rota introduction and setup.

rota introduction.

The concept of building a rota is to create a schedule from which you can assign staff to shifts. The shifts will reflect your requirements at the home to operate within the CQC guidelines for the number of residents you have on-site. In addition, some homes make plans to include additional staff for such eventualities of staff absence or feel that the 'bare minimum' is not enough staff to provide suitable care for their resident's needs. Each home will adopt an approach that works for them and their residents and create a base plan.

The draft rota is the start of the rota process. It enables the ability to track the number of shifts added to the draft rota to create a budget of required staff. This budget feeds into several staff reports and other parts of the system to allow you to easily track and compare your budgeted staff.

Using the rota is not only a powerful planning tool, but it also gives you financial visibility of your change in costs, highlights when your staff levels are below your minimum plan and when you have too many staff on shift. More importantly, it is dynamic. When changes are made, they instantly update those financial totals and staffing levels. Those changes can be communicated via the Staff Portal. For more information on the Staff Portal and how it interacts with the rota, please refer to our Staff Portal guides.

rota setup.

The Rota Setup is accessed from the left-hand menu in CoolCare:

- Click on **Care Home**
- Select Rota Setup

If this is your first time opening the Rota Setup, the **Initial Rota Config** screen is shown first.

Before starting the Rota Draft, the system requires some information to create a base plan.

- Enter the **Shift Pattern Start Date**; the date you want your rota to start from. This is week 1, day 1 of your pattern, so if your rota usually starts on a Monday, select a date that would be a Monday.

  o When choosing the start date, we suggest selecting a date a few weeks before your intended start date, ideally in the past. This will help with applying and saving the draft rota later.

- Enter the **Rota Length**; this defines the length of your repeating rota that all of your repeating shift patterns will need to fit in to.

  o For example, if you create a 7-day rota and your Deputy Manager works on Monday, Wednesday and Friday – every week thereafter, those same shifts will appear on the same days for the same position.

  o Another example, your Carers work a 2 on, 2 off pattern and your Rota starts on a Monday. You would need a 28-day rota for this pattern to cycle and restart at the correct point in the calendar. With this definition, those shifts will cycle in the same pattern thereafter.

- When you are happy with the start date and rota length, click **Save**. The screen will then change to **Rota Setup (Draft View)** where you are able to start building your rota.

building the rota.

Once you have completed the initial config, you now need to add in shift groups. Shift groups allow you to break down your rota into different sections, grouping up your staff into the shift groups you define.

For example, you may create shift groups for your different departments (Care, Ancillary, Admin, Kitchen etc.), time of day (Earlies, Lates, Full Day, Nights etc.), or location (different floors or units). How you define the shift groups is up to you, and they can be amended after being created.

adding shift groups.

- Click the **+Shift Group** button
- Enter a name for the group
- Click **Save**

You will now see the shift group added to the display. Repeat the steps to add further groups until you have completed your design.

deleting shift groups.

If you wish to remove a shift group from the draft, click the bin icon next to the group's name.

A message will be displayed to confirm the group has been deleted and your draft design will be updated to show the Group is removed.

Please Note: You cannot rename a shift group at this stage. If you wish to change the name of a group, delete and re-add it with the correct name. Once your rota is applied you will be able to rename a shift group.

example shift groups.

Here are some examples of how you may set up shift groups that reflect your Home.

This first example is a mixture of departments, with the care department broken down into days and nights.

The second example is a mixture of locations and different departments.

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creating shift patterns.

Once you have created your shift groups, you now need to assign your staff positions and shift patterns to each group. There are 2 methods for creating shift patterns.

- Rolling shift pattern – a fixed pattern that does not change (e.g., Monday - Friday)
- Unassigned shifts – for staff that don't work set patterns, you define how many staff you require each day

creating a rolling shift pattern.

For staff that work set shifts, you are able to create a rolling shift pattern that can you assign to the staff member without having to repeatedly assign them to the shifts. To add a shift pattern to a shift group:

Click **+Shift Pattern** on the shift group you want to add a pattern to

Choose the associated position for this shift group from the drop-down list

Please Note: The positions available to choose from are created when setting up CoolCare, please refer to our Group Setup for further information on adding positions.

Click **Save** to add the shift pattern to the rota: your shift group will now be expanded and will include the first row for the position you added.

Once you have added a row for each staff position you require, your draft displays this:

If your staff work to rolling shift patterns, you can now create those shift patterns for each of your staff members.

In the row where you want to create a shift pattern, click anywhere on the left-hand side. You can click the position name, the assigned staff (the empty space), or rota hours box.
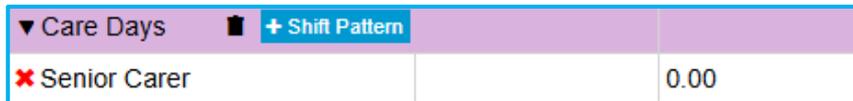
This will open a new window on the page, the Shift Pattern Builder.

Using the shift pattern builder, you are then able to create the rolling shift pattern:

- Choose the **First Shift in Pattern**; this is which day of the rota this pattern is starting from. If your pattern is starting from the first day of the rota, you can leave this as Week 1, Day 1.
- Then, you select how many days in a row the staff member works, and what shift they will be working on those days. This is done using the **Days** and **Shift Definition** fields.
- Use the **+Add Row** button to add another set of Days and Shift Definition fields, where you can define how many days off the staff member has after working.
- Keep adding rows until you have created your full shift pattern.

Below is an example of a complete shift pattern; this is a basic pattern where the staff member works Monday-Thursday and is off Friday-Sunday. You can add as many rows as you need to create as complex a pattern as you need.

Shift Pattern Builder
Senior Carer in Care Days

First Shift In Pattern: Week: 1 Day: 1 (Day of pattern: 1)

ℹ Info - Pattern will be overriden with new shifts

Days: 4   Shift Definition: Long Day : 07:00 - 19:00 ✖

Days: 3   Shift Definition: Off ✖

+ Add Row

✔ Pattern fits

⊡ Build Pattern

Where you have correctly defined the number of shifts for this rota, the message **Pattern Fits** is displayed. This means that the shift pattern you have created will fit into your full rota. Click **Build Pattern** to apply those shifts to the draft rota.

You will now see a shift pattern you have created on the draft view.

Please Note: We have only created the pattern, a staff member is not yet assigned it. See our Rota Implementation guide for information on adding staff to the rota.

Rota Setup (Draft View)

+ Shift Group   ⟲ Apply Changes   ⚙ Settings   ⟲ Reset Draft

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1		Week: 1 Day: 2		Week: 1 Day: 3		Week: 1 Day: 4		Week: 1 Day: 5		Week: 1	
▼ Care Days 🗑 + Shift Pattern		Day	S: 1	H: 12	S: 1	H: 12	S: 1	H: 12	S: 1	H: 12	S: 0	H: 0	S: 0	
✖ Senior Carer		96.00	07:00-19:00		07:00-19:00		07:00-19:00		07:00-19:00					
✖ Senior Carer		0.00												
✖ Care Assistant		0.00												
✖ Care Assistant		0.00												
✖ Care Assistant		0.00												
✖ Care Assistant		0.00												
✖ Care Assistant		0.00												
▶ Care Nights 🗑 + Shift Pattern														
Budget Totals			S: 1	H: 12	S: 1	H: 12	S: 1	H: 12	S: 1	H: 12	S: 0	H: 0	S: 0	

Keep creating your shift patterns for each individual position until your rota is full.

Rota Setup (Draft View)

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▼ Care Days 🗑 + Shift Pattern		Day	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3
✖ Senior Carer		96.00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00		
✖ Senior Carer		72.00					07:00-19:00	07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		0.00						
▶ Care Nights 🗑 + Shift Pattern								
Budget Totals			S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3

creating unassigned shifts.

If you have staff that don't work to set patterns, you'll want to fill your entire rota row with the shifts that you need, so that you know how many staff you require each day and can assign them to the shifts individually. To do this:

- Open up the shift pattern builder for the position you want to add shifts for (click the position name, assigned staff or rota hours in the row).
- Instead of creating an individual pattern, you will fill in the **Days** field as 1 and choose the **Shift Definition** you want to fill every day with.

- Click **Build Pattern**. This will fill the entire row with the shifts you require for that staff position.

Rota Setup (Draft View)

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▶ Care Days 🗑 + Shift Pattern		Day	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3
▼ Care Nights 🗑 + Shift Pattern		Night	S: 1 H: 12	S: 1 H: 12	S: 1 H: 12	S: 1 H: 12	S: 1 H: 12	S: 1
✖ Senior Carer Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		0.00						
✖ Care Assistant Night		0.00						
Budget Totals			S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4

Please Note: This is not a shift pattern for an individual to work to, but a number of shifts for different staff members to be assigned to.

Repeat this for each row you have until you have the right amount of shifts each day for the number of staff you require.

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▶ Care Days 🗑 + Shift Pattern		Day	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H
▼ Care Nights 🗑 + Shift Pattern		Night	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H
✖ Senior Carer Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
Budget Totals			S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6 H

Rota Setup (Draft View) — + Shift Group, ⟳ Apply Changes, ⚙ Settings, ⟲ Reset Draft

viewing rota budget totals.

Once you have entered all your shift patterns and unassigned shifts, you will be able to see the budget totals for each day in a couple of places.

Firstly, above each shift group you will see a breakdown of your budget on each day of the rota for that group based on the day period.

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▼ Care Days 🗑 + Shift Pattern		Day	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3
✖ Senior Carer		96.00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00		
✖ Senior Carer		72.00					07:00-19:00	07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		0.00						

Based on how your shift definitions are set up, this may be a single line showing the budget for the whole shift group, or multiple lines breaking the budget down into different day periods (morning, afternoon, day, night etc.,). Either way, this will show you how many staff you have budgeted in on each day.

Also, you can see the full budget total for all shift groups combined at the bottom of the rota:

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▼ Care Days 🗑 + Shift Pattern		Day	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3
✖ Senior Carer		96.00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00		
✖ Senior Carer		72.00					07:00-19:00	07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		0.00						
▼ Care Nights 🗑 + Shift Pattern		Night	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3
✖ Senior Carer Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
Budget Totals			S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6 H: 72	S: 6

This adds up the budget from all of your shift groups and day periods all together for a single, full budget total.

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deleting a shift pattern.

If you have added a shift pattern to a shift group and wish to delete it, click the red **X** button next to the position name.

- Click **Delete Pattern** to confirm

apply changes.

Once your draft rota is created, you need to apply it in order to make it live and start adding staff.
Click **Apply Changes** to complete the rota draft and create the live rota.

Enter the date the rota draft will apply from; this is the day the shifts from the draft start to appear on the live rota from.

Click **+Create Rota** to create the live rota. This will take all the shifts you have created on the draft rota and create a live rota from it. You will be taken to **Staff – Rota** in CoolCare where the live rota will load up.

changing the rota start date or length.

If you click the **Settings** button at the top of the rota, you can amend the rota's start date or repeating pattern length.

Please Note: If you amend the repeating pattern length, your shift patterns with be removed from the rota setup. This is because your existing patterns may not fit the new rota length, so they will need to be recreated.

resetting the draft rota.

If you make some changes to your draft but decide against them, you can undo those changes by using the red **Reset Draft** button at the top of the page. This will undo any changes you have made to your draft rota and reset it back to the last time the rota was applied. If there is no applied rota to reset to, it will instead revert back to the initial rota config page.
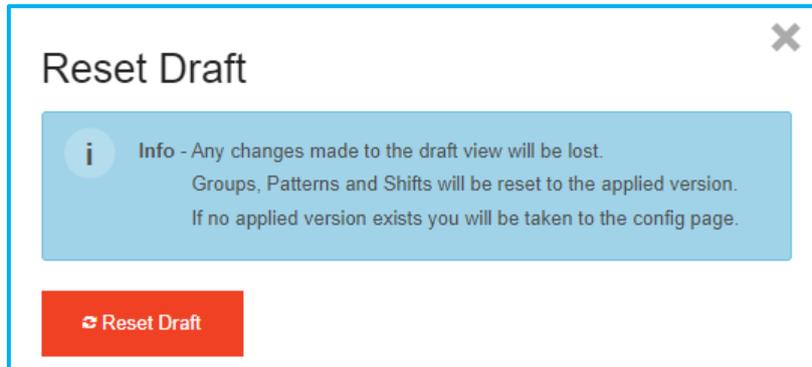
comparing draft rota to current rota.

Once you have applied rota, you can compare your draft version to the applied version by using the **Back to Current** button at the top of the Rota Setup page.


reordering the rota.

After clicking the **Back to Current** button in the rota setup, the screen will change to **Rota Setup (Currently Applied)**. This shows how the live rota is currently set up and gives you a few extra options to amend the rota's layout.

From this screen, you can also jump straight to the current live rota using the **Go to Rota** button.

You can change the order of shift groups and rows on the rota using the up and down arrows next to each row. You can also rename shift groups by using the pencil icon next to each group's name.
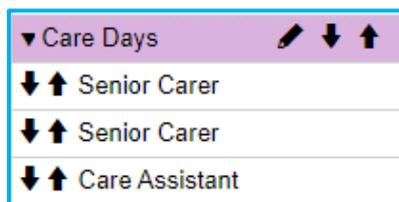
If you wish to go back to the draft rota to make changes, you can press the **View Draft** button.

Now you've begun to create your new rota, have the basis of shift patterns for staff and a budget to keep track of. The next steps will be assigning staff to these shift patterns and making your rota live. The second rota guide **Implementing a Live Rota** will go through the next steps of adding staff to the rota.

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