

staff training on CoolCare

A short guide on accessing your organisation's training record on CoolCare, including looking at individual records, adding training to records and viewing your training matrix report for CQC inspections.

training

The training tab is where you view a staff members required and achieved training. You can add new training to a staff record via the Insert button or through the calendar in Coolcare. You can also filter the training using the filter button at the top of the page, filtering by whether training is achieved, expired, or by its type (mandatory, additional).

Please view our Calendar guide for more information on adding training to staff through the calendar.

To view the training page.

- Go to staff records and choose a member of staff
- Choose training

Qualification	Date Achieved	Type	Expiry Date	Training Booked
Fire Drill Participation	Not Achieved	Mandatory	N/A	
Manual Handling	Not Achieved	Mandatory	N/A	
Moving & Handling of People	Not Achieved	Mandatory	N/A	
Dereks Training Course	Not Achieved	Mandatory	N/A	
Dementia Awareness	Not Achieved	Additional	N/A	
Safeguarding	Not Achieved	Additional	N/A	
Nutrition & Wellbeing	Not Achieved	Additional	N/A	
Medication Awareness	16/05/2022	Mandatory	16/05/2023	
Fire Safety	13/06/2022	Mandatory	13/06/2023	
First Aid Awareness	03/05/2022	Mandatory	03/05/2024	
Equality and Diversity	19/01/2022	Mandatory	19/01/2025	
Food Hygiene	10/05/2022	Mandatory	10/05/2025	
Infection	17/05/2022	Mandatory	17/05/2025	
Health & Safety	01/07/2022	Mandatory	01/07/2025	01/07/2022

Click here to add new training to the staff record.

To change a training record, click on to the training you'd like to amend. This is where you can add required dates and relevant notes.

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

New Training

Training Course Required
MCA & DoLS Awareness

Notes
0/4096

Date Commenced Required

Date Achieved Required

Back Save

training reports and widgets

The Training compliance widget available on the dashboard allows you to see your staff and how many training courses need to be taken and how many are booked compared to not booked. You'll also be able to see the number of courses that are about to expire. You can sort the widget by staff name or qualification.

Training Compliance						
Name	Incomplete Courses			Courses Expiring Soon		
	Not Booked	Booked	Total	Not Booked	Booked	Total
Amanda Becker	7	0	7	0	0	0
Amelia Watson	3	0	3	0	0	0
Catherine Lawson	3	0	3	0	0	0
Courtney Wheeler	3	0	3	0	0	0
Emily Galileo	3	0	3	0	0	0
George Moreton	5	0	5	0	0	0
Hannah Chau	8	0	8	0	0	0
Harry Jonson	6	0	6	0	0	0
Harry Scott	4	0	4	0	0	0

There are also three training reports, the training matrix, training exception and achieved training available in the Staff Reports area on CoolCare.

Training Reports	
Training Matrix	The training matrix displays each staff member within the home with each training course available, and marks each staff member as valid, expiring in the next two months, expired or unachieved with the date that the training has expired or is due to expire.
Training Exception Report	The training exception report lists staff members who are or soon will be non-compliant due to missing or expired qualifications. This report is available at home, group and company level.
Achieved Training	Provides a full qualification record for all staff of all training they have undertaken when in employment. The report includes all historical records for current staff and leavers.

training matrix report – handy tips

The training matrix report is a fantastic resource for CQC visits and when they need to see evidence of your training matrix. It shows all training that has expired, is due to expire soon and which training is still valid. You can view the report by qualifications and staff positions by changing these at the top of the report. If you want to view this report away from CoolCare we recommend transferring (copy and paste) to excel or a spreadsheet. The quickest way to do this is

- Open up your training matrix report
- Press “Ctrl and A” on your keyboard, to highlight all text
- Press “Ctrl C” to copy all text
- Open a new spreadsheet
- Press “Ctrl V” to paste in to spread sheet (see below screen shots)
- It should transfer into your spreadsheet, into the correct columns and colours.

Training Matrix - Sam's Home Total Valid: 19%

Include Absence: All Show Positions: All shown Show Qualifications: All shown

■ Expired
 ■ Expiring in next 2 months
 ■ Valid
 ■ Unachieved
 Cell Date = Training expired / will expire on
 N/A = Qualification not required for applied filters

Staff Member	Position	Start Date	Valid	Advanced Medication with Competencies	COSHH	Dementia Awareness	Derek Training	Dereks Training Course	Equality and Diversity	Fire Drill Participation	Fire Safety
				0%	0%	19%	0%	0%	10%	19%	100%
Miss Hannah Chau	Care Assistant Night	01/10/2020	11%								13/06/2023
Mr Matthew Patel	Kitchen Assistant	01/10/2020	6%								21/06/2023
Mr Todd Ingram	Senior Carer	01/10/2020	11%			27/05/2023					21/06/2023
Mrs Nora Harris	Care Assistant	01/11/2020	11%								21/06/2023
Mrs Nadine Khan	Senior Carer	01/11/2020	6%								29/07/2023

Staff Member	Position	Start Date	Valid	Dementia Awareness	Equality and Diversity	Fire Drill Participation	Fire Safety	First Aid Awareness
				7%	43%	29%	93%	54%
Miss Hannah Chau	Care Assistant Night	01/10/2020	33%		09/05/2026	12/12/2023	13/06/2023	10/03/2025
Mr Matthew Patel	Kitchen Assistant	01/10/2020	11%				21/06/2023	
Mr Todd Ingram	Senior Carer	01/10/2020	15%	27/05/2023			21/06/2023	
Mrs Nora Harris	Care Assistant	01/11/2020	15%				21/06/2023	10/03/2025
Mrs Nadine Khan	Senior Carer	01/11/2020	11%				29/07/2023	
Mrs Vicky Scorer	Care Assistant	01/11/2020	11%				21/06/2023	
Miss Courtney Wheeler	Care Assistant	01/11/2020	44%		19/01/2025	29/06/2023	27/10/2023	03/05/2024