

# STAFF DIARIES



Go > Home > Day Planner > Staff Diaries >

The Staff Diaries function tracks essential information about holidays, absences, appointment and reminders for the setting staff.

The diary has two calendar views where you can see and add diary items.

The screenshot shows the 'Staff Overview' calendar interface. At the top, there are tabs for 'Calendar', 'Holidays', 'Sickness', 'Planned Absence', 'Appointments / Reminders', and 'Group Events'. Below these is a dropdown menu for 'Staff Overview' and buttons for 'Toggle Workflow' and 'Toggle Sidebar'. A 'Year View' section shows 'September 2012' with navigation arrows. The main area is a calendar grid with days of the week (Su, Mo, Tu, V..., Th, Fr, Sa, Su, Mo, Tu, V..., Th, Fr, Sa, Su, Mo, Tu, V..., Th, Fr, Sa, Su, Mo, Tu) and dates from 1 to 30. The right-hand side contains 'Calendar Options' with a 'Filters' section. The filters are: Holidays (checked), Lieu Days (checked), Sickness (checked), Absences (checked), Events (checked), Appointments (checked), Reminders (checked). At the bottom of the filters, there are radio buttons for 'All Staff' (selected) and 'Individual Staff Member'.

The screenshot shows the 'Holiday Planning' calendar interface. It features a dropdown menu for 'Holiday Planning' and buttons for 'Toggle Workflow' and 'Toggle Sidebar'.

The **Holiday Planning calendar** is used to manage holidays and lieu / carry forward days. Please see the **Staff Holidays mini guide**.

The screenshot shows the 'Staff Overview' calendar interface, identical to the one shown in the main screenshot above.

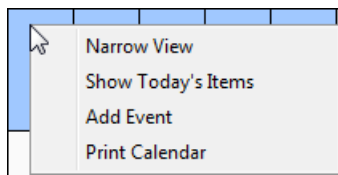
The **Staff Overview calendar** is described in this mini guide. It used to manage other types of diary entry.

- **Sickness** Tracks doctors notes, estimated & actual return dates.
- **Planned Absence** Compassionate, unpaid, education, maternity / paternity and 'other' absence.
- **Appointments** Appointments that do, or do not affect availability (e.g. peer observation).
- **Reminders** Simple calendar reminders.
- **Group Events** Multiple staff doing something together (e.g. first aid training, group hug).

*(The diaries shown here are from the Quick Start tutorial data.)*

# Colours Used On The Staff Overview Calendar

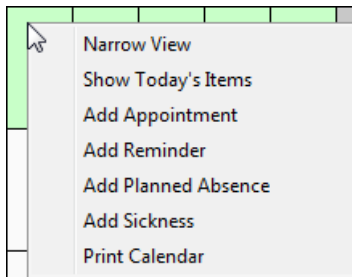
The Staff Overview calendar days are coloured as follows:



## Blue Days

Days are shown in blue if All Staff are selected.

The calendar has a short right-click menu when showing All Staff. This has the usual zoom in/out and print functions. It also has the ability to add a staff event. (These can include multiple staff members.)



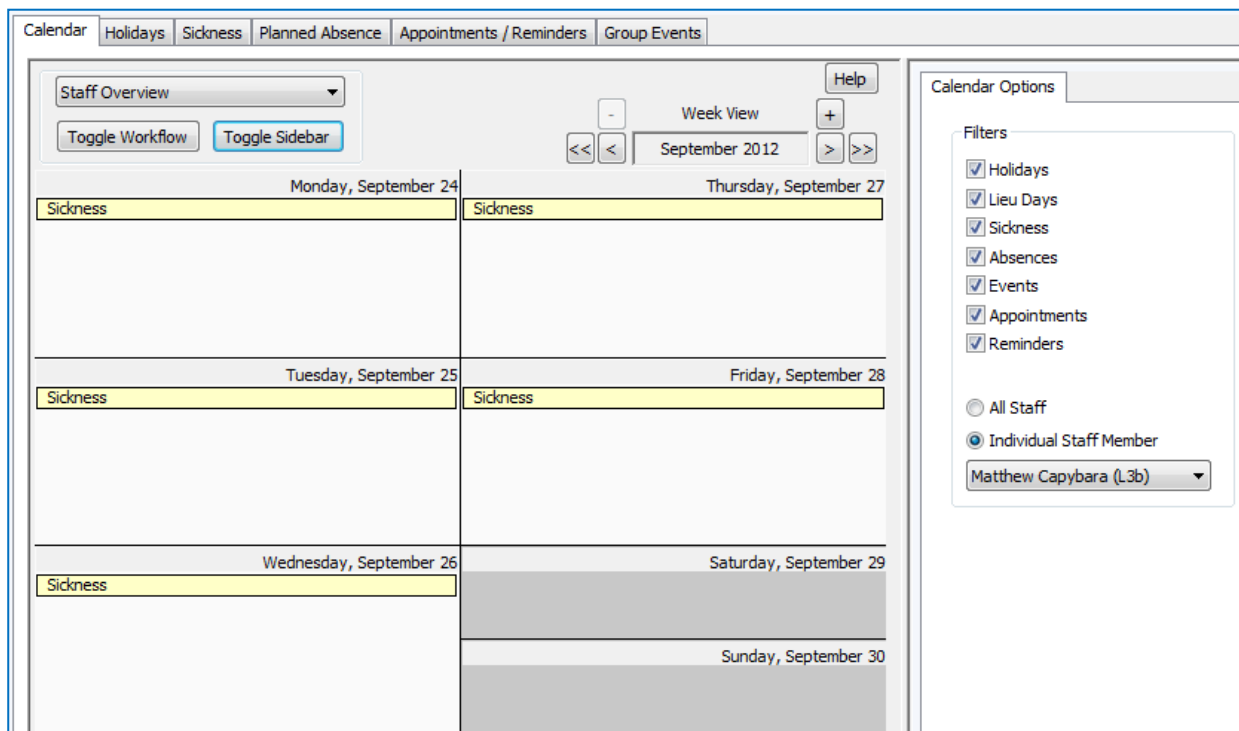
## Green Days

Days are displayed in green if an individual staff member is selected.

This has a longer right-click menu which allows you to add appointments, reminders, planned absence and sickness for the selected staff member.

The Staff Overview calendar navigates in the usual way and the sidebar allows you to choose which options are displayed on the calendar.

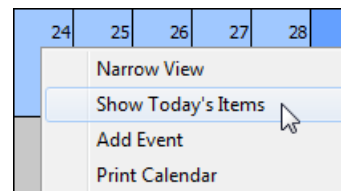
The calendar lists the day's entries when the calendar is in Weekly View with an individual staff member selected.



**Note:** Although holidays and lieu days are managed from the Holiday Planning calendar they are displayed on this calendar too to help avoid making appointments for staff who are on leave.

## Show Today's Items

You can produce a detailed summary that you can print by using the right-click menu option to 'Show Today's Items' in any calendar view.

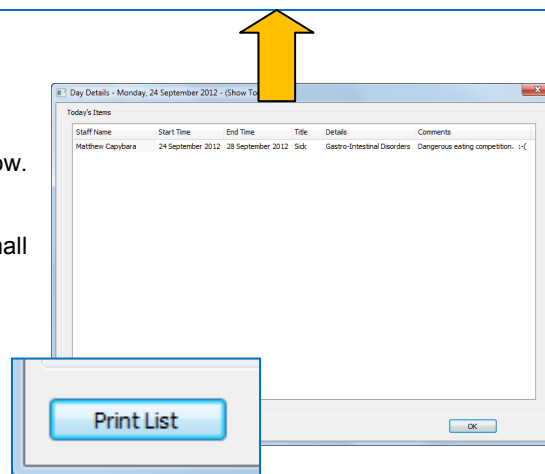


Today's Items					
Staff Name	Start Time	End Time	Title	Details	Comments
Matthew Capybara	24 September 2012	28 September 2012	Sick	Gastro-Intestinal Disorders	Dangerous eating competition. :-{

The day's diary items will be listed in detail in a pop-up window. This list shows much more detailed list than the calendar.

(You should be aware that the calendar days may be too small to show the entire list.)

You can use the Print List button to produce a detailed list of the day's items which may be useful in the setting.



**Staff Diary 24-Sep-2012**

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Kidspace 

These are the staff diary details for 24-Sep-2012 Printed: 02-Jul-2012, 9:35 am

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**Sickness (1)**

24 September 2012 - 28 September 2012 **Matthew Capybara**  
 Gastro-Intestinal Disorders *Dangerous eating competition. :-{*

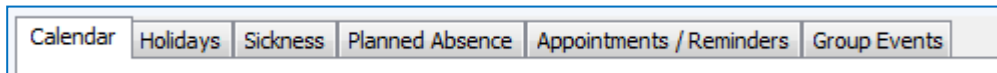
The day's diary items are grouped by type, holiday, sickness, planned absence, etc. Here there is just 1 sickness item.

**Sickness (1)**

24 September 2012 - 28 September 2012 **Matthew Capybara**  
 Gastro-Intestinal Disorders *Dangerous eating competition. :-{*

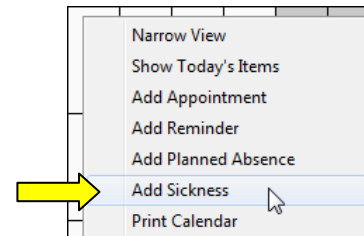
## Making Diary Entries

The easiest way to make and see diary entries is to use the Calendar tab. You can also add and remove entries using the other tabs, but their main purpose is to list and filter the diary entries for your convenience.



## Recording Sickness

To add a period of sickness to a staff diary choose the staff member in the calendar sidebar and right click on the calendar day concerned. Choose 'Add Sickness' from the pop-up menu.



A window will pop up for you to enter the sickness details.

Timings

Start date: Mon, 24 September 2012

Estimated Return: Fri, 28 September 2012

Actual Return: Mon, 01 October 2012

Sickness Reason

Gastro-Intestinal Disorders

Doctor's Note

Note received Note received on: Tue, 25 September 2012

Comments

Dangerous eating competition. :-{

OK Cancel Help

Periods of sickness have start and end dates and possibly review dates if the absence is a long one.

Enter these dates, choose a reason for the absence and add any useful comments.

If you receive a doctor's note edit the sickness from the sickness tab and add the date that the note was received.

As sickness may be work related it is important to record the correct reason for the sick leave, the choices are shown below. If the reason does not fit well into one of these categories choose 'Miscellaneous' and add an appropriate comment to explain the nature of the illness.

Sickness Reason

Injury - off duty

Cold / Flu / Viral Infections

General Infections

Blood, Heart and Blood Vessel Disorders

Respiratory Disorders

Neurological Disorders

Migraines / Severe Headaches

Nervous Disorders

Stress Related

Gastro-Intestinal Disorders

Muscle or Bone Disorder excluding back pain

Back Pain

Repetitive Strain Injury

Injury - on duty

Injury - off duty

Neoplastic Disorders

Metabolic Disorders

Urinary Disorders

Ear, Nose, Throat or Eye Disorders

Skin Disorders

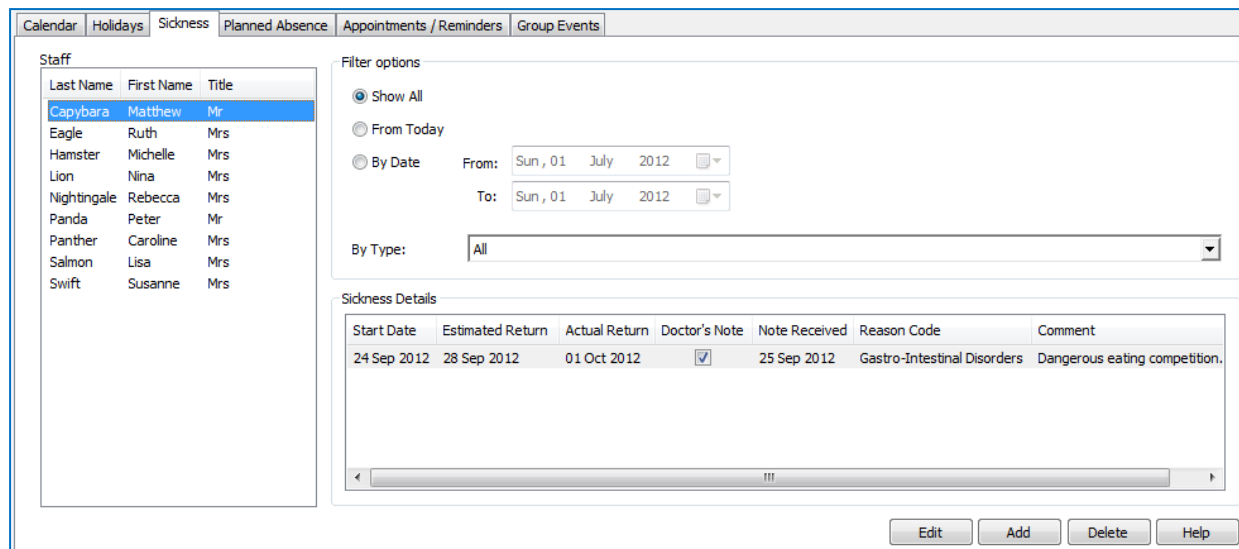
Gynaecological Disorders

Miscellaneous

Dental

You can work with a complete list of sickness absences for each staff member from the Sickness tab.

This is the place that you would come to edit a sickness record to add the date a doctor's note is received, to post a new review date or simply to look at a staff member's sickness record.

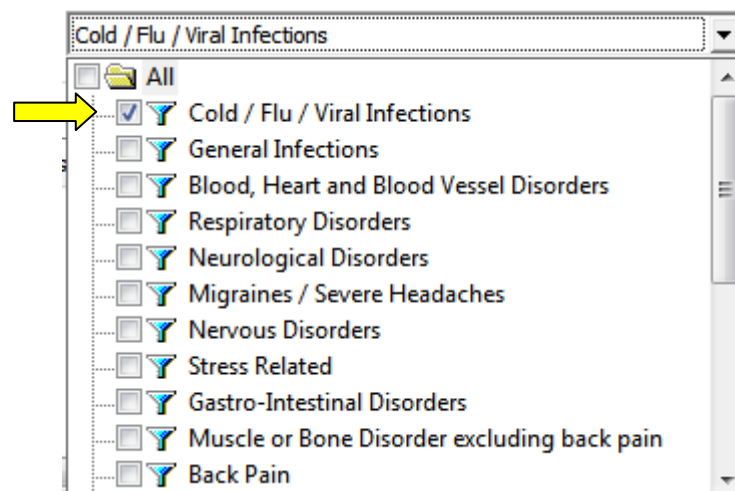


In common with the other diary tabs you can filter the absences displayed in the list on the tab. You can show:

- All sickness absence records.
- Today's and future sickness absence records.
- Sickness absence records in a date range of interest. (Staff member was sick between A and B.)

The sickness, planned absence, and appointments / reminders tabs also allow you to filter by reason or type.

To use these filters click on the drop down list arrow and then tick or un-tick the categories that you wish to see in the list.



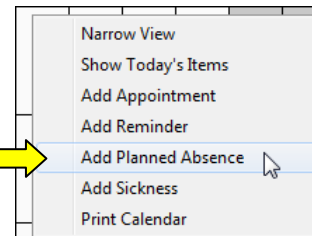
In the example above we have just chosen one reason 'Cold / Flu / Viral Infections'.

**\* IMPORTANT \***

If you have any entries in the 'Injury on duty' category these should be reviewed by the setting manager.

## Planned Absence

To add a planned absence to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Planned Absence' from the pop-up menu



The dialog box contains the following fields:

- Timings:**
  - Start date: Mon, 20 May 2013
  - End Date: Fri, 24 May 2013
  - Review Date: Mon, 20 May 2013
- Notes:** Matthew's EYPS study leave
- Absence Reason:** Education
- Buttons: OK, Cancel, Help

Planned absences may span many days and, if it is a long absence it may require review.

Enter a start, end and review date if appropriate.

Choose an absence reason and add any notes that you might find helpful.

The reasons for absence that you can choose are shown below. If the reason does not fit well into one of these categories choose 'Other' and add an appropriate comment to explain the nature of the planned absence.

The 'Absence Reason' dropdown menu is open, showing the following options: Education (selected), Compasionate Grounds, Unpaid Leave, Education, Maternity / Paternity, and Other (See Notes).

The planned absences always affect availability to work normally. You can work with a full list of absences for each staff member on the 'Planned Absence tab' as shown below.

The interface shows the 'Planned Absence' tab with the following components:

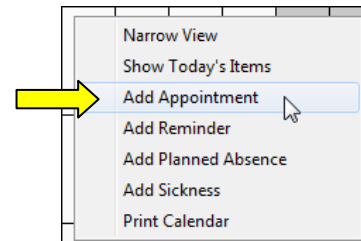
- Staff List:**

Last Name	First Name	Title
Capybara	Matthew	Mr
Eagle	Ruth	Mrs
Hamster	Michelle	Mrs
Lion	Nina	Mrs
Nightingale	Rebecca	Mrs
Panda	Peter	Mr
Panther	Caroline	Mrs
Salmon	Lisa	Mrs
Swift	Susanne	Mrs
- Filter options:**
  - Show All
  - From Today
  - By Date: From: Sun, 01 July 2012 To: Sun, 01 July 2012
  - By Reason: All
- Absence Details Table:**

Start Date	End Date	Review Date	Absence Reason	Notes
20 May 2013	24 May 2013	20 May 2013	Education	Matthew's EYPS study leave
- Buttons: Edit, Add, Delete, Help

# Appointments

To add an appointment to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Appointment' from the pop-up menu.



Add a title, description and start and end times for the appointment.

The dialog box is titled 'Details' and 'Timings'. It contains the following fields:

- Title:** Matthew's 360 degree
- Description:** Performance assessment & 360 degree feedback
- Date:** Tue, 19 March 2013
- Start time:** 16:00
- End time:** 17:00
- Affects Availability

Buttons at the bottom: OK, Cancel, Help.

Some appointments may or may not affect the staff member's availability to work (e.g. peer review may involve normal working).

Use the 'Affects Availability' check box to indicate whether or not the staff member can be scheduled to work normally in the setting.

Appointments and reminders are both listed on the Appointments / Reminders tab. You can use the 'By Event Type' filter to show either or both. The 'Impact' column denotes whether the event has an impact on normal availability to work.

The screenshot shows the 'Appointments / Reminders' tab. On the left is a 'Staff' list with 'Capybara, Matthew, Mr' selected. The 'Filter Options' section includes:

- Show All
- Today Only
- By Date (From: Sun, 01 July 2012; To: Sun, 01 July 2012)
- Show Only Entries Affecting Availability
- By Event Type: All

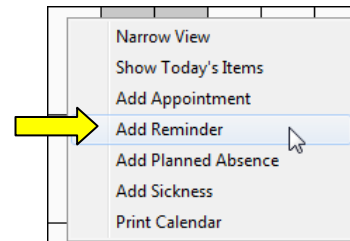
The 'Appointment / Reminder Details' table is shown below:

Start Date	End Date	Duration	Impact	Type	Title	Description
19 Mar 2013	19 Mar 2013	16:00 - 17:00	<input checked="" type="checkbox"/>	Appointment	Matthew's 360 degree	Performance assessment
14 Jun 2013	14 Jun 2013	08:00	<input type="checkbox"/>	Reminder	Course evidence date	Matthew's course evidenc

Buttons at the bottom: Edit, Add Appointment, Add Reminder, Delete, Help.

## Reminders

To add a reminder to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Reminder' from the pop-up menu.

A dialog box titled 'Details' and 'Timings' is shown. The 'Details' section has a 'Title' field with 'Course evidence date' and a 'Description' text area with 'Matthew's course evidence due today'. The 'Timings' section has a 'Date' field with 'Fri, 14 June 2013' and a 'Start time' field with '08:00'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Reminders are very simple, they just have a title, date, time and description.

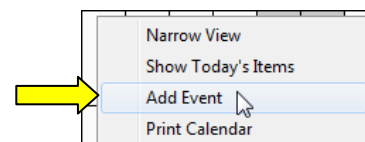
The reminders are listed together with the appointments on the Appointments / Reminders tab. You can use the 'By Event Type' filter to choose to display one or the other.

The screenshot shows the 'Appointments / Reminders' tab. On the left is a 'Staff' list with 'Capybara, Matthew, Mr' selected. The 'Filter Options' section has 'Show All' selected and a 'By Event Type' dropdown set to 'All'. Below is a table of 'Appointment / Reminder Details' with columns for Start Date, End Date, Duration, Impact, Type, Title, and Description. The table contains two rows: one for an appointment on 19 Mar 2013 and one for a reminder on 14 Jun 2013. At the bottom are buttons for 'Edit', 'Add Appointment', 'Add Reminder', 'Delete', and 'Help'.

## Group Events

Events involve more than one staff member (e.g. training courses). They are just like multi-person appointments. You can set these up from the calendar with the 'All Staff' option selected.

With the **All Staff** option selected on the calendar sidebar right click on the calendar day concerned and choose 'Add Event' from the pop-up menu.





Just like an appointment you will need to enter a title, description, start and end times. If the event affects availability to work in the setting tick the 'Affects Availability' box. (This example event is on a weekend).

Lastly you will need to choose the participating staff members. Select staff from the left hand side 'Available Staff' and use the >> arrow button to move them into the right hand column 'Attendees'. (And vice versa.)

You can see all of the scheduled events from the Group Events tab as shown below. Click on the event in the Event Details list to see the staff members who are attending the event.

**End**