

# CoolCare and Nourish customer guide to integration.

The following guide will take you through setting up your Nourish integration with CoolCare.

## customer first step

Please contact the support team on [support@coolcare4.co.uk](mailto:support@coolcare4.co.uk) as they will need to setup the Nourish integration feature within the database. Once this has been completed, you will receive confirmation and you need to follow the below steps to complete your setup.

## customer next steps

First log into CoolCare, you will see a new tab called integration in the Home Setup menu. To get here click Care Home> Home setup> Integrations.

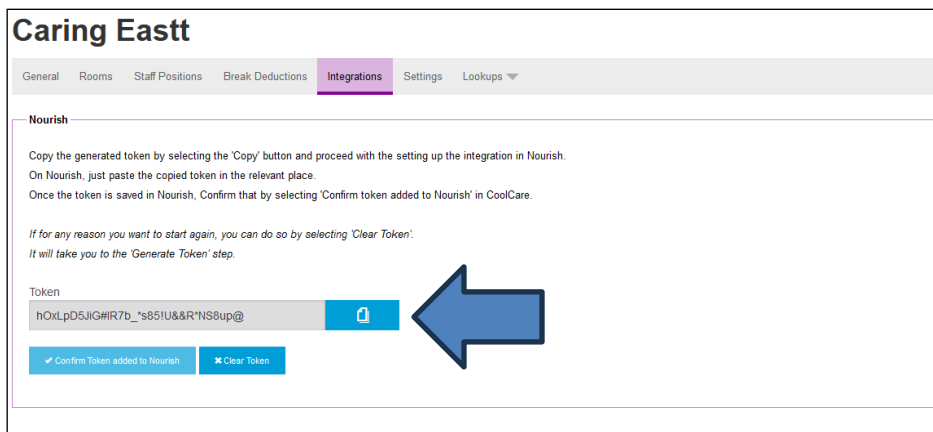
The screenshot shows the CoolCare interface for 'Caring East'. The left sidebar has a 'Home Setup' menu item highlighted with a blue arrow. The top navigation bar has an 'Integrations' tab highlighted with a blue arrow. The main content area shows the 'Home Details' form with fields for Name, Home Prefix, Address, Manager, Telephone, Fax, and Email.

This is where you begin the integration set up. First, you need to generate a token in CoolCare and input this token into your Nourish software.

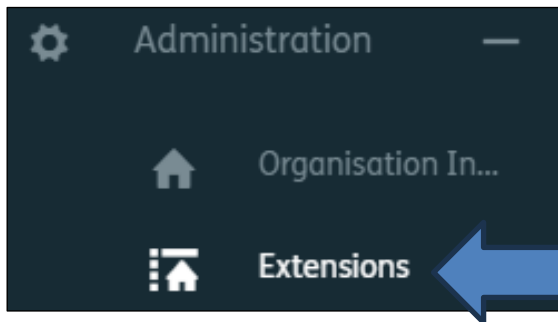
To do this click the "Generate Token" button to produce the token in CoolCare.

The screenshot shows the 'Caring Eastt' Integrations page. The 'Integrations' tab is selected in the top navigation bar. The main content area has a section titled 'Nourish' with the text: 'In order to setup Nourish integration, you will have to obtain a Nourish token. By selecting "Generate Token" the token can be obtained.' A blue arrow points to the 'Generate Token' button.

Once the token is generated, you will need to copy and paste this into Nourish. To do this click the copy button highlighted by the blue arrow below.



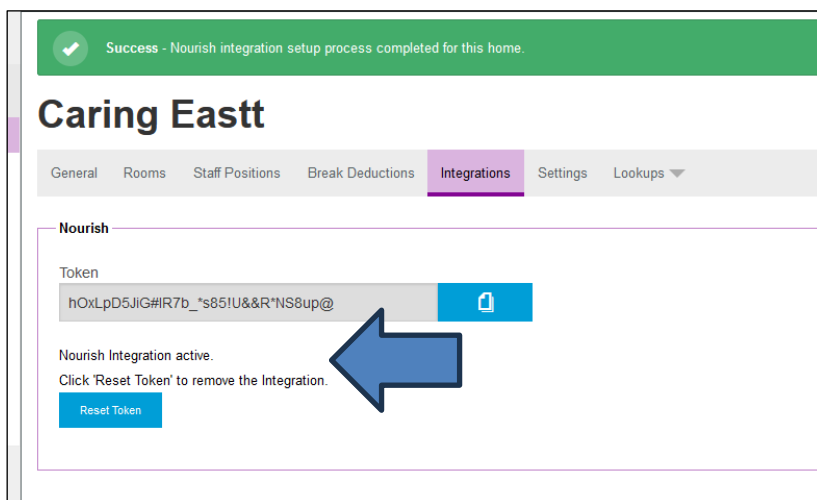
Now go to your Nourish database, in Nourish you will need to complete two important tasks. First you will need to insert the CoolCare token into Nourish. Log into Nourish and click into Administration in the left-hand side menu, then click into Extensions.



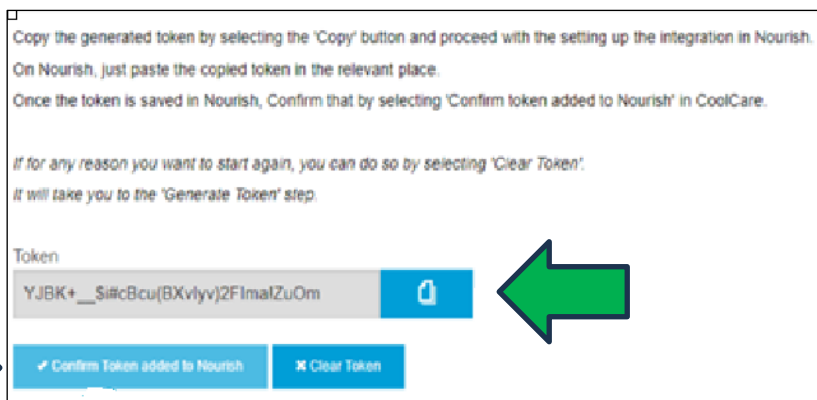
This is where you will find the CoolCare integration. You will need to enable this by moving the toggle so it shows blue, then enable the home. Once this is done paste in the token from CoolCare and save. Finally click the confirm button and this stage is complete.

The second important task to complete whilst logged into Nourish is to create a new position. This position should be called **"CoolCare Starter"**. When a new staff member is sent to Nourish their role will be set to "CoolCare Starter" and their "Job Title" will be set to the name of their current main position in CoolCare. You only need to complete this action one time, once complete you do not need to repeat.

Now you have completed these two tasks the integration should be linked to Nourish, return to CoolCare and check if it has been activated, the integrations screen in CoolCare will look like the picture below.



There is one final step to complete, click on the copy icon (shown by the green arrow below)



Once the copy button has been clicked, you should then be able to click the confirm button shown by the blue arrow. After the confirm button is clicked the integration will be enabled for the home.

## Additional information

Please also check the CoolCare and Nourish integration FAQ guide for more information.

### How does the Integration work?

Once the integration is active, when an administrator or manager adds a new member of staff or a new resident to CoolCare, the profile for that individual will automatically be created and linked within Nourish.

Please note:

- The exchange of information only goes from CoolCare to Nourish.
- Once linked, data updated in CoolCare will automatically be updated within Nourish.
- Data updated in Nourish does not update CoolCare.
- Nourish statuses are updated automatically.
- The staff members or residents can be unlinked.
- There are some caveats, more detail below.

### Adding a member of staff to CoolCare

Adding and archiving a member of staff in CoolCare adds the staff profile in Nourish with the following information. Updating a staff record in CoolCare will update that record in Nourish. CoolCare cannot delete records in Nourish.

- Title
- First and Last Name
- Preferred Name
- Gender
- Status in Organisation
- Marital Status
- Nationality
- Mobile Number
- DOB
- Position
- Address
- Email Address

**Please note:** If you need to edit the email address of a member of staff, please update first in Nourish and then CoolCare. If you update in CoolCare first this will create a duplicate profile in Nourish.

## Adding an enquiry/resident

There are two options for adding residents.

- Adding the potential resident during the enquiry stage, this transfers the data from the CoolCare enquiry to the Nourish **pre assessment pathway.**  
You can now follow the Nourish Pre-assessment workflow as normal.
- Skip the pre-assessment stage or add the person from the CoolCare Resident section, admitting the person in Coolcare with the status of Admitted (future) will add the profile in the **Nourish pathway as Enrolled.**

Where the profile has been set as Admitted, where the date today or in the past, the profile will be updated as **“Onboarding” in Nourish.**

The following information will synchronise from CoolCare into Nourish

- Title
- First Name
- Last Name
- Preferred Name
- DOB
- NHS Number
- Gender
- Status in Organisation
- Marital status
- Nationality
- Mobile Number
- Healthcare Number
- Last Occupation

Updating any of the above information within CoolCare will automatically update Nourish with the new details. Updating Nourish will NOT update CoolCare, the data transfer (and single source of truth) is from CoolCare to Nourish, i.e., Admin system to care planning system.  
Please note the full name and DOB is used to verify for duplication.