

staff records – training.

This short guide on accessing your staff members' training records on CoolCare includes looking at individual records, adding training to records and viewing your training matrix report for a wider, organisational view of training.

current 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 this page 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, required or booked, and by its type (e.g. mandatory).

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

To view the training page:

- Navigate to the staff record
- Select **Training**

The page will show you a list of training previously done by the staff member as well as any training set as mandatory for their main position that has yet to be completed.

Qualification	Date Achieved	Type	Expiry Date	Training Booked
Food Hygiene	10/05/2022	Mandatory	10/05/2025	<input type="checkbox"/>
Manual Handling	25/07/2022	Mandatory	25/07/2025	<input type="checkbox"/>
MCA & DoLS Awareness	06/09/2024	Mandatory	06/09/2025	<input type="checkbox"/>
Moving & Handling of People	31/10/2022	Mandatory	31/10/2025	<input type="checkbox"/>
Dementia Awareness	19/11/2024	Mandatory	19/11/2025	<input type="checkbox"/>
Fire Drill Participation	11/12/2024	Mandatory	11/12/2025	<input type="checkbox"/>
First Aid Awareness	22/01/2024	Mandatory	22/01/2026	<input type="checkbox"/>
Nutrition & Wellbeing	01/02/2023	Mandatory	01/02/2026	<input type="checkbox"/>
Test Course	06/03/2025	Mandatory	06/03/2026	<input type="checkbox"/>

adding new training.

You can add any new training done to the staff record by clicking the **+Insert** button at the top of the training list or by selecting any incomplete training course and then filling out the details of the completed training.

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

New Training

Training Course Required
Coolcare Training

Date Commenced Required

Date Achieved Required

Notes 0/4096

monitoring training via the dashboard.

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.

Name	Training Compliance					
	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

training reports.

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

The training matrix report is a fantastic resource to monitor and show evidence of completed, incomplete or overdue training. It shows all training that has expired, is due to expire soon and which training is still valid. You can filter the report by qualifications and staff positions by changing these at the top of the report. While the report does not export directly from CoolCare, it can be copied and pasted in to excel or similar spreadsheets.

- Open the training matrix report
- Filter the report by qualification and staff position if required
- Click and drag to highlight some data, or use **Ctrl + A** to select all on screen
- Press **Ctrl + C** to copy the data
- Open a new spreadsheet where you want to paste the data to
- Press **Ctrl + V** to paste the data into the spreadsheet
- The selected data should paste into the spreadsheet with the formatting and colour coding copied as well

Training Matrix - Sam's Home Total Valid: 65% Include Absence: All Show Positions: 1 shown Show Qualifications: All Mandatory

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

Staff Member	Position	Start Date	Valid	Equality and Diversity	Fire Drill Participation	Fire Safety	First Aid Awareness	Food Hygiene	Health & Safety	Infection	Kitchen Awareness	MCA & DoLS Awareness
Miss Courtney Wheeler	Care Assistant	31/11/2020	23%	31/01/2024	28/10/2024	02/06/2024						
Mrs Sarah Olson	Care Assistant	25/10/2021	25%	21/03/2027	24/10/2025	09/05/2026						
Mrs Vicki Scorer	Care Assistant	31/11/2020	75%		24/10/2025	16/07/2026						
Mrs Nora Harris	Care Assistant	31/11/2020	75%	28/07/2025	30/04/2026	16/04/2026						
Dr Billy Smith	Care Assistant	31/11/2022	32%	08/08/2025	25/10/2025	08/08/2025						
Ms Julia Strong	Care Assistant	20/03/2021	23%	24/07/2026	30/04/2026	22/04/2026						
Mrs Hilma Connors	Care Assistant	31/04/2021	75%	28/07/2026	30/04/2026	18/07/2026						
Miss Maria Walker	Care Assistant	22/04/2021	58%	15/07/2023		22/04/2023						
Mrs Melissa Blair	Care Assistant	17/04/2021	50%	15/07/2023		22/04/2023						
Miss Leah Spencer	Care Assistant	30/05/2021	58%	16/02/2024		08/06/2024						
Miss Jade Heath	Care Assistant	29/05/2021	58%	20/01/2023		09/05/2023						
Mrs Deborah Cole	Care Assistant	07/06/2021	58%	12/03/2023		02/06/2023						