staff portal – admin user guide.

The staff portal enables employees to view CoolCare calendar events e.g., training, holidays, holiday requests, absences, as well as rostered shifts. It displays available shifts as well as the ability to raise a holiday request.

This guide is for administrators to enable the functionality for staff members and reset any portal user logins.

Please Note: This document does not replace the registration process that each staff member must complete. For more details on staff registering and using the staff portal, please see our *Staff Portal Employee Guide*.

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 Employee User Guide
- Their unique registration key (see below)
- The website (URL) of where to access the staff portal

Please Note: The staff portal is specific to each customer and applied at the Group Level. If it is the requirement to only use the staff portal in some of the group's homes or indeed just some staff members, staff cannot access this functionality without registering by using the unique registration key.

finding the staff portal registration code.

The staff portal can be accessed by a staff member as soon as they have a staff record on CoolCare. The registration code is found on their staff record:

- Navigate to **Staff** – **Staff Records**
- Select the staff member you wish to view
- Navigate to **H.R.** – **Employment Details**

In the **Employment** section of this page, you'll find the **Portal Registration Code (Case-Sensitive)** field, as well as the **Portal Username**. The registration code is unique to each staff member, and the main requirement the user needs to register for the portal. The username is created based on the staff member's forename and surname but is also given to the user when registering for the portal, so not required.

Please Note: The registration code is case sensitive, and registration will fail if the code is not entered correctly.

portal registration code reporting.

If you want to see all of the portal registration codes for your staff members all in one place, they are available on the **Full Staff Details** report on your **Staff Reports** page.

The portal registration codes can be found on column **CK** of the report:

CD	CE	CF	CG	CH	CI	CJ	CK
Other	ID Card	Expiry of ID Card	Passport on File	Passport Number	Passport Expiry	Recruitment Source	Portal Registration Code
	No		No				MDAwMDM3
	No		No				MDAwMDM5
	No		No				MDAwMDQw
	No		No				MDAwMDQx

staff portal URL.

You can find the URL to access the staff portal on CoolCare on a poster with a QR code for your staff to scan to access the portal on their mobile device.

- Select your name in the top right corner of CoolCare to open the system menu
- Select **Generate Portal Poster**

This will create a PDF you can save and share with your staff. It includes the URL to access the portal, as well as a QR code they can scan to easily access it on their mobile device. Once staff members have accessed the portal, it is recommended they favourite/bookmark the page for easy access in the future.

Please Note: For more information on registration and accessing the portal, please see our Staff Portal Employee Guide.

resetting a forgotten password.

If a staff member forgets their password:

- Navigate to **Staff** – **Staff Records**
- Select the staff member you wish to view
- Navigate to **H.R.** – **Employment Details**
- Click the **Reset Portal Password** button to reset the login
- Provide the portal registration code to the staff member – this remains the same even after resetting the login
- The staff member can now re-register via the Staff Portal

Portal Registration Code (Case-Sensitive)	Portal Username
MDAwMDQ4	Amelia.Watson

Reset Portal Password