

Staff Records HR on CoolCare

This guide will cover the HR staff area on CoolCare, including employment details, appraisals & supervisions, contacts, UK Eligibility and identification and forms. **Important, please check the Staff (HR) Positions and History guide for information on staff contracted hours, changing and adding extra positions and processing leavers.**

Employment Details

This section is used for storing information related to their employment not exclusive to and including what contracts they have signed and details regarding their DBS checks.

- From 'Staff Records' locate the Staff Record you wish to amend and click to open the record.
- Click on the 'H.R'. tab
- Choose 'Employment Details' from the drop-down list
- Complete or amend details as required
- Click 'Save'

The screenshot shows the 'Employment Details' form in the CoolCare HR system. The form is organized into several sections:

- DBS:** Includes fields for 'Form Sent to DBS Date', 'DBS Issued Date' (01/06/2022), 'DBS Expiry Date' (01/06/2025), a checked box for 'Passed Police Check (DBS)', 'DBS Status', and 'DBS Reference Number'.
- Registered Professional:** Includes 'Nurse Category' (N/A), 'Registered Pin Number', 'Pin Expiry Date', and 'Pin Check Date'.
- Employment:** Includes 'P45 Received Date', 'Notice Period' (2 Weeks), 'Contract Returned Date', 'Inductions Start Date', 'Portal Registration Code (Case-Sensitive)' (MDAwMDQ4), 'Probation Length' (6 Months), 'Probation End Date' (01/04/2022), a checked box for 'Passed Probation', 'Probation Review Date', 'Recruitment Source', and 'Portal Username' (Amelia.Watson). There is also a 'Reset Portal Password' button.
- Signed Contracts:** Includes checkboxes for 'Contract' (checked), 'Handling Form', 'Health and Safety Form', 'Fire Form', 'Stake Holder Pension Form', 'Health Care' (checked), 'Gifts Form', 'Disability', and 'ISA 1st Check'.
- Pay Details:** Includes checkboxes for 'Salaried' (checked) and 'In Pension Scheme', 'Salary' (with a pound sign), and 'Fixed Hours'.

Fields on this page include information around DBS checks, regular employment details such as probation period and notice period as well as the user's staff portal details if your site has that enabled. There are also sections for what contracts the staff member may have signed, registered professional fields if they are a nurse, and a check box to say if the staff member is salaried.

Appraisals and Supervisions

In CoolCare Appraisals and Supervisions are set to require renewal after a certain amount of time has passed, this is set in the System Configuration. You can record Appraisals and Supervisions and the completion date will automatically calculate when the next one is due. All the Appraisals and Supervisions created are stored on the Staff Record and can be viewed whenever required.

- Open Staff Member's record
- Click on the H.R. drop down on the top bar
- Click Appraisals & Supervisions

Recording Appraisals and Supervisions

- Open the Appraisals and Supervised Sessions page by following the navigation above
- Click Insert
- Select the type from the drop-down box
- Click in the Date Complete box and select the correct date from the calendar
- Click the Allocated Supervisor button
- Select the Supervisor from the list
- Tick the appropriate boxes
- Fill out any details of the Appraisal or Supervision
- Click Save

General	T & A	H.R.	Payroll	Training	Documents
Appraisals and Supervised Sessions					
+ Insert					
Next Supervised Session:		26/10/2018	Next Appraisal:		27/04/2019
Date Complete	Supervisor	Type			
27/04/2018	Avril Turnet	Supervised Session			
27/04/2018	Pietrek Shalkowski	Appraisal			
26/07/2018	Avril Turnet	Supervised Session			

Monitoring Appraisals and Supervisions Dashboard Widget

There is a Dashboard Widget that allows you to easily monitor your Appraisals and Supervisions, there are three flags for the Appraisals and Supervisions, Overdue, Due Soon and Due Today. To use this Widget, it will need to be selected on their user account which is done in the Manage Users section. See the Getting Set Up Guide for more information on giving widget access to users.

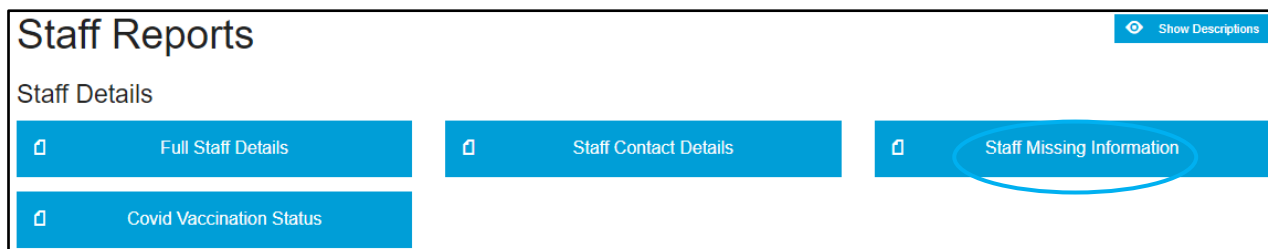
The Dashboard Widgets are located on the Dashboard screen, this is the first screen you will see when logging onto CoolCare. To get back to it at any time just click the Dashboard button on the left-hand bar, it is the top option above Care Home.

Monitoring Appraisals and Supervisions in Reports

Another method of Monitoring the Appraisals and Supervisions is by using the Staff Missing Information Report. This report will show any information missing from Staff Records such as them not having a DBS or a missing Registered Professional Pin Number, as well as missing items from the Staff Record the report will also state any overdue, due

soon and due today Appraisals and Supervisions. It also includes the date that they are due on the report, much like in the Dashboard Widget.

- Once logged into CoolCare click on the Staff Button
- Click Reports
- Click Staff Missing Information



Staff Contacts

Enter here contacts information for the staff member for example their Next of Kin, Doctor and Family.

Inserting a Contact

- Open the staff member's record
- Click on the 'H.R.' tab
- Choose 'Contacts' from the list
- Click 'Insert'
- Choose a 'Contact Type' from the list
- Enter the appropriate information
- Click 'Save'

Modifying a Contact

- Open the staff member's record
- Click on the 'H.R.' tab
- Choose 'Contacts' from the list
- Open the 'Contact' you wish to amend
- Change the details as required
- Click 'Save'

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

Edit Contact

Contact Details

Contact Type Required
Emergency Contact

Name Required
Ryan Watson

Address

Address 1
Address 2
Address 3
Address 4
Address 5

Marketing Communication Preferences

Consent provided to receive communications regarding our products and services/news/events/promotions via:

☐ Telephone
☐ Postal
☐ Email
☐ Fax

Communication Details

Email Address
Daytime Telephone
07238974623
Evening Telephone
Mobile
Relationship
Brother

← Back Save

For each contact the only required fields are contact type and name, however you input further details such as address and communication details such as a telephone numbers and email address. Similar to the staff member's general tab, there are also options for if the contact wants to be sent marketing information from CoolCare.

UK Working Eligibility

This section is used for recording the staff member's eligibility to work in the UK including if relevant details of their Visa.

- Open the staff member's record
- Click on the 'H.R' tab
- Choose 'UK Eligibility' from the list
- Complete the information as required
- Click 'Save'

General T & A **H.R.** Payroll Training Documents

UK Eligibility

Eligible to work in the UK
Unknown

Eligible by Whom
Status
-

Certificate of Sponsorship Number
Date Certificate Received

☐ Working Registration Scheme Required

Visa Type
-
Visa Start Date
Visa Expiration Date
Conditions of Visa

← Back Save

The fields on this page include whether or not the staff member is eligible to work in the UK, and any information relating to that. This includes their visa status, type, expiration date and conditions, as well as details regarding any certificate of sponsorship they may have.

Identification and Forms

This section is used for storing details on what forms have been returned and what identification was used to confirm their identity prior to their commencement of employment.

- Open the staff member's record
- Click on the 'H.R' tab
- Choose 'Identification/Forms'
- Complete the information as required
- Click 'Save'

The screenshot shows a web interface with a top navigation bar containing tabs: General, T & A, H.R. (selected), Payroll, Training, and Documents. Below the navigation bar, the page title is 'Identification and Forms'. The form is divided into two main sections: 'Returned Forms' and 'Identification'. The 'Returned Forms' section contains three columns of checkboxes and text fields. The first column has 'Date Joined' and 'CQC Information Date Sent' with corresponding text input fields. The second column has checkboxes for 'GSCS Received', 'Additional Information', 'Gaps in Employment', 'Working Time Directive', and 'Expression of Wish'. The third column has checkboxes for 'Member Handbook', 'Medical Form', 'Confidential Form', 'Opt Out', and 'Refused'. The 'Identification' section also has three columns. The first column has checkboxes for 'Birth Certificate', 'Driving Licence', 'Bank Statement', 'Utility Bill', and 'Other' with a corresponding text input field. The second column has a checkbox for 'ID Card' and a text input field for 'Expiry of ID Card'. The third column has a checkbox for 'Passport on File' and two text input fields for 'Passport Number' and 'Passport Expiry'. At the bottom of the form, there are two buttons: 'Back' and 'Save'.

The fields on this page are mostly check boxes for what forms the staff member may have filled in, there is also a free text field for you to add in any other that may not be included. It also includes fields for expiry dates for certain documents.