Managing Staff Records

Contents

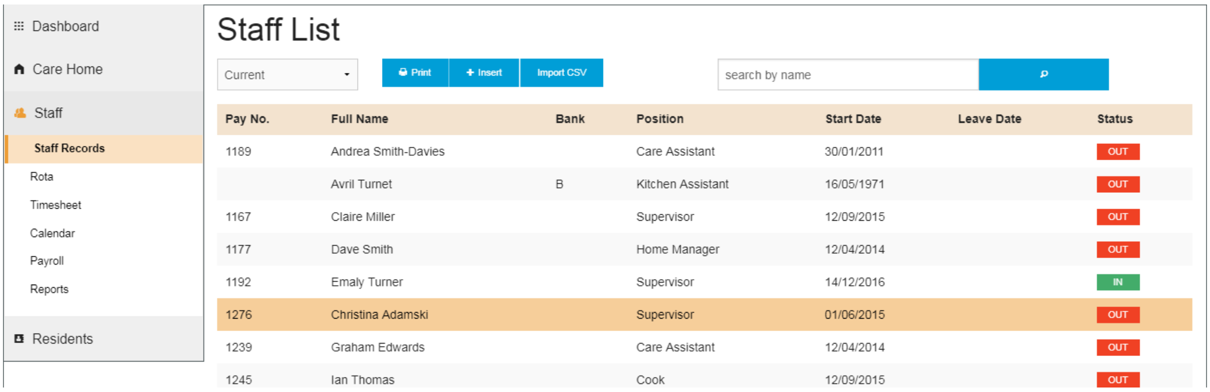
Managing Staff Records

The Staff Records section is where you find and record staff details on CoolCare4. As well as current staff member's records you can also access the records for any leavers should you require it. Within the Staff File you can record various types of data which we will cover in this guide.

Navigating to Staff Records

To get to the Staff Records section please follow the below steps:

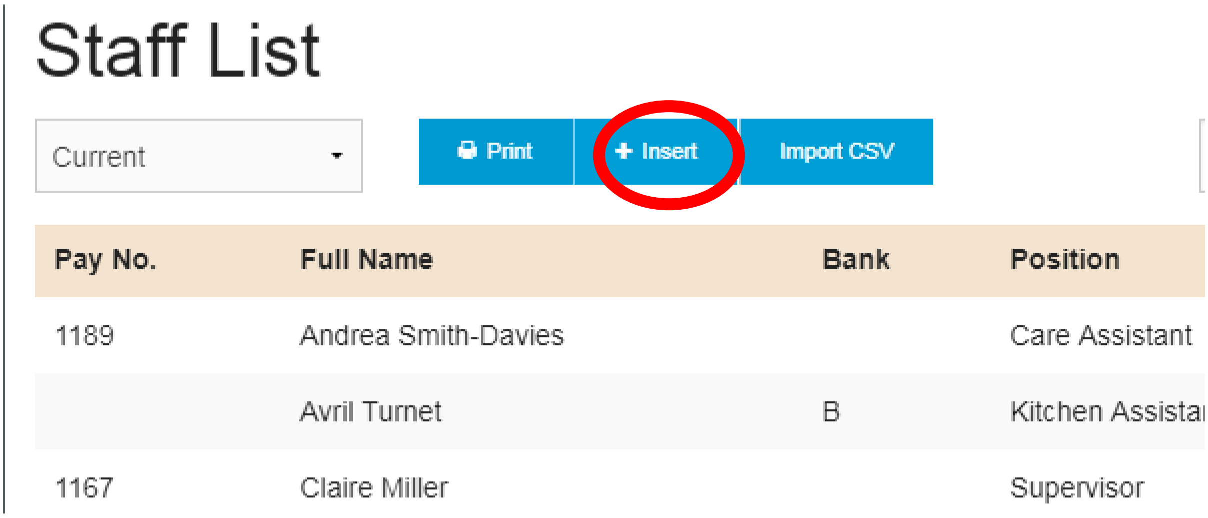
- Once you have logged into CoolCare4 click on the Staff button on the left-hand side of the screen.
- Then click Staff Records.

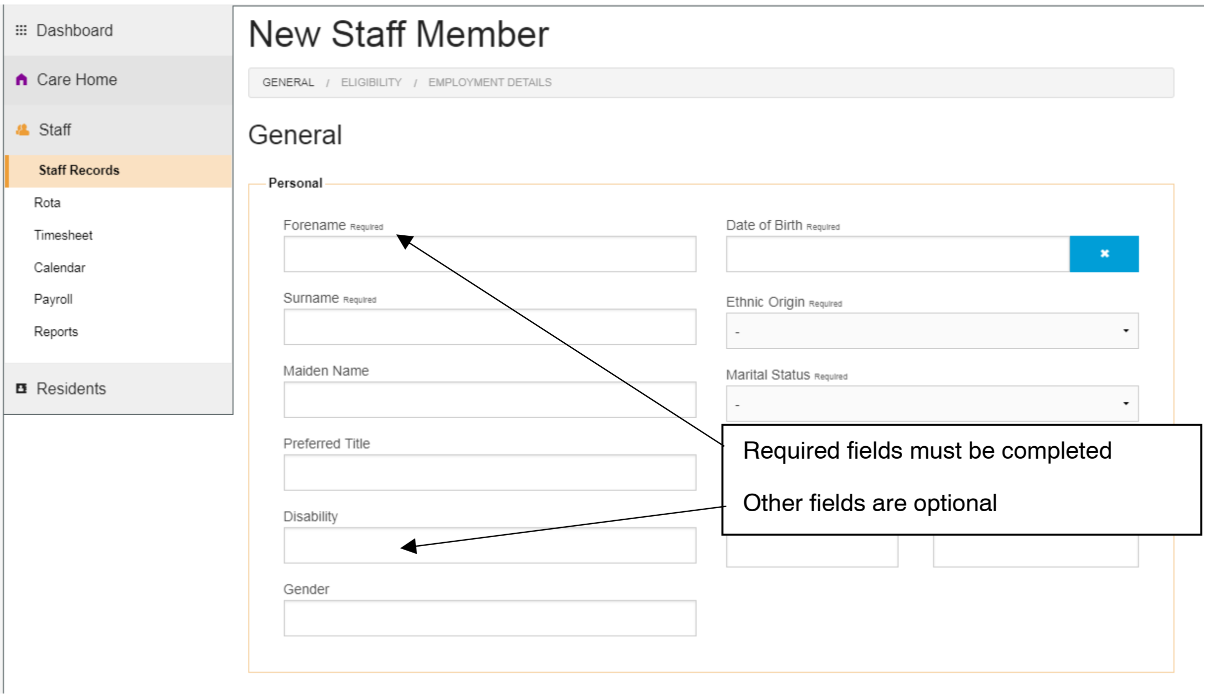


New Starters

Processing New Starters

- Navigate to Staff Records
- Click Insert
- Fill in the General page and click next
- Fill out the Eligibility page and click next
- Fill out the Employment Details page and click Save.
- If you need to go back at any time you can click the Previous button.





Uploading Staff Photo

- Find the staff member in the Staff Records section.
- You can either scroll through the list or use the search by name box.
- Click Upload Photo.
- Navigate to where the photo you are trying to upload is stored on the computer.
- Select the photo and click Open, the photo will be uploaded to the record.
- If you need to update the photo you can click Change Photo at any time.

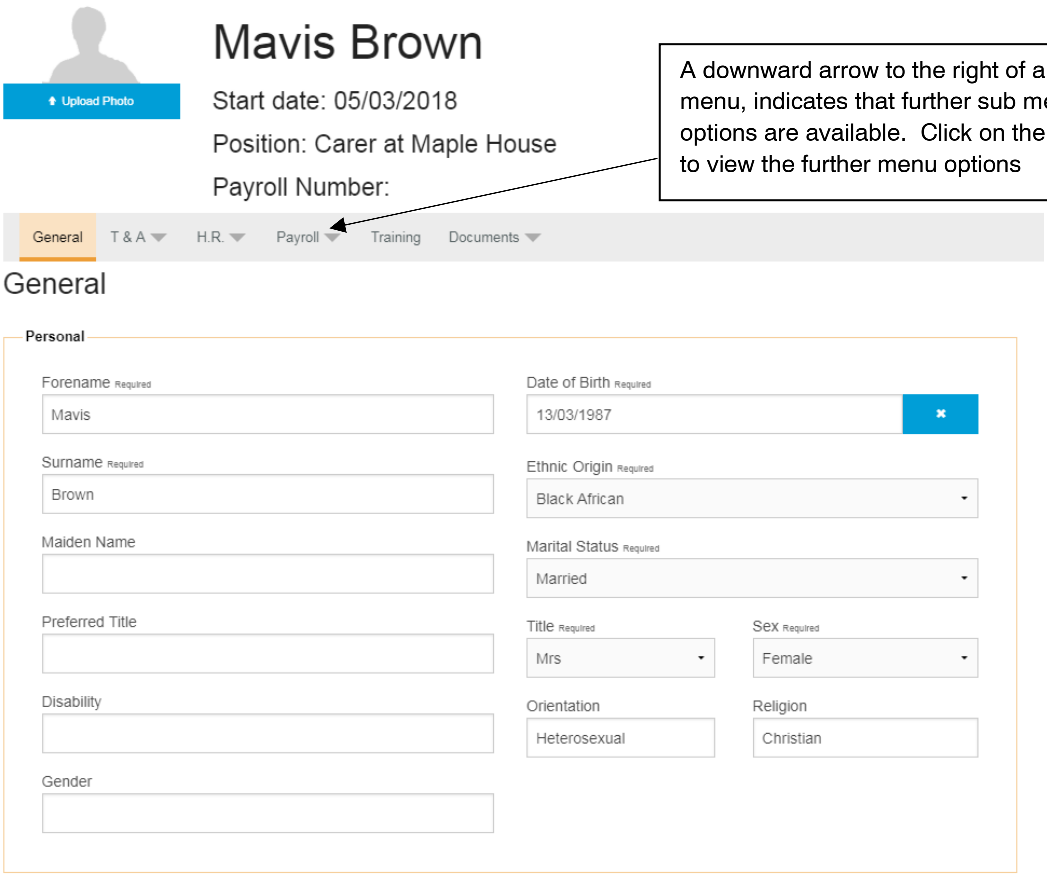
Please note: The photo must be a .jpg or .jpeg file.

Staff Details

The Staff Details are stored in the General page of the Staff Record. This is the first page that you see when opening a staff member’s file. This contains their Personal details such as their name and date of birth and their Address Details.

- Navigate to the Staff Records
- Find the staff member’s record.
- Click on the employee name to open their full record
- Once you open the Staff File this section is the first page that opens.

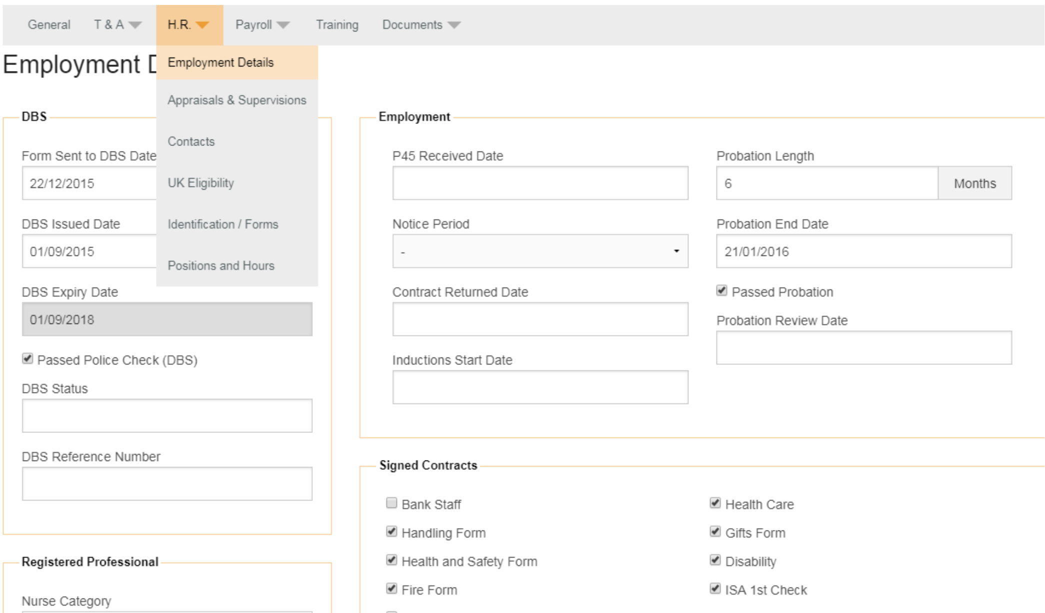
A downward arrow to the right of a menu, indicates that further sub menu options are available. Click on the arrow to view the further menu options



Employment Details

This section is used for storing information related to their employment not exclusive to and including what contracts they have signed and details regarding their DBS checks.

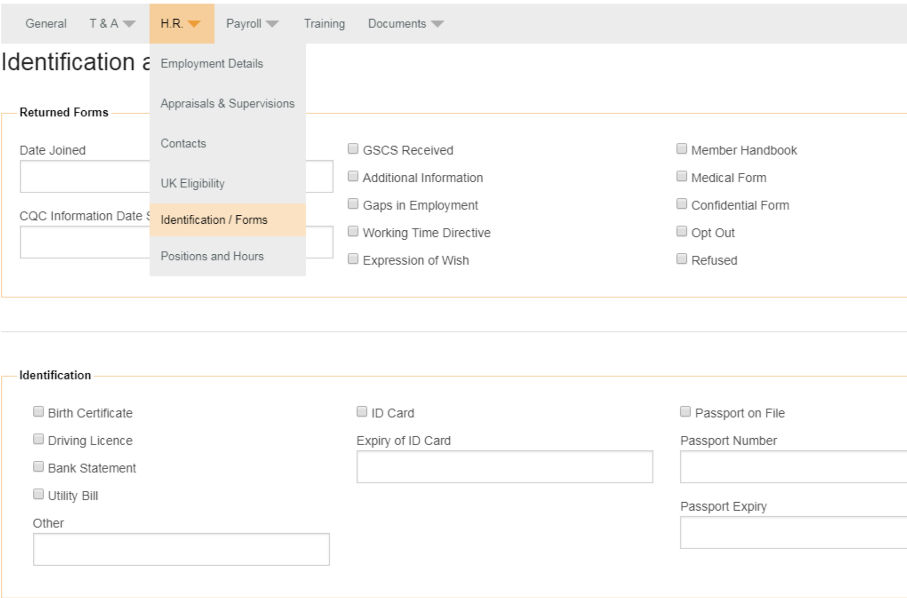
- Open the staff member's record
- Click on the H.R. drop down on the top bar
- Select Employment Details



Identification and Forms

This section is used for storing details on what forms have been returned and what identification was used to confirm their identity prior to their commencement of employment.

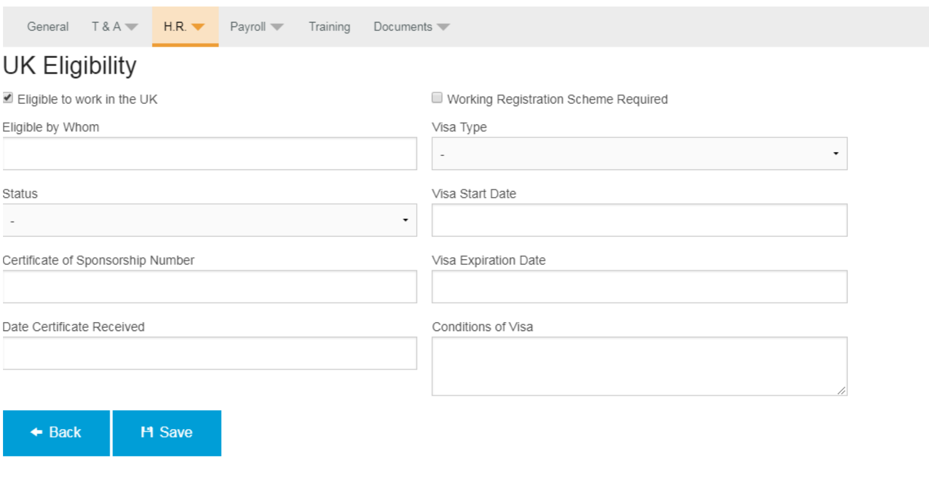
- Open the staff member's record
- Click on the H.R. drop down on the top bar
- Click Identification/Forms



UK Working Eligibility

This section is used for recording the staff member's eligibility to work in the UK including if relevant details of their Visa.

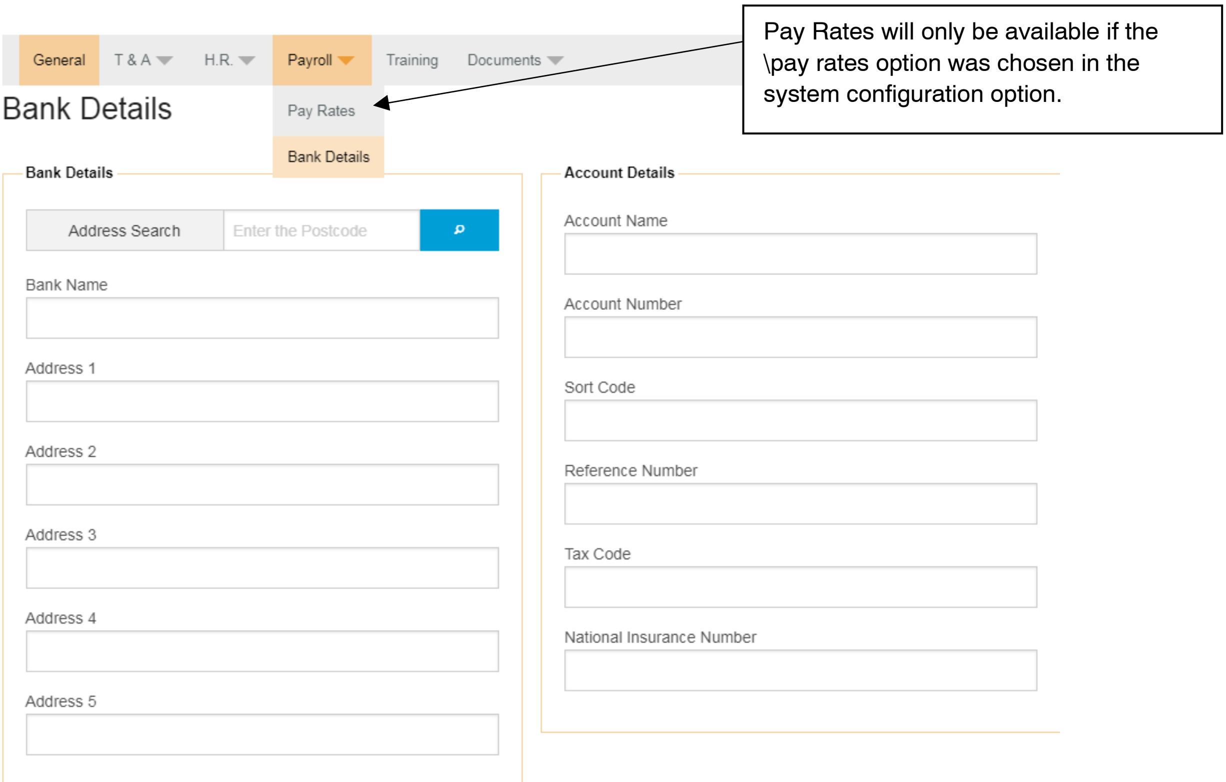
- Open the staff member's record
- Click on the H.R. drop down on the top bar
- Click UK Eligibility



Bank Details

This is where the Staff Member’s bank details, National Insurance number and what Tax Code they have are recorded on their staff file for Payroll.

- Open the staff member’s record
- Click on the Payroll drop down on the top bar
- Click Bank Details

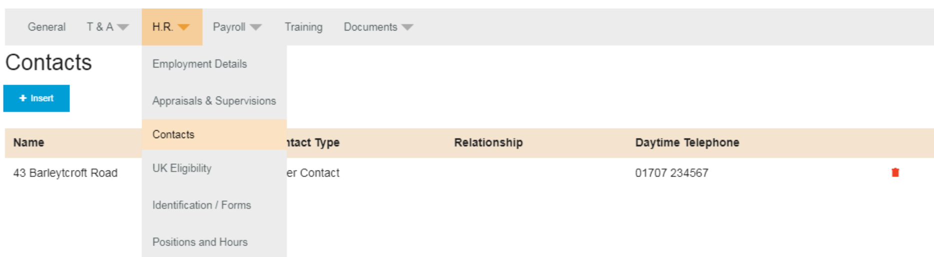


Staff Contacts

This is where you store any contacts required for the staff member including but not limited to their Next of Kin, Doctor and Family.

Inserting a Contact

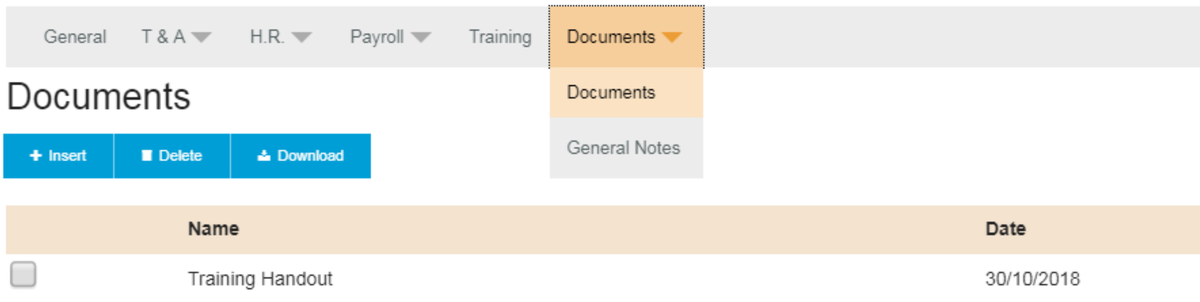
- Open the staff member’s record
- Click on the H.R. drop down on the top bar
- Click Contacts
- To insert a new contact click Insert
- To open an existing contact select it from the list.



Documents

The Documents section is where you upload any relevant documents to the staff record, there is no limitations on the file types than can be uploaded.

- Open the staff member's record
- Click on the Documents drop down on the top bar
- Click Documents



Uploading

- To upload a document click insert
- Enter a name for the document
- Select the date
- Click choose file and navigate to the file location
- Select the file and click Open
- Click Upload

Downloading

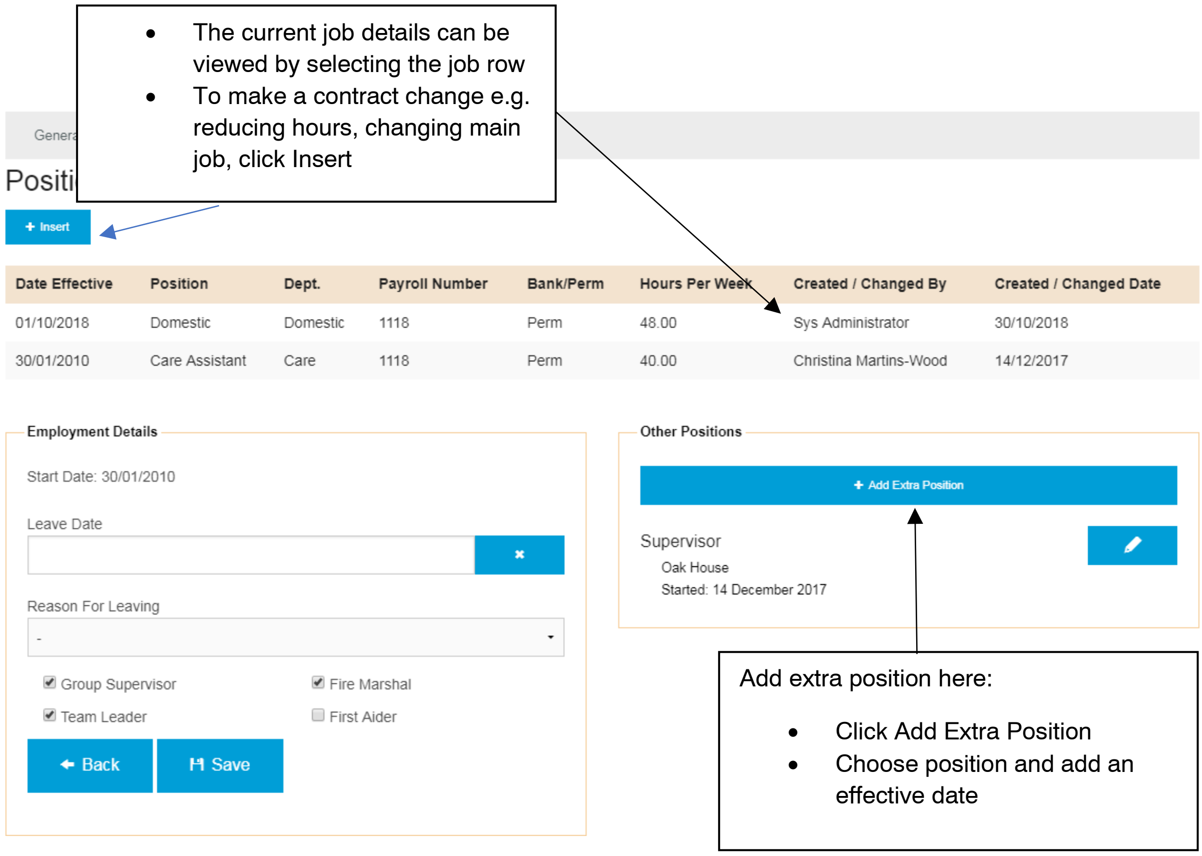
- Tick the box next to the document you want to download
- Click Download
- The document will download

Handy Hint: If you cannot see the downloaded document press **Ctrl** and **J** on the keyboard to bring up the downloads folder and the document will be in the list

Position and Contracted Hours

This section is where you enter the main position of the staff member and any additional positions they are able to work. It is also where you would process them as a leaver. All records entered in here link with the Payroll, Holidays, Timesheets, Rota and Calendar records. If an extra position has not been entered in here then they will not be able to cover shifts for that position in the Rota or Timesheets.

- Open Staff Member's Record
- Click on the H.R. drop down on the top bar
- Click Positions and Hours



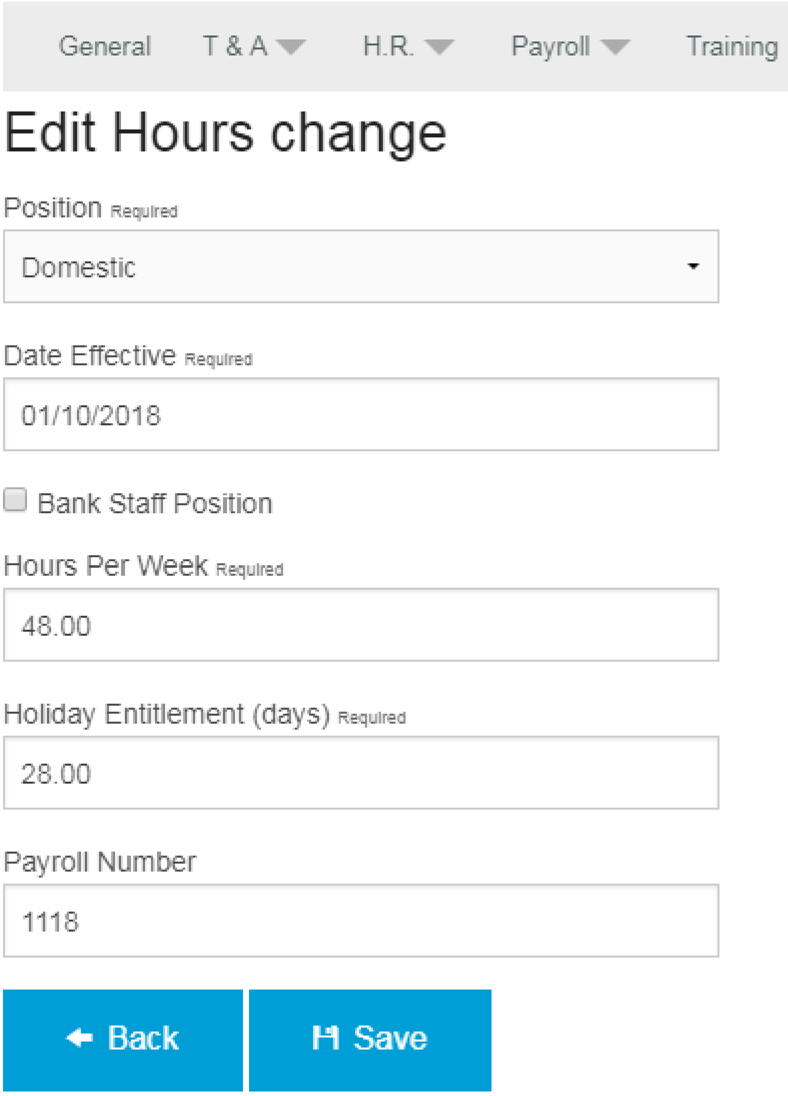
Adding New Contract

If a staff member changes their contracted hours or changes their main position you will need to insert a new position onto their record. If there is a change in their contracted hours you must still insert a new position with the new hours. Changes in their contract will affect their holiday entitlement if the contacted hours have changed. Follow the steps below to insert a new contract.

- In the Positions and Hours page click Insert
- Select the Position from the dropdown box
- Enter the Date Effective
- If they are a Bank Staff member tick the Bank Staff Position box
- Enter their contracted hours in the Hours Per Week box
- Enter their Holiday Entitlement (this is in days)
- If their Payroll number has changed update it
- Click Save

When a new contract has been inserted all previous contracts will be locked down and unable to be edited.

If you need to correct an error on the last position entered **<u>DO NOT</u>** insert a new contract. Click on the contract that needs updating in the list and make the amendments required and then save the record.



Extra Positions

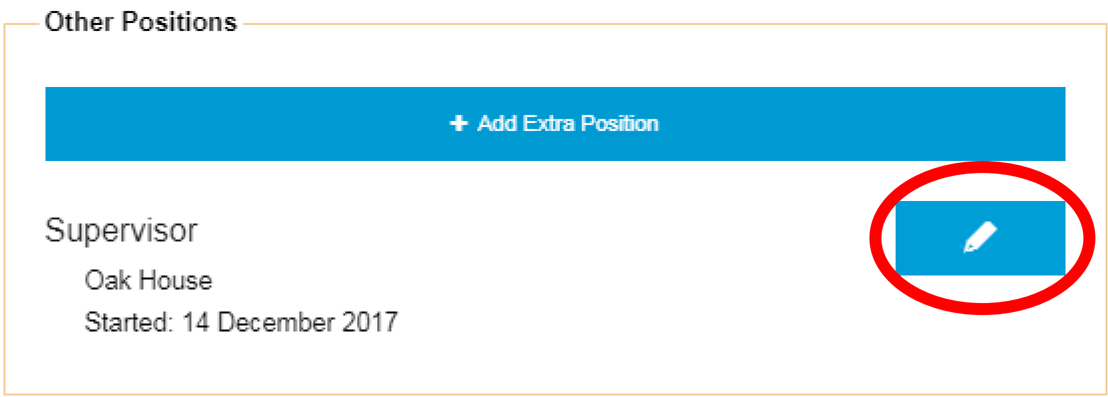
If you have staff members who can work and extra position this can be recorded and assigned to shifts in CoolCare4. A date limit can be entered on the positions that they can work, this will allow them to be assigned to an empty shift in the Rota or inserted onto a Timesheet within this date range only. If a date range is entered in here and you try to fill an empty shift in the Rota outside of the date range the staff member will not be on the list of staff members available to cover the shift. ***See Rota and Timesheet guides for more details**

Adding Extra Positions

- Click Add Extra Position
- Select the Date Effective and which home the position is at
- Select the Extra Position from the dropdown list
- Click Select

Ending Extra Positions

- Click the edit button on the position you are ending
- This will bring two boxes up, Started and Ended
- Click into the Ended box and select the end date



Pool Workers

If a staff member is a Pool worker who is available to work at other homes this needs to be entered as an Extra Position at the Homes they are able to work at regardless of whether it is their Main Position or not.

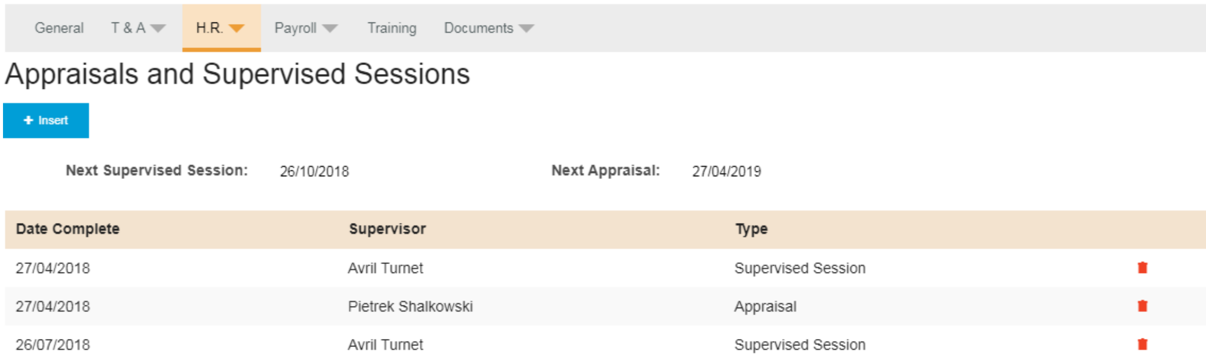
Managing Appraisals and Supervisions

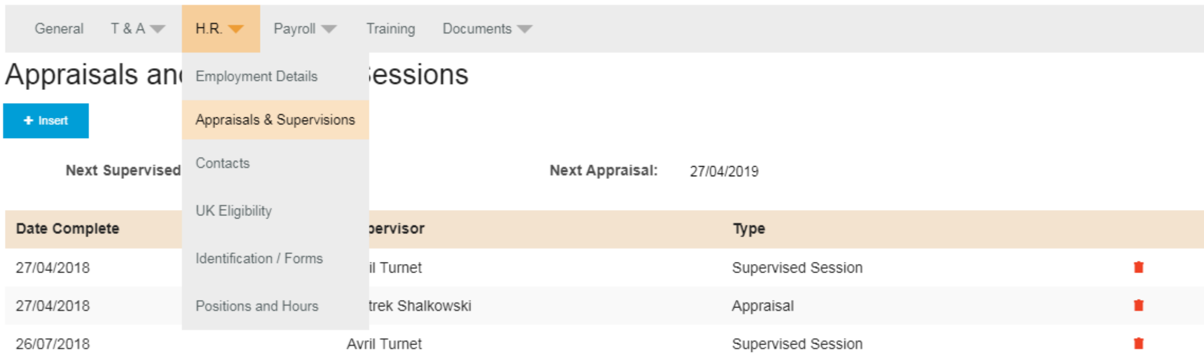
In CoolCare4 Appraisals and Supervisions are set to require renewal after a certain amount of time has passed, this is set in the System Configuration. You can record Appraisals and Supervisions and the completion date will automatically calculate when the next one is due. All the Appraisals and Supervisions created are stored on the Staff Record and can be viewed whenever required.

- Open Staff Member's record
- Click on the H.R. drop down on the top bar
- Click Appraisals & Supervisions

Recording Appraisals and Supervisions

- Open the Appraisals and Supervised Sessions page by following the navigation above
- Click Insert
- Select the type from the drop-down box
- Click in the Date Complete box and select the correct date from the calendar
- Click the Allocated Supervisor button
- Select the Supervisor from the list
- Tick the appropriate boxes
- Fill out any details of the Appraisal or Supervision
- Click Save



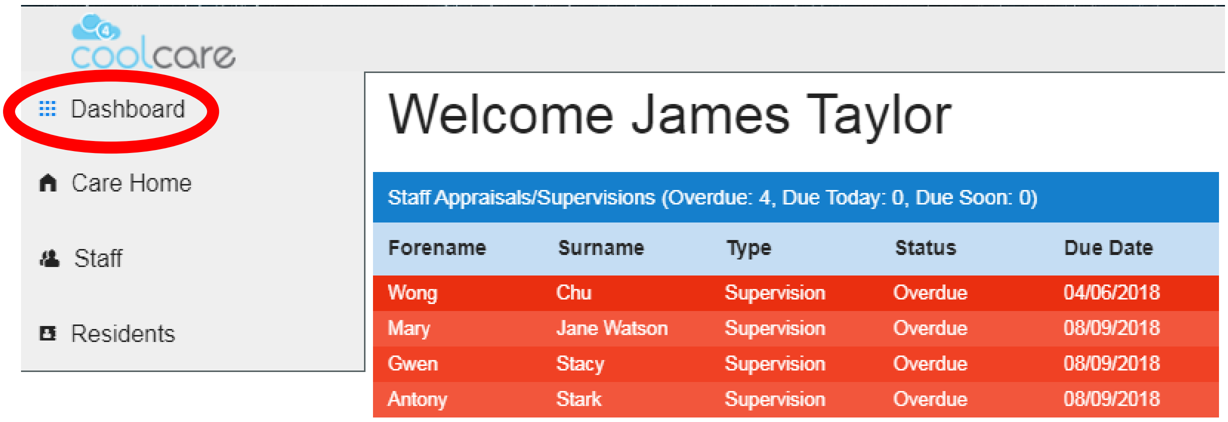


Monitoring Appraisals and Supervisions

Dashboard Widget

There is a Dashboard Widget that allows you to easily monitor your Appraisals and Supervisions, there are three flags for the Appraisals and Supervisions, Overdue, Due Soon and Due Today. To use this Widget it will need to be selected on their user account which is done in the Manage Users section ***See Getting Set Up Guide for more information***

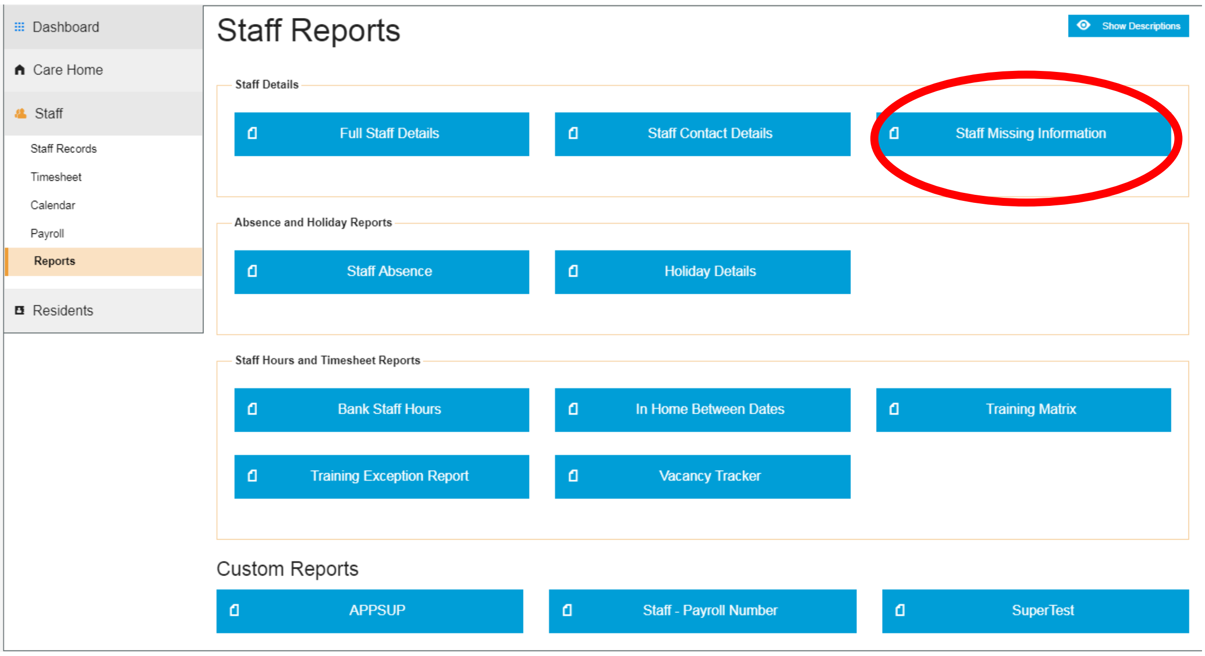
The Dashboard Widgets are located on the Dashboard screen, this is the first screen you will see when logging onto CoolCare4. To get back to it at any time just click the Dashboard button on the left hand bar, it is the top option above Care Home.



Reports

Another method of Monitoring the Appraisals and Supervisions is by using the Staff Missing Information Report. This report will show any information missing from Staff Records such as them not having a DBS or a missing Registered Professional Pin Number. As well as stating missing items from the Staff Record the report will also state any overdue, due soon and due today Appraisals and Supervisions. It also includes the date that they are due on the report much like in the Dashboard Widget

- Once logged into CoolCare4 click on the Staff Button
- Click Reports
- Click Staff Missing Information



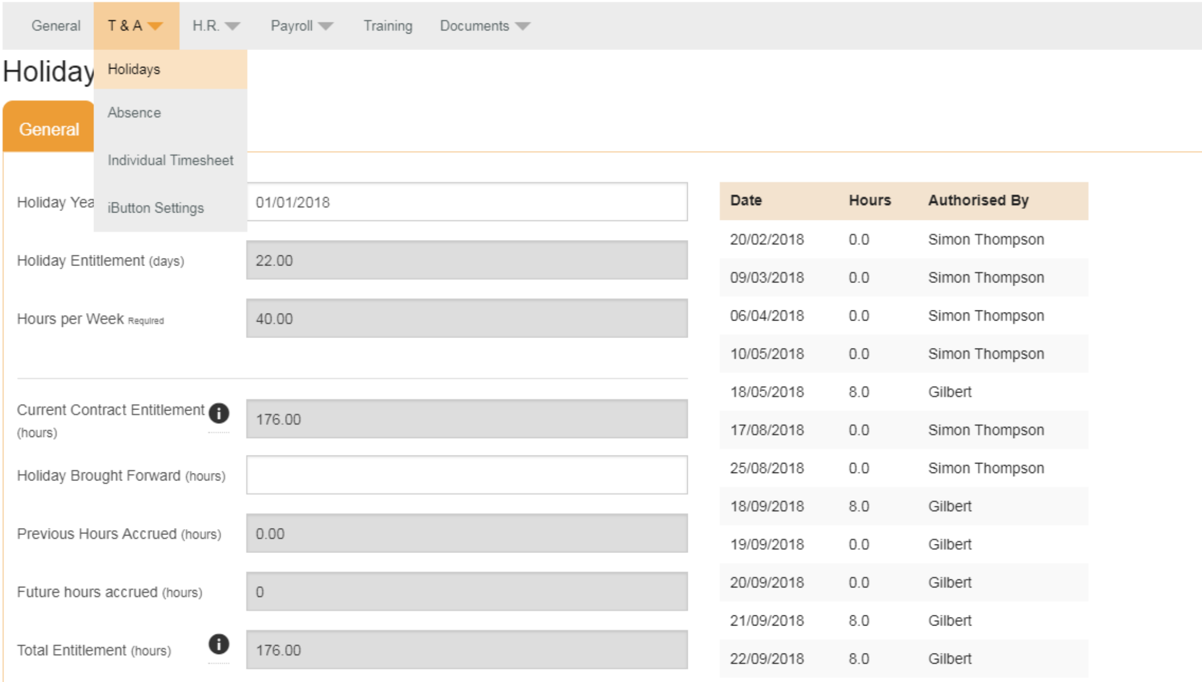
Holidays

The Holidays section is where Holiday Entitlement is monitored and where a record of all holidays taken is kept. Holiday Entitlement is controlled by the Staff Position and calculated based on their hours per week and what their Holiday Entitlement is. Any Holidays brought forward are entered in the Holidays tab and you can amend or insert a new contract on the

Hours History tab as well as in the Positions and Hours section - ***See Positions and Hours section for more information***

Handy Hint: Holidays are recorded in the Calendar on CoolCare4.

- Navigate to the staff record
- Click T&A dropdown on the top bar
- Click Holidays

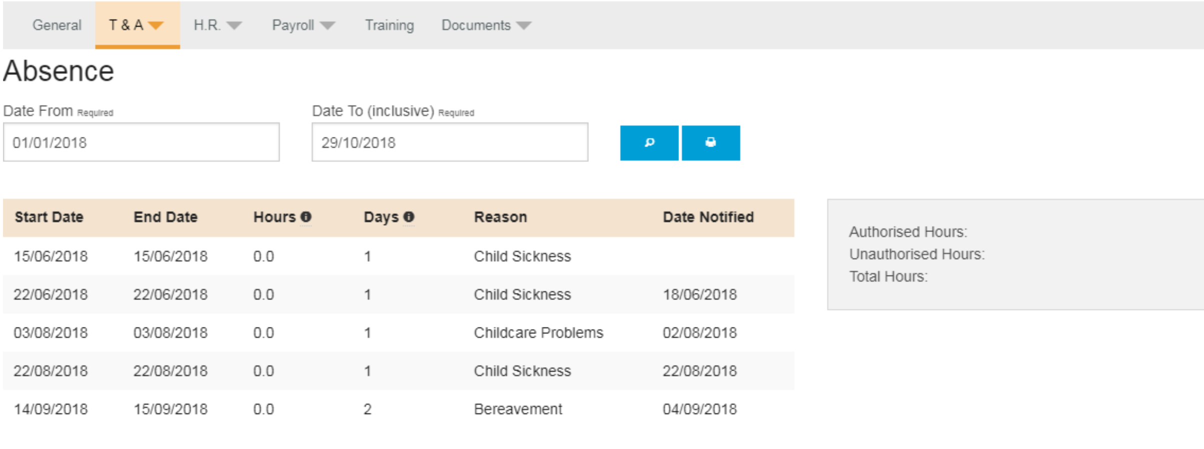


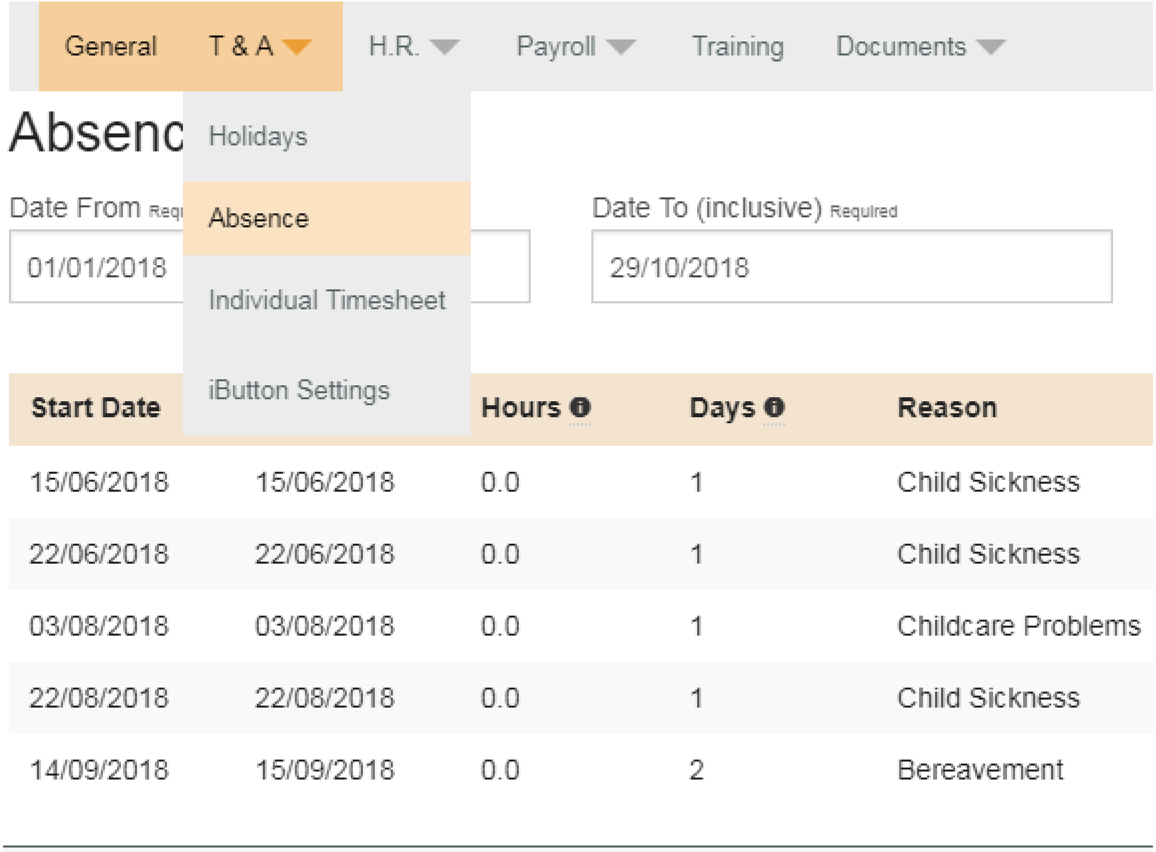
Absences

This section is where you can view and monitor any absences, within this section you can select a date range to view the absences from and to and it will give a list of all the recorded absences within this date range. This section is not where absences are recorded.

Handy Hint: Absences are recorded in the Calendar on CoolCare4

- Navigate to the staff record
- Click T&A dropdown on the top bar
- Click Absence

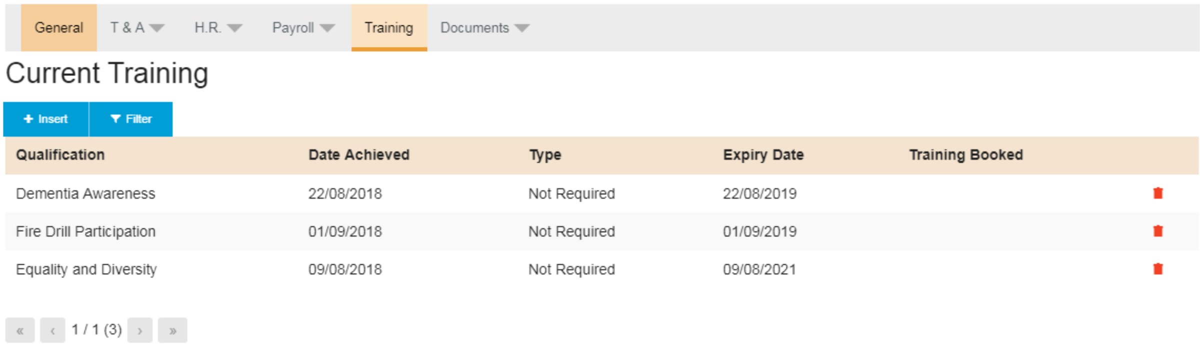




Training

This is where all the training courses that each staff member has achieved are stored, training courses can be inserted here as well as in the calendar entry for the training course they have attended. Where possible it is better to create the qualifications through the calendar entry.

- Navigate to the staff record
- Click Training on the top bar



Qualification	Date Achieved	Type	Expiry Date	Training Booked
Dementia Awareness	22/08/2018	Not Required	22/08/2019	
Fire Drill Participation	01/09/2018	Not Required	01/09/2019	
Equality and Diversity	09/08/2018	Not Required	09/08/2021	

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Timesheets

The timesheets on CoolCare4 are where all clocking in times are recorded and shifts are saved, if deductions are set up on the Staff Position then the hours are deducted from the shifts created here. Each Shift is colour coordinated and there is a guide to these colours along the top of the Timesheet.

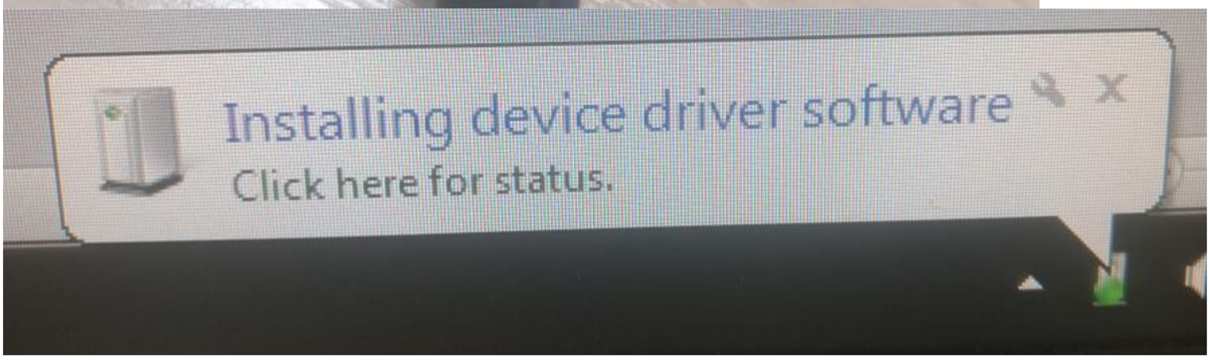
For more information see the Managing Your Timesheets guide

Assigning iButtons

An iButton is the device used by the staff members to clock in and out using the clocking in machine you have in your care home. This iButton must be assigned to them in their Staff Record, follow the steps below to do this.

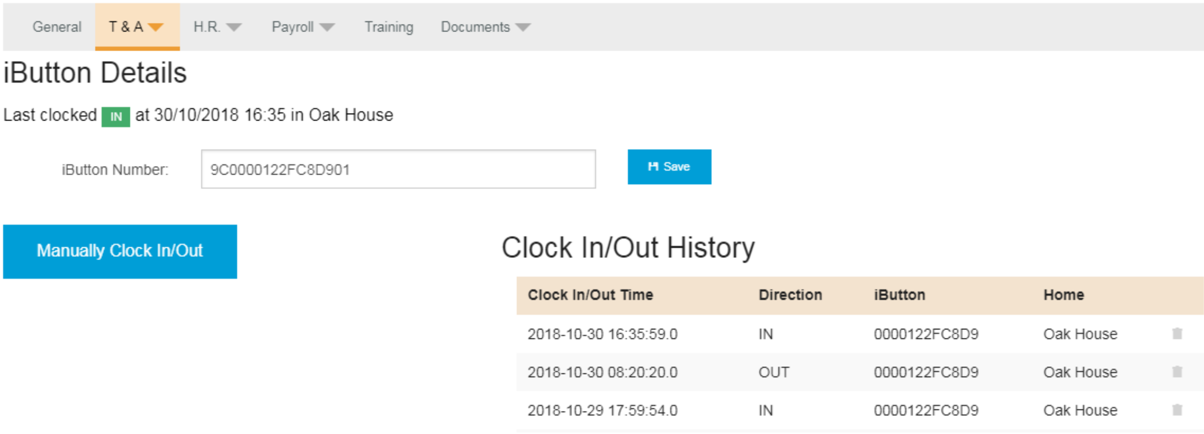
- You will need to get an iButton that is not currently assigned to a staff member and the iButton Keyboard
- Plug the iButton Keyboard into your computer via USB.

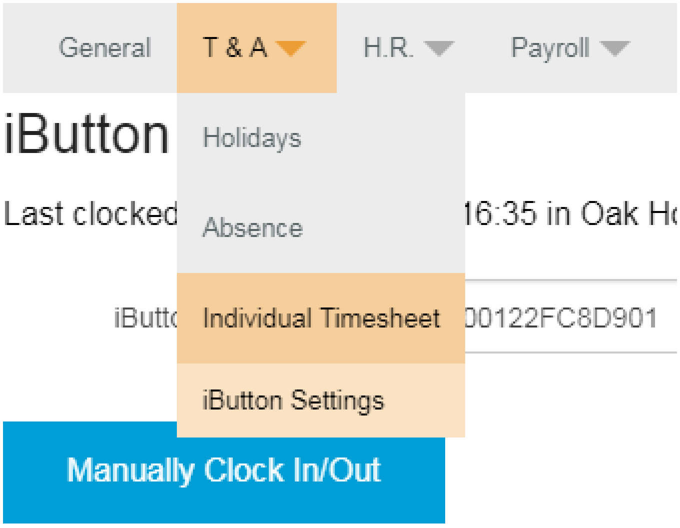
Please Note: if this is the first time plugging it into your computer it will take a couple of minutes to install the driver.



- Navigate to the Staff Member's record
- Once in the Staff Record click on the T&A dropdown on the top bar
- Click iButton Settings
- Click into the iButton Number text box
- Touch the iButton to the sensor on the iButton Keyboard
- If successful you will see an alphanumerical code appear in the text box.
- Click save

Handy Hint: The iButton number should be no longer than 16 characters long, if it is longer then it may have double scanned. Simply delete everything in the text box and rescan it.



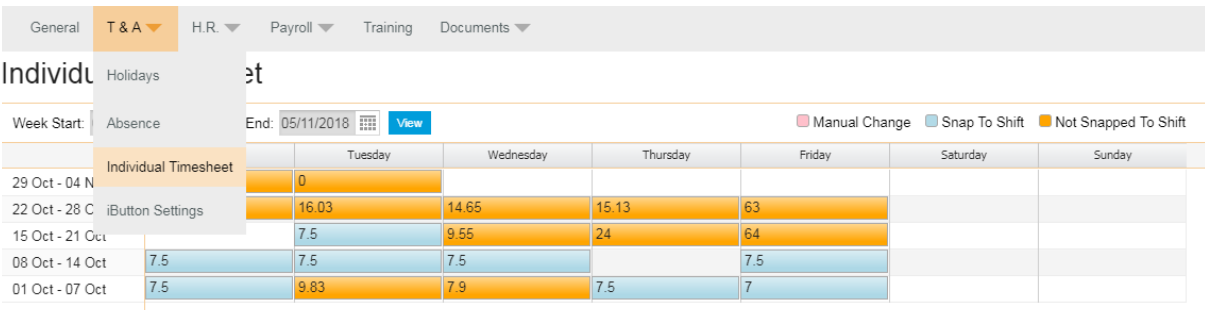


Individual timesheets

This is where you can view the individual timesheets, the default date range is set to the last 5 weeks, however you can select any date range you wish to view up to 15 weeks. You cannot amend hours in the Individual Timesheets page.

- Navigate to the Staff Record
- Click on the T&A dropdown on the top bar
- Click Individual Timesheets

SCREENSHOT OF INDIVIDUAL TIMESHEET SCREEN WITH NAVIGATION INCLUDED



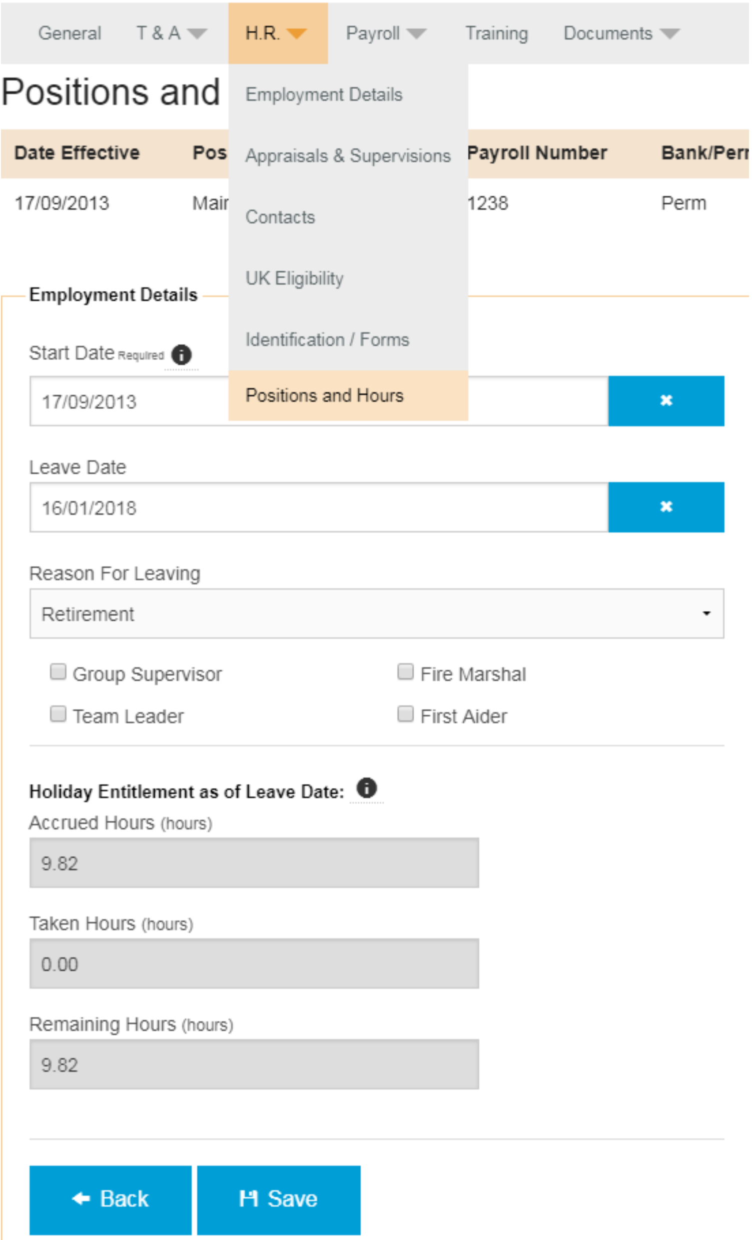
For more information please see the Managing Your Timesheets guide

Leavers

Processing Leavers

- Navigate to the staff record
- Click on the H.R. dropdown on the top bar
- Click Positions and Hours
- Click in the End Date box and select the date
- Select a reason for leaving from the dropdown box
- Click Save

Handy Hint: If their leave date is set in the future they will still show up in the current staff list until the date they leave.



Leavers List

The leavers list is where all the staff members who have left are stored in case you need to access their record.

- Navigate to the Staff Records page
- Click on the dropdown box at the top
- Select Leavers

Please Note: The Staff Records page will always display the Current Staff when you open it regardless of what you were viewing before.