

Resident Reports on CoolCare

CoolCare offers lots of reporting options for residents, enabling you to run important information for your business in a few clicks of a button. To run any of these reports click on Residents and then reports on the left-hand side of the screen.

Handy Hint: When you print off the reports that display as a CSV file these are downloaded. If you cannot find the report when you have clicked to print it, press Ctrl and J on your keyboard. This will open the downloads list and if the report has downloaded correctly, it will be displaying at the top of this list.

Handy Hint: Use the show descriptions button to display a detailed description for each report.

Full Resident Report

The Full Resident Details report does exactly what it says on the tin. It prints off a full and detailed list of residents who were in the home within the specified Date Range.

This report is printed off as a CSV file. Because this is a CSV file you are able to delete and remove any columns of data you do not require to make the analysis easier.

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.

Resident Ledger

To see the balance of resident funds and their debits and credits during a period of your choosing, to run this report, you'll need to select the date range you are running the report for.

Resident Missing Information

To check if any resident records are missing vital information there is the Resident Missing Information report which when run off will produce a list of all resident records that are missing details on their records and tell you what information is missing.

Fire List

On CoolCare there is a report that can be run off to give an accurate head count of residents if for whatever reason you have to evacuate the home. This will print off a list of all Residents who are currently in the home and in a separate section of the report list all residents who are absent. However, this will only be accurate providing resident absences are recorded accurately in CoolCare.

Covid Vaccination Status

On CoolCare you can run a CSV file of your residents and their Covid Vaccination details at home, company and group level. The report will also contain room and bed records.

Fee Discrepancies

Available at home, group and company level, a CSV report of residents between weekly fees and their total fee contracts.

Missing Contracts

This report lists all residents who have not got at least one fee contract set up for billing and is available at home and company level. Able to view in a CSV file.

Resident by Funding

This report will allow you to choose by funding type and then view those residents in a CSV file, funding types can be amended under the Lookups option.

Invoice Analysis

Available at home, group and company level this report allows you to view whether invoices have been printed or exported and the invoice total within your selected date range.

In Home Between Dates

This report is run off to display what residents were active residents within the specified date range, it does not include any details about their absences however it does display their admission and, if applicable, their discharge date.

Resident Absences

In order to monitor the Resident Absences, you can run a report that will detail any absences within a date range. The report will give you a list of all residents who have been absent within your specified date range, the reason for the absence and the date they returned to the care home if they have returned.

Resident Discharge Report

This report is available at home and group level and will export a list of discharged residents between dates of your choosing.

Date	Version	Reviewed By	Comments
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