

# Adding Resident Documents to CoolCare

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

## Documents (Uploading)

- 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

The screenshot shows the CoolCare web interface. On the left is a sidebar with navigation links: Dashboard, Care Home, Staff, Residents (highlighted), Resident Records, Accounts, Invoicing, Invoices, and Reports. The main area displays the profile for 'Sharpe Barry' with details like Admission Date (01/06/2022), Weekly Fee (£1000.00), Home (Moe's Home), Dependency Level (1 - Low Risk), Care Type (Regular), and Covid-19 status. Below this is a tabbed interface with 'Documents' selected. The 'New Document' form has three main sections: 'Name' (with a 'Name Required' label and a text box containing 'Doctor's note'), 'Date' (with a 'Date Required' label and a date picker showing '23/06/2022'), and 'File' (with a 'File Required' label, a 'Choose file' button, and a text box showing 'Resident V.1.4.8.docx'). A blue callout box with an arrow points to the 'Choose file' button, containing the text: 'If your file doesn't upload check the file type and if it's suitable'. Below the form is an information box stating: 'Info - The valid document types are: .doc, .docx, .dot, .dotx, .pdf, .xlsx, .xlt, .txt, .png, .jpeg, .tiff'. At the bottom are 'Back' and 'Upload' buttons.

## Documents (Downloading)

- 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

The screenshot shows the Coolcare web interface. On the left is a sidebar with navigation options: Dashboard, Care Home, Staff, Residents, Resident Records (highlighted), Accounts, Invoicing, Invoices, and Reports. The main area displays the profile of 'Sharpe Barry', including a photo, a 'Change Photo' button, and details like 'Absent (13 days)', 'Admission Date: 01/06/2022', 'Weekly Fee: £1000.00', 'Home: Moe's Home', 'Dependency Level: 1 - Low Risk', 'Care Type: Regular', and 'Covid-19 status: -'. Below this is a tabbed interface with 'Documents' selected. The 'Documents' section has buttons for '+ Insert', '- Delete', and '+ Download'. A table below shows a document entry with a checked checkbox, the name 'Doctor's note', and the date '23/06/2022'. A callout box with an arrow pointing to the 'Download' button and the document entry contains the text: 'Choose your document and 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 number of words, we recommend you save it as a Word document and upload it as a document.

See the above Uploading Documents for instructions on how to do this.

Date	Version	Reviewed By	Comments
27/07/2022	V4.6.13	Maurice Sharp	N/A