

Group Setup in CoolCare

CoolCare offers a range of group level settings that relate to all of the 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 on 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.

How to Update Settings

- Click your name in the top right corner to access the System Menu
- Click "System Configuration"
- Update settings.
- Click "Save"

Sam's Home Sam Reynolds

System Configuration

Invoicing Staff Email Invoicing

General

Export Program
SageLine50

Invoice Template
Template 1 (With Logo)

Collect Direct Debit After
10 Days

Invoices due after (excluding direct debits)
Days

Invoice Header Description ⓘ
\$TYPE Care for \$CLINAME in Room \$ROOM at \$HOME for \$DAY \$SD to \$ED

Invoice Item Description ⓘ
Fees at £\$WEEK per week

Invoice Item Export Description ⓘ

☐ Show Resident Name on Transactions File ⓘ

System Configuration
Manage Users
Manage User Groups
Admin Adjustments
Group Positions
Lookups
Custom Reports
Live Support
User Guides
Logout

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@coolcare4.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 Payroll and Invoicing, such as the export program for both Invoicing and Payroll.

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 are available on request. Please email our Support Team at support@Coolcare4.co.uk to request the examples.

Invoice Headers Description/Item Description/Item Export Description

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, 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.

Variable keywords can be used to customise the invoice when printed. 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 '?' 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.

The invoice text can also be overridden at home level and can even be tailored the per fee contract. This should be used if your invoices have different textual content for different homes, or contracts.

See the Home Settings section for how to amend the invoice text at Home level and the Invoicing Guide for amending an individual fee contract invoice text.

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*.

The screenshot shows a web form titled "Headers and Footers". At the top left, there is a checkbox labeled "Use Home Level Footer" which is checked. Below this, the form is organized into two columns. The left column contains five header text boxes, each with a character count: "Cash Header" (0/500), "Cheque Header" (0/500), "Standing Order Header" (0/500), "Direct Debit Header" (0/500), and "BAC Header" (0/500). The right column contains five footer text boxes, each with a character count: "Cash Footer" (12/1000), "Cheque Footer" (56/1000), "Standing Order Footer" (13/1000), "Direct Debit Footer" (19/1000), and "BAC Footer" (30/1000). Some footer boxes contain pre-filled text: "Group Footer", "Group CHEQUE Footer Please make cheque payable to \$CHQTO", "Group Footer \$DDCOL", and "Group BAC Footer \$CHQTO \$DDCOL". Each text box has a small icon in the bottom right corner, likely for text formatting.

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 have the ability to select other VAT Codes for extra items like Billable Extras.

The screenshot shows the 'VAT Codes' configuration page. At the top, there is a dropdown menu labeled 'VAT Code for fee contracts' with 'T0' selected. Below this is a section titled 'VAT Code Rates' containing four rows, each with a label and a percentage input field:

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

Staff Settings

The screenshot shows the 'Staff Settings' page with three tabs: 'Invoicing', 'Staff' (selected), and 'Email Invoicing'. The page is divided into three main sections:

- Holidays**: Includes a 'Holiday Year Start Date' field set to '01/01/2022', checkboxes for 'Holidays Per Home' and 'Exceed Holiday Allowance', an 'EU Calculation Factor' field set to '12.07', and checkboxes for 'Include Holiday Hours in EU Calculation', 'Include Absence Hours in EU Calculation', and 'Include Other Hours in EU Calculation'. A note at the bottom states 'Bank staff holiday pay: "As accrued"'.
 - ☐ Holidays Per Home
 - ☐ Exceed Holiday Allowance
 - EU Calculation Factor: 12.07 %
 - ☐ Include Holiday Hours in EU Calculation
 - ☐ Include Absence Hours in EU Calculation
 - ☐ Include Other Hours in EU Calculation
 - Bank staff holiday pay: "As accrued"
- Payroll**: Includes a 'Pay Type' dropdown set to 'Sage CSV' and a checked checkbox for 'Pay Pool Staff from Main Home'.
 - Pay Type: Sage CSV
 - ☒ Pay Pool Staff from Main Home
- Appraisals & Supervisions**: Includes two rows for frequency settings.
 - Between Appraisals: 12 Months
 - Between Supervised Sessions: 3 Months

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 set-up section. Please note, if you select "Holiday Per Home", the Group Holiday Year Start Date will be ignored.

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 by group, ensure Holidays Per Home is not selected.

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.

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.

Between Appraisals

This is the renewal period for your staff Appraisals. This can be set in either months or weeks. CoolCare will calculate when the next appraisal is due based on this information. When staff do not have any appraisal information, their current appraisal has expired or will soon expire, this will feature in your dashboard widgets and exception reports.

Between Supervised Sessions

This is to set the amount of time between supervised sessions being due. This can be set in either months or weeks. CoolCare will calculate when the next supervised session is due based on this information.

Break Deductions

Break deductions enables 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.

Whilst the rules for Break Deductions will be set per group, 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.

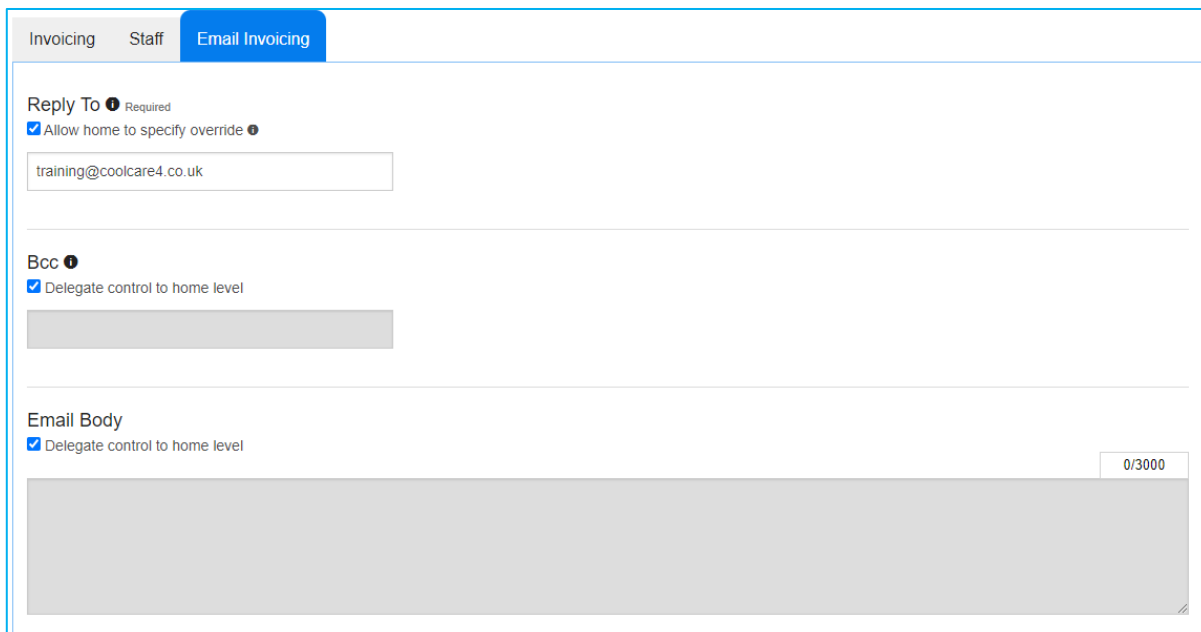
Break Deductions

Break deductions are applied to all shifts that have break deductions enabled. ⓘ

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

Email Invoicing Settings

These settings will need to be configured if you plan to use Coolcare to send out invoices via email. For full setup instructions please check our Email Invoicing guide.



The screenshot shows the 'Email Invoicing' settings page. At the top, there are three tabs: 'Invoicing', 'Staff', and 'Email Invoicing', with 'Email Invoicing' being the active tab. The form is divided into three main sections: 'Reply To', 'Bcc', and 'Email Body'. Each section has a checkbox for 'Allow home to specify override' and a text input field. The 'Reply To' section has a required field indicator (a red dot) and the email address 'training@coolcare4.co.uk' is entered. The 'Bcc' section has a checkbox for 'Delegate control to home level'. The 'Email Body' section has a checkbox for 'Delegate control to home level' and a character count '0/3000' in the top right corner of the text area.

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.

All of the 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.

Staff 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.

Inserting a Position

- Click on your name in the top-right corner of CoolCare to access the System Menu
- Click 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 on the Training tab and select each training course whether it is mandatory or not
- Click Save

Allocate Positions

Position Name

Department

Homes

Training

Select All, None

☐ Laburnum Cottage

☐ Oak House

☐ Maple House

☐ Training Grange

☐ Marvellous Grange

☐ Cedar Lodge

☐ Gilbert House

☐ Chestnut House

Save

Training

When you set up Staff Positions you have the ability to 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 in order to work, these training courses can be monitored via the Training Compliance dashboard widget and report.

Training Compliance Dashboard Widget

Staff members training is something that needs to be monitored, especially their mandatory training. The Training Compliance widget displays any staff that has incomplete or expiring soon mandatory training, there are two levels to the widget. If you are viewing the widget at group level then it will display the courses that are incomplete or expiring soon for the whole home. When you are at home level it will show a breakdown of the courses incomplete or expiring soon for each individual staff member. You can also view the list by the qualifications that have staff members with incomplete courses or courses that are expiring soon.

Training Compliance				<input checked="" type="radio"/> By Staff <input type="radio"/> By Qualification		
Name	Incomplete Courses			Courses Expiring Soon		
	Not Booked	Booked	Total	Not Booked	Booked	Total
COSHH	1	0	1	0	0	0
Equality and Diver...	19	0	19	0	0	0
Fire Drill Participa...	21	0	21	0	0	0
Fire Safety	8	1	9	0	0	0
First Aid Awareness	15	0	15	0	0	0
Food Hygiene	11	0	11	0	0	0
Health & Safety	12	1	13	0	0	0
Infection	11	0	11	0	0	0
MCA & DoLS Awa...	2	0	2	0	0	0
Manual Handling	20	0	20	0	0	0