

# implementing a live rota

## live rota

As described in the “rota introduction and setup” guide, your Rota Setup is a plan on which to build. You now have the basis of shift patterns for your staff and a budget.

The Live Rota is used to now assign staff members to the shifts. Here you can change staff members assigned to shifts in the event someone is absent or if you require additional cover for an event at the home.

This part of the rota is where you can make small changes to accommodate changes in your staffing and needs on a day-to-day basis; amendments made on the fly when staff need to swap shifts or require extra cover (**please refer to the managing your rota guide for details on this**). Any changes made here do not affect your rota setup no matter how much they may deviate from it.

## assigning shift patterns

In the example below, the draft rota has shift patterns to accommodate a budget of 1 Senior Carer and 3 Care Assistants per day. There is a mixture of repeating shift patterns and a row of unassigned shifts for flexible staff to create our budget total.

On the draft, shift patterns are created, now you can assign the pattern to the staff member to which it applies. To do that, click the space in the **Staff** column for the shift pattern you want to add a staff member to.

Rota		02/08/2022			<input checked="" type="checkbox"/> Default Staff <input type="checkbox"/> Unassigned <input type="checkbox"/> Holiday Request <input type="checkbox"/> Agency		Text staff when assigned to shift OFF <input type="checkbox"/> ON <input checked="" type="checkbox"/>					
Position	Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug	Sat 06 Aug						
▼ Care Days	Day	S: 2/4 H: 24.00/48.00	S: 1/4 H: 12.00/48.00	S: 2/4 H: 24.00/48.00	S: 3/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 3/4					
Senior Carer	Dav	07:00-19:00	07:00-19:00	07:00-19:00								
Senior Carer	Nadine Khan				N. Khan 07:00-19:00	N. Khan 07:00-19:00	N. Khan					
Care Assistant	Amanda Becker	A. Becker 07:00-19:00				A. Becker 07:00-19:00	A. Be					
Care Assistant	Courtney Wheeler	C. Whe... 07:00-19:00				C. Whe... 07:00-19:00	C. Wh					
Care Assistant	Vicky Scorer		Holiday 07:00-19:00	V. Scorer 07:00-19:00	V. Scorer 07:00-19:00							
Care Assistant	Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00							
Care Assistant		07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00						
Care Assistant												
► Care Nights	Night	S: 0/3 H: 0.00/36.00	S: 0/3 H: 0.00/36.00	S: 0/3 H: 0.00/36.00	S: 0/3 H: 0.00/36.00	S: 0/3 H: 0.00/36.00	S: 0/3					

The shift pattern window will now display. Enter the date that you want the shift pattern to be assigned from. It doesn't have to be the start of the rota; you may have a staff member joining later in the month or a change in position.

## Shift Pattern: Senior Carer

Start Date

Assign Staff

Covered

History

Once you have chosen the start date, the available staff who have the position as their main or an extra position will show in the display. Staff with the position as their main will have tick in the Main Position column, whereas staff with the position as an extra do not.

## Shift Pattern: Senior Carer

Start Date

01/08/2022

Staff Name

Main Position

Amelia Watson



Todd Ingram



Nadine Khan



Assigned to another pattern

- Click the Staff Name
- Click the Assign Staff button

The shift pattern will then be assigned to the staff member. Their name will appear in the staff column and they will be added to each shift in that pattern.

Rota		02/08/2022	31	<input checked="" type="checkbox"/> Default Staff <input type="checkbox"/> Unassigned <input type="checkbox"/> Holiday Request <input type="checkbox"/> Agency		Text staff when assigned to shift	OFF	ON	Go to Staff View	Go to Rota Setup	Cover Requests	Print
Position	Staff	Tue 02 Aug		Wed 03 Aug		Thu 04 Aug		Fri 05 Aug		Sat 06 Aug		
▼ Care Days	Day	S: 3/4	H: 36.00/48.00	S: 2/4	H: 24.00/48.00	S: 3/4	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. Wats... 07:00-19:00						
Senior Carer	Nadine Khan							N. Khan 07:00-19:00		N. Khan 07:00-19:00		N. Khan
Care Assistant	Amanda Becker	A. Becker 07:00-19:00								A. Becker 07:00-19:00		A. Becker
Care Assistant	Courtney Wheeler	C. Whe... 07:00-19:00								C. Whe... 07:00-19:00		C. Wheeler
Care Assistant	Vicky Scorer			Holiday 07:00-19:00		V. Scorer 07:00-19:00		V. Scorer 07:00-19:00				
Care Assistant	Nora Harris			N. Harris 07:00-19:00		N. Harris 07:00-19:00		N. Harris 07:00-19:00				
Care Assistant		07:00-19:00		07:00-19:00		07:00-19:00		07:00-19:00		07:00-19:00		
Care Assistant												
► Care Nights	Night	S: 0/3	H: 0.00/36.00	S: 0/3	H: 0.00/36.00	S: 0/3	H: 0.00/36.00	S: 0/3	H: 0.00/36.00	S: 0/3	H: 0.00/36.00	S: 0/3

## identifying assigned shifts

There are visual indicators to help the management of the rota. Colour coding denotes where shifts are assigned. The key at the top of the page describes the shift colour that is being shown:

- Blue shifts are regular assigned shifts
- White shifts are unassigned
- Brown shifts are assigned to agency staff
- Yellow shifts are shifts where the staff member has put in a holiday request

Rota		02/08/2022	31	Default Staff	Text staff when assigned to shift	Go to Staff View	Go to Rota Setup	Cover Requests	Print
				<input type="checkbox"/> Unassigned	OFF <input type="checkbox"/> ON				
				<input type="checkbox"/> Holiday Request					
				<input type="checkbox"/> Agency					
Position	Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug	Sat 06 Aug			
▼ Care Days	Day	S: 4/4 H: 48.00/48.00	S: 2/4 H: 24.00/48.00	S: 3/4 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. Wats... 07:00-19:00					
Senior Carer	Nadine Khan				N. Khan 07:00-19:00	N. Khan 07:00-19:00	N. Khan		
Care Assistant	Amanda Becker	A. Becker 07:00-19:00				A. Becker 07:00-19:00	A. Be		
Care Assistant	Courtney Wheeler	C. Whe... 07:00-19:00				C. Whe... 07:00-19:00	C. Wh		
Care Assistant	Vicky Scorer		Holiday 07:00-19:00	V. Scorer 07:00-19:00	V. Scorer 07:00-19:00				
Care Assistant	Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00				
Care Assistant		Agency 07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00			
Care Assistant									

## assigning an agency shift

Agency staff can be added via the rota to support staffing levels.

- Click on a shift to assign staff
- Click the **Covered by Agency** button
- Complete the required fields
- Click Save

 Covered By Agency

Assign Shift to Agency

i

Info - This will create a record in the Agency Ledger

0/500

Notes

Name of Agency

West Yorkshire Agency Care

Reason for Agency

Staff Absence

Agency Staff Member Name

Staff Covering for

Martin Polder

Back

Save

The shift will now be colour brown on the rota, and will create an entry on your Agency Ledger for this shift.

## deleting a shift

You can delete a shift from rota, an example may be that your requirement for this week has reduced and you do not need as many staff as planned.

- Click on the shift to open its details
- Click the **Delete Shift** button
- A new box will open to confirm the shift's details



×

Would you like to delete this shift?

Date: 03/08/2022

Shift: Day: 07:00 - 19:00

Day Period: Day

Rota Hours: 12

Position: Care Assistant

Assigned Staff: None

i

Info - A staff member assigned to this shift will be unassigned. This will not affect the rolling shift pattern.

Delete Shift

Cancel

- Click **Delete Shift** to continue
- Click **Cancel** to prevent the change

Please note, when deleting a shift, it will only delete the single shift on the live rota, not affect the repeating shift pattern. If you need to remove a shift from a repeating pattern, amend the shift pattern on the Rota Setup page.

## rota budgets & totals

Based on budget you created from the rota setup, the required number of staff members are correctly assigned for each day. This information is visible on the daily totals that you see at the top of each shift group. The totals are also broken down to a period of the day that you assigned when you created the shifts on the staff position.

Please check our *Home Setup in CoolCare* guide for more information on shift definitions and day periods.

**Green** – On budget, all shifts assigned

**Red** – Under budget, you have unassigned or deleted shifts

**Blue** – Over budget, you have more staff on shift than originally planned

You now have an immediate view where your budget is impacted by staffing levels.

In addition to the colour guide, the totals will include the budgeted number of hours and shifts expected each day.

Position	Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug	Sat 06 Aug	
▼ Care Days	Day	S: 4/4 H: 48.00/48.00	S: 4/4 H: 48.00/48.00	S: 3/4 H: 36.00/48.00	S: 5/4 H: 60.00/48.00	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. Wats... 07:00-19:00			
Senior Carer	Nadine Khan				N. Khan 07:00-19:00	N. Khan 07:00-19:00	N. Khan
Care Assistant	Amanda Becker	A. Becker 07:00-19:00				A. Becker 07:00-19:00	A. Becker
Care Assistant	Courtney Wheeler	C. Whe... 07:00-19:00				C. Whe... 07:00-19:00	C. Wheeler
Care Assistant	Vicky Scorer		C. Whe... 07:00-19:00	V. Scorer 07:00-19:00	V. Scorer 07:00-19:00		
Care Assistant	Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00		
Care Assistant		Agency 07:00-19:00	S. Olson 07:00-19:00	07:00-19:00	S. Olson 07:00-19:00	07:00-19:00	
Care Assistant					B. Doyle 07:00-19:00		

## specify your own budget tolerances

You are able to specify your own budget tolerances to amend what CoolCare thinks is acceptable hours versus the budgeted shifts and hours, changing what amounts count as Green, Red, and Blue on the rota.

Budget tolerances are specified in **Home Setup - Settings**, where you can set the Under and Over budget tolerances. They define what variances from the budget will still show as green, and are set as percentages.

General
Rooms
Staff Positions
Break Deductions
**Settings**
Lookups

Home Settings
Email Invoicing

**Staff & Payroll Settings**

Holiday Start Date Required  
01/04/2022

Geolocation Required  
England

Payment Frequency Required  
Monthly

**Invoice Program Settings**

Cost Centre

Sage 50 Department

Sun/Sage 200 Department

**Rota/Timesheet Configuration**

Snap To Shift Limit Time Required  
15 Minutes

Hour Rounding Interval (Not Snapped Only)  
15 (0.25 hours) Minutes

☐ All Shift Break At Midnight  
☒ Snap To Pre-Set Shift Times  
☒ Link Absence To Rota

**Budget Tolerances**  
Under 10 % Over 25 %  
The Under and Over Budget Tolerances are a percentage used when checking whether the number of shifts and hours are acceptable in the budgeted shifts and hours.  
[Show Examples](#)

Before Shift Start Required  
30 Minutes

After Shift Start Required  
5 Minutes

Arrive Late Dock Interval  
15 (0.25 hours) Minutes  
When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-in times to the next minute interval to give suitable decimal values.  
[Show Examples](#)

After Shift Ends Required  
30 Minutes

Before Shift Ends Required  
0 Minutes

Leave Early Dock Interval  
15 (0.25 hours) Minutes  
When calculating the standard hours as seen on the timesheet this value will be used to adjust the clock-out times to the previous minute interval to give suitable decimal values.  
[Show Examples](#)