# 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



## 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

| Pay No. | Full Name | Bank | Position |
|---|---|---|---|
| 1189 | Andrea Smith-Davies | | Care Assistant |
| | Avril Turnet | B | Kitchen Assistant |
| 1167 | Claire Miller | | Supervisor |



### New Staff Member

GENERAL / ELIGIBILITY / EMPLOYMENT DETAILS

**General**

Required fields must be completed, other fields are optional.

Personal

Forename Required

Date of Birth Required

Surname Required

Ethnic Origin Required

Maiden Name

Marital Status Required

Preferred Title

Title Required

Sex Required

Disability

Orientation

Religion

Gender

# 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.

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**Mavis Brown**

Start date: 05/03/2018

Position: Carer at Maple House

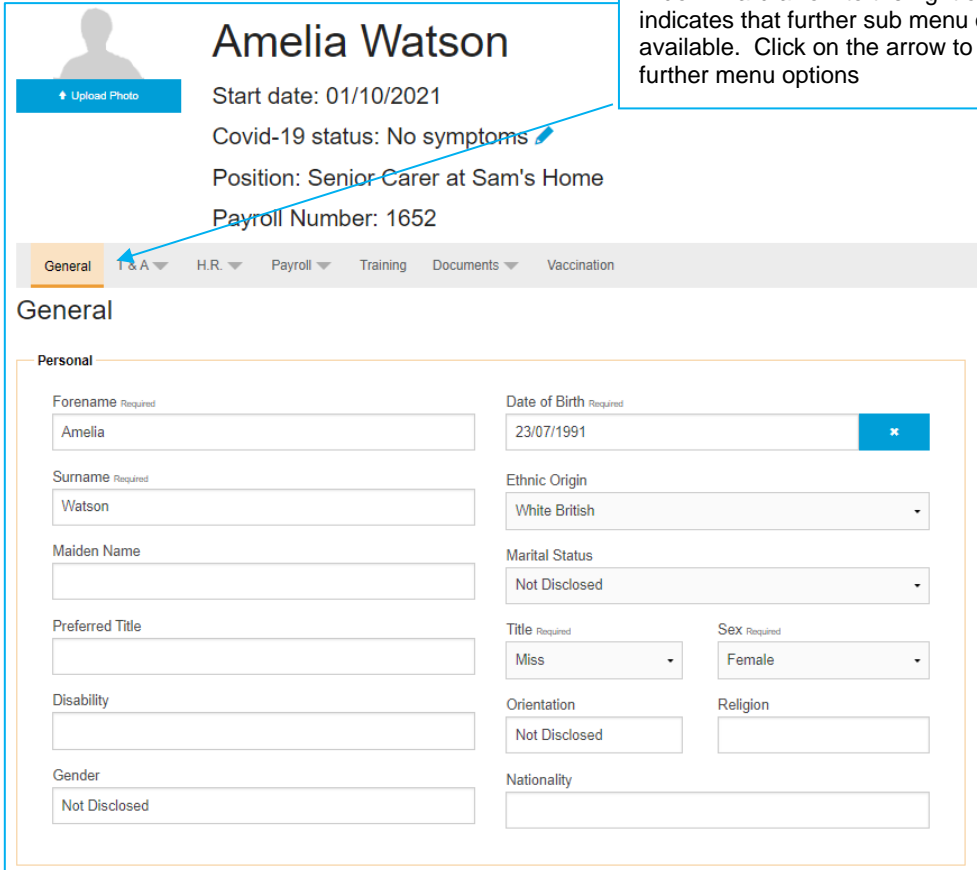Payroll Number:

# 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

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.

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