



Continuing Health V1.0

Document CareDirector Continuing Health Bespoke Guide.
Purpose Continuing Health daily tasks on CareDirector.
Version V1.0
Owner ICT Business Transformation Team
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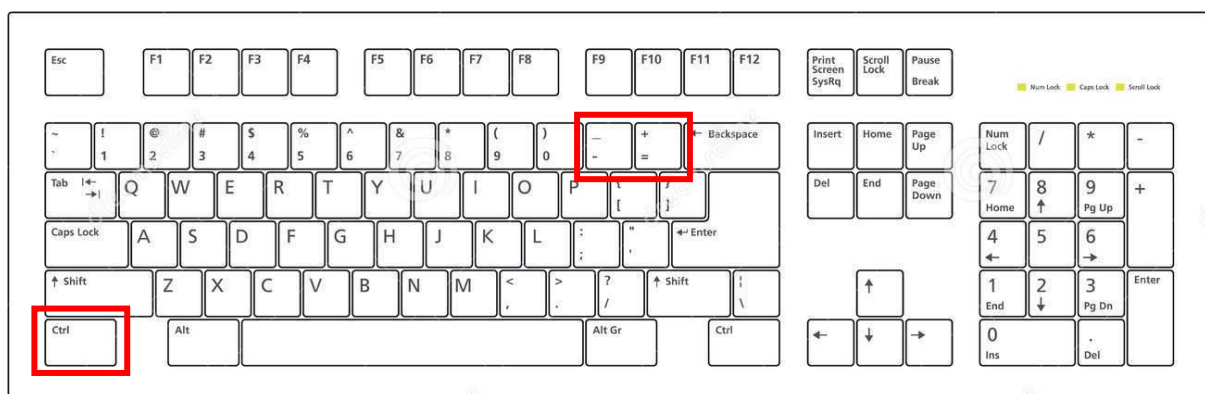
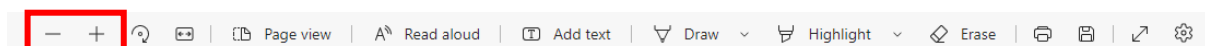
Guide Information

Before Live Access...

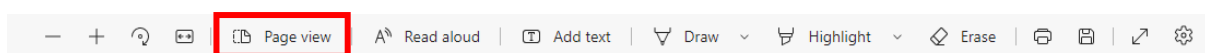
1. Before **CareDirector Live** access can be given, the:
 - a. **E-Learning (GDPR Information Governance)**
 - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

Guide Navigation

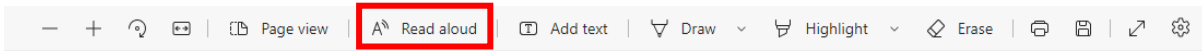
1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.



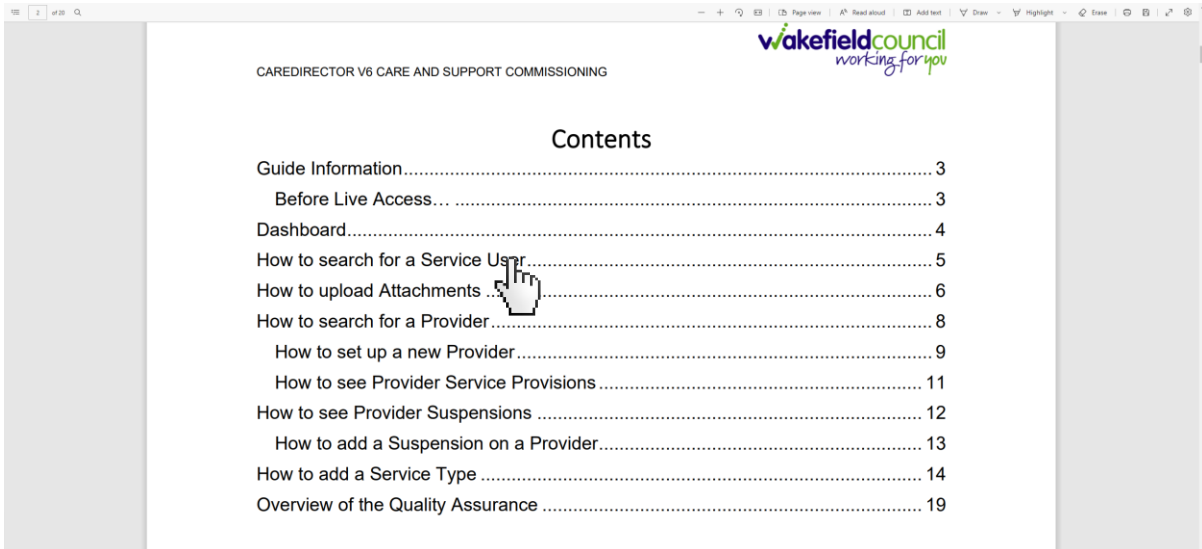
3. To put pages next to one another, select the **Page View** icon on the toolbar.



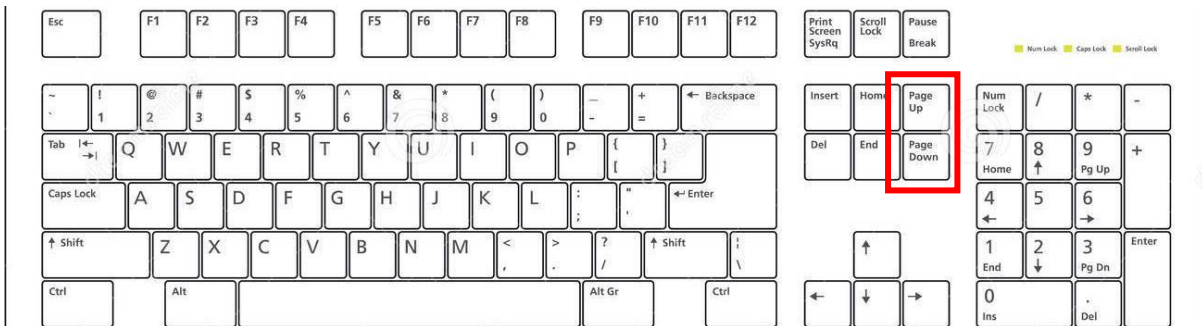
4. For auditory assistance, select **Read Aloud** from the toolbar.



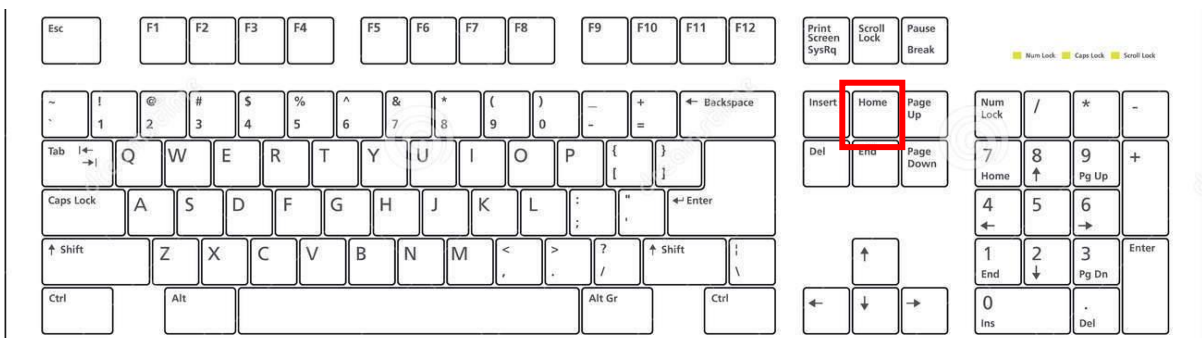
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



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.

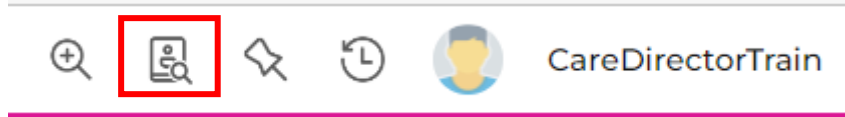


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



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).

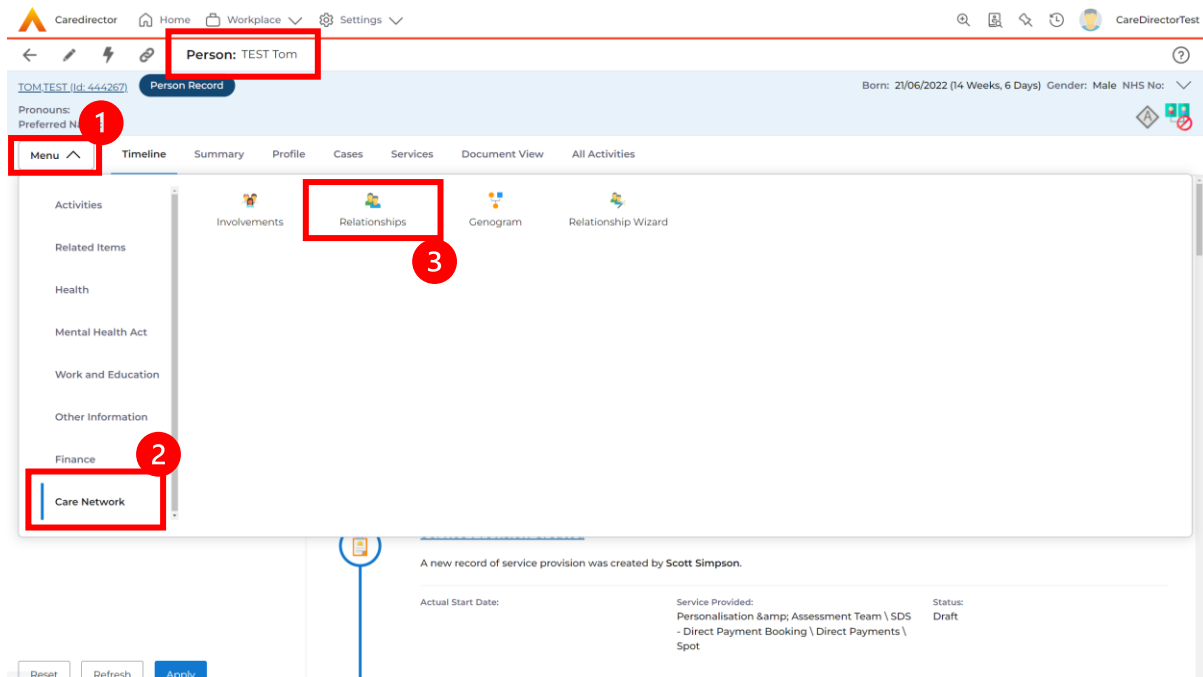
The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The top navigation bar includes 'Home', 'Workplace', and 'Settings'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a timeline of activities for 'OCT 2022' and 'SEP 2022', including 'Form (Case) Created', 'Service Provision Created', and 'Task Created'.

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

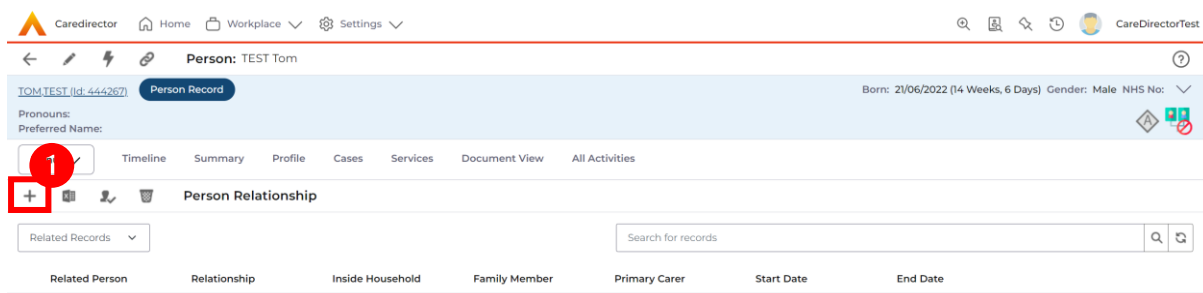
The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. A red box highlights the 'Edit' (pencil) icon in the toolbar. The page displays a form for 'Personal Details' with fields for Id, Title, First Name, Middle Name, Last Name, Stated Gender, Profile Picture, NHS No., Reason for no NHS No., Ethnicity, and Marital Status.

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"/>

When finished, select **Save and Return to Previous Page**.

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 'Person Record' for TOM.TEST (Id: 444267). The 'Cases' tab is selected and highlighted with a red box and a red circle with the number 1. The main content area shows a timeline for OCT 2022 with two entries:

- Form (Case) Created** (Yesterday at 15:05): A new record of form (case) was created by Scott Simpson. Details: Due Date: (blank), 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: (blank), Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot, Status: Draft.

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

The screenshot shows the 'Cases' tab selected and highlighted with a red box and a red circle with the number 1. Below the tab, a table of related records is shown, with the table header and the first three rows highlighted by a red box and a red circle with the number 2.

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

How to create a Case

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

The screenshot shows the 'Person Record' for Tom MullenTest. The 'Cases' tab is selected, and a red box highlights the '+ Create New Record' button. A table of existing cases is visible below.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
CareDirectorTest	Catherine Jackson	15/06/2022 08:00:00	A - Adult Safeguarding	CAS-000001-0002		Assign To Team	Scott :

2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

The screenshot shows the 'Case: New' form. The 'Case No' field is highlighted with a red box and a circled '1'. The form includes fields for Case No, Person, Case Date/Time, Initial Contact, Date/Time Contact Received, Contact Received By, Contact Reason, Presenting Priority, Additional Information, and Referral Reason.

How to check the Case Status

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

Person: TEST Tom

Person Record

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

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

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
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

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

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

Person Record

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

Menu Timeline **Details**

Assignment Information

Case Status *
Assign To Team

Case Priority

Responsible User

Responsible Team *
AMHP Coordinator

Review Date

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 currently set to 'Assign To Team'. A red box highlights the field with a '1' in a red circle. A magnifying glass icon next to the field is highlighted with a red box and a '2' in a red circle. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team' (set to 'AMHP Coordinator'), 'Review Date', and 'Last Assigned to Team Date' (20/09/2022).

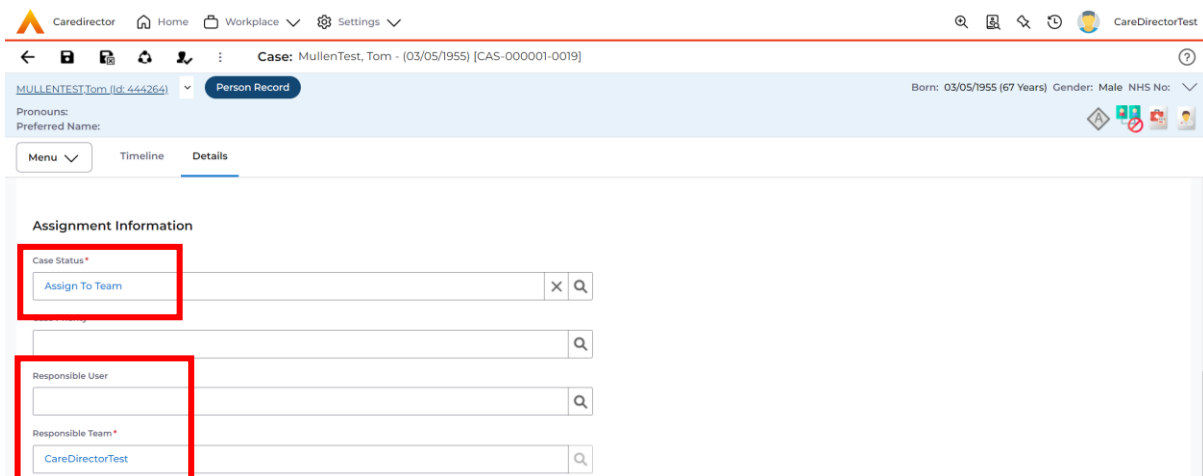
2. Choose the relevant option and select **OK** when found. Select **Save**.

The screenshot shows the 'Case Statuses' lookup dialog box. The title is 'Case Statuses Enter your search criteria.'. The 'Look in' dropdown is set to 'Social Care Case Status Lookup View'. The search bar contains 'Search for records'. A table of case status options is shown, with the first row 'Allocated' highlighted by a red box and a '1' in a red circle. The 'OK' button is highlighted with a red box and a '2' in a red circle. The table has columns for 'Name', 'Code', and 'Gov C'. The table content is as follows:

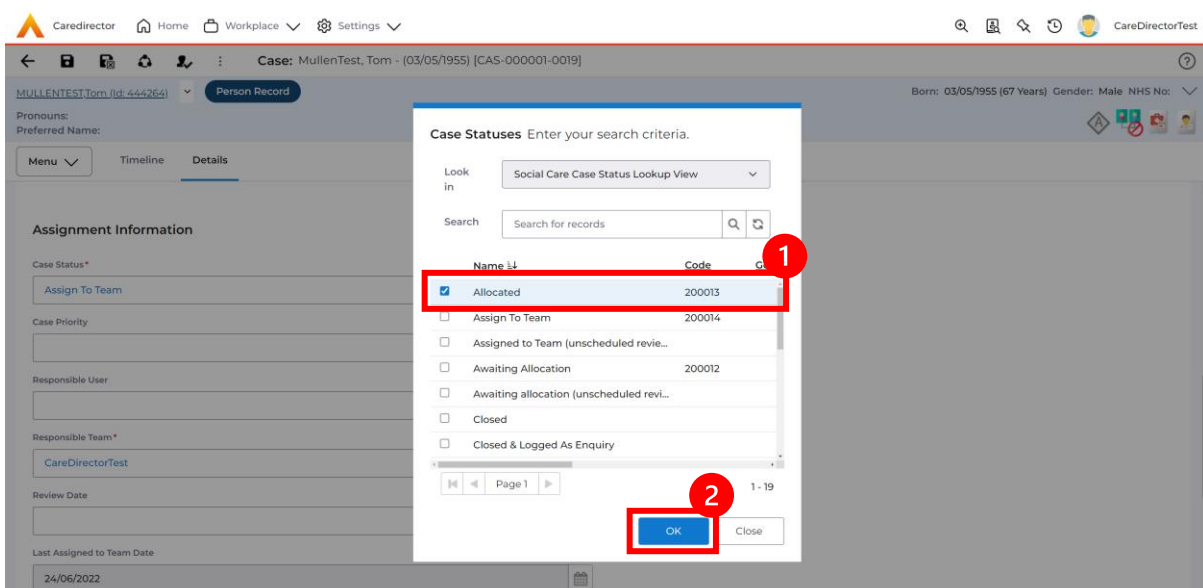
Name	Code	Gov C
<input type="checkbox"/> Allocated	200013	
<input type="checkbox"/> Assign To Team	200014	
<input type="checkbox"/> Assigned to Team (unscheduled review...)		
<input type="checkbox"/> Awaiting Allocation	200012	
<input type="checkbox"/> Awaiting allocation (unscheduled review...)		

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.

The background interface shows the 'Assignment Information' section with the 'Responsible User*' field highlighted in blue.

- 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: [Empty]
- Responsible User*: Scott Simpson
- Responsible Team*: CareDirectorTest
- Review Date: [Empty]

The toolbar at the top shows the 'Save' button 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 record. The 'Assignment Information' section contains the following fields:

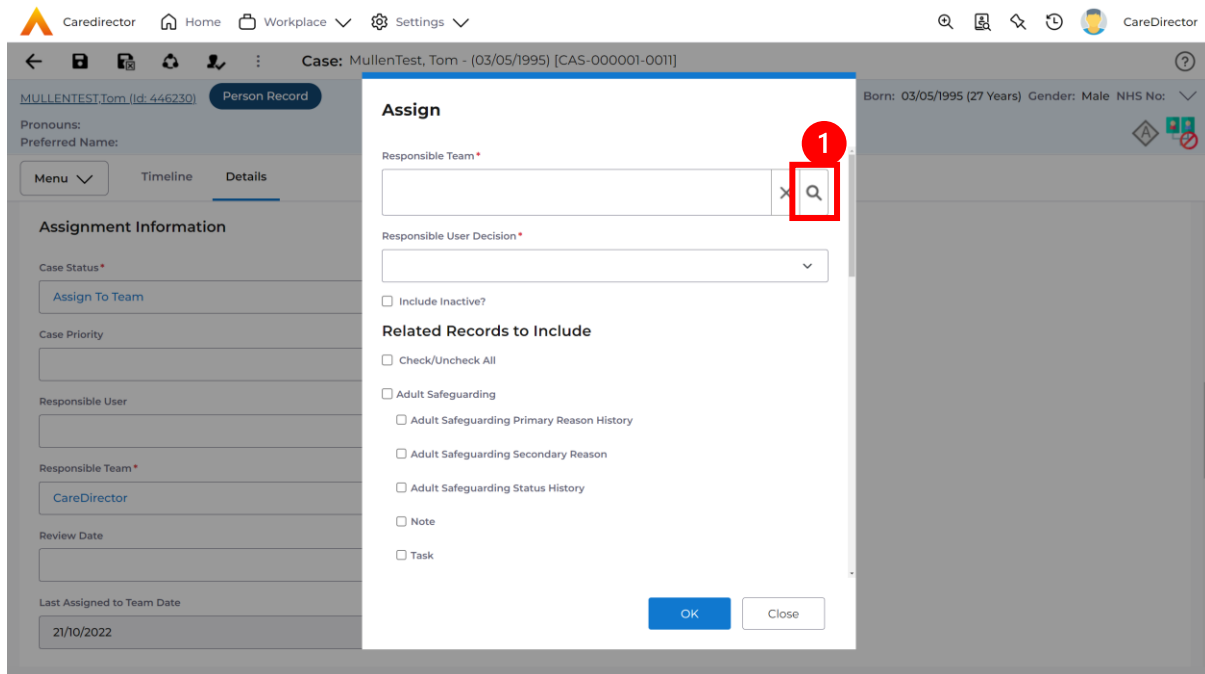
- Case Status ***: A dropdown menu with 'Assign To Team' selected. A red box and a '1' in a red circle highlight the search icon on the right of this field.
- Case Priority**: An empty text input field with a search icon on the right.
- Responsible User**: A text input field containing 'Scott Simpson'.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

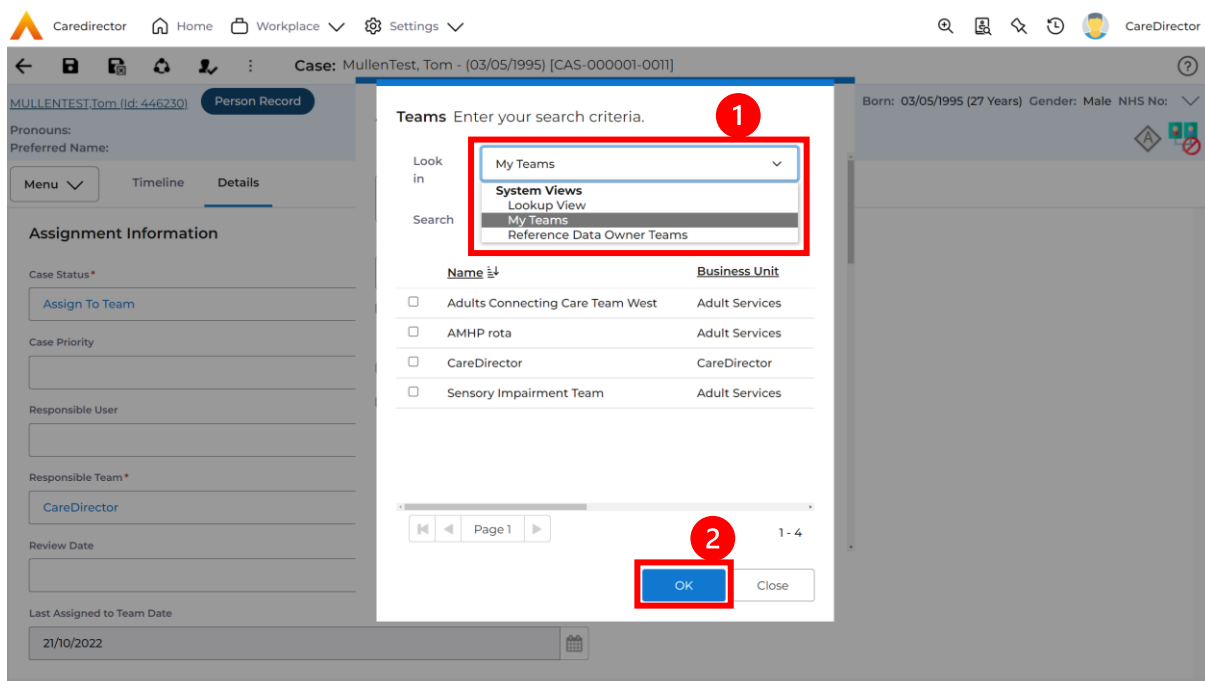
The screenshot shows the CareDirector interface for the same case record. The 'Assignment Information' section contains the following fields:

- 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 '1' 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**.

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

- When finished, select **OK**. It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.

How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.
2. Select **Menu**, **Care Network** select **Involvements**.

The screenshot shows the CareDirector interface for a case. The breadcrumb path is 'Case: Maisey, Test - (19/11/2000) [CAS-000001-0080]'. The 'Menu' dropdown is open, showing options like 'Activities', 'Actions', 'Adult Safeguarding', 'Attachments', 'Audit', 'Conferences/Meetings', 'Deprivations Of Liberty', 'Forms (Case)', and 'Involvements'. The 'Involvements' option is highlighted with a red box and a '3'. The 'Related Items' sidebar is also visible with a '2'. The main content area shows a timeline of events, including 'Form (Case) Created' and 'Case Involvement Updated'.

3. Within this screen, select **Create New Record** on the toolbar.

The screenshot shows the 'Case Involvements' toolbar with a '+' icon highlighted with a red box and a '1'. Below the toolbar is a table of related records. The table has columns for 'Involvement Member', 'Role', 'Involvement Re...', 'Case', 'Responsible Team', and 'Start Date'. The table contains five rows of data.

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team	Maisey, Test - (19/11/2000) [CAS-000001-0080]	Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022
<input type="checkbox"/>	Community Occupatio...	* Secondary Team	Maisey, Test - (19/11/2000) [CAS-000001-0080]	Maisey, Test - (19/11/2000) [CAS-000001-0080]	Community Occupatio...	31/08/2022
<input type="checkbox"/>	Matt Davies	Responsible User	Maisey, Test - (19/11/2000) [CAS-000001-0080]	Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022
<input type="checkbox"/>	Matt Davies	Responsible User	Maisey, Test - (19/11/2000) [CAS-000001-0080]	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]	Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022

- 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. Other fields include 'Case', 'Person', 'Involvement Member', 'Responsible Team', 'Involvement Priority', 'Involvement Status', 'End Date', 'Involvement End Reason', and 'Involvement Review Date'. The 'Case' field contains 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Person' field contains 'TEST Tom'. The 'Involvement Member' field contains 'Peter King'. The 'Responsible Team' field contains 'CareDirectorTest'. The 'Start Date' field contains '04/10/2022'. The 'Involvement Review Date' field is empty.

How to clone a Case

1. Locate the **Case** you want to **Clone**. Select **Details** tab.

The screenshot shows the CareDirector interface for a case. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0010]'. Below the title, there are tabs for 'Person Record', 'Timeline', and 'Details'. The 'Details' tab is selected and highlighted with a red box. The 'Contact Details' section contains the following information:

- Case No*: CAS-000001-0010
- Person*: TEST Tom
- Case Date/Time*: 21/06/2022 07:00
- Contact Received By*: Scott Simpson
- Contact Reason*: A - Adult Safeguarding
- Presenting Priority: (empty)
- Additional Information: (empty)
- Referral Reason: (empty)

2. Then select the **Three Dots** on the toolbar. Then select **Clone**.

The screenshot shows the CareDirector interface for a case, similar to the previous one. The 'Details' tab is selected. A red circle with the number '1' highlights the 'Three Dots' menu icon in the toolbar. A dropdown menu is open, showing various actions. A red circle with the number '2' highlights the 'Clone' option in the menu. The case information is the same as in the previous screenshot.

3. 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: [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 [2]

- 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

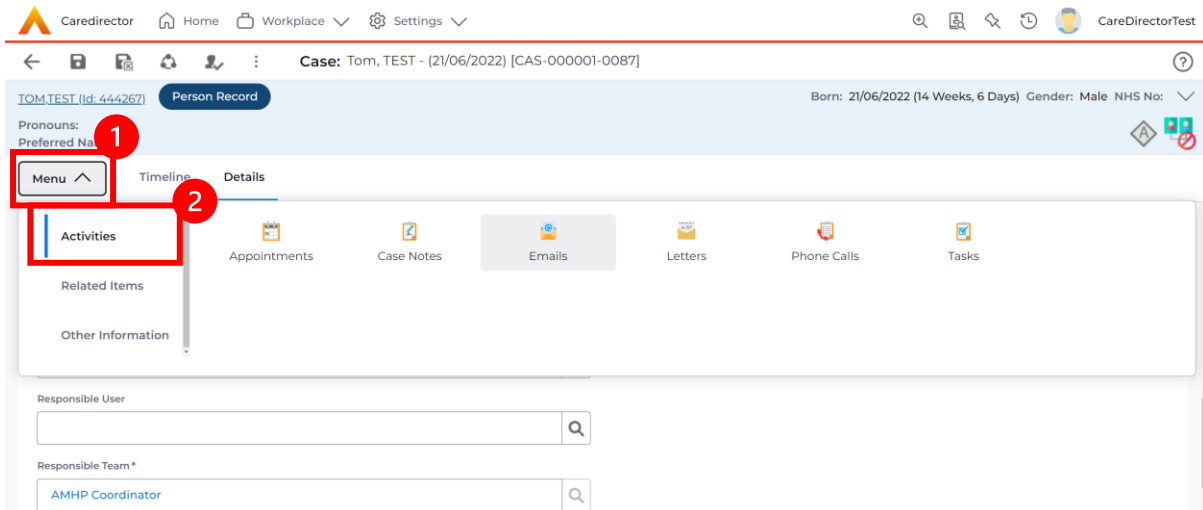
- If you want to see where that **Activity** is from. Look on the **Regarding** column.

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.

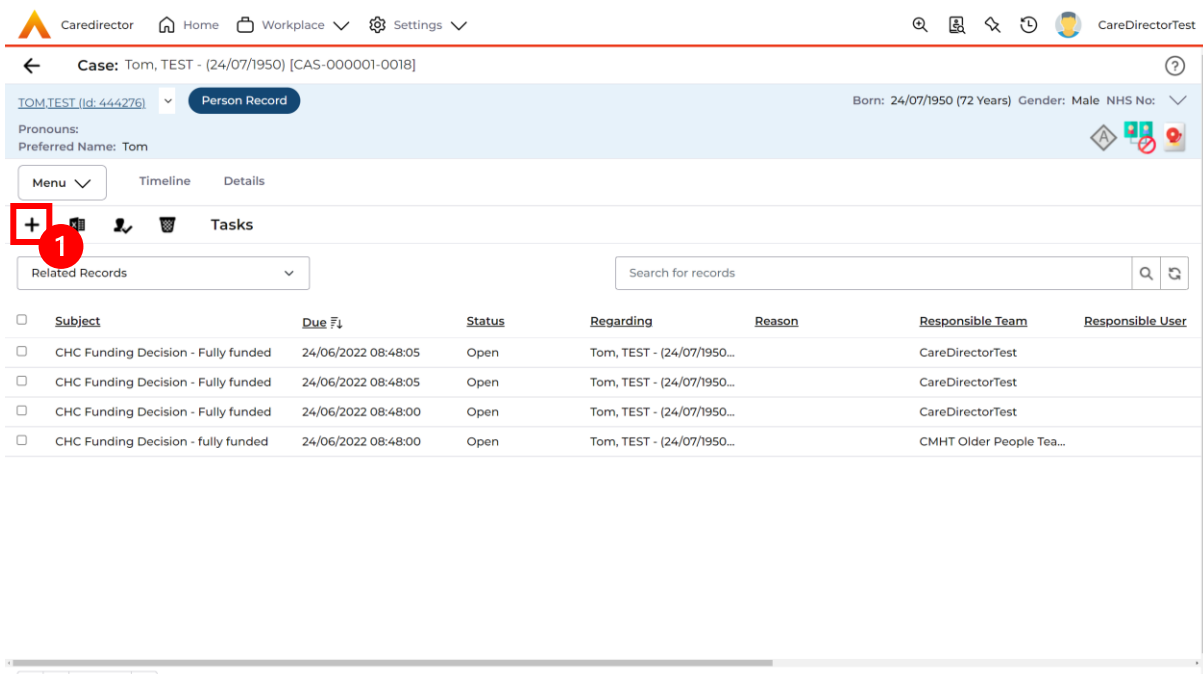
Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	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.



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



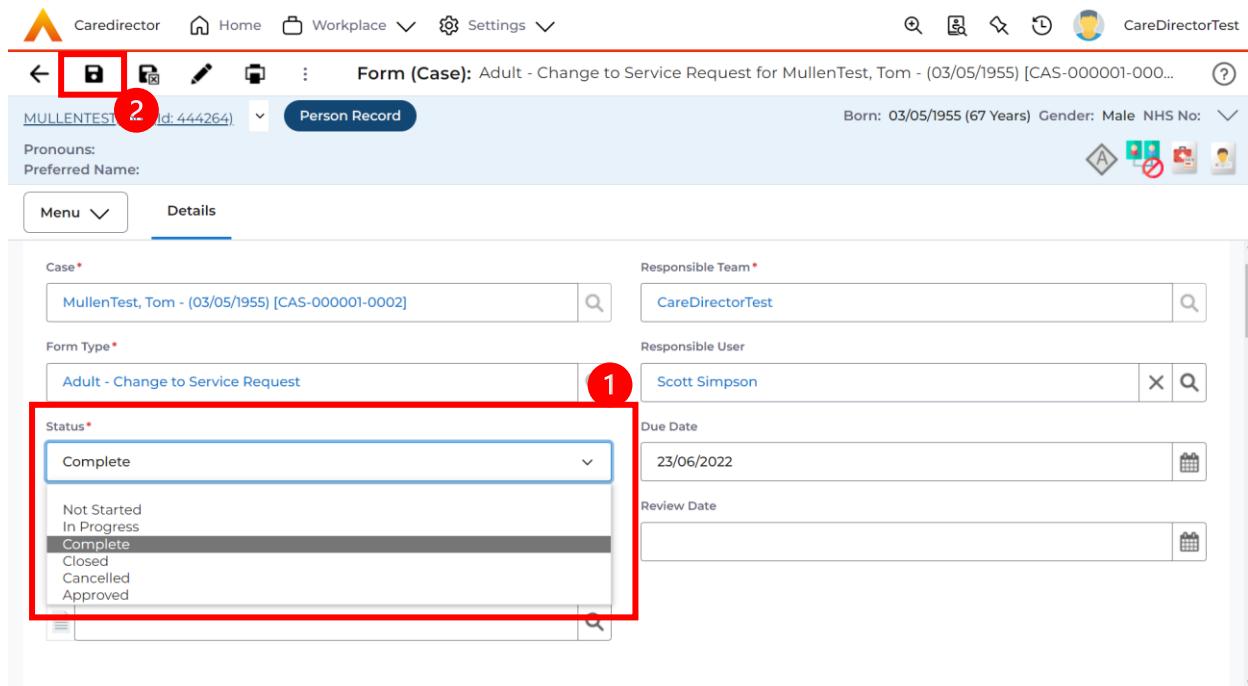
3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the CareDirector web interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. A red box with a '2' highlights the 'Save' button in the top left. Below this is a breadcrumb trail: 'Case Note (For Case): New'. The main content area is titled 'Person Record' for 'TOM.TEST (id: 444267)'. It shows personal details like 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. Below this is a 'Details' section with a form. The 'Responsible Team' field is set to 'CareDirectorTest' and is highlighted with a red box and a red circle with '1'. The 'Responsible User' field is set to 'Scott Simpson' and is also highlighted with a red box and a red circle with '1'. Other fields include 'Case', 'Reason', 'Priority', 'Date', 'Status', 'Category', 'Sub-Category', and 'Outcome'. A small note at the bottom says 'Contains Information Provided By A Third Party?'.

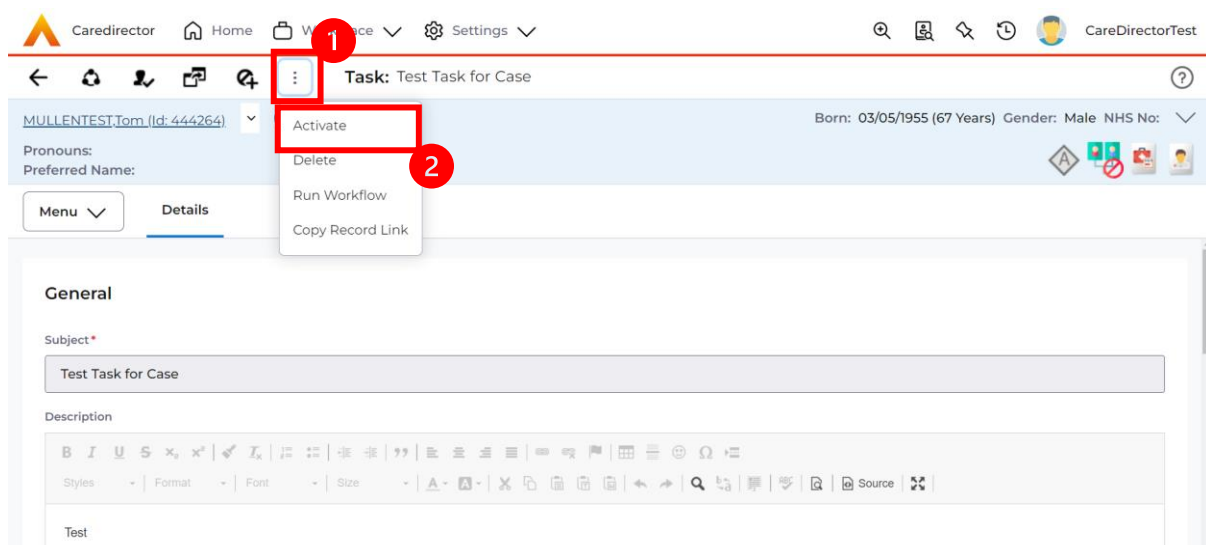
4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.

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

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

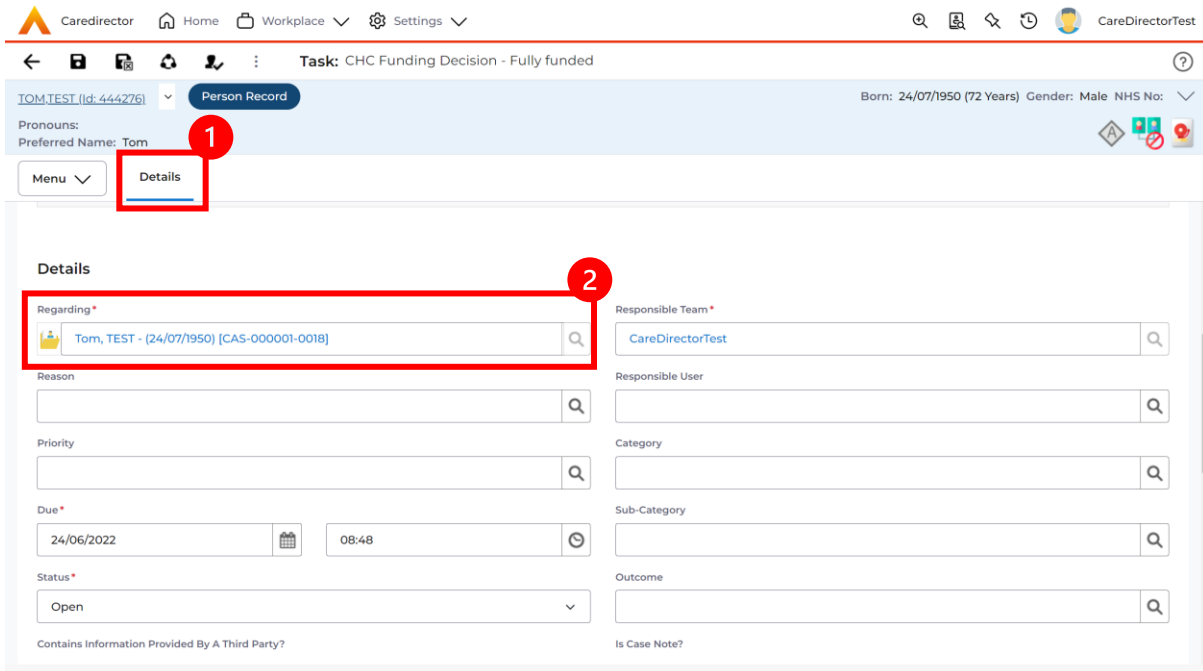


3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

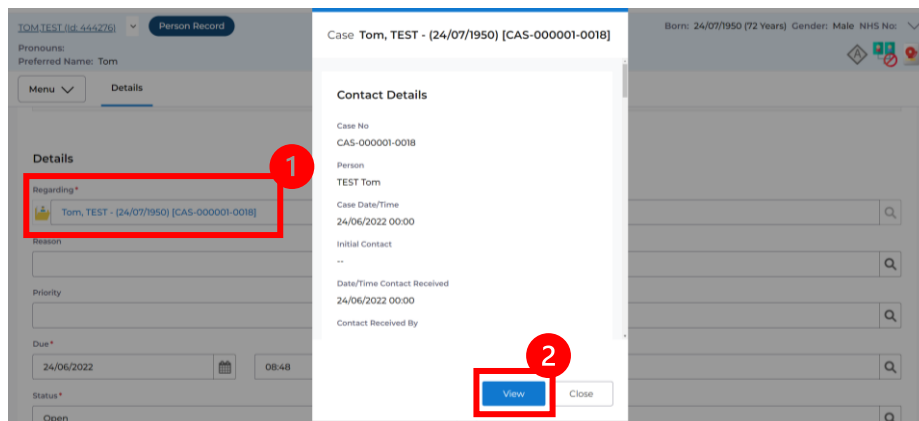


How to tell if an Activity is linked to a Case or Person Record

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



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



How to Allocate a new Activity to another team

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

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' as the selected option. Other fields include 'Regarding' (MullenTest_Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'.

2. Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.

The screenshot shows the 'Task: New' form with a 'Teams' lookup 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 dialog box also shows a search bar, a table of teams, and pagination (Page 1, 1-4).

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.

Caredirector Home Workplace Settings

Task: New

MULLENTEST, Tom - (03/05/1995) [CAS-000001-001] Person Record

Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns: Preferred Name:

Details

Regarding*
MullenTest, Tom - (03/05/1995) [CAS-000001-001]

Reason

Priority

Due*

Status*
Open

Contains Information Provided By A Third Party?
 Yes
 No

Responsible Team*
Sensory Impairment Team

Responsible User
Scott Simpson

Category

Sub-Category

Outcome

Is Case Note?
 Yes
 No

How to Allocate an existing Activity to another team

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

The screenshot shows the CareDirector interface for a task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main content area is titled 'Details' and contains several fields:

- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: Scott Simpson. This field is highlighted with a red box and a '1' in a red circle, indicating the 'X' icon used for selection.
- Priority**: (Empty)
- Category**: (Empty)
- Due***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status***: Open
- Outcome**: (Empty)

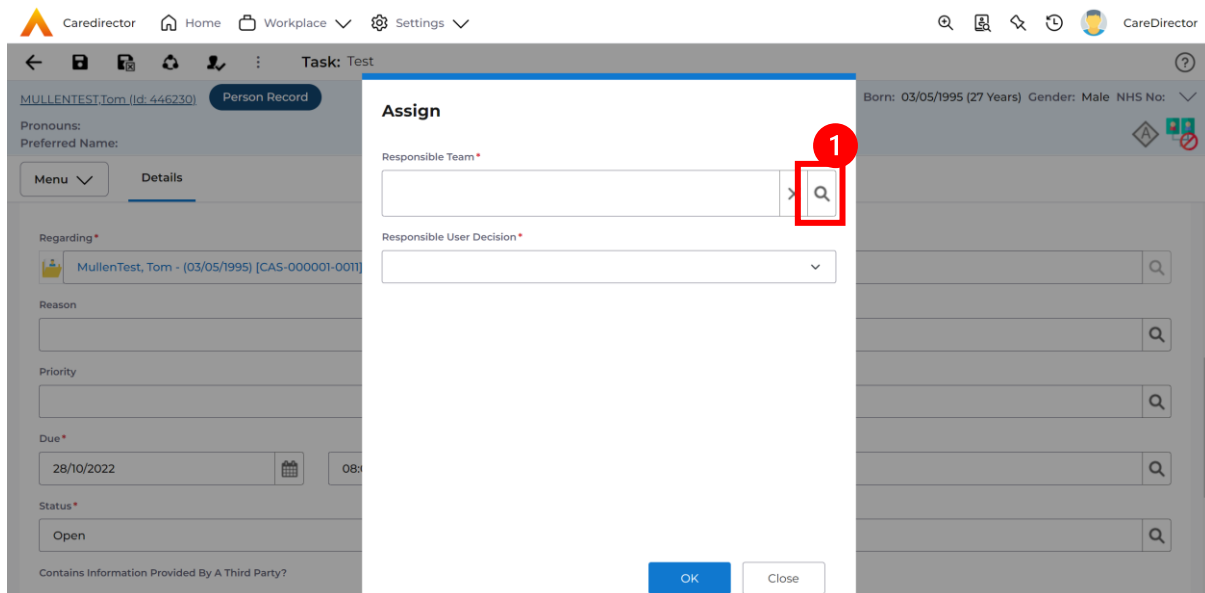
2. Next select **Assign this record to another team** from the toolbar.

The screenshot shows the CareDirector interface for a task. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The task title is 'Task: Test'. The main content area is titled 'Details' and contains several fields:

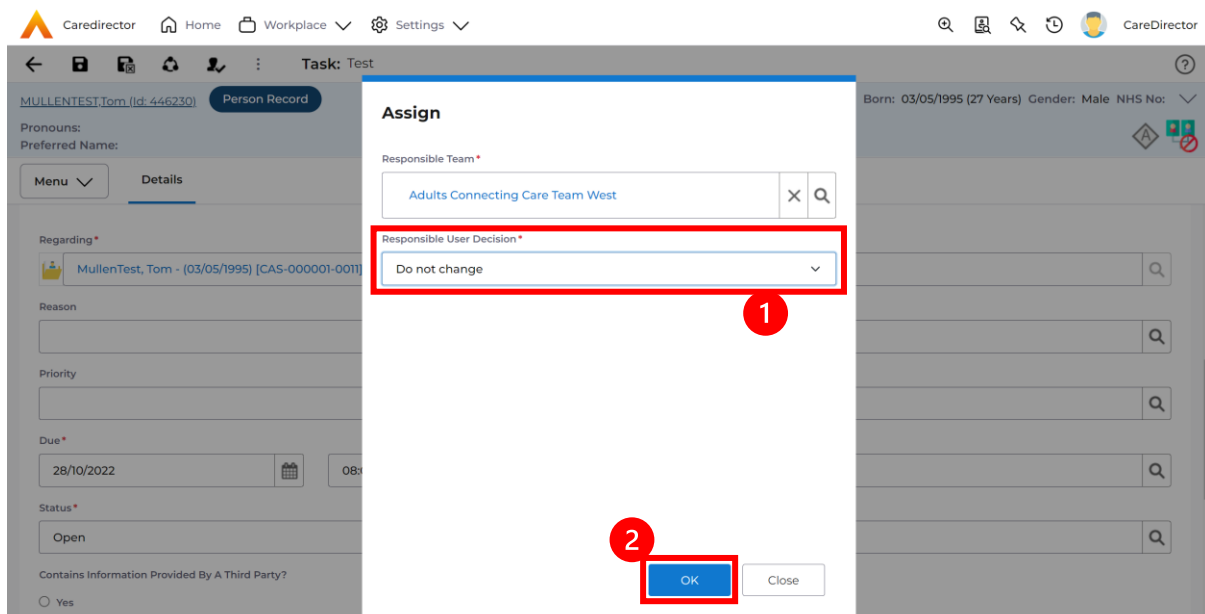
- Regarding***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: (Empty)
- Priority**: (Empty)
- Category**: (Empty)
- Due***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status***: Open
- Outcome**: (Empty)

The toolbar at the top of the form contains several icons. The 'Assign this record to another team' icon (a person with a plus sign) is highlighted with a red box and a '1' in a red circle.

- 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.



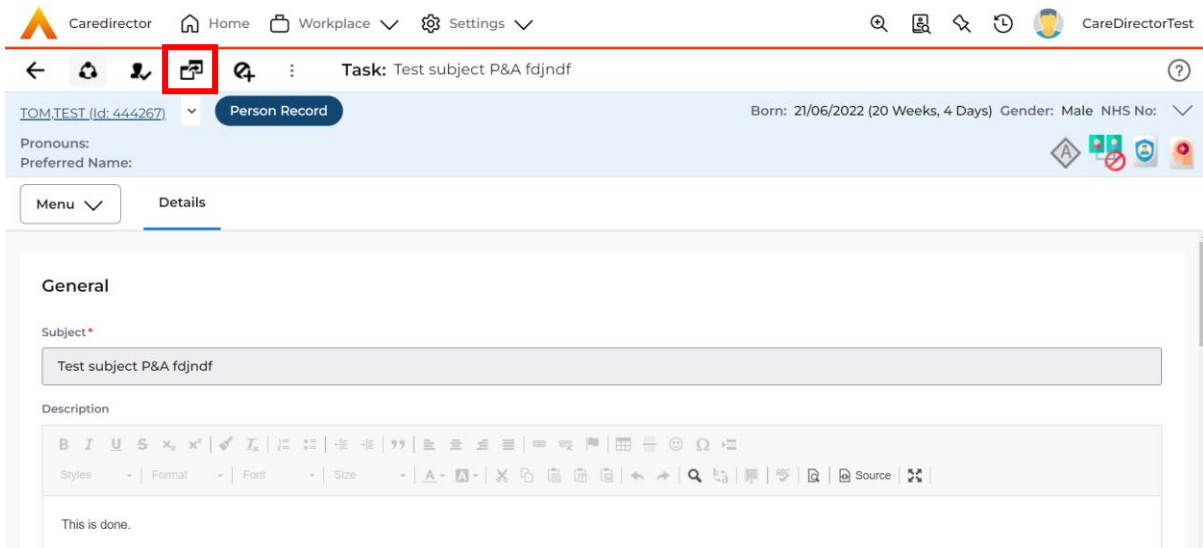
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**.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



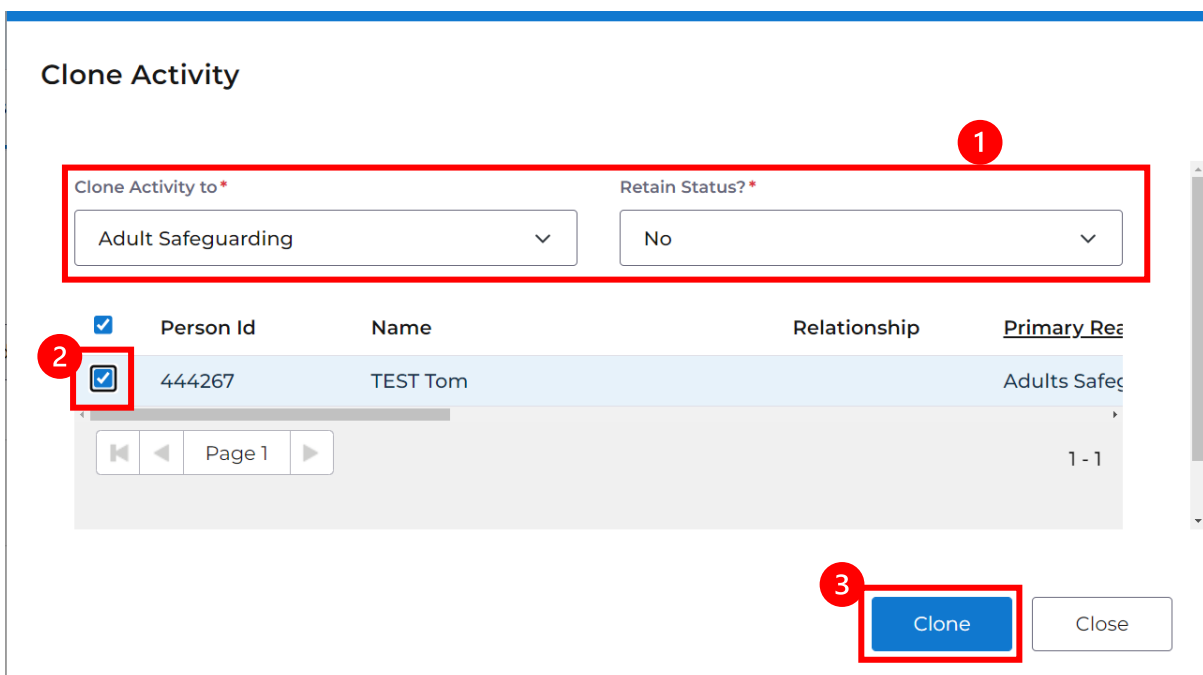
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

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**.

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' and 'Person Record' for 'TOM.TEST (id: 444267)'. The record details include 'Born: 21/06/2022 (15 Weeks, 0 Day)', 'Gender: Male', and 'NHS No:'. The left sidebar contains a 'Menu' (1) with 'Related Items' (2) selected. The main content area shows various record categories, with 'Attachments' (3) highlighted in a red box.

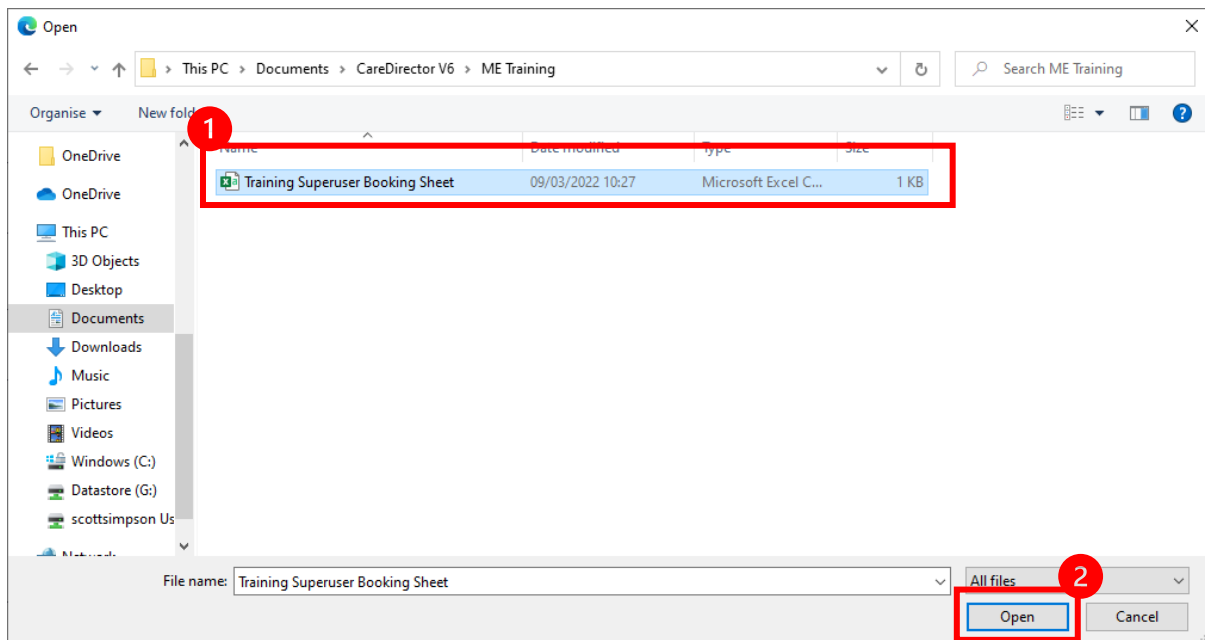
2. When opened, select the **Create New Record** from the toolbar.

The screenshot shows the 'Attachments (For Person)' screen in CareDirector. The top navigation bar is the same as in the previous screenshot. The main header shows 'Person: TEST Tom' and 'Person Record' for 'TOM.TEST (id: 444267)'. The left sidebar contains a 'Menu' (1) with a '+' icon highlighted in a red box. The main content area shows a toolbar with a '+' icon (1) and a search bar. Below the toolbar is a table with columns: 'Title', 'Document Type', 'Document Sub Type', 'Date', 'Created By', and 'Created On'. The table is empty, and a message reads 'NO RECORDS No results were found for this screen.'

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', with the 'Browse' button also highlighted. 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

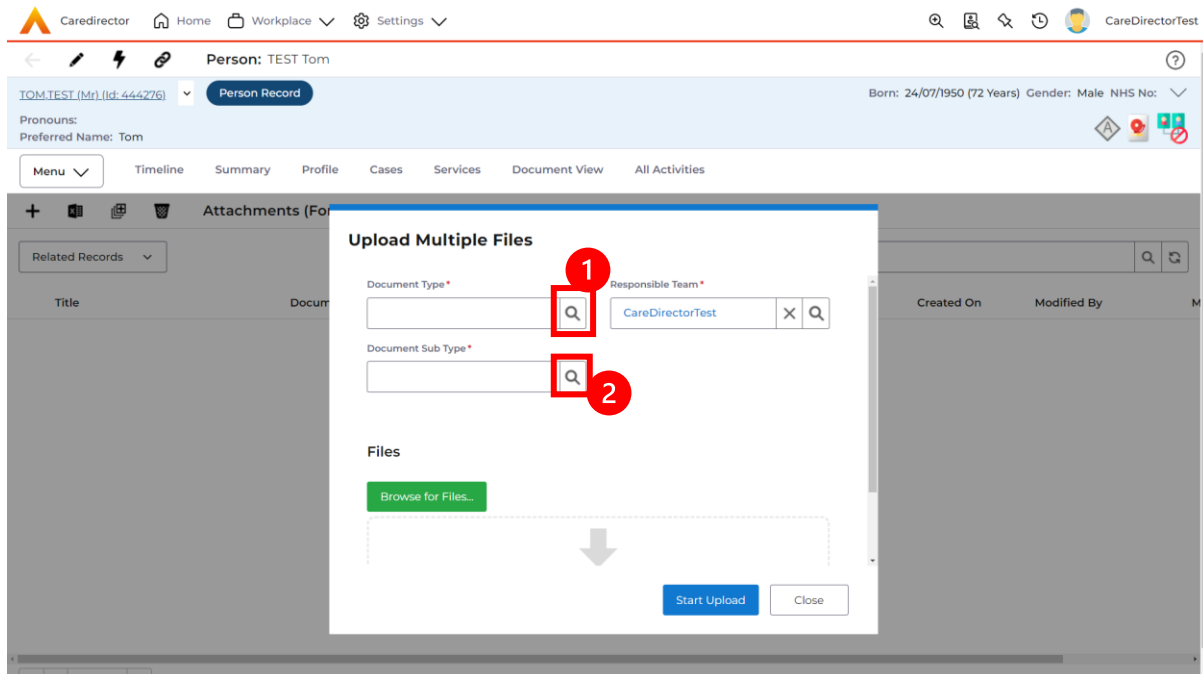
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.

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 record is for 'Person: TEST Tom' (ID: 444267), born 21/06/2022, male. The 'Menu' is open, and 'Related Items' is selected. The 'Attachments' option is highlighted in the 'Related Items' section.

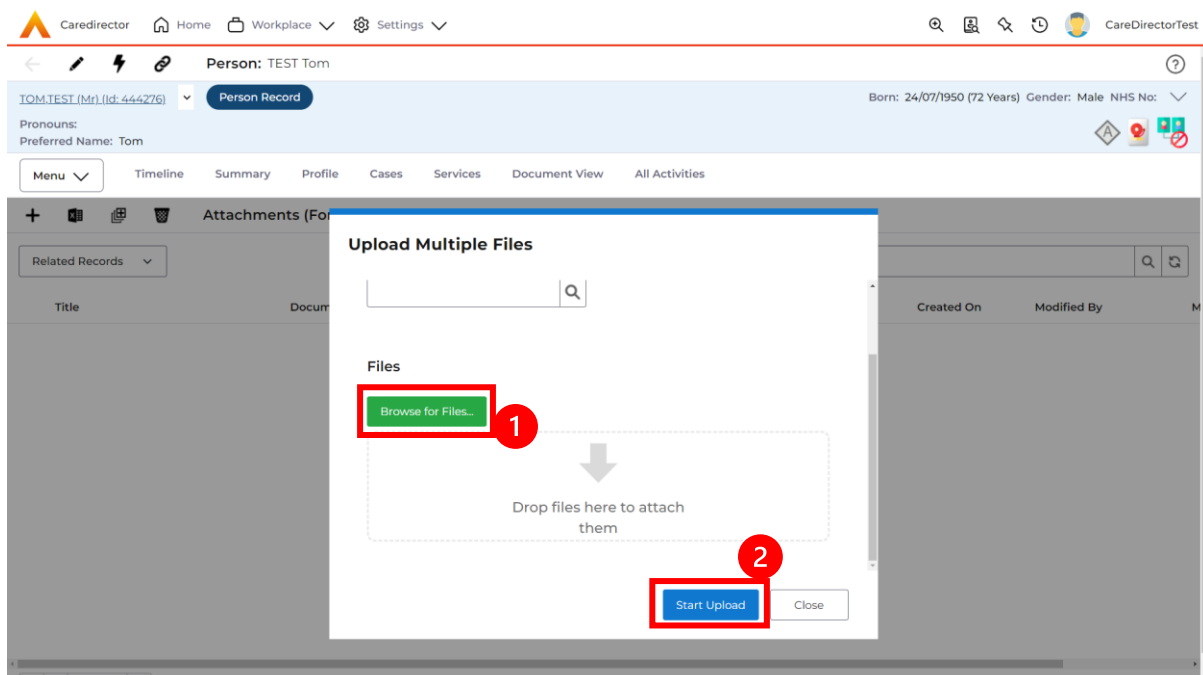
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.

The screenshot shows the 'Attachments (For Person)' screen. The top navigation bar is the same as in the previous screenshot. The 'Menu' is open, and 'Attachments' is selected. The toolbar includes a '+', a trash icon, and a 'Upload Multiple Files' icon (highlighted with a red box and '1'). Below the toolbar is a search bar and a table with columns: Title, Document Type, Document Sub Type, Date, Created By, and Created On. The table is empty, and a message reads: 'NO RECORDS No results were found for this screen.'

- This will open a window and the **Document Type** and **Document Sub Type** needs to be chosen using the **Lookup** function.

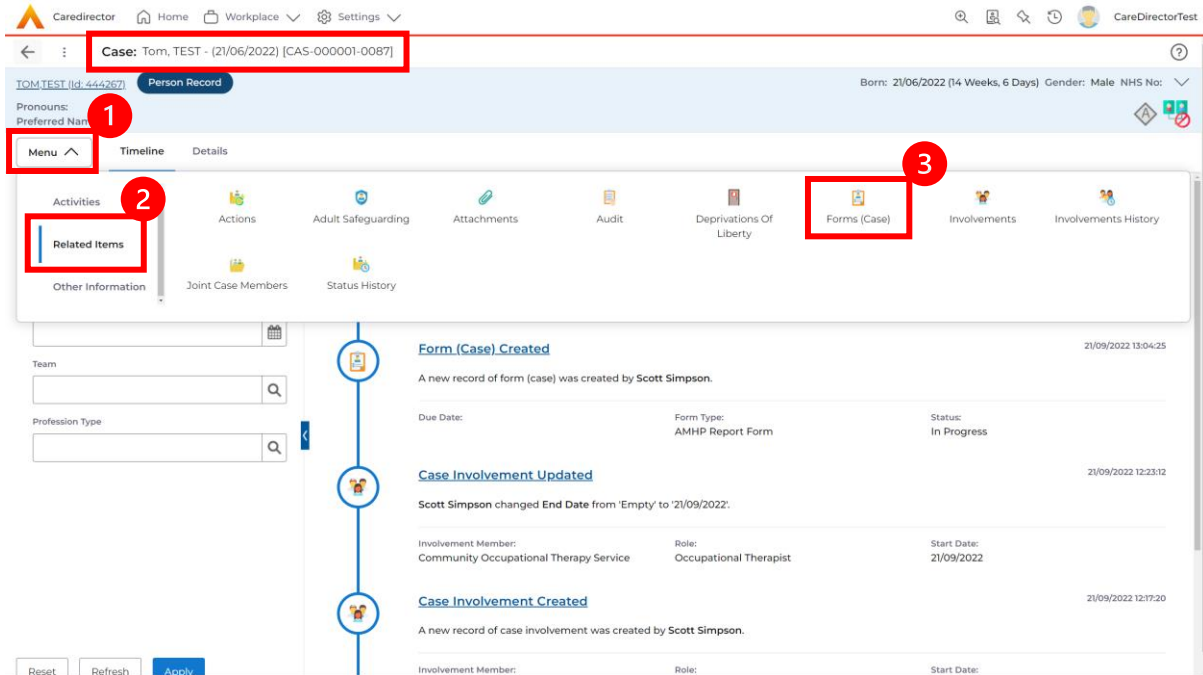


- If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When done, select **Start Upload**.

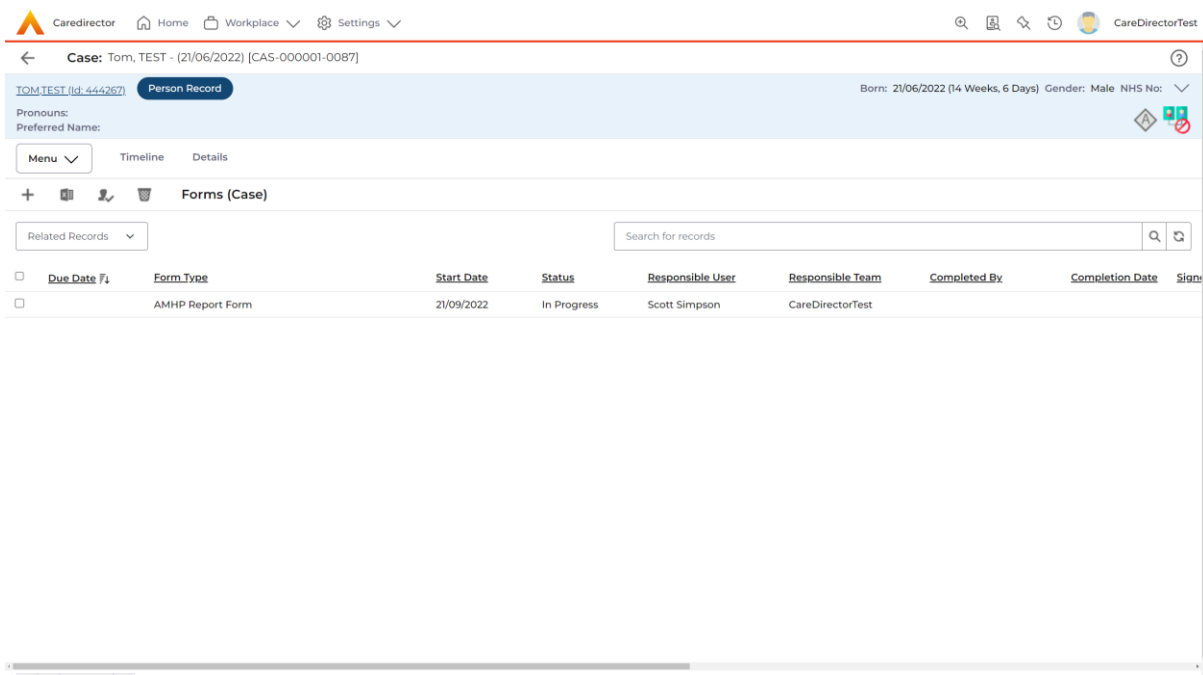


How to find a Form (Case)

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.



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



How to add a Form

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

Person: TEST Tom

Person Record

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

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

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

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

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

Person Record

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

Menu ^ Timeline Details

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

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.

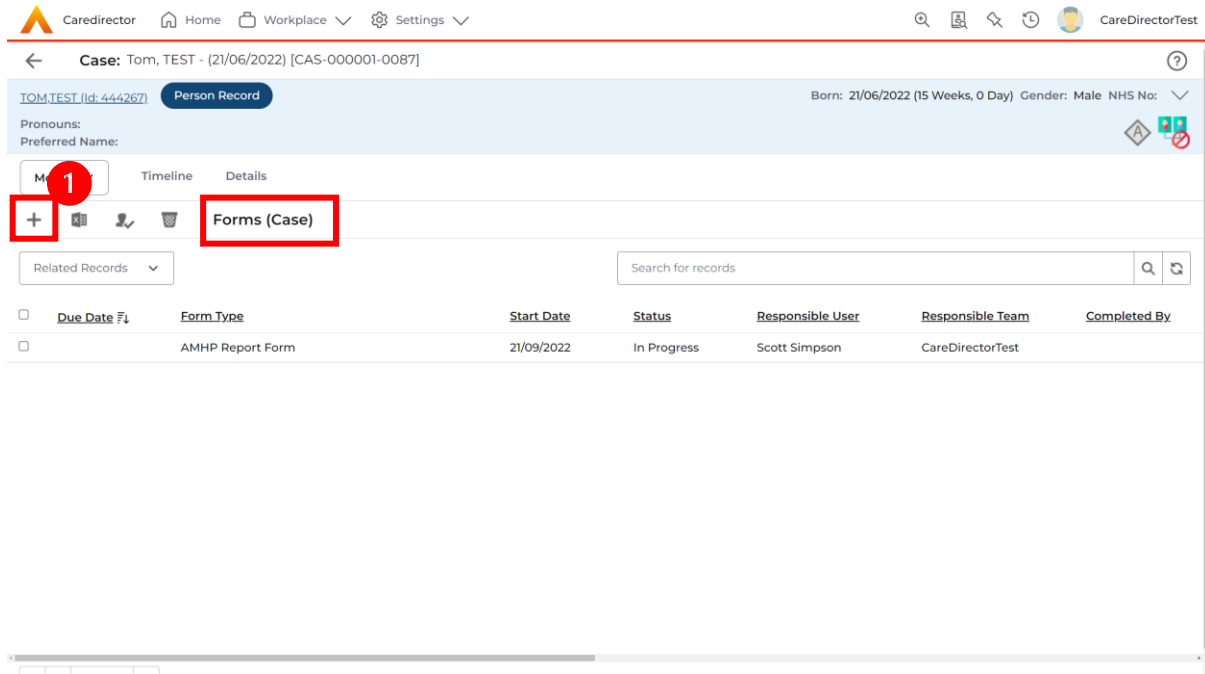
Due Date: [input] Form Type: AMHP Report Form Status: In Progress

Case Involvement Updated 21/09/2022 12:23:12

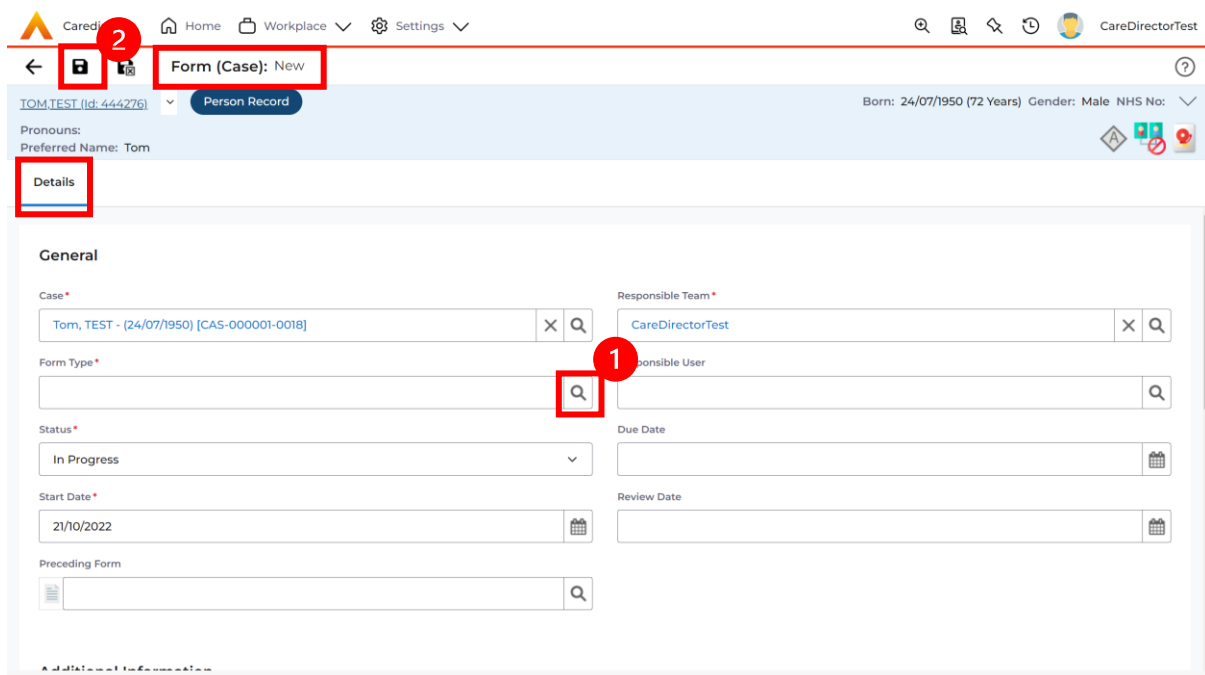
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

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.

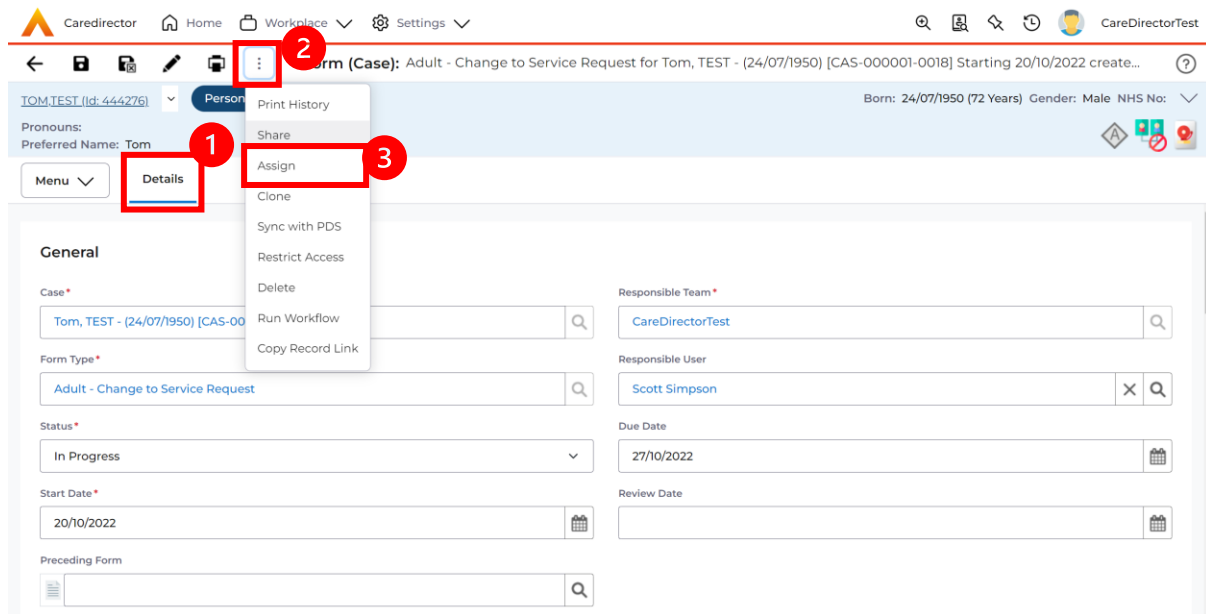
The screenshot shows the CareDirector interface for a specific case. The toolbar at the top contains several icons, with the 'Edit' icon (a pencil) highlighted by a red circle and the number '1'. Below the toolbar, the case details are displayed, including the case name 'Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]' and the user 'CareDirectorTest'. The main form area is titled 'General' and contains several fields: 'Case' (Tom, TEST - (21/06/2022) [CAS-00001-0087]), 'Form Type' (AMHP Report Form), 'Status' (In Progress), 'Start Date' (21/09/2022), 'Responsible Team' (CareDirectorTest), 'Responsible User' (Scott Simpson), 'Due Date', 'Review Date', and 'Preceding Form'.

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

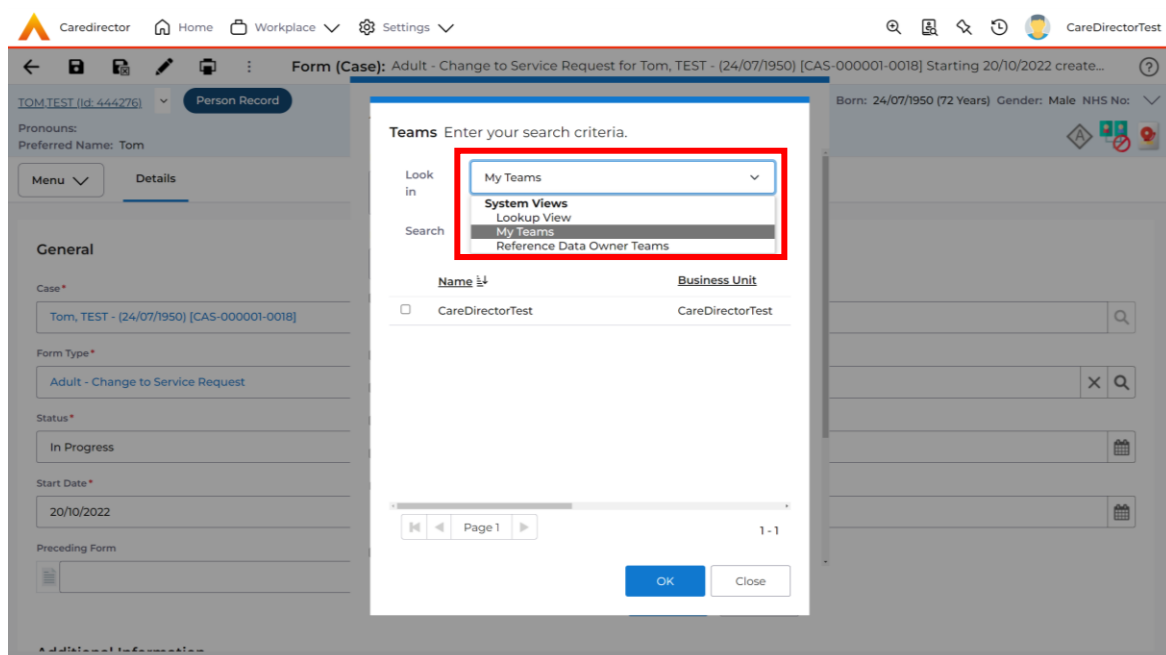
The screenshot shows the CareDirector interface for the 'AMHP Report Form'. The toolbar at the top contains several icons, with the 'Save' icon (a floppy disk) highlighted by a red circle and the number '1'. Below the toolbar, the case details are displayed, including the case name 'AMHP Report Form' and the user 'CareDirectorTest'. The main form area is titled 'AMHP Report Form' and contains several sections: 'Service User Details', 'Referral Details', 'Further Details', 'Background Information', and 'AMHP'S Assessment of th...'. The 'Client previously known to services?' section has radio buttons for 'Yes' and 'No'. The 'Ethnic Origin' section has radio buttons for 'White - British / Northern Irish', 'White - Irish', 'White - Gypsy or Irish Traveller', 'White - Eastern European', 'Mixed - White and Black African', 'Mixed - White and Black Caribbean', 'Mixed - White and Asian', and 'Mixed - Other / Multiple'.

How to Allocate a Form

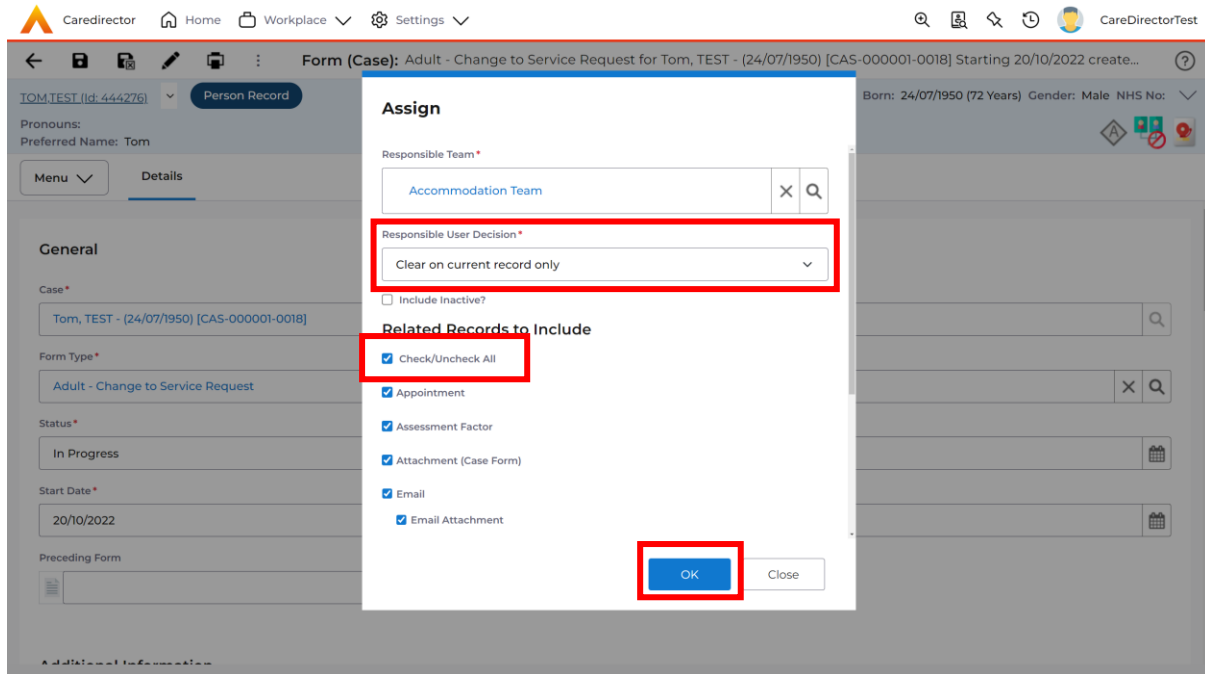
1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



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



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



How to Clone a Form

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.

The screenshot shows the CareDirector interface for a case record. The breadcrumb path 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:

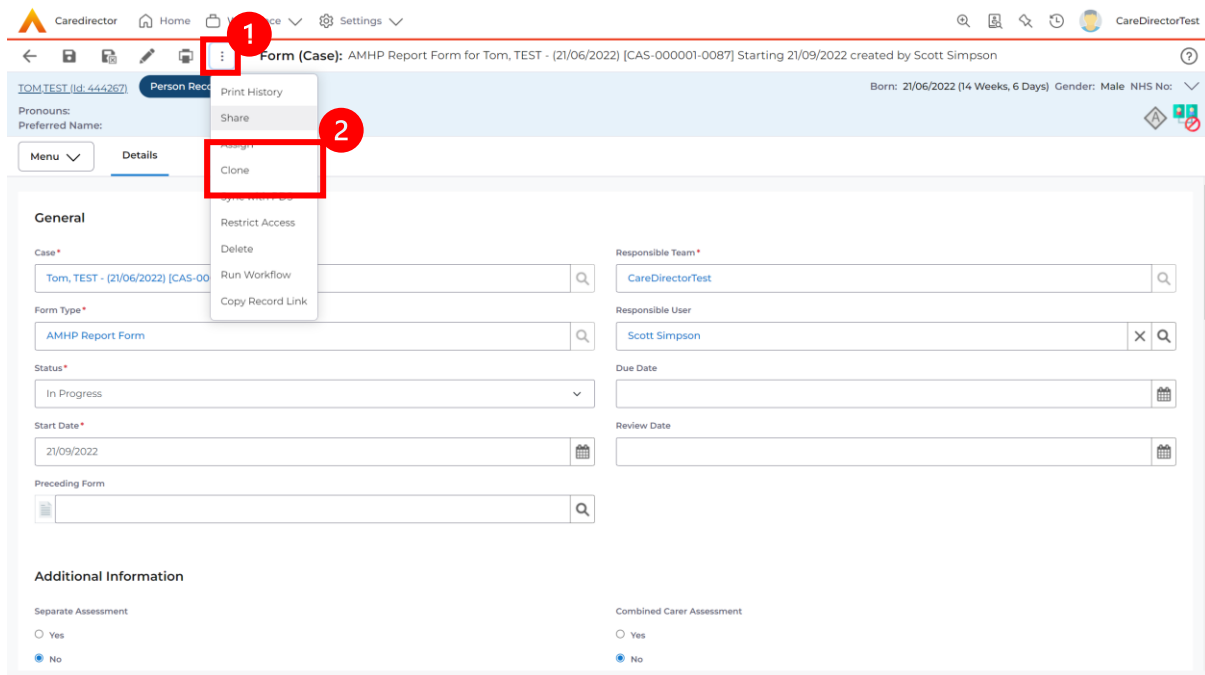
- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'.
- Case Involvement Created** (21/09/2022 12:37:20): A new record of case involvement was created by Scott Simpson.

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

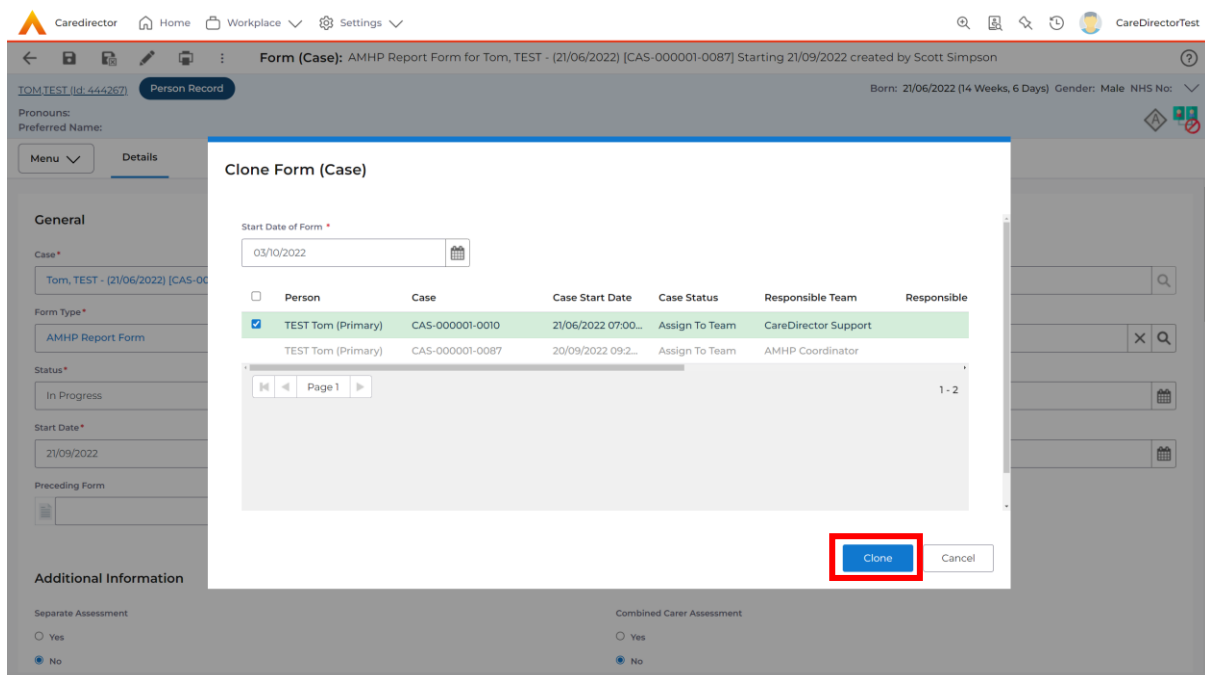
The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' menu is open, showing a list of related records. The table below shows the data for the selected record:

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

3. From the toolbar, select the **Three Dots** and select **Clone**.



4. It will open a new window. Enter the **Start Date of Form**. Select which **Case** you would like this **Form** to be **Cloned** to. When checked, select **Clone**.



5. You do not need to **Save** this.

- Please note: If you would like to **Clone** a **Form** that has another **Status** other than **closed**. You cannot have two **Forms** that are the same in the same **Case**. Therefore, if you want to **Clone** a **Form** to the same **Case** ensure that you **Closed** that **Form** first and get that signed off by the appropriate **System User**.

The screenshot shows the 'Form (Case)' details page in the CareDirector system. The breadcrumb trail is: Home > Workplace > Settings > Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022... The user is logged in as 'CD V6 Team'. The form details are as follows:

Field	Value
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	
Responsible Team*	CareDirectorTest
Responsible User	Scott Simpson
Due Date	11/11/2022
Review Date	
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 for a specific form. The title bar at the top contains the text: "Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...". Below this, the user profile information for "TOM.TEST (id: 444267)" is visible, including "Person Record", "Born: 21/06/2022 (20 Weeks, 4 Days)", and "Gender: Male NHS No:". The main content area is titled "General" and contains several fields:

- 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**: (empty)

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

This screenshot shows the same form as the previous one, but with the three-dot menu icon (indicated by a red circle with the number '1') clicked. A dropdown menu is visible, containing the following options:

- Share
- Assign
- Clone
- Restrict Access
- Activate** (highlighted with a red box and a red circle with the number '2')
- Delete
- Run Workflow
- Copy Record Link

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'. Below this, the person's details are visible: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A red box highlights the 'Person: TEST Tom' breadcrumb. Below the details, a menu bar contains 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. A red box highlights the 'Services' tab, with a red circle containing the number '1' next to it. The main content area shows a timeline for 'SEP 2022' with three entries: 'Task Created' (21/09/2022 13:42:01), 'Form (Case) Created' (21/09/2022 13:04:25), and 'Case Involvement Updated' (21/09/2022 12:23:12). A filter sidebar is visible on the left.

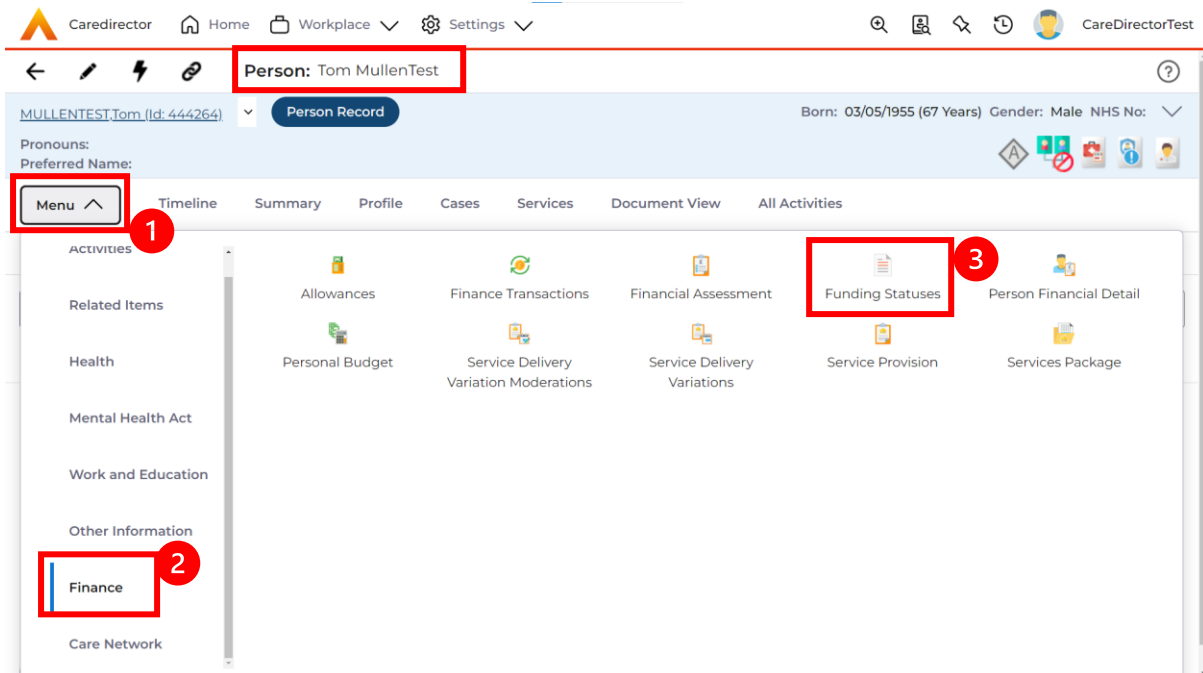
3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.

The screenshot shows the CareDirector interface with the 'Services' tab selected. A red box highlights the 'Menu' button in the top navigation bar, with a red circle containing the number '2' next to it. Below the menu bar, a toolbar contains several icons, including a plus sign (+) which is highlighted with a red box. The main content area shows a search bar for records and 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 visible: '220022', 'TEST Tom', '444267', 'Draft', '08/08/2022', and 'Adult Residen'.

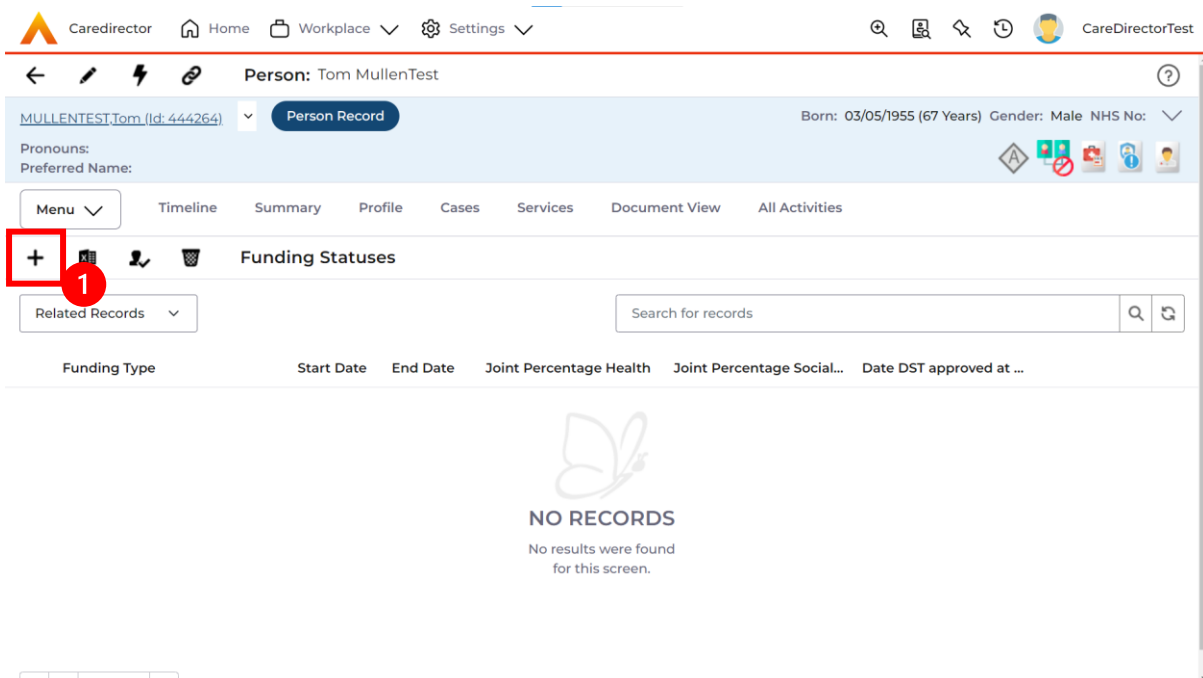
4. Then follow the appropriate section to complete the **Service Provision**.

How to see CHC Funding Agreements

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



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

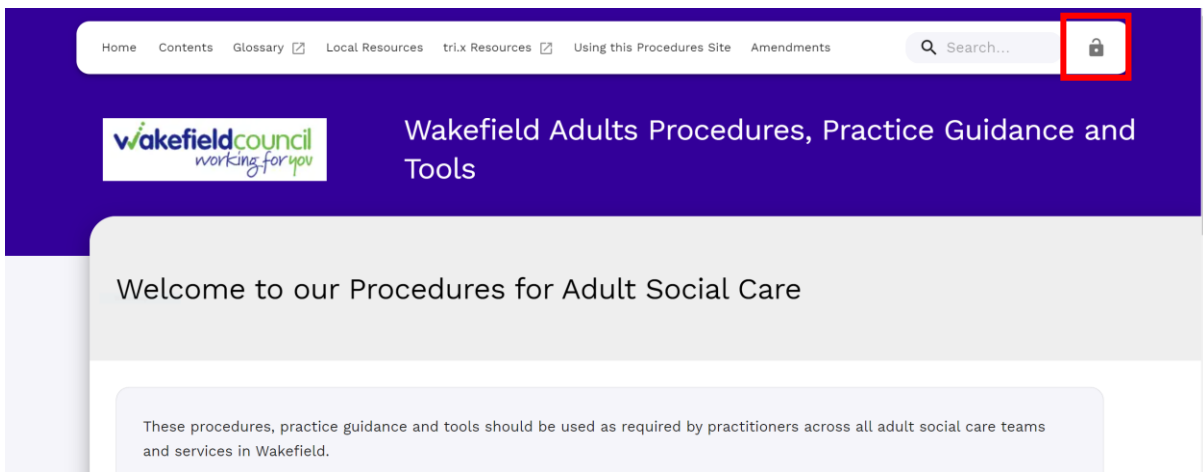


3. Within this screen, under **Funding Type** has the **CHC Funding Agreements**. Fill out the rest of the page and then when done select **Save**.

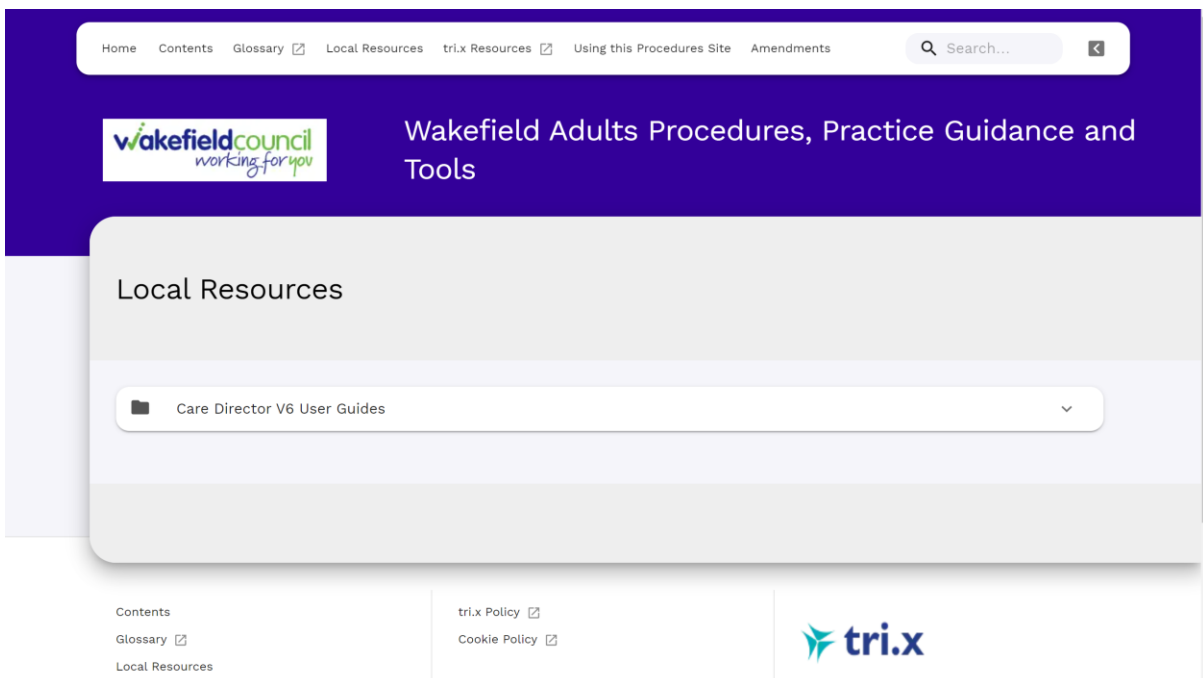
The screenshot shows the 'Funding Status: New' form in the CareDirector system. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The form is titled 'Funding Status: New' and has a 'Details' tab selected. The 'General' section contains a 'Funding Type' dropdown menu with a list of options: CHC - Fast Track, CHC - Fully Funded, CHC - Funded Nursing Care, CHC - Joint Funding, CHC - Not eligible for funding, Full Cost Client, No recourse to public funds, Ordinary Resident, and Self Funder. There is also an 'Additional Information' text field and a 'Person' dropdown menu with 'Tom MullenTest' selected. The 'Information' section includes a 'Created By' dropdown menu and a 'Created On' date/time selector. A red box highlights the 'Save' icon in the top navigation bar, with a red circle containing the number '1' next to it.

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	11/11/2022