Fill out any appointments yourself or a professional has undergone or going to take.

    b. **Case Notes**: To note an event or action that requires recording on this case. (This generally means something that does not need further actioning).

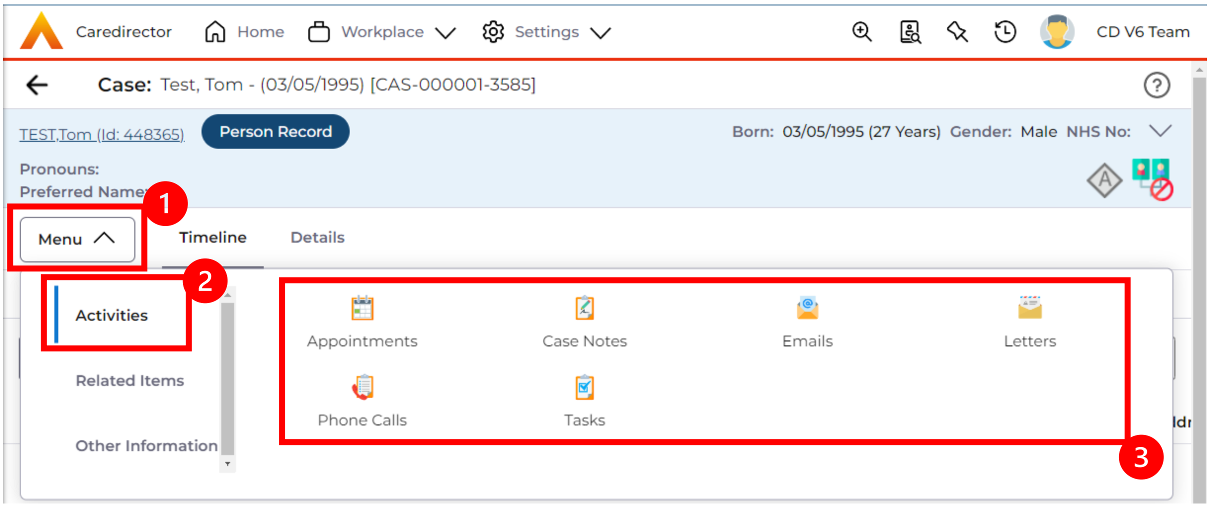
    c. **Emails**: Any emails that have been sent to you regarding this person and states advancement and relevance to be recorded.

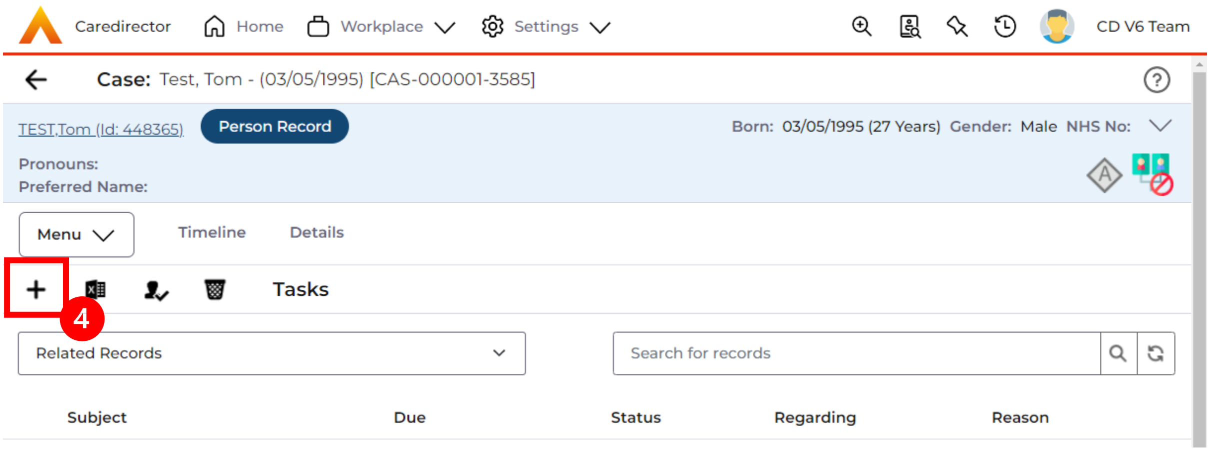
    d. **Letters**: Any letters that have been sent regarding the case and this can be uploaded and attached to this activity.

    e. **Phone Calls**: Any phone calls undertaken with this person or relevant people that can be transcribed onto Caredirector.

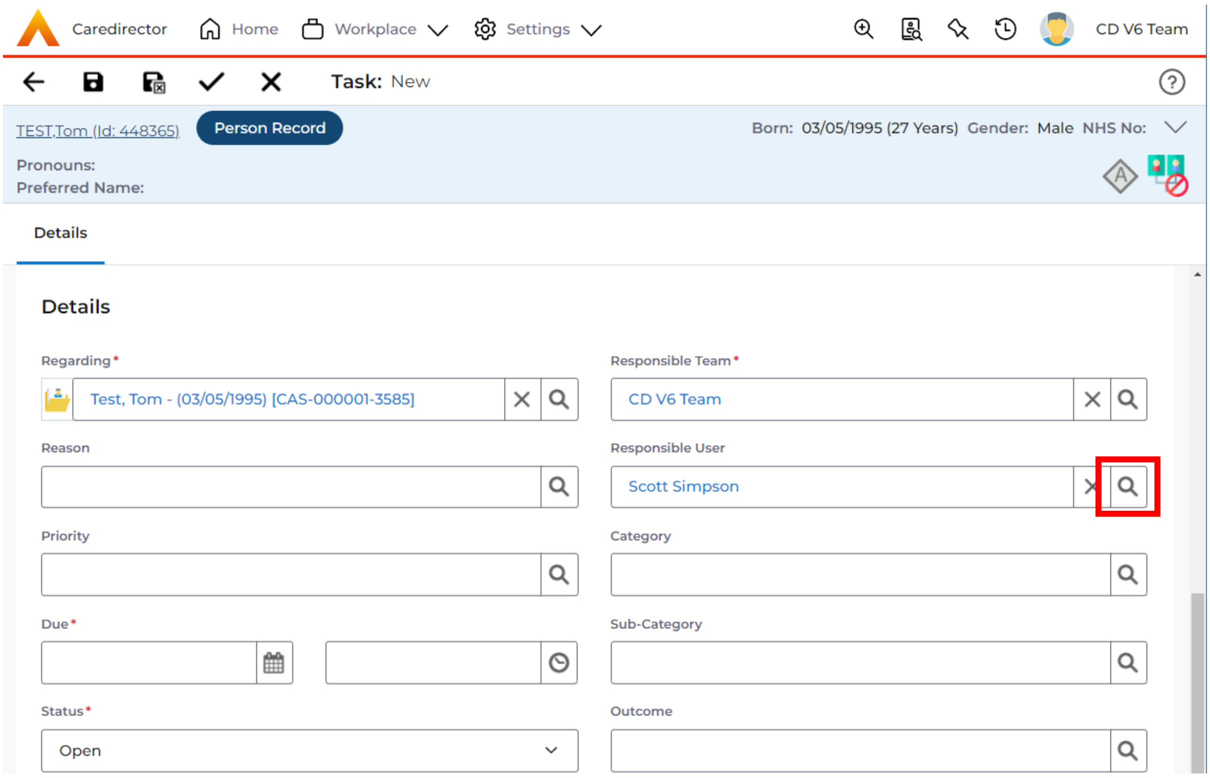
    f. **Tasks**: Anything that requires further actioning, this can be used to send activities to and from other system users on Caredirector.

2. Please use the relevant activity to record the required information. To create a new activity, select the activity and select **Create New Record** from the toolbar.

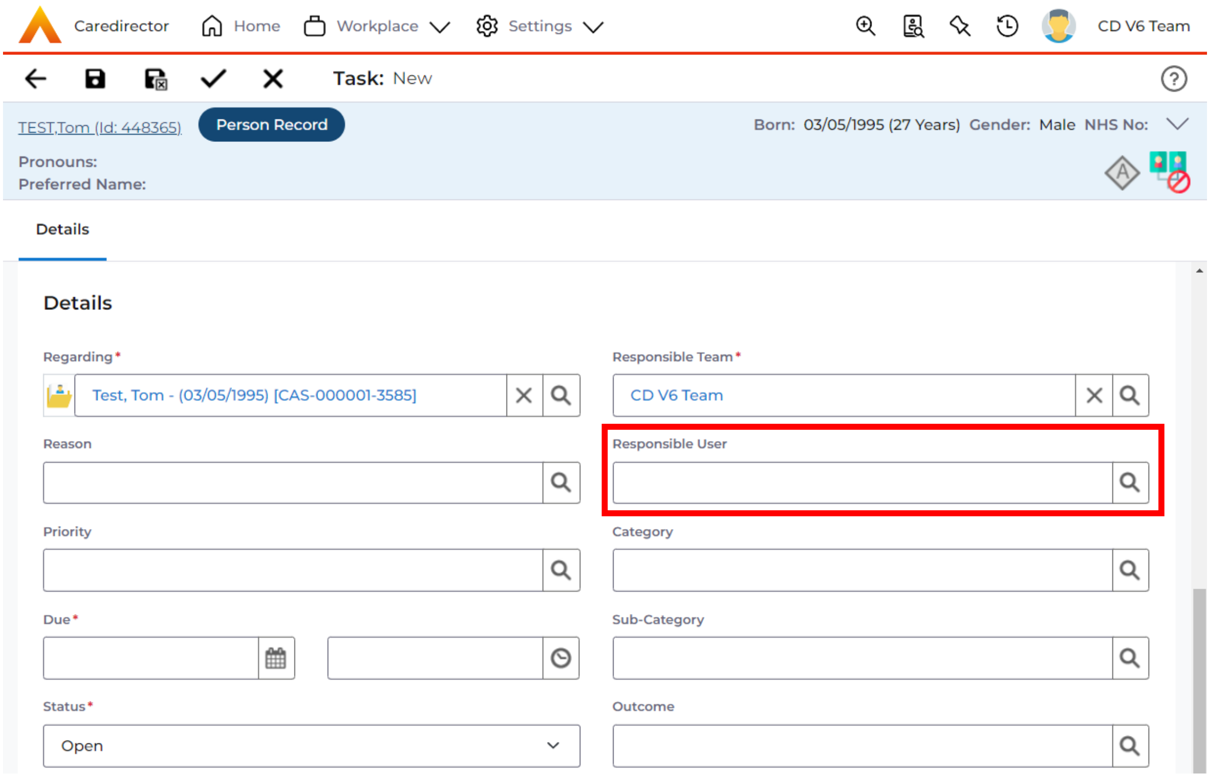

Caredirector
Home
Workplace
Settings
CD V6 Team
Case: Test, Tom - (03/05/1995) [CAS-000001-3585]
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
1
Menu
Timeline
Details
2
Activities
Related Items
Other Information
Appointments
Case Notes
Emails
Letters
Phone Calls
Tasks
3


Caredirector
Home
Workplace
Settings
CD V6 Team
Case: Test, Tom - (03/05/1995) [CAS-000001-3585]
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Menu
Timeline
Details
Tasks
4
Related Records
Search for records
Subject
Due
Status
Regarding
Reason

3. Allocating an activity to the appropriate person is crucial when there is a specific action required. By assigning it to the correct individual on Caredirector, it will be visible in their "My Activities" or "Team Activities" section for them to address. The initial step in this process is changing the responsible user to the desired person using the Lookup Function. This allows for seamless assignment and ensures that

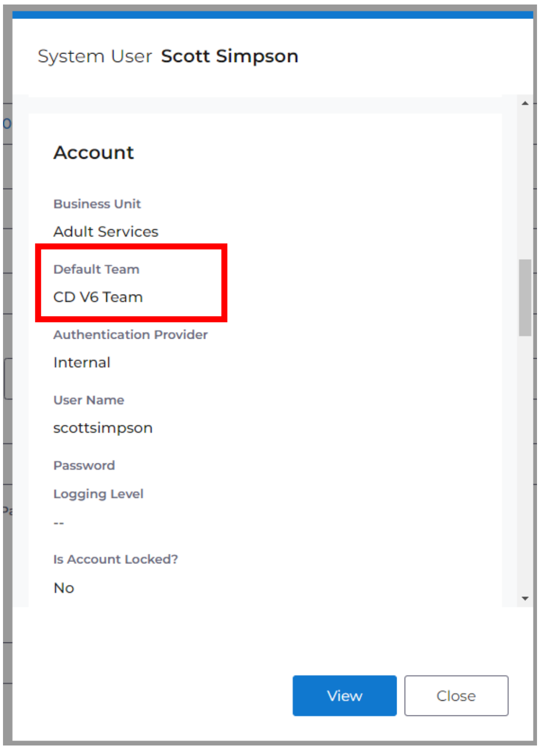


4. However, if that person is not known, select the **X** and leave blank and instead just focus on the **Responsible Team**.

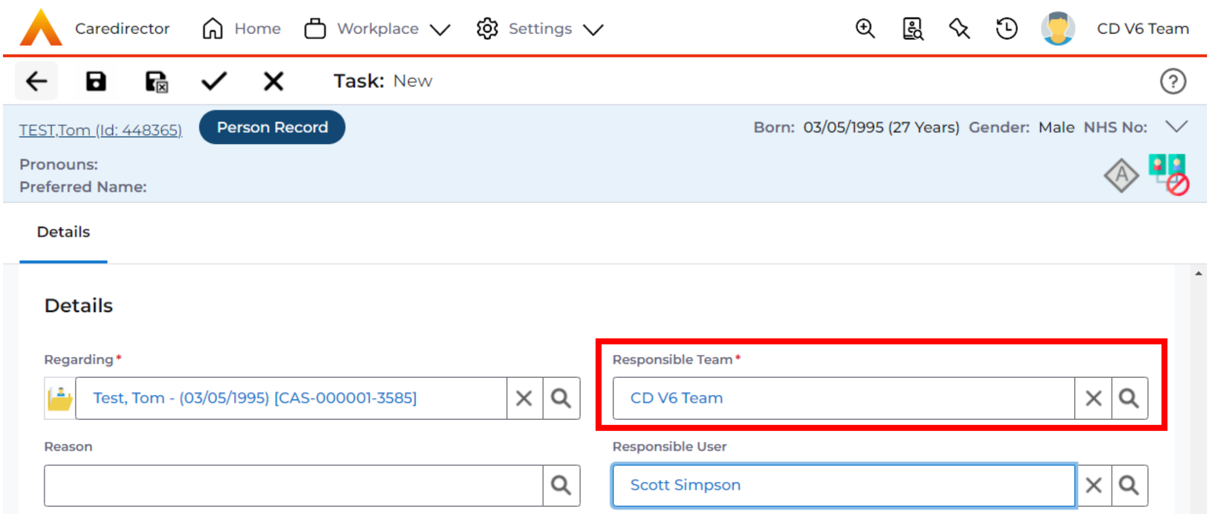


5. If you do know, who this is going to be sent to, but you do not know what team they are part of. A quick way of checking is to select their name (it should be in blue).

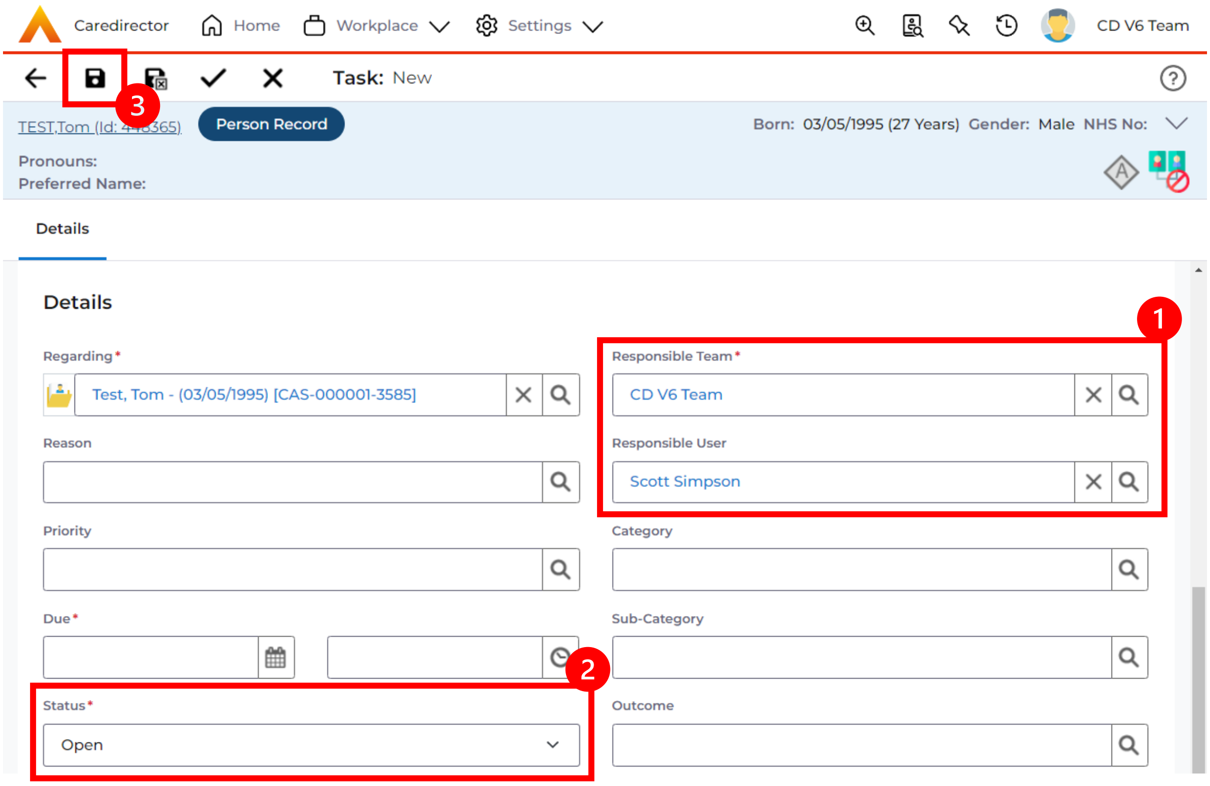
6. Once clicked, it will show their system user profile and most importantly, their default team.



7. Use that information, to input the mandatory field **Responsible Team**.

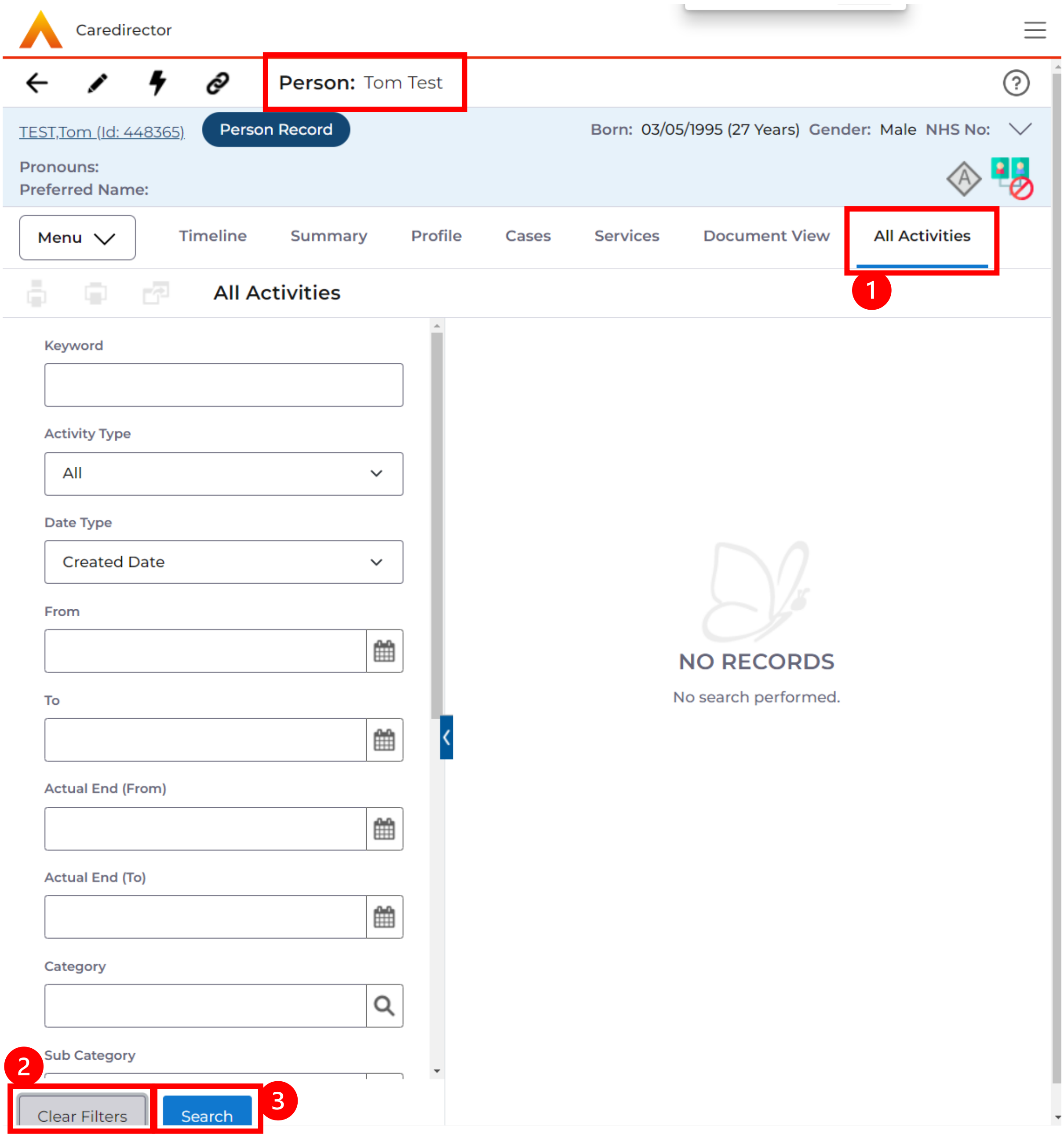


8. Once the system knows who and which team you want to send it to, leave the **Status** as **Open**. If it is set as **Completed** then it will just stay where you put it but will not show on the person/ teams dashboard. Then select **Save.**



9. Anything that you will need to do will pop up on your dashboard.

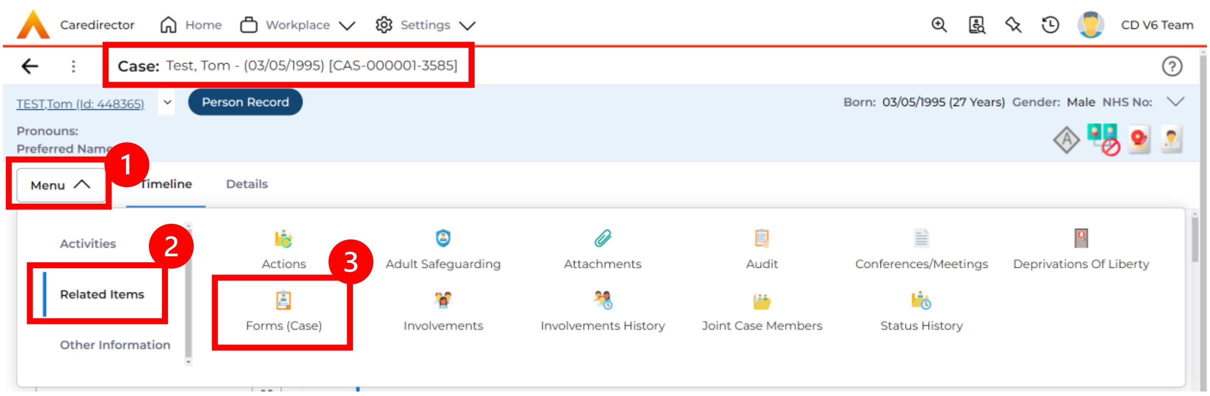
10. There may be times where you need to view all activities. This is useful if you want to see a clear picture of everything and that person's journey. To do this, go to **Person Record > All Activities > Clear Filters > Search**



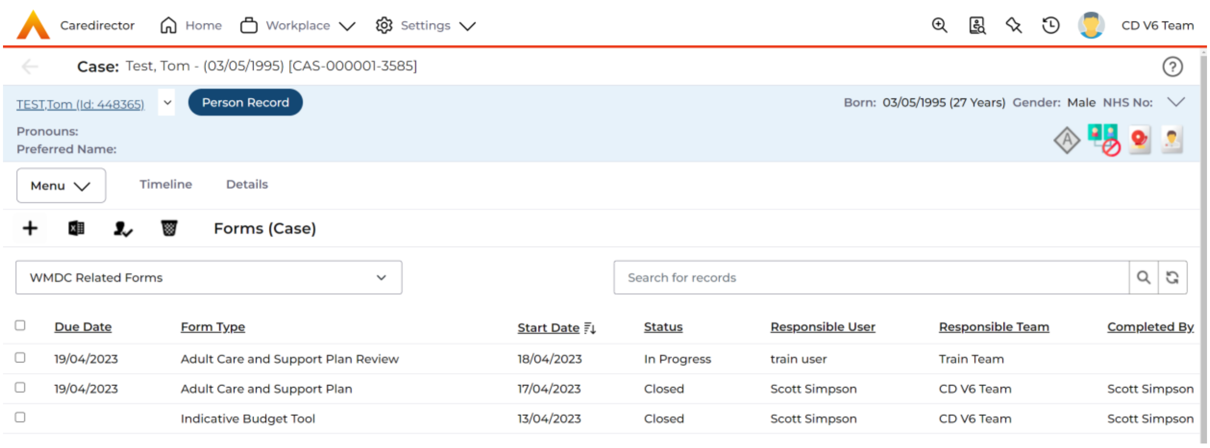
Forms (Case)

1. This section specifically addresses forms within Caredirector and provides guidance on various considerations when working with them. The Form guide contains detailed information on creating, editing, and cloning form data. It is a valuable resource for understanding the specific functionalities and processes related to forms within Caredirector.

2. Forms are created in a **Case Record**. This is where you go to create a **Form**. **Case Record > Menu > Related Items > Forms (Case)**

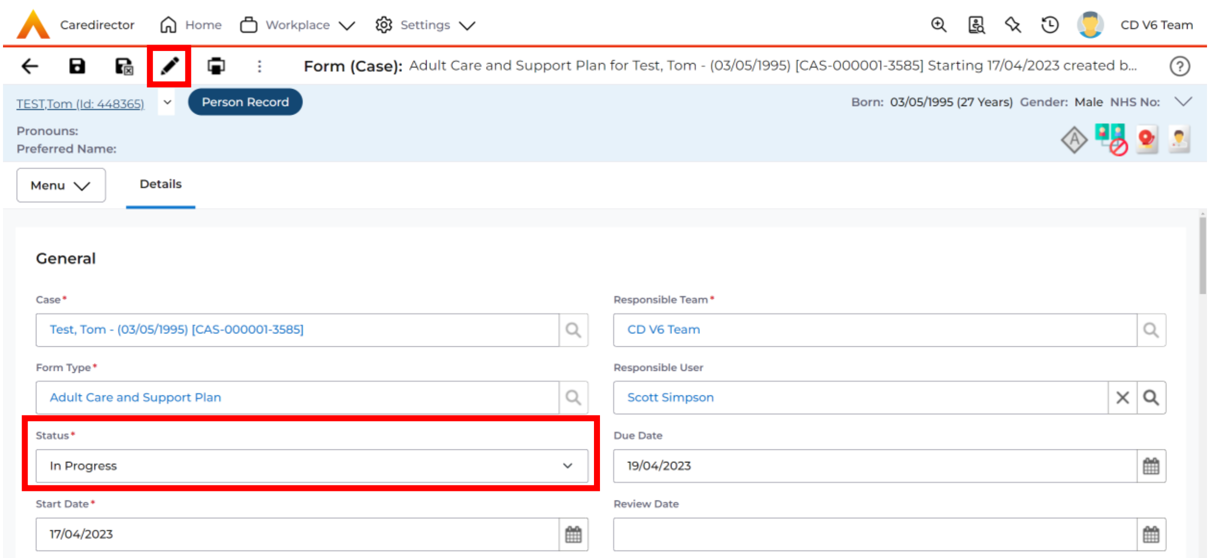


3. Once selected, it will give a list of current forms that have already been created on this case and the ability to create a new one.

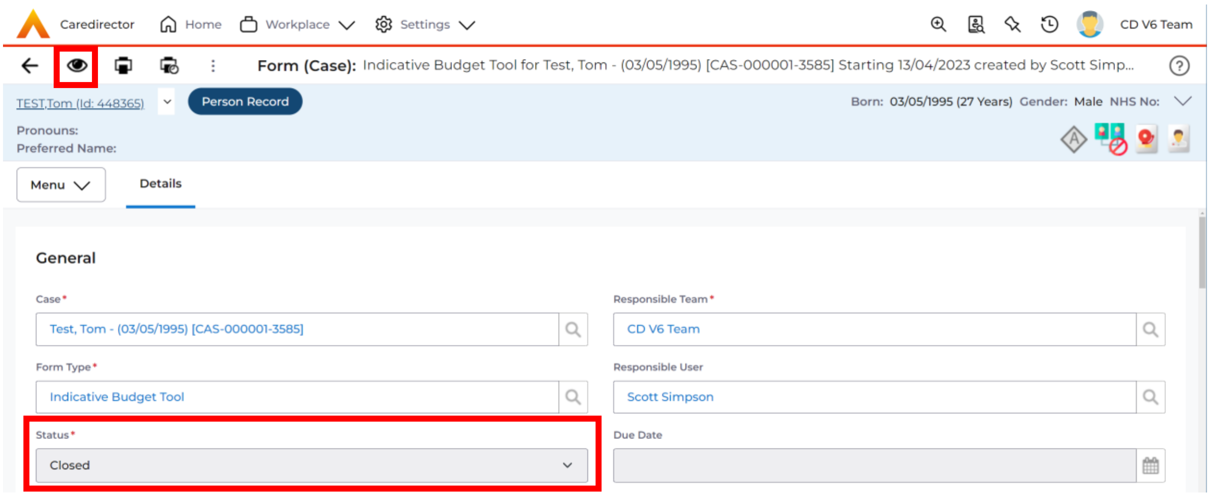


a. If a form has already been created, you can view and edit the form by selecting the **Pencil Icon (Edit)** which is available whilst the form is set as **In Progress** or to view the form use the **Eye Icon (View Only)** which is available whilst the form is set as **Closed**.

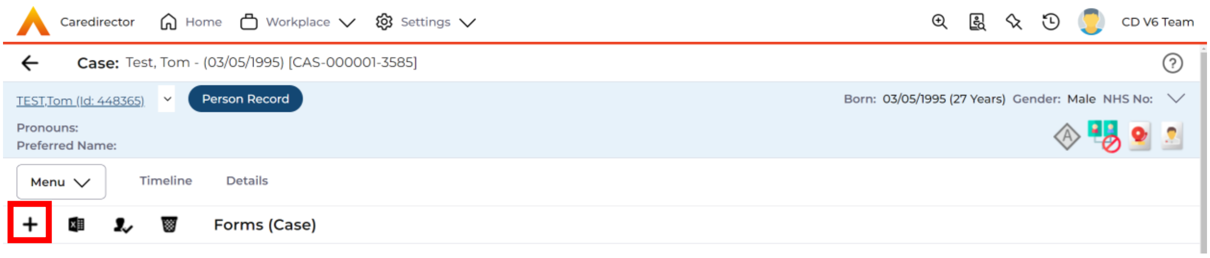
Pencil Icon (Edit)



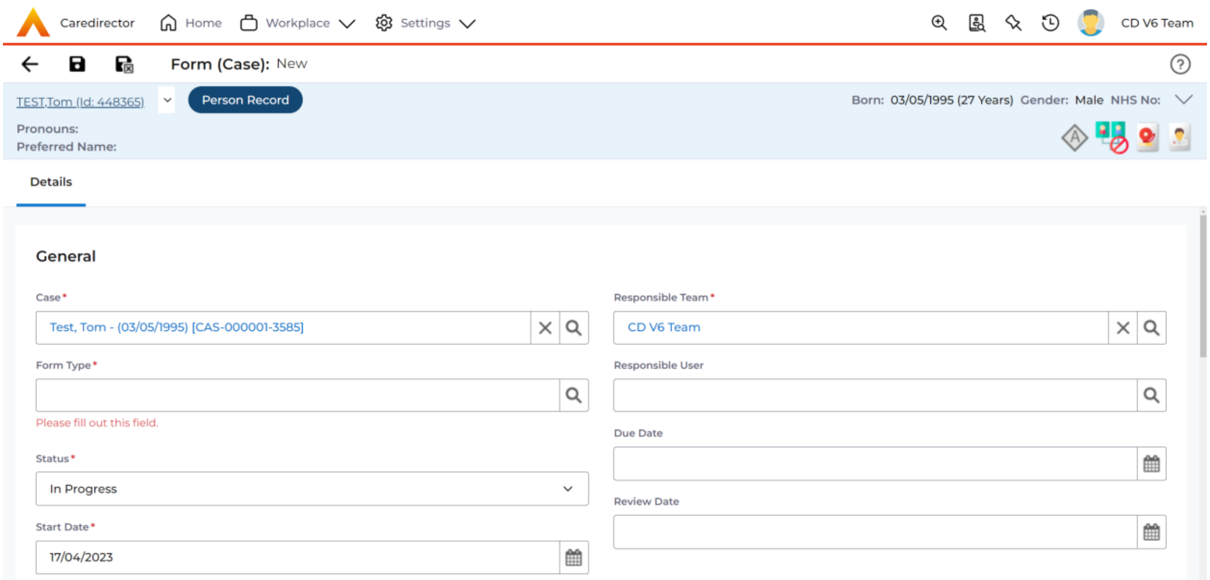
Eye Icon (View Only)



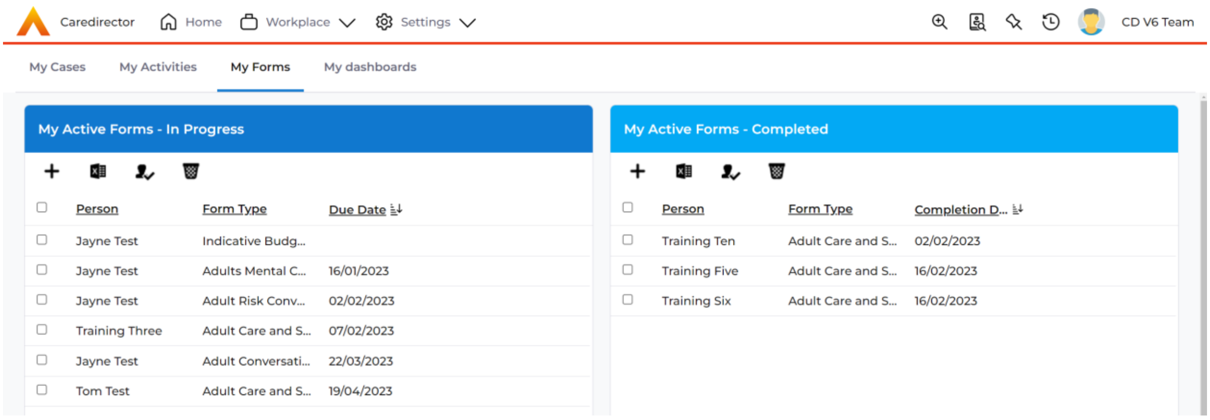
b. To create a new form, select **Create New Record** on the **toolbar.** Please note: For the majority of forms, you cannot create two of the same form whilst the **Status** is set as **In Progress** or **Complete,** they must be **Closed**.



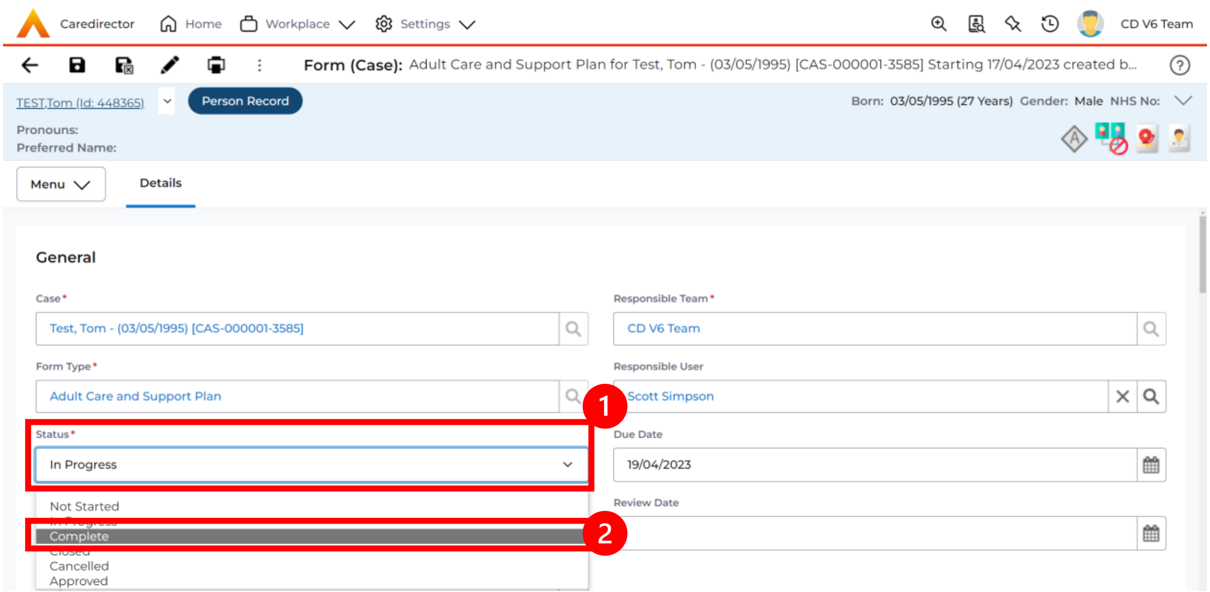
4. Once the form creation screen is open, we need to tell Caredirector what form is going to be created and who is responsible for it. Select the **Form Type** using the **Lookup Function** and the **Responsible User**. Select **Save** and you will notice the **Pencil Icon** will appear.



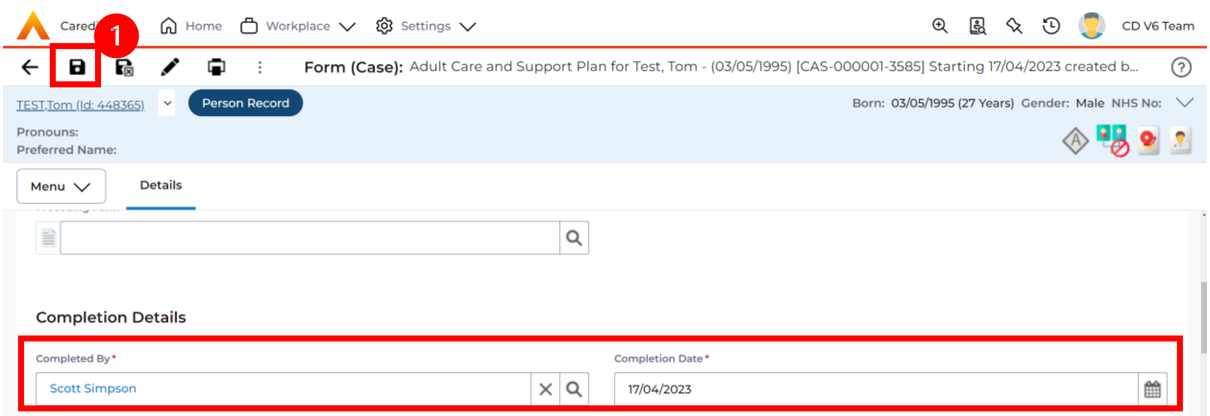
a. If the responsible user is a practitioner, then it will show under the **My Forms** dashboard on the **Home screen.**



5. Once a form has been created, edited and all the information inputted, it will need to be set to complete. To do this:
Forms (Case) > Open Form > Status > Complete and press save.



6. If the form requires closure from manager, the form will become visible on the managers home screen for them to **Close**, if not then the form will automatically close.



Indicative Budget Tool Form

The allocation of a clear upfront indicative (or 'ball-park') budget at the start of the planning process will help people to develop the plan and make appropriate choices over how their needs are met. You must inform the individual that this amount may change depending on the agreed outcomes in meeting needs and the individual's financial contribution, with the potential of the support plan being £0 costing.

1. The indicative Budget tool is on Caredirector can be found within Forms (Case).

2. The Indicative Budget tool is flexible and accessible to allow practitioners to use on different assessment interventions and visits via Work Smart Phones.

3. The indicative budget is based on The Care Acts National Eligibility Criteria outcomes. This requires practitioners to use their professional judgement in assessing the severity of the eligible needs and the impact on wellbeing (with amalgamated guidance). Practitioner's professional judgement will be quality assured by Team managers through the recorded assessment intervention (Conversations Record or Interim and/or Support Plan).

4. The new costing formulas will create a unique banding amount based on individual's needs.

5. The Indicative Budget Tool is not to be used to identify the final personal budget amount it is only to be used to inform the support planning process.

Client Level Data

Purpose & Forms

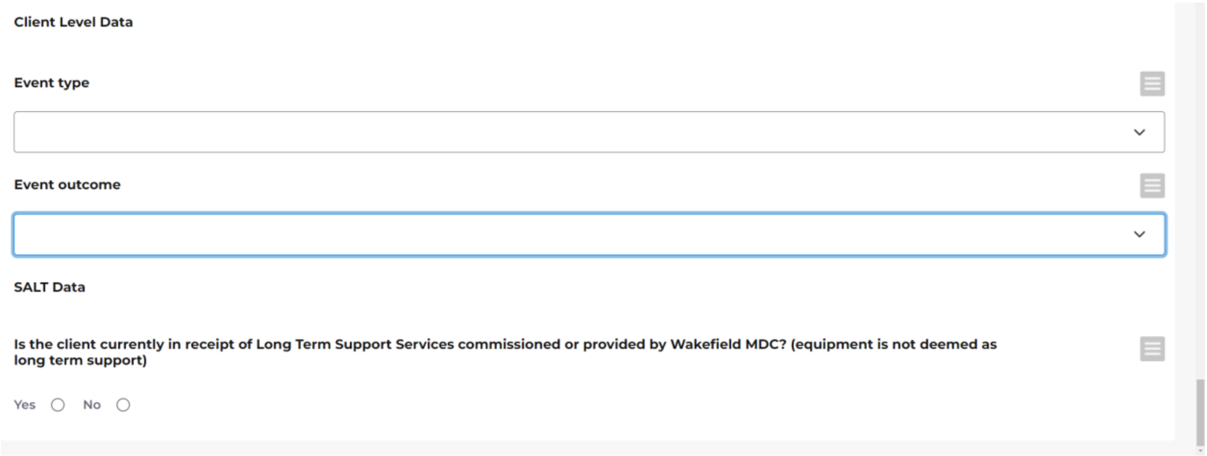
1. The new Client Level Dataset is a key project in the journey to transforming adult social care data. The new mandatory data collection will provide more timely, detailed data and will, for the first time, enable linked health and social care data, plugging the gaps in our knowledge of how people move between health and social care, how they experience these transitions and the resulting care outcomes. The data collection will enable timely monitoring of demand and, also the provider market. This will be vital over the coming year when economic pressures are likely to impact both.

2. CLD contains details of the main events and interventions in an adult's journey through the Social Care system when they approach us as a Local Authority for funded care. It will be possible to assess differences in demand and service use by age, gender and ethnicity and describe variations in costs by provider and service type. The new data collection is mandatory from 1st April 2023 with our first submission due July 23.

3. The CLD specification contains 50 data fields, 33 of which are mandatory from April 2023 and made up of the data required to reproduce key ASC activity statistics currently reported via the SALT return, which CLD will supersede in 2025.

4. These are the **Forms** that **Client Level Data** has been introduced in.
    a. Adult Interim Support Plan
    b. Carers Support Plan Review
    c. Adult Conversation Record
    d. Occupational Therapy Conversation Record
    e. Occupational Therapy Review
    f. Adult Care and Support Plan Review
    g. Reablement Physiotherapy Input Form
    h. Carers Conversation Record
    i. Occupational Therapy Referral (Secondary Allocation)
    j. Sensory Impairment Referral (Secondary Allocation)
    k. Referral for Reablement – Outreach/Discharge Support

5. Underneath **Office Use Only** section is where this section is held.



Client Level Data

Event type

Event outcome

SALT Data

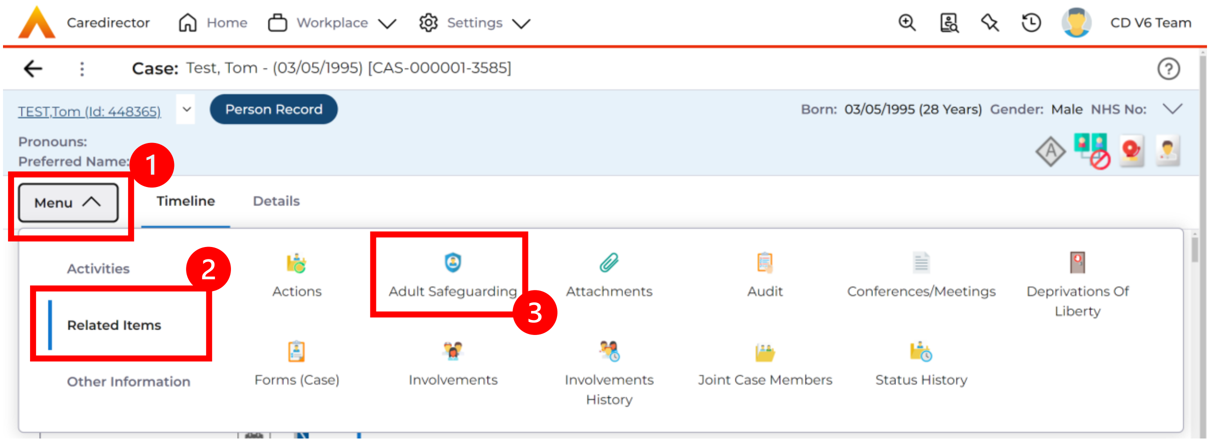
Is the client currently in receipt of Long Term Support Services commissioned or provided by Wakefield MDC? (equipment is not deemed as long term support)

Yes ○ No ○

6. To find more information about "Client Level Set Data," you can go to TriX and perform a search using that term. TriX is a resource that provides additional documentation and guidance on various topics related to the system. By searching for "Client Level Set Data," you should be able to access relevant materials and resources related to that topic.

Safeguarding Information

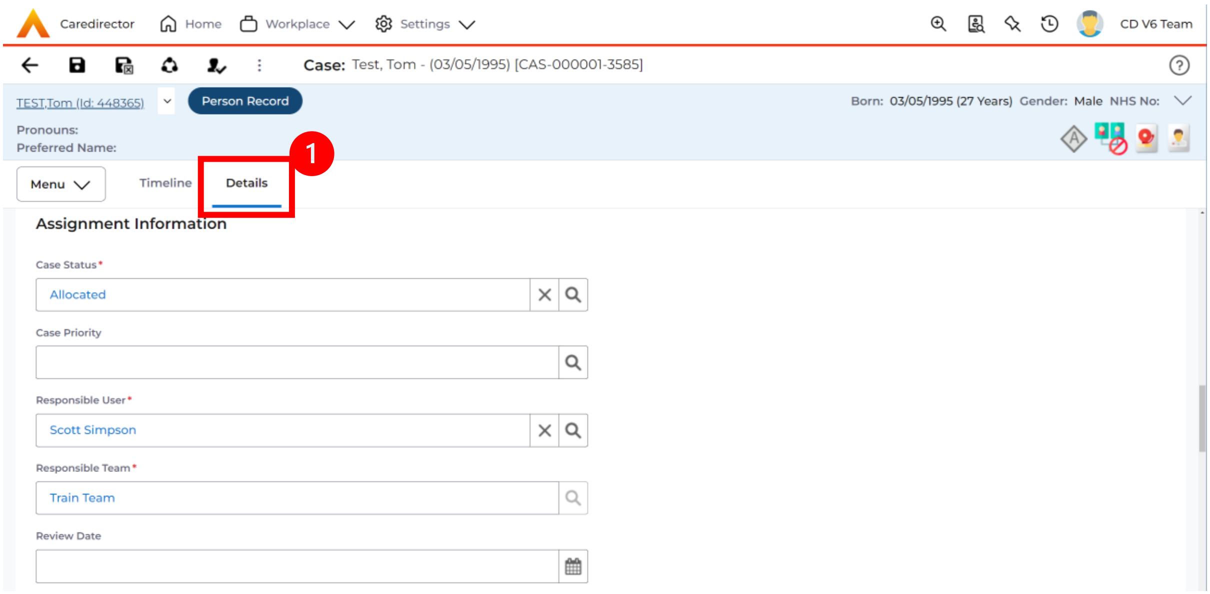
1. Having knowledge of the location where safeguarding information is stored is crucial when dealing with mental health or safeguarding cases. It ensures that relevant information can be accessed and utilized appropriately. To find this: **Case Record > Menu > Related Items > Adult Safeguarding**



2. From this point, you have two options: you can either create a new entry or review an existing one. Choose the appropriate action based on your needs and requirements.

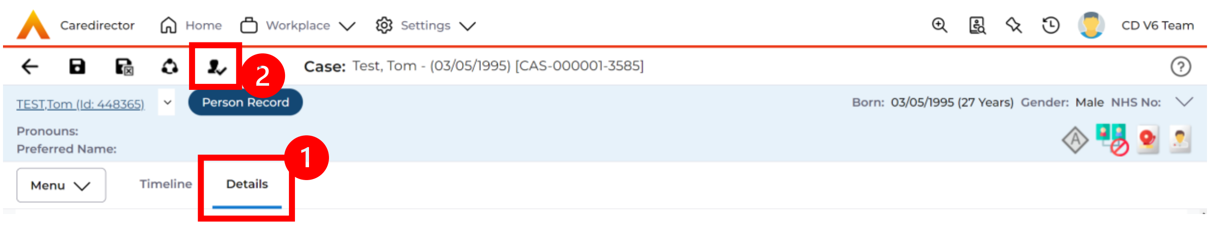
Transfer Requests

1. Transfer requests can happen if a case requires to be sent to another team to continue work. This can happen for a variety of reasons however, to do this – the **Responsible Team/ Responsible User** requires changing. To find this go to: **Case Record > Details > Assignment Information**.

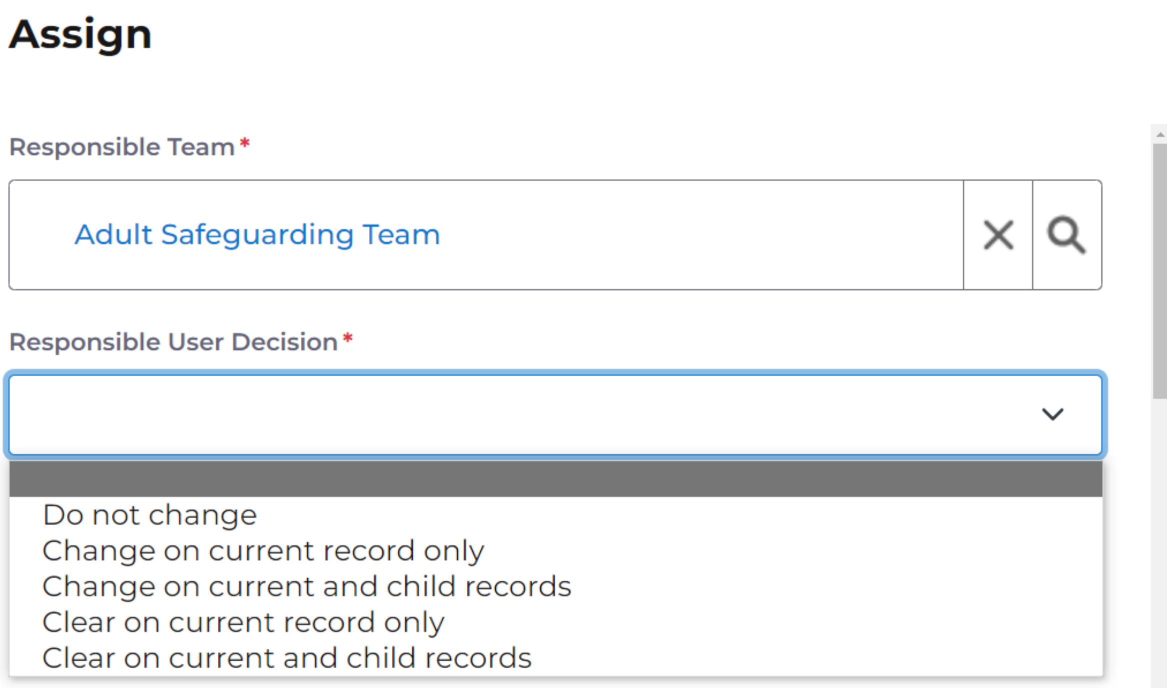


2. If you have been actively working on the case, your name will be listed in the Responsible User field along with your team in the Responsible Team field. Please note that the Lookup function will be disabled (greyed out) for the Responsible Team field but not for the Responsible User field. This indicates that changing the Responsible User to another team member within the same team is a straightforward process.

3. However, changing the Responsible Team requires a slightly different approach and additional steps to be taken.Go to
Case Record > Details > Assign this record to another team



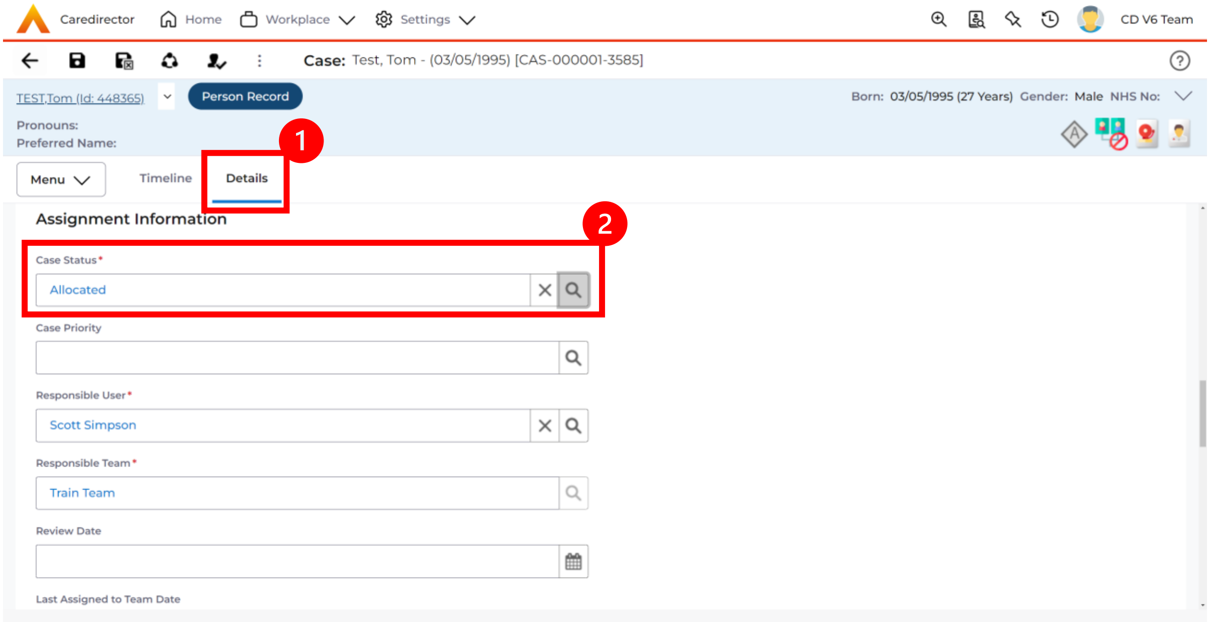
4. When selected, it will bring up **Responsible Team** option to change. Choose the relevant team by selecting, changing the **Look In** to **Lookup View** and select from the list. The **Responsible User Decision** works in two parts, if you know who this is being transferred to and if you do not know who it is being transferred to.
    a. If you do know: select **Change on Current Record Only** and enter their name in the new field.
    b. If you do not know: select **Clear on Current Record Only**



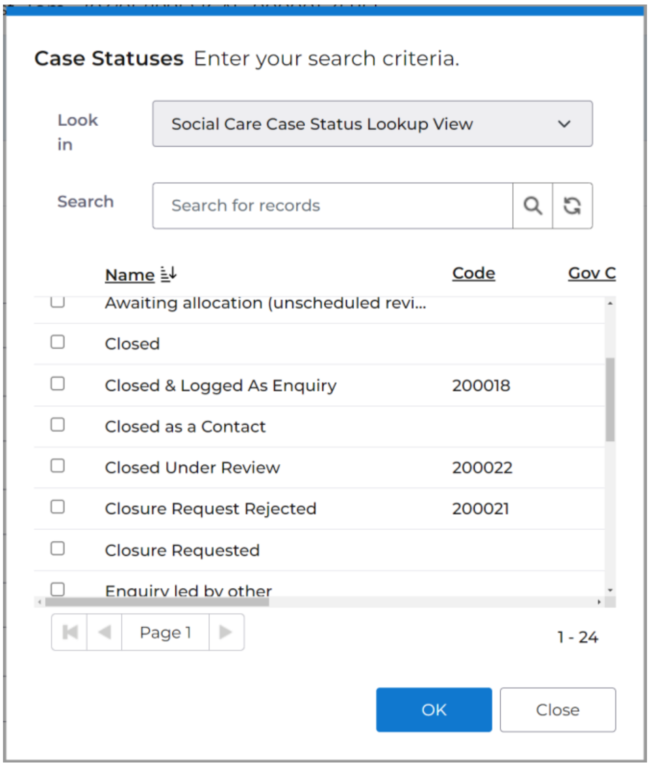
5. Select **Save** and once done, this will now automatically change the **Assignment Information** to the new **Responsible Team/ Responsible User** (if selected).

Closures

1. When the **Case Record** requires closing, go to:
   Case Record > Details > Assignment Information > Case Status.



2. There are a few options to choose from inside the **Case Status**.



3. Before proceeding with the closure, it is important to perform several checks to ensure that all necessary requirements are met. Please follow these steps:

    a. Activities: Check that all activities are marked as completed. To do this, go to Menu > Activities and review each activity type to ensure they are set to the "Completed" status.

    b. Forms: Verify that all forms are closed. Go to Menu > Related Items > Forms (Case) and ensure that all forms associated with the case are marked as closed.

    c. Deprivations of Liberty: Make sure that any Deprivations of Liberty have an actual authorization end date and that the specified time has passed. Access Menu > Related Items > Deprivations of Liberty to verify this.

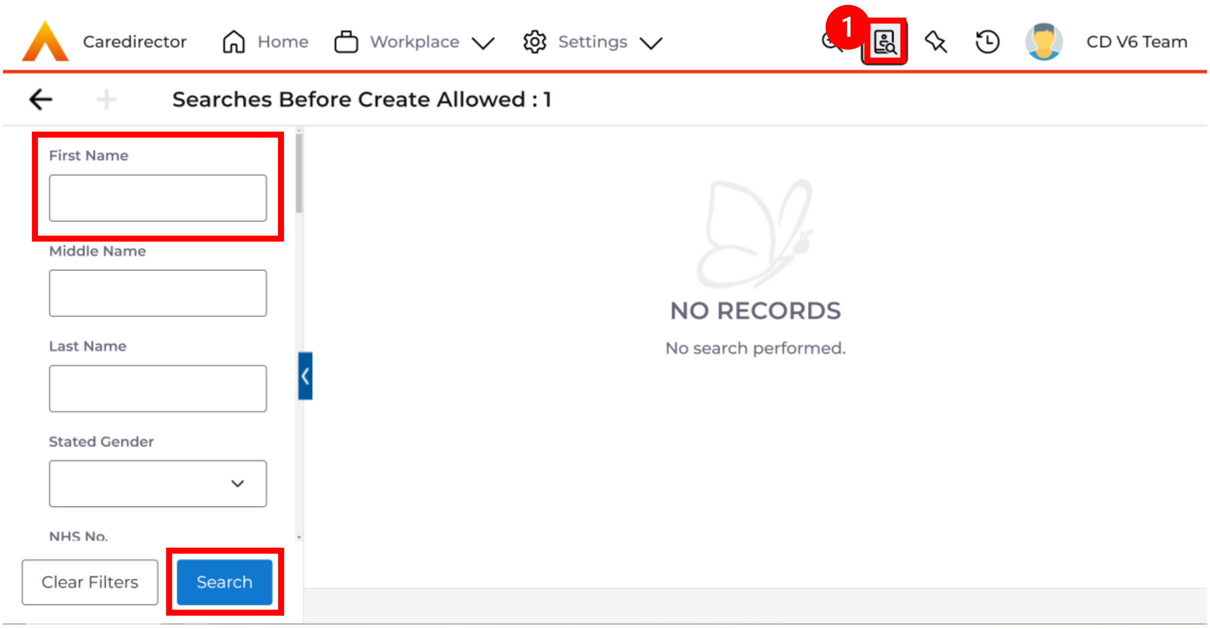
    d. Involvements: Check that all involvements have an end date and that the specified time has passed. However, note that the Responsible Team and Responsible User in the Involvements section, which match the ones in Details > Assignment Information, should not have an end date. Leave them with their respective start dates.

4. Once you have verified these areas, return to Details > Assignment Information > Case Status and change it to the relevant option. Some selections may prompt additional fields for you to review and provide a reason. After making the necessary changes, save the record, and it will be automatically sent to your manager for authorization.

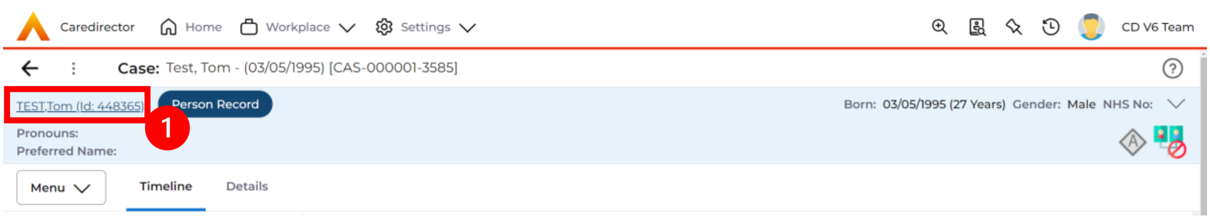
Person Record

1. The **Case Record** is the primary area where you will spend most of your time working. It encompasses all aspects related to the case, and any updates or relevant information should be documented in this section of the system. On the other hand, the Person Record contains more comprehensive information about the individual in general, providing a broader overview of their details.

2. As a reminder, to search for a person record simply, select:
   Person Search Icon > Enter their information or ID > Search



3. However, while using this booklet, you will find yourself inside the Case Record. To navigate to the Person Record, locate the blue underlined hyperlink within the Person Banner. This hyperlink is available in various records as long as it is linked to the respective person. By clicking on this hyperlink, you will be directly taken to the person record.

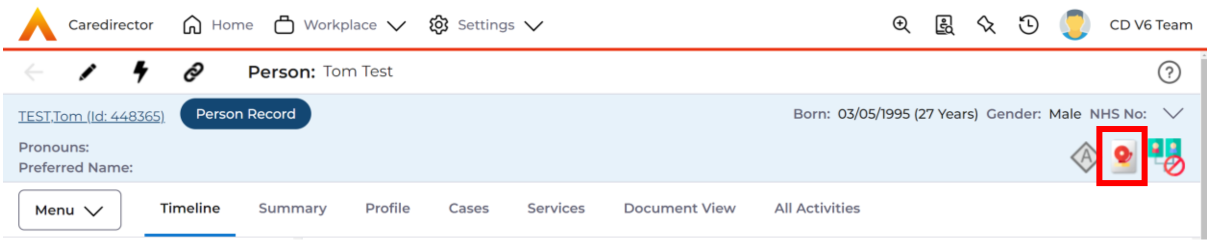


Visiting the person

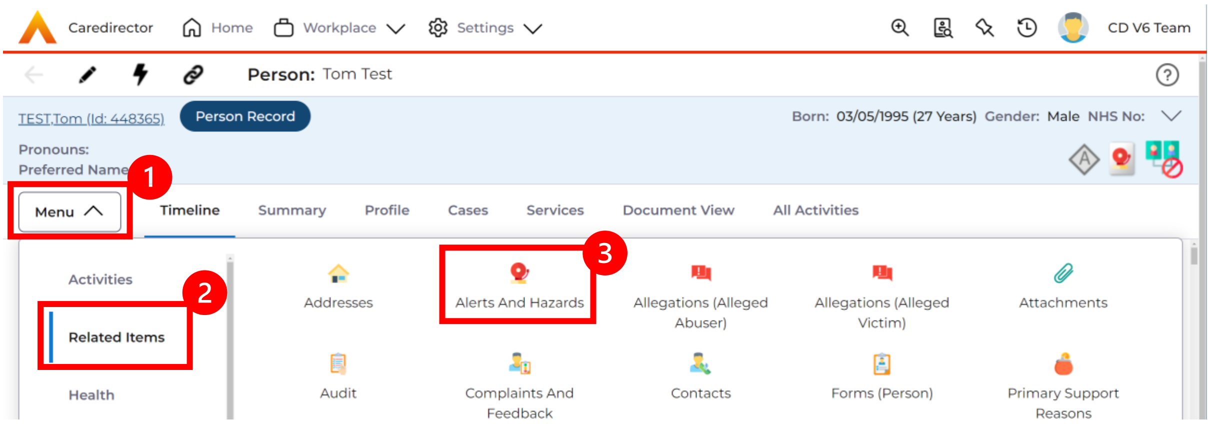
1. There are occasions where you need to visit the person. For safety and access, two areas of Caredirector focuses on keeping the practitioners safe and to gain access to the property/ facility.

Alerts and Hazards

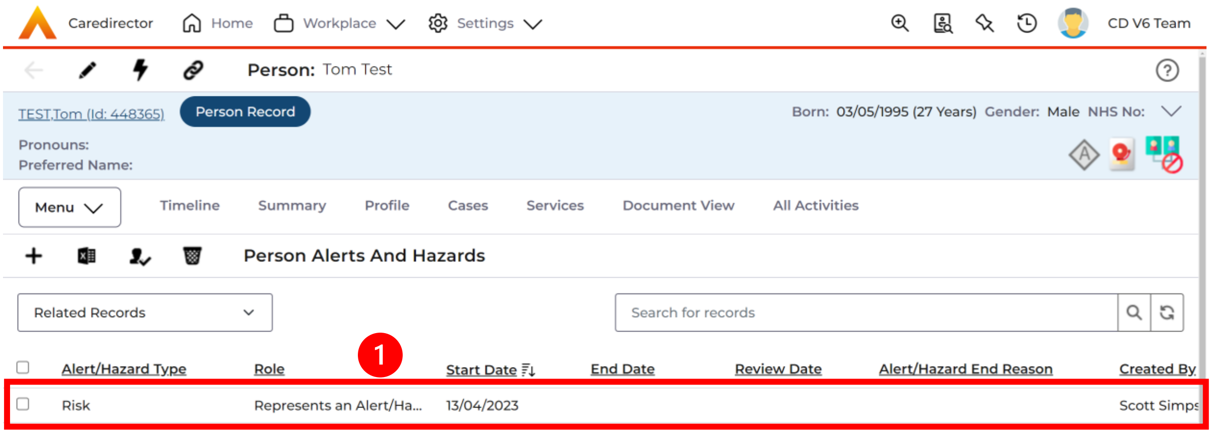
1. Alerts and Hazards are a way to keep you informed if there is a potential hazard when visiting the individual. This will be indicated by a **red bell icon** on the **Person Banner**.

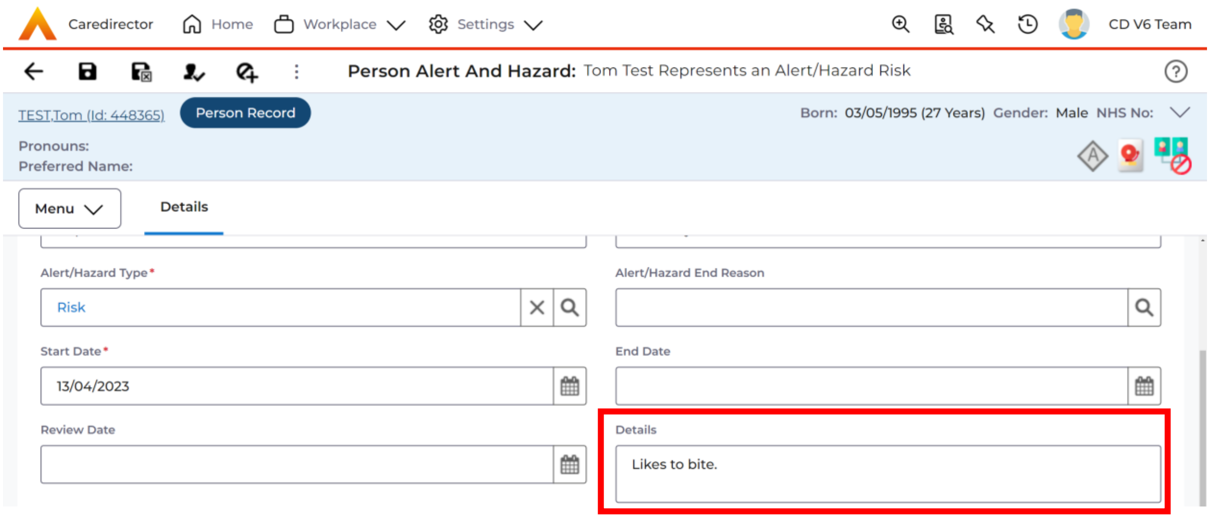


2. To access further information, go to:
   Menu > Related Items > Alerts and Hazards



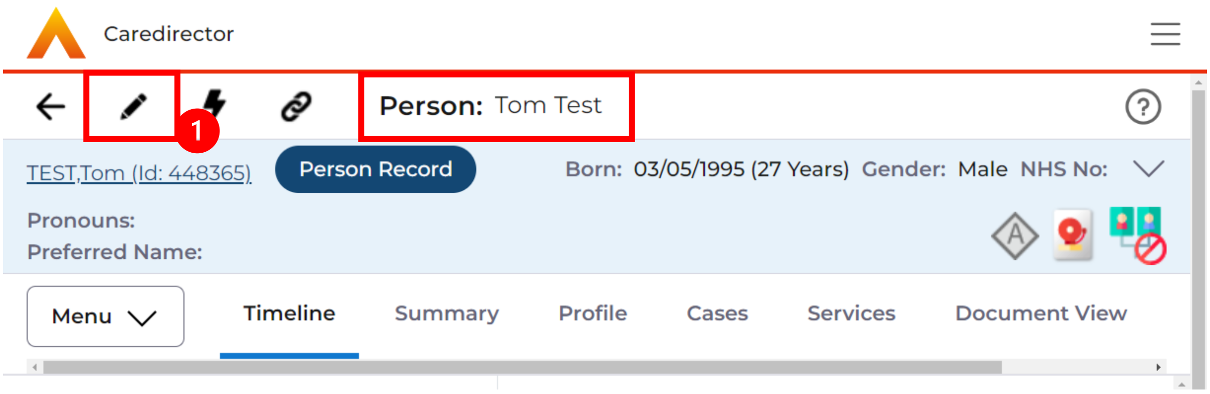
3. This will show a list of the alerts and if you click on one it will show the details.



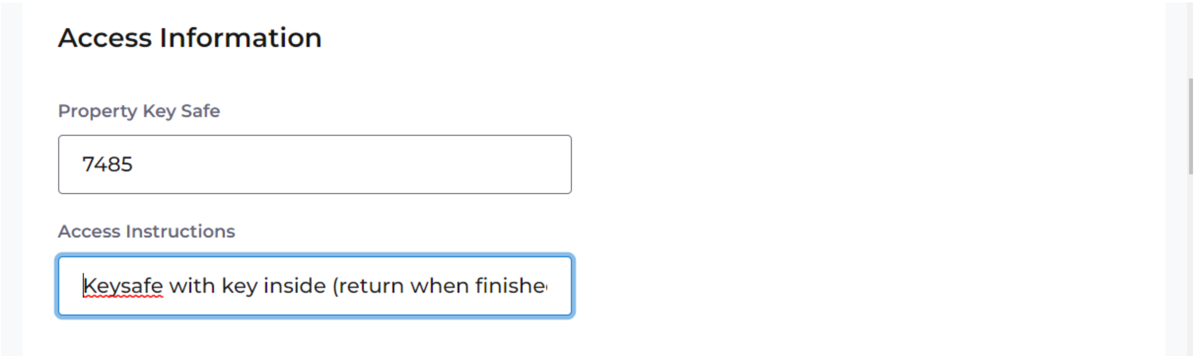


Key Safe

1. Sometimes, there may be an access code required to gain access to a property. To find this
   Person Record > Edit Button (Pencil Icon)

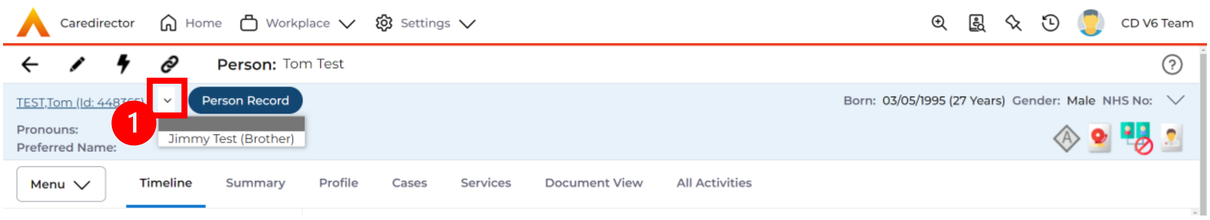


2. Scroll down until you see **Access Information**

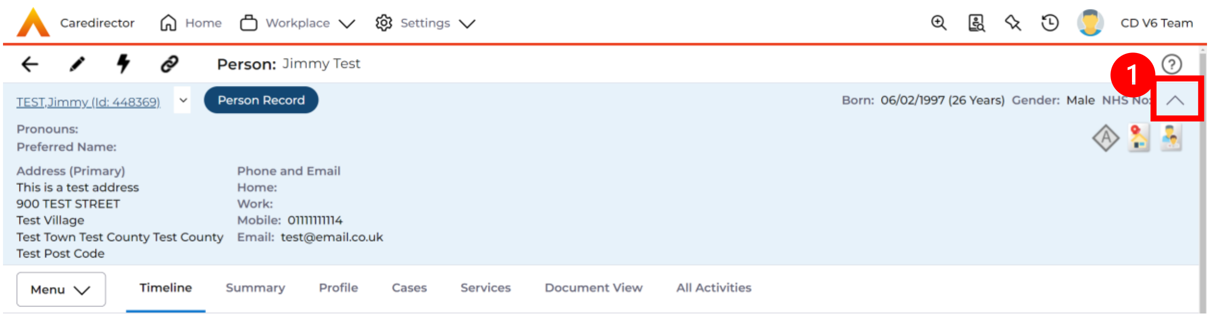


Relationships (External Contact Information)

1. There are instances when the point of contact may not be the person you are currently working on. To view the details of an external contact and their relationships, there are two methods available. However, I will demonstrate the preferred method for you. Go to:
   Person Record > Person Banner > Dropdown Arrow > Select Person



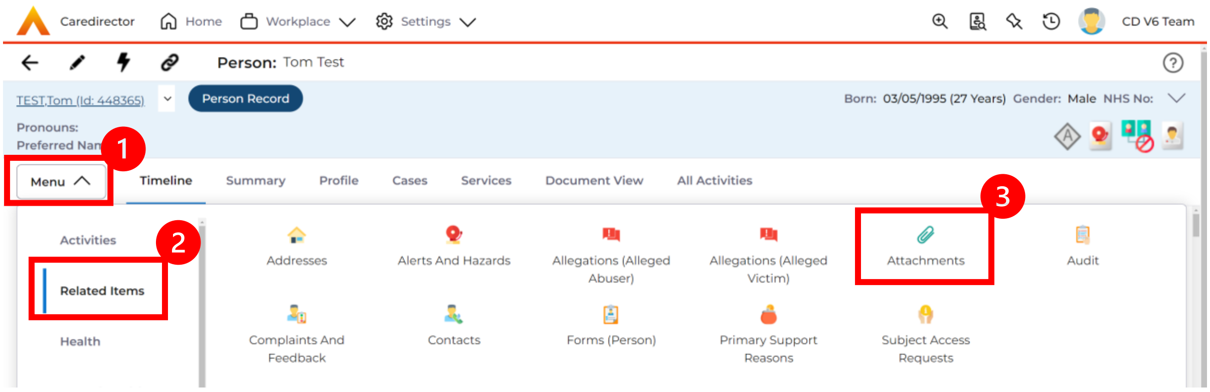
2. Once you select the other person from the dropdown list, this will navigate to the other person's record. Use the dropdown arrow to view contact information.



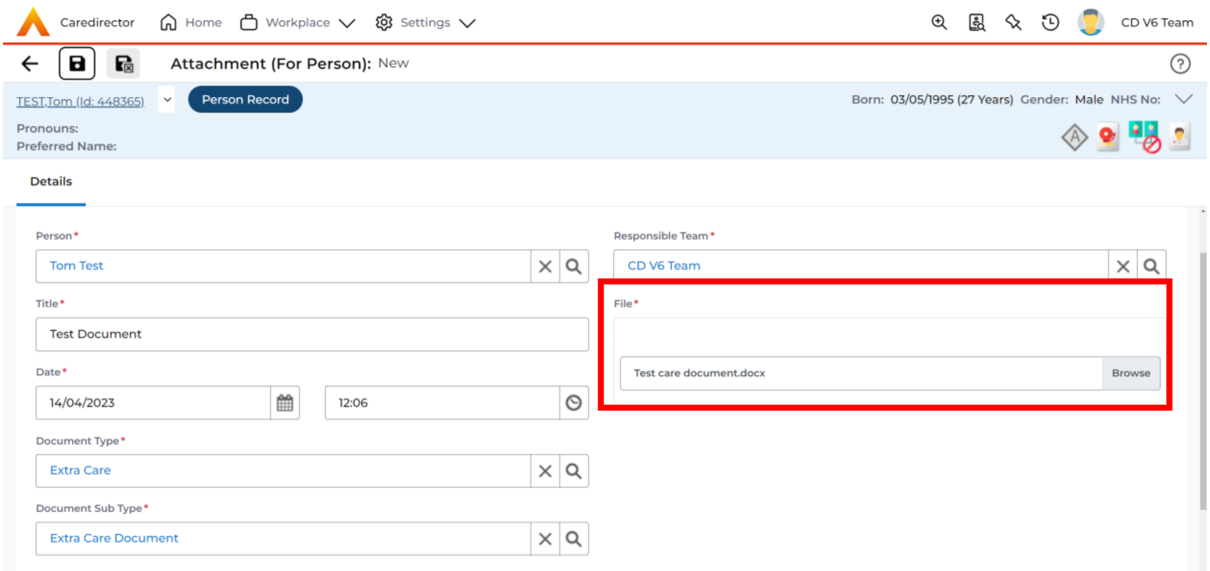
3. Use this contact information.

Attachments

1. Attachments are generally added by Admin/ CSO's but to view them go to the: **Person Record > Menu > Related Items > Attachments**

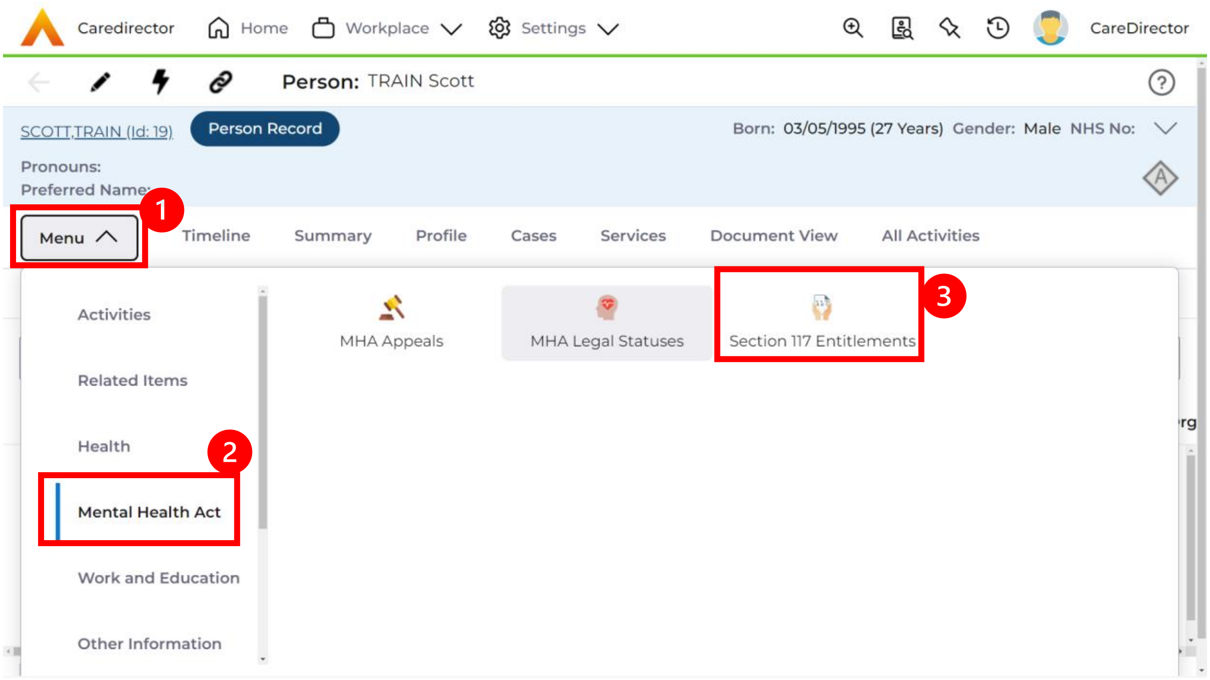


2. When opened, it will show if there are any attachments available. If there is select one, and the document to open is under the **File** field.

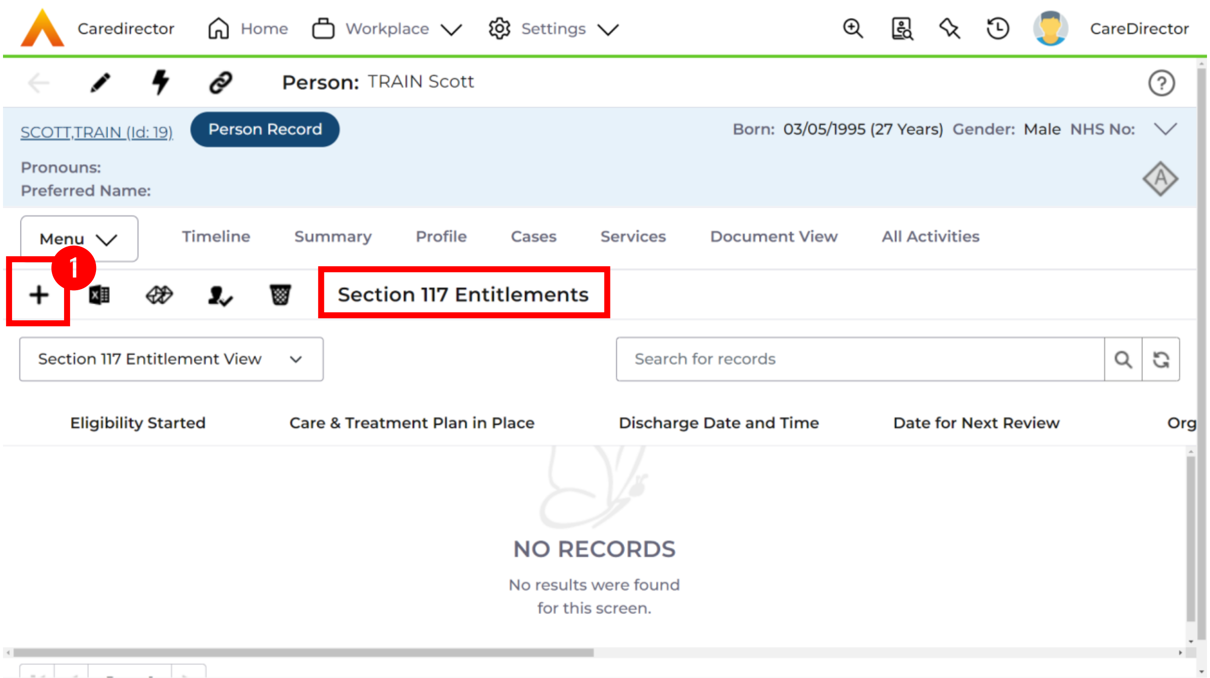


Section 117 Entitlement

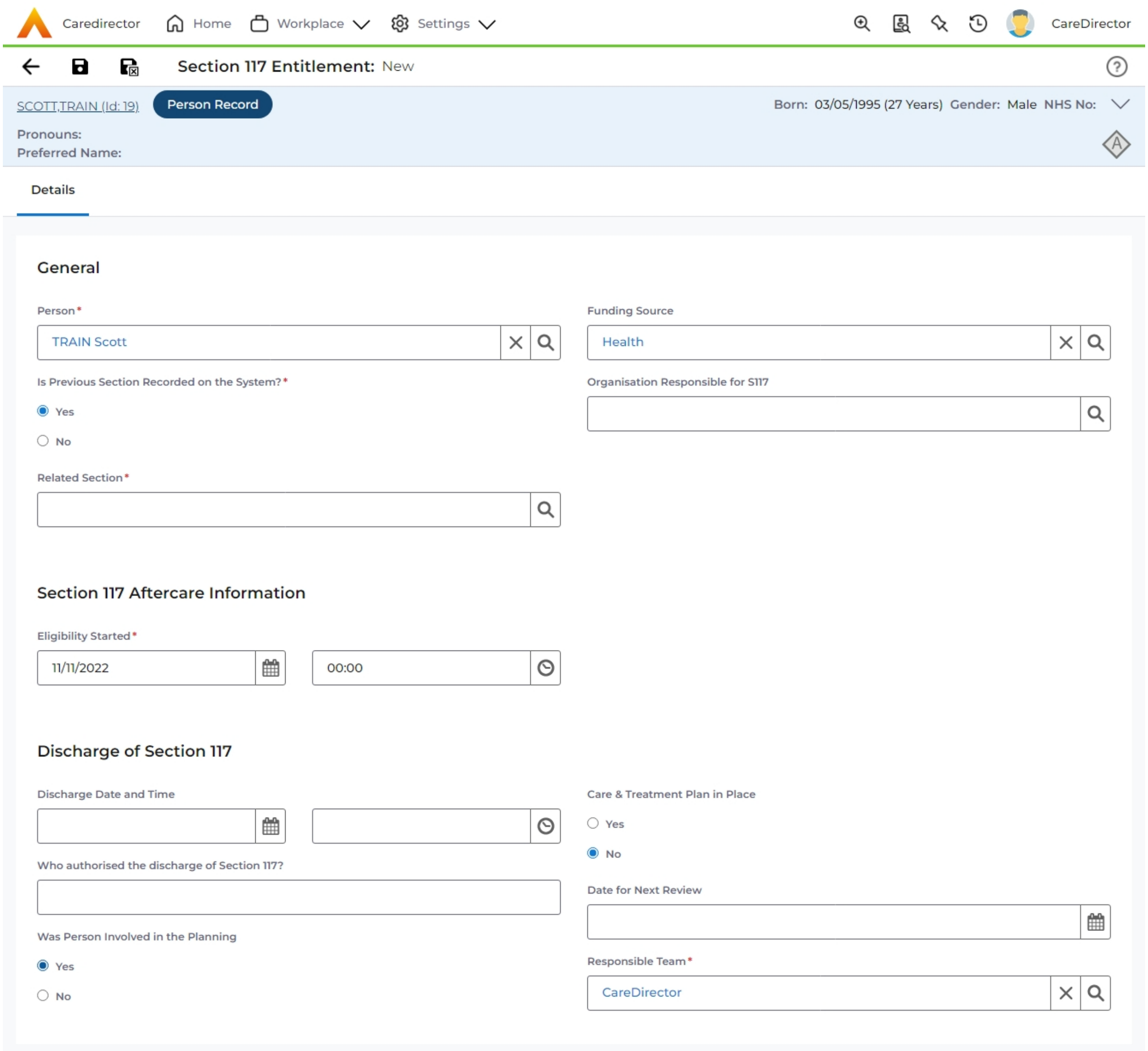
1. Locate the **Person Record**, select **Menu**, **Mental Health Act,** and then **Section 117 Entitlements**.



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

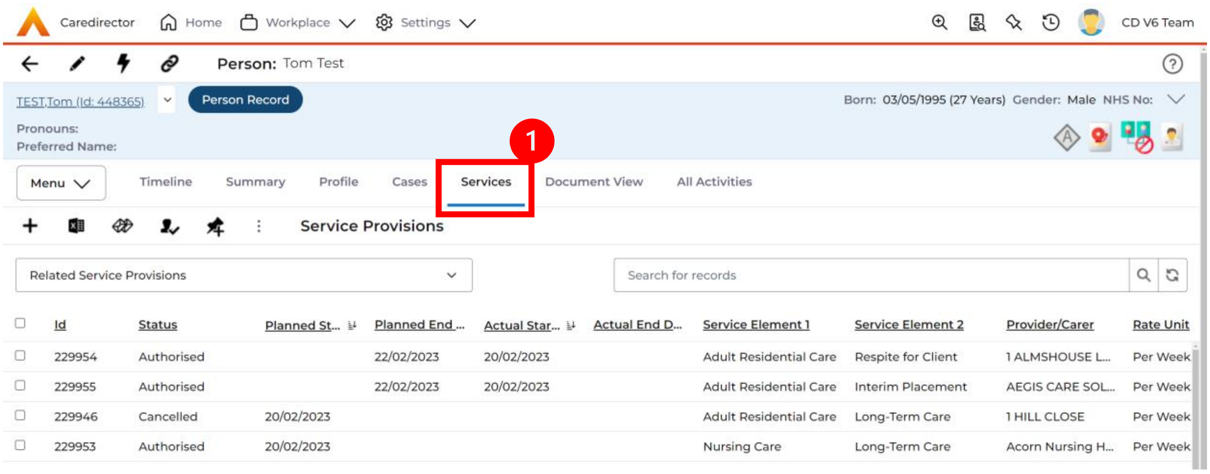


3. Fill in the relevant fields. When finished, select **Save**.
   Please note please do not fill in **Organisation Responsible for S117**.


Caredirector
Home
Workplace
Settings
CareDirector
Section 117 Entitlement: New
SCOTT,TRAIN (Id: 19)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
TRAIN Scott
Funding Source
Health
Is Previous Section Recorded on the System?*
Yes
No
Organisation Responsible for S117
Related Section*
Section 117 Aftercare Information
Eligibility Started*
11/11/2022
00:00
Discharge of Section 117
Discharge Date and Time
Care & Treatment Plan in Place
Yes
No
Who authorised the discharge of Section 117?
Date for Next Review
Was Person Involved in the Planning
Yes
No
Responsible Team*
CareDirector

Service Provisions

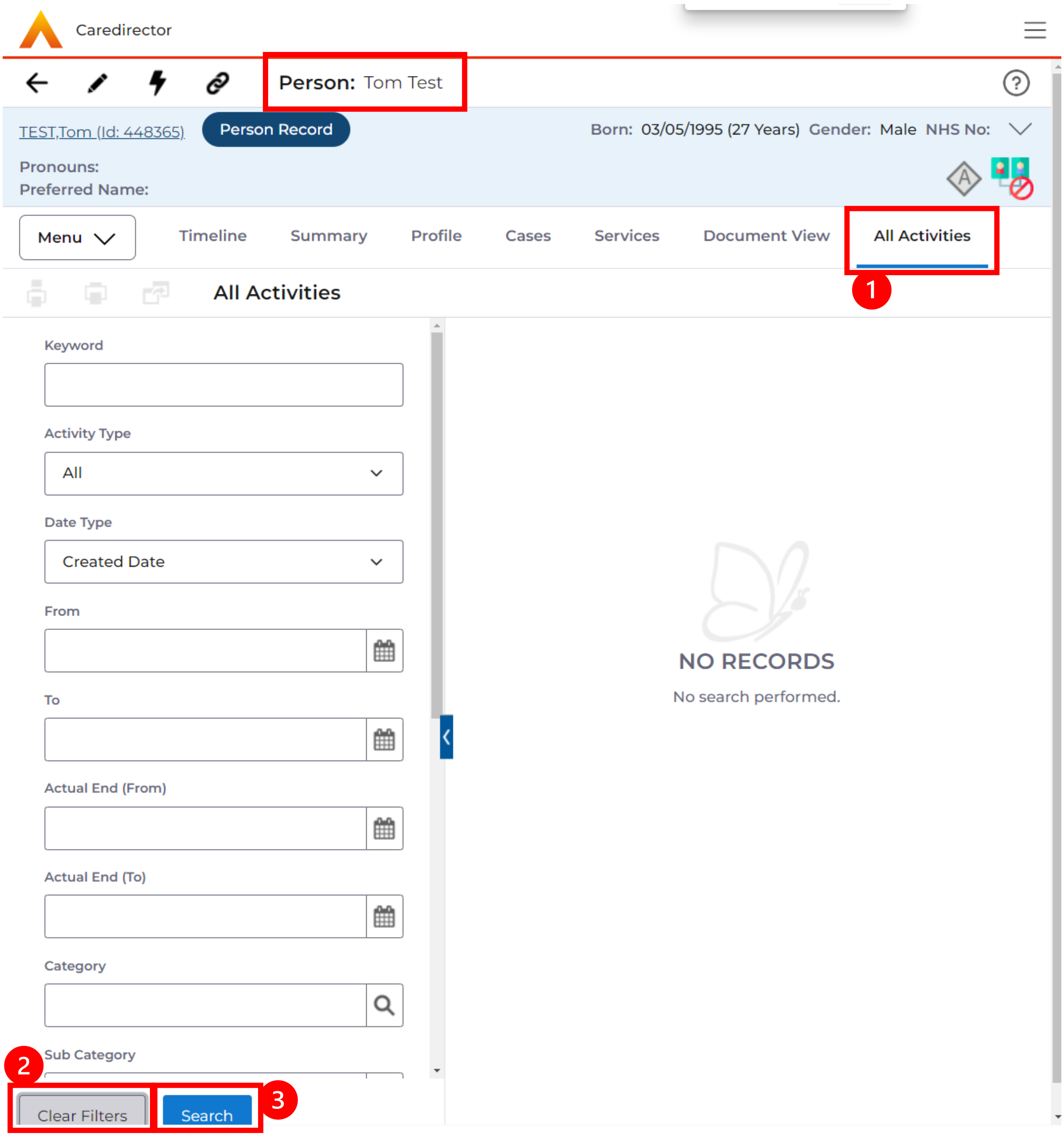
1. The Service Provision booklet is accessible on TriX; however, it is typically the responsibility of the Admin/CSOs on the team to populate and maintain it. To view these go to:
   Person Record > Services



2. There will be a list of Service Provisions here and you can open them to view the information you need.

All Activities

1. There may be times where you need to view all activities. This is useful if you want to see a clear picture of everything and that person's journey. To do this, go to **Person Record > All Activities > Clear Filters > Search**



2. With activities on the person record, you can view them the same way as a case record, but this is read only. Activities should be created on the **Case Record.**
   Person Record > Menu > Activities

Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	25/01/2023