

# Staff Calendar in CoolCare

## Contents

Staff Calendar in CoolCare.....	1
Introduction.....	1
Recording Holidays, Absences and Training.....	2
Calendar Navigation.....	2
Holiday .....	3
Absence .....	3
Training.....	3
Absence .....	3
Adding an Absences Event .....	4
Assigned Shifts.....	4
Amending an Absence.....	5
Authorising Absences and Absence Hours .....	5
Holiday .....	6
Adding a Holiday.....	6
Authorising or Declining Holiday.....	7
Training.....	7
Adding Training.....	7
Attendance Status .....	8
Review .....	9

## 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.

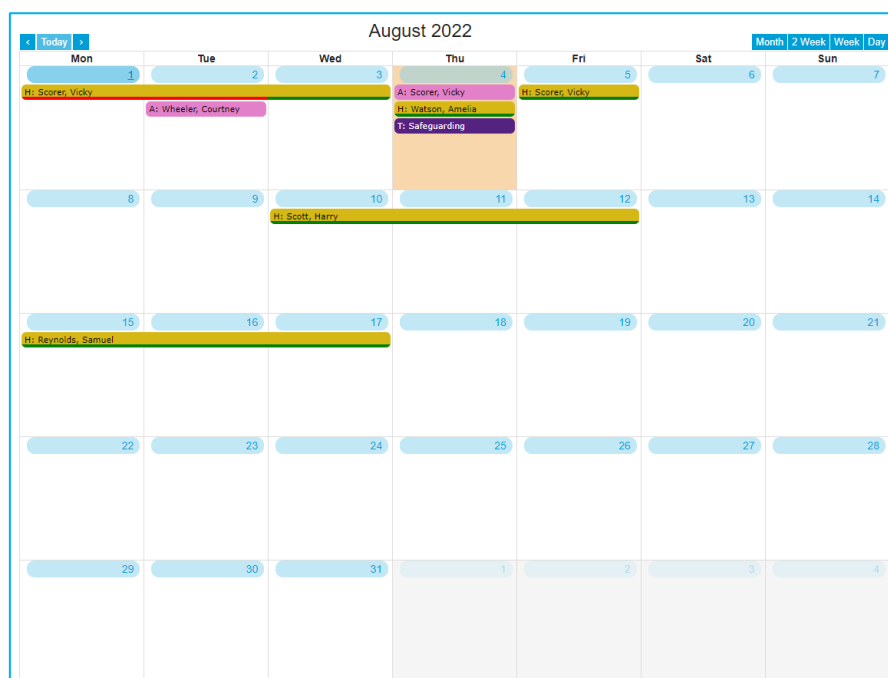
Calendar events created on Coolcare can be seen by the staff in the Staff Portal, My Calendar view. Staff using the Staff Portal can request Holiday that appears on the Calendar as a request to authorise/decline.

## 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 a number of 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.

19
H: Reynolds, Samuel
H: Scott, Harry
H: Watson, Amelia

## Absence

Absence from work could be a number of 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 for example 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.

22	23	24	25
A: Polder, Martin			

## 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.

20	20
T: Emergency First Aid	
1	2

## 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 Absences Event

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.

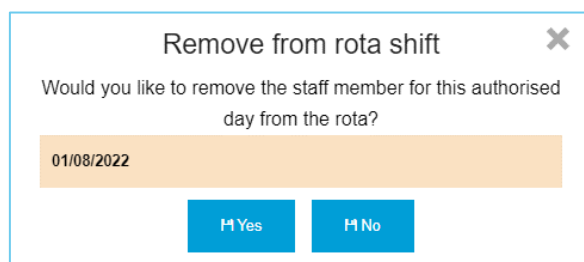
- From the Staff Calendar, click on the date that the absence starts
- Click Absence
- Choose the staff member from the drop-down list that the absence refers
- Enter the **Date Notified** field of when you first received notification of absence
- Enter the start and end date of the absence in the **When** 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 it's 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 back to this absence at a later date
- 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.

Date	Status	Hours
01/08/2022	Authorised	8

## 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 period. You will now have the ability to assign another staff member or cover/agency on the rota to ensure you maintain minimum levels of staffing on the shift.



Remove from rota shift

Would you like to remove the staff member for this authorised day from the rota?

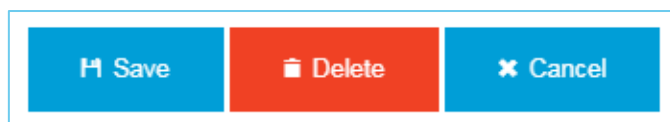
01/08/2022

Yes No

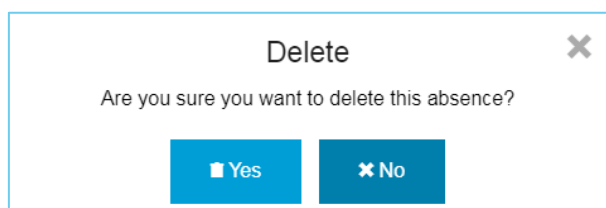
## Amending an Absence

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 first date the absence occurs
- 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



Save Delete Cancel



Delete

Are you sure you want to delete this absence?

Yes No

## 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

Save

Delete

Cancel

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 Staff 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

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
- 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**

## Authorising or Declining Holiday

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

- From the Staff 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.
- Note: 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**

## 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

Qualification Required: First Aid Awareness

Duration: 02:00

+ Add Staff Delegate

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.
- Here you can select attendees from multiple homes within the group. From the **Home** drop down list, choose the appropriate home to locate the delegates
- **Sort by** – here you will see a list of delegates either by name or by priority
- The name sorts the list by first name order

- **Priority** will create a list of those staff members who have the training as a mandatory requirement but is yet unachieved or it is an expired qualification, thereafter, those who have the qualification as an optional requirement for their role will be shown.
- 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

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

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

## 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							



## Review

Date	Version	Reviewed By	Comments
06/03/2020	V1.0.1.01_draft	Michaela Regan	Create draft document
11/06/2020	V1.2	Mike Heckman	
04/08/2022	V1.3	Sam Reynolds	
11/11/2022		Sam Reynolds	New screenshots