



Occupancy Management and Enquiries

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Managing Occupancy

CoolCare4 allows you to manage the Occupancy of your care home within the system and keep track of the types of Occupancy in your care home.

Navigating to Occupancy Management

- Log into CoolCare4
- Expand the Care Home section on the left-hand side
- Click Occupancy Management

Occupancy Overview

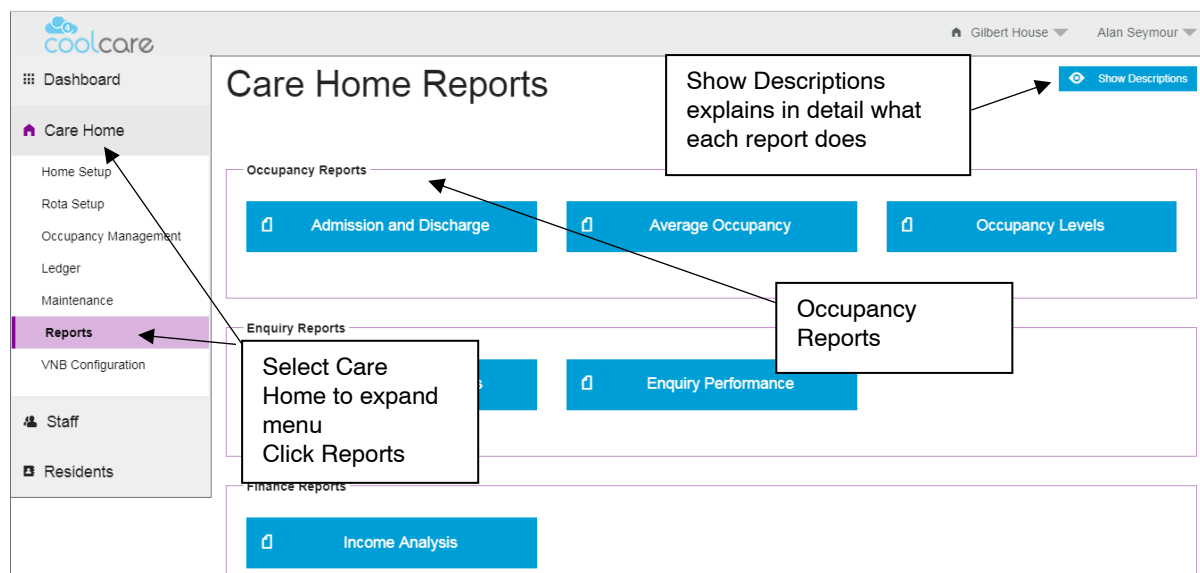
The Occupancy Overview breaks down the current occupancy of your home telling you in both fractal and percentage how many beds are currently filled. It also provides a breakdown of the residents by their Funding Type and how many potential discharges have been recorded on the system.

Reports:

Occupancy Report

As well as the Occupancy Overview you can view several reports which help you analyse the occupancy you have had at your home. To get into the report section follow the below steps.

- Expand the Care Home section on the left-hand side of the screen
- Click Reports



Admission and Discharge

The admission and discharge report, allows you to select a date range for a full breakdown of the admissions and discharges within the date range specified. The report will print out as a CSV file, there are multiple tabs along the bottom of the Excel file which give you a breakdown of specific details.

- Navigate to the Occupancy Reports



- Click on Admission and Discharge
- Select the dates you want to view the report from and to
- Click Produce Report
- Once the report has printed navigate through the different sections of the report using the tabs along the bottom of the file

Average Occupancy

This report allows you to select a date range for a breakdown of the average occupancy within a period. If you were to select a period of a month the report would breakdown the occupancy weekly for you, if you were to select a period larger than 3 months the report would give you a monthly breakdown of the period. Within the report it specifies the average of beds used and free was, how many slots were used and free and a breakdown of the Fees including a predicted loss due to unoccupied beds. This report prints as a PDF file.

- Navigate to the Occupancy Reports
- Click on Average Occupancy
- Select the dates you want to view the report from and to
- Click View Report

Occupancy Levels

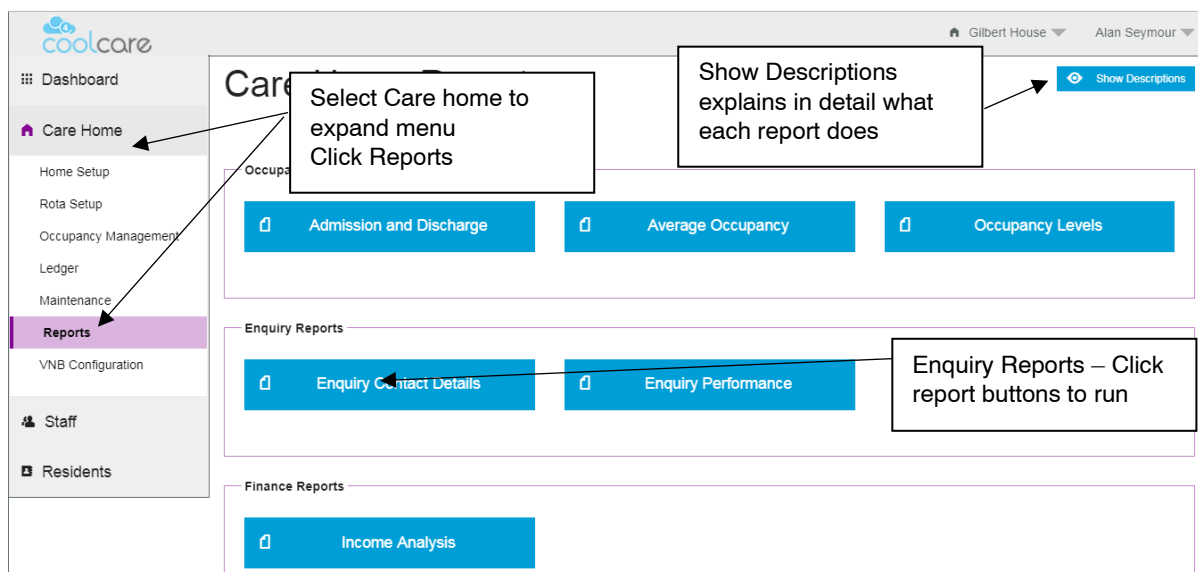
This report gives a current view of the occupancy in your care home. It gives you a current breakdown of how many beds are in use and how many beds are in use by each type of fee contract including min, max and average current fees. It also flags up how many residents you have in the home that do not have contracts in place. A graph shows you the increase or decrease in your occupancy across the last 12 weeks.

- Navigate to the Occupancy Reports
- Click on Occupancy Levels

Enquiry Report

You can run several reports to help you monitor your enquiries on CoolCare4, these will help you keep on top of how well you are transferring Enquiries into live residents.

- Expand the Care Home section on the left-hand side of the screen
- Click Reports



Enquiry Contact Details

This report will print a list of the contact details for all current Enquiries. The contact details are broken down by the contact details of the prospective resident and the enquirer.

- Navigate to Enquiry Reports
- Click Enquiry Contact Details

Enquiry Performance

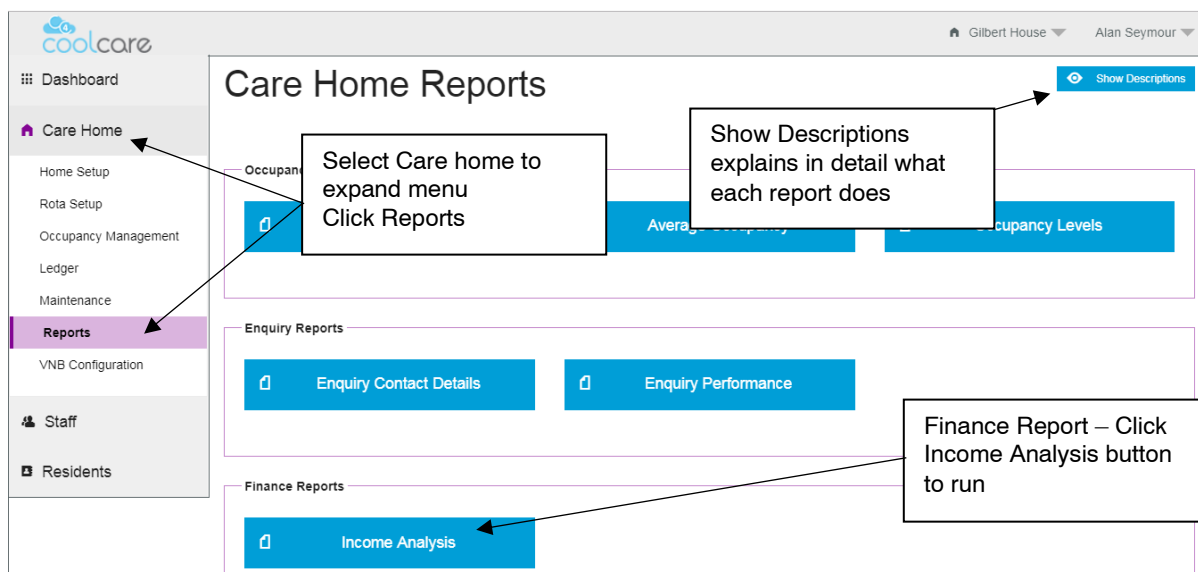
This report will allow you to assess the time taken to complete enquiries, how many enquiries have been turned into admissions and how many active and inactive enquiries there are as both numbers and a percentage against the overall number of enquiries.

- Navigate to Enquiry Reports
- Click Enquiry Performance
- Select the date range for the report
- Select what format you want it to display as
- Click Produce Report

Finance Report

The financial reports on CoolCare4 are reports that allow you to analyse the financial stability and financial effectiveness of your care home.

- Expand the Care Home section on the left-hand side of the screen
- Click Reports



Income Analysis Details

Description – Emailed Vicky at Ideal Finance for a description for this report.

- Navigate to Finance Reports
- Click Income Analysis
- Select the month you want to view the data for
- Click Produce Report

Enquiry Management

In CoolCare4 you are able to manage the enquiries you receive and take them straight through from start to finish keeping track of each stage of the enquiry process as you go. To get to the Enquiries section follow the below navigational steps.

- Expand the Care Home section on the left-hand side
- Click Occupancy Management

Enquiries List

In the main Enquiries list you will see all active enquiries as a default. Their statuses are colour coordinated to indicate if they are overdue or not. If the Status is showing as red then it means that there are overdue actions on the Enquiry.

New Enquiry

When a new enquiry has been submitted to the home you would need to log it on CoolCare4, in doing this you will keep an accurate record of how many enquiries the home has received. To insert a new enquiry please follow the below steps.

- Navigate to the Occupancy Management section on CoolCare4
- Click New Enquiry
- Fill out the form on the first page and click next.
- Tick the appropriate boxes on the second page.
- For each box you tick additional options will be presented with extra options.



coolcare

Gilbert House Alan Seymour

Occupancy Management

Occupancy Overview

Occupancy (%)	Private %	Average	No. Residents by Funding Type				Potential Discharges
15 / 19 (78.95%)	20%	874.69					

Enquiries Overview

Total Enq. [Priv.]	Status						Rsv. paid	Overdue tasks/events	Av. Dys	New enq. (wk)	De-ac. (wk)	WL (U)		WL (A)	
	Act. enq.	WL (U)	WL (A)	On hold	Plnd adm.	Prv.						All oth.	Prv.	All oth.	
2 [0]	0	0	2	1	0	0	0	46	2	0	0	0	0	0	1

To-Do List Enquiries

Filter + New Enquiry

Enq. Ref.	Enquirer	Prospect Name	Status	Funding	Care Type	Stay	Started (days)	Assessment	Visit	Admission
11	Mr Alan Seymour	Mr Alan Seymour	Waiting List Assessed	LA + TopUp	Older Persons Care	Permanent	16/08/18 (77)	16/08/18	16/08/18	
	Mr Alan Seymour	Mr Alan Seymour	Waiting List				17/10/18			

Click New Enquiry to open a new enquiry

This will then open the new enquiry form. This has no required fields and you can complete as many or as few fields as you wish. If the enquiry is made into a resident the relevant information will transfer over

Enquiry Form 1/2

COOLCORES Add Enquiry Step 1/2

Dashboard | Care Home | Home Setup | Role Setup | Occupancy Management | Ledger | Maintenance | Reports | VNA Configuration | Staff | Residents

General

Home: Oak House | Contact Method: | How did they hear about us? | Permanency: | Date of Enquiry: | Assigned To: Alan Seymour

Enquirer Details

Title: | Address Search: Enter the Postcode | First Name(s): | Middle Name(s): | Surname(s): | Email Address: | Landline: | Mobile: | Preferred Contact Method: | Power of Attorney: Neither / Not-disclosed

Address 1: | Address 2: | Address 3: | Address 4: | Postcode: | Enquirer is Prospective Resident: | Relationship to Prospective Resident:

Prospective Resident

Title: | Address Search: | First Name(s): | Middle Name(s): | Surname(s): | Date of Birth: | Age: | Email Address: | Landline: | Mobile: | Preferred Contact Method:

Address 1: | Address 2: | Address 3: | Address 4: | Postcode:

Current Care Details

Current Residence: | Reason for Seeking Care: | Care Type:

Fee Information

Funding Type: | NMS Fee Payer: | Deferred: | Local Authority Fee Pays:

Additional Information on Prospective Resident

Notes:

Contacts

Next | Cancel

Add general information here e.g. who is taking call, method of enquiry, where enquiry heard about the home etc

Enter the details of the person making the enquiry
If the enquirer is also the prospective resident click this box and all details will also be copied to the resident section

Enter resident details here if resident is not the enquirer

Add current care details here and reason why seeking care

Add funding details here if known

Add additional details here

Doctor and Social Worker name can be added by clicking Contacts

Once completed click Next to add tasks on second page



Enquiries Step 2/2

Here you can add tasks for:

- Brochure
- Visit
- Assessment

Add Enquiry Step 2/2

Brochure

Has a brochure been provided?
 Yes No

Visit

Has there been a visit?
 Yes No

Is a visit planned?
 Yes No

When is the visit planned for?
15/11/2018 ⓘ

Exact Date Not Specified

Who will be visiting?

Prospective Resident

Main Contact

Others

Assessment

Add Assessment Info?

Enter yes/no for each task and select any additional information requested in drop down menus

If you answer no to any question more options will allow you to either arrange a date to carry out task or close the enquiry

Here you can either add assessment information by clicking Yes or select No, Complete Enquiry which will save the enquiry with the assessment information task out standing

More information on updating and managing tasks are explained in detail later in this guide

Active Enquiries

Active Enquiries are Enquiries that still have outstanding tasks on them such as an assessment has yet to be carried out or a visit has been planned in.

Filtering Enquiries

When viewing the Enquiries on CoolCare4 you can filter the view to show you Active, Waiting List Unassessed, Waiting List Assessed, Inactive, On Hold or Admitted enquiries. You can also search for a specific Enquiry using their name or their Enquiry Reference



number. On top of that you can filter your results to show enquiries and admissions from enquiries within a date range. To do this please follow the steps below.

- Navigate to the Occupancy Management Section on CooCare4
- Click on the Enquiries tab
- Click on the Filter button to expand the Filter options
- If you are filtering by Enquiry Ref or Prospect Name enter them in the boxes
- If you are filtering by the Start and End Date of either the Enquiry or Admission Date select the dates in the boxes
- If you are filtering by Enquiry Status click on the drop down and tick what statuses you want to show and untick the statuses that you don't want to show.

To-Do List

The To-Do List will display any outstanding tasks and what their due date is, this is defaulted to show only your outstanding tasks, however you can select to view all outstanding tasks by clicking on the filter and ticking All Users and then applying that.

The screenshot shows the CoolCare4 interface. The left sidebar contains navigation options: Dashboard, Care Home, Home Setup, Rota Setup, Occupancy Management (selected), Ledger, Maintenance, Reports, VNB Configuration, Staff, and Residents. The main content area is titled 'Occupancy Management' and includes an 'Occupancy Overview' table and an 'Enquiries Overview' table. Below these is a 'To-Do List' section with a 'Filter' button and a 'New Enquiry' button. The 'Filter' dropdown is open, showing 'All Users' with a checked checkbox. Below the filter are 'Reset' and 'Apply' buttons. A table below shows a single task: Assigned To: Alan Seymour, Task: Visit, Due Date: 01/11/18, Enq. Ref: 68, Enquirer: Mr Ken Dodd, Prospect Name: Mr Ken Dodd, Status: Active.

Occupancy (%)	Private %	Average £	No. Residents by Funding Type						Potential Discharges
			Prv.	LA	LA+T	NHS	Oth.	Unk.	
30 / 32 (93.75%)	20%	743.18	6	16	9	0	0	0	1

Total Enq. [Priv.]	Status					Plnd adm.	Rsv. paid	Overdue tasks/events	Av. Dys	New enq. (wk)	De-ac. (wk)	WL (U)		WL (A)	
	Act. enq.	WL (U)	WL (A)	On hld	Prv.							All oth.	Prv.	All oth.	
17 [2]	16	0	1	4	2	0	22	23	2	0	0	0	0	1	0

Assigned To	Task	Due Date	Enq. Ref.	Enquirer	Prospect Name	Status
Alan Seymour	Visit	01/11/18	68	Mr Ken Dodd	Mr Ken Dodd	Active

Updating Enquiry

You are in contact with an Enquirer and get some updated details you need to be able to update the information in CoolCare4. To do this you can open the enquiry on the system and update these details. To open and update an enquiry follow the below steps.

- Navigate to the Occupancy Management section on CoolCare4
- Click Enquiries
- Use the filter to find the Enquiry you need to update
- Click on the Enquiry to open it



Occupancy Management										
Occupancy Overview										
Occupancy (%)	Private %	Average £	No. Residents by Funding Type						Potential Discharges	
			Prv.	LA	LA+T	NHS	Oth.	Unk.		
15 / 19 (78.95%)	20%	874.69	3	4	9	0	0	0	1	

Enquiries Overview														
Total Enq. [Priv.]	Status				Plnd adm.	Rsv. paid	Overdue tasks/events	Av. Dys	New enq. (wk)	De-ac. (wk)	WL (U)		WL (A)	
	Act. enq.	WL (U)	WL (A)	On hld							Prv.	All oth.	Prv.	All oth.
2 [0]	0	0	2	1	0	0	0	46	2	0	0	0	0	1

Enq. Ref.	Enquirer	Prospect Name	Status	Funding	Care Type	Stay	Started (days)	Assessment	Visit	Admission
11	Mr Alan Seymour	Mr Alan Seymour	Waiting List Assessed	LA + TopUp	Older Persons Care	Permanent	16/08/18 (77)	16/08/18	16/08/18	
12	Mr Alan Jenkins	Mr Alan Jenkins	Waiting List Assessed			Permanent	17/10/18 (15)	17/10/18	17/10/18	

Adding Entries for the Steps

When you update an Enquiry, you will be updating steps in the Enquiry, there are five tasks to the Enquiry, they are:

- Enquiry
- Brochure
- Visit
- Assessment
- Admission

To update an Enquiry step, you click on the relevant step and click the Add Entry button. Any entries that are showing as red are overdue and any entries that are showing as green are complete.

Mr Reginald Perrin | Prospective Resident
 Contact: Mr Reginald Perrin | 077693284787
 Funding: LA + TopUp
 Permanency: Permanent
 Care Type: Older Persons Care

Enquiry Reference: 16
 Next Task: NONE
 Date Due: NONE
 Overdue Tasks: 0

Enquiry Complete 08/11/2018
 Brochure Complete 08/11/2018
 Visit Complete 08/11/2018
 Assessment
 Admission

Planned: Completed: Needs met: Add Entry

Initial Enquiry added by Alan Seymour on 08/11/2018 at 15:01.
 Automatically created Provide Brochure task was completed.
 Automatically created Visit event was completed.
 Enquiry status changed to 'Active' by Alan Seymour on 08/11/2018 at 15:04

Assessment Add Entry

- ♂ Assessment
- 📄 Note
- Task
- ✕ Decline Assessment

- You will then get an option to:
- Update the task - in this case the assessment
 - Add a note
 - Add a Task to the main step
 - Close or decline the step

More details for this are shown on the next page.



Adding Notes

Each step in the Enquiry allows you to add notes to them, these notes when created will show up in the step as a note and are date stamped. They will also display with the title and the body of the note in the contact log along with who entered the note and the date and time it was entered.

- Navigate to the Occupancy Management Section on CoolCare4
- Filter and find the enquiry
- Click on the step you need to add the note to
- Click Add Entry
- Click Note
- Give the Note a title and enter the text into the Note box
- Click Save

Adding Tasks

If an Enquiry has missing tasks when it was initially created you can add these in at a later date. To do this follow the below steps.

- Navigate to the Occupancy Management Section on CoolCare4
- Filter and find the enquiry
- Click on the step you need to add
- Click Add Entry
- Update the step, this could be just putting in a planned date if it is a visit or assessment
- Click Save

Provide Brochure

Whether a Brochure has been provided or not can be a useful tool to see how serious a prospective resident is about becoming a resident. If a brochure has not been provided you can specify the reason why one wasn't provided and add in a date you plan on providing them with a brochure.

Providing a brochure at the New Enquiry Stage

- Navigate to the Occupancy Management section on CoolCare4
- Click New Enquiry
- Fill out the form on the first page and click next.
- Click either yes or no to if a brochure has been provided
- If a brochure has been provided it will ask you to provide a date when it was provided
- If a brochure wasn't provided it will ask for a reason

Providing a brochure by updating the steps

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Brochure step
- Click Add Entry
- Select from the Task drop down Provide Brochure
- Select a due date
- Enter who it is assigned to
- Select a date it was completed on and enter who it was completed by
- Click Save



Decline Brochure

It is possible that a prospective resident may decline a brochure, if this is the case you can select that in the task list. Any Provide Brochure tasks will be deleted once the Brochure has been declined. To decline a brochure, you must go into the Enquiry and decline this on the Brochure step.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Brochure step
- Click Add Entry
- Click Decline Brochure
- Click Decline to confirm they have declined the brochure

Add Visit

If a prospective resident has visited or is planning on visiting the care home this can be recorded in CoolCare4. If a visit is planned this is very useful for keeping track of all planned visits so you are aware of when the visit is planned in for.

Adding a visit at the New Enquiry Stage

- Navigate to Occupancy Management section on CoolCare4
- Click New Enquiry
- Fill out the form on the first page and click next
- Click either yes or no to whether there has been a visit
- **Yes:** A box will appear asking you to select a date when the visit occurred and you will need to tick who visited.
- **No:** You will be asked if a visit is planned, if you tick yes you will be asked to select when it is planned in for and who will be attending, if you select no you will be asked to give a reason why the visit isn't planned.

Please note: Depending on the reason given for a visit not being planned you can deactivate the enquiry at this stage.

Easy to Understand Graphical Interface

Mr Bruce Forsythe | Prospective Resident
Contact: Mr Bruce Forsythe | |
Funding: Perm from Resp
Permanency: Perm from Resp
Care Type:
View More
Status: Active
Enquiry Started: (0 days)

Enquiry Complete
Brochure Complete 01/11/2018
Visit Planned 13/11/2018
Assessment
Admission

Planned:	Completed:	Date	Assigned
13/11/2018	-	13/11/2018	Alan Seymour

Contact Log
Filter Export
Initial Enquiry added by Alan Seymour on 01/11/2018 at 13:53.
Automatically created Provide Brochure task was completed.
Visit event was created automatically.
Enquiry status changed to 'Active' by Alan Seymour on 01/11/2018 at 13:54

Click the edit pencil icon to change the relevant field initially entered in the enquiry

Completed steps will as a green tick if complete

Click on a previous entry to edit it



Decline Visit

Because it is possible that a prospective resident may change their mind about visiting the home after a visit has been booked in you can decline the visit in the Enquiry after a visit has been scheduled in.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Visit step
- Click Add Entry
- Click Decline Visit
- Click Decline to confirm they have declined the visit

Add Assessment

Because it is highly unlikely that when you enter an Enquiry into CoolCare4 you will have completed an assessment, you can enter this information at a later date by going into the Enquiry.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Assessment step
- If an assessment has been booked in click on the booked Assessment
- If no assessment was booked Click Add Entry and then Click Assessment
- Fill out the details of the Assessment
- Click Save

Please Note: If you select that you cannot meet the resident's needs you will be asked to give a reason and when you save it will deactivate the enquiry.

Decline Assessment

If a prospective resident has declined an assessment then you cannot realistically know if you can meet their needs so if you select that a prospective resident has declined an assessment then it will deactivate the enquiry. This is the same when entering the Enquiry initially or if you update the enquiry at a later date.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Assessment step
- Click Add Entry
- Click Decline Assessment
- Click Deactivate

Plan for Admission

When a prospective resident has been accepted for admission you can put into place a task to plan for their admission in CoolCare4 if you want to.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Admission tab
- Click Add Entry
- Click Task



- In the task click on the “Task” dropdown box and select “Prepare for Admission”
- Fill out any other relevant fields
- When finished Click Save

Add Admission

Once the prospective resident has been admitted you can admit them on CoolCare4 and create a Resident record using all the information gathered in the Enquiry stage. This saves you from having to re-enter information into the system once they have been admitted.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click on the Admission tab
- Click Add Entry
- Click Admission
- Fill out all the details in the form
- Click Save & Admit

Enquiry Status

In the top right corner of the Enquiry is a status box which tells you what the next task is and when it is due, as well as the status of the Enquiry. If this box is red then it means there is an overdue task or there are no future tasks planned for the enquiry.

Contact Log

In the enquiry record every entry that is made on the record is recorded on the Contact Log, this also tracks what time and date and what user was the one who entered the information.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- The Contact Log is on the right-hand side of the Enquiry record

Filtering Contact Log

Because the Contact Log contains every entry made on the Enquiry there is an ability to filter the Contact Log by the type of activity, what stage it relates to and the date the entry was created.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click the Filter button at the top of the Contact Log
- Select the filtering you wish to set
- Click Apply

Please Note: To remove all filters click Reset



Mr Alan Seymour | Prospective Resident
Contact: Mr Alan Seymour | 077736592
Enquiry Reference: 11

Next Task: NONE
Date Due: NONE
Overdue Tasks: 0
Status: Waiting List Assessed
Enquiry Started: 16/08/2018 (77 days)

Activity Type: - any -
Milestone: - any -
Created - Start Date:
Created - End Date:
Reset Apply

Initial Enquiry added by Alan Seymour on 16/08/2018 at 15:49
Automatically created Provide Brochure task was completed.
Visit event was created automatically.
Enquiry status changed to 'Active' by Alan Seymour on 16/08/2018 at 15:58
Visit edited by Alan Seymour on 16/08/2018 at 15:59. Visit planned for 16/08/2018.
Visit event completed.
Assessment added by Alan Seymour on 16/08/2018 at 16:01. Assessment

Exporting Contact Log

The Contact Log can also be exported out of CoolCare4 as a CSV file should you need it to be.

- Navigate to the Occupancy Management section on CoolCare4
- Filter and find the enquiry
- Click the Export button
- The CSV Export will automatically download
- Click the downloaded file to open it

Mr Alan Seymour | Prospective Resident
Contact: Mr Alan Seymour | 077736592
Enquiry Reference: 11

Next Task: NONE
Date Due: NONE
Overdue Tasks: 0
Status: Waiting List Assessed
Enquiry Started: 16/08/2018 (77 days)

Initial Enquiry added by Alan Seymour on 16/08/2018 at 15:49
Automatically created Provide Brochure task was completed.
Visit event was created automatically.