new holiday year amendment.

This guide explains how to update your holiday year in CoolCare to ensure staff member's holiday entitlement are reset for the new year and how to record any carry over any additional holiday entitlement.

Please Note: The steps in this guide should be followed after the new holiday year has begun.

step one: reporting on remaining holiday.

Before changing the holiday year, you'll need to gather the remaining holiday each staff member has so it can be carried over to the new year as CoolCare doesn't transfer it automatically. The best way to gather this information is using the **Holiday Details** report, which can be ran for each home individually or at group level. To run the report:

- Navigate to **Staff – Reports**
- Select **Holiday Details**
- Select the report options:
    - **Start Date/End Date** can be anything; the entitlement figures will be for the full year regardless of dates chosen
    - **Format** should be **CSV**; this will give you an excel report to easily see the entitlement for each staff member
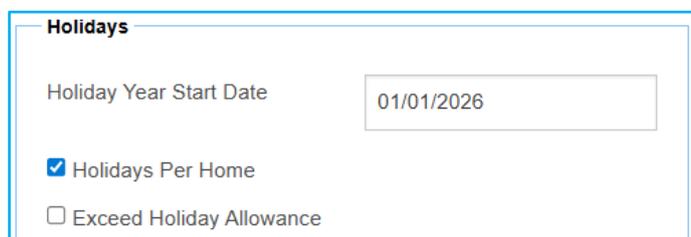
This will download a report of each staff member's holiday entitlement, the important figure being the **Holidays Remaining** in row M.

Please Note: This report needs to be ran **before** changing the holiday year, as once the year is changed the entitlements will be reset and can't be easily undone.

step two: change the holiday year.

Once you've ran the holiday details report for all staff and have their remaining entitlements saved outside of CoolCare, you can change the holiday year. This will be done in one of two places depending on how your system is set up. To check where it needs changing:

- Click your name in the top right of CoolCare
- Select **System Configuration** from the menu
- Navigate to the **Staff** tab on this page
- On this page, check if the **Holidays Per Home** option is ticked or not

If this option is not ticked, the holiday year is changed on this page. If it is, the holiday year is changed in the **Home Setup**.

changing the holiday year in system configuration.

If **Holidays Per Home** is unticked in System Configuration, you can change the holiday year in the same page.

- Click your name in the top right of CoolCare
- Select **System Configuration** from the menu
- Navigate to the **Staff** tab on this page
- Update the **Holiday Year Start Date** to the start of your new holiday year
- Click **Save** at the bottom of the page to complete the change

This will update the holiday year for the entire group, affecting every staff record in all the homes. This will change each staff member's holiday year start to the new date and reset their holiday entitlement for the new year.

changing the holiday year in home setup.

If **Holidays Per Home** is ticked in System Configuration, you'll need to change the holiday year for an individual home. This is done in the home setup page:

- Ensure you're on the right home by checking the home name in the top right corner of CoolCare
  - If you need to change the home you're on, click the home name and select the home you wish to view from the menu
- Navigate to **Care Home – Home Setup**
- Select the **Settings** tab on this page
- Update the **Holiday Start Date** to the start of your new holiday year
- Click **Save** at the bottom of the page to complete the change

This will update the holiday year for this home, affecting all staff in the home. This will change each staff member's holiday year start to the new date and reset their holiday entitlement for the new year.
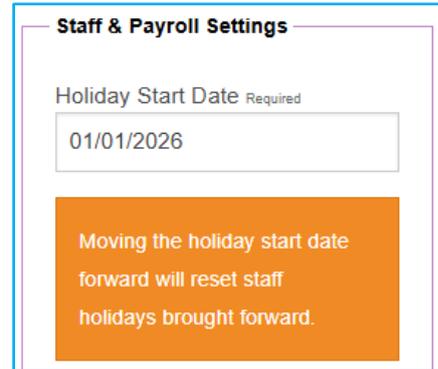
Please Note: If you have multiple homes that require this change, you'll need to change the home you're viewing and then make the same change again.

step three: adding holiday brought forward.

Now that the holiday year has been updated, each staff member's holiday entitlement has been reset for the new year, and you'll need to add any remaining holiday from their previous year as holiday brought forward. This is why we ran the holiday details report first, to see if each staff member has any holiday to carry over before resetting entitlements.

To add the brought forward holiday to a staff member:

- Navigate to **Staff – Staff Records**
- Select the staff member you wish to update
- Select **T&A – Holidays**
- Add the remaining holiday from the Holiday Details report for this staff member to the **Holiday Brought Forward** field on this page
- Click **Save** at the bottom of the page to update the staff member's entitlement

This will add the holiday brought forward to the **Total Entitlement** and **Total Entitlement Remaining** on this page.