

adding resident documents to CoolCare.

The Documents Section is where you can enter any general notes and upload any documents to each resident record.

uploading documents to a resident

- Navigate to **Residents – Resident Records**
- Select the resident from the list, or use the search box to find them
- Navigate to **Documents - Documents**
- Click the **+Insert** button to add a new document
- Enter a name and date for the document and click **Choose File**
- Navigate to the location of the document on your computer and select it
- Click **Open**
- Click **Upload** to add the document to the resident record

Elizabeth Ainsworth

Room No: 10A Dependency Level: 1 - Low Risk
Admission Date: 02/11/2023 Care Type: Residential
Weekly Fee: £820.00 Covid-19 status: -
Home: Sam's Home

General Admission & Discharge ▼ Billing ▼ Contacts **Documents ▼** Rooms Absences Vaccination

New Document

Name Required

Date Required

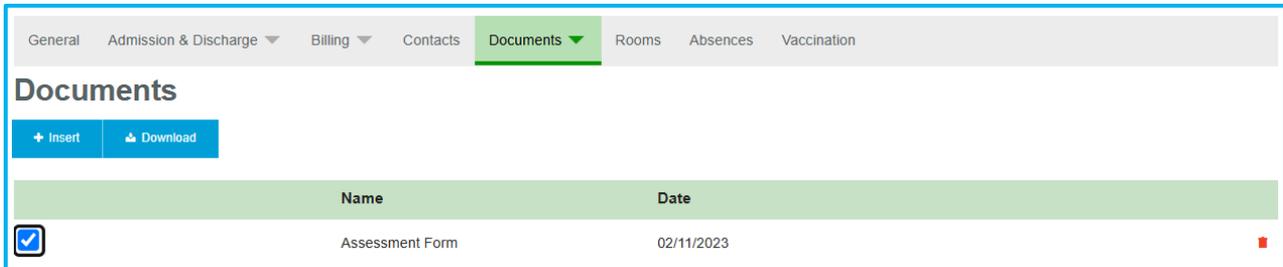
File Required
 No file chosen

Info - The valid document types are: .doc, .docx, .dot, .dotx, .pdf, .xlsx, .xlt, .xls, .png, .jpeg, .tiff

Please note: Only certain file types can be uploaded to CoolCare, please ensure you are uploading a valid document type for it to be saved.

downloading documents from a resident.

- Navigate to **Residents – Resident Records**
- Select the resident from the list, or use the search box to find them
- Navigate to **Documents - Documents**
- Tick the box for the document you wish to download
- Click the **Download** button



Handy Hint: If you cannot see the downloaded document, press **Ctrl + J** to bring up downloads list on your web browser.

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.

To find the notes page:

- Navigate to **Residents – Resident Records**
- Select the resident from the list, or use the search box to find them
- Navigate to **Documents – General notes**

