

the complete guide to timesheets in CoolCare

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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.

To navigate to the timesheets:

- Log in to CoolCare
- Click **Staff** to open the staff section
- Select Timesheet

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

Timesheet

Choose Week

25/07/2022

31

Include staff with empty timesheets

Authorised

Manually Changed

Snapped to Shift

Not Snapped to Shift

Compare To Rota

Export

Forename ↑	Surname	Position	C	W	S	E	Mon 25/07/2022	Tue 26/07/2022	Wed 27/07/2022	Thu 28/07/2022	Fri 29/07/2022	Sat 30/07/2022	Sun 31/07/2022
Amanda	Becker	Care Assi...	30	22	22	0	1.5(T)		11		11		
Amelia	Watson	Senior Ca...	40	11	11	0	1.5(T)		11				
Catherine	Lawson	Nurse	20	0	0	0	1.5(T)						
Courtney	Wheeler	Care Assi...	28	22	22	0	11(H)	11(H)	11		11		
Emily	Galileo	Chef	26	0	0	0	1.5(T)						
Harry	Scott	Maintena...	30	0	0	0			8(A)				
Martin	Polder	Care Assi...	24	0	0	0					11(A)		
Nadine	Khan	Senior Ca...	32	0	0	0					12(H T)	11(H)	11(H)
Sanjita	Carr	Care Assi...	0	5	0	5			5(E)				
Sarah	Olson	Care Assi...	0	21	21	0			11		11(T)		
Todd	Ingram	Senior Ca...	32	22	22	0		11			11		
Tracy	Foreman	Nurse	20	0	0	0					1(T)		
Worked Hours Totals:				103	98	5	0	11	49	0	43	0	0

- 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:
 - 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)
 - Pink – the shift has been adjusted manually
 - Green – the shift has been authorised
- Additional codes will appear in brackets i.e., T for training, E for extra hours, H for holiday

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.

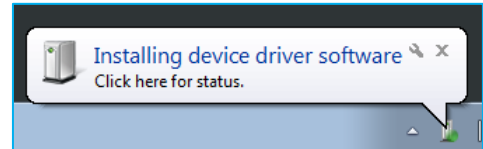
assigning an iButton

- 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** tab 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**



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	e10000122ddeb01	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 and clock history using the orange archive button on the Clock In/Out History.



snapping to shift

When a staff member clocks in and out CoolCare 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 manual clock should be added.

Emily Galileo 19/11/2020

Standard Hours: 13 CA

Extra Hours: 0 CA

Other Hours: 0

Notes 0/500

☐ Authorised

Clock Times	Hours Present (hh:mm)
8:00 IN 21:00 OUT	13:00

I1 Save + Add Event

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 the 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 records guide.

Emily Galileo 19/11/2020

Standard Hours: 13 CA

Extra Hours: 0 CA

Other Hours: 0

Notes 0/500

☒ Authorised

Clock Times	Hours Present (hh:mm)
8:00 IN 21:00 OUT	13:00

I1 Save + Add Event

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

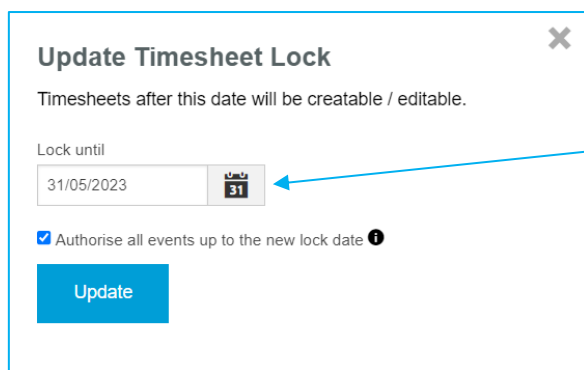
In order to keep Payroll accurate, you have the ability to lock the timesheets in CoolCare so that no other amendments can be made to them prior to a specified date.

locking the timesheets

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

unlocking the timesheets

- Navigate to the **Timesheet**
- Click on the padlock symbol in the top right of the timesheet
- Select the date of the day before you need to be unlocked and click **Update**



Update Timesheet Lock ✕

Timesheets after this date will be creatable / editable.

Lock until

31/05/2023

☒ Authorise all events up to the new lock date ⓘ

Update

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

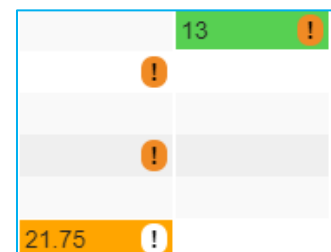
To unlock enter the day before you wish to edit

authorising timesheets in bulk

If you have permission to authorise timesheets, you will also be given the option to authorise all timesheet events up to the new lock date. If ticked, this option will authorise all the shifts on the timesheet on the locked dates, allowing you to authorise shifts in bulk.

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.



		13	!
	!		
	!		
21.75	!		

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 are 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

Emily Galileo

Start date: 01/11/2020
Covid-19 status: -
Position: CA at Sam R's Home
Payroll Number:

General T & A H.R. Payroll Training Documents

Individual Timesheet 02/11/2020 to 30/11/2020 Go

	Monday	Tuesday	Wednesday	Thursday
30 Nov - 06 Dec				
23 Nov - 29 Nov				
16 Nov - 22 Nov				13
09 Nov - 15 Nov				
02 Nov - 08 Nov				264 8.5(T)

Enter the start and end date to set the period you wish to view

You can view a shifts entry by clicking on the time block.

You cannot edit the time here. Only on the main timesheet

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**

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

To navigate to staff reports:

- Open the **Staff** section
- Click **Reports** 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.