

coolcare faqs.

implementation and support.

Q: How long does it take to install?

A: *This is led by your needs and preferences for roll-out to your organisation. If we have all the required information from you, CoolCare can set-up your access in a matter of hours so getting your subscription can be as quick as same day! Our implementation team will work with you to understand how best to roll it out to your organisation – whether all homes at once, a phasing of features and/or a phasing of homes. We then tailor the training package to your needs and make sure your team have everything they need in place to start using the software as you go live with it.*

Q: What does installation look like?

A: *Before installation you'll get to meet your customer success manager, training manager and a member of support to discuss your onboarding and setup. It'll give us a chance to understand your business needs and learning outcomes. You'll have a bespoke training agenda that aligns with your goals and one that will support you and your team with your Coolcare implementation. After training you still have a dedicated customer success manager to support you and to check that your post implementation is going to plan.*

Q: Is there support available?

A: *We have a dedicated support team who can be contacted via the CoolCare chat client, phone or email who are here to help you through any questions you may have whilst using the system.*

Q: We are looking to grow our business, can CoolCare support this?

A: *Yes, there is a dedicated project team within CoolCare who manage customer requests for adding or removing sites, merging or splitting databases or changing their company structure.*

Q: We're moving to CoolCare from another software provider, can I transfer all my data across?

A: *We recommend uploading your core resident and staff information to CoolCare, this is quick and will save you lots of time. The training and support teams will be able to assist and advise you if required. As systems all work differently, it is best to build your data to ensure the integrity of what you are working from. If needed Support can upload payrates (for additional cost).*

occupancy management.

Q: How quickly can I convert enquiries into residents?

A: *In the shortest time possible. CoolCare captures all the information you need about your prospective resident so you can tailor and progress the enquiry in line with their needs. Multiple teams can work on the same enquiry so you can make sure you are extremely responsive to requests for admissions and proactively shorten the time between initial enquiry and moving into your home. On average CoolCare customers admit a greater proportion of self-funding residents in around 20 days – reducing time to convert by 5 days over the last couple of years!*

Q: Is it easy to keep track of enquiries?

A: *Yes, the Coolcare dashboard allows you to stay on top of your enquiry tasks by highlighting any missed tasks and any that are due soon. You can also assign tasks to staff during the enquiry process allowing for accountability.*

Q: Why is having my enquiries online better than our current book/diary system

A: *Online enquiry management ensures a clear, high-level visibility of enquiries and at what stage they are up to, CoolCare records funding type, care needed, current situation and reasons for seeking care. Having the record online allows instant reporting and comparisons of time from enquiry to admission, enquiries lost and converted, how they heard about the home etc.*

Q: Do I have to re-enter data when the enquiry becomes admitted as a resident?

A: *No need! As CoolCare is a connected holistic system, when the enquiring resident is due to be admitted the resident data is auto populated into the new resident record. Not only that, if you use Person Centred Software or Nourish as a*

care planning system the resident data will be transferred. This means a new service user will be automatically created in the care planning software and the data core will be auto populated.

Q: How does CoolCare help me manage enquiries?

A: With all the relevant information in one place, CoolCare can assist your admin teams to manage your enquiries through the process – so they are sent brochures and contacted at the right times ensuring that your admission rates versus enquiries received are maximised, making sure you make the most of your marketing and promotional activities.

Q: How easy is it to access important data such as how are my homes performing and current occupancy levels?

A: By setting up the widgets on your dashboard (this only takes seconds) you can instantly see how your homes and business as a whole is performing. The occupancy widget is a very visual interpretation of your data and breaks down your current occupancy, the type of occupancy (private, LA etc) along with average fees. You can also track the percentage of empty beds across your business and check your pipeline for potential new residents.

time and attendance.

Q: Why is digital clocking more efficient than paper-based systems?

A: Put simply: it is automatic and you can trust it. The software automatically captures when your team started work and then compares that to their normal shift patterns to align it. Time is saved by not having to manually write-down when people came in/out but also in the checking you need to do for accuracy.

Your staff can also log in to their staff portal and see their hours, so they are assured that they are being paid correctly, reducing the many payroll queries that care homes receive each month. Aside from the time saved, there are big cost savings too as your payroll will be much more accurate with your team being only being paid for hours genuinely worked.

Q: How easy is it to change the rota?

A: Coolcare has been rostering care staff since 1998. The rotas are based on an overall budget of agreed safe staffing levels set by the care home. The rotas can be set to automatically roll on a reoccurring basis. We recognise that flexibility is paramount in care, as such shifts can be allocated to regular staff or alternatively the shift can be set to have no specific staff member allocated (yet the shift is still needing cover).

Clicking on an unallocated shift displays only staff qualified for the shift and allows managers to request cover from staff, bank staff, staff in other homes (within the group) and set for Agency cover.

Q: How does CoolCare make filling shift cover easy?

A: CoolCare auto creates text messages and sends them to staff to ask if the staff member would be available to cover the specific shift. Staff simply click YES or NO and the rota is updated with the offer. Selecting the staff member for that shift puts them in the rota, sends a text and updates the staff members personal staff portal.

Q: Can Staff see when they are working next?

A: Yes, through their free online staff portal they can see when they are working next, their booked (and rejected) holiday, plus when they have worked, how long they worked, what job roll they did and at which home, thus assisting in pre-payday questions of “did you see my overtime shift” etc.

Q: Can staff request holidays through an App?

A: We have a free staff portal for staff. Rather than using an app (which would require the ownership of a smart phone) CoolCare uses a web page and bookmarking so that it functions like an app but can be accessed on ANY web enabled device. Staff can open the portal, see their holiday allocation and request directly through their device.

Managers receive the request on their CoolCare dashboard, a click on the request shows the calendar for that week/month allowing the manager to make an instant decision to authorise or decline. Staff are notified by text and their portal is updated with either outcome. Coolcare then removes the staff member from the rota (or marks them as being on holiday if not working that day), updates their totals and puts the holiday in the calendar.

Q: Can staff see the rota so they can volunteer to cover shifts?

A: Coolcare has a staff portal which allows staff to see the ‘gaps in the rota’ that they are eligible to cover. They can log in via any web enabled device (such as a smart phone), see the available shifts and volunteer via a CAN COVER button. Managers will see these offers in the rota and can allocate appropriately. Staff will receive a text notification when they are allocated the shift and their own personal calendar will be updated within the staff portal.

finances.

Q: How can CoolCare improve cashflow?

A: *By allowing timely and accurate invoicing through the application of fee contracts that can cater for various local authority and private billing for residents. It can also manage purchase ledgers for residents to help keep things clear and transparent. Through the enquiry function you can also ensure that your pipeline is strong to make sure your occupancy (and accompanied billing) is kept as high as possible.*

Q: Can the invoices made by Coolcare match our company branding?

A: *Coolcare has several customisation options to ensure invoices created by the system match your branding. This includes the layout of the invoice, the information displayed in headers and footers, as well as adding a company logo or using a layout that fits on headed paper.*

Q: How can CoolCare reduce the admin burden of the finance team?

A: *There are several ways CoolCare helps the finance team. A home's invoices can be run with just 3 clicks, automated invoicing and email invoicing reduces hours of work to minutes. Multiple staff members such as Managers, Deputies and Home Admins can be given access to the system using strict access privileges, this allows junior team members to enter data into the system within strict parameters, with selectable options and drop-down menus, staff can enter data that finance knows is correct.*

CoolCare will hold data on individual room recommended weekly fees to help managers keep on track. Fee contribution changes can be updated and back dated with just two parameters. CoolCare automatically calculates credits and debits, CoolCare also links to Person Centred Software or Nourish as a care planning system the resident data will be transferred. This means a new service user will be automatically created in the care planning software and the data core will be auto populated, thus reducing the need to duplicate data.

Q: How can CoolCare help reduce errors?

A: *There are numerous ways. Individual fee contracts are automatically compared against the residents total weekly fee and discrepancies are flagged up, CoolCare Also flags where there are missing contracts and where residents have missing information. Not only that, if you use Person Centred Software or Nourish as a care planning system the resident data will be transferred. This means a new service user will be automatically created in the care planning software and the data core will be auto-populated thus reducing the risk of transcription errors and mistakes.*

Q: Can CoolCare save my home money?

A: *Yes! By being a one stop shop for payroll, invoicing, rostering, occupancy as well as certain admin support functions like maintenance, recruitment, and billable extras, you can keep real time oversight on all the key functions. Our dashboard widgets allow you to spot and resolve any issues as early as possible so that you are billing effectively and paying staff accurately making sure you are always on budget.*

Q: Does CoolCare work alongside my other finance systems?

A: *Yes, depending on your current system. CoolCare can export important payroll data into Sage CSV, ADP, Iris, Money Soft or you can export into pay rates. If you're using CoolCare for invoice management, CoolCare exports into the following programmes Xero, Access Dimensions, Netsuite, Open Accounts, PSF, Sage 2000 Cloud, Sage Intacct, Sage Line 200. Sage Line 50 and Sun.*

Care home administration.

Q: How can CoolCare support my admin team?

A: *By offering useful monitoring dashboards to support all aspects of back-office functions – enquiries, maintenance, staff training, invoicing, residents, and occupancy – which enables real time reporting and the ability to react swiftly and proactively to any issues. This level of oversight and co-ordination is an invaluable contribution to the effective running of a care home.*

Q: How easy is to setup hardware for clocking in and out?

A: *Very simple, your Nomad machine (clock in and out machine) is configured to your business in the CoolCare offices and sent out straight to your home or homes. It can be attached to the wall: we recommend in a location with a strong phone signal and easily accessible for staff. Your trainer will also show you how to assign your iButtons (staff fobs) to staff, this can be done even faster if you have an iButton Reader.*

Q: How can CoolCare reduce the admin burden in the care home?

A: *There are many ways CoolCare helps the admin team. A home's invoices can be run with just 3 clicks, automated invoicing and email invoicing reduces hours of work to minutes. Fee contribution changes can be updated and back dated with just two parameters, saving time and the risk of error. Shift cover request are a simple click and text messages are autogenerated and sent direct from the rota, saving hours per week. Holiday requests are done online and are easy for staff to request.*

Q: Can CoolCare reduce the need to re-enter data into other systems?

A: Yes, time sheets are auto curated and prepared for direct payroll import, saving hours per month. Joiner and leaver data is auto created for upload into payrolls software.

CoolCare also links to Person Centred Software or Nourish as a care planning system the resident data will be transferred. This means a new service use and new staff will be automatically created in the care planning software and the data core will be auto populated. Thus, reducing the need to duplicate data and the risk of transcription errors.

Q: How does CoolCare support me?

A: *We can help you through every stage of the implementation process – we have a strong on-boarding programme which includes access to our training and support teams so that we can make every stage as simple as possible. We understand that adopting new systems can be a challenge for your teams so we do everything we can to make the process as easy as possible. You will have an allocated Account Manager (we call them Customer Success Managers) and our Support team are available on email, by phone and by live chat to answer any questions you may have.*

Q: Can I control access for my staff and protecting sensitive data?

A: Yes, when creating your CoolCare database you will be given one user account which will have access to all areas of the software. During your training we'll show you how to create user groups across your business, making sure each user group has appropriate access permissions. This means your staff will only see data that you want them to see!

Workforce management.

Q: Can CoolCare help me recruit and retain carers?

A: *By tracking applications through our recruitment module in the first instance and then via our time and attendance and rota systems ensuring that they are paid accurately and on time. We offer direct links to several payroll systems and also can allow your teams to access their earnings before payday through Flexearn – another direct link from CoolCare.*

Q: How does CoolCare help with planning and monitoring the workforce

A: *The CoolCare rota monitors your staffing budget to clearly show that you are achieving the correct staffing levels. Where there are small changes to be made to the rota, such as adding extra shifts, staff swapping shifts, split-shifts, changing shift times and assigning cover for absences and holidays as well as bringing in agency cover, the rota has the functionality to easily make these amendments to help you keep up to date. Additionally, the timesheet and calendar clearly show the staff attendance for the week and work with the time and attendance system for real time information.*

Q: How does CoolCare help us to communicate with our staff?

A: *As well as offering a way to openly communicate with staff via our messaging system, CoolCare also offers a staff portal which allows you to offer specific shifts to your team and act on their responses to fill gaps in the rota, as well as allowing staff to submit holiday requests themselves and be notified when they have been accepted.*

Q: Can Coolcare notify my staff of any changes to their schedules?

A: *It can assist in this, allowing you to send SMS messages to your staff directly from Coolcare. Some of these are automated, such as from CoolCare's rota and calendar sending messages when there are changes to shifts or holidays, or you can send customised messages to any number of staff. There's also the staff portal where your staff can interact with Coolcare, such as adding holiday requests to appear on your calendar.*

Q: Can CoolCare help my care staff and workers on the ground?

A: *Definitely, the staff portal is easy to setup and use. This feature allows your staff to see their shifts and request holidays from any location. They can also check any available shifts and request to cover them.*

the benefits for home managers and occupancy managers.

Q: How will CoolCare improve my care homes customer experience?

A: *In so many ways – effective CRM means your prospective residents will feel cared for throughout their enquiry journey. Key information is captured and passed between teams so your enquirer doesn't have to repeat themselves and you can tailor your approach to their needs. What's more, you'll be more organised, given you more time to be proactive and increase your outreach, focusing on the enquiries that need your attention most. The CoolCare virtual notice board also creates a great first impression when your enquirer first walks through the door.*

Q: Can CoolCare help my home managers in their day-to-day role?

A: *Absolutely, having all your care home data in one easy to access but secure location will give help empower your staff. Save time/hours on payroll, invoicing and rota administration allows your team to focus on their people, staff and residents. You can access Coolcare on any device with internet including your mobile device/phone.*

Q: How does Coolcare help occupancy managers?

A: *CoolCare holds enquiry data in an easy to access format using charts and milestones to clearly illustrate how enquiries are progressing, also because it is online the enquiry manager need not be at the home, one manager can cover multiple homes or even a whole group from any location.*

Q: How can the virtual notice board help my care home?

A: *It's very easy to set up and allows staff, residents and visitors to keep up to date with any exciting and important news. You can add your company logo to give your VNB a personal and profession look and customise it to your preference. Information you can easily add include who's in today, any special events and occasions such as birthdays.*

Q: Does CoolCare help eliminate the need for using other systems?

A: *Yes, by running all your home admin from one centralised system using CoolCare will save your home managers time throughout their busy day. Managing enquiries, maintenance, staffing information, payroll and time sheets along with resident invoicing and ledgers can all be done via CoolCare.*

increasing profits.

Q: How can CoolCare help increase profit?

A: *CoolCare is part of a group that owns and operates care homes in a very efficient and very profitable manner, the DNA of CoolCare is focussed on efficiency and profitability. Having your home admin in one location on an easy to access system gives your managers more time to spend on care and managing their home rather than paperwork. Having access to a more accurate time management system allows you to pay your staff the hours they've worked, keeping track of invoices and enquiries through live data means your home is consistently at maximum occupancy and on top of regular payments, maximising revenue in and minimising staff costs all effects the bottom line.*

Q: How does CoolCare improve the sales ledger?

A: *At CoolCare we know that a well-managed enquiry pipeline can allow home managers to reduce the time from enquiry to admittance increasing overall revenue by having the resident join the home earlier, average time from enquiry to admittance is under 20 days on CoolCare. Also, where there is a differential in funding, a strong enquiry pipeline can allow management to be selective in the choice of the next resident, again increasing overall price per bed.*

Q: How does CoolCare help reduce staffing costs?

A: *CoolCare makes managing staff easier by combining rota, timesheets and communications in one simple, easy to use package. By setting the safe staffing budget the home managers can easily see staffing requirements, whether shifts are under or over staffed. Communications via text can be sent directly from the system reducing time taken to ensure safe staffing, combined with a free staff portal, staff can see empty shifts and proactively volunteer for them, this ultimately ensures rotas are filled earlier and quicker reducing the reliance on costly agency.*

Q: How does clocking staff in and out with CoolCare reduce staffing costs?

A: CoolCare uses simple fob technology to log when staff start and finish their shifts, utilising plug and play technology the set-up is easy. CoolCare auto curates' timesheets by applying pay rules and break deductions automatically, both reducing admin time but also ensuring staff are paid exactly to the company rules, i.e.no overpayment. CoolCare can prepare timesheets for approval and allow easy CSV download to pass to payroll, ensuring pay errors are a thing of the past.

Q: Can CoolCare help reduce agency costs?

A: Through CoolCare's rota system you can always make sure you have enough of the correct staff on shift. You can message staff to cover missing shifts to help avoid agency costs. Through CoolCare's agency ledger area you can keep track of the costs and reasons behind agency cover, allowing to stay on top of extra costs throughout the homes and business.