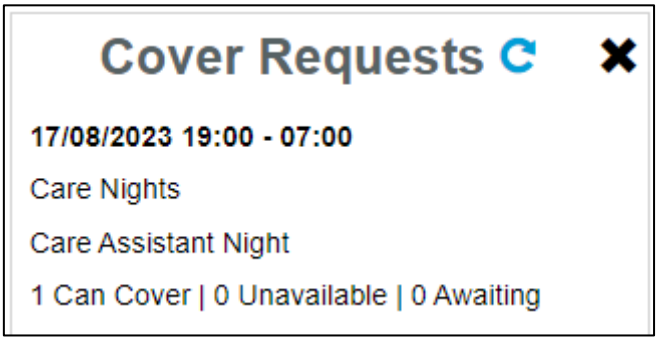
# Coolcare staff portal top tips

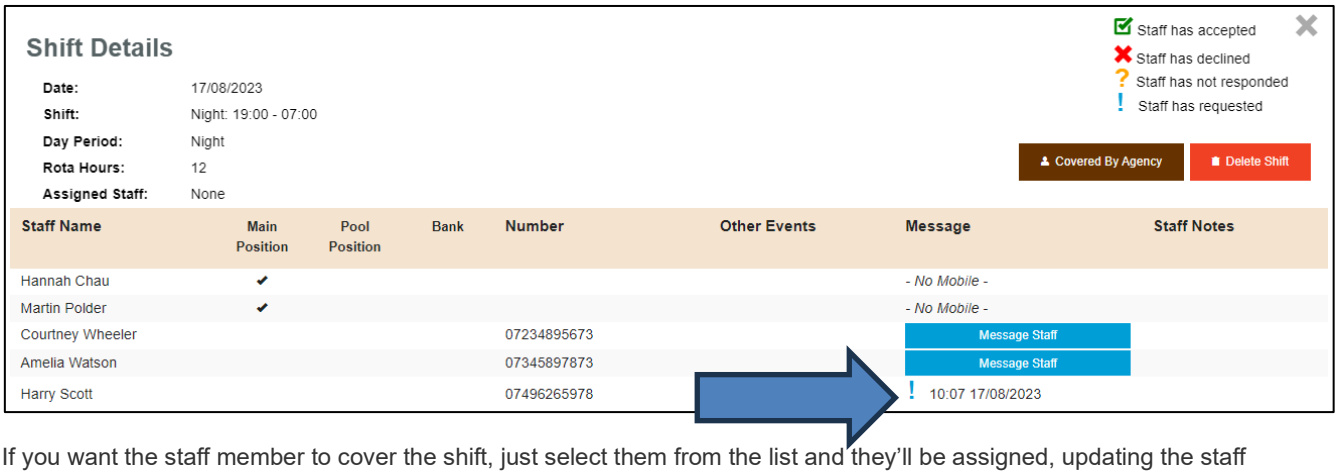
Coolcare's staff portal is a great way for your staff to keep up to date with their rotas and interact with different parts of the system. This guide includes tips to help keep track of staff interacting through the staff portal as well as a few steps to take if a staff member is having trouble accessing the portal.

## tracking shift requests

If staff are using the *Available Shifts* on the portal to request shifts on the rota, it can be easy to miss when shifts have been requested if you're checking the rota at a glance. The best way to keep an eye out for shift requests is using the *Cover Requests* button at the top right corner of the rota. This is normally used to monitor shift requests that are sent via text, but also tracks any requests from the portal. The shift will appear on the list and be marked as *1 Can Cover*, meaning one person has requested this shift from the portal.




Once you know which shift has been requested, you can find it on the rota and select the staff member you want to cover it. Staff that have requested the shift from the portal will appear with an exclamation mark where the *Message Staff* button would normally be.




If you want the staff member to cover the shift, just select them from the list and they'll be assigned, updating the staff member's individual calendar on the staff portal.



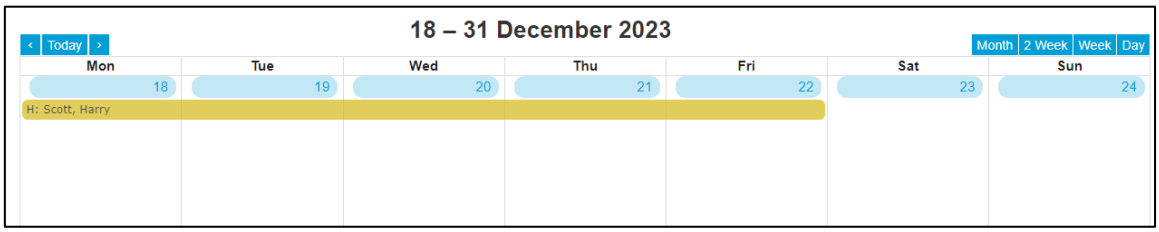
coolcare
admin made easy
T +44 (0) 113 385 3853
W coolcare.co.uk
E info@coolcare.co.uk

# tracking holiday requests

If staff are using the *Request Holiday* section of the portal to request annual leave, you may not see them if you don't actively monitor future months of the calendar. To help with this, Coolcare has the *Calendar Actions Required* widget on the dashboard to notify you of any new holiday requests that need to be responded to.

**Please note:** if you don't see the widget on your dashboard, you may need to speak with an admin user to enable it for you. See our *Users & Permissions* guide for more information on enabling dashboard widgets for users.

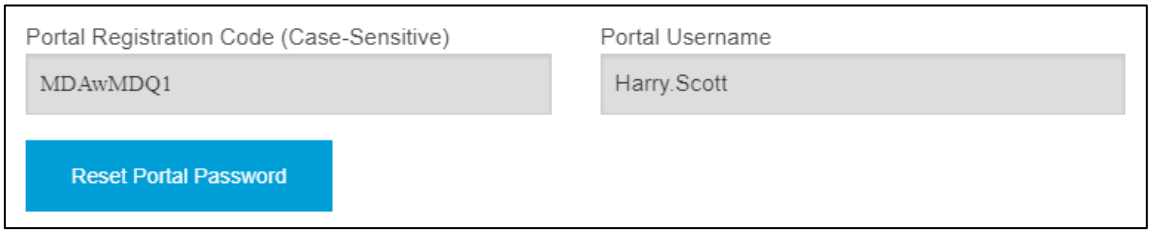
If you click on a request from the widget, it will take you to Coolcare's calendar and highlight the request you selected on the widget. From there you can authorise or decline the holiday request which will then feedback to the staff member's individual calendar on the portal.




# staff cannot access the staff portal?

If a staff member is having trouble accessing the portal, there are a few steps you can take to make sure they can register and log in:

- **Ensure they're using the right link** – the URL you use to access the staff portal will be unique to your company, if you are unsure of the correct link to use then contact our support team to check.
- **Confirm their registration code** – if the staff member is struggling to register, check the registration code on their staff record. This can be found in *H.R. – Employment Details* on the staff record.
- **Reset their staff portal login** – if the staff member can't login, resetting their portal login would be the best course of action. Go to *H.R. – Employment Details* on their staff record and click the *Reset Portal Password* button. This will reset their login and will need to register again, using the portal registration code.




**Please note: our customer support team do not have access to reset portal passwords, only contact them if the staff member cannot access the portal after trying the steps above.**



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W coolcare.co.uk
E info@coolcare.co.uk