

# adding and tracking new enquiries - guide one

You can use CoolCare to add all new enquiries to your home, CoolCare will also track your enquiries through every step of the process. This first guide will show you how to begin adding a new enquiry and tracking its progress with the dashboard and within the reports area. Check our “adding new enquiries next steps guide two for further information.

## adding a new enquiry

When a new enquiry has been submitted to the home you would need to log it on CoolCare, in doing this you will keep an accurate record of how many enquiries the home has received. To insert a new enquiry please follow the below steps.

- Navigate to the **Occupancy Management** section on CoolCare
- Select **+New Enquiry**

This will then open the new enquiry form.

## enquiry step 1/2

The first part of the enquiry is filling out the enquiry details. This has no required fields and you can complete as many or as few fields as you wish. The information you can fill out is split into 3 sections; General, Enquirer Details and Prospective Resident.

### general

The screenshot shows the 'Add Enquiry Step 1/2' form with the 'General' tab selected. The form contains the following fields:

General	
Home Sam's Home	Contact Method Telephone
Taken By Amelia Watson (Staff)	How did they hear about us? Recommendation / Word Of Mouth
Assigned To Sam Reynolds	Permanency
Date of Enquiry 07/09/2022	

This section is for basic information relating to the enquiry; when it was taken, who it was taken by, who it is assigned to, how the contact got in touch and how they heard about the home. You can customise the *How did they hear about us?* dropdown via the Enquiry Sources lookup. See our “adding and amending lookups” guide for information on this.

## enquirer details

Enquirer Details

Title

Mr

First Name(s)

Jordan

Middle Name(s)

Surname(s)

McGuire

Email Address

Landline

Mobile

07230489324

Preferred Contact Method

Mobile

Power of Attorney

Neither / Not-disclosed

Address Search

Enter the Postcode

P

Address 1

Address 2

Address 3

Address 4

Postcode

☐ Enquirer is Prospective Resident

Relationship to Prospective Resident

Son

This is for the details of your enquirer, the person who made the initial contact. The enquirer will become your main point of contact for the enquiry and can also be the prospective resident or a relation.

## prospective resident

Prospective Resident

Title

Mrs

First Name(s)

Edith

Middle Name(s)

Surname(s)

McGuire

Date of Birth

16/11/1945

Age

76

Email Address

Landline

Mobile

Preferred Contact Method

Marital Status

Widowed/Surviving Civil Partner

Address Search

P

Address 1

17 Lakeside Road

Address 2

Address 3

Hetherington

Address 4

Lincolnshire

Postcode

LN14 6OS

Past Occupation

Nationality

Sex

Female

NHS Number

Here you can fill out the details of your prospective resident, who the enquiry is for. There is basic information, contact details, as well as details of their current care and potential funding information. This information is carried over to the new resident record if this enquiry is admitted into the home. There are also additional details you can fill out for any extra contacts the prospective resident may have.

**Please check our “adding new enquiries next steps – guide two” for further enquiry information.**

Fee Information

Funding Type

☐ Deferred

NHS Fee Payer

Local Authority Fee Payer

Additional Information on Prospective Resident

Notes

Contacts

Social Worker Details

First Name

Surname

Doctor Details

First Name

Surname

## tracking enquiries

Now you’ve started the process of adding new enquires to CoolCare there are a few different ways to track the progress of each enquiry and view any important and outstanding tasks that are due or may have been missed.

## enquiry management

In CoolCare you are also able to manage the enquiries you receive and progress them from start to finish, keeping track of each stage of the enquiry process as you go. To get to the Enquiries section follow the below steps:

- Expand the **Care Home** section on the left-hand side
- Select **Occupancy Management**

## enquiries overview

On the occupancy management page, you will see the enquiries overview table, giving you a breakdown of your current enquiries based on their status and how far along in the enquiry process. This overview only counts active enquiries, not inactive or admitted ones.

Total Enq. [Priv.]	Status				Pind adm.	Rsv. paid	Overdue tasks/events	Av. Dys	New enq. (wk)	De-ac. (wk)	WL (U)		WL (A)	
	Act. enq.	WL (U)	WL (A)	On hld							Priv.	All oth.	Priv.	All oth.
2 [0]	2	0	0	3	0	0	1	74	0	0	0	0	0	0

## enquiries list

In the main enquiries list you will see all active enquiries as a default. Their statuses are colour coordinated to indicate if they are overdue or not. If the status is showing as red then it means that there are overdue actions on the enquiry.

To-Do List		Enquiries								
▼ Filter		+ New Enquiry								
Enq. Ref.	Enquirer	Prospect Name	Status	Funding	Care Type	Stay	Started (days)	Assessment	Visit	Admission
18	Mr Jordan McGuire	Mrs Edith McGuire	Active		Regular		07/09/22 (7)		17/09/22	
< Page 1 of 1, 1 rows >										

## CoolCare dashboard

If you have the correct widgets selected for your account (for more information on this check our [users and permission guide](#)) you can view all important tasks for the enquiry process including those that have been missed, due and upcoming.

Occupancy To-Do				Planned Admission (Overdue: 0, Due Today: 0, Due Soon: 1)				
Prospect Name	Task	Due Date	Assigned To	Resident Name	Admission Date	Funding Type	Care Type	Current Residence
Mrs Sarah Kyle	Prepare for Admis...			Sarah Kyle	31/05/2023			
Dr Steve Smith	Visit	30/05/2023	Aneeka Aziz					
Upcoming Enquiry Tasks (Overdue: 0, Due Today: 0, Due Soon: 1)								
Enquirer	Status	Task	Due Date					
Roger Simpson	Active	Visit	01/06/2023					

## enquiry reports

There are a few reports found under Care Home Reports that can analyse your enquiries.

- Expand the **Care Home** section on the left-hand side of CoolCare
- Select **Reports**

# Care Home Reports

Show Descriptions

## Occupancy Reports

Admission and Discharge

Average Occupancy

Occupancy Levels

## Enquiry Reports

Enquiry Contact Details

Enquiry Performance

Full Enquiry Details

## Finance Reports

Income Analysis

## enquiry contact details

This report will print a list of the contact details for all current Enquiries. The contact details are broken down by the contact details of the prospective resident and the enquirer.

## enquiry performance

This report will allow you to assess the time taken to complete enquiries, how many enquiries have been turned into admissions and how many active and inactive enquiries there are as both numbers and a percentage against the overall number of enquiries.

## full enquiry details

This report will export all the details from your enquiries within the selected date range. This includes all active, admitted, deactivated and on hold enquiries that were created within the dates you choose.

## income analysis

This report combines both occupancy and resident fee information to create an overview of the home's income for a month. This report can only be run for a full month once it has passed, it cannot be run for the current month.

## review

Date	Version	Reviewed By	Comments
11/11/2022		Sam Reynolds	
30/05/20223		Maurice Sharp	Original O+E guide split in to three parts