# staff portal quick start guide.

This quick guide will take you through the process of getting a staff member registered on the staff portal. It will include the information they need to register and where it can be found on CoolCare, as well as how to reset a staff portal login if they cannot access the portal.

staff portal url.

The first thing you'll need is the URL to access the staff portal. This is unique to your company, and can be found within CoolCare:

- Select your name in the top right corner of CoolCare to open the system menu
- Select **Generate Portal Poster**
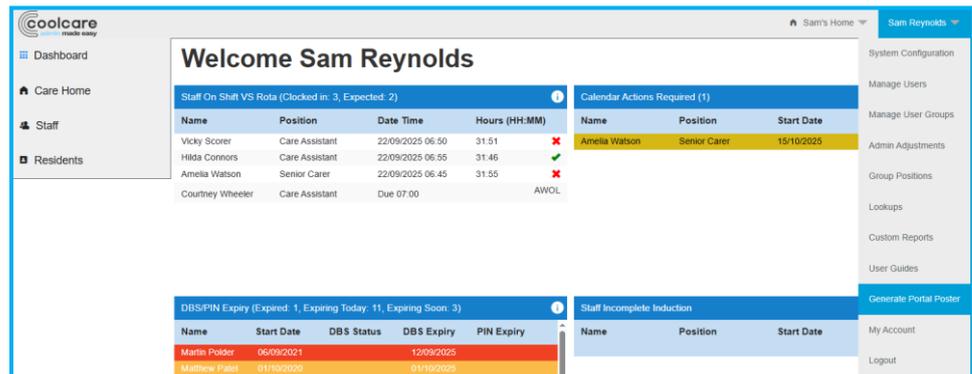
This will create a PDF you can save and share with your staff. It includes the URL to access the portal, as well as a QR code they can scan to easily access it on their mobile device. Once staff members have accessed the portal, it is recommended they favourite/bookmark the page for easy access in the future.

portal registration code.

The second thing staff members will need is their portal registration code, unique to each staff member. You can find this on the staff record:

- Go to **Staff – Staff Records**
- Select the staff member you wish to view
- Go to **H.R. – Employment Details**
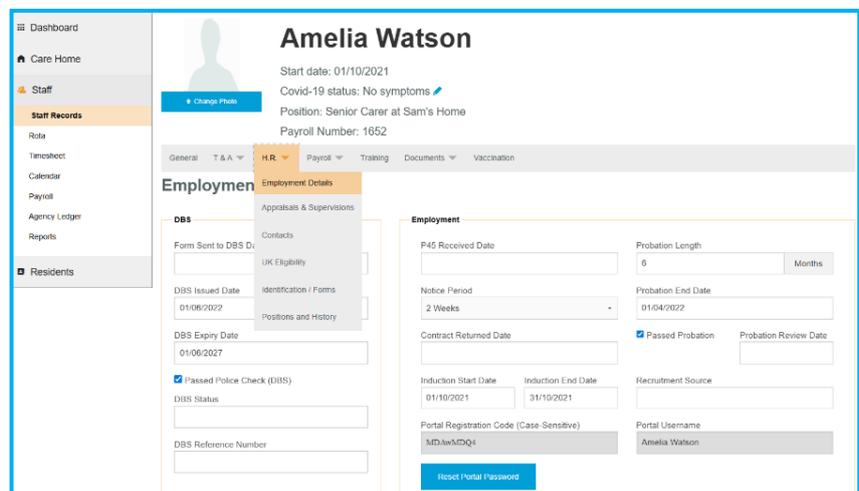
This page includes the Portal Registration Code under the **Employment** section of the page. That code is required for the staff member to register via the staff portal URL. Next to it you can find their **Portal Username**, which will say **Staff not registered** if they haven't used the portal before. Once they have registered it will show their username. Under this you can find the **Reset Portal Password** button, to reset a staff portal login if they forget their password. Once reset, the staff member would use the registration code again to re-register for the portal and create a new password.

Please Note: The registration codes can also been found on the **Full Staff Details** report in **Staff – Reports**.

registering for the staff portal.

With the details found above, the staff member can now access and register for the portal. This can be done on any device that can access the internet:

- Go to the URL found on the staff portal poster
- Select **Register Here** under the login boxes
- Enter the registration code from the staff record
- Make a note of the username given
- Set a password
- Select **Complete Registration**

The portal login will now be setup, and the staff member can log in with the username given and password they created.