

adding new enquiries next steps – guide two

You can use CoolCare to add all new enquiries to your home, CoolCare will also track your enquiries through every step of your enquiry process. This second guide will focus on the next steps after creating a new enquiry.

enquiry step 2/2

The second step of creating the enquiry is to fill out what has been done already and what next steps are planned for the enquiry. It will ask you for details regarding a brochure, visit and assessment.

Add Enquiry Step 2/2

Brochure
Has a brochure been provided?
☒ Yes ☐ No
When was a brochure provided?
 ⓘ

Visit
Has there been a visit?
☐ Yes ☒ No
Is a visit planned?
☒ Yes ☐ No
When is the visit planned for?
 ⓘ
☐ Exact Date Not Specified
Who will be visiting?
☒ Mrs Edith McGuire (Prospective Resident)
☒ Mr Jordan McGuire (Main Contact)
☐ Others

Assessment
Add Assessment Info?

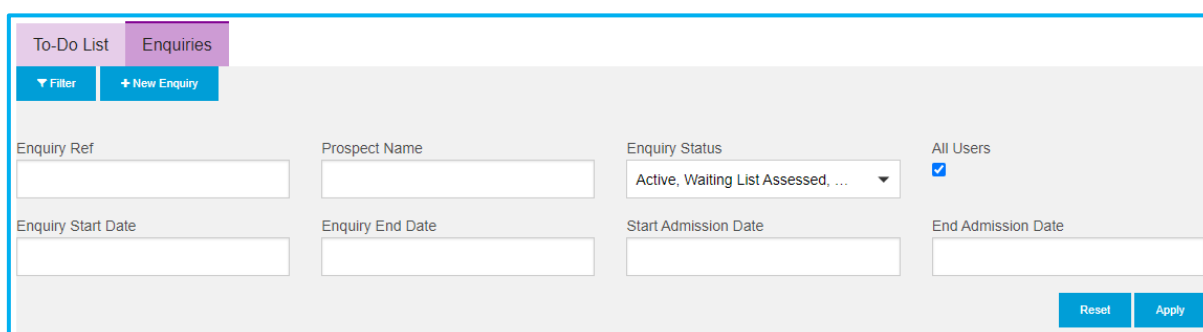
For each section, it will ask you if it has already been completed. If you say Yes, it will then ask when it was completed. If not, it will either ask if it has been planned and when, or why it has not been completed. Fill out everything you can to ensure the enquiry is up to date and what the next steps are.

Once complete, this will create your full enquiry where you can add tasks and update all information within the enquiry. More information on updating and managing tasks are explained in detail later in this guide.

filtering enquiries

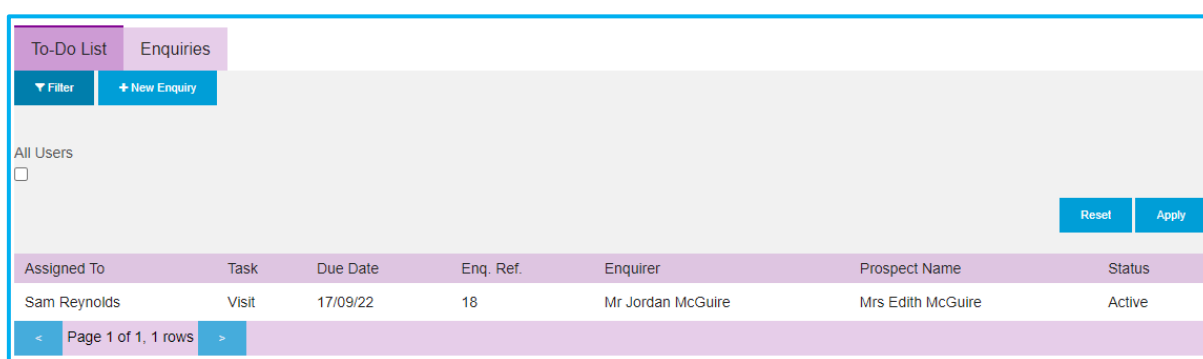
When viewing the enquiries on CoolCare you can filter the view to show you Active, Waiting List Unassessed, Waiting List Assessed, Inactive, On Hold or Admitted enquiries. You can also search for a specific enquiry using their name or their enquiry reference number. On top of that you can filter your results to show enquiries and admissions from enquiries within a date range. To do this follow the steps below:

- Navigate to Occupancy Management
- Click on the Enquiries tab
- Select the Filter button to expand the filter options
- If you are filtering by *Enquiry Ref.* or *Prospect Name* enter them in the boxes
- If you are filtering by the *Start Date* and *End Date* of either the Enquiry or Admission select the dates in the boxes
- If you are filtering by *Enquiry Status*, click on the drop down and tick what statuses you want to show and untick the statuses that you don't want to show
- Select Apply to filter your enquiries



to-do list

The To-Do List will display any outstanding tasks and what their due date is, this is defaulted to show only your outstanding tasks, however you can select to view all outstanding tasks by clicking on the filter and ticking All Users and then applying that.



Assigned To	Task	Due Date	Enq. Ref.	Enquirer	Prospect Name	Status
Sam Reynolds	Visit	17/09/22	18	Mr Jordan McGuire	Mrs Edith McGuire	Active

progressing an enquiry

Once you have completed the initial steps of an enquiry, the full enquiry is created in CoolCare where you can update and progress it through its different stages.

Mrs Edith McGuire Prospective Resident		Enquiry Reference:	18
Contact: Mr Jordan McGuire Son 07230489324			
Funding:		Next Task: Visit	
Permanency:		Date Due: 17/09/2022	
Care Type:	Regular	Overdue Tasks: 0	
		Status: Active	
		Enquiry Started: 07/09/2022 (7 days)	

Enquiry Complete 07/09/2022	Brochure Complete 07/09/2022	Visit Planned 17/09/2022	Assessment	Admission

Date	Assigned
Planned: 17/09/2022	Completed: —
Add Entry	
Visit	17/09/2022 Sam Reynolds

updating an enquiry

- Open the enquiry you wish to update from Occupancy Management
- Select the **View More** button above the enquiry's contact log

Enquiry Details

+

General

+

Prospective Resident

-

Main Contact Details

Title:	Mr	Address 1
First Name(s):	Jordan	Address 2
Middle Name(s):		Address 3
Surname(s)	McGuire	Address 4
Email Address		Postcode
Landline		
Mobile	07230489324	
Relationship	Son	
Preferred Contact Method	Mobile	

-

Contacts

Main Contact

Jordan McGuire

	First Name	Surname	Relation
+	Jordan	McGuire	Son

Add Contact

From this page you can update any of the details relating to the prospective resident or enquirer that were input when you first created the enquiry. You can also add additional contact to the resident and attach any external documents relating to the enquiry and prospective resident. All the information on this page will be transferred to the resident record if this enquiry becomes an admission, and can be updated at any stage of the enquiry.

adding entries to enquiry stages

There are 5 stages to a full enquiry for the different steps of the enquiry process, these are:

- Enquiry
- Brochure
- Visit
- Assessment
- Admission

You can add an entry to any stage of the enquiry at any time; these will either be the event relating to the stage of the enquiry (visit, assessment etc.), additional tasks such as following up with the contact, or any extra notes relating to the different stages of enquiry. To add an entry to an enquiry stage:

- Open the enquiry
- Select the stage you wish to add an entry to
- Select the **Add Entry** button
- Select the option you wish to add to the enquiry

Mrs Edith McGuire | Prospective Resident

Contact: Mr Jordan McGuire | Son | 07230489324

Funding:

Permanency:

Care Type: Regular

Enquiry Reference: 18

Back to Enquiries

View More

Next Task: Visit

Date Due: 17/09/2022

Overdue Tasks: 0

Status: Active

Enquiry Started: 07/09/2022 (7 days)

Enquiry Complete 07/09/2022

Brochure Complete 07/09/2022

Visit Planned 17/09/2022

Assessment

Admission

Planned: 17/09/2022

Completed: -

Add Entry

Date	Assigned
Visit 17/09/2022	Sam Reynolds

Contact Log

Initial Enquiry added by Sam Reynolds on 09/09/2022 at 12:00.

Automatically created Provide Brochure task was completed.

Visit event was created automatically.

Enquiry status changed to 'Active' by Sam Reynolds on 14/09/2022 at 10:59

Visit

Add Entry

Visit

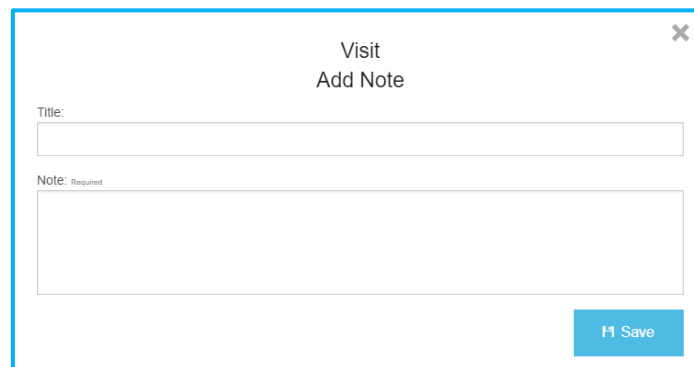
Note

Task

Decline Visit

adding notes

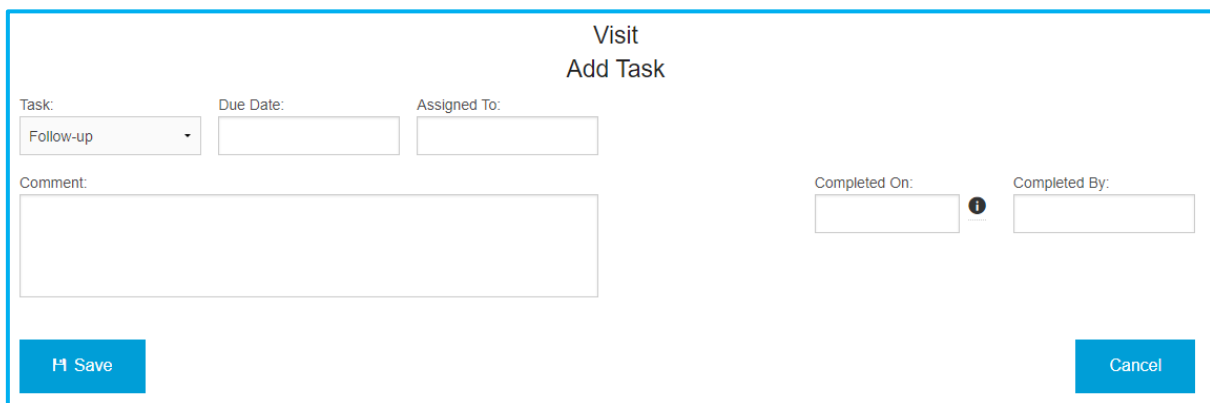
Each step in the Enquiry allows you to add notes to them, these notes when created will show up in the step as a note and are date stamped. They will also display with the title and the body of the note in the contact log along with who entered the note and the date and time it was entered.



The screenshot shows a modal window titled "Visit Add Note" with a close button (X) in the top right corner. Inside the modal, there is a "Title:" label followed by a text input field. Below that is a "Note: Required" label followed by a larger text area. In the bottom right corner of the modal, there is a blue button labeled "Save".

adding tasks

You can add additional tasks to a stage of enquiry, stating what needs to be done, by whom and when. This could range from contacting the enquirer to preparing for assessment. If something requires a due date, it should be added as a task.



The screenshot shows a modal window titled "Visit Add Task". It contains several fields: "Task:" with a dropdown menu showing "Follow-up"; "Due Date:" with a date input field; "Assigned To:" with a text input field; "Comment:" with a large text area; "Completed On:" with a date input field and an information icon (i); and "Completed By:" with a text input field. At the bottom left is a blue "Save" button, and at the bottom right is a blue "Cancel" button.

provide brochure

If a brochure was not provided during creation of the enquiry, you can add a task to ensure this is done and say when it was complete. This works the same as a regular task, requiring you to assign it to somebody and providing a due date.

Brochure

Provide Brochure

Task:
Provide Brochure

Due Date:

Assigned To:
Sam Reynolds

Comment:

Completed On:
07/09/2022

Completed By:
Sam Reynolds (User)

Re-open

Actions:

Date	By	Comments	Complete
Add Action			

Delete
H Save
Cancel

decline brochure

It is possible that a prospective resident may decline a brochure, if this is the case you can select that in the task list. Any *Provide Brochure* tasks will be deleted once the brochure has been declined. To decline a brochure, you must go into the Enquiry and decline this on the Brochure stage.

Brochure Declined

The prospective enquirer has declined this stage of the enquiry.

Decline

add a visit

If a prospective resident has visited or is planning on visiting the care home this can be recorded in CoolCare. If a visit is planned this is very useful for keeping track of all planned visits so you are aware of when each is taking place. This works the same as a regular task, requiring you to assign it to somebody and providing a due date.

Edit Visit

Planned Date:
17/09/2022 Rearrange

Date Completed:

Assigned To:
Sam Reynolds

Title:
Visit

Comment:

Who's visiting?
☒ Mrs Edith McGuire (Prospective Resident)
☒ Mr Jordan McGuire (Enquirer)
☐ Others

Delete
Cancel
H Save

decline visit

Because it is possible that a prospective resident may change their mind about visiting the home after a visit has been booked, you can decline the visit in the Enquiry after a visit has been scheduled in.

Visit Declined

The prospective enquirer has declined this stage of the enquiry.

Decline

add assessment

You can record the details of an assessment in the enquiry to assess the resident's needs and confirm if the home is suitable for them to progress the enquiry. This works the same as a regular task, requiring you to assign it to somebody and providing a due date.

Add Assessment

Planned Date:
20/09/2022

Assigned To:
Sam Reynolds

Comment:

Who's visiting?
☒ Mrs Edith McGuire (Prospective Resident)
☒ Mr Jordan McGuire (Enquirer)
☐ Others

Date Completed:

Location:
On-Site

Cancel

Save

Please Note: Upon completing this task, CoolCare will prompt you to confirm if you can meet the resident's needs, and if not, the reason why.

decline assessment

If a prospective resident has declined an assessment, you cannot realistically know if you can meet their needs. If you select that a prospective resident has declined an assessment then it will deactivate the enquiry.

Assessment Declined

The prospective enquirer has declined this stage of the enquiry. This will deactivate the enquiry.

Deactivate

add admission

You can plan for the resident's admission on the enquiry, selecting the planned date of admission. This works the same as a regular task, requiring you to assign it to somebody and providing a due date. You can also note if the prospective resident has paid a pre-admission reservation fee using the tick box provided.

Add Admission

Planned Date:
30/09/2022

Date Completed:

Assigned To:
Sam Reynolds

☐ Paid for pre-admission reservation

Comment:

Cancel

Save

Please Note: When you create this task, a second task will be created alongside it called *Prepare for Admission* to ensure the room the prospective resident will be entering is ready before their admission. This works like any other task and will require assigning to a user and a due date.

completing admission

Once you add a date completed to the Admission task to confirm the resident has been admitted, you will have the option to **Save & Admit** the resident. This will save the admission and enquiry as complete, and take you to the *New Resident* page in CoolCare's resident section to add in the admission as a new resident record. This will transfer the information from the enquiry details to the new resident record.

New Resident

ADMISSION DETAILS ✓ / RESIDENT DETAILS / OTHER DETAILS

<p>Title <small>Required</small></p> <p>Mrs</p>	<p>Marital Status <small>Required</small></p> <p>-</p>
<p>Forename <small>Required</small></p> <p>Edith</p>	<p>Sex <small>Required</small></p> <p>-</p>
<p>Surname <small>Required</small></p> <p>McGuire</p>	<p>Permanency Type <small>Required</small></p> <p>-</p>
<p>Known As</p> <p></p>	<p>Funding Type <small>Required</small></p> <p>-</p>
<p>NHS Number</p> <p></p>	<p>Care Type <small>Required</small></p> <p>Regular</p>
<p>Date of Birth</p> <p>16/11/1945</p>	<p>Nursing Band</p> <p>High</p>
<p>Age</p> <p>76</p>	<p>Dependency Level</p> <p>1 - Low Risk</p>


enquiry status

In the top right corner of the Enquiry is a status box which tells you what the next task is and when it is due, as well as the status of the Enquiry. If this box is red then it means there is an overdue task or there are no future tasks planned for the enquiry.

Next Task: Visit

Date Due: 17/09/2022

Overdue Tasks: ▲ 0

Status: Active 

Enquiry Started: 07/09/2022 (7 days)

You can also select the pencil icon next to the status to change the status manually, either putting the enquiry *On Hold* temporarily or deactivating it fully. Doing so will remove any incomplete tasks from the enquiry. From here, you are able to re-activate any inactive or on hold enquiries as well.

Enquiry Status Change

Activate

Deactivate

On Hold

This will delete pending or incomplete tasks.

This will delete pending or incomplete tasks.

If you make an enquiry inactive through this, you will also be given the option to add an *Inactive Reason*; a reason why the enquiry was made inactive with a number of options to choose from. Please note this is a set list and **cannot** be customised via Lookups.

Next Task:

Date Due:

Overdue Tasks: ▲ 0

Status: Inactive ✎

Inactive Reason:

-

Enquiry Started:

-

Export

Sam Reynolds on

Chose alternative home

Cost Implications

Location unsuitable

Prospect passed away

Unable to contact

Unable to meet needs

contact log

In the enquiry record every entry that is made on the record is recorded on the Contact Log, this also tracks what time and date and what user was the one who entered the information.

Contact Log

Filter
Export

👤 Initial Enquiry added by **Sam Reynolds** on 19/08/2022 at 10:26.

- Automatically created **Provide Brochure** task was completed.
- Automatically created **Visit** event was completed.
- Automatically created **Assessment** event was completed.

👤 Enquiry status changed to 'Waiting List Assessed' by **Sam Reynolds** on 19/08/2022 at 10:28

Admission added by **Sam Reynolds** on 19/08/2022 at 10:29. Admission planned for 19/08/2022.

- Prepare for Admission task added. Not assigned.

● Prepare for Admission task edited by **Sam Reynolds** on 19/08/2022 at 10:28. Task is assigned to null.

- Prepare for Admission task completed by **Harry Scott** on 19/08/2022

👤 Resident Updated:

- field local authority funding from 'Yes' to 'No'.

changed by **Sam Reynolds** on 19/08/2022 at 10:29.

Admission edited by **Sam Reynolds** on 19/08/2022 at 11:52. Admission planned for 19/08/2022.

- Prepare for Admission task due date changed.
- Admission event completed.
- Enquiry status changed to 'Admitted'

filtering the contact log

Because the Contact Log contains every entry made on the Enquiry there is an ability to filter the Contact Log by the type of activity, what stage it relates to and a date range for when the entry was created.

Contact Log

Filter

Export

Activity Type

- any -

Milestone

- any -

Created - Start Date

Created - End Date

Reset

Apply

exporting contact log

The Contact Log can also be exported out of CoolCare as a CSV file should you need it to be. This creates a spreadsheet with the Log type, entry, date created and user it was created by.

Log Type	Log Entry	Date Created	Created by user
enquiry created	Initial Enquiry added by Sam Reynolds on 19/08/2022 at 10:26.	19/08/2022 00:00	Sam Reynolds
task completed auto	Automatically created Provide Brochure task was completed.	19/08/2022 00:00	Sam Reynolds
event completed auto	Automatically created Visit event was completed.	19/08/2022 00:00	Sam Reynolds
event completed auto	Automatically created Assessment event was completed.	19/08/2022 00:00	Sam Reynolds
enquiry status	Enquiry status changed to 'Waiting List Assessed' by Sam Reynolds on 19/08/2022 at 10:26.	19/08/2022 00:00	Sam Reynolds
event created	Admission added by Sam Reynolds on 19/08/2022 at 10:29. Admission planned for 19/08/2022 at 10:29.	19/08/2022 00:00	Sam Reynolds
task modified	Prepare for Admission task edited by Sam Reynolds on 19/08/2022 at 10:28. Task is assigned to Sam Reynolds.	19/08/2022 00:00	Sam Reynolds
resident updated	Resident Updated: - field local authority funding from 'Yes' to 'No'. changed by Sam Reynolds on 19/08/2022 at 10:28.	19/08/2022 00:00	Sam Reynolds
event modified	Admission edited by Sam Reynolds on 19/08/2022 at 11:52. Admission planned for 19/08/2022 at 11:52.	19/08/2022 00:00	Sam Reynolds

review

Date	Version	Reviewed By	Comments
11/11/2022		Sam Reynolds	
14/04/2023		Sam Reynolds	
30/05/2023		Maurice Sharp	O+E split in to three guides