

creating, amending and deleting 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

Required fields must be completed, other fields are optional.

General

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.

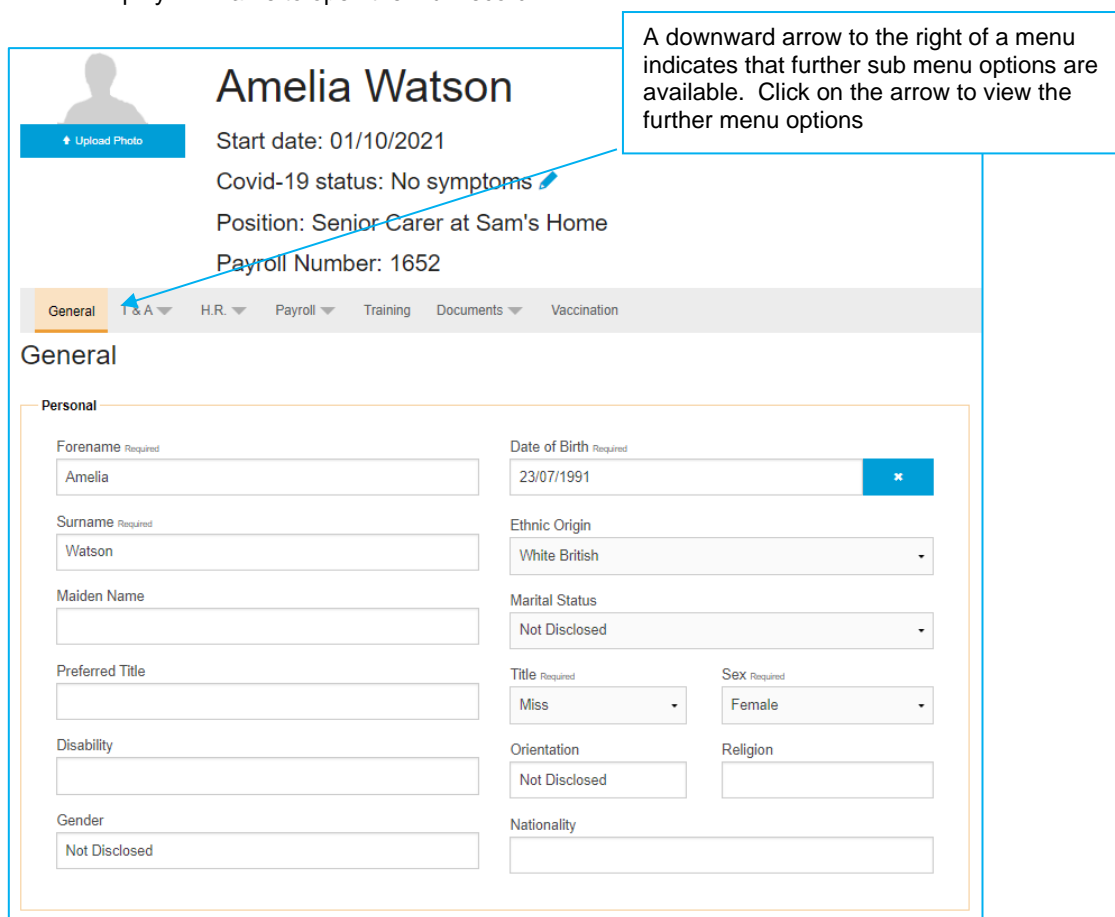



Mavis Brown
 Start date: 05/03/2018
 Position: Carer at Maple House
 Payroll Number:

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



Amelia Watson
 Start date: 01/10/2021
 Covid-19 status: No symptoms
 Position: Senior Carer at Sam's Home
 Payroll Number: 1652

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

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"/> <input type="button" value="x"/>	
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"/>	Sex <small>Required</small> <input type="text" value="Female"/>
Disability <input type="text"/>	Orientation <input type="text" value="Not Disclosed"/>	Religion <input type="text"/>
Gender <input type="text" value="Not Disclosed"/>	Nationality <input type="text"/>	

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.

deleting a member of staff

Before you decide to delete a member of staff you must set them as a leaver first, you can set the leaving date as straight away or for a date in the past or future. You can also add a reason for leaving for data purposes. Once a member of staff is set as a leaver you can delete at your convenience.

- Navigate to the staff record
- Click on to the HR from the top menu
- Click Positions and History
- Choose a Leave Date
- Select a Reason for Leaving
- Click Save

- Return to staff records (on left hand side of screen)
- Filter page by leavers
- Tick staff box on left hand side of screen
- Confirm deletion by clicking delete box

Pay No.	Full Name	Bank	Position	Start Date	Leave Date	Status
1259878787	Allan Jenkins		Chef	30/03/2020	16/11/2022	OUT
1478789877	Ally Ford		Senior Carer	14/12/2018	25/05/2023	OUT