

# Users and Permissions in CoolCare

## Manage User Groups

CoolCare allows you to manage the permissions of a group of Users together. Doing so means you can set the rules for the permissions a user has, based on the User Group they belong to. There is no limit on how many User Groups you can create, so you can have as many as you require for a range of users and permissions.

By setting up a User Group, you can assign the level of access the members of that User Group have. You can then manage the permissions of each User Group to determine what they can and cannot see as well as what they can do in CoolCare.

The access to specific homes and User dashboard settings are set on the individual user settings – these can be found in the Manage Users section.

## Full Access User Group

By default, you will have one User Group in Coolcare called Full Access. Full Access users will be able to view and amend every section on CoolCare and will be required to set up new User Groups and new User logins. You cannot amend or delete this User Group. You must ensure that you have at least one user set up with this level of access within your company in case any System Configuration settings need amending or new users need setting up.

## How to Add User Groups

- Click on your name in the top right corner of the screen to access the System Menu.
- Select “Manage User Groups” from the drop-down list.
- Press the “Insert” button to add a new User Group.
- Give your User Group an easy to identify name.
- Tick the appropriate options to give or remove access to CoolCare features for the User Group.
- Click on each available tab and select the permissions you want the User Group to have in that feature.
- Click “Save” once completed.

The screenshot displays the 'User Groups' management page in the CoolCare system. The top navigation bar shows the user 'John Smith' and the location 'Caring East'. The main content area features a table of user groups with columns for 'Name' and a red edit icon. The groups listed are 'Full Access', 'Head Office Staff', 'Carer', 'Payroll', 'StaffBasic', and 'Enquiry'. A sidebar on the right contains a menu with options: 'System Configuration', 'Manage Users', 'Manage User Groups' (highlighted), 'Admin Adjustments', 'Lookups', 'Custom Reports', and 'Logout'. An 'Insert' button is located in the top left of the table area.

## General Tab

In the General Tab, you will select the areas of CoolCare the User Group has access to in CoolCare. Upon ticking each of the boxes, the respective permission tabs will become available on screen for further configuration. You need to access each of the individual tabs to specify permissions for the User Group within these features. If a permission is not selected, the User Group will either not be able to see the section or will be restricted in what they can do within that section of the feature. The options are:

- Head Office User – this grants access to Admin Adjustments, Lookups and Custom Reports, all found on CoolCare's system menu in the top right corner.
- System Configuration – found on the system menu, this gives access to group wide settings for invoicing and staff. This would typically only need accessing by some senior staff.
- Manage Users and User Groups – this gives access to Manage Users and Manage User Groups, meaning the user would be able to create new users and amend user group permissions. We recommend giving this permission only to trusted users, or leaving it for only Full Access users, as it would allow a user to change their own level of access.
- Enable Home/Staff/Resident Section – gives access to their respective sections of the system; this will create their own tabs of permissions to configure separately.

## Care Home Tab

In the Care Home tab, you can configure the User Group access to sections within the Care Home section on CoolCare - including Home Setup, Enquiries, Recruitment, Ledgers, Maintenance, VNB Configuration, Staff Messaging and the Rota Setup. These sections are colour-coded in purple in CoolCare.

You need to select the level of permission you give for each section of the Care Home feature on CoolCare. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View
- Insert/Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section. The only exception to this is the Staff Messaging; this is currently enabled by default for anyone with access to the Care Home section and cannot be changed.

## Staff Tab

This is where you configure the User Group access to sections in the Orange Staff section of CoolCare - including Staff Records, Payroll, Timesheets, Calendar and Rota. These sections are colour-coded in orange in CoolCare.

You need to select the level of permission you give for each section of the Staff feature on CoolCare. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View
- Insert/Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section.

## Residents Tab

In the Residents tab, you can configure the User Group access to sections in the Residents section of CoolCare, including Resident records and Billing. These sections are colour-coded in green in CoolCare.

You need to select the level of permission you give for each section of the Residents feature on CoolCare. This will determine on each section whether the members of this User Group will be able to do the following to records:

- View

- Insert/Edit
- Delete

Unless selected in this tab, the Users in the User Group will not be able access information relating to that section.

## Lookups Tab

In this section, you configure which Lookups the User Group can access. In CoolCare Look-ups are configurable fields which can pre-populate records based on information entered into them.

Look-ups have an impact on all your homes in your group and may affect how data shows in your reports. Before you add permissions to amend look-ups, just have a quick check whether the likely members of this User Group are the right people to have this much influence.

**New User Group**

General Care Home Staff Residents Lookups

Name Required

☒ Head Office User

☒ System Configuration

☒ Manage Users and User Groups ⚠

☒ Enable Home Section

☒ Enable Staff Section

☒ Enable Resident Section

## Manage Users

CoolCare lets you manage the access level of each User through "Manage Users". In this section you can set up individual User logins and specify their User Group for their permissions.

You will need to set up a User Group to set the permission level before you add Users. If you haven't added any User Groups yet, see "Manage User Groups" for assistance.

## Creating a New User

- Click on your name in the top right corner to access the system menu
- Select "Manage Users" from the drop-down list

- Press the “Insert” button
- Fill out all required fields
- In Home Access, select which homes the User should have access to.
- Click “Save” once completed

Users will only be able to see Group or Company level information if they have access to all homes in the Group or Company. If you want the User to see Group or Company level information, make sure you give them access to all the relevant homes.

## Dashboard Widgets

The widgets available within CoolCare displays useful summary information or provides shortcuts to quick tasks to allow the User to perform regular tasks quickly or view important information easily. The widgets are displayed on the first page the User sees when they log on to CoolCare, which we call the Dashboard. The widgets each User is able to see needs to be specified in their User profile.

Select a User from the User list.

- Click the Dashboard Widgets tab.
- Tick the widgets the User should have access to.
- Click “Update Widgets”