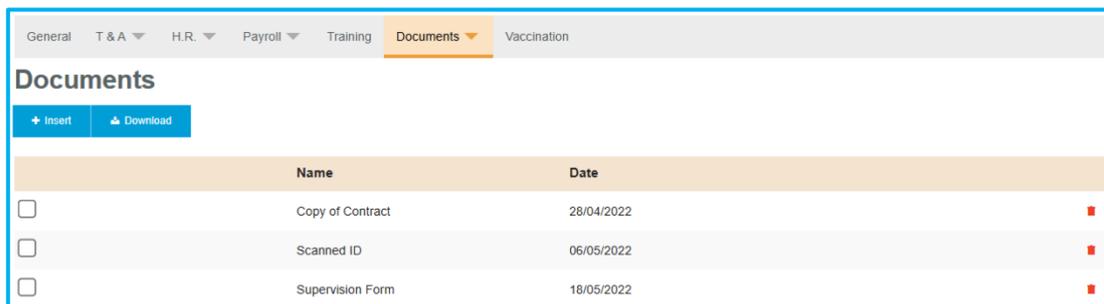# staff records – documents.

This guide covers the documents section of the staff record, looking at how to upload external documents to staff members on CoolCare, as well as the general notes page.

documents.

The documents section is where you upload any relevant documents to the staff record, for example a copy of their DBS certificate, forms filled during appraisals and supervisions, or even scanned copies of their ID. These are stored within CoolCare and can be downloaded from the system at any time.
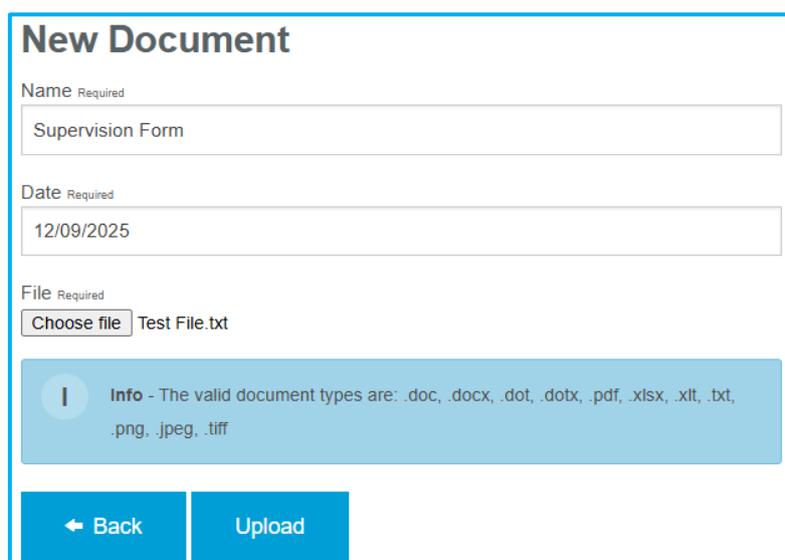
- Navigate to **Staff** – **Staff Records**
- Select the staff member you wish to view
- Select **Documents** – **Documents**

uploading documents.

- Navigate to the documents page on the staff record
- Select **+Insert**
- Enter the document's **Name**
- Select the **Date** the document was created
- Select **Choose File** and select the file from your computer
  - Only certain file types can be uploaded please see the *Info* box on the upload page for a full list of accepted files
- Select **Open**
- Select **Upload**

downloading documents.

- Navigate to the documents page on the staff record
- Tick the box next to the document you want to download
- Select **Download**
- A copy of the document will be downloaded and save to your computer

general notes.

Under the documents tab, you'll also find an option to add notes to a staff record via **General Notes**. This page is useful to store any additional information relating to the staff member that CoolCare does not have a specific field or page for.

- Navigate to **Staff** – **Staff Records**
- Select the staff member you wish to view
- Select **Documents** – **General Notes**

The general notes page is a large text box for you to type in whatever notes you may have. This can then be saved, edited and added to whenever you need to.

Please Note: This page has a limit of 4000 characters; if you ever meet this limit and need to add more notes, we recommend copying the existing notes into a word document or text file, uploading that as a document, and then emptying the general notes page, freeing up space to add any further notes.