assigning staff to your 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 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.

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.

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.

- Select the staff member you wish to assign
- Click the **Assign Staff** button to save

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.

assigning individual shifts.

If you aren't using shift patterns or have unassigned shifts due to holidays or absences, you can instead assign shifts individually. To do so, select an unassigned shift from the rota; these will be white.

This will open a new window, displaying all staff available to cover the shift with some additional information next to each person, as well as the option to assign the shift to agency instead.

Select the staff member you wish to assign or use the search box to find the person you want, then click them and they will be added into the shift.

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

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assigning agency staff to a 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**

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

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* guide for more information on shift definitions and day periods.

- **Green** – On budget, all shifts are assigned to staff or agency
- **Red** – Under budget, you have unassigned or deleted shifts
- **Blue** – Over budget, you have more staff on shifts 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. Kh
👤 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		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 can 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.