

coolcare FAQ guide.

This guide includes a variety of frequently asked questions on using CoolCare, such as how to use certain functions, what to do in specific situations, or common problems that people may find when using the system. It is split into 4 sections: general queries, care home, staff, and residents. If your question isn't answered here, feel free to contact our support team for more help; either call 0113 385 3853, or email support@coolcare.co.uk for further assistance.

general queries.

can I reset my own password?

This depends on your access to CoolCare. If you have access to the **Manage Users** section of the system, found on the system menu by clicking your name in the top right corner of CoolCare, then yes you can. Select your login from the user list, tick the **Reset Password** button and type a new password into the box that appears, then **Save**. However, if you do not have access to this page, you will not be able to change your password, it would be up to someone within your company that has access to that page to change it for you.

The screenshot shows the CoolCare dashboard for user Sam Reynolds. The main content area displays a 'Welcome Sam Reynolds' message, occupancy status (19/20, 95%), and a pie chart showing bed distribution: Empty (5% | 1 beds), LA - Top Up (80% | 16 beds), NHS (5% | 1 beds), and Private (10% | 2 beds). Below the chart, it shows 'Avg Fees: £947.37 Total Enquiries: 1 Total Waiting List: 1'. A 'Staff On Shift VS Rota' table is also visible, listing staff members like Julia Strong, Amelia Watson, Hilda Connors, and Courtney Wheeler. On the right-hand side, a vertical menu is shown with 'Manage Users' circled in blue.

why does coolcare log me out sometimes?

CoolCare has an automatic logout timer set to **15 minutes** for security purposes, if the system is left idle on one page for this long it will bring up a warning and then log you out of CoolCare. You are given a chance to save a page before it logs you out, so you don't have to worry about losing any work you've done. This logout timer cannot be changed or disabled.

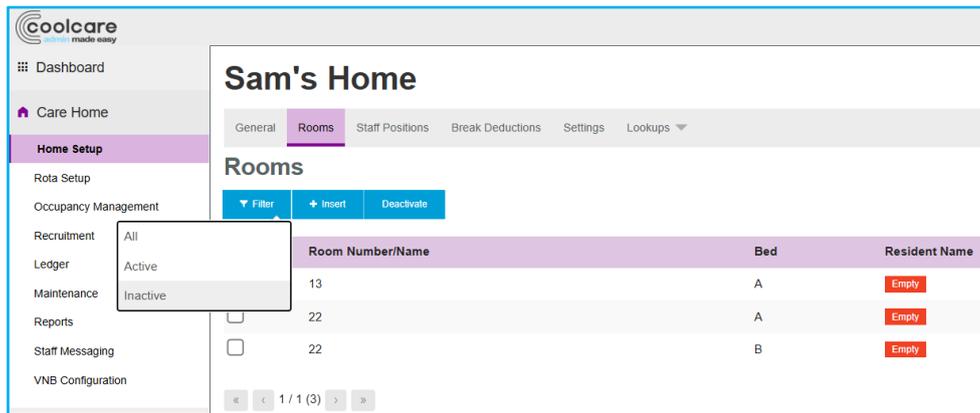
The screenshot shows a warning message box with the title 'Please log in again.' and a close button (X) in the top right corner. The text inside the box reads: 'To keep your work secure, your CoolCare session has timed out. To log back in, please refresh your browser, or click **Login** below. If you were in the middle of typing something, please close this message, copy the text, and then refresh. We apologise for interrupting your flow. Thanks for helping us keep Coolcare secure!' A blue 'Login' button is located in the bottom right corner of the message box.

care home.

why is my occupancy number different to my number of residents?

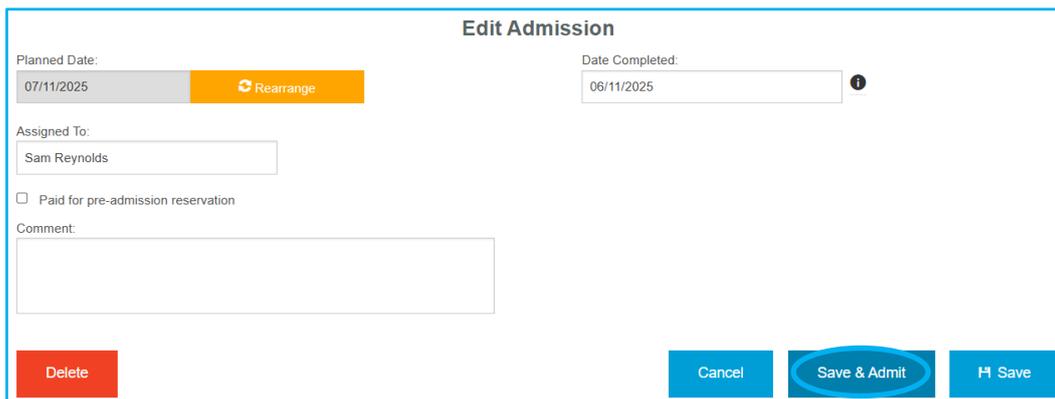
If your occupancy figures don't match with the number of residents you have in CoolCare, this is most likely because you have a resident in an inactive room, which doesn't count towards occupancy. You can correct this by going to **Care**

Home – Home Setup – Rooms and changing the filter to **Inactive**. This will show you any rooms in your home set as inactive, and if you open the room record you can remove the **Date Inactive** to make the room active again.



what do I do if I lose an enquiry when trying to admit them?

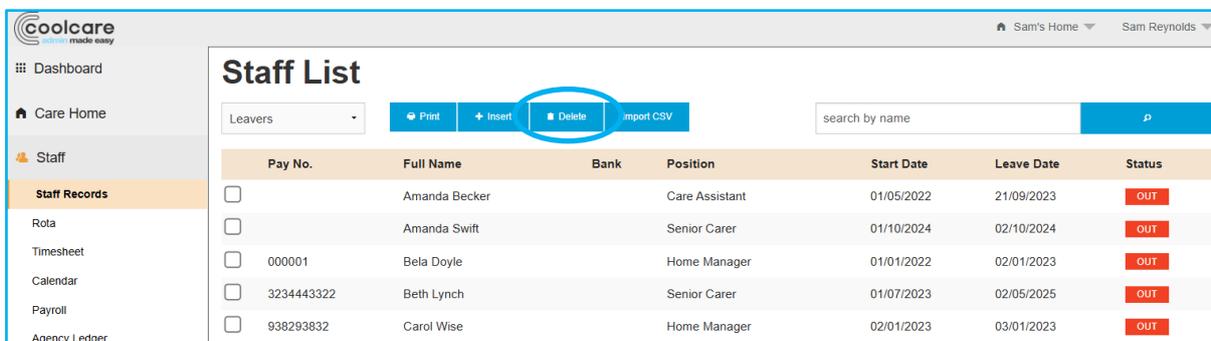
Sometimes an enquiry may get marked as admitted without adding the new admission as a resident record, for example if you save the admission task but don't use **Save & Admit**, or if you leave the new resident page instead of completing it. You can find the admitted enquiry using the **Filter** options on the enquiry list, open the completed admission task, delete it, and add a new admission task. Once you add the date completed, make sure to select **Save & Admit** completing the admission and go to the new resident page to add the admission as a resident record.



staff.

can you delete a staff record?

Yes. Any staff record that has been made a leaver can be deleted from CoolCare. You can make the staff member a leaver on the **H.R. – Positions & History** page of their staff record. Once a leaver, you can filter your staff list to show any leavers, and if you have the right permission, a **Delete** option will be available.



how do I add maternity leave to coolcare?

Maternity leave would be added as an **Absence** on CoolCare. You can add it to the system via the **Calendar**, choosing the dates of absence if you know how long it will be, or setting as a **Continuing Absence** to make it open-ended. Maternity should be one of the **Absence Reasons**, but if not, you can add it to CoolCare through your **Lookups**.

New Absence Record

Allocated Staff Required
Julia Strong

Date Notified

When Required
06/11/2025 00:00 to 06/11/2025 23:59

Reason
Maternity

Continuing Absence
 Self Certified
 Doctors Note

Notes 0/2000

Date	Status	Hours
06/11/2025	Unauthorised	0

Buttons: Save, Cancel

how do I add TOIL to coolcare?

Time off in lieu (TOIL) can be added to CoolCare via the timesheet. You can add hours to the timesheet manually by selecting an empty timesheet entry for the staff member in question, bringing up the timesheet entry box where you can add in the TOIL as standard, extra or other hours, depending on how it would be paid, as well as a note explaining why the hours have been added. As long as the TOIL is on the timesheet, it will be sent to payroll alongside the rest of the hours.

what do I do if a staff leaver returns to the company?

If a previous staff member returns to the company, your best option is to add them as a new staff record rather than trying to reactivate a previous record. This way, you have separate records for separate periods of employment, and don't risk any issues or crossover of data. This will mean the staff member will have a new staff portal login, so ensure they use the right details when signing up for it.

residents.

can you delete a resident record?

Yes. Any discharged resident record can be deleted from CoolCare. You can discharge the resident through **Admission & Discharge – Discharge** on their record. Once discharged, you can filter your resident list to show any discharged records, and if you have the right permission, a **Delete** option will be available.

Resident Records

Discharged [+ Insert] [Delete] [Import CSV]

search by name or invoice unique reference number

Room	Full Name	NHS	Invoice Unique Ref	Admission Date	Discharge Date	Care Type	Funding Type	Weekly Fee	Absence (days)
<input type="checkbox"/>	1 A	Rose Dodson	1718-3880-9226	05/10/2021	27/05/2022	Residential	LA + Top Up	£750.00	
<input type="checkbox"/>	1 A	Adam Rogers	4070-4243-0960	01/02/2023	24/05/2023	Residential	LA + Top Up	£700.00	
<input checked="" type="checkbox"/>	1 A	Joann Charles	8843-6774-0755	30/05/2023	26/11/2023	Residential	LA + Top Up	£800.00	
<input type="checkbox"/>	1 A	Deborah Haley	1745-6676-1780	27/11/2023	29/04/2024	Residential	LA + Top Up	£800.00	

how do you readmit a discharged resident?

If a resident returns to the home, typically with respite residents, you can link them to a previous admission. Create a new resident record, but on the new resident page there will be the option to mark them as a **Readmission**, this will also give you the option to link them to a **Previous Resident**, their old, discharged, record. Linking them together means their details will be re-used, and you'll be able to re-use the same billing details when setting up their Fee Contracts for invoicing. You can then access their previous record from their current one via **Admission & Discharge – Previous Admissions** on their resident record. This page can also be used to link a resident to a previous stay after they have been admitted.

can you delete an invoice?

No, once created an invoice cannot be deleted from CoolCare. What you can do is edit the invoice to remove any details from it, as long as it hasn't been marked as imported. Select the invoice on the **Invoices** page and scroll down to the **Invoice Items** section. From there you can remove the invoice items using the red minus icon on the right-hand side of the list. Alternatively, you can edit the items to have no value or description.

Invoice Items							
Add Invoice Items							
Item	Nominal Code	Qty	Description	VAT Code	Unit Price	Goods	Period
1		1	Residential Care for Rodney Hess in Room 21 at Sam's Home for 31 days, from 01/01/2026 to 31/01/2026	1			01/01/2026 - 01/02/2026
2	5	1	Fees at £200.00 per week	1	£885.71	£885.71	01/01/2026 - 01/02/2026