

creating and amending staff records in coolcare.

The Staff Records section is where the details of your staff members are kept in CoolCare. As well as current staff member's records you can also access the records of any leavers. This guide will take you through creating and changing staff records, for more information on certain areas in staff records such as T&A, HR and training please use the specific guides.

navigating to staff records.

To access the Staff Records:

- Select **Staff** from the left-hand menu
- Select **Staff Records** from the list that appears

Pay No.	Full Name	Bank	Position	Start Date	Leave Date	Status
165234	Amelia Watson		Senior Carer	01/10/2021		IN
3234443322	Beth Lynch		Senior Carer	01/07/2023		OUT
1234	Billy Smith		Care Assistant	01/11/2022		OUT
938293832	Carol Wise		Senior Carer	02/01/2023		OUT
2455	Catherine Lawson		Nurse Day	01/11/2021		OUT
1565432	Claire Ennis		Nurse Day	11/07/2022		OUT

This will open your staff list, allowing you to see and search your staff records or insert new ones.

creating a new staff record.

For any new starters you will need to create a new staff record for them and fill in their details.

- Navigate to Staff Records
- Click **+Insert**

Pay No.	Full Name	Bank	Position
165234	Amelia Watson		Senior Carer
3234443322	Beth Lynch		Senior Carer

This will take you to the *New Staff Member Page*, here you can fill out the details of the new starter. The first page is *General*, the basic personal details of the staff member: There are some required fields:

- Forename
- Surname
- Date of Birth
- Title
- Sex

Underneath that are the *Address Details* and *Position Details*; *Address Details* are all optional, these can be input now or after the record is created. *Position Details* are required; these specify the staff member's role and hours in order to calculate their holiday entitlement:

- Default Position
- Bank Staff Position (Yes/No)
- Hours Per Week (Required if Bank Staff Position is No)
- Average Days Per Week (Required if Bank Staff Position is No)
- Holiday Entitlement (Days)
- Start Date

Please Note: Ensure these details are accurate when creating the staff record as they are used to calculate the staff member's holiday entitlement. They can be edited after creating the record, but any errors may result in staff members having more or less holiday entitlement than they should.

The second page is *UK Eligibility*, containing details regarding the staff member's eligibility to work within the UK if they are from outside the country. All fields on this page are optional and can be added after the record after it is created.

New Staff Member

GENERAL ✓ / ELIGIBILITY / EMPLOYMENT DETAILS

<p>Eligible to work in the UK</p> <div style="border: 1px solid #ccc; padding: 2px;">Unknown ▾</div> <p>Eligible by Whom</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>Status</p> <div style="border: 1px solid #ccc; padding: 2px;">- ▾</div> <p>Certificate of Sponsorship Number</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>Date Certificate Received</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p><input type="checkbox"/> Working Registration Scheme Required</p> <p>Visa Type</p> <div style="border: 1px solid #ccc; padding: 2px;">- ▾</div> <p>Visa Start Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>Visa Expiration Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>Conditions of Visa</p> <div style="border: 1px solid #ccc; height: 40px;"></div>
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The third and final page is *Employment Details*, containing a variety of information relating to the staff member's employment. These fields are also optional and can be filled in after the record once created.

New Staff Member

GENERAL ✓ / ELIGIBILITY ✓ / EMPLOYMENT DETAILS

<p>DBS</p> <p>Form Sent to DBS Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>DBS Issued Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>DBS Expiry Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p><input type="checkbox"/> Passed Police Check (DBS)</p> <p>DBS Status</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>DBS Reference Number</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Employment</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;"> <p>P45 Received Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> <td style="width: 33%;"> <p>Probation Length</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input style="width: 80%;" type="text"/> Months </div> </td> <td style="width: 33%;"></td> </tr> <tr> <td> <p>Notice Period</p> <div style="border: 1px solid #ccc; padding: 2px;">- ▾</div> </td> <td colspan="2"> <p>Probation End Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> </tr> <tr> <td> <p>Contract Returned Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> <td colspan="2"> <p><input type="checkbox"/> Passed Probation</p> </td> </tr> <tr> <td> <p>Induction Start Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> <td colspan="2"> <p>Probation Review Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> </tr> <tr> <td> <p>Induction End Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> <td colspan="2"> <p>Recruitment Source</p> <div style="border: 1px solid #ccc; height: 20px;"></div> </td> </tr> </table>	<p>P45 Received Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Probation Length</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input style="width: 80%;" type="text"/> Months </div>		<p>Notice Period</p> <div style="border: 1px solid #ccc; padding: 2px;">- ▾</div>	<p>Probation End Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>		<p>Contract Returned Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p><input type="checkbox"/> Passed Probation</p>		<p>Induction Start Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Probation Review Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>		<p>Induction End Date</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Recruitment Source</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	
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Once all pages have been filled out, click the **Save** button at the bottom of the page to create the staff record.

uploading a staff photo.

- Navigate to **Staff – Staff Records**
- Locate the staff member in the list or use the search box to find the record
- Click **Upload Photo**
- Locate the photo of the staff member you wish to upload on your computer
 - **Please Note:** The photo must be a .jpg or .jpeg file.
- Select the photo and click **Open**, the photo will be uploaded to the record and shown on-screen
- If you need to update the photo you can click **Change Photo** at any time

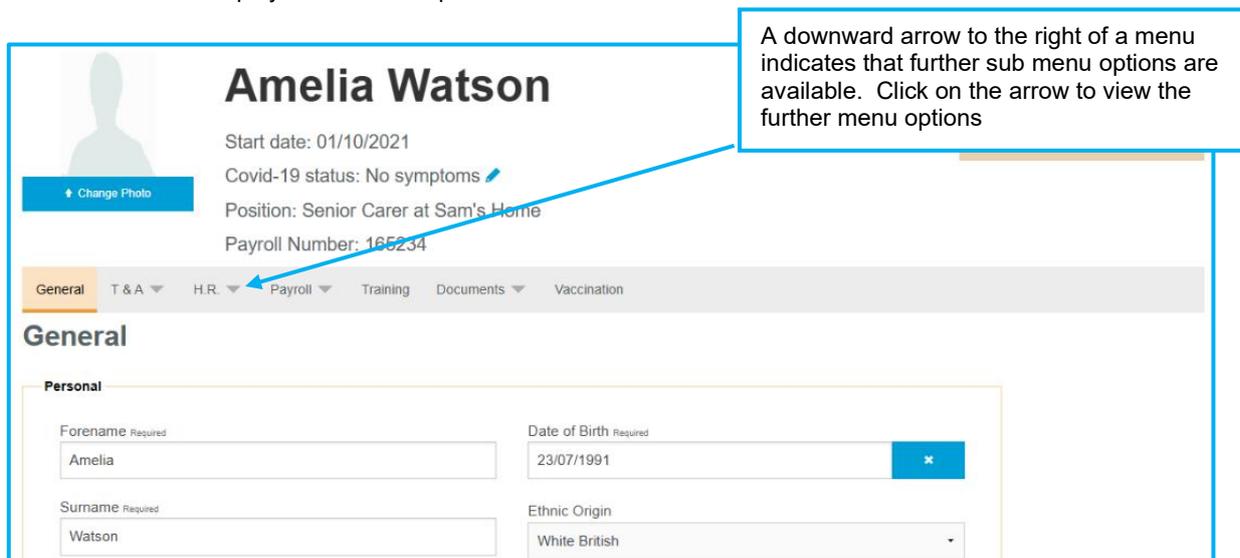


Please Note: If the uploaded photo is appearing sideways, check the orientation by opening the picture on your computer and edit/retake the picture if necessary.

amending staff details.

Once your staff details are added to CoolCare they are stored in the **General** page of the staff record. This is the first page that you see when opening a staff record. This contains their personal details such as their name and date of birth and their address details.

- Navigate to **Staff – Staff Records**
- Find the staff member's record you wish to change
- Click on the employee's name to open their full record



The staff record will open on the *General* page. Fields on this page include the staff member's name, date of birth, ethnicity, and other basic details. It also includes fields for the staff member's address as well as their marketing communication preferences, where you can choose if the staff member receives communications from CoolCare regarding our products and services. For further information on the other parts of the staff record, please see our other staff record guides.