

group setup in coolcare.

CoolCare offers a range of group level settings that relate to all homes within your group, allowing uniform control across all areas. These settings mostly relate to invoicing, but also include some staff related settings as well. Please note there are also settings that can be controlled at individual home level, please see our Home Setup guide for those options.

system configuration.

The system configuration is used for setting group wide parameters in CoolCare. Anything set in here will affect every home in your database. Some of these settings can also be configured at individual home level, if this is possible there will be a tick box that can be ticked to set these settings at home level.

updating system settings.

- Click your name in the top right corner to access the system menu
- Select **System Configuration**
- Update settings
- Click **Save**

The screenshot shows the 'System Configuration' interface. At the top right, there is a user profile for 'Sam Reynolds' and a dropdown menu. The main heading is 'System Configuration'. Below it are three tabs: 'Invoicing' (selected), 'Staff', and 'Email Invoicing'. The 'General' section contains several form fields: 'Export Program' (Xero), 'Invoice Template' (Template 2 (With Logo)), 'Collect Direct Debit After' (10 Days), and 'Invoices due after (excluding direct debits)'. To the right, there are three text areas for 'Invoice Header Description', 'Invoice Item Description', and 'Invoice Item Export Description'. At the bottom, the 'Group Logo' section has an 'Upload Group Logo' button and shows 'Uploaded Logo: CoolcareLogo.jpeg'. A sidebar on the right lists various system management options.

Please Note: Updating system configuration settings can have irreversible effects on CoolCare, if you are unsure what a configuration option does, please check with the support team before making any changes on 0113 385 3853 or email support@coolcare.co.uk

invoicing settings.

These are the settings that will need to be configured for your finance department to run payroll and invoices to the best of their ability in CoolCare. Some of these settings are essential to the running of invoicing, such as the export program.

export program.

This is where you select the accounting software package you use. Simply select the accounting software from the drop-down box to set this. Selecting the export program applies changes across all the homes in your group. You can only choose one export program across all your homes.

invoice templates.

You can configure what your invoices will look like when printed off using the pre-set templates available in CoolCare. Examples of the available templates can be found in our *Invoice Template Examples* guide.

invoice header/item/item export descriptions.

These fields are used to configure the text that will be generated on the invoices. Enter what you want to display for the invoice's header, footer or items. The header description is the first line on an invoice, the item description is the item line, and the export description is if the description on the csv export needs to be different from the item description. If left blank it will use whatever is in the invoice item description above.

Variable keywords can be used to customise the invoice when created. For example, you can use the variable \$CLINAME, which will display the relevant resident's name when the invoice is printed. To view all available variable keywords, hover your mouse cursor over the *i* icon next to the title. These variables are case sensitive so you will need to make sure when entering them they are exactly how they are stated in the tool tip.

Please Note: The invoice descriptions can be overridden at fee contract level, so if you have a unique contract that requires it's own description, this can be done there. See our invoicing guides for more information on setting up the overrides.

show resident name on transactions file

Some specific export programs will show this additional setting, allowing you to add the resident's name to the final output file exported from CoolCare.

collect direct debit after.

Use this field to specify in the system when you will collect direct debit payments, from the date of the invoice. Some accounting packages may require this information when importing the data from CoolCare.

invoices due after.

Use this field specify in the system how long after invoices are sent out that payment is due. Some accounting packages may require this information when importing the data from CoolCare.

group logo.

Use this to upload your company's logo which can appear on invoices. The logo image has to be a **.jpeg** file and be no larger than 2MB. We suggest the image's resolution to be 200x100, as any larger may cause invoices to load slowly when processing.

headers and footers.

Similar to the invoice descriptions mentioned above, these fields allow you to configure the text that is generated on printed invoices. They are separated into the different invoice payment types; cash, cheque, standing orders, direct debit and BACs. Like the invoices, you can use variable keywords to customise these fields, and footers can also be overridden at home level if you tick the box that says *Use Home Level Footer*.

Headers and Footers

Use Home Level Footer

Payment Type	Header	Footer
Cash	Cash Header (0/500)	Cash Footer (12/1000) Group Footer
Cheque	Cheque Header (0/500)	Cheque Footer (56/1000) Group CHEQUE Footer Please make cheque payable to \$CHQTO
Standing Order	Standing Order Header (0/500)	Standing Order Footer (13/1000) Group Footer
Direct Debit	Direct Debit Header (0/500)	Direct Debit Footer (19/1000) Group Footer \$DDCOL
BAC	BAC Header (0/500)	BAC Footer (30/1000) Group BAC Footer \$CHQTO \$DDCOL

VAT codes.

Use this field to specify the VAT amount for each different VAT code you use. Each fee contract created on CoolCare requires this, therefore you must set the standard default in the **VAT Code for fee contracts**. Some accounting packages may require this information when importing the data from CoolCare. The VAT codes are linked to the Invoicing in CoolCare, you can set a default VAT Code for Fees and can select other VAT codes for extra items like billable extras.

VAT

VAT Code for fee contracts

EX

VAT Code	Rate (%)
EX	0.00
T0	0.00
T1	20.00
T2	0.00

staff settings.

These settings relate to your staff records in CoolCare and different features within the staff section such as holidays, payroll and recruitment. Some of these are essential to certain features of CoolCare, such as running payroll.

holiday year start date.

This is the start date of your current holiday year. This will affect all staff members holiday entitlement within your group. If **Holidays Per Home** is selected, the holiday start date will be ignored. To set the holiday start date for the entire group, ensure holidays per home is not selected.

holidays per home.

If each of your care homes' holiday year is different within the group, then this box should be checked. You must then set the holiday year start date in the home setup page.

exceed holiday allowance.

This will enable staff to take more holidays than they are entitled to for the holiday year. If this is not checked a warning will be presented to users if they attempt to authorise holidays when the staff member has already exceeded their yearly entitlement.

EU calculation factor.

This defines the percentage of worked hours that will be calculated as holiday entitlement for any bank staff in the group.

include holiday/absence/other hours in EU calculation.

These 3 tick boxes can be enabled if you want holiday, absence and other hours to count towards the calculation of bank staff holiday entitlement.

bank staff holiday pay.

This setting defines how bank staff are paid holiday entitlement. It can be either **as accrued**, meaning it will be included on payroll automatically when it is run, or **as taken**, meaning the holidays have to be added to the calendar to be included on payroll for bank staff.

Please Note: This setting cannot be changed by users in your system, you would need to contact CoolCare's support team to update this setting.

pay type.

Depending on how you manage your payroll, the way CoolCare works will change. You therefore need to specify what payroll package you use or whether you will use the pay rates setting. Please see our payroll guides for more information on this setting and what to use.

pay pool staff from main home.

This setting relates to any pool staff that work between multiple homes and how they are paid. If enabled, all hours across all homes for pool staff will be collated onto their main home, i.e. the home their staff record is in. If not enabled, the staff member's hours will appear in payroll across all the homes they work in.

enable bulk authorisation feature.

This setting allows users will the ability to lock the timesheet to also authorise all shifts on the timesheet when locking it. For more information on this, please see our timesheet guide.

between appraisals.

This is the renewal period for your staff appraisals. This can be set in either months or weeks. When adding an appraisal to a staff record, CoolCare will calculate when the next appraisal is due based on this information.

between supervised sessions

This is the renewal period for your staff supervisions. This can be set in either months or weeks. When adding a supervised session to a staff record, CoolCare will calculate when the next appraisal is due based on this information.

break deductions.

Break deductions enable the system to automatically deduct time from shifts where staff members have worked more than a certain number of hours for breaks on the timesheets. You must enter the number of hours a staff member needs to work in order to be entitled to the deduction and the minutes that are to be deducted when these hours have been reached. The reductions are cumulative. Break deductions can be overridden at home and position level.

Break Deductions

Break deductions are applied to all shifts that have break deductions enabled.
These deductions can be overridden at both home level, and position level. ⓘ

Include Unsnapped Shifts when Applying Break Deductions ⓘ

After Working	Deduct
<input type="text" value="4"/> Hours	<input type="text" value="15"/> Minutes
After Working	Deduct
<input type="text" value="6"/> Hours	<input type="text" value="15"/> Minutes
After Working	Deduct
<input type="text" value="12"/> Hours	<input type="text" value="30"/> Minutes

Please Note: Whilst the rules for break deductions can be set at group level, you can decide against each position, per home, whether you want those rules to apply. Break deductions will only apply to shifts set up under the position that have break deductions enabled. See "Staff Positions" for how to set Break Deductions for each position.

include unsnapped shifts when applying break deductions.

This additional setting specifies how breaks are deducted. By default, CoolCare only deducts break from hours that have snapped to shift on the timesheet. If this setting is enabled, any hours that don't snap to shift will also have breaks deducted.

DBS expiry check period.

This setting allows you to set how often you would want to check DBS details for staff members. When you add a DBS issued date to a staff record, this setting will be used to work out the expiry date.

hide worked hours in staff portal.

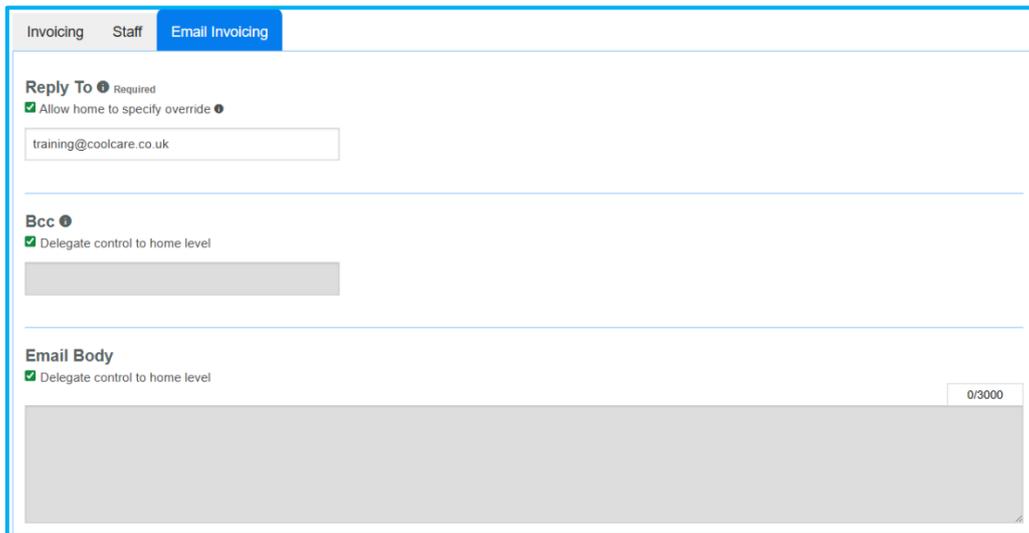
If you enable this setting, the staff portal will not display worked hours from the timesheet to staff members, only showing their rota shifts, as well as holidays, absences and training from the calendar.

transfer applicant documents to staff record upon hiring.

If this setting is enabled, it allows you to transfer any documents uploaded to the applicant page of the recruitment section to the new staff record if the applicant is hired via the recruitment section.

email invoicing settings.

These settings will need to be configure if you plan to use CoolCare to send out invoices via email. For full setup instructions please check our email invoicing guide.



reply to.

This field specifies what email address will receive any replies to email invoices sent out from CoolCare. It is a required field, and you cannot send email invoices without a reply to email set up. You can tick the box that says *Allow home to specify override* if the individual homes would have separate email addresses for replies to go to, however you still require an email address in this field as well.

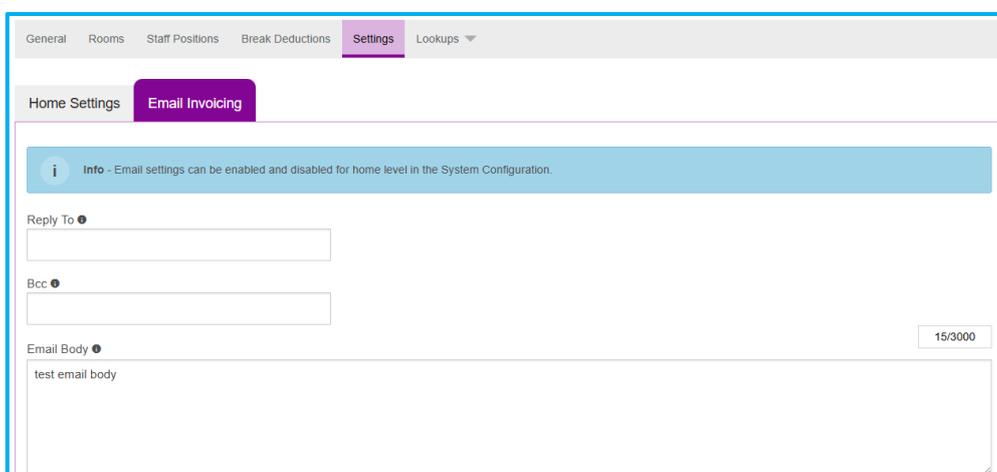
bcc.

This field specifies an email address to receive a copy of any email invoices sent from CoolCare. Ticking the box that says *Delegate control to home level* allows this email address to be set for homes individually rather than at group level.

email body.

This field allows you to specify what is written in the body of the email invoices sent out from CoolCare, with the invoice itself being an attachment to the email. Please note this field is merely plain text, so does not allow for any images or email signatures. Ticking the box that says *Delegate control to home level* allows the email body to be set for homes individually rather than at group level.

Please Note: All home level versions of these settings can be found by going to **Care Home – Home Setup – Settings – Email Invoicing** for each home on CoolCare individually.

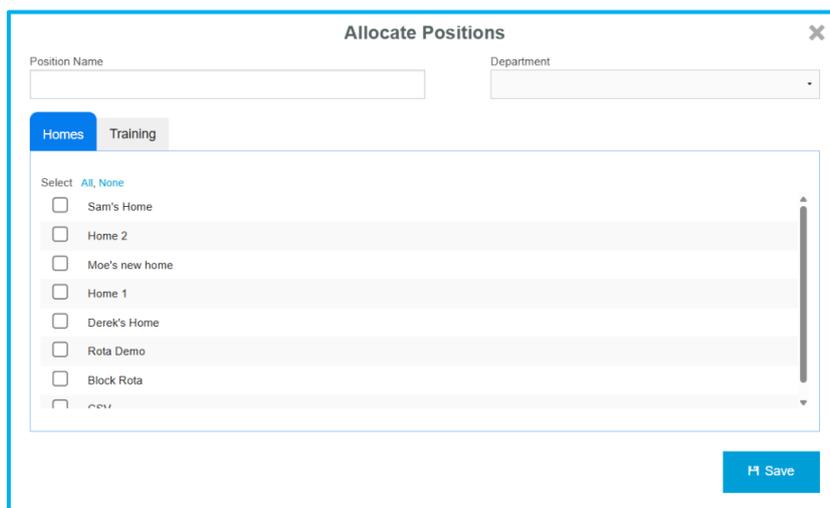


group positions.

On CoolCare, staff positions are managed at both group and home level. The positions themselves are inserted at group level, whilst the shifts and pay elements are set up at home level.

adding a new staff position.

- Click on your name in the top-right corner of CoolCare to access the System Menu
- Select **Group Positions**
- Click **Insert**
- Enter a name for the position, select what department it belongs to and tick each home that the position needs to be available in
- Click **Save**

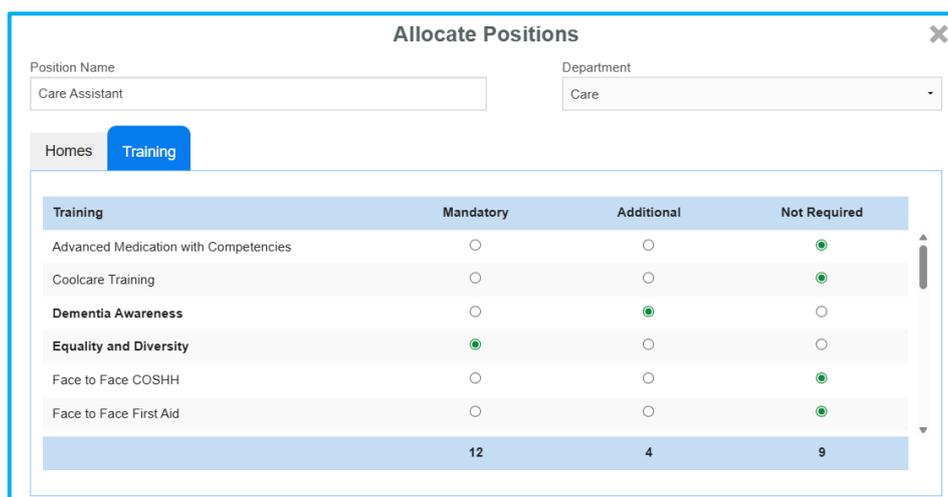


The screenshot shows the 'Allocate Positions' form with the 'Homes' tab selected. The 'Position Name' field is empty, and the 'Department' dropdown is set to 'Care'. The list of homes includes: Sam's Home, Home 2, Moe's new home, Home 1, Derek's Home, Rota Demo, Block Rota, and a partially visible 'New' option. A 'Save' button is located at the bottom right of the form.

Please Note: Departments are set up in the **Departments** lookup under the **Lookups** page. For more information on adding an editing the lookups, please see our guide **Adding & Amending Lookups**.

allocating training to staff positions.

When you set up staff positions you can specify if a training course is required or not for that position. This allows you to keep a track of what training is still outstanding for a staff member if it is mandatory for their position. Mandatory training is any training that a staff member needs to have to work, these training courses can be monitored via the training compliance dashboard widget and training matrix report.



The screenshot shows the 'Allocate Positions' form with the 'Training' tab selected. The 'Position Name' is 'Care Assistant' and the 'Department' is 'Care'. The training matrix table is as follows:

Training	Mandatory	Additional	Not Required
Advanced Medication with Competencies	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Coolcare Training	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Dementia Awareness	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Equality and Diversity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Face to Face COSHH	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Face to Face First Aid	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	12	4	9

Please Note: If you need to add additional training courses to CoolCare, this can be done via the **Qualifications** lookup. For more information, please see our lookups guide.