

Staff portal – staff user guide

Staff Portal 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.

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

The staff portal URL and Unique Registration Code is supplied by the Home Administrator.

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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](#)

- Click on the 'Register Here' button
- Enter your unique registration code supplied by your Care Home Administrator
- Click Next

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Portal Registration

Please enter your 8 character registration code (case-sensitive).
Contact your line manager to obtain this.

➔ Next

- Note the 'Username' for future reference. Default format is firstname.surname
- Enter a new password and confirm the password, this must be a minimum of 8 characters
- Click 'Complete Registration'

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Portal Registration

Please enter your password that will be used to login.

Username
Bela.Doyle

Enter Password
.....

Confirm Password
Confirm Password

Complete Registration

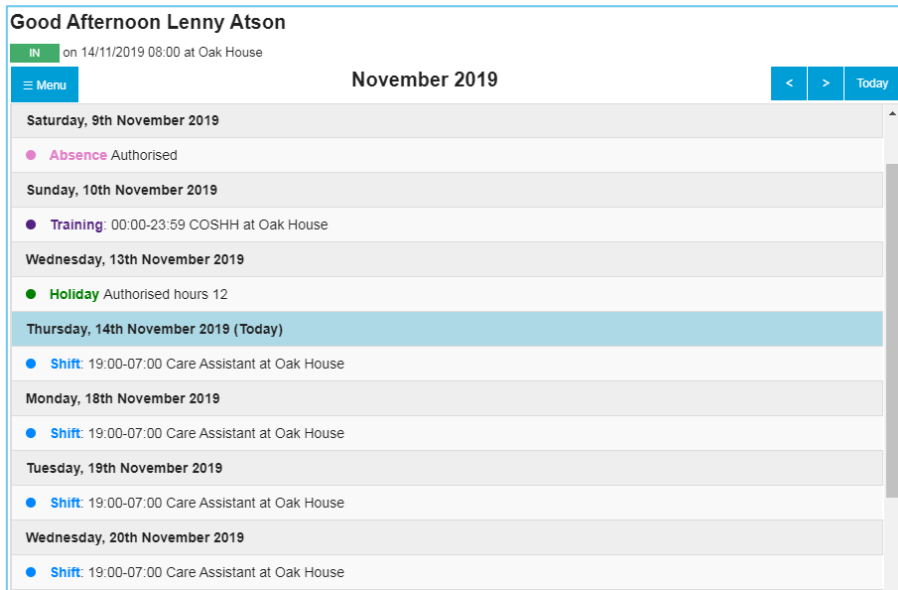
The staff registration process is now complete

- Open Chrome or Safari
- Enter the website (URL) provided for the staff portal
- Now enter your username (firstname.surname)
- Enter the password created as part of the registration process

You are now logged in to the live Staff Portal for your Home.

Staff Portal Layout

The Home screen shows the default calendar view for your Home. Here you can view your shifts, training, absence and holiday events. This is updated in 'real time' meaning any changes applied to your shifts, holidays are applied immediately.



Home Screen View Colour Coding

- Pink – Denotes authorised absence
- Purple – Denotes training
- Green – Denotes Holiday Authorised
- Yellow – Denotes Holiday request Pending
- Red – Denotes Holiday Declined
- Blue – Denotes shifts you are scheduled to work

Home Screen View – Other information

From the Home Screen view, check your clocking in status and time. If you work across Homes, check the Home that you last clocked in/out of.



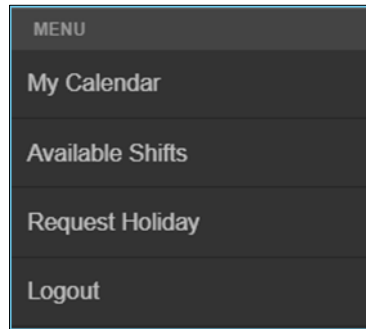
Use the Arrows to navigate between dates, for example if you wish to check Holidays or Shifts in the future.

- To quickly return to today's date, click the 'Today' button



Menu

Click 'Menu' to open the sub menu list on the left-hand side of the screen, further options are shown.



My Calendar

Click here to return to the Main Calendar view

Available Shifts

Here available shifts are displayed based on the Rota.

- Click 'Request' if you identify shifts you are available to cover and make yourself available to cover the additional hours.
- Click 'Can Cover' if you are available to cover a shift
- Click 'Unavailable' if you're unable to cover the shift(s) requested

Note the Can Cover/Unavailable options change as you click on the appropriate button

Good Morning Lenny Atson
IN on 14/11/2019 08:00 at Oak House

Available Shifts

These are shifts which are not currently allocated to any staff member.
To respond to a request from the home click "Can Cover" or "Unavailable", to request to cover an available shift, click "Request".

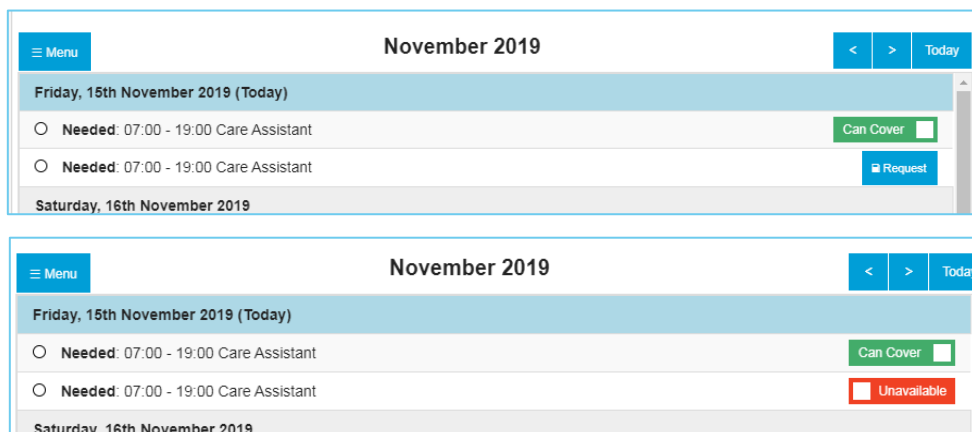
≡ Menu **November 2019** < > Today

Friday, 15th November 2019 (Today)

| | |
|--|---------|
| <input type="radio"/> Needed: 07:00 - 19:00 Care Assistant | Request |
| <input type="radio"/> Needed: 07:00 - 19:00 Care Assistant | Request |

Saturday, 16th November 2019

| | |
|--|---------|
| <input type="radio"/> Needed: 07:00 - 19:00 Care Assistant | Request |
| <input type="radio"/> Needed: 07:00 - 19:00 Care Assistant | Request |
| <input type="radio"/> Needed: 19:00 - 07:00 Care Assistant | Request |



Note other staff members may also 'Request' to cover a shift.

Additional Shifts

If you are successful in achieving additional shift(s), your main Home Screen view will now be updated to include the additional shift(s) in the display.

Request a Holiday

From Menu, select 'Request Holiday' to create a request for leave.

Note this is not approved leave and you must receive authorisation before taking leave.

- Input the date(s) that you require for Leave, enter the start and end date in the display.
- Your current Holiday entitlement is shown in the header.
- Click 'Next'

Good Morning Lenny Atson

IN on 14/11/2019 08:00 at Oak House

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: 100 hours

Start Date Required End Date Required

✕ Cancel
→ Next

If you wish to cancel the request at this point, click 'Cancel'. Your request for Holiday will not be processed.

- Check the dates for your holiday request, check the 'Confirmed Dates' flag.
- Click 'Next' to proceed or 'Back' to change the dates

Good Morning Lenny Atson

IN on 14/11/2019 08:00 at Oak House

Menu **Book a holiday**

SELECT DATES / CONFIRM DATES / ADD NOTES / SEND REQUEST

Date

Monday, 18th November 2019

Tuesday, 19th November 2019

Confirm Dates

Cancel **← Back** **→ Next**

- Add Notes to support your request for Holiday.
- Click 'Next' to proceed or 'Back' to make changes to your request

Good Morning Lenny Atson

IN on 14/11/2019 08:00 at Oak House

Menu **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 52/2000

Short break with my wife for our wedding anniversary

Cancel **← Back** **→ Next**

- Check the request details and click 'Save' to send the request
- Click 'Close' to complete



The holiday request will now be shown in the Calendar Home Screen view.

Good Afternoon Lenny Atson

IN on 14/11/2019 08:00 at Oak House

Menu **November 2019** < > Today

Friday, 15th November 2019 (Today)

- Shift: 07:00-19:00 Care Assistant at Oak House

Monday, 18th November 2019

- Shift: 19:00-07:00 Care Assistant at Oak House
- Holiday Requested

Tuesday, 19th November 2019

- Shift: 19:00-07:00 Care Assistant at Oak House
- Holiday Requested

Wednesday, 20th November 2019

- Holiday Authorised will appear in your Home Screen in **Green** with the requested number of hours shown
- Holiday Declined will be appear in your Home Screen in **Red**

Log Out

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

Forgot Password

If your log on details are lost or if you think they may have been compromised in any way, contact your CoolCare Administrator.

The CoolCare Administrator will provide a new unique key, this information can be used to re-register your account on the Staff Portal. Refer to the 'Staff Portal Registration' section of this document.