

# Coolcare troubleshooting guide

This guide contains several common queries that can arise when using CoolCare, and some suggestions on how to try fixing them before seeking support.

If you require any further clarification on your issue, or any of the recommendations do not work for you, please do not hesitate to get in touch.

## Invoicing queries

### Errors when processing invoices:

If you run into an error when trying to process invoices on Coolcare's *Invoicing* section, this is often because of an error on a resident record, having mismatching admission dates and contract start dates. To identify this, you can either:

- Run the **Residents by Funding** report under **Residents - Reports**, and find where this is the case
- Process your invoices in sections using **Process Selected Invoices**, narrowing down your selection until you find the resident causing the error.

Once identified, you can correct the contract start date, or admission date. See the next point below for some guidance on amending these dates.

### Amending a fee contract's start date:

You may need to do this if you encounter an error when processing invoices and you have identified the erroneous entry:

- Navigate to **Residents – Resident Records**
- Select the resident you wish to update
- Navigate to **Billing - Fee Contracts**
- Select the fee contract you wish to update
- Make a note of the following dates on the fee contract:
  - **Next Invoice Start Date**
  - **Next Invoice End Date**
- Update the **Contract Start Date** and the **Next Invoice Start Date** to reflect the resident's correct admission date and save the record.
- Go back into the fee contract and update the **Next Invoice Start Date** and **Next Invoice End Date** to what they were before the contract was changed to ensure their next invoice is for the correct billing period.

### Editing an invoice:

An invoice can still be edited after being processed in Coolcare; in case a mistake was made that needs to be corrected. To do so:

- Navigate to **Residents - Invoices**
- Select the invoice you wish to amend
- Scroll down the page to the **Invoice Items** section
- Here you can use **Add Invoice Items** to add additional lines to an invoice, or select the existing lines to edit their description and value

**Please note: Once an invoice has been marked as imported, it cannot be edited any further, even if you removed the imported tick (see below).**

## Un-importing invoices:

Once an invoice has been marked as imported on Coolcare, it will stop appearing on the transactions file that is exported from Coolcare. If this was done by accident or you need to re-import and invoice, you can remove the imported tick from the invoice:

- Navigate to **Residents - Invoices**
- Select the invoice you wish to amend
- Select the **Controls** tab within the invoice
- Un-tick the **Date Imported** box
- Click **Save**

The imported tick will be removed from the invoice, and you will then be able to filter by *Waiting to be Imported* and export the invoice.

## Deleting fee contracts:

While fee contracts cannot be deleted from Coolcare outright, there are a few options to stop them contributing to a resident's fees and producing invoices:

- End the fee contract on the day it began:
  - Open the resident record
  - Navigate to **Billing – Fee Contracts**
  - Select the fee contract you wish to end
  - Input the **Contract End Date**
  - Click **Save**
- You can then edit a Contribution Change to make the value of the contract £0 for the single day it was active:
  - Select the **Contribution Changes** tab on the fee contract
  - Select the existing contract fee
  - Update the **Weekly Fee Contribution** to 0
  - Click **Save**
- If the fee contract you created was made incorrectly with a correct version still to create, you can amend the existing incorrect with the correct details you require:
  - Open the resident record
  - Navigate to **Billing – Fee Contracts**
  - Select the fee contract you wish to edit
  - Update the details on the **General, Contribution Changes** and **Account Details** tabs
  - Click **Save**

## Staff Queries

### Error when creating a staff record:

If you encounter an error when trying to create a new staff record, this tends to be because one of the fields you have input is too long for the field's limit. If you encounter this issue, create the staff record by filling in only the required fields. Once created, you can then amend the staff record and fill in the additional details, which will indicate if a field is too long when you try to save it.

### Staff supervisions and appraisals widget not updating:

If your supervisions and appraisals dashboard widget doesn't update after adding a new supervision or appraisal for a staff member, you may need to update the new supervision/appraisal again:

- Navigate to **Staff – Staff Records**
- Select the staff member you wish to amend
- Navigate to **H.R – Appraisals & Supervisions**
- Select the most recent appraisal/supervision (this will be at the bottom of the list)
- Re-select the **Date Complete** and click **Save**

### Correcting missing clocks over 7 days old:

As Coolcare can only add manual clocks within the last 7 days, if you find a staff member has missed a clock over a week ago it will require an additional workaround:

- Navigate to **Staff – Staff Records**
- Select the staff member you wish to amend
- Navigate to **T&A – iButton Settings/Biometric Settings**
- Select **Manually Clock In/Out**
- Add the manual clock as far back as you can (7 days ago, 00:00)
- Navigate to **Staff – Timesheets**
- There will be one timesheet event 7 days ago that clocks out at 00:00, amend the **Standard Hours** to reflect the correct hours of the shift

### Staff unable to log into the staff portal:

If staff members are having trouble logging into the staff portal it may be for a number of reasons:

- Their username or password is incorrect
  - This can be resolved by resetting their portal password via their staff record
- They are using the incorrect link to access the staff portal
  - Your company will have a unique link to access the portal, ensure they are using the correct one

For more details on managing staff portal users and accessing the portal for staff, please check our staff portal guides:

- Admin guide - <https://account.coolcare.co.uk/wp-content/uploads/2019/11/Rebrand-Staff-Portal-administration-user-guide-24-09.pdf>
- Staff user guide - <https://account.coolcare.co.uk/wp-content/uploads/2019/11/Rebrand-Staff-portal-Staff-Guide-24-10.pdf>
- General tips - <https://account.coolcare.co.uk/wp-content/uploads/2023/08/Staff-Portal-Tips-2308.pdf>

### No information showing on staff portal:

If a staff member has accessed their portal but cannot see any shifts on their calendar, this is usually due to the staff member being returning staff that has a leaver record on Coolcare. You will need to access their leaver record, reset its portal password and then give the staff member the portal registration from their new, current staff record. They should then be able to access the portal for their current staff record and see their rota shifts.

# Care Home/Resident Queries

## Unable to change Rota Setup

If you find yourself unable to edit the Rota Setup page, or if the options to edit appear for a moment and then change, you will likely have a future rota applied. A future rota appears when the rota was last changed and applied through the *Apply Changes* button, and the date applied was selected as a future date. This means the rota setup cannot be edited until that future date has passed, or if you choose to *Cancel Future Rota*.

Cancelling a future rota will:

- Revert the applied changes on the rota setup, allowing you to edit it again
- Remove the future rota from the live rota, reverting to the last applied version
  - E.g. If a staff member's shift pattern had changed on the future version, it will revert to the original version

Cancelling a future rota **will not**:

- Revert any manual changes done to the live rota (such as shift swaps, adding/removing extra shifts)
- Undo the changes made to the rota setup before it was applied in the future
  - If you need to fully undo the rota setup, you can use *Reset Draft* after cancelling the future rota

It is always worth checking with any users who may have applied the rota to check who made the change and working out the best course of action. If you are still unsure, our support team would be able to advise further.

## Enquiry admitted without creating resident record

If you complete an enquiry's admission task without using *Save & Admit*, you will not be taken to the new resident page to create a new record. However, you can still return to the enquiry to admit the resident. To find the admitted enquiry:

- Navigate to Care Home – Occupancy Management
- Select the Enquiries tab and click the Filter button
- Select the Enquiry Status filter and tick the Admitted option, then Apply
- Your enquiry list will now include admitted enquiries; select the enquiry you wish to admit as a resident
- Navigate to the Admission task
- Click the **Save & Admit** button on the task

This will then take you to the new resident page to add the new admission as a resident record.

## Occupancy figures do not match current residents

If you find that your occupancy figures on the Occupancy Management page do not match the number of residents you have on the Resident Records page, this will be because one of your rooms is marked as inactive, meaning it does not count towards occupancy numbers but can still contain a resident. To make a room active:

- Navigate to Care Home – Home Setup
- Select the Rooms tab and click the Filter button
- Change the filter to Inactive
- Your room list will now show any inactive rooms; select the room you wish to reactivate
- Remove the **Date Inactive** from the room record and then save

This will reactivate the room, making it count towards your occupancy figures.