Contract Invoicing on CoolCare

Introduction

This guide explains how to use CoolCare4 to bill for one or multiple rooms as part of a larger contract, regardless of if a resident is currently occupying the room or not. You do not put any live resident records in this room, this is purely for Block Beds that are unoccupied at the time.

Create a Room
To start, you will need to create a room for the whole block bed contract. You will need to create a room for each council/contract that you have

- Select care home
- Select home setup
- Select rooms
- Insert a room called "XXX BLOCK BEDS"
- Rename XXX to differentiate contracts e.g. "CoolCare BLOCK BEDS" for "CoolCare Home"
- Enter "A" into the Bed field
- Enter a Date Inactive from the previous financial year to exclude from occupancy reporting

Create a Block Bed Record

Next you need to create a resident record, this record will be used to configure and manage billing the block bed contract.

- Select resident
- Select resident records
- Select insert
- Enter the start date for billing in the admission date field.
- Select the room you created in the previous step*
- Enter the name of the council/contract in the resident name fields. E.g.Hospital/Council

- Follow the resident creation wizard to create the record
- Enter the weekly fee as the combined total weekly fee for all beds within the contract.

When selecting the room you will see the status is currently inactive, when you select the room a warning will say that the room is inactive, you can ignore this and proceed to the next page.

Create the Fee Contract

Now you have the resident record you can create the Fee Contracts. There are two ways to manage this element. You can create multiple fee contracts for each room, these will appear as separate invoices or you can create one large fee contract which will mean it generates one invoice. However, when you start to bill the 3rd party for actual residents, they will be separate invoices

- Open the resident record you have just created
- Select the billing dropdown option and select fee contracts
- Select insert at the bottom
- Enter the weekly fee. If you are creating one large contract, enter the total weekly fee
- Complete the rest of the required field
- The contracts start date is the date you will start billing from CoolCare4
- Repeat the above steps for additional fee contracts if you prefer separate invoices.

Tip: if you're creating multiple accounts for the block bed contracts use ROOM1, ROOM2, and let us know, we can set an override to allow you to download/upload to your financial software as one account.

Managing the fee contract – One Single Contract for all rooms

When a resident occupies or leaves a block contract bed, you will need to setup and manage the billing from the residents record as normal, and decrease/increase the billing for that room within the block bed contract previously setup, otherwise you will invoice twice.

To amend the block bed, you will need to enter contribution changes to the fee contracts, to do this:

- Open the fee contract for the block bed contract
- Select the contribution changes tab
- Select new contract change
- Enter the date effective as the admission (or leave) date for the resident
- Enter the new weekly fee amount that will be billed from this contract.

Effective From	Weekly Contribution	Last Modified By	Date Modified
17/01/2022	£9000.00	Sys Administrator	05/01/2022
10/01/2022	£8000.00	Sys Administrator	05/01/2022
03/01/2022	£9000.00	Sys Administrator	05/01/2022
01/01/2022	£10000.00	Sys Administrator	05/01/2022

Example: If you charge £1,000 a week per room and have currently 10 block beds that are empty (£10,000 total) and a resident has come in and occupied one of them you would insert a contribution change with the contribution as £9,000 with the date effective as the admission date of the actual resident, when the resident leaves, you will add a contribution change back to £10,000.

Managing the fee contract – individual contracts

When a resident occupies or leaves a block contract bed, you will need to setup and manage the billing from the residents record as normal, and decrease/increase the billing for that room within the block bed contract previously setup, otherwise you will invoice twice.

When a resident is admitted into a block bed room:

- Open up the fee contract that relates to the bed the resident has occupied
- Change the contract end date to the day before the resident's admission date

When the resident leaves a block bed room:

- Open up the fee contract that relates to the bed the resident is leaving
- Select contributions changes and enter a contribution
- Set the date as the resident's admission date
- Set the amount as £0.00
- Insert a new contribution change:
- Set the date as the resident discharge date
- Set the amount of the amount the contract is to be billed
- Remove the contract end date from the general tab of the fee contract

Tip: whenever you are making changes to the fee contracts when a bed is filled it's also important to update the weekly fee of the "resident" record that the Block Bed contracts are held on. This is to prevent warnings of fee contracts not matching the total fees.

New Contract Change

Effective From	Weekly Contribution	Last Modified By	Date Modified
01/03/2022	£1000.00	Sys Administrator	05/01/2022
23/01/2022	£0.00	Sys Administrator	05/01/2022
01/01/2022	£1000.00	Sys Administrator	05/01/2022

Invoice Adjustments

Created	Amount	Description

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