

Staff portal – administrator user guide

Staff portal (administrators) overview

The staff portal enables employees to view CoolCare calendar events e.g., training, holidays, holiday requests, absences, as well as rostered shifts.

Staff Portal displays available shifts as well as the ability to raise a holiday request.

The purpose of this document to guide Administrators to enable the functionality for Staff Members.

Note – this document does not replace the registration process that each staff member must complete. Guidance for this process is detailed in the Staff Portal – Staff Guide document.

Setting up staff portal users in coolCare

It is recommended that a communication be setup to all Staff Members who may use the Staff Portal. The information should include:

- A Copy of the Staff Portal – Staff Guide Document
- Their unique registration key
- The website (URL) of where to access the Staff Portal

Note, Staff Portal is specific to each customer and applied at the Group Level. If it is the requirement to only use Staff Portal in some of the Group homes or indeed just some staff members, staff cannot access this functionality without registering and having the unique registration key.

Staff records

A new field and button are now shown on the Staff Record

- Click on 'Staff' from the left-hand menu
- Choose 'Staff Record'
- Identify and open a Staff member where access to the Staff Portal is required
- Click on the 'H.R.' drop down list
- Choose 'Employment Details' from the list

Portal registration code

The 'Portal Registration Code (Case-Sensitive)' field is now completed with a mixed case code
This code is unique to this staff member
You cannot edit this field and it is greyed to prevent change

Note - The Registration code is case sensitive and registration will fail if the password is not supplied correctly.

The screenshot shows the 'Employment Details' page for 'Payroll Number: 1'. The page is divided into several sections:

- DBS:** Includes fields for 'Form Sent to DBS Date' (17/11/2019), 'DBS Issued Date' (05/01/2020), 'DBS Expiry Date' (05/01/2023), 'Passed Police Check (DBS)' (checked), 'DBS Status' (Active), and 'DBS Reference Number' (6544558).
- Employment:** Includes fields for 'P45 Received Date', 'Notice Period' (1 Week), 'Contract Returned Date', 'Inductions Start Date' (01/01/2020), and 'Portal Registration Code (Case-Scenarios)' (MDAwMDEx). A blue circle highlights the 'Reset Portal Password' button below this section.
- Probation:** Includes fields for 'Probation Length' (3 Months), 'Probation End Date' (01/03/2020), and 'Probation Review Date' (01/03/2020).
- Registered Professional:** Includes a 'Nurse Category' field.
- Signed Contracts:** A section at the bottom of the page.

Staff portal (URL)

To access the Staff Portal, type the company specific URL in your mobile phone or PC browser. Supported browser types include Chrome for Android and PC, Safari for Apple product.

- Coolcare4.com/xxxxxxx/portal
- Where xxxxxxx is the name of your CoolCare database
- If your database name is not known, please contact CoolCare Support for assistance

Note – ensure the URL is typed correctly in to the browser address, the word 'portal' is case sensitive

Staff portal log on

Now you have successfully loaded the Staff Portal screen, user registration can begin. Refer to the 'Staff Portal – Staff Guide' for more information.

The screenshot shows the 'Staff Portal Login' screen. The page has a blue background with the Coolcare logo and the text 'admin made easy'. The main heading is 'Staff Portal Login'. Below the heading are three input fields:

- Customer Reference:** _trainingdatabase
- Username:** Paul Brennan
- Password:** Masked with dots

At the bottom of the form is a 'Login' button. Below the button are two links: 'Don't have an account? Register here' and 'Need help saving this page? Click here'.

Forgotten password

If a staff member forgets their password

- Open the Staff Record
- Click the 'Reset Portal Password' button to reset the new unique code.
- Provide the unique code to the staff member
- The staff member can now re-register via the Staff Portal

Remember – the unique registration key is case sensitive and must be typed correctly.