



Resident Details

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Residents

The Residents section on CoolCare4 is denoted by its green colour. This is where all resident records are stored in CoolCare4 and the location of where you manage the resident records.

Navigating to Resident Records

- Log into CoolCare4
- Expand the Residents section by clicking on Residents
- Click Resident Records

Room	Full Name	NHS	Invoice Unique Ref	Admission Date	Discharge Date	Funding Type	Weekly Fee	Absence (days)
Rose B	Joan Richards		8734-0524-4003	12/09/2009		Private	£1,000.00	
Primrose 1	Janet Ellis		8883-3043-0830	24/09/2009		LA + TopUp	£703.56	41
Zinnia A	Gena Wilson	09000123	2446-5681-9856	17/09/2009		LA + TopUp	£650.00	
Camellia B	Jim Hooper	02345464	8313-6102-0455	20/10/2010		LA	£650.00	
Dahlia A	Andria Richardson			01/12/2011		LA	£650.00	
Ren B	Steve Thomas			15/12/2013		LA	£650.00	
Petunia B	Lucy Watkins		456	30/01/2015		Private	£700.00	

Admissions

Admitting Residents

On CoolCare4 you can admit residents from an enquiry or by creating a Resident Record from scratch.

To insert a resident straight into the system, without using an enquiry, you will need to be in the list of Resident Records.

To insert a resident record, follow the steps below.

- Navigate to the Resident Records
- Click Insert

2. Select insert to add a new resident record.

1, Select Residents, Resident Records and Insert to add a new resident record.



- Fill out all **required** fields on the first page
 - Title
 - Forename
 - Surname
 - Sex
 - Room No.
 - Permanency Type
 - Funding Type
 - Care Type
- Fill out any optional fields to suit your organisation
- Click Next

coolcare

Dashboard
Care Home
Staff
Residents
Resident Records
Accounts
Invoicing
Invoices
Reports

New Resident

GENERAL / ADMISSION DETAILS

Resident Details

Title Required: Miss
Forename Required: Tricia
Surname Required: Shaw
Known As:
Date of Birth: 05/01/1925 Age: 93
Marital Status Required: Widowed/Surviving Civil Partner
Sex Required: Female
Gender:
Orientation:

Residency Details

Room No / Bed Required: Zoo Room
Permanency Type Required: Permanent
Funding Type Required: Desired
Care Type Required: Dementia Early
Nursing Band: High
Dependency Level: 1 - Low Risk
Resident Number:
Weekly Fee: £ 750

Other Details

Religion: Nationality:
National Insurance: NHB Number:
Past Occupation:

Cancel Next

All required fields must be completed (shown as "Required" next to label).
Use any other optional fields to suit your organisation (shown as a label only).
Click "Next" to navigate to admission details screen.



- Fill out all required fields on the second page
- Click Save

By inserting a resident using this method you will be able to associate the resident to their old record, for example, you may do this if they are a resident who comes in and out of the care home on respite. For more information on associating resident records please refer to the Previous Admissions section of this guide.

To admit a resident from an enquiry, please see the Enquiries section on the Occupancy guide.

Admission Details

If you did not have the full details of the admission at the time you admitted a resident, you can go back into their record and add those details at a later date.

To add admission details at a later stage:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- Click on the Admission and Discharge drop down



- Click Admission
- Update the details and click Save

Joan Richards

Admission date: 12/09/2009
Weekly Fee: £1000.00
Home: Oak House

Charge Photo

Select the admission sub menu from the Admission and Discharge menu. Update details and select Save.

General Admission & Discharge Billing Contacts Documents Room History Absences

Admission

Admission Details

Admission Date
12/09/2009

Admitted From
Home

Home Details

Address Search Enter the Postcode

Address 1
30 Manor Road

Address 2

Returned Forms

Resident Details

Resident Photo

You have the ability to upload a photo onto resident records, which gives your record a more personal touch. It is especially useful for any staff who have not met the resident and may be viewing the record before going to visit them so they can easily identify them.

The resident photo will be in view on every page on the resident record you navigate through.

To add a resident photo:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- Click Upload Photo on the top left of the record next to the resident's name
- Navigate to the location of the photo and select it
- Click Open
- The photo will upload and be assigned to the Resident Record

Doris Freeman

Admission date: 27/06/2018
Weekly Fee: £900.00
Home: Gilbert House

Upload Photo

Click on Upload Photo link. Navigate to where the photo is stored. Select the resident photo, click open and the photo will load.

General Admission & Discharge Billing Contacts

General

Resident Details

Title Required
Mr

Forename Required
Doris

Residency Details

Room No: Room 15 Bed: 1 [Change Room](#)

Permanency Type Required
Permanent



Resident Details

The Resident Details section of their Resident Record is in the General tab of the Resident file. These details are the personal details of the Resident such as their name, date of birth, marital status etc.

When you are ready to add details to your resident's record:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- It will open on the General Tab
- The Resident Details are on the left-hand side

Residency Details

The Residency Details section of the Resident Record is in the General tab of the Resident file. These details are the records of their residency which includes what their current room is and whether they are permanent or respite.

This is also where you can give the Resident a unique reference number to identify them without using their name when invoicing.

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- It will open on the General Tab
- The Residency Details are on the right-hand side

Handy Hint: A Unique Reference Number (URN) can be automatically generated when adding Fee Contracts in Billing (see invoicing guide)

Changing Rooms

If a resident's changes their room, during a stay in your care home, this should be recorded and kept up to date in CoolCare4. If this is not kept up to date then you will find that Occupancy Reports and Resident Reports are incorrect as well as home analysis. It is very important to keep accurate records of Residents on CoolCare4.

To quickly and easily change a resident's room:

- Navigate to the resident record you are moving
- Under the Residency Details section of the General tab click Change Room
- Select whether you are moving the resident into an empty room or swapping them with a current resident
- Select which empty room you are moving them into or select the resident you are swapping them with
- Change the date to the date they moved, you cannot set the date to a date in the future
- Click Move into Room or Swap Rooms to complete the move/ swap



Change Room

Swap Room with Current Resident

Move into Empty Room

Room Number	Bed	Status
Room 7	1	Active
Room 8	1	Active
Room 13	1	Active
Kings Suite	A	Active

Occurred On:

Selected Room:

To swap a room: select Change Room and then select the Swap Room with Current Resident option. Select the resident you wish to swap with add date of change in the Occurred On text box. Then click Swap Rooms to save changes

To move into an empty room select: Move into an empty room option, select the empty room from list. Add an Occurred On date and click Move into Room

Handy Hint: Change rooms allows you to swap rooms with an existing resident. as well as move a resident to an empty room.

Other Details

On the General tab of the resident's record there is a section at the bottom called Other Details. These are details that are not necessarily personal details but are details which may be of use to the care home. Details such as the resident's previous occupation and their religion can be stored here.

To view or add other details to a resident's record:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- The Other Details section is at the bottom of the General tab

Room History

The Room History tab allows you to view the records of every room a resident has been in during their stay in your care home - as long as your records on CoolCare4 have been kept up to date.

To view a resident's room history:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- Click on the Room History tab on the top bar



Select Room History to open the room history for the selected resident

Alan Hardacre
Admission date: 27/06/2018
Weekly Fee: £750.00
Home: Gilbert House
Dependency level: 1 - Low Risk
Care type: Dementia Care

General Admission & Discharge Billing Contacts Documents **Room History** Absences

Room History

Room	Bed	Date In	Date Out
Room 1	1	27/06/2018	16/10/2018
Room 3	1	17/10/2018	

← Back

Previous Admissions

If you have any residents who have been admitted to your care home previously, and they return at a later date, you can associate their previous records to their new one.

In the new resident record you can view all the previous records by going into the Previous Admissions section of their resident record. When you associate resident records, you can also reuse their account details from their previous admission.

To view a resident's previous admission:

- Navigate to the Resident Records
- Find the resident in the records list or by using the search bar
- Click on the record to open it
- Click on the Admission & Discharge drop down on the top bar
- Click Previous Admissions

Select the Previous Admissions sub menu from the Admission and Discharge menu. This allows you to view any previous admissions associated with the resident.

Marcus Fox
Admission date: 11/07/2018
Weekly Fee: £900.00
Home: Gilbert House

General Admission & Discharge Billing Contacts Documents Room History Absences

Previous Admissions

Admission Period	Duration	Discharge Reason	Permanency
06/06/2014 - 04/07/2018	1490 days	Notice Given By Resident	Permanent

Contacts

Managing Resident Contacts

In CoolCare4 you can insert as many contacts onto a resident record as necessary. In addition to the standard types of contacts, such as their Next of Kin and Family, you can also specify other types of contacts such as their Doctor, Social Worker or another Professional.

- Navigate to the Resident's record
- Click on the Contacts tab on the top bar



- To insert a new contact click Insert
- Make sure that all required fields are filled in and click Save

Handy Hint: If the contact doesn't fit the list of contacts available you can always the Other Contact option as well.

Resident Contacts Report

There is a report that will export all the contact information for all residents on CoolCare4 into a CSV file. This is particularly helpful if you require it for sending bulk communications out to all the resident contacts.

To run this report follow the navigational steps below:

- Expand the Resident section by clicking Resident on the left-hand side of the screen
- Click Reports
- Click Resident Contacts, this report is in the Resident Details section of the reports

The screenshot shows the CoolCare4 interface. On the left is a navigation menu with 'Resident Reports' highlighted. The main area is titled 'Residents Reports' and contains several report buttons. The 'Resident Contacts' button is circled in red. Two callout boxes are present: one pointing to 'Reports' in the menu with the text '1. Click Resident and Reports', and another pointing to the 'Resident Contacts' button with the text '2. Click Resident Contacts to run the report'.

Documents

The Documents Section is where you can enter any general notes and upload any documents to the Resident file.

Uploading Documents

- Navigate to the Resident Record
- Click on the Documents drop down
- Click the Documents button
- Click Insert
- Enter a name and date for the document and click Choose File
- Navigate to the location of the document and click on it
- Click Open
- Click Upload

Downloading Documents

- Navigate to the Resident Record
- Click on the Documents drop down
- Click the Documents button



- Tick the box for the document you wish to download
- Click Download

Handy Hint: If you cannot see the downloaded document press **Ctrl** and **J** to bring up downloads list

General Notes

Here you can enter any notations needed on the resident record. There is a character limit of 2000 characters for this section, if you want to enter any information that has a large amount of words, we recommend you save it as a Word document and upload it as a document.

See Uploading Documents for instructions on how to do this.

Absences

Managing Absences

If a resident has any kind of absence from the home without them being discharged this can be recorded on CoolCare4 and it can be flagged that they are absent so staff members are aware of this.

To mark a resident as absent:

- Expand the Residents section
- Click Resident Records
- Select the Resident's record you are adding the absence to and open their record
- Click Absences
- To create a new absence click Insert
- Fill in all the required fields and any other information you have on the absence
- Click Save
- To amend an existing absence, click on the absence record
- Add any extra information required, such as the Date In
- Click Save

Handy Hint: If a resident is absent this is referenced in their Resident Record header. Whilst the resident is absent, their invoicing will automatically be updated, based on the billing contract terms you have selected for each of their fee contracts.

Absent Residents Widget

There is a Dashboard Widget that shows you any absent residents. In order to view this widget, you must have it selected in your user account.

Once you have access to the Absent Residents widget please follow the below to use it.

- Click on the Dashboard
- If the Widget has been enabled for your user account it will show on this screen
- To open the absent resident's record simply click their name on the widget



Handy Hint: If you are not a Full Access user, please contact a Full Access user to request this widget to be enabled for you. If you are a Full Access user please see the Getting Set Up guide for more information on setting up dashboard widgets.

Resident Absence Report

In addition to the Widget, there is also a report that can be run to bring back details of resident absences. The report brings through full details of any absences within a date range including residents who have returned to the home. It also pulls through the reason and any notes that were added to the Absence.

Notice of Discharge and Discharging Residents

When a Resident gives notice to discharge or is discharged from the care home you will need to add notice details and/or discharge them from the home on CoolCare4.

Notice of Discharge

If a resident gives notice of discharge, you can insert the date they gave notice and what their potential discharge date is.

- Expand the Residents section
- Click Resident Records
- Select the Resident's record you wish to add the potential discharge date
- Click on record to open it
- Click Admission and Discharge
- Click Discharge
- Add Notice Given Date and Potential Discharge Date
- Save

The screenshot shows the CoolCare4 interface for a resident named Eric Morecambe. The 'Admission & Discharge' tab is active, displaying the 'Discharge Planning' section. The 'Notice Given Date' is set to 09/10/2018 and the 'Potential Discharge Date' is set to 09/11/2018. A 'Save' button is visible next to the date fields. A callout box with a white background and black border points to the 'Save' button, containing the text: 'Add a Notice Given Date, Potential Discharge Date and Select Save'. The resident's details include: Admission date: 25/09/2018, Weekly Fee: £0.00, Home: Oak House, Dependency level: 1 - Low Risk, and Care type: Nursing. The left sidebar shows navigation options like Dashboard, Care Home, Staff, Residents, Resident Records, Accounts, Invoicing, Invoices, and Reports.

Handy Hint: This will flag up in occupancy that you have a potential discharge and you can then look in your enquiry waiting list to identify a resident to move in and manage their admission tasks.



Discharge a Resident

You discharge a resident either with or without notice by the same method.

- Expand the Residents section
- Click Resident Records
- Find the record for the resident you wish to discharge by either using the search bar or going through the list
- Click on the record to open it
- Click on the Admission & Discharge drop down on the top bar
- Click Discharge
- To discharge the resident, click the Discharge Resident button
- Add the date of discharge must be either today or in the past
- Select the Reason (Cannot Meet Needs, Immediate Discharge – No Notice Given, Notice Given By Home, Notice Given by Resident, Death)
- Complete remaining fields (fields available will vary depending on reason chosen)
- Click Complete Discharge

Resident Records

- Accounts
- Invoicing**
- Invoices
- Reports

Discharge Planning

Notice Given Date: 09/10/2018 Potential Discharge Date: 09/11/2018 [Save](#)

Discharge Details

Date of Discharge
07/11/2018

Reason for Discharge
Notice Given By Resident

Forwarding Address
Address Search SR5 3EL [p](#)

21 Grange Road, Sunderland, Tyne and Wear

Line 1
21 Grange Road

Line 2
Sunderland

Line 3

Line 4
Tyne and Wear

Postcode
SR5 3EL

[← Back](#) [Complete Discharge](#)

Final date of funding will be 07/11/2018

Final date of funding will be displayed and relevant fee contracts will end automatically for invoicing

Add date of discharge and reason
All reasons other than death will only require a forwarding address



Discharge Planning

Notice Given Date: 09/10/2018 Potential Discharge Date: 09/11/2018

Final date of funding will be 07/11/2018

Discharge Details

Date of Discharge: 07/11/2018

Reason for Discharge: Death

Death Details

Cause of Death

Notes Concerning Death

Forwarding Address

Address Search: SR5 3EL

21 Grange Road, Sunderland, Tyne and Wear

Line 1: 21 Grange Road

Line 2: Sunderland

DOLS Authorisation in Place: No

CCG Notification Sent

Time of Death: HHMM

Name of Doctor

If death is selected as discharge reason as well as discharge and address details, death details and DOLS information is also required

Once a resident has been discharged, they will go into the Discharged Residents list on the Resident Records page. This can be accessed by clicking on the dropdown box at the top of the screen and selecting Discharged.

Handy Hint: The Reasons for Discharge field takes options from a Lookup which can be tailored by your company. The options are inserted in the Lookups so please see the Getting Set Up guide for more information about how to tailor the system.

Reporting

There are several reports that can be run that will bring back information on the Residents, these reports are all in the Resident Reports section on CoolCare4. Please follow the below instructions to access the Resident Reports.

- Expand the Residents section
- Click Reports

Resident Reports

Full Resident Details

Resident Contacts

Resident Missing Information

Fire List

Fee Discrepancies

Missing Contracts

Residents by Funding

Invoice Analysis

Show Descriptions

Select residents and click reports link
Select a report to run

Use description link to view a description for each report



Handy Hint: Use the show descriptions button to display a detailed description for each report.

Full Resident Details

The Full Resident Details report does exactly what it says on the tin. It prints off a full and detailed list of residents who were in the home within the specified Date Range.

This report is printed off as a CSV file. Because this is a CSV file you are able to delete and remove any columns of data you do not require to make the analysis easier.

To run the report, follow the above navigational steps and click on Full Resident Details and select the date range you are running the report for.

Resident Contacts

If you require a full list of all Contacts that are attached to Resident Records you can run off the Resident Contacts report. This will create a CSV file with a list of all the contacts on all current residents' records as well as which resident record they are attached to.

To run the report, follow the above navigational steps to get to the reports and click Resident Contacts.

Resident Missing Information

To check if any resident records are missing vital information there is the Resident Missing Information report which when run off will produce a list of all resident records that are missing details on their records and tell you what information is missing.

To run this report, follow the above navigational steps to get to the reports and click Resident Missing Information. This report will open as a new tab on your Internet Browser as opposed to a CSV file.

Fire List

On CoolCare4 there is a report that can be run off to give an accurate head count of residents if for whatever reason you have to evacuate the home. This will print off a list of all Residents who are currently in the home and in a separate section of the report list all residents who are absent. However, this will only be accurate providing resident absences are recorded accurately in CoolCare4.

To run this report, follow the above navigational steps to get to the reports and click Fire List.

In Home Between Dates

This report is run off to display what residents were active residents within the specified date range, it does not include any details about their absences however it does display their admission and, if applicable, their discharge date.

To run the report, follow the above navigational steps to get to the reports and click In Home Between Dates, select the date range and click Produce Report. The report will be created as a CSV file.

Resident Absences

In order to monitor the Resident Absences, you can run a report that will detail any absences within a date range. The report will give you a list of all residents who have been absent within



your specified date range, the reason for the absence and the date they returned to the care home if they have returned.

To run the report, follow the above navigational steps to get to the reports and click the Resident Absences button. Enter the date range and click Produce Report, this will print off a CSV file with all the details on it.

Resident Discharges

To get a good idea of how many residents have been discharged within a certain date range, and the reasons for their discharges, there is a report that can be run that will present you with all this information.

To run the report, follow the above navigational steps to get to the reports and click the Resident Discharges button. Enter the date range and click Produce Report, this will print off a CSV file with all the details of the discharges printed on it.

Handy Hint: When you print off the reports that display as a CSV file these are downloaded. If you cannot find the report when you have clicked to print it, press Ctrl and J on your keyboard. This will open the downloads list and if the report has downloaded correctly it will be displaying at the top of this list.