

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

- Navigate to **Care Home – Home Setup**
- Click the **Settings** tab
- Update settings you wish to amend
- Click **Save**

General Rooms Staff Positions Break Deductions **Settings** Lookups ▼

Home Settings Email Invoicing

Staff & Payroll Settings

Holiday Start Date Required
01/04/2022

Geolocation Required
England ▼

Payment Frequency Required
Monthly ▼

Invoice Program Settings

Cost Centre
Sage 50 Department
Sun/Sage 200 Department

Rota/Timesheet Configuration

Snap To Shift Limit Time Required
15 Minutes

Hour Rounding Interval (Not Snapped Only)
15 (0.25 hours) Minutes
When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in and clock-out times to give suitable decimal values when it is not shift snapped.
[Show Examples](#)

☐ All Shift Break At Midnight
☒ Snap To Pre-Set Shift Times
☒ Link Absence To Rota

Budget Tolerances

Under	%	Over	%

The Under and Over Budget Tolerances are a percentage used when checking whether the number of shifts and hours are acceptable vs the budgeted shifts and hours.
[Show Examples](#)

Before Shift Start Required
30 Minutes

After Shift Start Required
5 Minutes

Arrive Late Dock Interval
15 (0.25 hours) Minutes
When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in times to the next minute interval to give suitable decimal values.
[Show Examples](#)

After Shift Ends Required
30 Minutes

Before Shift Ends Required
0 Minutes

Leave Early Dock Interval
15 (0.25 hours) Minutes
When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-out times to the previous minute interval to give suitable decimal values.
[Show Examples](#)

Each of the settings on this page are explained below. There are settings relating to the staff rotas and timesheets, staff payroll, and invoicing.

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.

Rota/Timesheet Configuration

Snap To Shift Limit Time Required

15

Minutes

Hour Rounding Interval (Not Snapped Only)

15 (0.25 hours)

Minutes

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in and clock-out times to give suitable decimal values when it is not shift snapped.

Show Examples

☐ All Shift Break At Midnight

☒ Snap To Pre-Set Shift Times

☐ Link Absence To Rota

Budget Tolerances

Under		%	Over		%

The Under and Over Budget Tolerances are a percentage used when checking whether the number of shifts and hours are acceptable vs the budgeted shifts and hours.

Show Examples

Before Shift Start Required

55

Minutes

After Shift Start Required

5

Minutes

Arrive Late Dock Interval

20 (0.33 hours)

Minutes

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in times to the next minute interval to give suitable decimal values.

Show Examples

After Shift Ends Required

55

Minutes

Before Shift Ends Required

20

Minutes

Leave Early Dock Interval

6 (0.1 hours)

Minutes

When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-out times to the previous minute interval to give suitable decimal values.

Show Examples

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. Please refer to our invoicing guides for more information on invoicing settings.

Sage Settings

Sage Department

5

Sage 200 Cost Centre

20

Sage 200 Department

027

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.

Room Settings

☐ Enable Room Recommended 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 *Use Home Footers* in the system configuration settings.

Invoice Settings

BAC Footer

St George's Care Home
32 St George's Road, Beccles NR34 9YQ

Cheque Footer

Cheque Footer

Standing Order Footer

Bank Address Details
Company Address

Direct Debit Footer

Bank Address Details
Company Address

Cash Footer

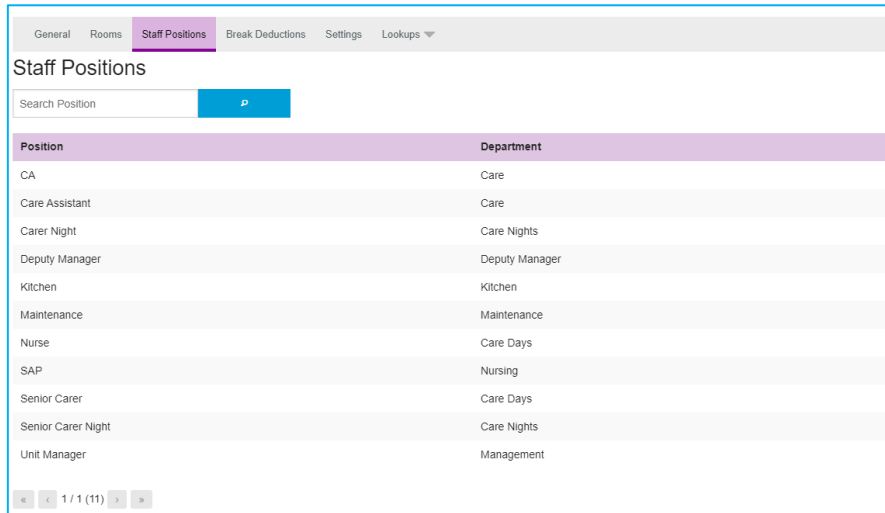
Bank Address Details
Company Address

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 section of the System Configuration guide or the Email Invoicing mini guide for more information.

staff positions

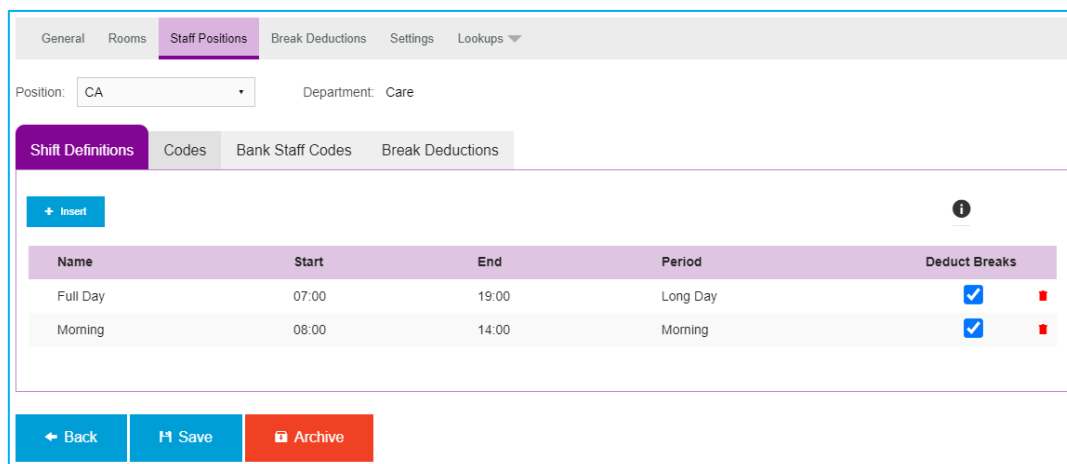
Whilst the Staff Positions are set up at group level there are also some settings that need to be configured for the Positions at Home Level.



Position	Department
CA	Care
Care Assistant	Care
Carer Night	Care Nights
Deputy Manager	Deputy Manager
Kitchen	Kitchen
Maintenance	Maintenance
Nurse	Care Days
SAP	Nursing
Senior Carer	Care Days
Senior Carer Night	Care Nights
Unit Manager	Management

shift definitions

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



Name	Start	End	Period	Deduct Breaks
Full Day	07:00	19:00	Long Day	<input checked="" type="checkbox"/>
Morning	08:00	14:00	Morning	<input checked="" type="checkbox"/>

inserting a shift

- Select a position from the positions list
- It should open on the **Shift Definitions** tab
- Click **+Insert**
- Enter the details required:
 - A shift name, start/end times, day period, and whether the shift deducts breaks
- Click **Save** when completed to create the shift definitions

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 the Statutory Holiday section of this guide.

The screenshot shows the 'Staff Positions' section of the Coolcare system, specifically the 'Codes' tab. At the top, there are navigation tabs: 'General', 'Rooms', 'Staff Positions' (selected), 'Break Deductions', 'Settings', and 'Lookups'. Below these, the 'Position' is set to 'CA' and the 'Department' is 'Care'. The 'Codes' tab is active, showing three sub-sections: 'Shift Definitions', 'Codes' (selected), and 'Bank Staff Codes'. The 'Codes' section contains three groups of input fields: 1. 'Elements which show on the report but not on the CSV file if empty' with fields for 'Standard Hours', 'Booked Holidays', and 'Training'. 2. 'Elements which will show within standard hours on the report and CSV if the element is empty' with fields for 'Bank Holidays', 'Special Day 1' through 'Special Day 4', 'Saturdays', 'Sundays', 'Saturday Holiday', and 'Sunday Holiday'. 3. 'Element which shows separate on the report but are included in standard hours on the CSV when element is empty' with fields for 'Extra Hours' and 'Other Hours'. At the bottom, there are three buttons: 'Back', 'Save', and 'Archive'.

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.

rooms

In order to add resident records to Coolcare, you will need to populate the room list in Home Setup. From here you can also amend room details and deactivate any that are not in use.

General Rooms Staff Positions Break Deductions Settings Lookups ▼			
Rooms			
▼ Filter	+ Insert	Deactivate	
<input type="checkbox"/>	Room Number/Name	Bed	Resident Name
<input type="checkbox"/>	1	A	Mrs Joann Charles
<input type="checkbox"/>	2	A	Mrs Theresa Andrew
<input type="checkbox"/>	3	A	Empty
<input type="checkbox"/>	4	A	Mrs Gail Morse
<input type="checkbox"/>	5	A	Mrs Clara Nielsen
<input type="checkbox"/>	6	A	Mr Arthur Bennett
<input type="checkbox"/>	7	A	Mrs Grace Newman

If you have inserted residents via CSV upload, your room list may be partially populated, but will not include any empty rooms.

adding a new room

- Navigate to **Care Home – Home Setup**
- Select the **Rooms** tab
- Click **+Insert** at the top of the list
- Fill out the **Room Details** page
 - The only required fields are **Name** and **Bed**, all else are optional
- Click **Save** to create the room

New Room

Room Details
Occupancy History

Room Details

Name Required

Bed Required

Notes
0/40

Type
Single

Suite

Date Active

Room Type
Single

Date Inactive

Recommended Weekly Fee
£

Back
Save

making a room inactive

If a room is currently not in use, you can make it inactive in order to stop new residents being admitted into the room:

- Navigate to your room list
- Select the room you wish to make inactive
- Fill the **Date Inactive** field with the date the room will be inactive from
- Click **Save** to make the room inactive

Room Details

Name Required 3	Bed Required A	Notes 0/40
Type Single		
Suite		
Room Type Single	Date Active	
Recommended Weekly Fee £	Date Inactive 11/08/2023	

[← Back](#)
[Delete](#)
[Save](#)

An inactive room will disappear from your room list and show as inactive when adding a new resident to Coolcare, it will also stop counting towards your occupancy.

reactivating a room

Any inactive rooms can be made active again in order to count towards occupancy, you will just have to filter your room list to find it:

- Navigate to your room list
- Click the **Filter** button at the top of the page and select **Inactive**
- Select the room you wish to reactivate from the inactive list
- Remove the date from the **Date Inactive** field
- Click **Save** to make the room active

agement

Filter

+ Insert

Deactivate

All

Active

Inactive

Rooms

Room Number/Name

1

2