

staff portal - staff user guide.

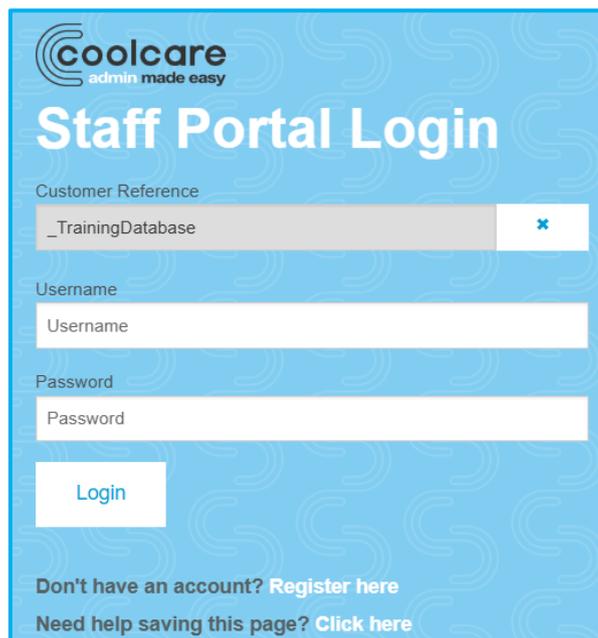
The staff portal enables employees to view CoolCare calendar events e.g. training, holidays, holiday requests, absences, as well as rostered shifts. The staff portal also displays available shifts as well as the ability to raise a holiday request.

staff portal registration.

Before staff members can use the portal, each staff member must register on the portal site. Staff members can register via Chrome on a PC device/Android mobile phone device or Safari if using an Apple computer/mobile phone.

Enter the website (URL) in your supported browser to locate the staff portal.

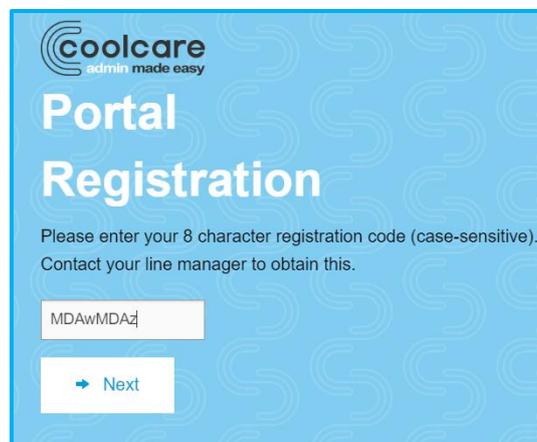
Please Note: The staff portal URL and registration code is supplied by the home administrator.



The screenshot shows the 'Staff Portal Login' page. At the top left is the CoolCare logo with the tagline 'admin made easy'. The main heading is 'Staff Portal Login'. Below this are three input fields: 'Customer Reference' with the value '_TrainingDatabase', 'Username' with the value 'Username', and 'Password' with the value 'Password'. A 'Login' button is positioned below the password field. At the bottom, there are two links: 'Don't have an account? Register here' and 'Need help saving this page? Click here'.

Click **Register here** to access the registration page:

- Enter your registration code supplied by your care home administrator
- Click **Next**



The screenshot shows the 'Portal Registration' page. At the top left is the CoolCare logo with the tagline 'admin made easy'. The main heading is 'Portal Registration'. Below this is a text prompt: 'Please enter your 8 character registration code (case-sensitive). Contact your line manager to obtain this.' There is an input field containing the registration code 'MDAwMDAz'. Below the input field is a 'Next' button with a right-pointing arrow.

- Take note of your **Username** for future reference (Default format is *forename.surname*)
- Enter a password and confirm the password
 - This must be a minimum of 8 characters
- Click **Complete Registration**

The staff registration process is now complete; you can now access the portal using the username given and the password you created.

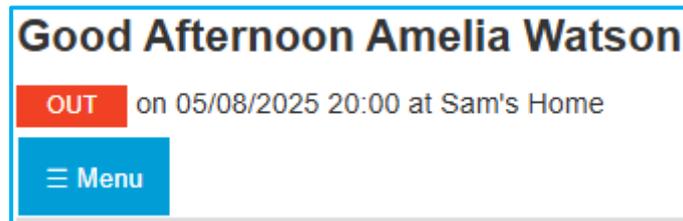
my calendar.

When you access the staff portal, the first page you will see is **My Calendar**. This will show you any shifts you've been assigned to on the rota, hours you've worked from clocking in and out, as well as any holidays, absences and training that have been added to your record. The calendar will open on the current month, but you can use the arrows at the top right of the page to navigate to future and previous months.

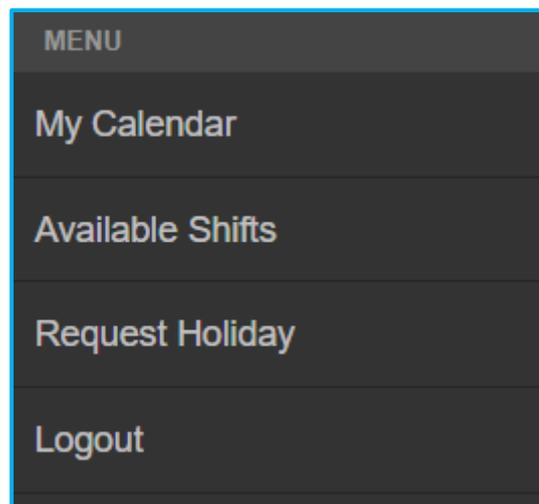
You can also see your current clock status at the top of the page, and when your last clock was.

navigating the staff portal.

Click **Menu** at the top left of the page to open the menu list on the left-hand side of the screen, further options are shown.



The menu allows you to navigate between the different sections of the staff portal: your calendar, checking available shifts, requesting holidays, as well as logging out to exit the staff portal.



available shifts.

Here available shifts are displayed based on the rota. By default, it will show any shifts you would be able to cover at the main home you work at; untick the box at the top of the page to show you all shifts across any additional homes you are pool staff at.

- Click **Request** next to any *Needed* shifts to identify any shifts you are available to cover and make yourself available to cover the additional hours
- Any shifts you have been sent a text message asking to cover will be highlighted as *Home Requested*:
 - Click **Can Cover** if you are available to cover the requested shift
 - Click **Unavailable** if you are unable to cover the requested shift

Please Note: You can click the **Can Cover/Unavailable** option to change your availability of the shift back and forth.

Tuesday, 12th August 2025 (Today)		
<input type="radio"/>	Needed: 19:00 - 07:00 Care Assistant Night (Care Nights) at Sam's Home	<input type="checkbox"/> Request
<input type="radio"/>	Needed: 19:00 - 07:00 Care Assistant Night (Care Nights) at Sam's Home	<input type="checkbox"/> Can Cover
<input checked="" type="radio"/>	Home Requested: 19:00 - 07:00 Senior Carer Night (Care Nights) at Sam's Home	<input type="checkbox"/> Unavailable

If you are assigned to any additional shifts you have requested, they will disappear from this section and appear on your calendar as a shift assigned.

requesting a holiday.

From the menu, select **Request Holiday** to create a request for leave.

Please Note: This is only a request and will require authorisation from an admin user before being taken.

The page will tell you how much holiday entitlement you have remaining based on your total years' entitlement; minus any holiday you've already taken. To request a holiday:

- Input the dates that you require for leave, enter the start and end date in the display
- Click **Next**

Good Afternoon Amelia Watson

OUT on 05/08/2025 20:00 at Sam's Home

Menu **Book a holiday**

SELECT DATES / CONFIRM DATES / ADD NOTES / SEND REQUEST

i Info - Please select first and last day of the holiday. You can include non-working days.

Holiday entitlement remaining: 33 hours

Start Date Required

End Date Required

✕ Cancel **➔ Next**

- Check the dates for your holiday request, check the **Confirmed Dates** box
- Click **Next** to proceed or **Back** to change the dates

Good Afternoon Amelia Watson

OUT on 05/08/2025 20:00 at Sam's Home

Menu **Book a holiday**

SELECT DATES / CONFIRM DATES / ADD NOTES / SEND REQUEST

Date

Monday, 13th October 2025

Tuesday, 14th October 2025

Confirm Dates

✕ Cancel **⬅ Back** **➔ Next**

- Add any notes to the request, such as a message you wish to send explaining the request
- Click **Next** to proceed or **Back** to make changes to your request

Good Afternoon Amelia Watson

OUT on 05/08/2025 20:00 at Sam's Home

Book a holiday

SELECT DATES / CONFIRM DATES / **ADD NOTES** / SEND REQUEST

Please enter any other comments to support this request. These comments will be passed to the request authoriser.

Notes 12/2000

test request

✕ Cancel
← Back
→ Next

- Check the request details and click **Save** to send the request

Good Afternoon Amelia Watson

OUT on 05/08/2025 20:00 at Sam's Home

Book a holiday

SELECT DATES / CONFIRM DATES / ADD NOTES / **SEND REQUEST**

Dates:
13/10/2025 14/10/2025

Notes: test request

✕ Cancel
← Back
💾 Save

- The request is now complete and sent to your admin; click **Close** to return to your calendar.

Good Afternoon Amelia Watson

OUT on 05/08/2025 20:00 at Sam's Home

Book a holiday

Holiday Request Saved

✕ Close

The holiday request will appear in your calendar on the portal – it will start off as requested until an admin responds to the request.

Monday, 13th October 2025
<ul style="list-style-type: none"> ● Shift: 07:00-19:00 Senior Carer (Care Days) at Sam's Home ● Holiday Requested
Tuesday, 14th October 2025
<ul style="list-style-type: none"> ● Shift: 07:00-19:00 Senior Carer (Care Days) at Sam's Home ● Holiday Requested

log out.

From the Menu, choose **Log Out** to exit the Staff Portal. You will no longer be able to view shifts, calendar items until you log in again.

forgot password.

If you forget your login details or think they may have been compromised in any way, contact your CoolCare administrator.

The CoolCare administrator will provide a new registration code, this information can be used to re-register your account on the Staff Portal. Please see our *Staff Portal Registration* section above for more information.