

staff records – positions and history.

This guide will cover the final part of the HR staff area on CoolCare which is positions and history. This includes changing the main position for your staff and any adding extra positions (job roles) they have across your business. We'll also look at transferring staff to another home and process and viewing leavers.

position and contracted hours.

This section is where you can edit the main position of the staff member and any additional positions they may have within the current home or another home that is part of your group. It is also where you would process them as a leaver. All records entered in here link with the payroll, holidays, timesheets, rota and calendar records. If an extra position has not been entered here, they will not be able to cover shifts for that position in the rota or timesheets.

- Navigate to the staff record
- Select **H.R. – Positions and History**

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Positions and History

[+ Insert](#)

Date Effective	Position	Dept.	Payroll Number	Bank/Perm	Hours Per Week	Created / Changed By	Created / Changed Date
01/06/2025	Senior Carer	Care	1356	Perm	30.00	Sam Reynolds	28/05/2025
27/05/2022	Care Assistant	Care	1356	Perm	28.00	Sam Reynolds	27/05/2022
01/04/2022	Care Assistant	Care	1356	Perm	34.00	Sam Reynolds	29/04/2022
01/11/2020	Care Assistant	Care	1356	Perm	30.00	Sam Reynolds	29/04/2022

Employment Details

Start Date: 01/11/2020

Leave Date: *

Reason For Leaving:

Introduced By:

Group Supervisor Fire Marshal
 Team Leader First Aider

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Other Positions

[+ Add Extra Position](#)

Care Assistant Night [✎](#)
Sam's Home
Start Date: 01/04/2022

RGN [✎](#)
Sam's Home
Start Date: 27/05/2022

Care Assistant [✎](#)
Derek's Home (Home Default)
Start Date: 27/05/2022

adding a new contract change.

Should a staff member change their contract, here you will record the new contract details.

- Navigate to the staff record
- Select **H.R. – Positions and History**
- Click **+Insert** at the top of the page

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New Position and Hours Record

Warning - Adding additional position and hours records will lock down previous position and hours record and staff member's start date

Position Required
Care Assistant

Date Effective Required
08/09/2025

Bank Staff Position

Hours Per Week Required
42

Average Days Per Week Required
5

Holiday Entitlement (days) Required
28

Payroll Number
1356

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- Select the **Position**
- Enter the **Date Effective** of the contract change
- If the contract is bank, tick the **Bank Staff Position** option
- If the contract has contracted hours, add them to the **Hours Per Week** field
- Add the **Average Days Per Week** for the contracted hours
- Enter the **Holiday Entitlement** in days
- Click **Save**
- An additional warning message will appear; select **Yes** to confirm you want to make this change

Warning

Timesheets standard and extra positions will be updated for **Courtney Wheeler** to reflect this contract change.

Miss Courtney Wheeler will be unassigned from any shift patterns and shifts associated with **Senior Carer** after **08/09/2025** on the rota.

Would you like to make this change?

[✓ Yes](#) [✗ No](#)

Please Note: When a new contract has been inserted all previous contracts will be locked down and unable to be edited. If you need to correct an error on the latest position entered do not insert a new contract, you can amend the current contract.

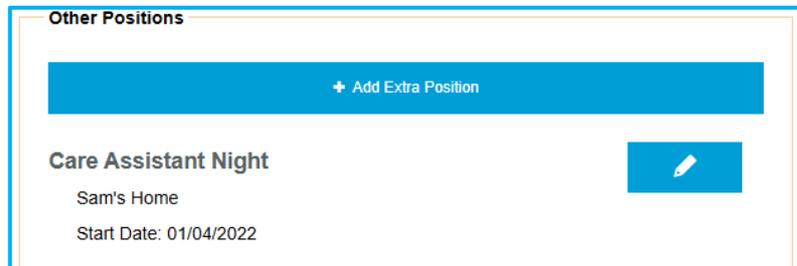
extra positions/pool staff.

If you have staff members who work multiple roles in the company, these can be added to their staff record on this page. A start date can be entered on the extra positions that they can work, allowing them to be assigned to an empty shift in the rota or have hours added onto a timesheet for these positions.

Please refer to our *Rota Management* and *Complete Timesheet* guides for more details.

adding extra positions.

- Navigate to the staff record
- Select **H.R. – Positions and History**
- Select **+ Add Extra Position**
- Select the **Start Date**
- Select the **Home** the extra position is for
- Select the **Extra Position** from the list
- Click **Save**



The screenshot shows a section titled "Other Positions". At the top, there is a blue button labeled "+ Add Extra Position". Below this, there is a list item for "Care Assistant Night". Underneath the position name, it says "Sam's Home" and "Start Date: 01/04/2022". To the right of the position name, there is a blue button with a white pencil icon, indicating an edit function.

ending extra positions.

- Navigate to the staff record
- Select **H.R. – Positions and History**
- Click the edit button on the position you are ending
- Enter the **End Date**
- Click **Save**
- A warning box will appear, select **Yes** to confirm



The screenshot shows a warning dialog box with a close button (X) in the top right corner. The title is "Warning". The main text reads: "Miss Courtney Wheeler will be unassigned from all shifts associated with Care Assistant Night after 09/09/2025. Are you sure you want to end the position?". At the bottom, there are two buttons: "Yes" with a checkmark icon and "No" with an X icon.

processing leavers.

- Navigate to the staff record
- Select **H.R. – Positions and History**
- Select the **Leave Date** field to add an end date
- Select a **Reason For Leaving** from the list
- Click **Save**

Once made a leaver, the page will also include how much holiday entitlement the staff member has remaining as of their leave date.



The screenshot shows a form titled "Employment Details". It has three main sections: "Start Date" with the value "01/11/2020"; "Leave Date" with a text input field containing "12/09/2025" and a blue button with an X icon; and "Reason For Leaving" with a dropdown menu showing "Retirement".

Please Note: If the leave date is set in the future, they will still show up in the current staff list until the date they leave.

transferring staff.

If you have a staff member leaving your home to work at another home within your group you can transfer their staff record, making them a leaver on your home and creating a new staff record with their information in the home they are transferred to.

- Navigate to the staff record
- Select **H.R. – Positions and History**
- In the Employment Details box, click the purple **Transfer** button
- Select the **Home** the staff record is to be transferred to
- Select the **Position** the staff member will have in that home
- Select the **Transfer Date** – this will be the staff member's leave date for their current record in this home
- Click **Save**

Transfer Staff to New Home

Warning - This will set an end date for the staff member and remove all timesheet events and unassign rota planned shifts after the transfer date.

Home: Home 2

Position: Care Assistant

Transfer Date: 09/09/2025

Save

Please Note: When transferring a staff record, it will use their original start date as the transferred record's start date, not the date of transfer. If you want the start date to reflect their new start date based on the transfer date, this will need changing manually on the staff record.

Please Note: A transferred staff member's holiday entitlement will not include any holiday that has already been used. This will need amending manually on the staff record via T&A – Holidays. For more information on adjusting holiday entitlement, please see our guide *Managing Holiday Entitlement*.

leavers list.

The leavers list is where all the staff members who have left are stored in case you need to access their record.

- Navigate to **Staff – Staff Records**
- Select the dropdown box at the top
- Select **Leavers**

Staff List

Leavers (dropdown): Current, Leavers, Current bank, All

Buttons: Print, Insert, Delete, Import CSV

Search: search by name

Full Name	Bank	Position	Start Date	Leave Date	Status
Amanda Becker		Care Assistant	01/05/2022	21/09/2023	OUT
Amanda Swift		Senior Carer	01/10/2024	02/10/2024	OUT
000001 Bela Doyle		Home Manager	01/01/2022	02/01/2023	OUT
3234443322 Beth Lynch		Senior Carer	01/07/2023	02/05/2025	OUT

Please Note: The staff list will always display the current staff when you open it regardless of what you were viewing before.