

monitoring and progressing enquiries in coolcare.

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

The screenshot shows the 'Enquiries' filter interface. It includes input fields for 'Enquiry Ref', 'Prospect Name', 'Enquiry Start Date', and 'Enquiry End Date'. There is a dropdown for 'Enquiry Status' and a checkbox for 'All Users'. The 'Apply' button is highlighted in blue.

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 clicking **Apply**.

The screenshot shows the 'To-Do List' interface. It includes a table with columns: Assigned To, Task, Due Date, Enq. Ref., Enquirer, Prospect Name, and Status. The 'All Users' checkbox is checked. The 'Apply' button is highlighted in blue.

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
Contact: Mr Jordan McGuire | Son | 07230489324
Enquiry Reference: 18
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:	Completed:	
17/09/2022	-	Add Entry

Date	Assigned
Visit 17/09/2022	Sam Reynolds

Contact Log Filter Export

- 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

From this page you can see which stages of enquiry have already been completed, what is upcoming and yet to be done. Here, you can update the enquiry with any new information you learn about the prospective resident as well as plan and complete tasks and events to progress the enquiry to the point of admission.

updating an enquiry.

You are in contact with an Enquirer and get some updated details you need to be able to update the information in CoolCare. To do this you can open the enquiry on the system and update these details. To open and update an enquiry follow the below steps.

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

This will open the Enquiry Details page:

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

The screenshot shows the Coolcare system interface for an enquiry. At the top, it displays 'Mrs Edith McGuire | Prospective Resident' and 'Enquiry Reference: 18'. Below this, there are tabs for 'Enquiry Complete', 'Brochure Complete', 'Visit Planned', 'Assessment', and 'Admission'. The 'Visit Planned' tab is active, showing a planned date of 17/09/2022. An 'Add Entry' button is visible next to the 'Visit Planned' tab. A modal window titled 'Visit Add Entry' is open, showing four options: 'Visit', 'Note', 'Task', and 'Decline Visit'. The 'Visit' option is selected.

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 form titled 'Visit Add Note'. It has a 'Title:' field and a 'Note: Required' text area. A 'Save' button is located at the bottom right of the form.

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.

Visit
Add Task

Task: Due Date: Assigned To:

Comment:

Completed On: Completed By:

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: Due Date: Assigned To:

Comment:

Completed On: Completed By:

Actions:

Date	By	Comments	Complete
<input type="button" value="Add Action"/>			

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.

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:

Title:

Comment:

Who's visiting?

- Mrs Edith McGuire (Prospective Resident)
- Mr Jordan McGuire (Enquirer)
- Others

Delete Cancel 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:

Date Completed:

Assigned To:

Location:

Comment:

Who's visiting?

- Mrs Edith McGuire (Prospective Resident)
- Mr Jordan McGuire (Enquirer)
- Others

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.

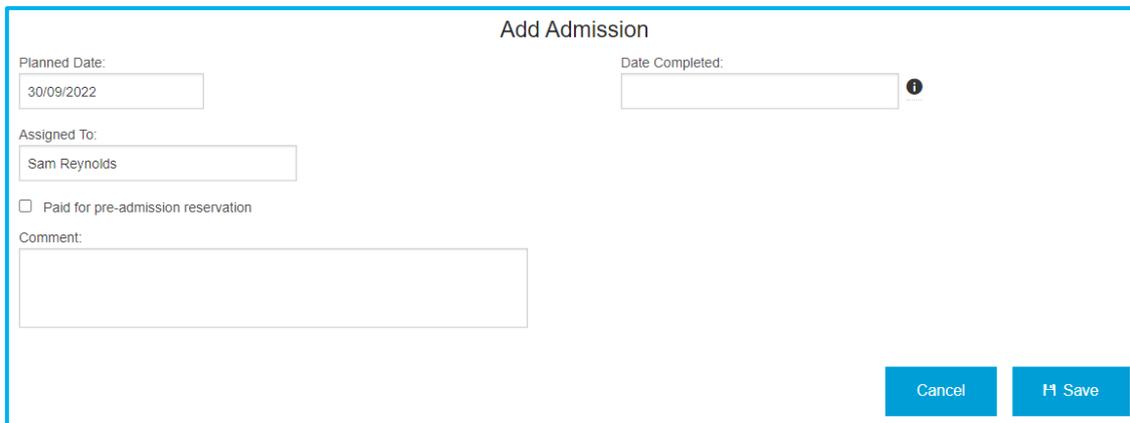
If a prospective resident has declined an assessment, you cannot realistically know if you can meet their needs. If you select that a prospective resident has declined an assessment, then it will deactivate the enquiry.

Assessment Declined

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

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

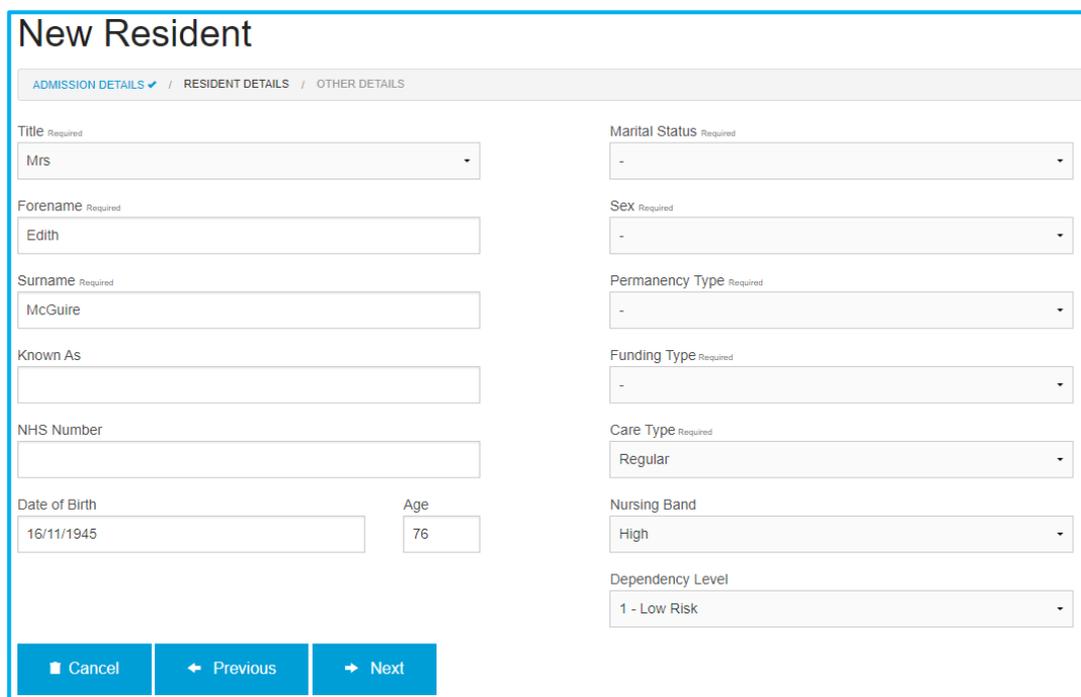
Comment:

Cancel H1 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

Title Required: Mrs

Forename Required: Edith

Surname Required: McGuire

Known As:

NHS Number:

Date of Birth: 16/11/1945

Age: 76

Marital Status Required: -

Sex Required: -

Permanency Type Required: -

Funding Type Required: -

Care Type Required: Regular

Nursing Band: High

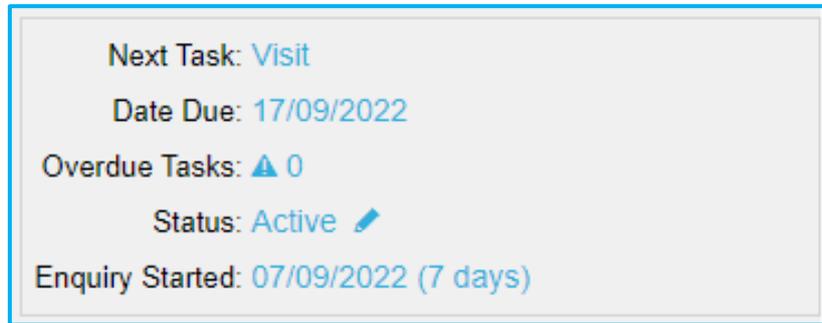
Dependency Level: 1 - Low Risk

Cancel Previous Next

Please Note: When completing an enquiry, ensure you click the **Save & Admit** button to go to the new resident page. Just selecting **Save** will save the enquiry and mark it as complete but not create the new admission as a resident record. You can still access the enquiry once completed by filtering your enquiry list by **Admitted**, where you can find the enquiry, go to the admission task and use **Save & Admit** to add the new admission as a resident record.

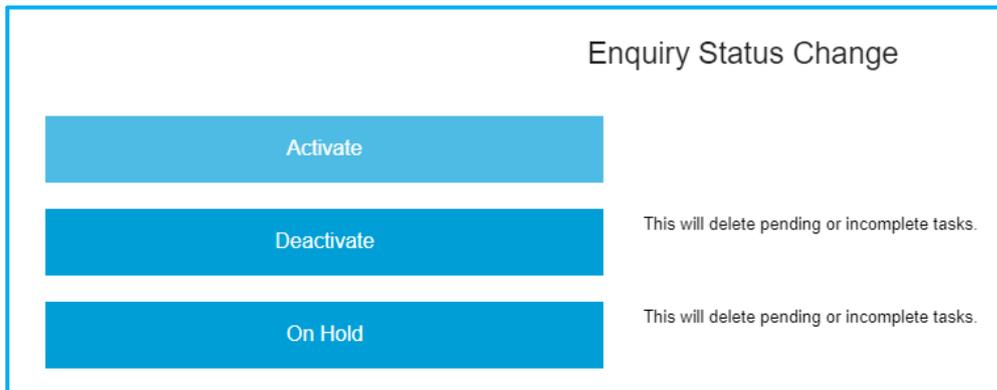
enquiry status.

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.



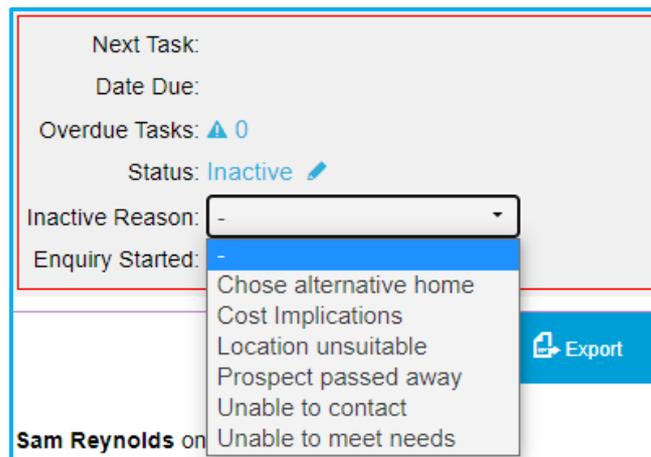
Enquiry Status Change

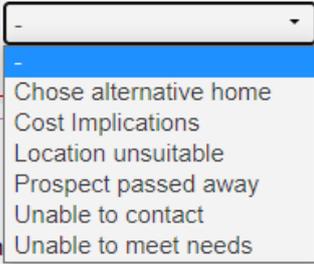
Activate

Deactivate This will delete pending or incomplete tasks.

On Hold 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:

Chose alternative home
Cost Implications
Location unsuitable
Prospect passed away
Unable to contact
Unable to meet needs

Export

Sam Reynolds on

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:	19/08/2022 00:00	Sam Reynolds
event created	Admission added by Sam Reynolds on 19/08/2022 at 10:29. Admission planned for 19/0	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 assi	19/08/2022 00:00	Sam Reynolds
resident updated	Resident Updated: - field local authority funding from 'Yes' to 'No', changed by Sam Re	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/c	19/08/2022 00:00	Sam Reynolds

occupancy & enquiry reports.

There are a number of reports found under Care Home Reports that can analyse both your occupancy and enquiries.

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

The screenshot shows a web interface titled "Care Home Reports". At the top right, there is a button labeled "Show Descriptions". Below the title, the reports are organized into three sections:

- Occupancy Reports**: Contains three buttons: "Admission and Discharge", "Average Occupancy", and "Occupancy Levels".
- Enquiry Reports**: Contains three buttons: "Enquiry Contact Details", "Enquiry Performance", and "Full Enquiry Details".
- Finance Reports**: Contains one button: "Income Analysis".

admission and discharge.

The admission and discharge report allows you to select a date range for a full breakdown of the admissions and discharges within the date range specified. The report will print out as a CSV file, there are multiple tabs along the bottom of the Excel file which give you a breakdown of specific details.

average occupancy.

This report allows you to select a date range for a breakdown of the average occupancy within a period. If you were to select a period of a month the report would breakdown the occupancy weekly for you, if you were to select a period larger than 3 months the report would give you a monthly breakdown of the period. Within the report it specifies the average of beds used and free was, how many slots were used and free and a breakdown of the Fees including a predicted loss due to unoccupied beds. This report prints as a PDF file.

occupancy levels.

This report gives a current view of the occupancy in your care home. It gives you a current breakdown of how many beds are in use and how many beds are in use by each type of fee contract including min, max and average current fees. It also flags up how many residents you have in the home that do not have contracts in place. A graph shows you the increases or decreases in your occupancy across the last 12 weeks.

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.