

tracking occupancy on 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:

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

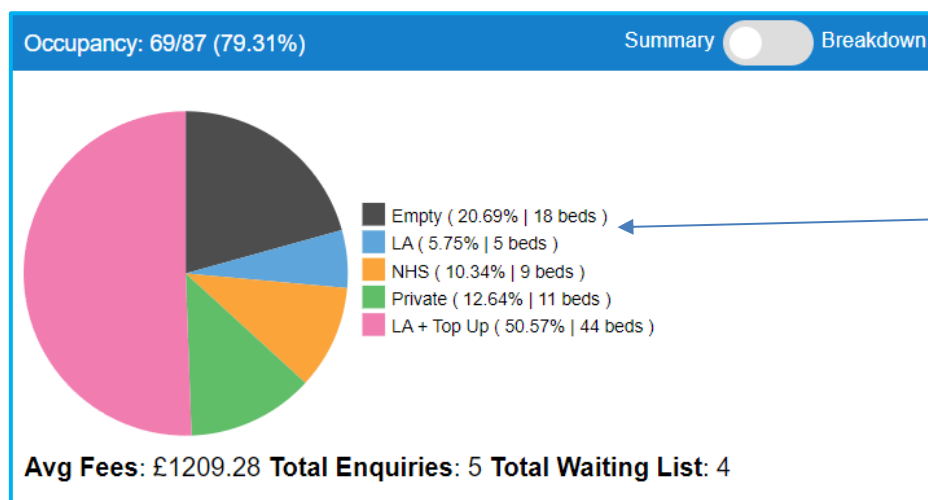
occupancy overview

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
			Priv.	LA	LA+T	NHS	Oth.	Unk.	
19 / 20 (95%)	15.79%	721.05	3	0	16	0	0	0	0

CoolCare dashboard

If you have the occupancy percentage widget selected for your dashboard view (for more information on this check our [users and permission guide](#)) you can view your current occupancy levels broken up by contract 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 the entire business.



The occupancy percentage widget allows you to break down your types of contracts for your entire business or individual homes.

occupancy reports

There are several reports found under care home reports that can analyse your occupancy.

- 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

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.

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 two guides

--	--	--	--