

# 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.**

**Staff Records**

Payroll Number: 1

General T & A H.R. Payroll Training Documents

**Employment Details**

**DBS**

Form Sent to DBS Date: 17/11/2019

DBS Issued Date: 05/01/2020

DBS Expiry Date: 05/01/2023

☒ Passed Police Check (DBS)

DBS Status: Active

DBS Reference Number: 6544558

**Employment**

P45 Received Date:

Probation Length: 3 Months

Notice Period: 1 Week

Probation End Date: 01/03/2020

Contract Returned Date:

☐ Passed Probation

Inductions Start Date: 01/01/2020

Probation Review Date: 01/03/2020

Portal Registration Code (Case-Screening): MDAwMCEX

[Reset Portal Password](#)

**Registered Professional**

Nurse Category:

**Signed Contracts**

## 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 xxxxxxxx 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.

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admin made easy

# Staff Portal Login

Customer Reference  
\_trainingdatabase

Username  
Paul.Brennan

Password  
\*\*\*\*\*

[Login](#)

Don't have an account? [Register here](#)

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.**