

custom reports in CoolCare.

In addition to the reports that are part of CoolCare by default, Custom Reports can be created to aid with reporting and data gathering. Reports can be created for both staff and residents. This guide can be used to help with creation and editing of these reports.

creating a custom report.

The Custom Reports section is located within the top-right hand menu, where your name is displayed. You will need permission to access the Custom Reports setup, permissions are managed by your CoolCare system Administrator. To find the custom reports page:

- Select your name in the top right of CoolCare
- Select **Custom Reports** from the menu

Name	Position	Date Time	Hours (HH:MM)
Sarah Olson	Care Assistant	29/05/2025 06:55	30:41
Julia Strong	Care Assistant	29/05/2025 06:50	30:46
Amelia Watson	Senior Carer	29/05/2025 06:45	30:51

Name	Position	Start Date
Amelia Watson	Senior Carer	25/08/2025

Name	Start Date	DBS Status	DBS Expiry	PIN Expiry
Amelia Watson	01/10/2021		01/06/2025	
Courtney Wh...	01/11/2020		20/06/2025	
Sarah Munro	04/09/2024		20/06/2025	

Name	Position	Start Date
Jade Heath	Care Assistant	09/05/2025
Leah Spence	Care Assistant	06/05/2025

This will open your custom reports list. To create a custom report:

- Click **+Insert**
- Enter the title of the report
- Select the report type either *Staff* or *Resident*, this will determine what information is available to report upon

New Custom Report

Title: Test Report

Homes Available In: All Homes

Report Type: Staff

Include: -

Columns: Add Column

No columns have been added.

Buttons: Back, Save, Preview

- Choose the Homes that you would like this report to be available in, defaults to 'All Homes'
- Click **Edit** to change the Homes that you would like this report to be limited to
- Uncheck the Homes that you do not want to have this report available for
- Click **Select**
- From the **Include** column, it is possible to include further information from the Contact section of either Staff or Resident records

Please note: A report that includes this extra information can only be exported as .pdf file, not an .xls report.

- Click the **Add Column** button to select data that you would like to display in the report. The order they appear in the setup, will determine the order that the report is displayed

- Type in the field *Search for a field* to locate information, for example **Full Name**. This will display the Full Name of the Staff Member.
- If you don't know the name of the field you're looking for, type in a keyword, for example *Home*. All associated fields available with the word *Home* will be shown in the display.

- Once you have located the appropriate field, click to select it. The field information will now be displayed in the columns list

sorting the report.

Once you have added all the required columns, choose the **Sort** option for your report.

- From the drop-down list, choose the field on which you require to sort the data. This is a list of the columns you have added to the report
- Choose **asc** (ascending) or **desc** (descending) order

filter the report.

The **Filter** option allows you to filter out information from the report based on pre-set criteria such as filtering by departments for staff members or recent discharges on residents.

Consider the use of a filter to help tailor the information results.

example report.

Report for Nurse PIN expiry

- From Custom Reports, insert a new report called *Nurse PIN Expiry All Homes*
- Choose type *Staff*
- Select *Homes available In* – choose All Homes
- Click on *Add Column*
- Add columns for *Full Name, Home Name, Current Effective Default Position, Registered Professional PIN expiry*
- Sort by *Current Effective Default Position*
- Select filter of *PIN due soon*

You will now have a report that will identify Nurses (with PIN registration) who's PIN number is set to expire within 14 days.

Title **Homes Available In** [Edit](#)

Nurse PIN Expiry All Homes All Homes

Report Type: Staff

Include ⓘ

-

Columns ⓘ [Add Column](#) **Sort Records by**

Drag columns to define the order they appear from top/left - bottom/right

Currently Effective Default Position asc

Filter Options

Pin Due Soon

Full Name ×

Home Name ×

Currently Effective Default Position Name ×

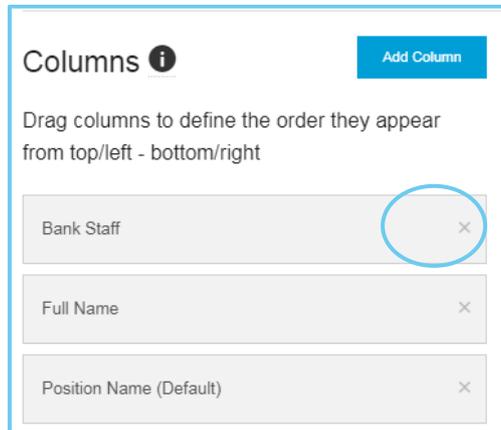
Registered Professional Pin Expiry ×

Please note: You can use the Preview Button to create a real time preview of what the report will produce

editing a custom report.

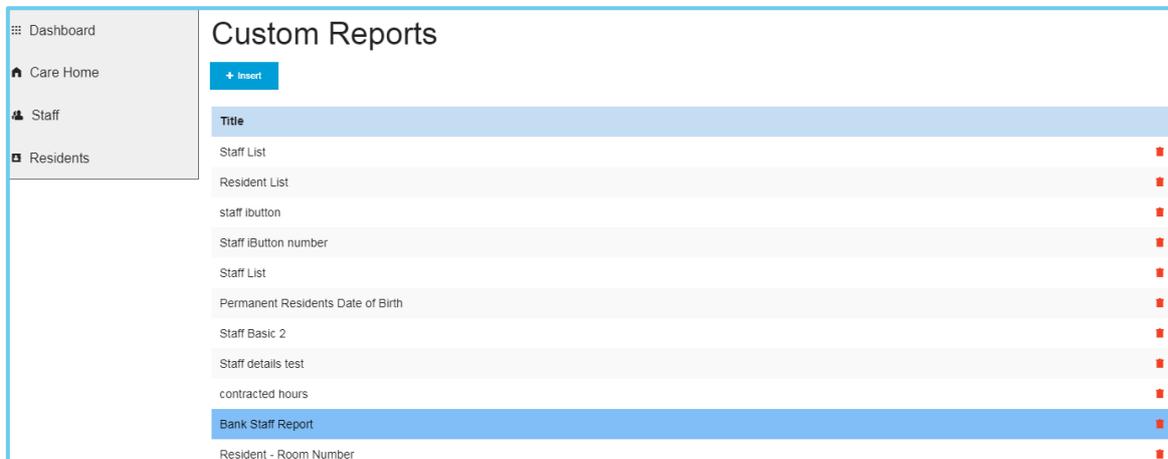
Once you have saved the report, you may wish to change the detail of the report.

- From Custom Reports, locate your report in the list.
- Click to select and open the report
- Click **Add Column** (as described above) to insert a new column
- Click the **X** button to remove a column from the report.
- Click **Save** to apply and save your changes

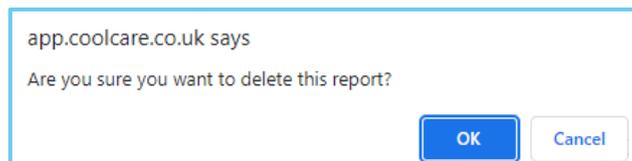


deleting a report.

It is good housekeeping to remove unwanted reports from the system, it removes confusion if the report has been superseded by another report and reduces the number of reports in the list making it easier to navigate. To delete a report from Custom Reports, click the red dustbin icon from the display



Select OK to delete, or cancel if you do not wish to delete it.



accessing custom reports.

Now you have created and finalised your report, it will be available to view for other users to run.

Reminder, the Homes that have access to the report is determined by the setup.

Dependent on whether your report is based on Staff information or Resident information, it will appear in the respective report section of CoolCare.

- From the left-hand menu, choose **Staff** or **Residents**
- Select **Reports**
- Custom Reports created for this home will be displayed at the bottom of the reports list
- Here you can choose to run the report and have the information displayed in PDF format or export to Excel where you can model the data if required

Staff Reports Show Descriptions

Staff Details

Full Staff Details	Staff Contact Details	Staff Missing Information
Appraisal & Supervised Sessions	Covid Vaccination Status	

Absence and Holiday Reports

Staff Absence	Holiday Details	Holiday Accrual
---------------	-----------------	-----------------

Training Reports

Training Matrix	Training Exception Report	Achieved Training
-----------------	---------------------------	-------------------

Staff Hours and Timesheet Reports

Bank Staff Hours	In Home Between Dates	Budget Vs Planned
Budget Vs Timesheet	Planned Vs Timesheet	Timesheet Totals
Vacancy Tracker	Staff Pool Hours	Staff Hours Analysis
Rota Pattern Assignment Gaps		

Custom Reports

DBS Expiry (Carers)		Next Appraisals (Care)		Next Supervision Dates	
PDF	XLS	PDF	XLS	PDF	XLS