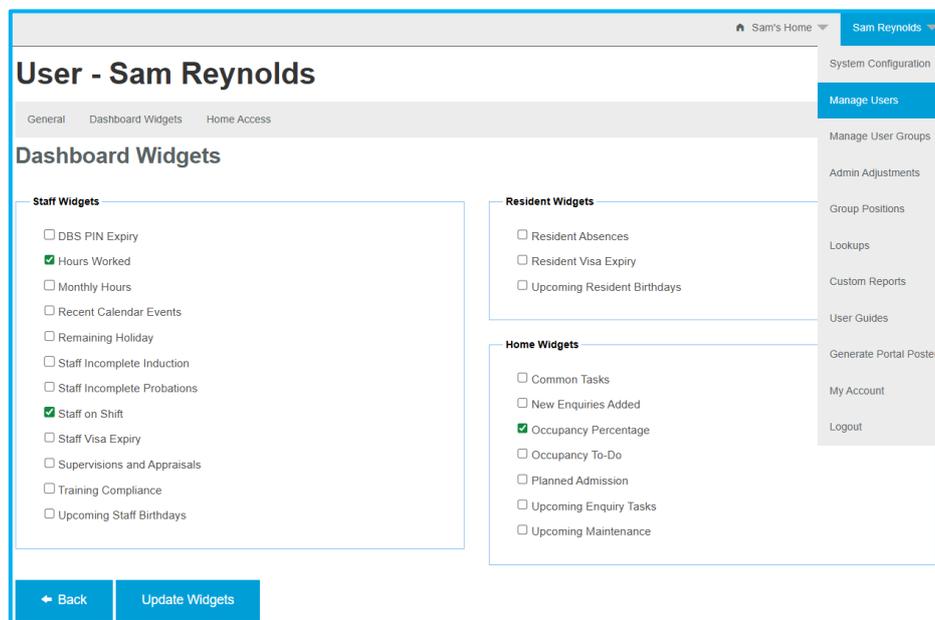# dashboard widgets in coolcare.

Whenever a user logs in to CoolCare, the first page they will see is the dashboard. This dashboard can be customised with widgets to look at different parts of the system at a glance allowing you to see what may need updating or actioning within CoolCare's records. This guide will show you how to enable widgets for users, how you can re-order them on your dashboard, and explain what each widget does.

enabling dashboard widgets.

Widgets are enabled for each user individually, allowing you to tailor them to their role and needs. To enable to widgets for a user:

- Click your name in the top-right of CoolCare to open the system menu
- Select **Manage Users** from the list
- Select the user you wish to enable widgets for
- Select the **Dashboard Widgets** tab
- Select the tick box for every widget you wish to enable for the user
- Select **Update Widgets** to save once complete

Once enabled, the user should see the widgets the next time they go to their dashboard. If they aren't seen immediately, the user may need to log out of CoolCare and log back in to update their dashboard.
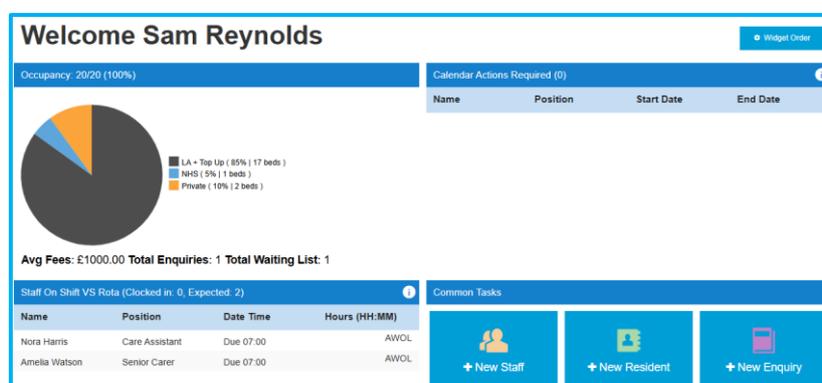
reordering widgets.

Once the widgets are enabled, the user will be able to change the order they appear on the dashboard. This can be done using the **Widget Order** button at the top right of the dashboard page:

- Navigate to the **Dashboard**
- Select **Widget Order**
- Choose the order of each widget
  - The order numbers from top-left to bottom-right, any left *Not Ordered* will be at the end after all ordered widgets
- Select **Save** when complete

Widget Order

> ℹ **Info** - Order widgets by selecting an order number. Unassigned widgets will be displayed at the bottom.

	Order
Occupancy Percentage	1 - First
Recent Calendar Events	4 - Last
Staff on Shift	2
Common Tasks	3

⊢ Save

widget descriptions.

The dashboard widgets are separated into three sections, reflecting the different sections of CoolCare: staff, residents and care home.

staff widgets.

The staff widgets look at the staff section of CoolCare, checking information on staff records, rota, timesheet and calendar.

DBS PIN expiry.

This widget checks **DBS Expiry Date** and **Pin Expiry Date** on staff records and will display any expiring within the next 16 weeks, colour coding them accordingly.

hours worked.

This widget displays worked hours from the timesheet against budgeted hours from the rota setup, separated by your departments, for the previous day. It also colour codes them based on if they are under, over, or meeting the budget.

monthly hours.

This widget shows a breakdown of hours for the current month to date, previous month to date and previous full month, allowing you to compare hours to the previous months'.

recent calendar events.

This widget looks at the calendar to check for any holiday requests or unauthorised absences that require actioning. It will show all outstanding holiday requests that have not been authorised or declined yet, and any unauthorised absences from the past 14 days.

remaining holiday.

This widget shows the ten staff members with the most holiday entitlement remaining, ordering them by highest remaining entitlement.

staff incomplete induction.

This widget checks the **Induction Start** and **End Date** on staff records, displaying any staff members within their induction. Once past their induction end date, they will no longer appear on the widget.

staff incomplete probation.

This widget checks the **Probation End Date** on staff records, showing any staff members with their probation end upcoming in the next 4 weeks, or any staff that are past their probation end that are not marked as **Passed Probation**.

staff on shift.

This widget shows any staff members currently clocked in via your clocking system, showing when they clocked in and how long they have been clocked in for. If you have a rota on CoolCare, it will also show if the staff member should be clocked in based on the rota, displaying either a tick, cross, or AWOL.

staff visa expiry.

This widget checks the **Visa Expiry** on staff records and will display any expiring within the next 16 weeks, colour coding them accordingly.

supervisions and appraisals.

This widget will check for any upcoming appraisals and supervisions on staff records, showing any to be done in the next 4 weeks or past their due date, colour coding them accordingly.

training compliance.

This widget checks the **Training** record for each staff member for any training that is incomplete or expiring soon. You can sort this widget by staff, displaying how much training each staff member must complete, or by qualification, showing how many staff need to complete each training course.

upcoming staff birthdays.

This widget shows any staff member with an upcoming birthday in the next three months, colour coding them accordingly.

resident widgets.

The resident widgets look at the information on the resident records.

absent residents.

This widget displays any residents that are currently absent from the home, checking for any that have an absence that has begun but not ended.

resident visa expiry.

This widget checks the **Visa Expiry** on resident records and will display any expiring within the next 16 weeks, colour coding them accordingly.

upcoming resident birthdays.

This widget shows any resident with an upcoming birthday in the next three months, colour coding them accordingly.

home widgets.

The home widgets look at information found in the care home section, checking occupancy, enquiries and maintenance.

common tasks.

This widget contains three buttons to help you easily navigate CoolCare, allowing you to create a new staff member, resident or enquiry.

new enquiries added.

This widget shows any enquiries added to CoolCare within the past week, displaying some basic details of the enquiry.

occupancy percentage.

This widget shows an overview of the home's occupancy, displaying your current occupancy, a breakdown based on resident funding types, average weekly fee, and number of active enquiries you have in your system.

occupancy to-do.

This widget checks enquiries for any tasks that are planned for today or past their due date, colour coding them accordingly.

planned admission.

This widget displays any admissions planned from the enquiries, showing the admission date and some basic details of the new admission.

upcoming enquiry tasks.

This widget checks enquiries for any tasks that are upcoming in the next month, or past their due date, colour coding them accordingly.

upcoming maintenance.

This widget will show any maintenance tasks planned to be done within the next twenty days, colour coding them accordingly.