

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](#)
- [Assigning Staff to your 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.

Position: Care Assistant Department: Care

Shift Definitions Codes Bank Staff Codes Break Deductions

+ Insert

Name	Start	End	Period	Deduct Breaks
Long Day	07:00	19:00	Day	<input checked="" type="checkbox"/>
Morning	07:00	13:00	Morning	<input checked="" type="checkbox"/>
Afternoon	13:00	19:00	Afternoon	<input checked="" type="checkbox"/>

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.

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
▲ Senior Carer	Amelia Watson				A. Wats... 07:00-19:00	A. Wats... 07:00-19:00
▲ 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
▲ 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.

Courtney Wheeler	07234895673	Message Staff
Harry Scott	07496265978	✓ 10:32 12/08/2025
Amelia Watson	07496265978	! 11:23 12/08/2025

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.

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.