

staff reports in coolcare.

CoolCare offers lots of reporting options for staff records, enabling you to run important information for your business in a few clicks of a button. To run any of these reports navigate to the **Staff** section and then **Reports** on the left-hand side of the screen.

When you print off the reports that display as a CSV file these are downloaded. If you cannot find the report when you have clicked to print it, press **Ctrl+J** on your keyboard. This should open the downloads list in your browser and if the report has downloaded correctly, it will be displaying at the top of this list.

Please Note: You can use the **Show Descriptions** button to display a detailed description for each report.

staff details reports.

The first section of staff reports are staff details, looking at the general information in staff records.

full staff details.

This report is a full export of the details of each current staff member. This report can be run at home level to see all staff in a single home, company level to see staff from multiple homes in one company, or at group level to see all staff records in the entire group. It will include information from most of the fields in each staff record.

staff contact details.

This report collates the contact information of each staff current member in the home, found on the general tab of each staff record. This includes telephone numbers, email addresses and home addresses.

staff missing information.

This report collates a variety of information from staff records, looking for any incomplete or out of date specific fields. This includes DBS checks, nurse PINs, probations and induction periods, visa expiries as well as appraisals & supervisions. It will also include if the staff member has a current ongoing absence, which may explain why these fields are missing/expired.

appraisals & supervised sessions.

This report shows the history of each staff member's appraisals and supervisions, including staff leavers. It will show each supervision and appraisal each staff member has had and full details of each one.

covid vaccination status.

This report collates the data from the vaccination page of each current staff record. It includes the dates of staff member's covid vaccination as well as their most recent booster. For unvaccinated staff it will show the reason why they did not have the vaccination and the date this was last checked with the staff member.

absence and holiday reports.

The second section of reports look at staff holidays and absences.

staff absence.

This report will show any absences from the calendar for the chosen date range. You can choose whether it includes staff leavers and gives the full details of each day of each absence, as well as the staff member's current Bradford factor score.

holiday details.

This report collates each staff member's holiday entitlement from the holidays page of their staff record, showing their entitlement for the full year, what they have used already, and what they have remaining. If you select the PDF version of this report, it will also include details any holidays taken by staff members between the dates chosen when running the report. If you run the CSV version, the dates are still required but do not influence the report's output.

holiday accrual.

This report gives a more detailed breakdown of a staff member's holiday entitlement and accrual between a specified date range. It also requires an accrual date, which the report uses to work out how much holiday the staff members have taken up to that specific date, but doesn't include any future holidays past that date that are already booked.

training reports.

The next set of reports focuses on staff training.

training matrix.

This report can show you all the training for all staff members; what has been done, what is incomplete, expired or expiring soon. The report can be filtered to look at specific staff positions and training courses, including the training marked as mandatory or additional for each position. If a training course has an expiry date, it will show that in each field and colour code it accordingly.

Please Note: This report cannot be directly exported from CoolCare, but the data can be copied/pasted into a spreadsheet and will keep the formatting and colour coding.

training exception report.

This report will show every training course for each staff member that is either incomplete, expired or expiring soon, showing the expiry date for each one.

achieved training.

This report shows a record of all completed training for every staff member, including historic records for current staff and all leavers.

staff hours and timesheet reports.

The next set of reports looks at the staff hours and timesheets in different ways, exporting them in a variety of reports.

bank staff hours.

This report shows the number of hours worked by any bank staff in a selected date range.

in home between dates.

This report identifies which staff members were working in the home between a selected date range, based on their clocking and timesheet data.

budget vs planned.

This report compares the budgeted hours from the rota setup with the planned hours from the live rota, to show if the home's planned shifts were over or under its original budget.

budget vs timesheet.

This report compares the budgeted hours from the rota setup with the actual worked hours from the timesheet, to show if the hours worked by staff were over or under the original budget.

planned vs timesheet.

This report compares the planned hours from the live rota with the actual worked hours from the timesheet, to show if the hours worked by staff were over or under the planned rota.

timesheet totals.

This report collates hours from the timesheet for each staff member over a selected date range, separating them into the different types of hours available. The report also compares worked and contracted hours, to see if a staff member has worked over or under their contracted hours in the given date range.

vacancy tracker.

This report shows staff starters and leavers to identify staff turnover as well as looking at the rota for gaps to highlight potential staffing needs within the home.

staff pool hours.

This report shows hours worked by pool staff in this home. It will show any staff in this home that have pool positions in other homes in the group, and how many hours they have worked outside of this home.

staff hours analysis.

This report compares the budgeted hours from the rota setup, the planned hours from the live rota and the actual worked hours from the timesheet all in one. You can see whether the rota hours were under or over budget, and then the worked hours compared to both. This report will show the hours for the entire home as well as separate tabs for each staff department within the home.

rota pattern assignment gaps.

This report highlights any gaps in the rota to point out any potential staffing needs. It will show where the rota has a shift pattern that is unassigned and how long it is unassigned for. It will also display if there are any open vacancies for the position from the recruitment page.