

Adding New Residents to CoolCare

The Residents section on CoolCare is denoted by its green colour. This is where all resident records are stored in CoolCare 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, 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.

Resident Records

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 import a CSV list of residents but please check the CSV Upload Guide for information.

To admit a resident from an enquiry, please see the CoolCare Enquiries Guide.

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

The screenshot shows the CoolCare interface. On the left is a sidebar with a menu: Dashboard, Care Home, Staff, Residents, and Resident Records (highlighted in green). Below Resident Records are links for Accounts, Invoicing, Invoices, and Reports. The main area is titled 'Resident Records' and has a dropdown menu set to 'Current'. There are two buttons: '+ Insert' and 'Import CSV'. A callout box points to the '+ Insert' button with the text 'Select insert to add a new resident record'. Below the buttons is a table of residents. A callout box points to the 'Resident Records' link in the sidebar with the text 'Select Residents and Resident Records'.

Room	Full Name	NHS	Invoice Unique Ref	Admission Date	Discharge Date	Funding Type	Weekly Fee	Absence (days)
2 A	Trevor Brown		4382-5868-6803	24/05/2022		LA + Top Up	£1,000.00	
3 A	Kaye Black			01/04/2022		Private		
4 A	Irene Ilkley		1478-8801-2646	13/01/2022		LA + Top Up	£1,000.00	
5 A	Jane Little			07/04/2022		Private		
6 A	Margaret Fisher			16/03/2022		LA + Top Up	£1,500.00	
7 A	Maurice Moss		9721-6703-4881	04/11/2021		LA + Top Up	£1,000.00	
8 A	Joseph Shaw			01/01/2021		LA		
9 A	Geoffrey Royson			08/10/2021		LA + Top Up		
10 A	Peggy Hill			21/04/2022		LA + Top Up		
11 A	Charles Sung			01/12/2021		LA + Top Up		
12 A	John Marston			17/03/2022		LA + Top Up		
15 A	Jane Kavinsky			28/03/2022		LA + Top Up		
16 A	Martha Wayne			01/03/2022		LA + Top Up		
17 A	Iris Watson			29/09/2021		LA + Top Up		
18 A	Maria Hill			04/10/2021		Private		
19 A	Julia Smith			09/06/2022		Private	£900.00	
20 A	Roger Wilson			09/06/2022		LA + Top Up	£950.00	

- First you will need to add an admission date and room and bed number, you can also add a potential discharge date if known

The screenshot shows the 'New Resident' form in the Coolcare system. The 'ADMISSION DETAILS' tab is active. The form includes the following fields:

- Admission Date Required: 23/06/2022
- Potential Discharge Date (if known): [Empty field with a clear button]
- Room No / Bed Required: 21 A

At the bottom, there are two buttons: 'Cancel' and 'Next'.

- Fill out all **required** fields on the first page
 - Title
 - Forename
 - Surname
 - Marital Status
 - Sex
 - Permanency Type
 - Funding Type
 - Care Type
- Fill out any optional fields to suit your organisation
- Click Next

The screenshot shows the 'New Resident' form in the Coolcare system. The 'ADMISSION DETAILS' tab is active. The form includes the following fields:

- Title Required: Mr
- Forename Required: Sharpe
- Surname Required: Barry
- Known As: [Empty field]
- NHS Number: JH8767854
- Date of Birth: 07/06/1950
- Age: 72
- Marital Status Required: Separated
- Sex Required: Male
- Permanency Type Required: Permanent
- Funding Type Required: Private
- Care Type Required: Regular
- Nursing Band: High
- Dependency Level: 1 - Low Risk

At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'. Arrows indicate that clicking 'Next' will navigate to the 'ADMISSION DETAILS' screen.

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 relevant information on page 2
- Click Save

The screenshot shows the 'New Resident' form in the Coolcare system. The form is divided into several sections: 'ADMISSION DETAILS', 'RESIDENT DETAILS', and 'OTHER DETAILS'. The 'RESIDENT DETAILS' section includes fields for Resident Number, Weekly Fee, Terms of Residency Date, Contract Returned Date, TV Licence Expiry, Electrical Safety Form Date, Religion, Nationality, National Insurance, Past Occupation, Gender, Orientation, and Admitted From. The 'OTHER DETAILS' section includes a 'Home Details' section with an 'Address Search' field, a dropdown menu showing '15 Harbour Exchange Square, London', and fields for Address 1, Address 2, Address 3, Address 4, Postcode, and Home Telephone. A callout box with an arrow pointing to the 'Address Search' field contains the text: 'Use the post code search to populate address'. Another callout box with an arrow pointing to the 'Readmission' radio button contains the text: 'Select Readmission if resident has previously lived at the home and then search for old record'. A third callout box with an arrow pointing to the 'Save' button contains the text: 'Select Save to save the new record.' The form also has a 'Cancel' button and a 'Previous' button.

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 guide.

Adding a 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

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Sam's Home | Maurice Sharp

Dashboard | Care Home | Staff | Residents | **Resident Records** | Accounts | Invoicing | Invoices | Reports

Margaret Fisher

Admission Date: 16/03/2022
Weekly Fee: £1500.00
Home: Sam's Home

General | Admission & Discharge | Billing | Contacts | Documents

Resident Details

Title Required: Mrs
Forename Required: Margaret
Surname Required: Fisher
Known As:

Residency Details

Room No: 6 | Bed: A | [Change Room](#)

Permanency Type Required: Permanent
Funding Type Required: LA + Top Up
Care Type Required: Regular

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

Adding other important information

On CoolCare you can also add a resident's current Covid -19 status and their weekly fee. If you don't add weekly fees, you'll notice an orange ribbon alert at the top of their page.

To add a resident weekly fee and Covid -19 status:

- 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
- At the top of the page there will options to add weekly and update their Covid -19 status

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Moe's Home | Maurice Sharp

Dashboard | Care Home | Staff | Residents | **Resident Records** | Accounts | Invoicing | Invoices | Reports

Gerry Gibson

Admission Date: 05/07/2022
Weekly Fee: £0.00 [Edit](#)
Home: Moe's Home

Dependency Level: 1 - Low Risk
Care Type: Regular
Covid-19 status: - [Edit](#)

General | Admission & Discharge | Billing | Contacts | Documents | Rooms | Absences | Vaccination

Resident Details

Title Required: Mr
Forename Required: Gerry
Surname Required: Gibson
Known As:

Date of Birth: 06/07/1917 | Age: 105
Marital Status Required: Married

Residency Details

Room No: Room 4 | Bed: A

Permanency Type Required: Permanent
Funding Type Required: LA
Care Type Required: Regular
Nursing Band: Medium
Dependency Level: 1 - Low Risk

There are only two options to change on a resident's profile

Date	Version	Reviewed By	Comments
27/07/2022	V4.6.13	Maurice Sharp	Create draft document