

Resident Contacts on CoolCare

In CoolCare you can insert as many contacts onto a resident record as necessary. In addition to the standard types of contacts, such as their Next of Kin and Family, you can also specify other types of contacts such as their Doctor, Social Worker or another Professional.

Creating and Amending Resident Contacts

- Navigate to the Resident's record
- Click on the Contacts tab on the top bar
- To insert a new contact click Insert
- Make sure that all required fields are filled in and click Save

The screenshot displays the 'New Contact' form within the CoolCare interface for resident Sharpe Barry. The form is divided into several sections:

- Contact Details:** Includes fields for Contact Type (dropdown), Title (dropdown), First Name, Middle Name(s), and Surname.
- Marketing Communication Preferences:** A section for consent to receive communications, with checkboxes for Telephone, Postal, Email, and Fax.
- Address:** Features an 'Address Search' field with a post code 'LS29 2DY' and a dropdown menu showing 'Ideal Carehomes (Three) Ltd, Helios 47, 1 Isabella Road, Ga'. Below this are fields for Address 1, Address 2, Address 3, Address 4, and Postcode.
- Telephone:** Includes fields for Daytime Telephone, Evening Telephone, Mobile, Email, and Relationship.

A callout box with an arrow pointing to the 'Address Search' field contains the text: "Use the post code search to populate the address. Add as much information as possible".

Resident Contacts Report

There is a report that will export all the contact information for all residents on CoolCare into a CSV file. This is particularly helpful if you require it for sending bulk communications out to all the resident contacts.

To run this report, follow the navigational steps below:

- Expand the Resident section by clicking Resident on the left-hand side of the screen
- Click Reports

- Click Resident Contacts, this report is in the Resident Details section of the reports

coolcare

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Click Resident Contacts to run the report

Date	Version	Reviewed By	Comments
29/07/2022	V4.6.13	Maurice Sharp	N/A