top tips when building a rota

Coolcare's rotas can seem daunting, especially when starting out. This mini guide is here to help, listing some things to remember and best practice to keep in mind when creating and managing your rotas. For more information on rotas in Coolcare, please see our other rota guides details below.

- [Rota introduction and setup](#)
- [Implementing a live rota](#)
- [Managing changes to your rota](#)
- [Printing your rota](#)

shift definitions

Before even starting your rotas, make sure to check you have Shift Definitions set up in Coolcare. These can be found in the **Home Setup** section of Coolcare, under the **Staff Positions** tab. Select a position from the list and you will be taken to the **Shift Definitions** page, where you will find the shifts for each position. These shift definitions should be a list of all the different possible shifts this staff position would do; and are used by the rota to say what shifts your staff should be doing as well as the timesheet for shift snapping.

If you need to add new shift definitions, click the **+Insert** button on the shift definitions page and fill out the information required; a name to identify the shift (early, day, night etc.,), the start and end time, and whether breaks should be deducted from this shift on the timesheet. Add as many as you need and then click the **Save** button at the bottom of the page. Once added, these shifts will be able to be used on the rotas as part of a shift pattern or any extra shifts.

rota start date

If you're creating a brand-new rota from scratch, you'll be asked for an initial start date and repeating pattern length. Your start date is when your rota will be able to be applied from, and it's recommended you pick a start date a few weeks before when you actually want your rota to begin.

For example, if I'm creating a 2-week rolling rota to begin from Monday 2nd January, I would pick my initial start date as Monday 19th December, 2 weeks before I want my rota to start. This way, I have space to save and apply my rota before it actually reaches the date it should start from.

To work out what start date you should use, subtract your rota length from the day you want your rota to start from; i.e., if you're creating a 4-week rota your initial start date should be 4 weeks before you want your rota to start.

remember your budgets

As you're creating your rota setup, it's best practice to keep the budget you want to achieve in mind. As you create shift patterns and add to your rota it will update the budget at the top of the shift group and the full budget at the bottom of the rota. These budgets then feed into your live rota to ensure you have the correct staffing levels, so as long as it's correct on the rota setup, it will be correct on the live rota.

Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5
S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48

shift pattern creation

There are 2 recommended methods of creating your shifts on the rota setup; rolling rotas and block shifts. Each has their own pros and cons; rolling rotas are better for staff with set, unchanging shift patterns, whereas block shifts are better for flexible staff who work different shifts week to week.

Rolling rotas involve creating a set shift pattern for each staff member, and then assigning each staff member to their own pattern. Block shifts involve adding all the shifts to the rota in one go to create the budget you require (e.g., 1 Senior Carer, 3 Care Assistants) and then assigning staff to individual shifts on the live rota one by one.

applying your rota

When you're ready to make your rota live, you'll need to click **Apply Changes** on the Rota Setup page. This will then ask you for a **Date of first shift**; this date is when the changes you've made on your rota setup will appear on your live rota. When first creating your rota, it is recommended to select the *earliest date possible* as your date of first shift. This way you can apply the rota multiple times before reaching your actual start date. This is why it's recommended to pick your initial rota start date to be a few weeks before the date you want the rota to start from. Don't panic about what day of the week the rota is applied from, Coolcare will take that into account and ensure shift patterns are all kept in line with your initial start date.

It is also recommended to avoid applying changes to your rota from a future date, especially when doing initial rota creation. If you apply a future rota, you will be unable to amend your rota setup until the date you specified is reached unless you cancel the future rota, which will remove the changes from your live rota.

small changes to your rota

Once your rota is live, you're able to make changes to it to reflect any changes to your staffing on a day-to-day basis. The live rota is the best way to handle these small changes, such as adding extra shifts, staff swapping shifts, split shifts, changing shift times and assigning cover for absences and holidays as well as bringing in agency cover. The live rota is the best way to keep your rotas up to date for your staff, and you should only need to change your rota setup for *permanent* changes, such as adding the shift patterns for new staff, making a long-term adjustment an existing shift pattern, or updating your rota's budget. For everything else, the live rota can handle any temporary and day-to-day changes.

Position	Staff	Fri 25 Nov	Sat 26 Nov	Sun 27 Nov	Mon 28 Nov	Tue 29 Nov	
▼ Care Days	Day	S: 4/4 H: 36.00/48.00	S: 5/4 H: 36.00/48.00	S: 4/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 3/4
👤 Senior Carer	Amelia Watson				A. Wats… 07:00-19:00	A. Wats… 07:00-19:00	A. Wa
👤 Senior Carer	Nadine Khan	N. Khan 07:00-19:00	N. Khan 07:00-19:00	N. Khan 07:00-19:00			
👤 Senior Carer							
👤 Care Assistant	Amanda Becker	S. Olson 07:00-19:00			A. Becker 07:00-19:00	A. Becker 07:00-19:00	
👤 Care Assistant	Courtney Wheeler	C. Whe… 07:00-19:00			C. Whe… 07:00-19:00	C. Whe… 07:00-19:00	
👤 Care Assistant	Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00			N. Ha
👤 Care Assistant	Sarah Olson		A. Becker 07:00-19:00	S. Olson 07:00-19:00			S. Ol
👤 Care Assistant		N. Harris 07:00-19:00	V. Scorer 07:00-19:00	B. Doyle 07:00-19:00	07:00-19:00	07:00-19:00	
👤 Care Assistant							
👤 Care Assistant			Agency 11:00-15:00				
▼ Care Nights	Night	S: 3/3 H: 12.00/36.00	S: 3/3 H: 12.00/36.00	S: 3/3 H: 12.00/36.00	S: 1/3 H: 12.00/36.00	S: 0/3 H: 0.00/36.00	S: 0/3
👤 Senior Carer Night		H. Jons… 19:00-07:00	H. Jons… 19:00-07:00	H. Jons… 19:00-07:00	19:00-07:00	19:00-07:00	
👤 Care Assistant Night		H. Chau 19:00-07:00	M. Polder 19:00-07:00	M. Polder 19:00-07:00	19:00-07:00	19:00-07:00	
👤 Care Assistant Night		M. Polder 19:00-07:00	H. Scott 19:00-07:00	H. Scott 19:00-07:00	H. Scott 19:00-07:00	19:00-07:00	
👤 Care Assistant Night							

requesting shift cover

You can use the rota to request cover for your shifts, sending a message to staff members asking if they're available to cover a shift. As long as the staff record has a mobile number, you'll have the option to **Message Staff** when looking at a shift. The staff member will receive a text and can respond; updating on the shift once they respond. If you click the **Cover Requests** button at the top of the live rota you will be given a list you've sent messages for and see how many people have responded; however, you'll still need to open the individual shift to see further detail and select the staff member to cover the shift.

Staff can also request shifts themselves via the Staff Portal; if you see an exclamation mark where the Message Staff button would normally be, it means the staff member has requested this shift already from the portal and they are available.

printing your rota

You can print off your rota for those who still prefer to see a paper copy. Before printing, selecting your start date at the top left of the live rota will select what date the printed rota starts from; it's recommended to select a Monday so that the rota is printed Monday-Sunday.

Also, the recommended way of printing the rota is to print **By Group**. This will separate your printed rota into your shift groups, breaking down the staff and making it easier to read. The rota will print 4 weeks from the date you initially select, and with print options you can select which pages you want to print if you don't want to print the entire rota for all staff.