

# contract invoicing on CoolCare.

## introduction.

This guide explains how to use CoolCare to bill for one or multiple rooms as part of a larger contract, regardless of if a resident is currently occupying the room or not. You do not put any live resident records in this room, this is purely for Block Beds that are unoccupied at the time.

Create a Room

To start, you will need to create a room for the whole block bed contract. You will need to create a room for each council/contract that you have

- Navigate to **Care Home – Home Setup**
- Select **Rooms**
- Insert a room called **XXX BLOCK BEDS**
- Rename **XXX** to differentiate contracts e.g. *CoolCare BLOCK BEDS for CoolCare Home*
- Enter **A** into the **Bed** field
- Enter a **Date Inactive** from the previous financial year to exclude from occupancy reporting

### Room Details

Name Required	Bed Required	Notes	32/40
<input type="text" value="CoolCare Block Beds"/>	<input type="text" value="A"/>	<input type="text" value="CoolCare block bed contract room"/>	
Type			
<input type="text" value="Single"/>			
Suite			
<input type="text"/>			
Date Active			
<input type="text" value="01/07/2024"/>			
Room Type			
<input type="text" value="Single"/>			
Date Inactive			
<input type="text" value="31/03/2025"/>			
Recommended Weekly Fee			
<input type="text" value="£"/>			

## create a block record.

Next you need to create a resident record, this record will be used to configure and manage billing the block bed contract.

- Navigate to **Residents – Resident Records**
- Select **Insert**
- Enter the start date for billing in the **Admission Date** field.
- Select the block bed room you created for the **Room** field
- Enter the name of the local authority/contract in the resident name fields (e.g. *Leeds City Council*)
- Enter the **Weekly Fee** as the combined total weekly fee for all beds within the contract.
- When all details are filled in, click **Save** to create the record

**Please note:** when you select the room a warning will say that the room is inactive, you can ignore this and proceed to the next page.

## create the fee contract.

Now you have the resident record you can create the fee contracts. There are two ways to manage this element. You can create multiple fee contracts for each room, these will appear as separate invoices or you can create one large fee contract which will mean it generates one invoice. However, when you start to bill the 3rd party for actual residents, they will be separate invoices.

- Open the resident record you have just created
- Navigate to **Billing – Fee Contracts**
- Select **Insert** at the bottom of the page
- Enter the fee contract details. If creating it as a combined contract, ensure the **Weekly Fee Contribution** matches the combined fee
- The contracts start date is the date you will start billing from CoolCare
- Repeat the above steps for additional fee contracts if you prefer separate invoices

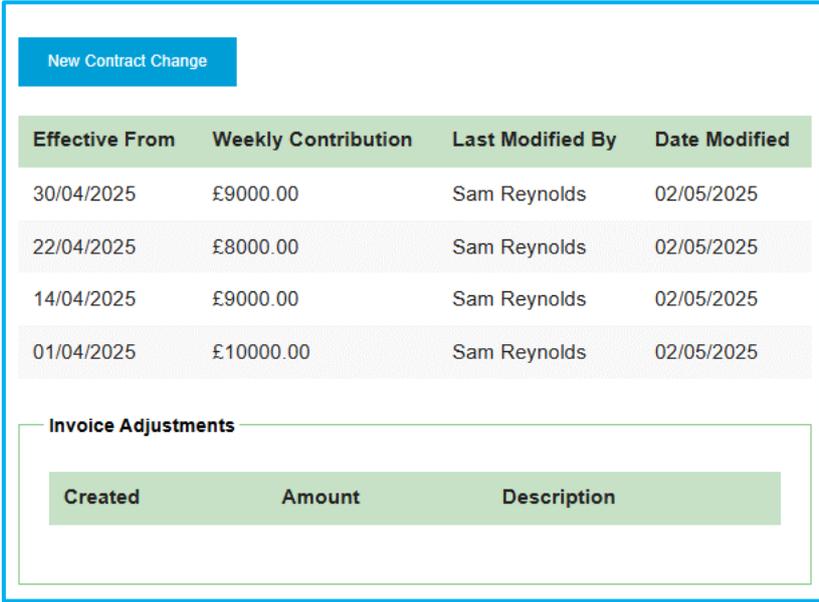
**Please note:** if you're creating multiple accounts for the block bed contracts the **Account Reference** will need to be unique, but our support team can set an override to allow you to download/upload to your financial software as one account.

## managing the fee contract – combined contract.

When a resident occupies or leaves a block contract bed, you will need to setup and manage the billing from the residents record as normal and decrease/increase the billing for that room within the block bed contract previously setup, otherwise you will invoice twice.

To amend the block bed, you will need to enter contribution changes to the fee contracts, to do this:

- Open the fee contract for the block bed contract
- Select the **Contribution Changes** tab
- Select **New Contract Change**
- Enter the **Date Effective** as the admission (or leave) date for the resident
- Enter the new **Weekly Fee Contribution** that will be billed from this contract.



The screenshot shows a 'New Contract Change' interface. At the top, there is a blue button labeled 'New Contract Change'. Below it is a table with four columns: 'Effective From', 'Weekly Contribution', 'Last Modified By', and 'Date Modified'. The table contains four rows of data. Below the table is a section titled 'Invoice Adjustments' which contains a table with three columns: 'Created', 'Amount', and 'Description'.

Effective From	Weekly Contribution	Last Modified By	Date Modified
30/04/2025	£9000.00	Sam Reynolds	02/05/2025
22/04/2025	£8000.00	Sam Reynolds	02/05/2025
14/04/2025	£9000.00	Sam Reynolds	02/05/2025
01/04/2025	£10000.00	Sam Reynolds	02/05/2025

Created	Amount	Description
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**Example:** If you charge £1,000 a week per room and have currently 10 block beds that are empty (£10,000 total) and a resident has come in and occupied one of them you would insert a contribution change with the contribution as £9,000 with the date effective as the admission date of the actual resident, when the resident leaves, you will add a contribution change back to £10,000.

## managing the fee contract – individual contracts.

When a resident occupies or leaves a block contract bed, you will need to setup and manage the billing from the residents record as normal and decrease/increase the billing for that room within the block bed contract previously setup, otherwise you will invoice twice.

When a resident is admitted into a block bedroom:

- Select the fee contract that relates to the bed the resident has occupied
- Change the **Contract End Date** to the day before the resident's admission date

When the resident leaves a block bedroom:

- Select the fee contract that relates to the bed the resident is leaving
- Select the **Contribution Changes** tab and click **New Contract Change**
- Set the **Date Effective** as the resident's admission date
- Set the **Weekly Fee Contribution** to £0.00
- Insert another **New Contract Change**
- Set the **Date Effective** as the resident's discharge date
- Set the **Weekly Fee Contribution** to the amount the contract is to be billed
- Remove the **Contract End Date** from the **General** tab of the fee contract

New Contract Change			
Effective From	Weekly Contribution	Last Modified By	Date Modified
30/04/2025	£0.00	Sam Reynolds	02/05/2025
22/04/2025	£1000.00	Sam Reynolds	02/05/2025
14/04/2025	£0.00	Sam Reynolds	02/05/2025
01/04/2025	£1000.00	Sam Reynolds	02/05/2025

Invoice Adjustments		
Created	Amount	Description

**Please note:** whenever you are making changes to the fee contracts when a bed is filled it's also important to update the weekly fee of the resident record that the Block Bed contracts are held on. This is to prevent warnings of fee contracts not matching the total fees.