

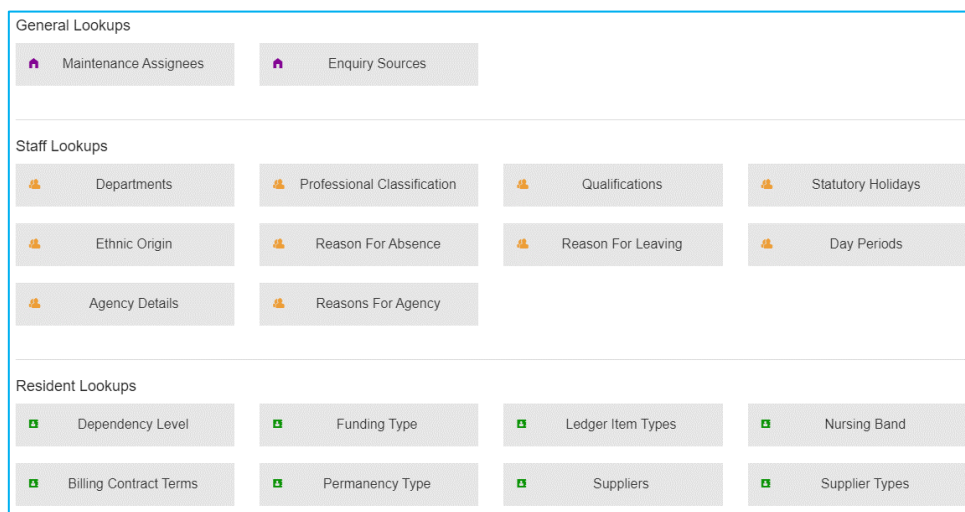
Adding and Amending Lookups in CoolCare

In CoolCare, lookups are configurable items which can populate different drop-down menus based on information entered into them. There are 2 types; Group Lookups and Home Lookups.

Group Lookups

Group lookups apply to every home in the group, and include most of the lookups you would need on the system.

- Click your name in the top right corner of CoolCare
- Select Lookups in the drop-down menu that appears
- The below screen will appear; some options may be missing depending on your permissions



Group lookups are separated in to 3 categories; **General**, **Staff** and **Resident**. Select any of the lookups to view what items they currently include, as well as inserting new items for the lookup and amending the existing ones. For more information on each lookup, please see below.

Home Lookups

These lookups are customised at home level, and only apply to the home you create them for. For more information on each lookup, please see below.

- Click **Care Home** on the left-hand menu in CoolCare
- Select **Home Setup** on the options that appear
- Select the **Lookups** tab on the Home Setup page and select the lookup you wish to add to or amend

Group Lookups - General Lookups

Maintenance Assignees

Used in the maintenance section, these specify who can be assigned to maintenance tasks. The lookup includes their name and email address.

Enquiry Sources

Used in enquires, these are different places where a potential resident may have heard about the home. The lookup is just the name of the source, no further information is required.

Group Lookups - Staff Lookups

Departments

This lookup is specified to show as an option in the Staff Position. Your staff positions will then be classed by these departments. For example, you may have a department for "Care" and one for "Maintenance". These departments link to the staff positions only, not the rota.

Professional Classification

This is a list of all professional classifications within your care homes which can be associated to staff member files. For example, RGN.

Qualification

This is for setting up what Training Qualifications are available to be assigned to a staff member. You can specify whether they are renewable and how long they are valid for. Training courses must be in here to be able to be added in the training calendar and on the Staff Record.

If you set a renewal period for a training course, it will highlight whether any of your staff's training records have expired or are due to expire.

Statutory Holiday

This is for setting up which days in the year are Statutory Holidays. You can specify special pay codes for each day and what part of the UK they are valid in.

You can specify what pay code you will pay staff members for if they work on these days when inserting them. This enables you to pay double time or other rates on specific bank holidays like Christmas Day. For more information on this please see Pay Codes/Elements under the Home Level Staff Positions in this guide.

Ethnic Origin

This is a list of all ethnic origins which can be associated to staff member files. You can insert additional ones if required.

Reason for Absence

There are standard reasons for absence that are automatically inserted in CoolCare. If you require additional ones or want to remove any of the standard ones you would use this Lookup. The reason must be in here for you to be able to use it when creating an absence in the calendar.

Reason for Leaving

There are several standard reasons that are included as defaults on CoolCare, however if you need to insert additional ones you can which are used when processing leavers.

Day Period

Day Periods are used in the rota setup and rota. They are used to aid monitoring if you have the correct level of staff in the home at the right time.

Each shift you add to CoolCare is assigned a day period e.g., early, late. When shifts are added to the set-up rota, CoolCare will count how many shifts of each day period there are and create budgets for each shift group, based on the day periods the shifts you have selected are allocated to. On the actual rota CoolCare, when staff are assigned to shift patterns, it will indicate if you are under or over staffed against your budget by day period. For more information on the Rota please refer to the Rota guide.

Agency Details

Used to input names of different agencies that may need to cover shifts on the rota. When assigning a shift to agency, these will be in the "Name of Agency" field.

Reason for Agency

Different reasons that agency cover is needed. When assigning a shift to agency, these will be in the "Reason for Agency" field.

Group Lookups - Resident Lookups

Dependency Level

These are used in the Residency Details section of a resident record, specifying the level of care a resident may need. For example, low to high risk.

Funding type

This section allows you to create the types of funding that are available in your care home i.e., Private, LA.

Ledger Item Types

Adding Ledger Item Types sets the items that are available in the different ledgers on the system i.e., gardening, provisions/food etc.

Nursing Band

Like the dependency level, these are used in the Residency Details, specifying the level of nursing care a resident may need.

Billing Contract Terms

This is used for setting up your billing contracts terms for each of your financial contracts i.e., respite, private respite, LA etc.

- 'Anonymise Invoices' allows you to use a unique reference number on invoices rather than the Resident's personal details.
- 'Bill Discharge Date' controls if the payee will be charged for the date of discharge.
- 'Bill Additional days....' options control how many additional days the payee will be charged after discharge/death.
- If the billing contract terms is a private contract you will need to enter the payees address per account, alternatively enter the address into the billing contract terms and it will automatically populate into the account.
- CoolCare can automatically reduce fee's when a resident has been absence for a period of time, enter the reduction % and the number of days the resident should be absent before the reduction will start.

Permanency Type

Used in the Residency Details section of the resident record, this specifies whether a resident is permanent, temporary or otherwise.

Suppliers

These are the actual Suppliers for the billable extras e.g., the newsagent that newspapers come from.

Supplier Types

This is used for setting up the types of billable extra types that your care homes use e.g., Chiropody, Hairdressing.

Home Lookups

These lookups are customised at home level, and only apply to the home you create them for.

- Click 'Care Home'
- Click 'Home Setup'
- Click 'Lookups'

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.