

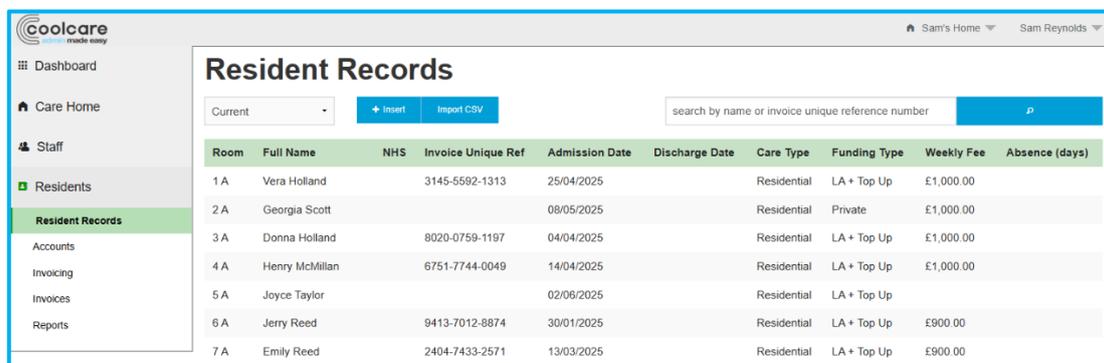
adding new residents to CoolCare.

The Residents section on CoolCare is where all resident records are stored, and the location of where you manage the resident records. Once you've added a new resident, you'll be able to navigate through their general information, documents, room history, and other details. This guide will show you how to manually add a resident record on to CoolCare, for more information on admissions, contacts etc; please use the specific guides.

On CoolCare you can admit residents from an enquiry or by creating a resident record from scratch. This guide will look at the latter, adding residents manually. You can also import your residents via csv upload, please check our guide *Uploading Staff and Resident CSVs to CoolCare* for more information on the upload process.

To insert a new resident record onto CoolCare:

- Navigate to Residents – Resident Records
- Click the **+Insert** button at the top of the resident list



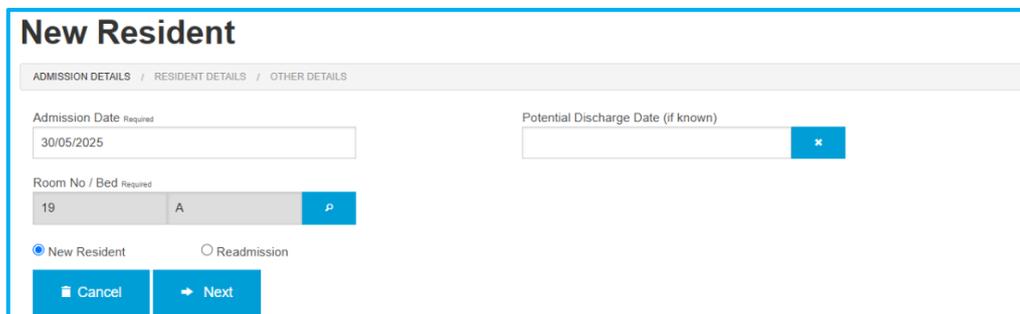
Room	Full Name	NHS	Invoice Unique Ref	Admission Date	Discharge Date	Care Type	Funding Type	Weekly Fee	Absence (days)
1 A	Vera Holland		3145-5592-1313	25/04/2025		Residential	LA + Top Up	£1,000.00	
2 A	Georgia Scott			08/05/2025		Residential	Private	£1,000.00	
3 A	Donna Holland	8020-0759-1197		04/04/2025		Residential	LA + Top Up	£1,000.00	
4 A	Henry McMillan	6751-7744-0049		14/04/2025		Residential	LA + Top Up	£1,000.00	
5 A	Joyce Taylor			02/06/2025		Residential	LA + Top Up		
6 A	Jerry Reed	9413-7012-8874		30/01/2025		Residential	LA + Top Up	£900.00	
7 A	Emily Reed	2404-7433-2571		13/03/2025		Residential	LA + Top Up	£900.00	

admission details.

This will open the **New Resident** page. Fill out the details required:

- Admission Date
- Potential Discharge Date (if known) – this field is optional
- Room No/Bed – click the search icon to choose from your list of empty rooms
- New Resident/Readmission – choose whether the resident record is for a brand new resident, or a readmission that has a previously discharged resident record in CoolCare

Please note: If the resident is a readmission, you can search for their previous record and link them together, allowing you to reuse the information already in the system for this resident record.



Once these details are filled in, click **Next** to go to the next step.

resident details.

The next page is where you can fill in the details of the new resident record.

Please note: if you have added the resident as a readmission, some details may already be filled in.

The fields that are required to create the record are:

- Title
- Forename
- Surname
- Marital Status
- Sex
- Permanency Type
- Funding Type
- Care Type

All other fields are optional at this stage, such as address and contact details.

New Resident

ADMISSION DETAILS ✓ / RESIDENT DETAILS / OTHER DETAILS

Title <small>Required</small>	Mr	Marital Status <small>Required</small>	Widowed/Surviving Civil Partner		
Forename <small>Required</small>	Edward	SEX <small>Required</small>	Male		
Surname <small>Required</small>	Kirk	Permanency Type <small>Required</small>	Permanent		
Known As		Funding Type <small>Required</small>	LA + Top Up		
NHS Number		Care Type <small>Required</small>	Residential		
Date of Birth		Age		Nursing Band	High
Resident's Email Address		Dependency Level	1 - Low Risk		

Please note: Permanency Type, Funding Type and Care Type are all fields that can be customised through your Lookups section in CoolCare. For more information, please check our guide *Adding and Amending Lookups*.

Once you have filled out the required details, click **Next** to go to the next step.

other details.

The third page is where you can fill in any other details you know about the new resident at this stage. All fields on this page are optional, so can be skipped for now and filled in later. Details on this page includes the resident's weekly fee, returned forms and contracts, additional personal details and a home address.

New Resident

ADMISSION DETAILS ✓ / RESIDENT DETAILS ✓ / OTHER DETAILS

Resident Number	<input type="text"/>
Weekly Fee	<input type="text" value="£ 1000"/>
Terms of Residency Date	Contract Returned Date
<input type="text" value="30/05/2025"/>	<input type="text" value="30/05/2025"/>
TV Licence Expiry	Electrical Safety Form Date
<input type="text"/>	<input type="text"/>
Religion	Nationality
<input type="text"/>	<input type="text"/>
National Insurance	Past Occupation
<input type="text"/>	<input type="text"/>
Gender	Orientation
<input type="text"/>	<input type="text"/>
Admitted From	<input type="text"/>

Home Details

Address Search

Address 1

Address 2

Address 3

Address 4

Postcode

Home Telephone

Fill in the details you wish to add and then click **Save** to create the new resident record.

Once saved, the new resident will appear on your resident records list where you can access the record and update any details within. For more information on updating the resident, please see our other resident record guides.