

managing changes to your 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.

Please Note: All absences are recorded in the calendar. Please see our *Complete 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.

finding and assigning cover to shifts.

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: 12/08/2025
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

Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Message	Staff Notes
Melissa Blair	✓		✓	- No Number -		- No Mobile -	
Maria Walker	✓		✓	- No Number -		- No Mobile -	
Jade Heath	✓		✓	- No Number -		- No Mobile -	
Deborah Cole	✓		✓	- No Number -		- No Mobile -	
Lynne Hudson	✓		✓	- No Number -		- No Mobile -	
Jody Rich	✓		✓	- No Number -		- No Mobile -	
Sharon Clay	✓		✓	- No Number -		- No Mobile -	
Vicky Scorer	✓		✓	- No Number -		- 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

managing changes to shifts.

There are multiple ways a shift can be updated once a staff member is assigned to it. These options allow you to make short-term changes to your rota's shifts, patterns and the staff members assigned to them without having to change your rota setup. These changes include changing the staff member assigned to a shift, swapping two staff members' assigned shifts, unassigning a staff member from a shift, deleting a shift from the rota and adding new shifts as well.

You can access these options by clicking a shift that is assigned to a staff member:

Shift Details ✕

Date: 12/08/2025

Shift: Day: 07:00 - 19:00

Day Period: Day

Rota Hours: 12

Assigned Staff: [Nora Harris](#)

✎ Change Staff
↔ Swap Shift
✖ Unassign Staff
🗑 Delete Shift

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



Shift Details ✕

Date: 12/08/2025

Shift: Day: 07:00 - 19:00

Day Period: Day

Rota Hours: 12

Assigned Staff: Nora Harris

👤 Covered By Agency
🗑 Delete Shift

Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Message	Staff Notes
Meilssa Blair	✓		✓	- No Number -		- No Mobile -	
Maria Walker	✓		✓	- No Number -		- No Mobile -	
Jade Heath	✓		✓	- No Number -		- No Mobile -	
Deborah Cole	✓		✓	- No Number -		- No Mobile -	
Lynne Hudson	✓		✓	- No Number -		- No Mobile -	
Jody Rich	✓		✓	- No Number -		- No Mobile -	
Sharon Clay	✓		✓	- No Number -		- No Mobile -	
Nora Harris	✓			- No Number -		- No Mobile -	
Vicky Scorer	✓			- No Number -		- No Mobile -	

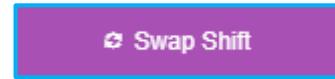
✔ Staff has accepted
✖ Staff has declined
? Staff has not responded
! Staff has requested

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

swap shift.

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

- Click one of the two shifts you want to swap around
- Click the **Swap Shift** button
- 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: 12/08/2025

Shift: Day: 07:00 - 19:00

Day Period: Day

Rota Hours: 12

Assigned Staff: Nora Harris

Filter shifts to swap

Date
 ✕

Staff Name

Group	Position	When	Assigned Staff
Care Days	Care Assistant	15/08/2025 07:00 - 19:00	Vicky Scorer
Care Days	Care Assistant	15/08/2025 07:00 - 19:00	Hilda Connors

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

A message will be displayed to confirm the change, and the rota will be 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

unassign staff.

You can unassign a staff member from a shift if they are no longer able to cover that shift, similar to how the calendar can remove staff from shifts due to holidays and absences.

- Click on the shift you wish to unassign
- Click the **Unassign Staff** button

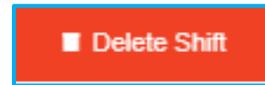


The shift will update automatically, the staff name removed and the shift displaying as white to show it is unassigned and requires cover.

delete shift.

You can delete a shift from rota if it is no longer required (e.g. if your budget requirement is temporarily reduced) or if you need to change the shift's times by replacing it with a new shift.

- 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: 12/08/2025
Shift: Day: 07:00 - 19:00
Day Period: Day
Rota Hours: 12
Position: Care Assistant
Assigned Staff: Nora Harris

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 occurrence of that 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 via the Rota Setup page.

adding extra shifts.

You may require extra shifts adding 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, or to replace a deleted shift. To add an extra shift:

- Click on the empty space on the rota where you want to add in the shift
- The new shift window will appear
- You can select a pre-defined shift (created via *Home Setup – Staff Positions*) or add an **Ad-Hoc** shift where you can define the shift start and end times yourself

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

Please Note: 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

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.

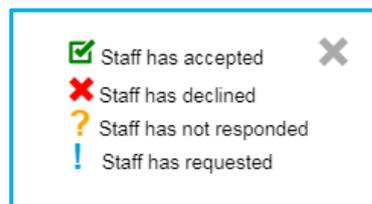
To do this, click on an unassigned shift to open its details, like you would to assign a staff member to it.

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.

Please Note: You will only have the option to message staff if they have a mobile phone number added to their staff record. This can be found in the *General* tab on the staff record.

Shift Details							
Date:	12/08/2025						
Shift:	Night: 19:00 - 07:00						
Day Period:	Night						
Rota Hours:	12						
Assigned Staff:	None						
							<input checked="" type="checkbox"/> Staff has accepted <input checked="" type="checkbox"/> Staff has declined <input checked="" type="checkbox"/> Staff has not responded <input checked="" type="checkbox"/> Staff has requested
							<input type="button" value="Covered By Agency"/> <input type="button" value="Delete Shift"/>
Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Message	Staff Notes
George Moreton	✓					- No Mobile -	
Harry Jonson	✓					- No Mobile -	
Stacy Yorke				- No Number -		- No Mobile -	
Amelia Watson				07496265978		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.



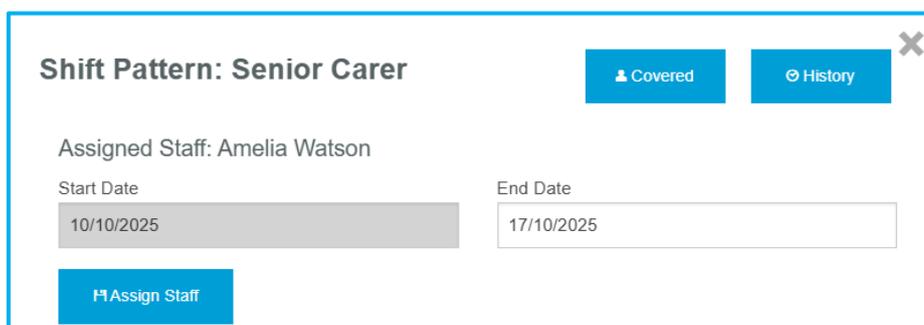
When the staff member responds, an indicator will display in the Shift Details window enabling the rota manager to make an informed decision and assign the shift.

Please Note: 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.

unassigning staff from shift patterns.

If a staff member is on a repeating shift pattern and needs to be unassigned, you can do so by ending their assignment to that pattern:

- Navigate to **Staff – Rota**
- Select the shift pattern you wish to remove the staff member from
 - The **Staff** column will have each staff member's name against their assigned shift pattern to identify them
- Add an **End Date** to the shift pattern
- Select **Assign Staff** to save



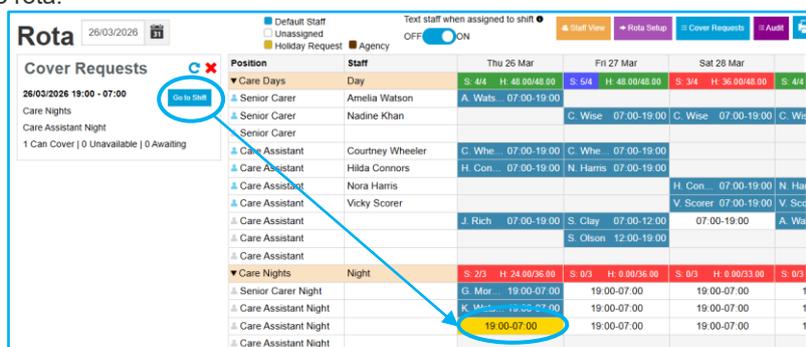
This will remove the staff member from any shifts after the selected end date.

shift requests.

You can quickly see all 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 allows you to see the details of any shifts you have sent a message to staff members to cover, or any shifts that staff have requested from the staff portal. The list will display up to 20 shifts, and shifts will be removed from the list once a staff member is assigned to them. You can also use the **Go to Shift** button next to each request to highlight the requested shift on the rota.



notifying staff of shift assignment.

CoolCare also has functionality to send staff a text message when shifts are assigned to them. You can enable this 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 details of the shift they have been assigned 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 **Staff View** button at the top of the rota.



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)		12/08/2025	31	Legend: <input checked="" type="checkbox"/> Default Staff, <input type="checkbox"/> Unassigned, <input type="checkbox"/> Holiday Request, <input type="checkbox"/> Agency				Main View	Rota Setup	Printer
Staff	Main Position	Tue 12 Aug	Wed 13 Aug	Thu 14 Aug	Fri 15 Aug	Sat 16 Aug	Sun 17 Aug			
Amelia Watson	Senior Carer	Senior Carer 07:00 - 19:00	Senior Carer 07:00 - 19:00	Senior Carer 07:00 - 19:00						
Hilda Connors	Care Assistant		Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00					
Julia Strong	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 As 07:00 -			
Vicky Scorer	Care Assistant		Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00	Care Assistant 07:00 - 19:00					

rota audit.

With this button you can see an audit trail of changes that have been made to your rota. Sorted by day, it displays any changes made to shifts on that day. This includes staff being added to shifts, the assigned staff being changed, swapped or unassigned, as well as any shifts that were deleted or added to the rota for that day.

To see the audit window, select the **Audit** button at the top of the page.



This will open the Audit Log on the left hand side of the page. You can select a day to open the list of changes made to shifts on each day. You can also use the buttons at the top of the log to filter the list for specific changes, download the log to view externally, or refresh the list to see any new changes.

Rota

06/03/2025



- Default Staff
- Unassigned
- Holiday Request
- As

Audit Log



▼ Thu 06/03/2025

- On 04/03/2025, Sam Reynolds assigned agency on a Care Assistant shift scheduled on 06/03/2025.
- On 04/03/2025, Sam Reynolds unassigned agency on a Care Assistant shift scheduled on 06/03/2025.
- On 05/03/2025, Sam Reynolds assigned agency from The Greens Carers on a Care Assistant shift scheduled on 06/03/2025.
- On 05/03/2025, Sam Reynolds changed agency on a Care Assistant shift scheduled on 06/03/2025, to Heidi Swiss.
- On 05/03/2025, Sam Reynolds assigned Heidi Swiss on a Care Assistant shift scheduled on 06/03/2025.
- On 05/03/2025, Sam Reynolds deleted a Care Assistant shift (Long Day, 07:00 - 19:00) scheduled on 06/03/2025 assigned to Heidi Swiss.
- On 05/03/2025, Sam Reynolds added a new shift for Care Assistant, scheduled on 06/03/2025 08:00 - 20:00.