building a new rota in CoolCare.

This quick guide will take you through the steps required to build your rota in CoolCare. This guide will be looking at the rota setup specifically, focusing on building your rota template and the methods we suggest to do so. For full detail on the rota setup process and rota management, please see our main rota guides: *Rota Introduction & Setup, Rota Implementation* and *Managing Changes to Your Rota*.

step 1 – initial rota config.

When building your rota for the first time, or starting again from scratch after deleting the rota, the first page you will fill out is the Initial Rota Config. This will ask for 2 pieces of information: the **shift pattern start date** and **rota length**.

shift pattern start date.

This date is the start of your rota patterns, i.e. Week 1, Day 1. Selecting this date will ensure the shift patterns you create all fall into the same cycle from the date you select. This date would typically be a Monday to ensure your shift patterns run Monday – Sunday.

Please note: this date should be set in the past to ensure you can make your rota live from the date you want. The best way to determine what date you should start from is to take the date your rota is due to start from, and subtract the length of your shift patterns (e.g. due to start on 02/09 with a 14-day pattern? Your shift pattern start date should be no later than 05/08 (28 days beforehand)).

rota length.

This is the length of your rolling rota for your shift patterns to fit into. This should encompass all shift patterns you have for staff members that you'll want to create. For example, if some staff work to 2 week shift patterns whilst others work to 3 week patterns, your rota length would need to be 6 weeks (48 days).

Please note: if your staff do not have any set shift patterns to create on the rota, you can set the rota length to 7 days.

Once both fields are filled in, click **Save** to complete the config and go to the **Rota Setup (Draft View).**

step 2 – shift groups and positions.

Once you have the rota setup in the draft view, you can start building your rota. The first step in doing so is adding shift groups to break down the rota into different sections, and then adding positions under each group.

shift groups.

Use the **+Shift Group** button at the top of the page to add a shift group. These are just for organising the positions on the rota into different sections, allowing you to focus on certain groups when building the shifts and adding the staff, as well as breaking down your budget based on each group.

Examples of shift groups may be based on departments (Care, Kitchen, Housekeeping, Admin etc.,), times of day (Morning, Afternoon, Evening, Night) or location within the home (Ground Floor, 1st Floor, 2nd Floor etc.,), or any combination of these.

positions.

Once you have the shift groups, you can add positions under each one using the **+Shift Pattern** button that appears next to each group on the rota. The positions will reflect the number of shift patterns you require or your staff budget; please see the sections below on building the shift patterns or block rota for more information.

The positions available will be based on your position list found in **Care Home – Home Setup** for your home. If new positions need adding to the list, this can be done via the **Group Positions** section on CoolCare. For more information on the positions list, please see our *Home Setup in CoolCare* guide.

Rota Setup (Draft View)

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▼ Care Days 🗑 + Shift Pattern								
✖ Senior Carer		0.00						
✖ Senior Carer		0.00						
✖ Senior Carer		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
✖ Care Assistant		0.00						
▼ Care Nights 🗑 + Shift Pattern								
✖ Senior Carer Night		0.00						
✖ Care Assistant Night		0.00						
✖ Care Assistant Night		0.00						
✖ Care Assistant Night		0.00						
Budget Totals			S: 0 H: 0	S: 0 H: 0	S: 0 H: 0	S: 0 H: 0	S: 0 H: 0	S: 0

Buttons: + Shift Group | ↻ Apply Changes | ⚙ Settings | ⟲ Reset Draft

step 3 – building your shifts.

With your shift groups and positions added to the rota, you can build the shifts for the rota. There are 2 main methods for this: shift patterns or block shifts.

Shift patterns are used when staff have set, consistent patterns to work to. These fit into your full rota length and are then repeated as a set pattern on the live rota. Shift patterns are built with a specific staff member in mind, each position under the shift group having a pattern for one member of staff to work to.

Block shifts would be used for a group of staff that don't have set patterns. You would have a fixed number of staff working on a given day, but the staff on the shifts are flexible and change week to week. This would be used when you know how many staff you need to cover your shifts, but not any consistent patterns that people work to.

You can use a combination of both methods to ensure the rota reflects your staffing needs, for example 6 staff members may work to set patterns, while the rest are flexible to make up the rest of your block shifts.

To build either, you start by clicking on the position names under each group to bring up the shift pattern builder.

Shift Pattern Builder

Senior Carer in Care Days

First Shift In Pattern: Week: 1 Day: 1 (Day of pattern: 1)   ▾

ℹ **Info** - Pattern will be overriden with new shifts

Days: 0   Shift Definition: Off   ▾   ✖

+ Add Row

⊢ Build Pattern

shift patterns.

To build a shift pattern using the shift pattern builder, you create it as a number of days on and days off, going back and forth to create a pattern that fits into your full rota length. For example, if a staff member worked Monday-Friday you would build the pattern as 5 days on then 2 days off. For a more complex pattern you can add as many days on and off as you need, as long as what you have fits into your rota length specified in the initial rota config.

This is an example of a 2 week shift pattern: the staff member works Monday, Tuesday, Saturday, Sunday on Week 1, and works Wednesday, Thursday, Friday on Week 2.

Please note: The shift definitions available when creating the shift pattern are defined in **Home Setup – Staff Positions**. Each position can have selection of set shift times to ensure you can add the right shifts for each pattern. For more information on shift definitions, please see our guide *Home Setup in CoolCare.*

The pattern you create doesn't have to be for your entire rota length, only a repeating pattern that fits into it. For example, if using a 28 day rota, you can build shift patterns that are 7 days or 14 days, and they will repeat across the full 28 days.

block shifts.

To build block shifts, you still use the shift pattern builder, just in a different way. Rather than creating a set pattern, you simply fill out the entire length of the rota with the same shift every day. The easiest way to do this is to build it as a 1-day repeating pattern, using the shift definition for the shift you want filling every day.

Shift Pattern Builder

Care Assistant in Care Days

First Shift In Pattern: Week: 1 Day: 1 (Day of pattern: 1)

i **Info** - Pattern will be overriden with new shifts

Days: 1   Shift Definition: Long Day : 07:00 - 19:00 ✖

+ Add Row

✔ Pattern fits

⊢ Build Pattern

The 1 day pattern will fit into your full rota length and build a full row of shifts that need filling in. Repeat this for however many shifts you need each day to build a block of shifts you can fill with staff.

Once you've built your shift patterns or block shifts, your rota should reflect your staffing needs for the home each day.

Rota Setup (Draft View)

+ Shift Group   **↻ Apply Changes**   **⚙ Settings**   **⟳ Reset Draft**

Position	Assigned Staff	Rota Hours	Week: 1 Day: 1	Week: 1 Day: 2	Week: 1 Day: 3	Week: 1 Day: 4	Week: 1 Day: 5	Week: 1
▼ Care Days 🗑 +Shift Pattern		Day	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H: 48	S: 4 H
✖ Senior Carer		96.00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00		
✖ Senior Carer		72.00					07:00-19:00	07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00	07:00-19:00	07:00-19:00				07:00-1
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		84.00			07:00-19:00	07:00-19:00	07:00-19:00	
✖ Care Assistant		168.00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-19:00	07:00-1
▼ Care Nights 🗑 +Shift Pattern		Night	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H: 36	S: 3 H
✖ Senior Carer Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
✖ Care Assistant Night		168.00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-07:00	19:00-0
Budget Totals			S: 7 H: 84	S: 7 H: 84	S: 7 H: 84	S: 7 H: 84	S: 7 H: 84	S: 7 H

Please note: the rota setup is only for building the number of shifts you require, not assigning staff members to shifts. This is done under the **Staff – Rota** section.

step 4 – making the rota live

Once the rota is built, you will need to make it live in order to add staff to the rota and manage it day to day. In order to do so, use the **Apply Changes** button found at the top of the rota setup page. This will bring up the box to **Create Actual Rota**.
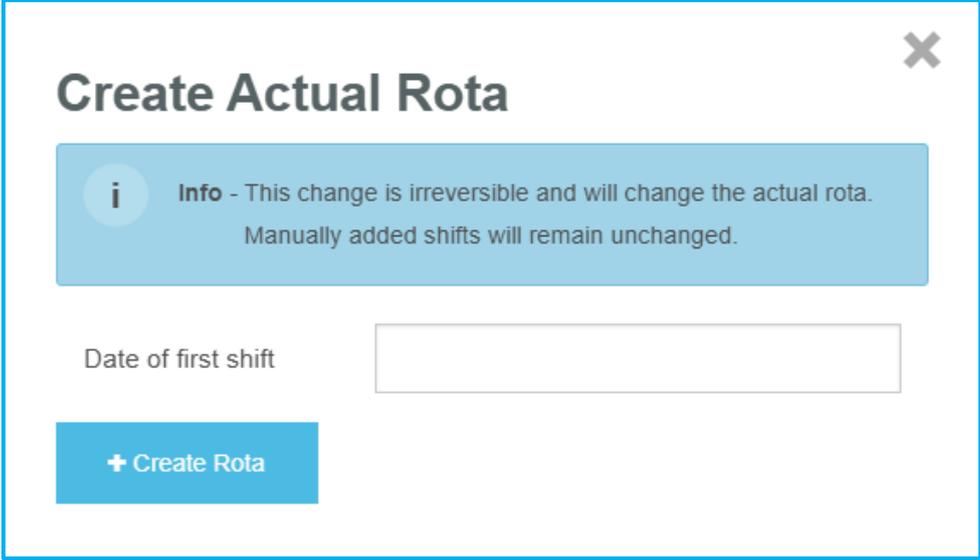
Create Actual Rota

> **i** **Info** - This change is irreversible and will change the actual rota.
> Manually added shifts will remain unchanged.

Date of first shift

+ Create Rota

This box will ask for a **Date of first shift**, asking what date the rota should be made live from. The dates you can select will be based on the shift pattern start date you chose in the initial rota config.

Please note: it is recommended to set your date of first shift in the past, typically choosing the earliest date possible. This will make your rota to be live immediately, allowing you to access the rota and add staff to it right away from whatever date you'd like. You should avoid applying the rota in the future, as you won't be able to access the live rota until the future date you select.

Once you choose a date of first shift, click **+Create Rota** and CoolCare will apply the changes and take you to your live rota found in **Staff – Rota** where you can assign staff to the rota. For more information on assigning staff to your rota, please see our guide on *Implementing a live rota* and *Managing changes to your rota.*