

staff records – hr.

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. To access this page:

- Navigate to the staff record
- Select the **H.R. – Employment Details**

The screenshot shows the 'Employment Details' page in the CoolCare HR system. The navigation bar at the top includes 'General', 'T & A', 'H.R.', 'Payroll', 'Training', 'Documents', and 'Vaccination'. The 'H.R.' tab is selected.

DBS

- Form Sent to DBS Date: [Text Field]
- DBS Issued Date: 01/06/2022
- DBS Expiry Date: 01/06/2027
- Passed Police Check (DBS)
- DBS Status: [Text Field]
- DBS Reference Number: [Text Field]

Registered Professional

- Nurse Category: N/A
- Registered Pin Number: [Text Field]
- Pin Expiry Date: [Text Field]
- Pin Check Date: [Text Field]

Employment

- P45 Received Date: [Text Field]
- Probation Length: 6 Months
- Notice Period: 2 Weeks
- Probation End Date: 01/04/2022
- Contract Returned Date: [Text Field]
- Passed Probation
- Probation Review Date: [Text Field]
- Induction Start Date: 01/10/2021
- Induction End Date: 31/10/2021
- Recruitment Source: [Text Field]
- Portal Registration Code (Case-Sensitive): MDawMDQ4
- Portal Username: Amelia.Watson
- [Reset Portal Password](#)

Signed Contracts

- Contract
- Handling Form
- Health and Safety Form
- Fire Form
- Stake Holder Pension Form
- Health Care
- Gifts Form
- Disability
- ISA 1st Check

Pay Details

- Salaried
- In Pension Scheme
- Salary: £ [Text Field]
- Fixed Hours: [Text Field]

Fields on this page include information regarding DBS checks and registered nurse details, regular employment details such as probation period and notice period as well as the staff member's staff portal details. There are also sections for what contracts the staff member may have signed, as well as staff salary details.

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 annual appraisals and regular 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.

- Navigate to the staff record
- Select **H.R. – Appraisals & Supervisions**

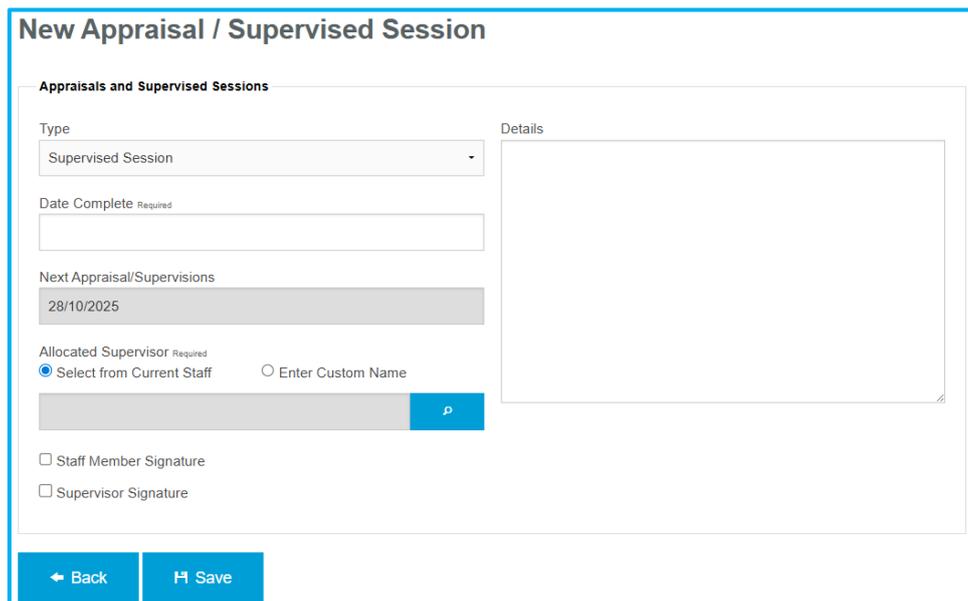


Date Complete	Supervisor	Type
27/04/2022	Mr Samuel Reynolds	Supervised Session
27/07/2022	Mr Samuel Reynolds	Supervised Session
21/10/2022	Mr Samuel Reynolds	Appraisal
27/10/2022	Mr Samuel Reynolds	Supervised Session

The page will show you when the next supervision and appraisal is due for the staff member, as well as all the previous appraisals and supervisions they've had.

recording appraisals and supervisions.

- Click **+Insert**
- Select the **Type** from the drop-down box (*Appraisal or Supervised Session*)
- Add the **Date Complete**
 - This will automatically fill in the **Next Appraisal/Supervisions** field
- Choose the **Allocated Supervisor**
 - You can either **Select from Current Staff** using the search icon or **Enter Custom Name** and type in the field
- Tick if you have the **Staff Member Signature** and **Supervisor Signature**.
- Add any additional notes to the **Details** box
- Click **Save** to finish



New Appraisal / Supervised Session

Appraisals and Supervised Sessions

Type: Supervised Session

Date Complete Required

Next Appraisal/Supervisions: 28/10/2025

Allocated Supervisor Required

Select from Current Staff Enter Custom Name

Staff Member Signature

Supervisor Signature

Details

← Back Save

monitoring appraisals and supervisions in dashboard.

There is a dashboard widget that allows you to easily monitor your appraisals and supervisions, showing any upcoming due appraisals or supervisions and colour coding them based on whether they are upcoming, due today, or overdue. To use this widget, it will need to be enabled on the user, which is done in the **Manage Users** section. Please see our *Getting Set Up* guide for more information on enabling widgets for users.

Staff Appraisals/Supervisions (Overdue: 17, Due Today: 0, Due Soon: 5)					
Courtney	Wheeler	Supervision	Overdue	27/08/2025	
Matthew	Patel	Supervision	Overdue	28/08/2025	
Carol	Wise	Supervision	Overdue	28/08/2025	
Deborah	Cole	Supervision	Overdue	02/09/2025	
Harry	Scott	Supervision	Overdue	04/09/2025	
Martin	Polder	Appraisal	Overdue	06/09/2025	
Catherine	Lawson	Supervision	Due Soon	10/09/2025	Maternity
Emily	Galileo	Supervision	Due Soon	11/09/2025	
George	Moreton	Supervision	Due Soon	12/09/2025	
Julia	Strong	Supervision	Due Soon	15/09/2025	
Nora	Harris	Supervision	Due Soon	16/09/2025	

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 upcoming or overdue appraisals and supervisions, including the date they were due.

- Navigate to **Staff - Reports**
- Select **Staff Missing Information**

Staff Reports Show Descriptions

Staff Details

Full Staff Details

Staff Contact Details

Staff Missing Information

Appraisal & Supervised Sessions

Covid Vaccination Status

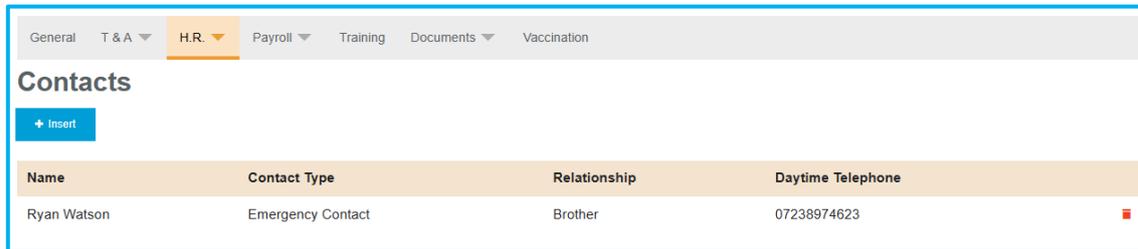
The report will display all staff members; if they have an upcoming or overdue supervision or appraisal, it will display under the exceptions.

	Mrs Deborah Cole	Care Assistant	10/02/1999	02/06/2025
Exceptions:				
<u>Reason</u>				
Supervised Session Due 02/09/2025				

staff contacts.

Every staff record can have external contacts added to it, allowing you keep track of anyone you'd need to get in touch with on behalf of the staff member. This could be an emergency contact, family member, even a reference for new staff.

- Navigate to the staff record
- Select **H.R. – Contacts**



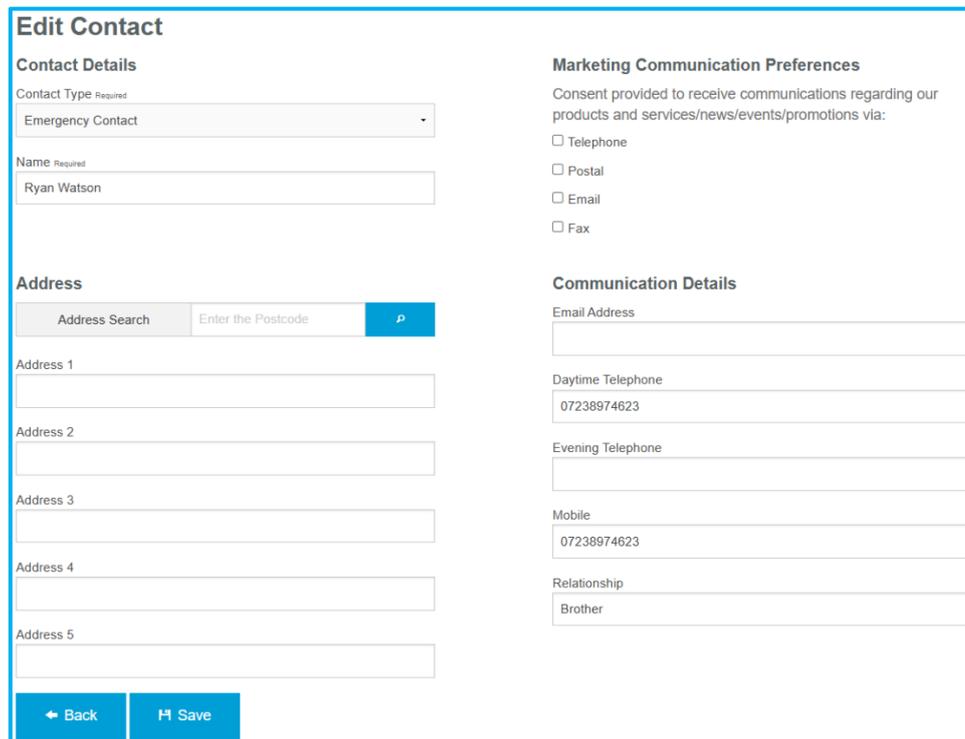
Name	Contact Type	Relationship	Daytime Telephone
Ryan Watson	Emergency Contact	Brother	07238974623

adding a new contact.

- Click **+Insert**
- Choose a **Contact Type** from the list
 - The list includes different relations, including emergency contact, next of kin or reference
- Fill in whatever **Address** and **Communication Details** you require
 - It is recommended to fill in the **Daytime Telephone** number, as this displays on the contact list
- Click **Save** to finish

editing a contact

- Open the contact you wish to amend
- Update any details as required
- Click **Save** to finish



Edit Contact

Contact Details

Contact Type Required
Emergency Contact

Name Required
Ryan Watson

Address

Address Search | Enter the Postcode | **P**

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
07238974623
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 eligibility.

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

- Navigate to the staff record
- Select **H.R. – UK Eligibility**

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

UK Eligibility

Eligible to work in the UK
Eligible

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

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.

- Navigate to the staff record
- Select **H.R. – Identification / Forms**

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

Identification and Forms

Returned Forms

Date Joined

CQC Information Date Sent

GSCS Received
 Additional Information
 Gaps in Employment
 Working Time Directive
 Expression of Wish

Member Handbook
 Medical Form
 Confidential Form
 Opt Out
 Refused

Identification

Birth Certificate
 Driving Licence
 Bank Statement
 Utility Bill

ID Card
Expiry of ID Card

Passport on File
Passport Number
Passport Expiry

Other

Previous Name

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.