

Timesheets

Review

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Managing the Timesheets

The timesheets are where all clocking information is processed and links to payroll to determine how many hours staff members will be paid for based on the times they clocked in and out. The timesheets can be viewed at two different levels, per home showing all the timesheets for all staff members and per staff member showing all timesheets for a specific staff member.

Navigating to the Home Timesheets

- Log in to CoolCare4
- Staff
- Timesheet

Here's an example of what the timesheet will look like:

Timesheet		Choose Week	Include staff with empty timesheets		<input type="checkbox"/> Authorised <input type="checkbox"/> Manually Changed <input type="checkbox"/> Snapped to Shift <input type="checkbox"/> Not Snapped to Shift		Compare To Rota	Export	Lock				
Forename	Surname	Position	C	W	S	E	Mon 02/11/2020	Tue 03/11/2020	Wed 04/11/2020	Thu 05/11/2020	Fri 06/11/2020	Sat 07/11/2020	Sun 08/11/2020
Carrie	Hulme	Unit Mana...	48	12	12	0				12	0.5(T)		
Charlie	Gold	CA	33	0	0	0					0.5(T)		
Chris	Cringle	SAP	24	0	0	0		6(A)	6(A)		0.5(T)		
Courtney	Wheeler	CA	44	11.75	11.75	0				11.75	0.5(T)		
Emily	Adams	Nurse	40	0	0	0					0.5(T)		
Emily	Galileo	CA	44	0	0	0				0	0.5(T)		
Gail	Farnham	Nurse	36	3	3	0				3	0.5(T)		
Georgina	Black	CA	33	0	0	0					0.5(T)		

- Shifts appear on timesheet from an employee clocking in and out and match against the position definitions (entered shift times for each position that are set up in Care Home/ Positions), for each position within the care home.
- Each shift is colour coded as follows:
 - Green – the shift has been authorised
 - Pink – the shift has been adjusted manually
 - Blue – snapped to shift (matches the shift definition and within the shift configuration rules)
 - Amber – not snapped to shift (this does not match shift definitions or not within the shift configuration rules. The hours must be checked and possibly amended)
- Additional codes will appear in brackets i.e. T for training, E for extra, A for Absence and H for Holiday

Checking the Timesheets

Although CoolCare will automatically correct some hours, the timesheets should still be checked to ensure that everyone's hours are correct. We recommend checking the Timesheets daily the morning after when all night staff have clocked out. There are various aids that can be used to help with checking timesheets which are explained throughout this guide.

Clocking In and Out

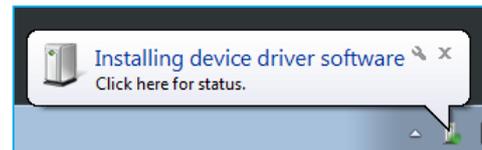
Assigning iButtons

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. An iButton must be assigned to a staff member in order for them to start clocking in and out.

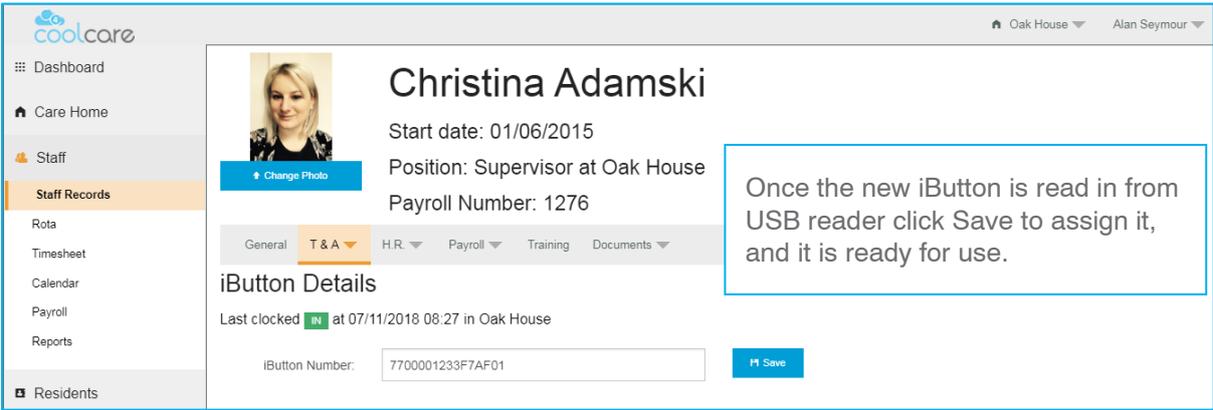
Assigning an iButton

- Select 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



coolcare Oak House ▾ Alan Seymour ▾

Dashboard
Care Home
Staff
Staff Records
Rota
Timesheet
Calendar
Payroll
Reports
Residents

Christina Adamski
Start date: 01/06/2015
Position: Supervisor at Oak House
Payroll Number: 1276

General **T & A** ▾ H.R. ▾ Payroll ▾ Training ▾ Documents ▾

iButton Details
Last clocked **IN** at 07/11/2018 08:27 in Oak House

iButton Number: Save

Once the new iButton is read in from USB reader click Save to assign it, and it is ready for use.

Clocking In and Out Via The Clocking in Machine

The Nohmad clocking in machine records the time and date of when each staff member clocks in, it transmits this information to CoolCare's servers and transfers this information onto your home's timesheets.

To clock in all you need to do is place the iButton on the sensor and wait for it to beep. In addition to the beep a light on the right-hand side of the clocking in machine will illuminate to indicate it has captured the clock.

Please Note: The first time a staff member clocks using the Nohmad will be a clock in regardless of whether they are clocking in or out, so you need to make sure that the first time a new staff member clocks they are clocking in.

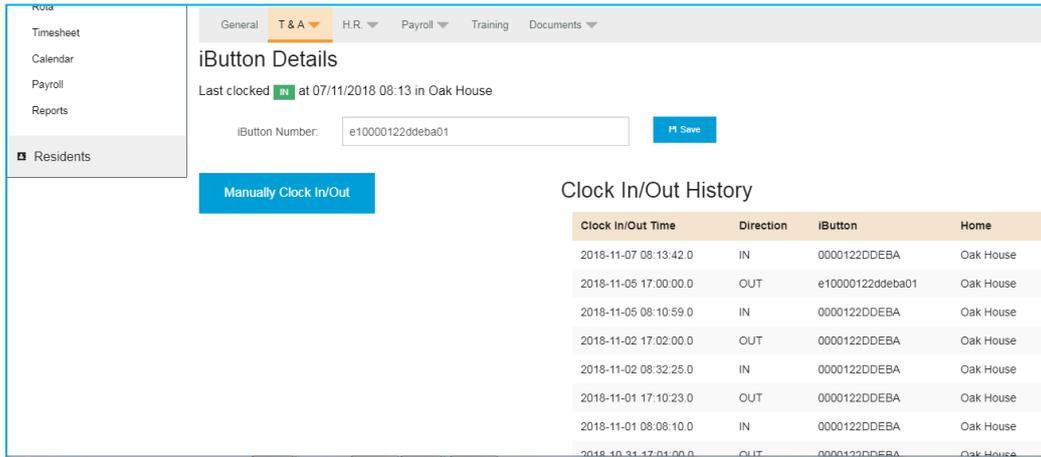
Manually Clock in and Out

If a staff member forgets to clock in or out of their shift you have the ability to add in a manual clocking entry within the last 7 days. When adding a manual clock, you will just need to enter the date, time and home that the missing clock was for and CoolCare will work out the direction (in/out).

Adding a Manual Clock

- Navigate to the Staff Records
- Open the Staff member's record
- Click on the T&A dropdown
- Click iButton Settings
- Click Manually Clock In/Out
- Select the date of the missing clock
- Enter the time of the missing clock
- Select the home from the drop down
- Click Save

Please note: You can only enter manual clocks for up to 7 days ago. When a manual clock has been entered the direction of all subsequent clocks will be updated to reflect the change, and the timesheet events will also be updated.



Clock In/Out Time	Direction	iButton	Home
2018-11-07 08:13:42.0	IN	0000122DDEBA	Oak House
2018-11-05 17:00:00.0	OUT	e1000122ddeba01	Oak House
2018-11-05 08:10:59.0	IN	0000122DDEBA	Oak House
2018-11-02 17:02:00.0	OUT	0000122DDEBA	Oak House
2018-11-02 08:32:25.0	IN	0000122DDEBA	Oak House
2018-11-01 17:10:23.0	OUT	0000122DDEBA	Oak House
2018-11-01 08:08:10.0	IN	0000122DDEBA	Oak House
2018-10-31 17:01:00.0	OUT	0000122DDEBA	Oak House

You can also archive a clock, which stops it from being included on the timesheet clock history using the orange archive button on the Clock In/Out History.



and

Snapping to Shift

When a staff member clocks in and out CoolCare4 will snap their shift to a predefined shift. This means that if a staff member clocks in and out within the range of a predefined shift, the hours on the timesheet will set as the shift hours rather than the specific hours the staff member clock in for. (See Getting Set Up guide for more information on setting shifts and shift limits).

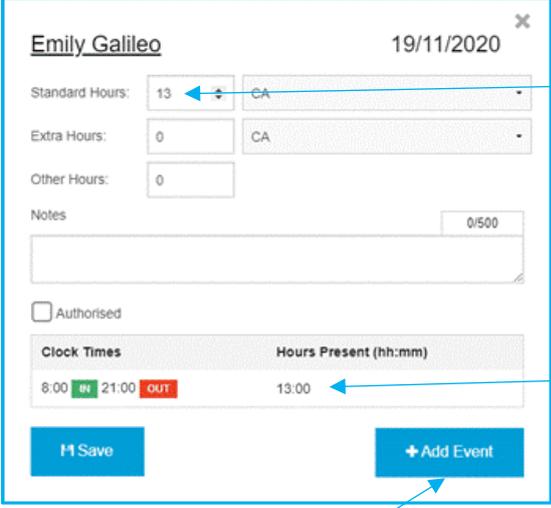
If a shift snaps to a shift it will display as blue on the timesheets indicating that the shift should be correct. However, if the shift does not snap to shift it will appear as orange indicating that the shift should be checked to ensure it is correct.

Managing Timesheet Records Adding or Changing Shifts

If a shift does not exist or has the incorrect number of hours, or the staff member has worked extra or other hours you can amend the shift directly on the timesheets.

- Navigate to the Timesheet
- Find the staff member in the list
- Click on the shift you are wanting to amend or the empty cell
- Change the hours
- Click Save

Please Note: Amending the timesheet hours will not correct the direction of the staff members clocking in and out. If a staff member has forgotten to clock in or out a manually clock should be added.



Hours can be amended here. Standard hours may also need to be amended to Extra hours if overtime has been worked.

Clock times are shown here. If a staff member has forgotten to clock in or out these may need a manual clock.

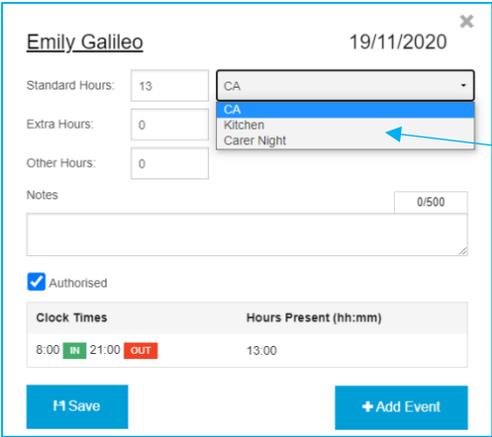
You can also use the **Add Event** button to add a second timesheet event if a staff member already has one for that day. This second entry will appear the original for that staff member and day, and can be amended like any standard timesheet entry.

Changing Position Worked

If a staff member has can work multiple positions you can change which position they worked on a particular shift. The positions available to select from are only positions that they have in their record as Extra Positions or their Main Position.

- Navigate to the Timesheet
- Find the staff member in the list
- Click on the shift you want to amend the position for
- Change the shift in the drop-down box
- Click Save

Please Note: For further information about extra, main and pool positions see the staff guide.



You can alter the position worked by selecting the new position from the drop-down menu.
If the position does not exist, add an extra position from the HR menu in Staff Details.

Locking and Unlocking Timesheets

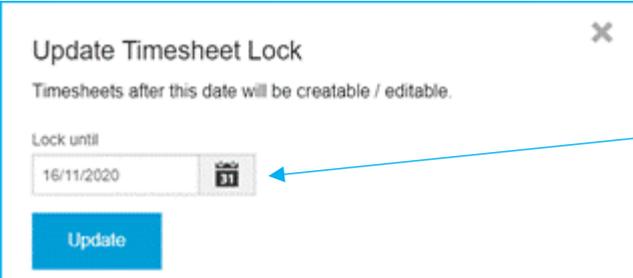
In order to keep Payroll accurate, you have the ability to lock the timesheets in CoolCare4 so that no other amendments can be made to them prior to a specified date.

Locking the Timesheets

- Navigate to the Timesheet
- Click on the Padlock symbol
- Select the date you want to lock the timesheets up to

Unlocking the Timesheets

- Navigate to the Timesheet
- Click on the Padlock symbol
- Select the date of the day before you need to be unlocked



You can lock / unlock a timesheet by clicking on the lock icon and then entering the day you wish the lock to be valid from

To unlock enter the day before you wish to edit

Daily Total

The Daily Totals are the numbers of worked hours and display across the bar at the bottom of the Timesheets. The colours indicate if your home is staffing within your budget hours and can be used as a quick check if there are any issues with the timesheets during your daily checks.

- Red = over the budgeted hours
- Green = under the budgeted hours
- White = On target

For more information on setting the Daily Totals please see the Getting Set Up guide.

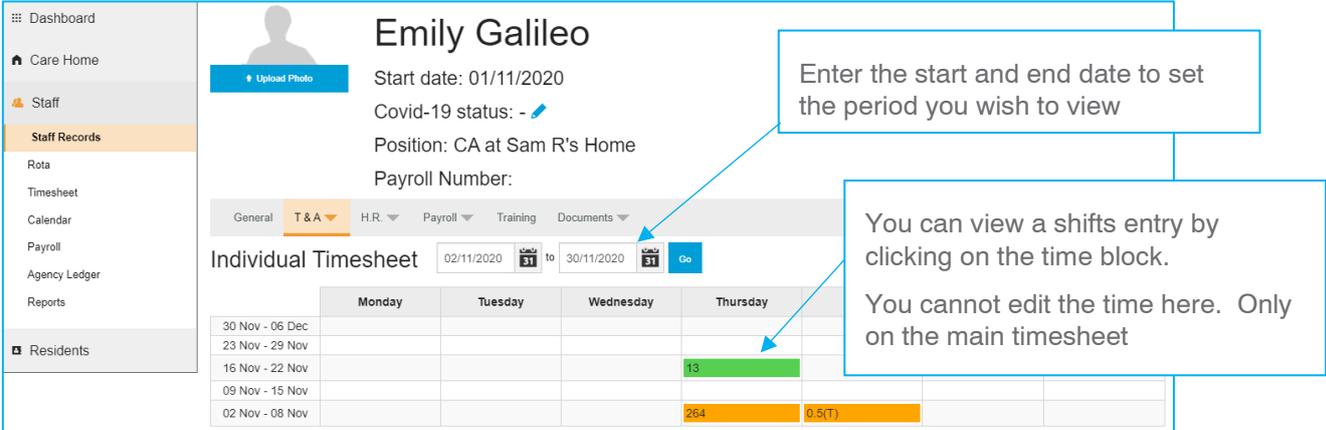
Individual Timesheets

As well as the full timesheet you have the ability to view Staff member's timesheets individually. The benefits of viewing the individual timesheets is that you can view all the timesheets within a date range specified as long as it does not exceed 15 weeks.

- Navigate to Staff Records
- Open the record of the staff member you want to view the timesheets for
- Click the T&A dropdown on the top bar
- Click Individual Timesheet

Once you are in the Individual Timesheet page the default will display the last five weeks of timesheets. To change the date range you can select the date range by using the selection at the top.

Please Note: You cannot manually add or edit timesheet events in the Individual Timesheet



Comparing the Timesheet to Rota

Using the Compare To Rota button in the top right corner of the timesheet, the timesheet looks at the rota data and flags up any discrepancies between the two. It will show an exclamation mark symbol against any shift it finds a discrepancy with for you to check. Hovering over the symbol can tell you more about the hours without you needing to click in to the shift itself.



Timesheet Reports

There are several reports available for you to use to analyse your timesheet hours.

Timesheet Export

The timesheet export is a full CSV export of all hours worked on the timesheets per week. It includes staff member, date, hours type, position, hours worked, as well as any notes from the timesheet events.

- Navigate to the Timesheet
- Select the week you want to export
- Click Export as CSV

The below reports can all be found within the staff reports sections, and are available at group, company and home levels.

Navigation to staff reports

- Expand the Staff Section
- Click Reports, this is at the bottom of the list

Budget Vs Timesheet

This report compares the budgeted hours set up within your rota setup with the timesheet's hours for a specified period. This helps indicate how well the home is been staff against the hours budget.

Planned Vs Timesheet

This report compares the planned hours for the rota with the timesheet's hours for a specified period. This helps indicate how well the home is been staff against what was planned to happen.

Budget Vs Planned

This report compares the budgeted hours within your rota set up with the planned hours set up within your rota for a specified period. This helps indicate how well the rota is been planned against the budget.

Timesheet Totals

This report gives you a full breakdown of all the hours in the timesheets for all staff members at the home within a given period.

Staff Hours Analysis

This report allows you to compare budget hours against your timesheet hours within a given period. It can be run at group, company or home level. The report will display for each day in the date range: occupancy and occupancy percentage figures, broken down by department if ran at home level. It also includes a comparison between the Budget vs Planned, Budget vs Timesheet and Planned vs Timesheet figures.