

# 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"

The screenshot shows the 'System Configuration' page in CoolCare. At the top right, the user 'Sam Reynolds' is logged in. The page has a navigation bar with 'Invoicing', 'Staff', and 'Email Invoicing' tabs. The 'Invoicing' tab is active. The main content area is titled 'System Configuration' and contains a 'General' section with several settings:

- 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:** (Empty field)
- Show Resident Name on Transactions File:**

A sidebar menu on the right side of the page lists the following options: System Configuration, Manage Users, Manage User Groups, Admin Adjustments, Group Positions, Lookups, Custom Reports, Live Support, User Guides, and 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.

The screenshot shows the 'Invoicing' settings page. It features three tabs: 'Invoicing', 'Staff', and 'Email Invoicing'. The 'Invoicing' tab is active. Under the 'General' section, there are several configuration fields: 'Export Program' (a dropdown menu currently showing 'SageLine50'), 'Invoice Template' (a dropdown menu showing 'Template 1 (With Logo)'), 'Collect Direct Debit After' (an input field with '10' and a 'Days' button), 'Invoices due after (excluding direct debits)' (an input field and a 'Days' button), 'Invoice Header Description' (a text area containing a template with variables like \$TYPE, \$CLINAME, \$ROOM, \$HOME, \$DAYS, \$SD, and \$ED), 'Invoice Item Description' (a text area with 'Fees at £\$WEEK per week'), 'Invoice Item Export Description' (an empty text area), and a checkbox labeled 'Show Resident Name on Transactions File'.

## 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](mailto: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*.

**Headers and Footers**

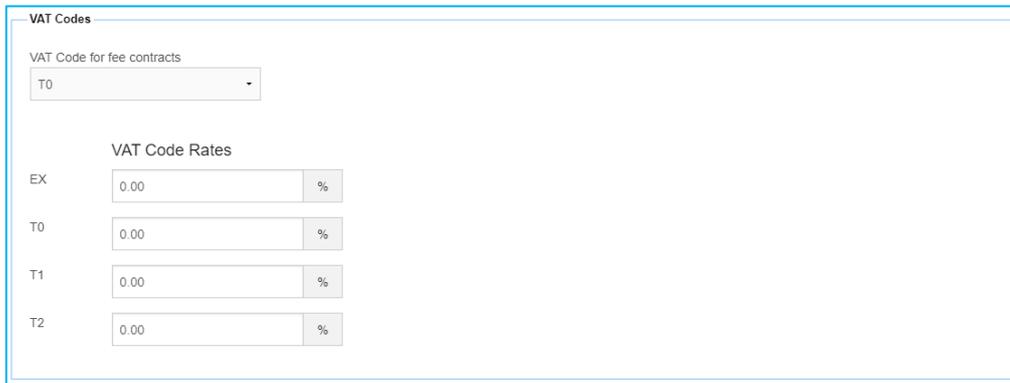
Use Home Level Footer

Cash Header	0/500	Cash Footer	12/1000
<input type="text"/>		Group Footer	<input type="text"/>
Cheque Header	0/500	Cheque Footer	56/1000
<input type="text"/>		Group CHEQUE Footer Please make cheque payable to \$CHQTO	<input type="text"/>
Standing Order Header	0/500	Standing Order Footer	13/1000
<input type="text"/>		Group Footer	<input type="text"/>
Direct Debit Header	0/500	Direct Debit Footer	19/1000
<input type="text"/>		Group Footer \$DDCOL	<input type="text"/>
BAC Header	0/500	BAC Footer	30/1000
<input type="text"/>		Group BAC Footer \$CHQTO \$DDCOL	<input type="text"/>

## 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.



VAT Codes

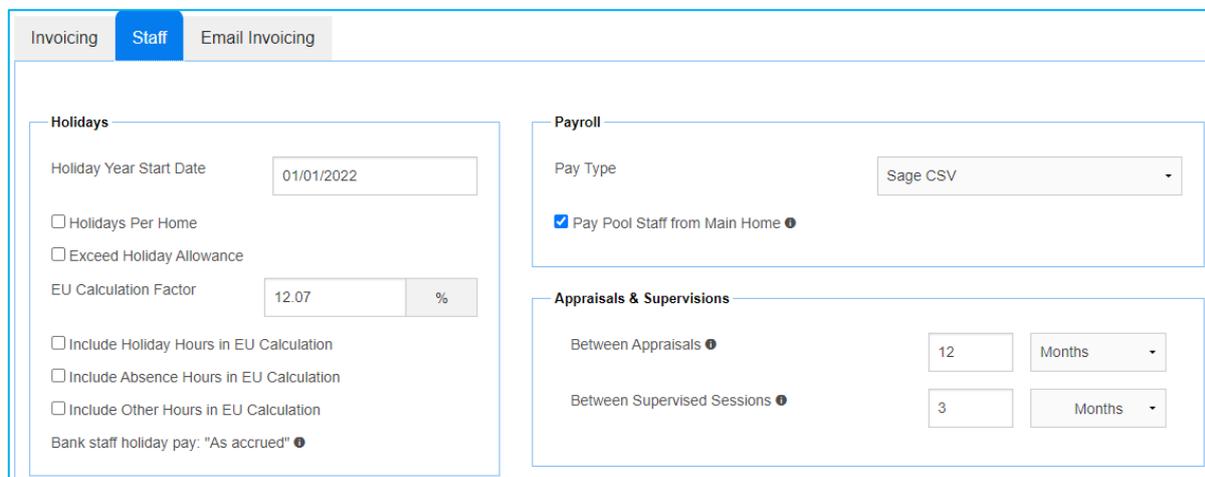
VAT Code for fee contracts

T0

VAT Code Rates

EX	0.00	%
T0	0.00	%
T1	0.00	%
T2	0.00	%

## Staff Settings



Invoicing **Staff** Email Invoicing

**Holidays**

Holiday Year Start Date 01/01/2022

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**

Pay Type Sage CSV

Pay Pool Staff from Main Home ⓘ

**Appraisals & Supervisions**

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 configure if you plan to use Coolcare to send out invoices via email. For full setup instructions please check our Email Invoicing guide.

Invoicing Staff **Email Invoicing**

Reply To ⓘ Required  
 Allow home to specify override ⓘ  
training@coolcare4.co.uk

Bcc ⓘ  
 Delegate control to home level

Email Body  
 Delegate control to home level 0/3000

## 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

## 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						
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
Mental Health...	0	0	0	0	0	0