

Creating and Amending Staff Records on CoolCare

The Staff Records section is where the staff record details are kept in CoolCare. As well as current staff member's records you can also access the records for 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 guide.

Navigating to Staff Records

To open the Staff Records section please follow the below steps:

- 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
1189	Andrea Smith-Davies		Care Assistant	30/01/2011		OUT
	Avril Turnet	B	Kitchen Assistant	16/05/1971		OUT
1167	Claire Miller		Supervisor	12/09/2015		OUT
1177	Dave Smith		Home Manager	12/04/2014		OUT
1192	Emaly Turner		Supervisor	14/12/2016		IN
1276	Christina Adamski		Supervisor	01/06/2015		OUT
1239	Graham Edwards		Care Assistant	12/04/2014		OUT
1245	Ian Thomas		Cook	12/09/2015		OUT

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
- Fill in the General page, click 'Next'
- Fill out the Eligibility page and click 'Next'
- Fill out the Employment Details page and click 'Save'.
-

If you need to go back at any time you can click the 'Previous' button.

Staff List

Current	Print	+ Insert	Import CSV
Pay No.	Full Name	Bank	Position
1189	Andrea Smith-Davies		Care Assistant
	Avril Turnet	B	Kitchen Assista
1167	Claire Miller		Supervisor

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

New Staff Member

GENERAL / ELIGIBILITY / EMPLOYMENT DETAILS

General

Forename Required
Surname Required
Maiden Name
Preferred Title
Disability
Gender

Date of Birth Required
Ethnic Origin Required
Marital Status Required
Title Required
Sex Required
Orientation
Religion

Required fields must be completed, other fields are optional.

Uploading a Staff Photo

- Click 'Staff' from the left-hand menu
- Select 'Staff Records' from the list
- Locate the staff member in the list or use the 'search by name' box on the screen.
- Click 'Upload Photo'
- Locate the photo of the staff member you wish to upload on your computer
- 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.

Note: The photo must be a .jpg or .jpeg file.



Mavis Brown

Start date: 05/03/2018

Position: Carer at Maple House

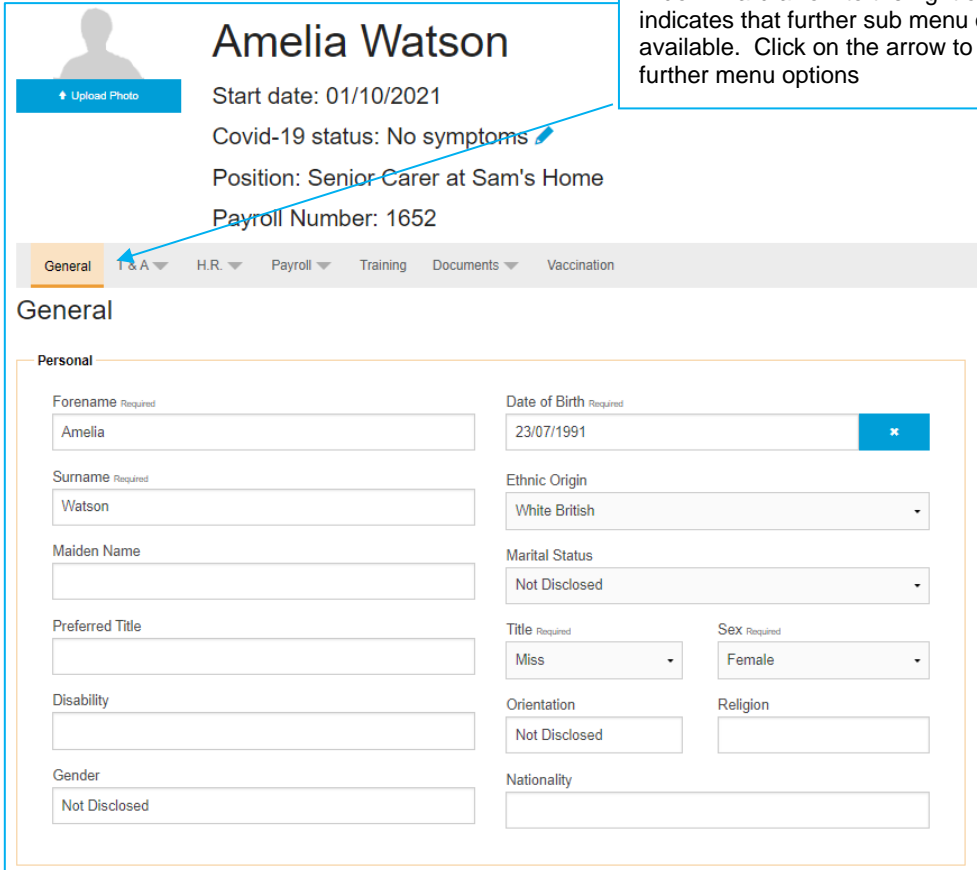
Payroll Number:

[Upload Photo](#)

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 member's file. This contains their personal details such as their name and date of birth and their address details.

- Click Staff from the left-hand menu, choose 'Staff Records' from the list
- Find the staff member's record you wish to change.
- Click on the employee's name to open their full record



Amelia Watson

Start date: 01/10/2021

Covid-19 status: No symptoms

Position: Senior Carer at Sam's Home

Payroll Number: 1652

[Upload Photo](#)

General | T & A | H.R. | Payroll | Training | Documents | Vaccination

General

Personal

Forename <small>Required</small> <input type="text" value="Amelia"/>	Date of Birth <small>Required</small> <input type="text" value="23/07/1991"/>
Surname <small>Required</small> <input type="text" value="Watson"/>	Ethnic Origin <input type="text" value="White British"/>
Maiden Name <input type="text"/>	Marital Status <input type="text" value="Not Disclosed"/>
Preferred Title <input type="text"/>	Title <small>Required</small> <input type="text" value="Miss"/>
Disability <input type="text"/>	Sex <small>Required</small> <input type="text" value="Female"/>
Gender <input type="text" value="Not Disclosed"/>	Orientation <input type="text" value="Not Disclosed"/>
	Religion <input type="text"/>
	Nationality <input type="text"/>

A downward arrow to the right of a menu indicates that further sub menu options are available. Click on the arrow to view the further menu options

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.