

changing staff between permanent and bank contracts

In Coolcare staff records can be set up as either permanent or bank staff, reflecting if they have permanent contracted hours or a bank contract. Sometimes you may need to change a staff member from bank to permanent or vice versa, which can affect some parts of the staff record. This guide explains how to do so, and what will be affected by the change.

changing the staff member's contract type

You can change the staff member's contract by going to **H.R. – Positions & History** on their staff record. You'll see a list of any previous position changes, and you can change their current position using the **+Insert** button.

General

T & A

H.R.

Payroll

Training

Documents

Vaccination

Positions and History

+ Insert

Date Effective	Position	Dept.	Payroll Number	Bank/Perm	Hours Per Week	Created / Changed By	Created / Changed Date
29/08/2022	Maintenance	Maintenance	4789	Bank	N/A	Sam Reynolds	04/11/2022
01/01/2021	Maintenance	Maintenance		Perm	30.00	Sam Reynolds	27/06/2022

You can then fill out the details of the contract change, the important part being the **Bank Staff Position** tick box. If changing from permanent to bank, you want to tick this. If changing from bank to permanent, leave this unticked and fill in the **Hours per Week** and **Average Days per Week** fields.

Position Required

Maintenance

Date Effective Required

16/08/2023

☐ Bank Staff Position

Hours Per Week Required

24

Average Days Per Week Required

4

Holiday Entitlement (days) Required

28

Payroll Number

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[Save](#)

Once filled in, you can click **Save** to update the position.



important effects of changing a staff member's contract

Once the staff record is updated, the main thing that changes is the staff member's holiday entitlement. If changing from bank to permanent, the staff member's **Current Contract Entitlement** is updated based on the contracted hours and if the change is permanent to bank, the current contract entitlement will be set to zero. The holiday entitlement will then be based on the staff member's worked hours. It is recommended to pull the holiday details report before making any contractual changes.

Holidays

General

Hours History

Holiday Year Start <small>Required</small>	01/01/2023
Holiday Entitlement (days)	28.00
Hours Per Week <small>Required</small>	24.00
Average Days Per Week <small>Required</small>	4.00
Current Contract Entitlement <small>(hours)</small> 	63.52
Holiday Brought Forward (hours)	.00
Previous Hours Accrued (hours)	3.98
Future Hours Accrued (hours)	0
Total Entitlement (hours) 	67.50

The other effect will be on Coolcare's rota. Bank staff cannot be assigned to a shift pattern on the rota, so if you change a staff member from permanent to bank, the staff member will be taken off of any shift patterns they are assigned to and can only be assigned to individual shifts. If the change is from bank to permanent, it means you'll be able to assign the staff member to a repeating shift pattern.

If changing from permanent to bank, there is one more change. Any holidays in the calendar after the date of contract change will be removed, due to holiday entitlement changes, so make note of any future holidays the staff member might have before making the change.