



Payroll – Pay Rates

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Payroll – Pay Rates

The Payroll section is used for analysing, managing and exporting payroll data from CoolCare. The guide is for “Pay Rates” in which a payroll report can be run which includes pay rates, this is to be used when you are outsourcing your payroll to an external company.

Payroll Configuration

When you are using the CoolCare4 software without an external Payroll Software, such as Sage Payroll, you can specify the pay rates for each staff member within CoolCare4. Once these have been set up you can run off a Payroll report and an accompanying CSV export.

Staff Payroll Number

You can enter a staff members payroll number when inserting a new staff record onto CoolCare. Alternatively, you can enter the staff members payroll number after the record has been added to CoolCare.

- Navigate to the Staff Records
- Open the record of the Staff member you need to add the Payroll Number to
- Click on the H.R dropdown on the top bar
- Click Positions and Hours
- Click their Staff Position record to open it
- Enter the Payroll number
- Click Save

Handy Hint: You can only amend the current Staff Position they hold, if they have a new position inserted you will not be able to amend the previous position.

Please see Staff guide for more information on position and hours records.

Pay Rates

In order to use the Payroll when you have Pay Rates selected, you will need to add the rate of pay for each member of staff individually. To do this follow the below steps:

- Navigate to the Staff Records
- Open the record of the staff member
- Click on the Payroll drop down on the top bar
- Click Pay Rates
- Enter the hourly rate for each of the options, if they are bank staff you must enter these in the Bank Staff Codes tab.

Handy Hint: If the staff member has extra positions, you can set the pay rates for those different positions by selecting it from the drop-down box.

Statutory Holidays and Geolocation

Statutory Holidays

In CoolCare4 you can set up the Statutory holidays and specify what regions they apply to and what Special Pay Code applies on this day. This enables you to set double time or similar rates of pay on specific days, for chosen locations.



- Click on your name in the top right corner of the screen
- Click Lookups
- Under Staff Lookups click Statutory Holidays
- Click Insert
- Fill out all the fields and click save

o

Statutory Holiday

Add Date and Description

Date Required
25/12/2018

Description Required
Christmas Day 2018

Select special code field for enhanced pay for this date

Special Pay Code Required
Special Day 3

Geolocations Required
All

Select Geolocation and Save

← Back H Save

Geolocation

Geolocation is where the Care Home is located, this is used for various things including determining what days are set as Statutory Holidays. For example, if you set up St Andrews Day as a Statutory Holiday with the Geolocation as Scotland, only care homes within your group that have Scotland set as their Geolocation will use the Special Pay Code set up in the St Andrews Day record.

Running Payroll

Payroll information is taken from the timesheets, for further information on managing timesheets, including locking timesheets see the timesheet guide.

Navigation to Payroll

- Select Staff
- Select Payroll
- Enter the start and end dates of your payroll period.

Payroll Report

Selecting the 'View Report' button will open the Payroll Report. The Payroll Report displays all staff members with a breakdown including hours worked, hours type and rate of pay.



Export Payroll Data

Selecting the 'Export Payroll Data' button will produce a more legible version of the Sage CSV report which can be used to analyse the information been exported from the system.

Export Timesheet Data

Selecting the 'Export Timesheet Data' button will produce an excel spreadsheet detailing timesheet information for the data range requested including if shifts have snapped and any notes put onto the timesheets. This can be used to better validate timesheet hours.

Leavers Within Period

The 'Leavers Within Period' table displays a list of all staff members who have been processed as leavers within the given payroll period.

You can export the list of leavers by selecting the 'Export Leavers' button.

The screenshot shows the 'Payroll' section of the Coolcare system. The left sidebar contains navigation options: Dashboard, Care Home, Staff, Staff Records, Rota, Timesheet, Calendar, and Payroll. The main area displays the 'Payroll' form with 'Start Date' (01/08/2018) and 'End Date' (20/10/2018) fields, and buttons for 'View Report', 'Export Payroll Data', and 'Export Timesheet Data'. Below this, a table titled 'Leavers Within Period' shows data for three staff members. An 'Export Leavers' button is located above the table. Three callout boxes provide additional information: one points to the date range, another points to the 'Export Leavers' button, and a third points to the 'Leavers Within Period' table.

Any leavers within the date period entered at the top of the page will be displayed in the leavers section

Leavers can be exported to a CSV file by clicking here

Tables display data from 01/08/2018 to 20/10/2018

Pay No.	Name	Position	Start Date	Leave Date	Leave Date Changed	Reason	Holiday Remaining
748290	Mr Claus Fischer	Care Asst	24/04/2006	10/08/2018		Personal Reasons	20.88
	Mr Doris Brown	Domestic	24/05/2018	01/08/2018	13/08/2018	Low Job Satisfaction	37.59
145689	Mr Alan Carlisle	Domestic	19/08/2018	19/08/2018		Ill Health	0



Starters Within Period

The 'Starters Within Period' table displays a list of all new starters who have been processed within the given payroll period.

You can export the list of leavers by selecting the 'Export New Starters' button.

Any Starters within the date period entered at the top of the page will be displayed in the Starters section

Starters can be exported to a CSV file by clicking here

Name	Position	Start Date	NI Number	Tax Code
Mr Steven Smith	Cook	04/09/2018		
Mr Alan Johnson	Care Asst	12/09/2018		
Mr Alan James	Dementia Care	13/09/2018		

Staff Changing Permanency

The 'Staff changing from Permanent to Bank Within Period' and 'Staff Changing from Bank to Permanent Within Period' tables show staff who have change their contracts from bank to permanent or vice versa within the given payroll period.

Handy Hint: When staff contracts are changed from bank to permanent or vice versa their payroll number will have automatically have been removed.

Staff changing from bank to permanent and vice versa within the specified pay period will be displayed here

Pay No.	Name	Old Position	New Position	Contract End Date
1239	Mr Graham Edwards	Care Assistant	Care Assistant	14/11/2018

Pay No.	Name	Old Position	New Position	Contract End Date
	Ms Avril Turnet	Kitchen Assistant	Kitchen Assistant	14/11/2018