

Coolcare custom reports

Custom Reports Introduction

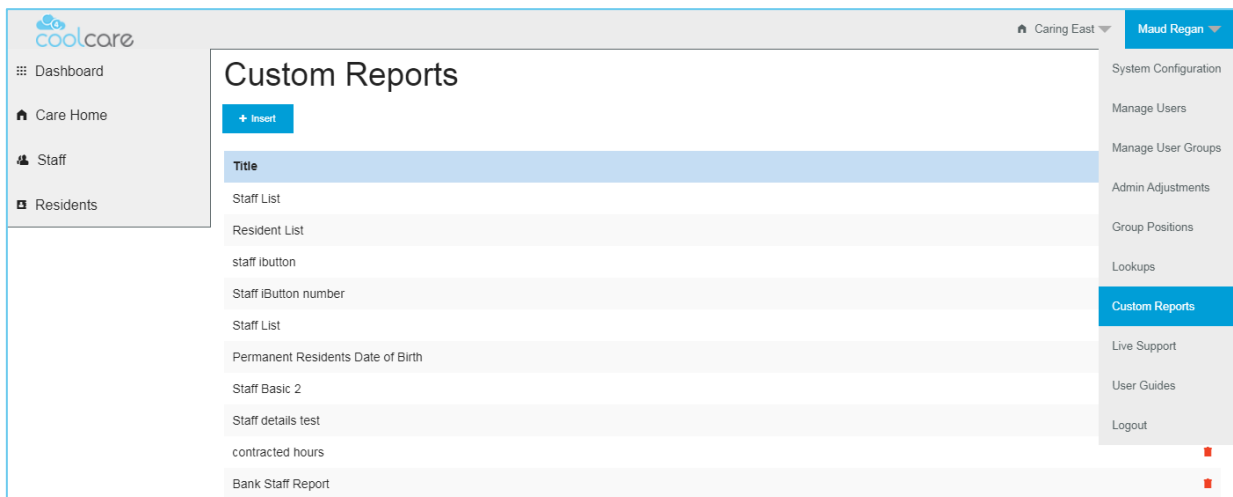
In addition to the reports that are part of CoolCare by default, Custom Reports can be created to aid with reporting and data gathering. Reports can be created for both staff and residents. This guide can be used to help with creation and editing of these reports.

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.

Navigation to Custom Reports

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



Creating the Report

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.

- 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: it may not be possible to export such reports.**
- 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.

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

Add/Deleting Columns

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

Columns
Add Column

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

Bank Staff	×
Full Name	×
Position Name (Default)	×

Delete a Report












It is good house-keeping 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

Dashboard
Care Home
Staff
Residents

Custom Reports

+ Insert

Title	
Staff List	
Resident List	
staff ibutton	
Staff iButton number	
Staff List	
Permanent Residents Date of Birth	
Staff Basic 2	
Staff details test	
contracted hours	
Bank Staff Report	
Resident - Room Number	

Click OK to delete or cancel if you do not wish to delete it

app.coolcare.co.uk says
Are you sure you want to delete this report?

OK
Cancel

Accessing 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**
- Select **Reports**
- Custom Reports created for this Home based on Staff information will be displayed here
- 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

The screenshot shows the 'Staff Reports' interface. The left-hand menu has 'Reports' selected. The main area is divided into several sections:

- Staff Details:** Includes buttons for 'Full Staff Details', 'Staff Contact Details', and 'Staff Missing Information'.
- Absence and Holiday Reports:** Includes buttons for 'Staff Absence' and 'Holiday Details'.
- Training Reports:** Includes buttons for 'Training Matrix', 'Training Exception Report', and 'Achieved Training'.
- Staff Hours and Timesheet Reports:** Includes buttons for 'Bank Staff Hours', 'In Home Between Dates', 'Budget Vs Planned', 'Budget Vs Timesheet', 'Planned Vs Timesheet', 'Timesheet Totals', 'Vacancy Tracker', and 'Staff Pool Hours'.
- Custom Reports:** Includes buttons for 'Bank Staff Report', 'Bank Staff test', 'Birthdays', 'contracted hours', 'Contracted Hours', and 'Contracted Hours - Leavers'. Each of these has 'PDF' and 'XLS' options.

- From the left-hand menu, choose **Residents**
- Click **Reports**
- Custom Reports created for this Home based on Resident information will be displayed here
- 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

The screenshot shows the 'Residents Reports' interface. The left-hand menu has 'Reports' selected. The main area is divided into several sections:

- Resident Details:** Includes buttons for 'Full Resident Details', 'Resident Contacts', 'Resident Ledger', and 'Resident Missing Information'.
- Fee and Contract Reports:** Includes buttons for 'Fee Discrepancies', 'Missing Contracts', 'Residents by Funding', and 'Invoice Analysis'.
- Absence and Discharge Reports:** Includes buttons for 'In Home Between Dates', 'Resident Absences', and 'Resident Discharges'.
- Custom Reports:** Includes buttons for 'nok', 'Permanent Residents Date of Birth', 'Resident - By Room/Fee', 'Resident - Room Number', 'Resident List', and 'Resident Room List Test'. Each of these has 'PDF' and 'XLS' options.