

Staff Calendar

Review

Date	Version	Reviewed By	Comments
06/03/2020	V1.0.1.01_draft	Michaela Regan	Create draft document
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Introduction

The staff calendar feature enables the planning and recording of events relating to staff. Holidays, training and absence is recorded through the staff calendar.

Using the staff calendar gives the Home management team an overall view of events that are scheduled within a specified period. Here you can review holiday requests and authorise them, plan training courses and record staff absence where you will have an overall view of scheduling and the impact on the smooth running of the Home.

Calendar events created by the Home Management team are shown in the Staff Portal, My Calendar view.

Staff using the Staff Portal option can request Holiday that appears as an authorised request in the Calendar.

Recording Holidays, Absences and Training

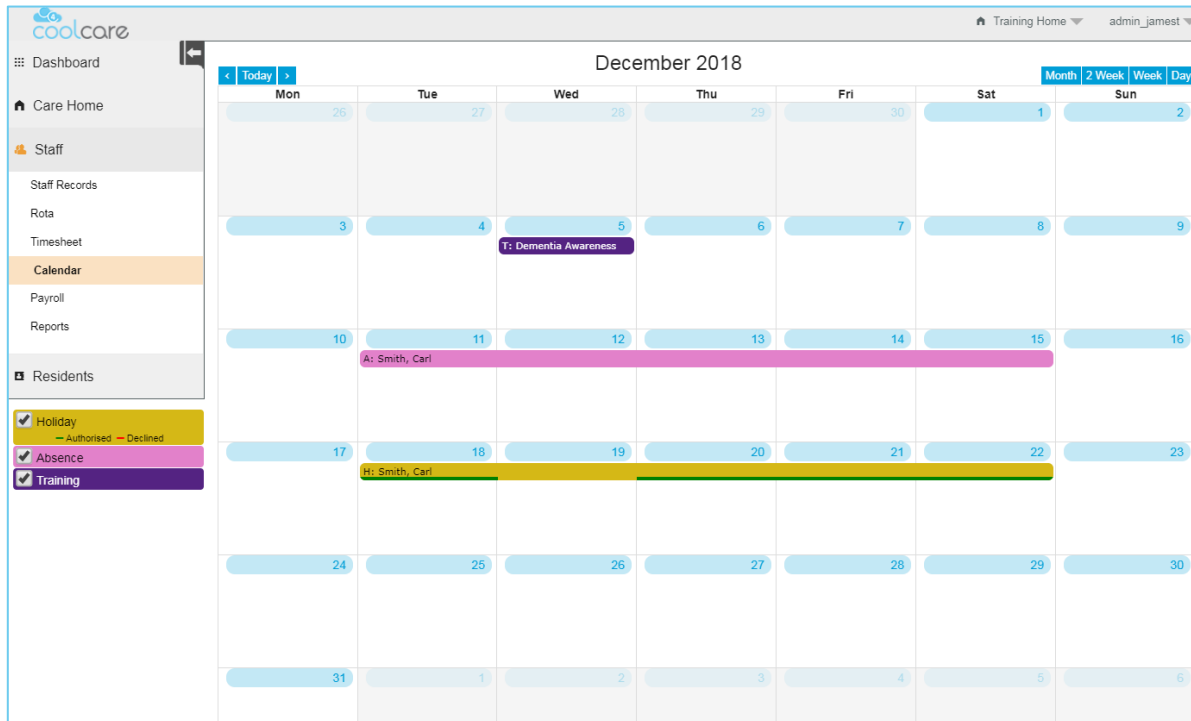
Holidays, Absences and Training events are all managed through the calendar on CoolCare. When creating a calendar event, you can remove staff members from rota shifts and add hours to timesheets for the different events ready for payroll, for example Absence.

Calendar Navigation

- Select Staff in the left menu.
- Select Calendar.

The default view for the calendar is current month. You can change the period displayed by choosing a different view option from the top-right hand area of the screen. Click on the selected view type to change the calendar view. This can be useful if you have a number of events scheduled for the same day.

Use the navigation buttons to skip forward or backwards as required. Use the 'today' button to quickly return to the current day in the calendar.

Use the filter options on the Calendar to reduce the information on screen, for example to only review planned training, untick Holiday and Absence.



Note the colour coding shown on the filter, this is a visual descriptor to help identify a specific event type.

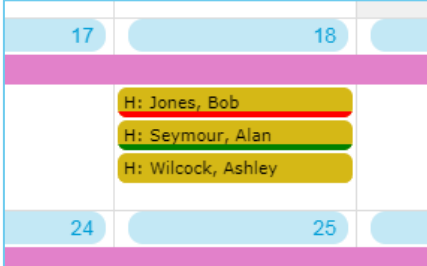
Holiday

Holiday events can be created directly in the Staff Calendar or via the Staff Portal feature.

Holidays with a solid green underline describes authorised holiday time (example Alan Seymour)

Holiday with a solid red underline describes declined holiday requests (example Bob Jones)

Holiday with no underline is a request only and has neither been authorised nor declined (example Ashley Wilcock).



17	18
H: Jones, Bob	
H: Seymour, Alan	
H: Wilcock, Ashley	
24	25

Absence

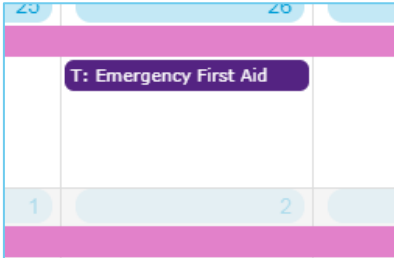
Absence from work could be a number of reasons including sickness, dependents leave, specialist medical appointments. It is important to record absence correctly especially if your staff are unpaid for sickness and if you are recording absence against the Bradford Factor. All absence is denoted Pink.

A continued Pink line of absence denotes a continued absence for example Maternity Leave

The absence appears in the calendar as a single pink line and shows the start and end date of a period of absence and is date inclusive.

Training

Training is denoted purple on the Calendar



23	24
T: Emergency First Aid	
1	2

Absence

Absences can be long or short-term. Absence records added to the calendar will appear in the staff members file and in the absence reports. Authorised absences will appear in the timesheets and payroll sections.

Adding an Absences Event

Before recording absence, consider the type of absence and the reason. Some absence types are to be counted towards the Bradford Factor score; others may be exempt.

Reasons for Absence are defined in the Lookups section of CoolCare.

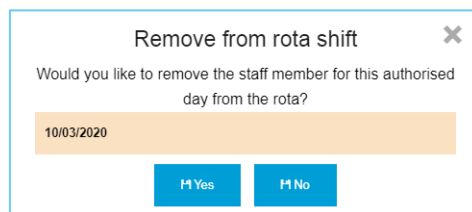
- From the Staff Calendar, click on the date that the absence starts
- Click 'Absence'
- Choose the staff member from the drop-down list that the absence refers
- Enter the 'Date Notified' field of when you first received notification
- Enter the start and end date of the absence in the when 'from – to' fields
- Select the Reason for absence from the list
- If it is expected the staff member will be absent for a period of time outside normal self-certification timescales or this is assessed as an ongoing illness with no clear return to work date, click this field. An example may be Maternity Leave where a staff member will be absent for months rather than days. The continuing absence will be updated each day automatically. When the staff member returns to work, uncheck the flag and set the absence end date.
- Click the Self Certified box if the staff member has self-certified this absence and has not obtained a medical note to support it.
- Click the Doctors Note field if the absence is supported by a medical note or fit note
- Enter any supporting notes that may help should you need to refer back to this absence at a later date
- If at this point, the absence is authorised (by a fit note or is maternity leave) and you have permissions to authorise absence, you can choose to set the authorisation at this point before saving.

Should the absence occur during a period where the staff member is assigned to a shift on the rota, the 'Hours' field will automatically populate with the assigned hours from the shift. This value can be overridden.

- An example may be that a staff member requires absence to attend a funeral but is assigned a 12-hour shift. You can update the number of agreed hours of absence to attend the funeral.
- Click Save

Assigned Shift

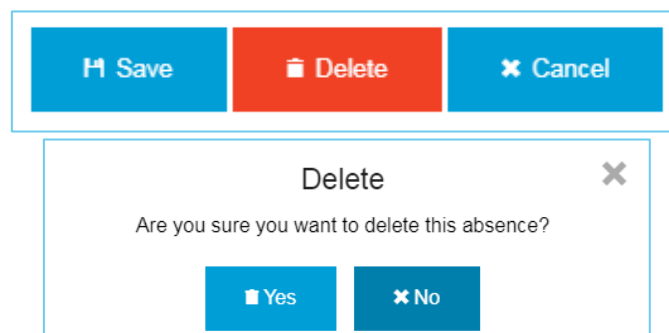
When creating an Absence event for a staff member who is assigned a shift on the rota, a message will be displayed at the point you Save the absence to the Staff Calendar. You have the option to remove the assigned staff member from the shift, for example if you're expecting the staff member to be absent for the whole shift, unassign the staff member to identify you have a deficit in your required staffing numbers for that time period. You will now have the ability to assign another staff member or cover/agency on the rota to ensure you maintain minimum levels of staffing on the shift.



Amending an Absence

Once an absence is recorded, it is possible to amend the detail to update the actual detail of a return to work. For example, where you have a staff member who has been absent through illness with no defined return to work, you may have previously set the 'Continued Absence' flag. The staff member has now returned to work and you want to set the end date.

- To amend an absence, locate the first date the absence occurs
- Click to open the Absence record
- Here you can make changes to the absence that may include:
 - Reason for absence is amended following a welfare call
 - The absence time has increased and change to a continue absence or the staff has returned to work and an absence date is set, the continued absence flag is unchecked.
 - A doctor's note is received
 - The number of authorised hours is changed
 - The absence is unauthorised
 - Further notes are recorded
 - You have assigned the wrong staff member
- Click Save to apply your changes or Cancel
- If an absence is recorded in error, you can delete the absence in its entirety click the Delete button. Select Yes or No to the resulting message.



Authorising Absences and Absence Hours

Once you have completed the absence details, you can mark each day of the absence as authorised or unauthorised, and enter the amount of absence hours per day. By default, all absences will be marked as unauthorised. When an absence is authorised, the absence event will display in the timesheets along with any notes and hours.

To mark an absence day as authorised or unauthorised, select the relevant option for each day within the absence days table at the top right of the page.

To enter or amend absence hours, enter the hours into the hours field for each day within the absence days table.

Once the absence record is complete click 'Save'

Edit Absence Record

Allocated Staff Required

When Required
 to

Reason Required

Continuing Absence
 Self Certified
 Doctors Note

Notes 0/2000

Date Notified

Date	Status		Hours
	Authorised	Unauthorised	
11/12/2018	<input checked="" type="radio"/>	<input type="radio"/>	12
12/12/2018	<input checked="" type="radio"/>	<input type="radio"/>	12
13/12/2018	<input type="radio"/>	<input checked="" type="radio"/>	0
14/12/2018	<input checked="" type="radio"/>	<input type="radio"/>	12
15/12/2018	<input type="radio"/>	<input checked="" type="radio"/>	0

Save
Delete
Cancel

Holiday

Holiday's in the calendar are used to manage and authorise holiday requests for staff members. Authorised holidays added to the calendar will appear within the staff members file and within the Holiday Details report. Authorised holiday hours will appear within the timesheets, payroll and update the rota.

Holiday requests, approved holiday and declined holiday is shown in the Staff Portal feature in the 'My Calendar' view.

Adding a Holiday

- From the Staff Calendar, click on the first date the holiday will start.
- Click 'Holiday Request'
- Choose the staff member from the drop-down list
- Enter the start and end dates in the when 'from – to' fields

Note the system has calculated the number of accrued hours available to take as holiday and displays the weekly contracted hours for the selected staff member along with the total entitlement of holiday hours for the year.

Accrued Entitlement 11.3 Hours (Current Year)	Total Entitlement 149 Hours (Current Year)
Contracted Hours 40 hours	

- Add any supporting notes
- All newly created holiday events are set to 'Requested'
- Should any of the holiday time requested span shifts that are assigned on the rota, the Hours field will be automatically populated on those assigned shift dates.
- Click Save

Authorising or Declining Holiday

Holiday requests can be authorised or declined depending on a number of factors including:

- Not sufficient staffing levels
- Not enough accrued hours
- Important training is scheduled

Similarly, to that of approving Absence, Holiday is authorised or declined in the same way.

- From the Staff Calendar, locate the first date of the holiday request and open the event
- In the right of the window, click to Authorise or Decline a series of dates or individual dates.
- Note, any assigned shift hours from the rota will be shown in the 'Hours' field
- If you currently do not use the Rota function, insert the number of authorised hours each day to ensure the holiday entitlement is affected and the timesheet updated.

Note the change of the holiday entitlement figures once the Authorised button is set.

VVHCH Required

19/03/2020 to 19/03/2020

Requested on 06/03/2020 at 11:54

<p>Accrued Entitlement</p> <p>11.3 Hours → 5.3 Hours</p> <p>(Current Year)</p>	<p>Total Entitlement</p> <p>149 Hours → 143 Hours</p> <p>(Current Year)</p>
<p>Contracted Hours</p> <p>40 hours</p>	

Handy Hint, to authorise or decline a series of dates, click the column header titles to quickly update the buttons.

If the Holiday request is declined, no changes are made to the Entitlement figure and the timesheet is not updated.

- Once the holiday record is complete, click 'Save'

Handy Hint: When authorising a Holiday, the Accrued Entitlement may reduce to a minus figure. The Total Entitlement cannot be exceeded unless you have applied settings to do so within the System Configuration.

Training

Staff training can be planned and managed within the calendar. Attended training will be added into staff members timesheets while achieved training will also be added into a staff members training record.

You can create a training event and schedule multiple staff to attend from one event. Training events can be single day events or part day events.

Training events are also visible in the Staff Portal, My Calendar view.

Adding Training

- From the Staff Calendar, click on the first day of the training event.
- Click 'Training'
- Enter the date that the training will occur and set the start and end times
- Select the Qualification that applies, for example Food Hygiene
- Set the duration – note this field will determine how many hours are copied to the Timesheet
- Enter any supporting notes

New Training Record

When Required

18/01/2019 09:00 to 17:00

Qualification Required

Dementia Awareness

Duration

07:00

[+ Add Staff Delegate](#)

Notes 22/2000

Break at 12:00 - 13:00

i Info - No delegates selected

[F1 Save](#)
[✕ Cancel](#)

- Click the 'Add Staff Delegate' button. Those staff who are required to complete the qualification as part of their role in the Home will be shown in the list.
 - Here you can select attendees from multiple Homes within the Group. From the Homes drop down list, choose the appropriate home to locate the delegate(s)
 - Sort by – here you will see a list of delegates either by name or by priority.
 - The name sorts the list by first name order
 - Priority will create a list of those staff members who have the training as a mandatory requirement but is yet unachieved or it is an expired qualification, thereafter, those who have the qualification as an optional requirement for their role will be shown.
 - Click the + button to add the delegate to the training., they will now appear on the right-hand pane
 - Click the – button in the right-hand pane to remove a delegate from the training
The delegate count will increase/decrease accordingly

Select Training Delegates

Home: Bury Lodge | Sort by: priority

Name	Requirement	Expiry
+ Erika Smith	Mandatory	Not achieved
+ Michael Peterson	Mandatory	Not achieved
+ Mischa English	Mandatory	Not achieved
+ Val Milton	Mandatory	Not achieved
+ Bob Bacon	Not required	03/12/2019
+ Donna Sikuade	Not required	
+ Lucy Ho	Not required	
+ Rebecca Greene	Not required	

+ Add | ✖ Cancel

Selected Delegates

4 selected

Home	Name
- Training Home	Em Mc
- Water Grange	Julie Haines
- Water Grange	Michelle Morley
- Waterfoot House	Jane Marchant

- Click Add to assign all the delegates to the training.
- Click Save to create the Training event in the Staff Calendar

Attendance Status

Once staff members have been added to a training record you can then manage each staff members attendance status from within the main training record. Information you can manage is:

- Date booked. The date the staff delegate was booked onto the training course. As a default this is set to today's date. It isn't usually the same date the course is scheduled for.
- Duration. Amend how long (in hours) the course duration. This information is carried through to the timesheet
- Status. Set here the current response from the Staff member to confirm/deny attendance to the training course.
 - Staff currently assigned to the rota during the course period, when changing the Status as 'confirmed' will result in this message:

Remove from rota shift ✖

Would you like to remove these staff members from all assigned shifts on 13/03/2020 from the rota?

- Here you have the ability to unassign staff from the rota if required. Delegates who have not confirmed attendance or denied the scheduled course will not be removed from the rota.
- Attended. Click to confirm the staff member did attend the training.

- Create Qualification. Click to confirm the staff member achieved the training objective and is now suitably qualified. The qualification detail will update the staff members record to show training is achieved
- Click the X button to remove the delegate from the training course
- Notes. Click the + button to add any supporting notes or feedback.
- Click Save

Once the record is saved, the timesheet will be updated with the attended hours.

Edit Training Record

When Required

05/12/2018 09:00 to 14:00

Notes 22/2000

Break at 12:00 - 13:00

Qualification Required

Dementia Awareness

Duration

05:00

[+ Add Staff Delegate](#)

Staff Name	Home	Date Booked	Duration	Status	Attended	Achieved	Notes
Em Mc	Training Home	15/01/2019	05:00	Pending	<input type="checkbox"/>	<input type="checkbox"/>	+ ✖
Julie Haines	Water Grange	15/01/2019	05:00	Confirmed	<input type="checkbox"/>	<input type="checkbox"/>	+ ✖
Michelle Morley	Water Grange	15/01/2019	05:00	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	+ ✖
Jane Marchant	Waterfoot House	15/01/2019	05:00	Confirmed	<input type="checkbox"/>	<input type="checkbox"/>	+ ✖

Total: 4 delegates

[F1 Save](#) [Delete](#) [Cancel](#)