

# staff calendar in coolcare.

## introduction.

The staff calendar feature enables the planning and recording of events relating to staff. Holidays, absences and training is recorded through the staff calendar.

Using the calendar gives you an overall view of events that are scheduled within a specified period. Here you can review holiday requests and authorise them, plan training courses and record staff absence where you will have an overall view of scheduling and the impact on the smooth running of the Home.

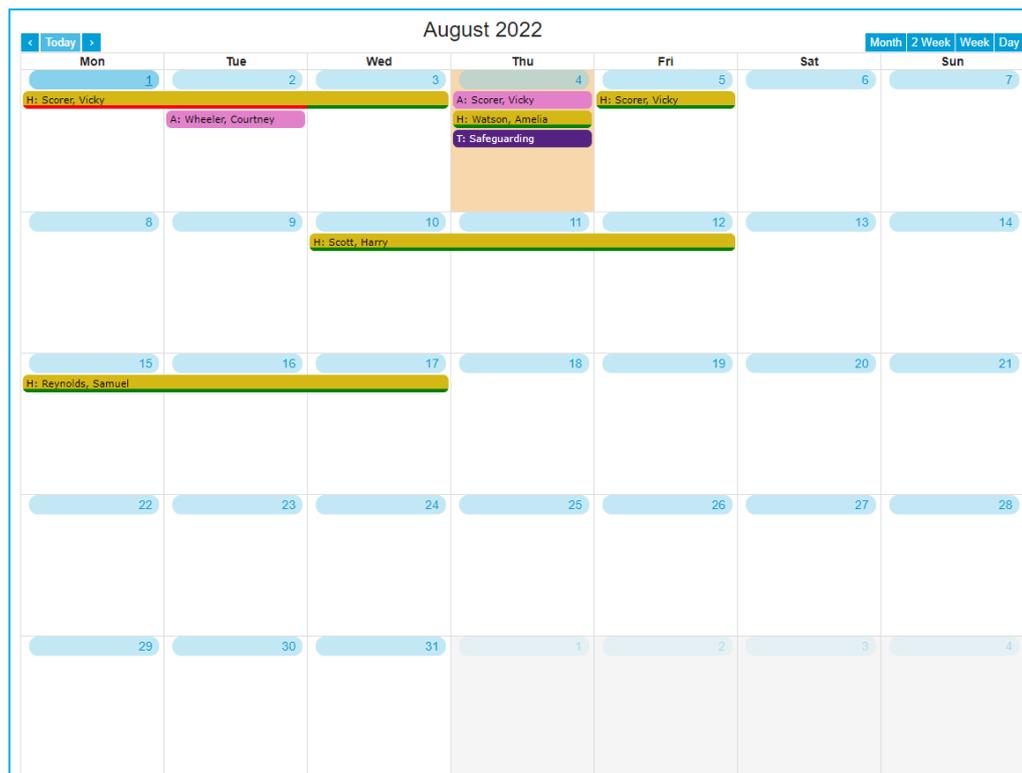
Calendar events created on Coolcare can be seen by the staff in the Staff Portal, My Calendar view. Staff using the Staff Portal can request Holiday that appears on the Calendar as a request to authorise/decline.

## recording holidays, absences and training.

Holidays, Absences and Training events are all managed through the calendar on CoolCare. When creating a calendar event, you can remove staff members from rota shifts and add hours to timesheets for the different events ready for payroll, for example Absence.

## calendar navigation.

- Select **Staff** in the left menu
- Select **Calendar**

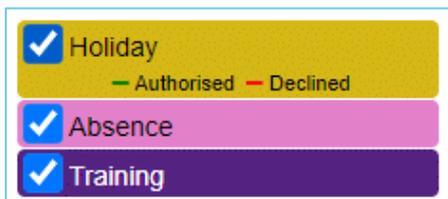


When you open the calendar, it will display the current calendar month. You can change the period displayed by choosing a different view option from the top-right hand area of the screen. Click on the selected view type to change the calendar view. This can be useful if you have several events scheduled for the same day.

Use the navigation buttons to skip forward or backwards as required. Use the **Today** button to quickly return to the current day in the calendar.



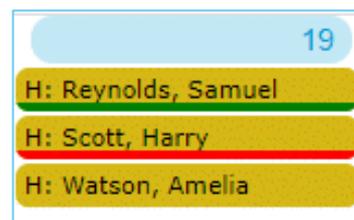
Use the filter options on the Calendar to reduce the information on screen, for example to only review planned training, untick Holiday and Absence. Note the colour coding shown on the filter, this is a visual descriptor to help identify a specific event type.



## holiday.

Holiday events can be created directly in the Staff Calendar or via the Staff Portal feature

- Holidays with a solid green underline describes authorised holiday time.
- Holiday with a solid red underline describes declined holiday requests.
- Holiday with no underline is a request only and has neither been authorised nor declined.

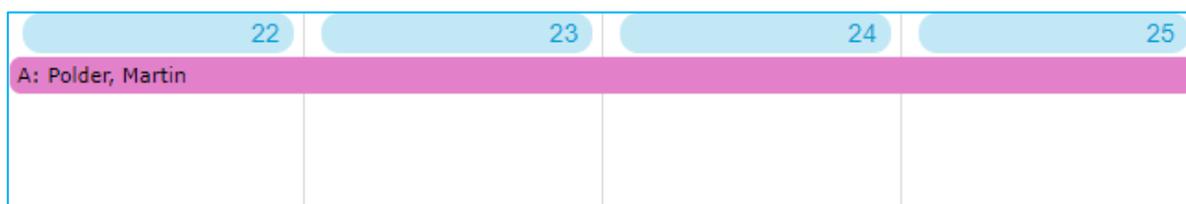


## absence.

Absence from work could be several reasons including sickness, dependents leave, specialist medical appointments. It is important to record absence correctly especially if your staff are unpaid for sickness and if you are recording absence against the Bradford Factor. All absence is denoted pink.

A continued pink line of absence denotes a continued absence, e.g., maternity leave.

The absence appears in the calendar as a single pink line and shows the start and end date of a period of absence and is date inclusive.



## training.

Training is denoted purple on the Calendar. Rather than showing a staff member's name, it will display the name of the training qualification as multiple staff can be added to one training event.



## absence.

Absences can be long or short-term. Absence records added to the calendar will appear in the staff members file and in the absence reports. Authorised absences will appear in the timesheets and payroll sections.

## adding an absence to the calendar.

Before recording absence, consider the type of absence and the reason. Some absence types are to be counted towards the Bradford Factor score; others may be exempt.

Reasons for Absence are defined in the Lookups section of CoolCare. For more information, please see our guide on Adding and Amending Lookups.

- From the Calendar, click on the date that the absence starts
- Select **Absence**
- Choose the staff member from the drop-down list
- Enter the **Date Notified** field of when you first received notification of absence
- Enter the start and end date of the absence in the **When** date fields; you can also specify the times of the absence if it just a part of day absence
- Select the **Reason** for absence from the list; this is a lookup on Coolcare that can be amended and added to
- You can select the **Continuing Absence** option if you do not know when the staff member will be returning from their absence; the absence will keep updating its end date for as long as you leave it this way
- Click the **Self Certified** box if the staff member has self-certified this absence and has not obtained a medical note to support it
- Click the **Doctors Note** field if the absence is supported by a medical note or fit note; this allows you to also add an expiry date to the note
- Enter any supporting **Notes** that may help should you need to refer to this absence later
- If at this point, the absence is authorised (by a fit note or is maternity leave) and you have permissions to authorise absence, you can choose to set the authorisation at this point before saving.

Should the absence occur during a period where the staff member is assigned to a shift on the rota, the **Hours** field will automatically populate with the assigned hours from the shift. This value can be overridden.

The screenshot displays the 'Add Absence' form in the CoolCare system. The form includes the following fields and options:

- Allocated Staff Required:** A dropdown menu showing 'Martin Polder'.
- Date Notified:** An empty text field with a clear button (X).
- When Required:** Two date and time pickers. The first is set to '01/08/2022 00:00' and the second to '01/08/2022 23:59'.
- Reason Required:** A dropdown menu showing 'Short Term Sickness'.
- Continuing Absence
- Self Certified
- Doctors Note
- Notes:** A text area with a character count of '0/2000'.
- Buttons: Save, Delete, and Cancel.

Below the form, a table shows the absence record:

Date	Status	Hours
01/08/2022	Authorised	8

A confirmation dialog box titled 'Remove from rota shift' is overlaid on the bottom right. It asks: 'Would you like to remove the staff member for this authorised day from the rota?' and lists '01/08/2022' as the day. The dialog has 'Yes' and 'No' buttons.

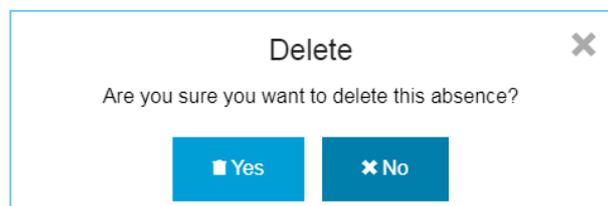
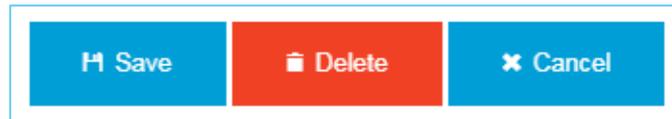
## assigned shifts.

When creating an absence and authorising it, a message will be displayed at the point you save the absence to the calendar. You have the option to remove the assigned staff member from the shift, for example if you're expecting the staff member to be absent for the whole shift, unassign the staff member to identify you have a deficit in your required staffing numbers for that time. You will now be able to assign another staff member or cover/agency on the rota to ensure you maintain minimum levels of staffing on the shift.

## amending an absence.

Once an absence is recorded, it is possible to amend the detail to update the actual detail of a return to work. For example, where you have a staff member who has been absent through illness with no defined return to work, you may have previously set the 'Continued Absence' flag. The staff member has now returned to work, and you want to set the end date. To amend an absence:

- Locate the absence on the calendar; this can be any day of a continuing absence
- Click to open the absence record
- Here you can make changes to the absence details, you can amend any field except **Allocated Staff**.
- Click **Save** to apply your changes or **Cancel**
- If an absence is recorded in error, you can delete the absence in its entirety click the **Delete** button. Select Yes or No to the resulting message



## continuing absences.

If you have an absence without a set end date, you can mark it as a continuing absence via the absence on the calendar. This will make it open ended, updating the end date every day so you don't have to:

- Open the absence on the calendar
- Tick the **Continuing Absence** box
- Click **Save** to confirm

Once the staff member is no longer absent, you will need to end the continuing absence to stop it from updating any further:

- Open the absence on the calendar
- Untick the **Continuing Absence** box
- Click **Save** to confirm



**Please note:** You may need to authorise any continuing days of absence for the staff member to be removed from the rota and the absence hours added to the timesheet. See our section below on authorising the absence.

## authorising absences and absence hours.

Once you have completed the absence details, you can mark each day of the absence as authorised or unauthorised and enter the amount of absence hours per day. By default, all absences will be marked as unauthorised. When an absence is authorised, the absence event will display in the timesheets along with any notes and hours.

To mark an absence day as authorised or unauthorised, select the relevant option for each day within the absence days table on the right-hand side of the page.

To enter or amend absence hours, enter the hours into the hours field for each day within the absence days table.

Once the absence record is complete click **Save**.

Allocated Staff Required  
Martin Polder

Date Notified

When Required  
01/08/2022 00:00 to 04/08/2022 23:59

Reason Required  
Short Term Sickness

Continuing Absence  
 Self Certified  
 Doctors Note

Notes 0/2000

Date	Status		Hours
	Authorised	Unauthorised	
01/08/2022	<input checked="" type="radio"/>	<input type="radio"/>	8
02/08/2022	<input checked="" type="radio"/>	<input type="radio"/>	8
03/08/2022	<input checked="" type="radio"/>	<input type="radio"/>	8
04/08/2022	<input type="radio"/>	<input checked="" type="radio"/>	0

## holiday.

Holidays in the calendar are used to manage and authorise holiday requests for staff members. Authorised holidays added to the calendar will appear within the staff members file and within the Holiday Details report. Authorised holiday hours will appear within the timesheets, payroll and update the rota.

Holiday requests, approved holiday and declined holiday is shown in the Staff Portal feature in the My Calendar view.

## adding a holiday.

- From the Calendar, click on the first date the holiday will start.
- Click Holiday Request
- Choose the staff member from the drop-down list
- Enter the start and end dates in the **When** date fields

**Please Note:** Coolcare calculates the number of accrued hours available to take as holiday and displays the weekly contracted hours for the selected staff member along with the total entitlement of holiday hours for the year.

Accrued Entitlement <b>53.11</b> Hours <small>(Current Year)</small>	Total Entitlement <b>69.55</b> Hours <small>(Current Year)</small>
Contracted Hours <b>30</b> hours	Total Requested Hours <b>11</b> hours

- Add any supporting notes in the **Notes** box
- All newly created holiday events are set to **Requested** by default
- Should any of the holiday time requested span shifts that are assigned on the rota, the **Hours** field will be automatically populated on those assigned shift dates.
- Click **Save**

**Please note:** Staff members can add holiday requests from the staff portal, meaning you may not need to add the holiday requests for them.

## authorising or declining holiday.

Similar to absences, holidays can be authorised or declined in Coolcare.

- From the calendar, locate the holiday request and open the event
- In the right of the window, click to **Authorise** or **Decline** a series of dates or individual dates.
  - Any assigned shift hours from the rota will be shown in the **Hours** field
  - If you do not use CoolCare's rota, insert the number of authorised hours each day to ensure the holiday entitlement is affected and the timesheet updated
- You can authorise or decline a series of dates; click the column header titles to quickly update the buttons
- Once the holiday record is complete, click **Save**

Date	Status ⓘ			Hours ⓘ
	Authorised	Declined	Requested	
01/05/2025	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	12

## training.

Staff training can be planned and managed within the calendar. Attended training will be added into staff members timesheets while achieved training will also be added into a staff members training record.

You can create a training event and schedule multiple staff to attend from one event. Training events can be single day events or part day events.

Training events are also visible in the Staff Portal, My Calendar view.

## adding training.

- From the calendar, click on the day you want to add training to
- Select **Training**
- Enter the date that the training will occur and set the start and end times
- Select the **Qualification** that applies; this list is a lookup that can be amended and added to
- Set the duration – note this field will determine how many hours are added to the timesheet
- Enter any supporting notes

**New Training Record**

When Required: 08/08/2022 12:00 to 14:00 Notes: 0/2000

Qualification Required: First Aid Awareness

Duration: 02:00

[+ Add Staff Delegate](#)

**i** Info - No delegates selected

[! Save](#) [✖ Cancel](#)

- Click the **Add Staff Delegate** button. Those staff who are required to complete the qualification as part of their role in the home will be shown in the list.
- The staff will be sorted by **priority**, showing staff members who have the training as a mandatory requirement but is yet unachieved or it is an expired qualification, then those who have the qualification as an optional requirement for their role will be shown. Alternatively, it can be sorted by **name**, showing all staff in alphabetical order.
- Click the **+** button to add the delegate to the training, they will now appear on the right-hand pane.
- Click the **-** button in the right-hand pane to remove a delegate from the training.
- Click **Add** to assign all the delegates to the training.
- Click **Save** to create the Training event in the Staff Calendar.

### Select Training Delegates

Home  
Sam's Home
Sort by  
name

Name	Requirement	Expiry
+ Amelia Watson	Mandatory	03/05/2024
+ Catherine Lawson	Mandatory	03/05/2024
+ Courtney Wheeler	Mandatory	03/05/2024
+ Emily Galileo	Mandatory	03/05/2024
+ George Moreton	Mandatory	03/05/2024
+ Harry Jonson	Mandatory	03/05/2024
+ Jolyne Stone	Mandatory	Not achieved
+ Martin Polder	Mandatory	Not achieved

+ Add
✕ Cancel

### Selected Delegates

4 selected

Home	Name
- Sam's Home	Amanda Becker
- Sam's Home	Hannah Chau
- Sam's Home	Harry Scott
- Sam's Home	Jennifer Davies

## attendance status.

Once staff members have been added to a training record you can then manage each staff members attendance status from within the main training record. Information you can manage is:

- **Date booked** - The date the staff delegate was booked onto the training course. As a default this is set to today's date. It isn't usually the same date the course is scheduled for
- **Duration** - Amend how long (in hours) the course duration. This information is carried through to the timesheet
- **Status** - Set here the current response from the staff member to confirm/deny attendance to the training course.
- Staff currently assigned to the rota during the course period, when changing the Status as **Confirmed** and then saving the training, you will be asked if you wish to remove the staff from the rota for the training
- Here you have the ability to unassign staff from the rota if required. Delegates who have not confirmed attendance or denied the scheduled course will not be removed from the rota
- **Attended** - Click to confirm the staff member did attend the training. This will add the training hours to the timesheet for any staff that have attended
- **Create Qualification** - Click to confirm the staff member completed the training and is now suitably qualified. The qualification detail will update the staff members record to show training is achieved
- Click the **X** button to remove the delegate from the training course
- **Notes** - Click the **+** button to add any supporting notes or feedback.
- Click **Save**

Staff Name	Home	Date Booked	Duration	Status	Attended	Create Qualification	Notes
Amanda Becker	Sam's Home	04/08/2022	02:00	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ ✕
Hannah Chau	Sam's Home	04/08/2022	02:00	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	+ ✕
Harry Scott	Sam's Home	04/08/2022	02:00	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ ✕
Jennifer Davies	Sam's Home	04/08/2022	02:00	Confirmed	<input type="checkbox"/>	<input type="checkbox"/>	+ ✕

Total: 4 delegates