

Staff (HR) Positions and History on CoolCare

This guide will cover the final part of the HR staff area on CoolCare which is positions and history. This includes adding entering the main position for your staff and any 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 enter 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.

- Open the Staff Record
- Click on the 'H.R.' tab
- Choose 'Positions and Hours' from the drop-down list.

The current position details can be viewed by selecting the top row. To make a contract change e.g., reducing hours, changing position, click Insert.

Date Effective	Position	Dept.	Payroll Number	Bank/Perm	Hours Per Week	Created / Changed By	Created / Changed Date
01/06/2022	Senior Carer	Care	1652	Perm	40.00	Sam Reynolds	14/06/2022
01/05/2022	Senior Carer	Care	1652	Perm	34.00	Sam Reynolds	06/05/2022
01/04/2022	Senior Carer	Care	1652	Perm	34.00	Sam Reynolds	06/05/2022
01/10/2021	Senior Carer	Care	1652	Perm	32.00	Sam Reynolds	22/06/2022

Employment Details

Start Date: 01/10/2021

Leave Date:

Reason For Leaving:

Introduced By:

☐ Group Supervisor ☐ Fire Marshal

☐ Team Leader ☐ First Alder

Other Positions

Care Assistant
Sam's Home
Started: 01 April 2022

Senior Carer
Derek's Home (Home Default)
Started: 11 May

Add extra position here:
Click Add Extra Position
Choose position and add an effective date

Adding a New Contract Change

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

- Open the Staff Record

- Click on the 'H.R.' tab
- Choose 'Positions and Hours' from the list
- Click 'Insert'

Select the position from the list

Enter the date effective, this is the date the new contract applies

- Enter the contracted hours in the 'Hours Per Week' box
- Enter the 'Holiday Entitlement' (this is in days)
- Click Save
- A warning message is displayed, click 'Yes or No' to affect timesheets

Warning

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

Miss Georgina Black will be unassigned from any shift patterns and shifts associated with **CA** after **13/01/2021** on the rota.

Would you like to make this change?

✓ Yes
✗ No

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, amend the current contract.

Extra Positions/Pool Staff

If you have staff members who are qualified to work an extra position, this can be recorded and assigned to shifts. A start date can be entered on the positions that they can work, this will allow them to be assigned to an empty shift in the Rota or inserted onto a Timesheet from this date.

Refer to 'Rota and Timesheet' guides for more details

Adding Extra Positions

- Open the 'Staff Record' for the appropriate staff member
- Click on the 'H.R.' tab
- Choose 'Positions and Hours' from the list
- Click 'Add Extra Position'
- Select the Date Effective
- Select from the 'Home' list which home this extra position applies.
- Select the Extra Position from the dropdown list
- Click Select

Other Positions

+ Add Extra Position

Nurse

Sam R's Home

Started: 01 January 2021

Ending Extra Positions

- Open the 'Staff Record' for the appropriate staff member
- Click on the 'H.R.' tab
- Choose 'Positions and Hours' from the list
- Click the edit button on the position you are ending
- Enter in the position end date in the 'Ended' field

- Click Save
- Choose the appropriate response to the warning message displayed to affect the timesheet.

Warning

Georgina Black will be unassigned from all shifts associated with **Nurse** after **08/01/2021**

Are you sure you want to end the position?

✓ Yes

✗ No

Processing Leavers

- Navigate to the staff record
- Click on the H.R. dropdown on the top bar
- Click Positions and Hours
- Click in the End Date box and select the date
- Select a reason for leaving from the dropdown box
- Click Save

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

Employment Details

Start Date: 01/11/2020

Leave Date
23/06/2022

Reason For Leaving
Personal Reasons

Introduced By

☐ Group Supervisor
☐ Fire Marshal

☐ Team Leader
☐ First Aider

Back

Save

Transfer

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.

Handy Hint: All transferred staff will remain in their current home until midnight, any change in CoolCare will show after this time. Please do not put through a transfer more than once as this will create duplicates.

Handy Hint: When transferring staff between homes holiday entitlement will NOT transfer across.

- Open the staff record
- Navigate to HR – Positions & 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 date of transfer – this will be your leave date in this home and the start date in the new home
- Click Save

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Transfer Staff to New Home

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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

Derek's Home

Position

Care Assistant

Transfer Date

23/06/2022

31

Save

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 the Staff Records page
- Click on the dropdown box at the top
- Select Leavers

Please Note: The Staff Records page will always display the Current Staff when you open it regardless of what you were viewing before.