Home Setup in CoolCare

Anything configured at home level in CoolCare will only affect the individual care home it has been set for. These settings will not affect any other homes in the group. For group level settings, please see our Group Setup guide.

Updating Home Settings

- Click "Care Home" from the left Menu.
- Click "Home Setup"
- Click the Settings tab.
- Update settings.
- Click "Save"

Staff & Payroll Settings

Holiday Start Date

This is where you set the start date of your current holiday year. This will need to be updated annually and resets the accrued holiday of each staff member. You only need to set and amend this if the "Holidays by Home" setting is ticked in System Configuration.

Geolocation

Geolocation is the location where the care home is situated. This information is used to specify if a statutory holiday and increased rates are applicable for this home.

Payment Frequency

This is the frequency in which the care home will run payroll. Some payroll software may require this information when uploading hours from CoolCare.

Rota/Timesheet Configuration

These settings control whether a staff member's 'clock ins/outs' snap to a predefined shift and whether any deductions should apply if they clock in early or out late. Shift definitions are set up within the staff positions. 'Snapping to shift' is where the timesheets will automatically correct hours to a predefined shift if staff have clocked in close to shift start / end times. For further information please check our Rota/Timesheet Configuration mini guide.

Snapping to Shift Controls

Before Shift Start

This is how long before a shift starts that a staff member can clock in and it will snap to shift.

After Shift Ends

This is how long after a shift ends that a staff member can clock out and it will snap to shift.

Snap to Shift Limit Time

This is how long after a shift starts and how long before a shift ends that a staff member can clock in or out and still snap to their shift
All of the above rules must be followed in order for a shift to snap to shift.

Deductions

After Shift Start and Arrive Late Dock Interval

After Shift Start is how long after the shift has started that the staff member can clock in before they are deducted.
Arrive Late Dock Interval is how many minutes should be deducted.

Before Shift Ends and Leave Early Dock Interval

Before Shift Ends is how long before the shift has ended that the staff member can clock out before they are deducted.
Leave Early Dock Interval is how many minutes should be deducted.

Hour Rounding Interval (Not Snapped Only)

If the clock in and out does not snap to shift, the clock in time will be rounded up to the next time in the Hour Rounding Interval and the clock out time will be rounded down to the next time in the Hour Rounding Interval. For example, if the Hour Rounding Interval is set to 15, if a staff member clocks in at 08:16 their clock in time will be rounded up to 08:30 and if they clock out at 17:14 it will round their clock out time down to 17:00.

All Shift Break at Midnight

This setting applies to any overnight shifts on your rota. When enabled, any shifts that are split at midnight that snap to a shift definition will no longer have breaks deducted from them.

Link Absence to Rota

This setting allows to absences to be authorised only if the staff member has a rota shift on the same day as their requested absence. If the setting is disabled then absences can be authorised on any days.

Sage Settings

In here you can set the Sage specific settings. Some versions of Sage require this information when importing invoices.
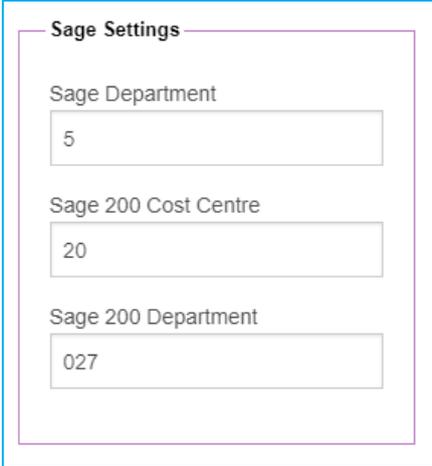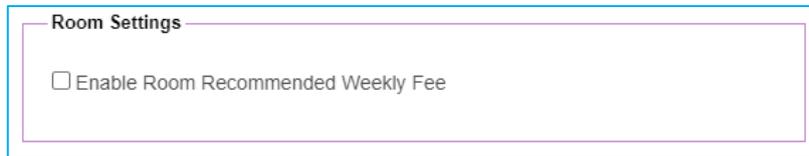
Room Settings

Here you can enable the Room Recommended Weekly Fee, which adds a field to each room's settings where you can input a standard weekly fee.
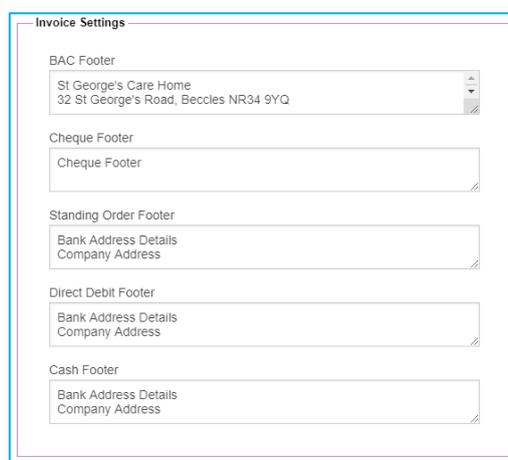

Invoice Settings

In these fields you can specify the invoice footer descriptions per home. In order for these to display on the invoice ensure that you have checked the 'Use Home Footers' in the system configuration settings.

Email Invoicing

On the settings page there is also a tab for email invoicing settings; these are for any of the email invoicing settings from System Configuration enabled at home level. Please see the Email Invoicing in our System Configuration guide or the Email Invoicing mini guide for more information.
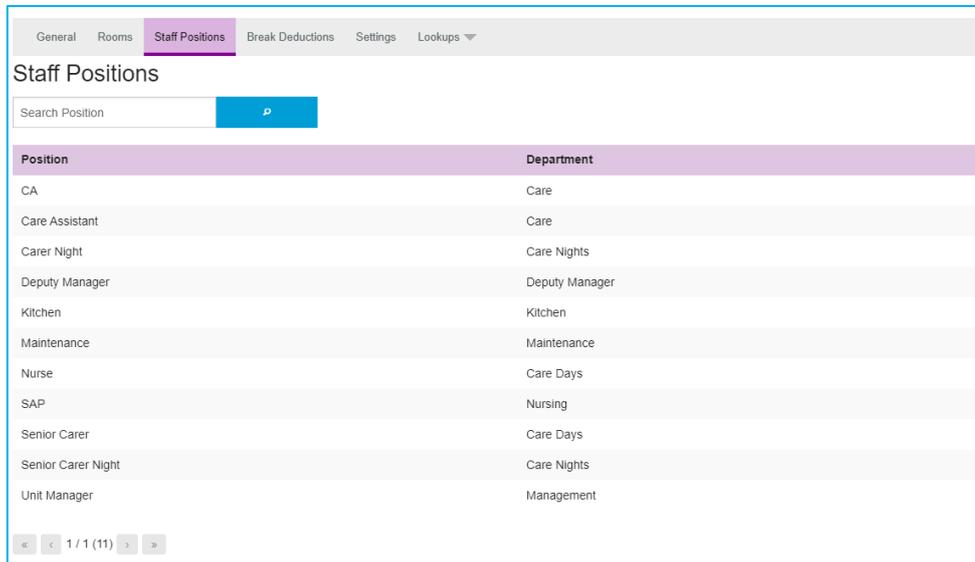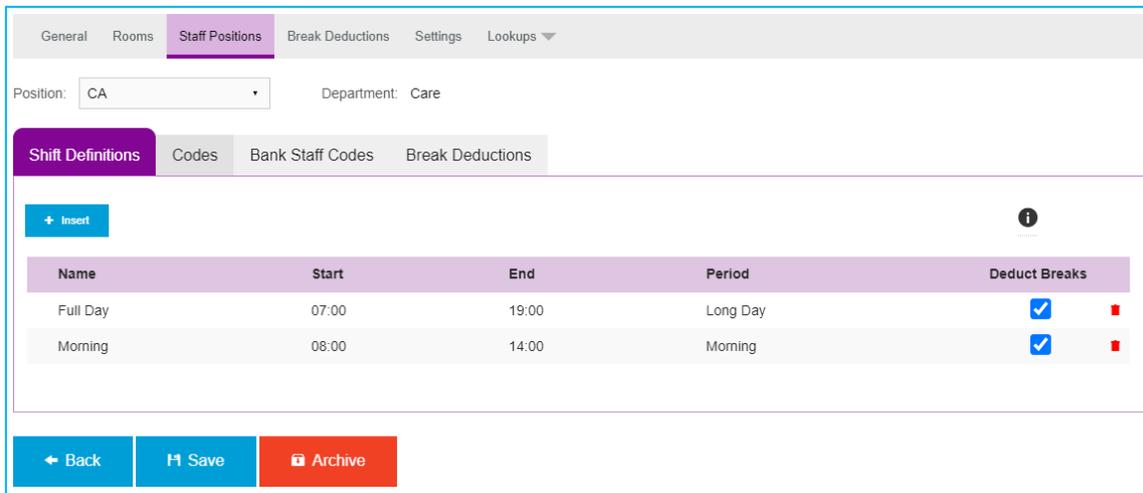
Staff Positions

Whilst the Staff Positions are set up at group level there are also some settings that need to be configured for the Positions at Home Level.

Shift Definitions

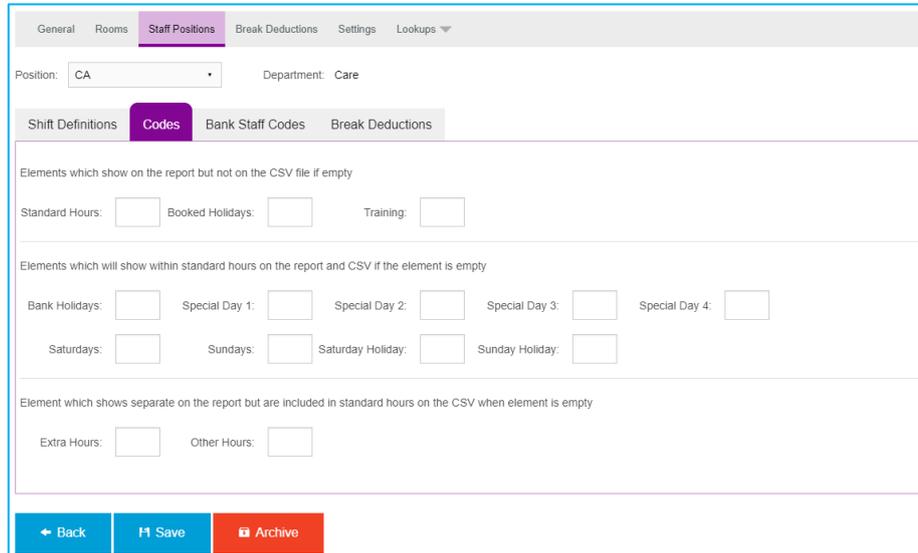Shifts are used for snapping to shift on the timesheets and for planning shifts in the rota.

Inserting a Shift

- Select a position from the positions list.
- It should open on the 'Shift Definition' tab
- Click 'Insert'
- Enter the details:
- Period: this relates to the day period which will be used to flag under/over budget staff within the rota.
- Deduct Breaks: this will enable the break deduction set in system config to apply to this shift.
- Click 'Save' when completed

Pay Elements must be set up to run Payroll and shift definitions must be set up in order to assign shifts in the Rota.

Pay Codes/Elements

Payroll elements and codes are used within the payroll report. If the position has a different code for bank staff and permanent staff then you will need to enter the codes or elements into codes and bank staff codes. Special Days can be any days that you would pay your staff an enhanced rate of pay such as Christmas Day or New Year's Day, you have 4 of these available for use. To set up the days that the Special Days are used please see our Adding & Amending Lookups guide.

Inserting Pay Codes/Elements

- Click on Care Home
- Click Home Setup
- Click Staff Positions
- Select a position from the positions list.
- Click 'Codes' or 'Bank Staff Codes' tabs
- Enter the rates or elements
- Click 'Save' when completed.

On CoolCare you do not need to separate your staff positions between bank and permanent because you can set up pay codes for permanent staff and bank staff on the same Staff Position.

Lookups

These are a few lookups that can be customised for the home, relating to residents and billing. For more information, please see our guide on Adding & Amending Lookups. To access these lookups:

- Click 'Care Home'
- Click 'Home Setup'
- Click 'Lookups'
- Select the lookup you wish to view or amend:

Nominal Codes

Nominal codes are used within Sage and similar accounting software, you should specify all nominals that are associated with fees or billable extras in this Lookup.

Billable Extra Types

Billable extras need to be associated with a nominal code to ensure they have the correct description when importing your invoices to your accounting software. Before inserting Billable Extra Types make sure you have set up the nominal codes for the Billable Extra Types you are inserting.

Care Types

Although care types are not a standard financial lookup, if you allocate a default nominal for each care type it will ensure that when invoices are generated in CoolCare, they will have a nominal code associated with the resident's care type, which your accounting package may require when importing.