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Transforming the way you work

Coldharbour Residential Care

Comprehensive end-to-end software solution providing dedicated income processing and staff cost controls covering a broad range of residential care services

A fully integrated software solution that helps group care providers offer quality personalised care more efficiently

Supporting **5,000 users** on Residential Care system each day

Supply **70%** of **Top 10 UK Residential Care** Groups
* Source Laing & Buisson

70%

Savings of **£3,000 per home, per annum** using **Time & Attendance**

Currently deployed to over 5,000 sites across the UK, the system flexibly addresses the ever increasing sophistication of contracts embraced by care providers such as high-dependency care, dementia care, blended services and the rise of the self-funder. From enquiry and referral management, care and staff planning, through to contracts, time-sheets, billing and pay, Residential Care streamlines, automates and updates processes and information across your organisation.

Our system covers a broad range of residential care services:

▶ **Residential Care**
▶ **Dementia Care**
▶ **Acute and Mental Healthcare**
▶ **Learning Difficulties**
▶ **Extra Care**

▶ **Supported Living**
▶ **Secure Care**
▶ **Complex Needs**
▶ **Specialist Education**

Supporting 5,000 users on our Residential Care product suite every day, within many different market configurations, care organisations benefit from the systems' centralised business rules, management of cost projection, budgetary control, hours and cost analysis and workforce utilisation.

A complete solution
Our Residential care system has been developed over the last 30 years and is the cornerstone of solutions for the majority of private and independent group care providers in the UK, covering;

▶ Income Processing
▶ Resident Records
▶ Cost Control
▶ Staff Planning
▶ Resident Personal Allowances
▶ Staff Hours

▶ Enquiries
▶ Credit Control
▶ Contract Billing
▶ Staff Records
▶ Direct Debit Collection
▶ Cost Budgeting

The benefits

▶ Full automation of complex income processing requirements, client administration and billing.

▶ Comprehensive enquiry management.

▶ Sophisticated and flexible business reporting with complete integration with Coldharbour Data Analytics module.

▶ Staff cost control option, including biometric Time and Attendance solution.

▶ Complete integration with Coldharbour e-Compliance module.

▶ Direct integration with Coldharbour Bank & Agency module.

▶ Seamless integration into transactional interfaces to third party accounting and payroll solutions.

▶ Direct integration with Coldharbour e-Invoicing NHS SBS via Tradeshift module

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Overview of the capabilities and benefits of Residential Care

Residential Care Income Processing

▶ **Client Details/Resident Records -** key information on client or resident records is held covering personal information, next of kin, contacts, personal allowances, bank lodgement occupancy budgets, admissions and discharges. A resident's diary is also available which allows time related information/events to be recorded and reported upon. In addition, other key features include, resident transfers, complaints recording/monitoring and accidents/incidents reporting.

▶ **Enquiry Management -** the system can be used to produce KPI reporting on conversion ratios.

▶ **Debt Management -** business rules relating to the type of care, charge calculations and specific permutations of calendar are established allowing full automation of the most challenging income processing requirements. Within the admissions and discharges section, occupancy information drives the billing engine within Income Processing.

▶ **Contract Billing -** this module covers the provision of specialist care services and contract and void bed arrangements that have become an increasingly important area of today's multi-disciplined care service organisations. The complex business rules relating to flexible and variable rate contracts tied to resident and bed care categories are all handled within the standard functionality of this module.

▶ **Invoicing/Tradeshift -** direct integration with Coldharbour e-Invoicing NHS SBS via Tradeshift, enables invoices to be raised for specific funders and sent directly to the Tradeshift service. The Tradeshift document details screen, displays the invoice details, invoice line information, the details of the fund source, details of the Income Processing site and the current status of the batch.

▶ **Receipts Processing -** comprehensively handles the major types of payments residential care providers receive, such as standing orders, direct debits, block receipts, contract bed payments and single payments.

▶ **Direct Debits/Electronic Banking -** upon completion of invoicing a direct debit batch is created. The direct debit utility then creates a BACS file, with the transactions being submitted to the bank. Receipts from the banking software are downloaded into Income Processing and then allocated automatically to the resident's funding account/s against the relevant invoice. Electronic banking allows a spreadsheet to be set up to import receipts and adjustments into Income Processing against the appropriate funding account.

▶ **Internal or External Sales Ledger -** monies posted can be processed directly via the Internal Sales Ledger within the product. The Internal Sales Ledger includes a comprehensive range of aged debt and period fees reports, statements for funders, nominal income analysis, receipts posting/enquiries, receipts processing routines, and debt management.

Alternatively, clients can interface to our corporate accounting solution, Coldharbour Financials, developed specifically for the care industry. Clients wishing to utilise existing accounting systems are assured that over the last thirty years we have developed interfaces to the majority of mainstream accounting solutions.

▶ **Corporate Accounting -** all invoicing and supporting documentation is customisable. Contract specific formats as well as gross pay information can be generated automatically.

Data Analytics solution

Sophisticated and flexible management dashboards enable users to compare trends, analyse costs and revenues, interrogate statistics, view budgets and create accurate forecasts. The solution is fully integrated with Residential Care to provide interactive and dynamic dashboards and analytics, all accessible on mobile devices. Key reports include occupancy, budgeted occupancy, enquiries, enquiry sources and target fees.

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Overview of the capabilities and benefits of Residential Care

Residential Care Staff Roster

▶ **Global Employee Database -** holds central employee data, contact details, job grade information, contracted hours and specific business rules for calculations of employee pay rates, specific payroll and business rules. This also provides a group care provider with centralised data for HR, training and qualifications. For many of our largest clients this product has removed the need for a dedicated HR and personnel product.

▶ **Global System Manager -** allows information to be centrally managed and shared across all homes and ensures continuity, particularly for reporting purposes. Functionality includes, user access levels, look up lists, global funders, global billing profiles, global billing calendars, admission types, budget analysis and analysis groups, fee addition codes and scheduling.

▶ **Staff Roster Hours Entry -** staffing ladders and business rules are held centrally, the product allows end users to simply verify hours worked weekly, facilitating on-screen budget, per unit, prior to payroll. Local homes verify hours on a central data set with budgets flexed to occupancy visible at the local level, empowering home staff with pre-payroll staff costs. The system will allow automated cut off for hours processing to interface to payroll removing inaccuracies and adjustments in hours worked.

▶ **Staff Roster Shift Input -** has a single objective; to be able to capture the details of each shift worked by each member of staff. The business rules concerning how the varied shifts and exceptions are translated into pay (or deductions) is encoded within the system. The user is not expected to have to make any 'decision' about pay, keeping the operation of Shift Input simple.

▶ **Staff Roster Allocation -** provides a preplanning and working roster solution set for the daily control of staff costs. Working on the basis of a planned rota and the recording of exceptions and changes, the rostering product mirrors the activity on both roster planning and daily operation within a care establishment.

The system utilises an intuitive visual wall chart layout with drag and drop functionality. The allocation product is able to pre cost rosters prior to working periods. Staffing ladders are dynamically linked to occupancy related budgets in grade, hours and cost to provide highly accurate occupancy driven.

▶ **Payroll Interfaces -** with regards to pay and bill, the system can generate electronic outputs and transactional interfaces to third party accounting and payroll solutions, removing the need to key information into payroll systems.

▶ **Bank and Agency module -** innovative automation engine which allows you to optimise the use of staff, whether regular, bank, or agency and, as a consequence, dramatically reduce agency costs. Fulfil shift opportunities via SMS, smartphone or tablet application and seamlessly share information with direct integration to Coldharbour Residential Staff Roster system.

e-Compliance solution

This solution integrates directly with Residential Care and allows customers to quickly achieve company wide, real time visibility of incidents, accidents, complaints or any other areas where the flexibility of e-Compliance is deployed. Across the organisation forms and data capture can be made standard, auditable and reportable. Define your own forms, workflow, validation, alerts, document hierarchy and reporting.

Time and Attendance solution

Our Intelligent touch screen and integrated biometric workforce management solution functions together with our Staff Cost Control applications, forming a fully integrated workforce management and scheduling software solution. The system is mapped back to a rules engine to ensure the current payment and deduction rules are applied.