# tracking occupancy in 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, your dashboard or the occupancy reports found later in this guide.

Navigating to Occupancy Management:
- Click **Care Home**
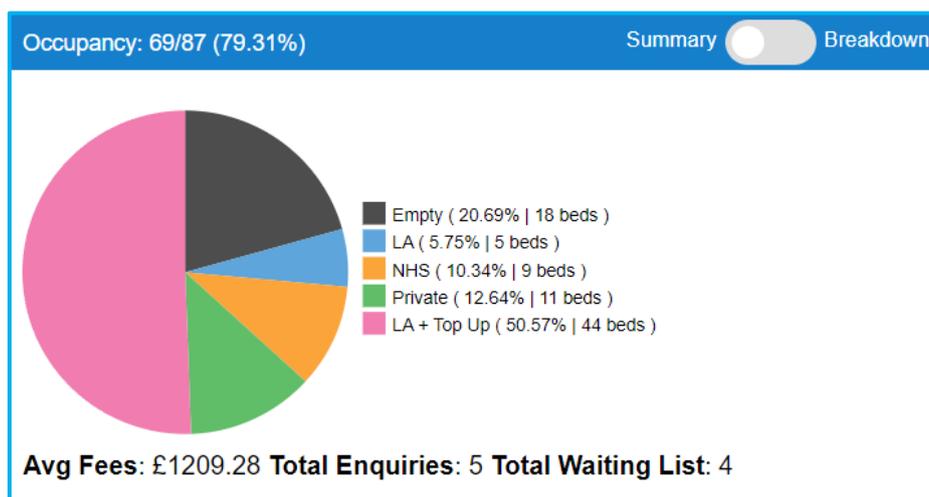- Select **Occupancy Management**

## 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.

**Please Note:** While funding types are a lookup in CoolCare (see our *Adding and Amending Lookups* guide for more information), all funding types will be categorised under one of the six seen below: *Private*, *LA*, *LA + Top up*, *NHS*, *Other* or *Unknown*.

### Occupancy Overview

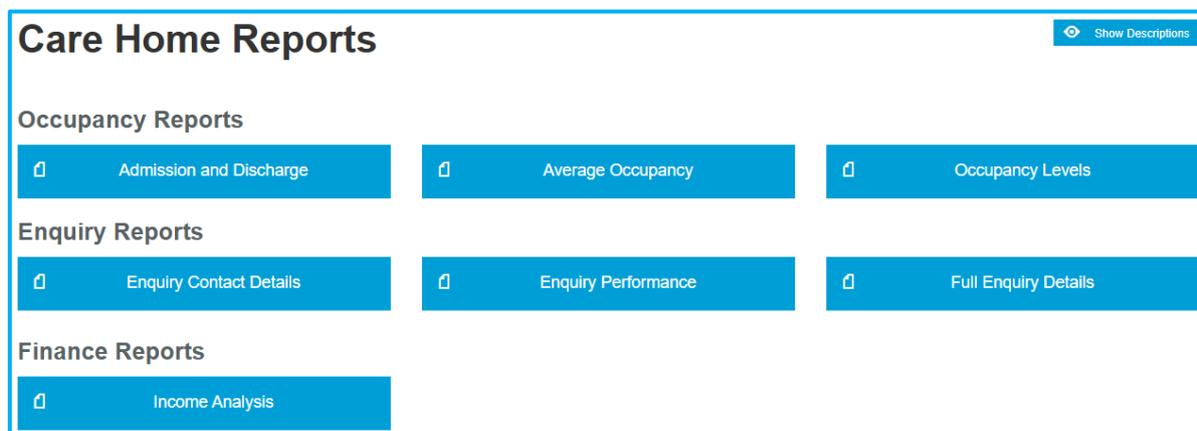| Occupancy (%) | Private % | Average £ | No. Residents by Funding Type | | | | | | Potential Discharges |
|---|---|---|---|---|---|---|---|---|---|
| | | | Prv. | LA | LA+T | NHS | Oth. | Unk. | |
| 19 / 20 (95%) | 10.53% | 812.86 | 4 | 0 | 16 | 1 | 0 | 0 | 0 |

## occupancy dashboard widget.

If you have the occupancy percentage widget selected for your dashboard view (see our *Users & Permissions* guide for more details) you can view your current occupancy levels broken up by funding type, you can also view your average weekly fees among other information. If your account has suitable access, you can also view this widget per home or across multiple at company or group level (You can change your view by using home selection menu at the top right corner of CoolCare). The widget also shows you the average weekly fee of all your residents in the home/group.



Occupancy: 69/87 (79.31%)     Summary ⬤ Breakdown

- Empty ( 20.69% | 18 beds )
- LA ( 5.75% | 5 beds )
- NHS ( 10.34% | 9 beds )
- Private ( 12.64% | 11 beds )
- LA + Top Up ( 50.57% | 44 beds )

**Avg Fees:** £1209.28 **Total Enquiries:** 5 **Total Waiting List:** 4

# occupancy reports.

There are several reports found under care home reports that can analyse your occupancy.
To access the occupancy reports:

- Click **Care Home**
- 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 |
|---|

# 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 increase or decrease in your occupancy across the last 12 weeks.

# 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.