

coolcare timesheet top tips.

Timesheets in CoolCare are central to your staff management. They pull information from a variety of sources and are used in important processes such as payroll. It's important to ensure your timesheets are accurate and up to date, so this guide presents some hints and tips to help you get the most out of Coolcare's timesheets, making them, and your home, run as efficiently as possible.

shift snapping & break deductions

To help your timesheets run smoothly use **shift snapping** and **break deductions**.

These can be set up to automatically recognise staff clocking in and out at the right times and deduct any breaks they may have as part of their shift. This minimises the number of manual adjustments you need to make to your timesheets.

If staff members are paid their breaks, you will not need to utilise break deductions.

Shift snapping works in 2 parts; shift definitions and snapping limits. Both settings are found in **Care Home – Home Setup**.

Shift definitions are set up for each staff position, and the snapping limits are set as an overall rule for all staff in the home. Please check our **Home Setup** guide for more information on setting up these rules.

Break deductions are setup for either the home as a whole or individual staff positions. The option you use will depend on whether all staff share the same break deductions or not. These are also set up in **Care Home – Home Setup**.

If these settings are set up correctly and staff are clocking in and out correctly, most of the entries on your timesheet will be coloured **blue**, meaning they have snapped to shift and will include any break deductions, so you should not need to make any further adjustments.

With these settings in place, you can then easily spot and focus on any exceptions, which will be **orange**. This indicates they are not snapped to shift, and breaks will not be deducted.

For more information on setting these up, check out our guides on **Home Setup** and **Rota & Timesheet Configuration**.

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what happens to shifts around BST/GMT changes?

If you have night staff doing shifts during the Greenwich Mean Time/British Summer Time changes, their shifts will require manually adjusting to compensate for the hour gained/lost.

CoolCare's timesheet hours are calculated from the clock times and don't take anything else into account, so if you do have night staff working through the clocks changing, you'll need to adjust their timesheet hours accordingly.

why isn't this shift snapping to shift?

If you are unsure why a shift is displaying as not snapped, there are a few places to check and compare:

- Check the clock times on the shift: Opening a shift on the timesheet will tell you what time a staff member clocked in and out for it. If it's not snapped, they may have clocked in late, clocked out early, or clocked at times outside of their position's shift definitions.
- Check if the hours are a holiday, absence, or training from the calendar. These will usually include a letter next to the hours on the entry (H, A, or T respectively). Hours from your calendar will not snap to shift as they do not utilise clocks.
- If the event is 0 hours, it may be a staff member that has clocked in but not clocked out. If they have forgotten to clock out, you can add a manual clock via their staff record to correct the shift on the timesheet.
- Zero-hour events could also be a calendar event (holiday, absence, training) that was deleted from the calendar, removing the hours from the timesheet.

authorising timesheets.

In addition to amending entries on the timesheet, timesheets can also be authorised.

Authorising timesheet entries is a separate permission to amending them, so you can set up CoolCare so only specific users can authorise timesheets. More information on permissions can be found in our **Users & Permissions** guide.

Authorising a shift will turn it green on the timesheet, so you can use it as a confirmation that the shift has been double-checked and the hours are correct.

While shifts do not need to be authorised as it doesn't affect anything else, it's a useful extra step for shifts that are not snapped or have been amended to confirm they have been checked.

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Additionally, you can authorise timesheets in bulk when locking the timesheet. When locking the timesheet, a tick box for **Authorise all events up to the new lock date** will be available, this option will authorise all the shifts on the timesheet up to the selected lock date.

creating an audit log for timesheet changes.

While CoolCare does not automatically track who has made changes to timesheet entries, there are steps you can take to ensure you have an audit of timesheet changes.

On every timesheet entry in CoolCare there is a notes section for any additional information relating to the shift you want to record. We recommend using this to explain any changes made to timesheet events.

Explain what the change was, why it was made as well as who made this change, either a name or just their initials. This will help identify what changes were made to shifts as well as who made them, giving you an audit trail for all changes.

Standard Hours:	<input type="text" value="11"/>	Care Assistant
Extra Hours:	<input type="text" value="0.5"/>	Care Assistant
Other Hours:	<input type="text" value="0"/>	
Notes	<input type="text" value="57/500"/>	
<input type="text" value="clocked in late but stayed late - half hour overtime - SR"/>		

reporting on clock times.

There are a couple of ways to report on staff member's clock times within CoolCare, depending on how much information you require.

If you want to see an individual staff member's recent clocks, you can see their clock history on their staff record by going to **T&A – iButton/Biometric Settings** on the staff record.

This page includes a clock history, a list of the staff member's clocks from the last 7 days. This will tell you the date/time of each clock, if it was a clock in or out, which home it was at, and whether it was a manual clock.

If you need to see clocks over a week old, you will need to use the **Timesheet Export**.

This can be run from the timesheet itself, creating a report of all timesheet events from the week displayed on the timesheet, including clock times.

For a larger date range, the timesheet export is also found on CoolCare's payroll section; select the date range on the payroll page and then run **Export Timesheet Data**. This is the same report as the export from the timesheet, just for a longer date range instead of a single week.