

adding new enquiries to CoolCare

managing occupancy

CoolCare allows you to manage the Occupancy of your care home within the system and keep track of the types of Occupancy in your care home. This can be done via the Occupancy Management section, or the occupancy reports found later in this guide.

Navigating to Occupancy Management:

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

occupancy overview

The Occupancy Overview breaks down the current occupancy of your home telling you in both figures and percentage how many beds are currently filled. It also provides a breakdown of the residents by their funding type and how many potential discharges have been recorded on the system.

Occupancy Overview									
Occupancy (%)	Private %	Average £	No. Residents by Funding Type						Potential Discharges
			Prv.	LA	LA+T	NHS	Oth.	Unk.	
19 / 20 (95%)	15.79%	721.05	3	0	16	0	0	0	0

enquiry management

In CoolCare you can 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.

Enquiries Overview															
Total Enq. [Priv.]	Status					Plnd 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	Prv.							All oth.	Prv.	All oth.	
2 [0]	2	0	0	3	0	0	1	74	0	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								
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	

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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

Add Enquiry Step 1/2

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 *Getting Set Up* guide for more information on amending lookups.

enquirer details

Enquirer Details

Title: Mr

Address Search: Enter the Postcode

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 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

Address Search: Enter the Postcode

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 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.

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. For more information on monitoring your enquiries and progressing them through the enquiry process, please check our second guide.