

managing changes to your rota

changes to the rota

You may be required to change the rota to adapt to day-to-day requirements at the Home, for example if a staff member calls in sick or is on holiday.

All absence is recorded in the Calendar. Please refer to our Calendar guide for further information on recording absences and holidays.

Shifts that are unassigned because of a change from the Calendar will say either Holiday, Absence or Training on the shift.

You can easily spot where shifts are unassigned by checking your budget at the top of the shift group, if it is red then a shift has been unassigned and requires cover.

Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug
Day	S: 4/4 H: 48.00/48.00	S: 4/4 H: 48.00/48.00	S: 4/4 H: 36.00/48.00	S: 3/4 H: 48.00/48.00
Amelia Watson	A. Wats... 07:00-19:00	A. Wats... 07:00-19:00	A. Wats... 07:00-19:00	
Nadine Khan				N. Khan 07:00-19:00
Amanda Becker	A. Becker 07:00-19:00			
Courtney Wheeler	C. Whe... 07:00-19:00			
Vicky Scorer		C. Whe... 07:00-19:00	V. Scorer 07:00-19:00	Holiday 07:00-19:00
Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00
	Agency 07:00-19:00	S. Olson 07:00-19:00	A. Becker 07:00-19:00	S. Olson 07:00-19:00

To reassign the shift to another staff member:

- Click the unassigned shift
- The list will display staff that have the correct position to be able to cover this shift, and some additional information relating to each staff member
- Click to highlight the staff member you wish to reallocate the shift to. You can only select staff that are already assigned to another shift; however, you can still select a staff member if they have a holiday/absence/training from the calendar on that day

Shift Details

Date: 05/08/2022
Shift: Day: 07:00 - 19:00
Day Period: Day
Rota Hours: 12
Assigned Staff: None

☒ Staff has accepted
☒ Staff has declined
☒ Staff has not responded
☒ Staff has requested

☒ Covered By Agency ☒ Delete Shift

Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Message	Staff Notes
Sanjita Carr	✓		✓			- No Mobile -	
Courtney Wheeler	✓			07234895673		Message Staff	
Amanda Becker	✓					- No Mobile -	
Amelia Watson				07298345789		Message Staff	
Vicky Scorer	✓				Hol Auth	- No Mobile -	
Katie McGrath	✓	✓	✓	00567604567		Message Staff	
Wayne Molloy	✓	✓		07379706240		Message Staff	
Bela Doyle		✓		07379706240		Message Staff	
Nora Harris	✓				Assigned to Shift	- No Mobile -	
Sarah Olson	✓		✓		Assigned to Shift	- No Mobile -	

If the staff are removed from the rota due to an absence or training on the calendar, the rota will unassign them and display the reason, but the method of assigning cover remains the same.

Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug	Sat 06 Aug
Day	S: 3/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 4/4 H: 48.00/48.00	S: 4/4 H: 48.00/48.00	S: 3/4 H: 36.00/48.00
Amelia Watson	A. Wats... 07:00-19:00	Training 07:00-19:00	A. Wats... 07:00-19:00		
Nadine Khan				N. Khan 07:00-19:00	N. Khan 07:00-19:00
Amanda Becker	A. Becker 07:00-19:00				A. Becker 07:00-19:00
Courtney Wheeler	Absence 07:00-19:00				C. Whe... 07:00-19:00
Vicky Scorer		C. Whe... 07:00-19:00	V. Scorer 07:00-19:00	A. Becker 07:00-19:00	
Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00	
	Agency 07:00-19:00	S. Olson 07:00-19:00	A. Becker 07:00-19:00	S. Olson 07:00-19:00	07:00-19:00

extra shifts

You may require to add extra shifts to the rota when reacting to operational changes at the home, for example you if you are running an open day event and require extra staff. To add an extra shift:

- Click on the grey space on the rota where you want to add in the shift
- The new shift window will appear
- Choose a pre-defined shift pattern (created on the staff position) or add an **Ad-Hoc** shift where you can define the shift times

New Shift for Care Assistant on 05/08/2022

Shift

Ad-hoc

Day period

Day

Start time

10:00

End time

16:00

Duration

06:00

Add Shift

- Click the **Add Shift** button
- The rota will now be updated with the unassigned shift shown

Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug
Day	S: 3/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 4/4 H: 48.00/48.00	S: 4/4 H: 48.00/48.00
Amelia Watson	A. Wats... 07:00-19:00	Training 07:00-19:00	A. Wats... 07:00-19:00	
Nadine Khan				N. Khan 07:00-19:00
Amanda Becker	A. Becker 07:00-19:00			
Courtney Wheeler	Absence 07:00-19:00			
Vicky Scorer		C. Whe... 07:00-19:00	V. Scorer 07:00-19:00	A. Becker 07:00-19:00
Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00
	Agency 07:00-19:00	S. Olson 07:00-19:00	A. Becker 07:00-19:00	S. Olson 07:00-19:00
				10:00 - 16:00

Notice how the budget total has not yet updated to be **Blue** (over budget). Only when the shift is assigned to a staff member will the total be updated.

Staff	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug
Day	S: 3/4 H: 36.00/48.00	S: 3/4 H: 36.00/48.00	S: 4/4 H: 48.00/48.00	S: 5/4 H: 48.00/48.00
Amelia Watson	A. Wats... 07:00-19:00	Training 07:00-19:00	A. Wats... 07:00-19:00	
Nadine Khan				N. Khan 07:00-19:00
Amanda Becker	A. Becker 07:00-19:00			
Courtney Wheeler	Absence 07:00-19:00			
Vicky Scorer		C. Whe... 07:00-19:00	V. Scorer 07:00-19:00	A. Becker 07:00-19:00
Nora Harris		N. Harris 07:00-19:00	N. Harris 07:00-19:00	N. Harris 07:00-19:00
	Agency 07:00-19:00	S. Olson 07:00-19:00	A. Becker 07:00-19:00	S. Olson 07:00-19:00
				K. McG... 10:00-16:00

shift swapping

When staff members agree to swap a shift, you can update the rota in Coolcare to reflect this change.

- Click one of the two shifts you want to swap around
- Click the **Swap Shift** button

Shift Details

Date:

04/08/2022

Shift:

Day: 07:00 - 19:00

Day Period:

Day

Rota Hours:

12

Assigned Staff:

Vicky Scorer

Change Staff

Swap Shift

Unassign Staff

Delete Shift

- Use the **Filter shifts to swap** box to find the shift you want to swap with. This can be filtered by date of shift and staff name
- Select the shift you are swapping with, it will highlight in blue

Swap Shifts

Shift Details

Date: 04/08/2022

Shift: Day: 07:00 - 19:00

Day Period: Day

Rota Hours: 12

Assigned Staff: Vicky Scorer

Filter shifts to swap

Date

06/08/2022

Staff Name

Group	Position	When	Assigned Staff
Care Days	Care Assistant	06/08/2022 07:00 - 19:00	Amanda Becker
Care Days	Care Assistant	06/08/2022 07:00 - 19:00	Courtney Wheeler

- Click the **Swap Shift** button at the bottom of the box

A message will be displayed to confirm the change and the rota is now updated.

Please note: when swapping shifts, it is possible to create a rota conflict by having a staff member assigned to 2 shifts on the same day at the same time. If this does happen, a warning message will be displayed at the top of the rota and give you the details of the staff member with a rota conflict.

There are conflict/s in this range, conflicts can be identified easily in Staff View:

- Amanda Becker: 06/08/2022

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: 3/4 H: 36.00/48.00	S: 4/4 H: 48.00/48.00	S: 5/4 H: 48.00/48.00	S: 3/4 H: 36.00/48.00
Senior Carer	Amelia Watson	A. Wats... 07:00-19:00	Training 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
Care Assistant	Amanda Becker	A. Becker 07:00-19:00				A. Becker 07:00-19:00
Care Assistant	Courtney Wheeler	Absence 07:00-19:00				A. Becker 07:00-19:00

change staff

You can use the Change Staff button to change which staff member is assigned to an individual shift.

- Click on the shift you wish to change
- Click the **Change Staff** button
- Select an alternative Staff member to cover the shift; this is the same screen as choosing a staff member to cover an unassigned shift



The rota is now updated and the name on the shift will have changed.

unassign shift

To unassign a shift from a Staff member

- Click on the shift you wish to unassign

- Click the **Unassign Staff** button



The rota is now updated, the shift is unassigned (white) and the shift totals are updated to reflect the requirement for a staff member.

managing the rota – staff availability

The power of the rota combined with the use of the Staff Portal enables electronic two-way communication between the rota manager and the staff member. In addition to receiving information on those shifts already rostered, staff members can indicate on the Staff Portal that they are available to cover other shifts.

This information is helpful to the rota manager, giving them confidence to assign shifts where the staff member has indicated they are available without a call or email exchange. The rota manager is able to quickly fill a staffing need and maintain the required levels for the Home.

Please refer to the guide on the use of the Staff Portal for setup and staff use.

availability & shift cover

When managing exceptions from within the rota, the rota manager is able to identify information regarding a staff member's availability. The staff member has indicated via the Staff Portal if they are able to cover a shift or if they are available on dates to cover extra shifts that they are not normally rostered for.

To do this, click on an unassigned shift to open its details, like you would to assign a staff member to it. If there are no indicators to identify a staff member from the Shift Details, you can request for a staff member to cover a shift using the **Message Staff** button.

Where the staff members have a mobile phone number stored on the staff record, you can message the staff members if there are multiple staff available to cover a shift from here.

- Click the **Message Staff** button

Shift Details

Date: 28/05/2020

Shift: Day: 08:00 - 20:00

Day Period: Day

Rota Hours: 12

Assigned Staff: None

☒ Staff has accepted
☒ Staff has declined
☒ Staff has not responded
☒ Staff has requested

Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Message	Staff Notes
Liam Andrews	✓			07685547745		<input type="button" value="Message Staff"/>	

The staff member will receive a text message and a link to the Staff Portal. From the Staff Portal, they are able to respond to the message to indicate if they are available to cover the shift or not.

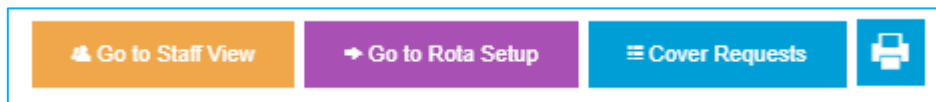
When the staff member responds, an indicator will display in the Shift Details window enabling the rota manager to make an informed decision and assign the shift.

- ✓ Staff has accepted
- ✗ Staff has declined
- ? Staff has not responded
- ! Staff has requested

Once the staff have responded, you still need to choose who to assign to the shift, Coolcare will not automatically assign staff to a shift for you.

shift requests

You can quickly see all of your shifts that have staff requests for them. This can be done by clicking the button at the top of the rota called **Cover Requests**.



This will open a new side menu that shows you the 20 soonest unassigned shifts.

This allows you to see the number of requests from the Staff Portal that have been responded to or are awaiting a response on each shift. It lists each shift, and shows how many staff have responded that they can cover the shift, are unavailable, or are yet to respond to the request.

Once you have assigned a staff member to a shift you can refresh the Cover Requests list by clicking the blue circular arrow, this will remove any shifts that you have assigned and load up to 20 unassigned shifts again.

Rota

01/03/2021

31

Default Staff

Unassigned

Holiday Request

Agency

Text staff when assigned to shift

OFF

ON

Go to Staff View

Go to Rota Setup

Cover Requests

Cover Requests

01/03/2021 18:00 - 06:00

Residential Care B12

Front of House

1 Can Cover | 0 Unavailable | 0 Awaiting

01/03/2021 09:00 - 10:00

Residential Care B12

Front of House

1 Can Cover | 0 Unavailable | 0 Awaiting

01/03/2021 09:00 - 14:00

Residential Care B12

Senior Carer

1 Can Cover | 0 Unavailable | 0 Awaiting

02/03/2021 18:00 - 06:00

Residential Care B12

Front of House

1 Can Cover | 0 Unavailable | 10 Awaiting

Position

Staff

Mon 01 Mar

Tue 02 Mar

Wed 03 Mar

▼ new

Afternoon

S: 1/1 H: 4.18/4.18

S: 1/1 H: 4.18/4.18

S: 1/1 H: 4.18/4.18

S: 1/1 H: 4.18/4.18

Night

S: 1/1 H: 12.00/12.00

S: 1/1 H: 12.00/12.00

S: 1/1 H: 12.00/12.00

S: 1/1 H: 12.00/12.00

▲ Care Manager

Sue Parker

S. Parker 15.02-19.13

S. Parker 15.02-19.13

S. Parker 15.02-19.13

S. Pa

▲ Front of House

Abbie O'Calloway

A. O'Ca... 18.00-06.00

A. O'Ca... 18.00-06.00

A. O'Ca... 18.00-06.00

A. O'

▲ Kitchen Assistant

▼ newer

Morning

S: 1/1 H: 9.00/9.00

S: 1/1 H: 9.00/9.00

S: 1/1 H: 9.00/9.00

S: 1/1 H: 9.00/9.00

▲ Senior Carer

Alexandra McDonald

A. McD... 05.00-14.00

A. McD... 05.00-14.00

A. McD... 05.00-14.00

A. Mc

▲ Front of House

▲ NVQ3

▲ Home Manager

▲ Domestic

▼ Residential Care B12

Afternoon

S: 0/1 H: 0.00/5.00

S: 0/1 H: 0.00/5.00

S: 0/1 H: 0.00/5.00

S: 0/1 H: 0.00/5.00

Morning

S: 0/1 H: 0.00/1.00

S: 0/1 H: 0.00/1.00

S: 0/1 H: 0.00/1.00

S: 0/1 H: 0.00/1.00

Night

S: 0/1 H: 0.00/12.00

S: 0/1 H: 0.00/12.00

S: 0/1 H: 0.00/12.00

S: 0/1 H: 0.00/12.00

▲ Senior Carer

09:00-14:00

09:00-14:00

09:00-14:00

▲ Front of House

09:00-10:00

09:00-10:00

09:00-10:00

▲ Front of House

18:00-06:00

18:00-06:00

18:00-06:00

messaging

CoolCare also has functionality to send staff a text message when shifts are assigned to them.

Enable the facility by moving the **Text staff when assigned to shift** slider to **ON**.

If staff members have a mobile phone number on their staff record, an SMS message will be sent to them when the shift is assigned, giving them the shift details, they have been assigned to.

☒ Default Staff
 ☐ Unassigned
 ☐ Holiday Request
 ☐ Agency

Text staff when assigned to shift ⓘ

OFF
 ☒ ON

Go to

staff view

This dynamic view of the rota is available to CoolCare users, and is a simpler view where staff who do not have access to the Staff Portal can check their assigned shifts with the rota manager or if they have access to CoolCare. To change to Staff View, click the **Go to Staff View** button at the top of the rota.

Go to Staff View

Go to Rota Setup

Cover Requests

Print

This view removes all unassigned shifts and presents a simple view of the rota in first name order. From here you can still click on a shift to change staff, swap shift, unassign staff or delete the shift.

Rota (Staff View)		02/08/2022	31	<input checked="" type="checkbox"/> Default Staff <input type="checkbox"/> Unassigned <input type="checkbox"/> Holiday Request		Agency	Go to Main View	Go to Rota Setup	Print
Staff	Main Position	Tue 02 Aug	Wed 03 Aug	Thu 04 Aug	Fri 05 Aug	Sat 06 Aug	Sun 07		
Amanda Becker	Care Assistant	Care Assistant 07:00 - 19:00		Care Assistant 07:00 - 19:00		Care Assistant 07:00 - 19:00	Care As 07:00 -		
Amelia Watson	Senior Carer	Senior Carer 07:00 - 19:00		Senior Carer 07:00 - 19:00					
Courtney Wheeler	Care Assistant		Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00			Care As 07:00 -		
Nadine Khan	Senior Carer				Senior Carer 07:00 - 19:00	Senior Carer 07:00 - 19:00	Senior 07:00 -		
Nora Harris	Care Assistant		Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00			
Sarah Olson	Care Assistant		Care Assistant 07:00 - 19:00		Care Assistant 07:00 - 19:00				
Vicky Scorer	Care Assistant				Care Assistant 07:00 - 19:00				
Katie McGrath	Care Assistant				Care Assistant 10:00 - 16:00				