



Getting Set up On CoolCare4

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Users and Permissions

Manage User Groups

CoolCare allows you to manage the permissions of a group of Users together. Doing so means you can set the rules for the permissions a user has, based on their membership of that “User Group”. You can create as many User Groups as your like (go wild!).

By setting up a User Group, you can assign the level of access the members of that User Group have. You can then manage the permissions of each User Group to determine what they can and cannot see as well as what they can do in CoolCare4.

The access to specific homes and User dashboard settings are set on the individual User settings – have a peek at “Manage User Groups” to learn how to update User settings.

Full Access User Group

Full Access users will be able to access every section on CoolCare4 and will be required to set up new User Groups and new User logins. You cannot amend or delete this User Group. You must ensure that you have at least one user set up with this level of access within your company in case any System Configuration settings need amending or new users need setting up.

How to Add User Groups

- Click on your name in the top right corner of the screen to access the System Menu.
- Select “Manage User Groups” from the drop-down list.
- Press the “Insert” button to add a new User Group.
- Give your User Group an easy to identify name.
- Tick the appropriate options to give or remove access to CoolCare features for the User Group.
- Click on each available tab and select the permissions you want the User Group to have in that feature.
- Click “Save” once completed.

Name	
Full Access	
Head Office Staff	■
Carer	■
Payroll	■
StaffBasic	■
Enquiry	■



General Tab

In the General Tab, you will select the areas of CoolCare the User Group has access to in CoolCare4.

Upon ticking each of the boxes, the respective permission tabs will become available on screen for further configuration. You need to access each of the individual tabs to specify permissions for the User Group within these features. Each time you tick a permission, more sub-categories of permission options may appear for you to select. If a permission is not selected, the User Group will either not be able to see the section or will be restricted in what they can do within that section of the feature.

Handy Hint: “System Configuration” is where group wide settings are configured. Any settings configured in here will affect all of the homes within the group. Having “System Configuration” access gives the User lots of power.

We recommend that you restrict availability to your most senior (and/or most trusted!) staff only. That way, you’ll reduce the risk of any wholesale errors. Users can do most things on CoolCare4 without this permission so be selective in which User Groups have this config setting.

Care Home Tab

In the Care Home tab, you can configure the User Group access to sections within the Care Home section on CoolCare4 - including Home Setup, Enquiries, Ledgers, Maintenance, VNB Configuration and the Rota Setup. These sections are colour-coded in purple in CoolCare4.

You need to select the level of permission you give for each section of the Care Home feature on CoolCare4. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View
- Insert
- Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section.

The access to specific homes is set on the individual User settings – have a peek at “Manage Users” to learn how to update User settings.

Staff Tab

This is where you configure the User Group access to sections in the Orange Staff section of CoolCare4 - including Staff Records, Payroll, Timesheets, Calendar and Rota. These sections are colour-coded in orange in CoolCare4.

You need to select the level of permission you give for each section of the Staff feature on CoolCare4. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View
- Insert
- Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section.



Residents Tab

In the Residents tab, you can configure the User Group access to sections in the Residents section of CoolCare4, including Resident records and Billing. These sections are colour-coded in green in CoolCare4.

You need to select the level of permission you give for each section of the Residents feature on CoolCare4. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View
- Insert
- Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section.

Lookups Tab

In this section, you configure which Lookups the User Group can access. In CoolCare4 Look-ups are configurable fields which can pre-populate records based on information entered into them.

Look-ups have an impact on all your homes in your group and may affect how data shows in your reports. Before you add permissions to amend look-ups, just have a quick check whether the likely members of this User Group are the right people to have this much influence.

New User Group

- General
- Care Home
- Staff
- Residents
- Lookups

Name Required

- Head Office User
- System Configuration
- Enable Home Section
- Enable Staff Section
- Enable Resident Section

[← Back](#) [H Save](#)



Manage Users

CoolCare4 lets you manage the access level of each User through “Manage Users”. In this section you can set up individual User login IDs and specify their User permissions Group.

You will need to set up a User Group to set the permission level before you add Users. If you haven’t added any User Groups yet, see “Manage User Groups” for assistance.

Creating a New User

- Click on your name in the top right corner to access the system menu
- Select “Manage Users” from the drop-down list
- Press the “Insert” button
- Fill out all required fields
- In Home Access, select which homes the User should have access to.
- Click “Save” once completed

Users will only be able to see Group or Company level information if they have access to all homes in the Group or Company. If you want the User to see Group or Company level information, make sure you give them access to all the relevant homes.

The screenshot shows the 'New User' form in the CoolCare4 system. The form is titled 'New User' and is located within a system menu. The menu is open to 'Manage Users' and shows other options like 'System Configuration', 'Manage User Groups', 'Admin Adjustments', 'Lookups', 'Custom Reports', and 'Logout'. The form has five input fields: 'Full Name' (Required), 'Login Name' (Required), 'Email Address', 'User Group' (Required, dropdown menu), and 'Password' (Required). Below the fields are 'Back' and 'Save' buttons. To the right of the form is a 'Home Access' section with a 'Select All' and 'Clear All' button, and a list of homes with checkboxes: 'Caring East', 'Caring South', 'Jay's Home', 'Stephen's Home', 'James Home', 'Matt's Home', and 'Heidi's Home'.

Dashboard Widget

The widgets available within CoolCare4 displays useful summary information or provides shortcuts to quick tasks to allow the User to perform regular tasks quickly or view important information easily.



The widgets are displayed on the first page the User sees when they log on to CoolCare4, which we call the Dashboard. The widgets each User is able to see needs to be specified in their User profile.

- Select a User from the User list.
- Click the Dashboard Widgets tab.
- Tick the widgets the User should have access to.
- Click “Update Widgets”

Group Setup

System Configuration

The System Configuration is used for setting group wide parameters on CoolCare4. Anything set in here will affect every home in your database. Some of these settings can also be configured at individual home level, if this is possible there will be a tick box that can be ticked to set these settings at Home Level.

How to Update Settings

- Click your name in the top right corner to access the System Menu
- Click “System Configuration”
- Update settings.
- Click “Save”

User - John Smith

General | **Dashboard Widgets** | Home Access

Dashboard Widgets

- Staff on Shift
- Occupancy Percentage
- Resident Absences
- Supervisions and Appraisals
- Common Tasks

[← Back](#) [Update Widgets](#)

System Configuration

Caring East | John Smith

System Configuration

Manage Users

Manage User Groups

Admin Adjustments

Lookups

Custom Reports

Logout

Invoicing | Staff

General

Export Program: SageLine50

Invoice Template: Template 2

Collect Direct Debit After: 15 Days

Invoices due after (excluding direct debits): 5 Days

Invoice Header Description ?
System Config: \$TYPE Care for \$CLINAME in Room \$ROOM at \$ days, from \$SD to \$ED

Invoice Item Description ?
Fees at £\$WEEK per week

Updating system configuration settings can have irreversible effects on CoolCare, if you are unsure what a configuration option does please check with the support team before making any changes on 0113 385 3853 or email support@coolcare4.co.uk



Invoicing Settings

These are the settings that will need to be configured for your finance department to run payroll and invoices to the best of their ability in CoolCare4. Some of these settings are essential to the running of Payroll and Invoicing, such as the export program for both Invoicing and Payroll.

Export Program

This is where you select the accounting software package you use. Simply select the accounting software from the drop-down box to set this.

Selecting the Export Program applies changes across all the homes in your group. You can only choose one export program across all your homes.

Invoice Templates

You can configure what your invoices will look like when printed off using the pre-set templates available in CoolCare4. Examples of the available templates are available on request. Please email our Support Team at support@Coolcare4.co.uk to request the examples.

Invoice Headers and Item Description

These fields are used to configure the text that will be generated on the invoices. Enter what you want to display for the invoice's header, footer or items.

Variable keywords can be used to customise the invoice when printed. For example, you can use the variable \$CLINAME, which will display the relevant resident's name when the invoice is printed. To view all available variable keywords, hover your mouse cursor over the '?' next to the title. These variables are case sensitive so you will need to make sure when entering them they are exactly how they are stated in the tool tip.

The invoice text can also be overridden at home level and can even be tailored the per fee contract. This should be used if your invoices have different textual content for different homes, or contracts.

See the Home Settings section for how to amend the invoice text at Home level and the Invoicing Guide for amending an individual fee contract invoice text.



Collect Direct Debit After

Use this field to specify in the system when you will collect direct debit payments, from the date of the invoice. Some accounting packages may require this information when importing the data from CoolCare4.

Invoices Due after

Use this field specify in the system how long after invoices are sent out that payment is due. Some accounting packages may require this information when importing the data from CoolCare4.

Group Logo

Use this to upload your company's logo which can appear on invoices. The logo image has to be a **.jpeg** file and be no larger than 2MB. We suggest the image's resolution to be 200x100, as any larger may cause invoices to load slowly when processing.

Headers and Footers

Similar to the invoice headers and footers mentioned above, these fields allow you to configure the text that is generated on certain documents. This includes cash receipts, cheques, standing orders, direct debits and BACs.

Like the invoices, you can use variable keywords to customise these fields, and can also be overridden at home level.

Document Type	Header (0/500)	Footer (Character Count)
Cash		12/1000
Cheque		56/1000 Group CHEQUE Footer Please make cheque payable to \$CHQTO
Standing Order		13/1000
Direct Debit		19/1000 Group Footer \$DDCOL
BAC		30/1000 Group BAC Footer \$CHQTO \$DDCOL

VAT Codes

Use this field to specify the VAT amount for each different VAT code you use. Each fee contract created on CoolCare4 requires this, therefore you must set the standard default in the 'VAT Code for fee contracts'. Some accounting packages may require this information when importing the data from CoolCare4.

The VAT Codes are linked to the Invoicing in CoolCare4, you can set a default VAT Code for Fees and have the ability to select other VAT Codes for extra items like Billable Extras.



VAT Codes

VAT Code for fee contracts
T0

VAT Code Rates

EX	0.00	%
T0	0.00	%
T1	0.00	%
T2	0.00	%

Staff Settings

Invoicing **Staff**

Holidays

Holiday Year Start Date: 01/01/2021

Holidays Per Home

Exceed Holiday Allowance

EU Calculation Factor: 50.00 %

Include Holiday Hours in EU Calculation

Include Absence Hours in EU Calculation

Include Other Hours in EU Calculation

Bank staff holiday pay: "As accrued"

Payroll

Pay Type: Pay Rates

Pay Pool Staff from Main Home

Appraisals & Supervisions

Between Appraisals: 12 Months

Between Supervised Sessions: 3 Months

Holidays Per Home

If each of your care homes' holiday year is different within the group then this box should be checked. You must then set the holiday year start date in the Home set-up section. Please note, if you select "Holiday Per Home", the Group Holiday Year Start Date will be ignored.

Holiday Year Start Date

This is the start date of your current holiday year. This will affect all staff members holiday entitlement within your group. If "Holidays Per Home" is selected, the Holiday Start date will be ignored. To set the Holiday Start Date by group, ensure Holidays Per Home is not selected.

Exceed Holiday Allowance

This will enable staff to take more holidays than they are entitled to for the holiday year. If this is not checked a warning will be presented to Users if they attempt to authorise holidays when the staff member has already exceeded their yearly entitlement.

Pay Type

Depending on how you manage your payroll, the way CoolCare4 works will change. You therefore need to specify what payroll package you use or whether you will use the Pay Rates setting.

Between Appraisals



This is the renewal period for your staff Appraisals. This can be set in either months or weeks. CoolCare will calculate when the next appraisal is due based on this information. When staff do not have any appraisal information, their current appraisal has expired or will soon expire, this will feature in your dashboard widgets and exception reports.

Between Supervised Sessions

This is to set the amount of time between supervised sessions being due. This can be set in either months or weeks. CoolCare will calculate when the next supervised session is due based on this information.

Break Deduction

Break deductions enables the system to automatically deduct time from shifts where staff members have worked more than a certain number of hours, for breaks, on the timesheets. You must enter the number of hours a staff member needs to work in order to be entitled to the deduction and the minutes that are to be deducted when these hours have been reached. The reductions are cumulative.

Whilst the rules for Break Deductions will be set per group, you can decide against each position, per home, whether you want those rules to apply. Break deductions will only apply to shifts set up under the position that have break deductions enabled. See “Staff Positions” for how to set Break Deductions for each position.

Break Deductions	
Break deductions are applied to all shifts that have break deductions enabled. ⓘ	
After Working 4 Hours	Deduct 15 Minutes
After Working 6 Hours	Deduct 15 Minutes
After Working 12 Hours	Deduct 30 Minutes

Staff Positions

On CoolCare4 Staff Positions are managed at both group and home level. The positions themselves are inserted at group level, whilst the shifts and Pay Elements are set up at home level.

Inserting a Position

- Click on your name in the top-right corner of CoolCare to access the System Menu
- Click Group Positions
- Click Insert
- Enter a name for the position, select what department it belongs to and tick each home that the position needs to be available in



- Click on the Training tab and select each training course whether it is mandatory or not
- Click Save

Allocate Positions

Position Name: Department:

Homes Training

Select All, None

- Laburnum Cottage
- Oak House
- Maple House
- Training Grange
- Marvellous Grange
- Cedar Lodge
- Gilbert House
- [Partially visible]

Save

Training

When you set up Staff Positions you have the ability to specify if a training course is required or not for that position. This allows you to keep a track of what training is still outstanding for a staff member if it is mandatory for their position. Mandatory training is any training that a staff member needs to have in order to work, these training courses can be monitored via the Training Compliance dashboard widget and report.

Training Compliance Dashboard Widget

Staff members training is something that needs to be monitored, especially their mandatory training. The Training Compliance widget displays any staff that has incomplete or expiring soon mandatory training, there are two levels to the widget. If you are viewing the widget at group level then it will display the courses that are incomplete or expiring soon for the whole home. When you are at home level it will show a breakdown of the courses incomplete or expiring soon for each individual staff member. You can also view the list by the qualifications that have staff members with incomplete courses or courses that are expiring soon.

Training Compliance							<input checked="" type="radio"/> By Staff	<input type="radio"/> By Qualification	
Name	Incomplete Courses			Courses Expiring Soon					
	Not Booked	Booked	Total	Not Booked	Booked	Total			
James Kirk	5	0	5	0	0	0			
Jean Luc Picard	5	0	5	1	0	1			
Leonard McCoy	5	0	5	0	0	0			
Montgomery Scott	2	0	2	0	0	0			
William T Riker	4	0	4	0	0	0			



Training Exception Report

Where the dashboard widget displays a quick view of the number of mandatory courses that are incomplete or expiring soon the Training Exception Report shows a full breakdown in detail of the mandatory and additional courses that are incomplete or expiring soon. This is better for assessing the overall compliance of training courses for staff members. The report can be accessed by following the below steps.

- Expand the Staff section on the left-hand side
- Click Reports
- Click Training Exception Report

Home Setup

Anything configured at Home level will only affect the individual care home it has been set for. These settings will not affect any other homes in the group.

Updating Home Settings

- Click “Care Home” from the left Menu.
- Click “Home Setup”
- Click the Settings tab.
- Update settings.
- Click “Save”

Updating home settings can have irreversible effects on CoolCare, if you are unsure what a configuration option does please check with the support team before making any changes on 0113 385 3853 or email support@CoolCare4.co.uk



General Rooms Staff Positions Break Deductions **Settings** Lookups

Home Settings

Staff & Payroll Settings

Holiday Start Date Required
01/04/2020

Geolocation Required
England

Payment Frequency Required
Weekly

Sage Settings

Sage Department
5

Sage 200 Cost Centre
20

Sage 200 Department
027

Rota/Timesheet Configuration

Snap To Shift Limit Time Required
15 Minutes

Before Shift Start Required
55 Minutes

Hour Rounding Interval (Not Snapped Only)
15 (0.25 hours) Minutes

After Shift Start Required
5 Minutes

Arrive Late Dock Interval
20 (0.33 hours) Minutes

After Shift Ends Required
55 Minutes

Before Shift Ends Required
20 Minutes

Leave Early Dock Interval
6 (0.1 hours) Minutes

All Shift Break At Midnight
 Snap To Pre-Set Shift Times
 Link Absence To Rota

Budget Tolerances

Under	%	Over	%

The Under and Over Budget Tolerances are a percentage used when checking whether the number of shifts and hours are acceptable vs the budgeted shifts and hours.
[Show Examples](#)

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in and clock-out times to give suitable decimal values when it is not shift snapped.
[Show Examples](#)

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in times to the next minute interval to give suitable decimal values.
[Show Examples](#)

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-out times to the previous minute interval to give suitable decimal values.
[Show Examples](#)

Staff & Payroll Settings

Holiday Start Date

This is where you set the start date of your current holiday year. This will need to be updated annually and resets the accrued holiday of each staff member. This setting only appears if the “Holidays by Home” setting is ticked in System Configuration.

Geolocation

Geolocation is the location where the care home is situated. This information is used to specify if a statutory holiday and increased rates are applicable for this home.

Payment Frequency

This is the frequency in which the care home will run payroll. Some payroll software may require this information when uploading hours from CoolCare4.

Rota/Timesheet Configuration

These settings control whether a staff member’s ‘clock ins/outs’ snap to a predefined shift and whether any deductions should apply if they clock in early or out late. Shift definitions are set up within the staff positions. ‘Snapping to shift’ is where the timesheets will automatically correct hours to a predefined shift if staff have clocked in close to shift start / end times.



Rota/Timesheet Configuration

Snap To Shift Limit Time <small>Required</small> 15 Minutes	Before Shift Start <small>Required</small> 55 Minutes
Hour Rounding Interval (Not Snapped Only) 15 (0.25 hours) Minutes <small>When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in and clock-out times to give suitable decimal values when it is not shift snapped. Show Examples</small>	After Shift Start <small>Required</small> 5 Minutes
<input type="checkbox"/> All Shift Break At Midnight <input checked="" type="checkbox"/> Snap To Pre-Set Shift Times <input type="checkbox"/> Link Absence To Rota	Arrive Late Dock Interval 20 (0.33 hours) Minutes <small>When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in times to the next minute interval to give suitable decimal values. Show Examples</small>
Budget Tolerances Under <input type="text"/> % Over <input type="text"/> % <small>The Under and Over Budget Tolerances are a percentage used when checking whether the number of shifts and hours are acceptable vs the budgeted shifts and hours. Show Examples</small>	After Shift Ends <small>Required</small> 55 Minutes
	Before Shift Ends <small>Required</small> 20 Minutes
	Leave Early Dock Interval 6 (0.1 hours) Minutes <small>When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-out times to the previous minute interval to give suitable decimal values. Show Examples</small>

Snapping to Shift Control

Before Shift Start

This is how long before a shift starts that a staff member can clock in and it will snap to shift.

After Shift Ends

This is how long after a shift ends that a staff member can clock out and it will snap to shift.

Snap to Shift Limit Time

This is how long after a shift starts and how long before a shift ends that a staff member can clock in or out and still snap to their shift

All of the above rules must be followed in order for a shift to snap to shift.

Deduction

After Shift Start and Arrive Late Dock Interval

After Shift Start is how long after the shift has started that the staff member can clock in before they are deducted. Arrive Late Dock Interval is how many minutes should be deducted.

Before Shift Ends and Leave Early Dock Interval

Before Shift Ends is how long before the shift has ended that the staff member can clock out before they are deducted. Leave Early Dock Interval is how many minutes should be deducted.

Hour Rounding Interval (Not Snapped Only)

If the clock in and out does not snap to shift, the clock in time will be rounded up to the next time in the Hour Rounding Interval and the clock out time will be rounded down to the next time in the Hour Rounding Interval. For example, if the Hour Rounding Interval is set to 15, if a staff member clocks in at 08:16 their clock in time will be rounded up to 08:30 and if they clock out at 17:14 it will round their clock out time down to 17:00.

All Shift Break at Midnight



This setting applies to any overnight shifts on your rota. When enabled, any shifts that are split at midnight that snap to a shift definition will no longer have breaks deducted from them.

Link Absence to Rota

This setting allows to absences to be authorised only if the staff member has a rota shift on the same day as their requested absence. If the setting is disabled then absences can be authorised on any days.

Sage Settings

In here you can set the Sage specific settings. Some versions of Sage require this information when importing invoices.

Sage Settings

Sage Department

Sage 200 Cost Centre

Sage 200 Department

Room Settings

Here you can enable the Room Recommended Weekly Fee, which adds a field to each room's settings where you can input a standard weekly fee.

Room Settings

Enable Room Recommended Weekly Fee

Home Variance

This is the expected hours per day in the home, and a % variance of those hours. The timesheet daily totals compare against these values and will display red, green or white if the actual hours different from the variance hours.



Home Variance				
	Standard		Variance	
Monday:	10.0	Hours	10.0	%
Tuesday:	10.0	Hours	10.0	%
Wednesday:	10.0	Hours	10.0	%
Thursday:	10.0	Hours	10.0	%
Friday:	10.0	Hours	10.0	%
Saturday:	10.0	Hours	10.0	%
Sunday:	10.0	Hours	10.0	%

As you can see in the screenshot below if the hours are within the standard hours, they are white. If below they are green, and if above they are red.

You can also see that because the variance is 10% and the hours are 10 that 9 hours shows as within the target.

Worked Hours Total:	44	44	0	10	5	20	9
----------------------------	----	----	---	----	---	----	---

Invoice Settings

In these fields you can specify the invoice footer descriptions per home. In order for these to display on the invoice ensure that you have checked the 'Use Home Footers' in the system configuration settings.

Invoice Settings
BAC Footer St George's Care Home 32 St George's Road, Beccles NR34 9YQ
Cheque Footer Cheque Footer
Standing Order Footer Bank Address Details Company Address
Direct Debit Footer Bank Address Details Company Address
Cash Footer Bank Address Details Company Address

Staff Positions

Whilst the Staff Positions are set up at group level there are also some settings that need to be configured for the Positions at Home Level.



General Rooms **Staff Positions** Break Deductions Settings Lookups ▾

Staff Positions

Search Position

Position	Department
CA	Care
Care Assistant	Care
Carer Night	Care Nights
Deputy Manager	Deputy Manager
Kitchen	Kitchen
Maintenance	Maintenance
Nurse	Care Days
SAP	Nursing
Senior Carer	Care Days
Senior Carer Night	Care Nights
Unit Manager	Management

1 / 1 (11)

Shift Definition

Shifts are used for snapping to shift on the timesheets and for planning shifts in the rota.

General Rooms **Staff Positions** Break Deductions Settings Lookups ▾

Position: CA Department: Care

Shift Definitions Codes Bank Staff Codes Break Deductions

Name	Start	End	Period	Deduct Breaks
Full Day	07:00	19:00	Long Day	<input checked="" type="checkbox"/> <input type="checkbox"/>
Morning	08:00	14:00	Morning	<input checked="" type="checkbox"/> <input type="checkbox"/>

Inserting a Shift

- Select a position from the positions list.
- It should open on the 'Shift Definition' tab
- Click 'Insert'
- Enter the details:
 - Period: this relates to the day period which will be used to flag under/over budget staff within the rota.
 - Deduct Breaks: this will enable the break deduction set in system config to apply to this shift.
- Click 'Save' when completed.

Pay Elements must be set up to run Payroll and shift definitions must be set up in order to assign shifts in the Rota.

Pay Codes/Element

Payroll elements and codes are used within the payroll report. If the position has a different code for bank staff and permanent staff then you will need to enter the codes or elements into codes and bank



staff codes. Special Days can be any days that you would pay your staff an enhanced rate of pay such as Christmas Day or New Year's Day, you have 4 of these available for use. To set up the days that the Special Days are used please see the Statutory Holiday section of this guide.

Inverting Pay Codes/Elements

- Click on Care Home
- Click Home Setup
- Click Staff Positions
- Select a position from the positions list.
- Click 'Codes' or 'Bank Staff Codes' tabs
- Enter the rates or elements
- Click 'Save' when completed.

On CoolCare4 you do not need to separate your staff positions between bank and permanent because you can set up pay codes for permanent staff and bank staff on the same Staff Position.

Rooms

This is where you insert all your rooms per home.

Inverting a Room

- Click 'Care Home'
- Click 'Home Setup'
- Click 'Rooms'
- Click 'Insert'
- Enter the room's details.
- Click 'Save' when completed.

Group Lookups



In CoolCare4 Lookups are configurable tables which can pre-populate fields based on information entered into them. Group lookups will be available across all homes on CoolCare4.

Accessing Group Lookups

- Click your name in the top right corner to access the System Menu
- Click “Lookups”

The screenshot displays the 'Lookups' section of the CoolCare4 system, organized into three main categories:

- General Lookups:** Contains two items: 'Maintenance Assignees' (indicated by a house icon) and 'Enquiry Sources' (indicated by a house icon).
- Staff Lookups:** Contains eight items, each with a person icon: 'Departments', 'Professional Classification', 'Qualifications', 'Statutory Holidays', 'Ethnic Origin', 'Reason For Absence', 'Reason For Leaving', and 'Day Periods'. Additionally, there are two items with a person icon: 'Agency Details' and 'Reasons For Agency'.
- Resident Lookups:** Contains eight items, each with a document icon: 'Dependency Level', 'Funding Type', 'Ledger Item Types', 'Nursing Band', 'Billing Contract Terms', 'Permanency Type', 'Suppliers', and 'Supplier Types'.

General Lookups

Maintenance Assignees

Used in the maintenance section, these specify who can be assigned to maintenance tasks. The lookup includes their name and email address.

Enquiry Sources

Used in enquires, these are different places where a potential resident may have heard about the home. The lookup is just the name of the source, no further information is required.

Staff Lookups

Department

This lookup is specified to show as an option in the Staff Position. Your staff positions will then be classed by these departments. For example, you may have a department for “Care” and one for “Maintenance”. These departments link to the staff positions only, not the rota.

Professional Classification

This is a list of all professional classifications within your care homes which can be associated to staff member files. For example, RGN.

Qualification



This is for setting up what Training Qualifications are available to be assigned to a staff member. You can specify whether they are renewable and how long they are valid for. Training courses must be in here to be able to be added in the training calendar and on the Staff Record.

If you set a renewal period for a training course, it will highlight whether any of your staff's training records have expired or are due to expire.

Statutory Holiday

This is for setting up which days in the year are Statutory Holidays. You can specify special pay codes for each day and what part of the UK they are valid in.

You can specify what pay code you will pay staff members for if they work on these days when inserting them. This enables you to pay double time or other rates on specific bank holidays like Christmas Day. For more information on this please see Pay Codes/Elements under the Home Level Staff Positions in this guide.

Ethnic Origin

This is a list of all ethnic origins which can be associated to staff member files. You can insert additional ones if required.

Reason for Absence

There are standard reasons for absence that are automatically inserted in CoolCare4. If you require additional ones or want to remove any of the standard ones you would use this Lookup. The reason must be in here for you to be able to use it when creating an absence in the calendar.

Reason for Leaving

There are several standard reasons that are included as defaults on CoolCare4, however if you need to insert additional ones you can which are used when processing leavers.

Day Period

Day Periods are used in the rota setup and rota. They are used to aid monitoring if you have the correct level of staff in the home at the right time.

Each shift you add to CoolCare is assigned a day period e.g., early, late. When shifts are added to the set-up rota, CoolCare4 will count how many shifts of each day period there are and create budgets for each shift group, based on the day periods the shifts you have selected are allocated to. On the actual rota CoolCare4, when staff are assigned to shift patterns, it will indicate if you are under or over staffed against your budget by day period. For more information on the Rota please refer to the Rota guide.

Agency Detail

Used to input names of different agencies that may need to cover shifts on the rota. When assigning a shift to agency, these will be in the "Name of Agency" field.

Reason for Agency

Different reasons that agency cover is needed. When assigning a shift to agency, these will be in the "Reason for Agency" field.



Resident Lookups

Dependency Level

These are used in the Residency Details section of a resident record, specifying the level of care a resident may need. For example, low to high risk.

Funding type

This section allows you to create the types of funding that are available in your care home i.e., Private, LA.

Ledger Item Types

Adding Ledger Item Types sets the items that are available in the different ledgers on the system i.e., gardening, provisions/food etc.

Nursing Bond

Like the dependency level, these are used in the Residency Details, specifying the level of nursing care a resident may need.

Billing Contract Terms

This is used for setting up your billing contracts terms for each of your financial contracts i.e., respite, private respite, LA etc.

- 'Anonymise Invoices' allows you to use a unique reference number on invoices rather than the Resident's personal details.
- 'Bill Discharge Date' controls if the payee will be charged for the date of discharge.
- 'Bill Additional days....' options control how many additional days the payee will be charged after discharge/death.
- If the billing contract terms is a private contract you will need to enter the payees address per account, alternatively enter the address into the billing contract terms and it will automatically populate into the account.
- CoolCare can automatically reduce fee's when a resident has been absence for a period of time, enter the reduction % and the number of days the resident should be absent before the reduction will start.

Permanency Type

Used in the Residency Details section of the resident record, this specifies whether a resident is permanent, temporary or otherwise.

Suppliers

These are the actual Suppliers for the billable extras e.g., the newsagent that newspapers come from.

Supplier Types

This is used for setting up the types of billable extra types that your care homes use e.g., Chiropody, Hairdressing.



Home Lookups

These lookups are customised at home level, and only apply to the home you create them for.

- Click 'Care Home'
- Click 'Home Setup'
- Click 'Lookups'

Nominal Codes

Nominal codes are used within Sage and similar accounting software, you should specify all nominals that are associated with fees or billable extras in this Lookup.

Billable Extra Types

Billable extras need to be associated with a nominal code to ensure they have the correct description when importing your invoices to your accounting software. Before inserting Billable Extra Types make sure you have set up the nominal codes for the Billable Extra Types you are inserting.

Care Types

Although care types are not a standard financial lookup, if you allocate a default nominal for each care type it will ensure that when invoices are generated in CoolCare4, they will have a nominal code associated with the resident's care type, which your accounting package may require when importing.