

Care Home Interaction with Staff Portal and Messaging

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Providing Staff Registration Details

The care home must provide each employee with their Portal Registration Code and the Portal URL (Web address) to access the portal. The portal URL will be provided to the home by CoolCare support. Full employee instructions are given in the employee portal guide and video.

To find a staff portal registration code: Staff/ Staff Records/ Open Record/ HR/ Employment Details

Position: Care Assistant at Oak House
Payroll Number: 1150

General T & A H.R. Payroll Training Documents

Employment Details

Appraisals & Supervisions
Contacts
UK Eligibility
Identification / Forms
Positions and Hours

DBS

Form Sent to DBS Date
DBS Issued Date
DBS Expiry Date
 Passed Police Check (DBS)
DBS Status
DBS Reference Number

Employment

P45 Received Date
Probation Length: 6 Months
Notice Period: 4 Weeks
Probation End Date: 05/01/2011
Contract Returned Date
 Passed Probation
Probation Review Date
Inductions Start Date
Portal Registration Code (Case-Sensitive): **MDAwMDEz**
Reset Portal Password

Resetting a Portal Password

If an employee forgets their password, the care home must reset the portal password: Staff/ Staff Records/ Open Record/ HR/ Employment Details/ Reset Portal Password

Position: Care Assistant at Oak House
Payroll Number: 1150

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Reset Portal Password

Portal Functionality

Through the portal staff can request a holiday and request individual available shifts (if the home use the rota). In addition, the care home can message staff through the rota to ask if staff would like to cover a particular available shift. They can then choose a member of staff from any replies received

Authorising a Holiday

If a staff member requests a holiday through the portal, it will show on the dashboard as needing authorisation. Scroll to Calendar Actions Required widget and click on the entry to open the calendar.

Calendar Actions Required (1) i			
Name	Position	Start Date	End Date
Doug McClure	Care Assistant	21/11/2019	25/11/2019

The calendar will open and the selected staff member will flash on the screen. Click on the flashing staff member entry.

MON	TUE	WED	THU	FRI	SAT	SUN
18	19	20	21	22	23	24
: Spain, Sam		H: Beswick, Gertrude			H: Aiden-Smith, Lucy	
: Atson, Lenny		H: McClure, Doug		H: Johnson, Margaret		
: Owen, William						

This will open up the holiday entry which you would action as normal. If the home uses the rota any shifts will show the rota hours. These may need adjusting for breaks if applicable. If the home does not use the rota then you must manually add the hours for each shift. You can then authorise or decline the request. The employee will be able to see on their portal if the holiday has been authorised or declined.

Edit Holiday Request

Allocated Staff Required

Doug McClure

When Required

21/11/2019 to 25/11/2019

Accrued Entitlement	Total Entitlement
126.3 hours → 102.3 hours <small>(Current Year)</small>	143.7 hours → 119.7 hours <small>(Current Year)</small>
Contracted Hours	
36 hours	

Date	Status <small>Required</small>			Hours <small>Required</small>
	Authorised	Declined	Requested	
21/11/2019	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	12
22/11/2019	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0
23/11/2019	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0
24/11/2019	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0
25/11/2019	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	12

1. Add, check or adjust hours

2. Authorise or Decline and Save

Messaging Available Staff Through the Rota

You can open an available shift on the staff rota and message any available staff direct to their mobile via an SMS text message. They can then reply that they can cover or not available. You can then check the replies and allocate a shift to one of the available employees. Once allocated the successful employee will receive a message to their mobile phone to say they have been allocated the shift. They will also be able to see the updated shift in their portal calendar.

1. Select Available shift to open options

Position	Staff	Rota Hours	Tue 19 Nov	Wed 20 Nov	Thu 21 Nov	Fri 22 Nov	Sat 23 Nov
Senior Care Worker	Mohammad Javid	192.00	M.Javi 19:00-07:00	M.Javi 19:00-07:00			
Care Assistant	Matty Grant	204.00	M.Gran 19:00-07:00	M.Gran 19:00-07:00	M.Gran 19:00-07:00		
Care Assistant	Barry Wood	168.00				B.Wood 19:00-07:00	B.Wood 19:00-07:00
Care Assistant	Marilyn Howe	204.00					
Care	+ Extra Shift	Afternoon Day	S-2/2 H-24/24.00 S-4/4 H-48/48.00	S-2/2 H-24/24.00 S-4/4 H-48/48.00			
Senior Care Worker	Lindsey Smith	192.00	L.Smit 07:00-19:00	L.Smit 07:00-19:00			
Senior Care Worker	Andrea Arlie-Davies	180.00			A.Ari 07:00-19:00	A.Ari 07:00-19:00	A.Ari 07:00-19:00
Senior Care Worker	Thomas Stevenson	192.00	T.Stev 07:00-19:00	T.Stev 07:00-19:00			
Senior Care Worker	Vicky Lemon	180.00			V.Lemo 07:00-19:00	V.Lemo 07:00-19:00	V.Lemo 07:00-19:00
Care Assistant		204.00	Agency 07:00-19:00	S.Law 07:00-19:00	07:00 - 19:00		
Care Assistant		168.00				07:00 - 19:00	07:00 - 19:00

2. Select Edit Pencil Icon

Shift Details

Date: 22/11/2019

Shift: Afternoon : 07:00 - 19:00

Day Period: Afternoon

Rota Hours: 12

Assigned Staff: None

Select edit (pencil icon)

3. Select "Message Staff" Button

Shift Details

Date: 22/11/2019

Shift: Afternoon : 07:00 - 19:00

Day Period: Afternoon

Rota Hours: 12

Covered by Agency
Covered Elsewhere
Message Staff

Forename	Surname	Main Position	Pool Position	Bank	Telephone	Staff Other Events
Andrew	Stewart	✓		✓	07890 156 ...	
Jenny	Lane	✓		✓	07899 223 ...	
Helen	Chermside	✓		✓	07711210458	

Select "Message Staff" button

- Choose staff to message with invite to cover - click in box next to employee name. All employees available for the shift will appear here. If there is no tick box next to their name, it is because there is no mobile entered onto their record. The staff will all receive a message to the mobile and can respond with can cover or unavailable.

Send Shift Cover Request SMS To Selected Staff

✔ Staff has accepted ✕
✘ Staff has declined
?? Staff has not responded
! Staff has requested

	Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Notes
<input type="checkbox"/>	Andrew Stewart	✔		✔	07890 156 776		
<input type="checkbox"/>	Jenny Lane	✔		✔	07899 223 565		
<input checked="" type="checkbox"/>	Helen Chermiside	✔		✔	07711210458		
<input checked="" type="checkbox"/>	Gloria Jones	✔		✔	07899082561		
<input type="checkbox"/>	Carol Smith	✔		✔	07880230560		
<input type="checkbox"/>	David Smith	✔		✔	01670 825923		
	Sian Sheppherd	✔		✔	- No Number -		
<input type="checkbox"/>	Joanne Davies	✔			07586 113 456		
	William Owen	✔			- No Number -		

- Checking Replies – To check the replies open the shift/ select edit and message staff as shown previously. There are 4 possible icons that will show next to the employee name:

✔ Staff has accepted	Staff have accepted to cover shift
✘ Staff has declined	Staff have indicated they are unavailable
?? Staff has not responded	Staff are yet to respond
! Staff has requested	Staff have requested the shift direct from the portal

- Choose staff member to fill shift – open shift/ select edit/ select message. Scroll down to see who has replied. Allocate shift to one of the staff marked either in Green – Staff has accepted or Blue – Staff has requested.

Check replies and choose a staff member

Close message screen and remember staff name

Send Shift Cover Request SMS To Selected Staff

✔ Staff has accepted ✕
✘ Staff has declined
?? Staff has not responded
! Staff has requested

	Staff Name	Main Position	Pool Position	Bank	Number	Other Events	Notes
<input type="checkbox"/>	Andrew Stewart	✔		✔	07890 156 776		
✔ (14:13 19/11/2019)	Jenny Lane	✔		✔	07870856712		
??	Helen Chermiside	✔		✔	07792763975		
??	Gloria Jones	✔		✔	07899082561		
<input type="checkbox"/>	Carol Smith	✔		✔	07880230560		
<input type="checkbox"/>	David Smith	✔		✔	01670 825923		
	Sian Sheppherd	✔		✔	- No Number -		
<input type="checkbox"/>	Joanne Davies	✔			07586 113 456		
	William Owen	✔			- No Number -		
! (10:02 12/11/2019)	Stewart Law	✔			07793763975		

Allocate Shift– Select chosen employee and assign to shift as you normally would. The employee will receive a SMS text message to say they have been allocated the shift and it will also show in their staff portal calendar when they log in.

General Messaging

Sending a Message

As well as messaging within the rota you can also message staff through Care Home/ Staff Messaging. To send a new message select **“New SMS”** button

Name	Position	Message	When
Mr Stewart Law	Care Assistant	Thanks Jenny that isn't a problem	15/11/2019 14:31
Mr Lenny Atson	Care Assistant	Thanks Jenny that isn't a problem	15/11/2019 14:31
Mrs Carol Smith	Care Assistant	test	15/11/2019 09:11
Mrs Gloria Jones	Care Assistant	Yes I can start at 7 tomorrow and Saturday	13/11/2019 10:43
Mr William Owen	Care Assistant	Yes I can start at 7 tomorrow and Saturday	13/11/2019 10:43
Mr Eric Morecambe	Care Assistant	this is a test	08/11/2019 09:56

Type message and then click “Add Staff” button to select staff to receive the message

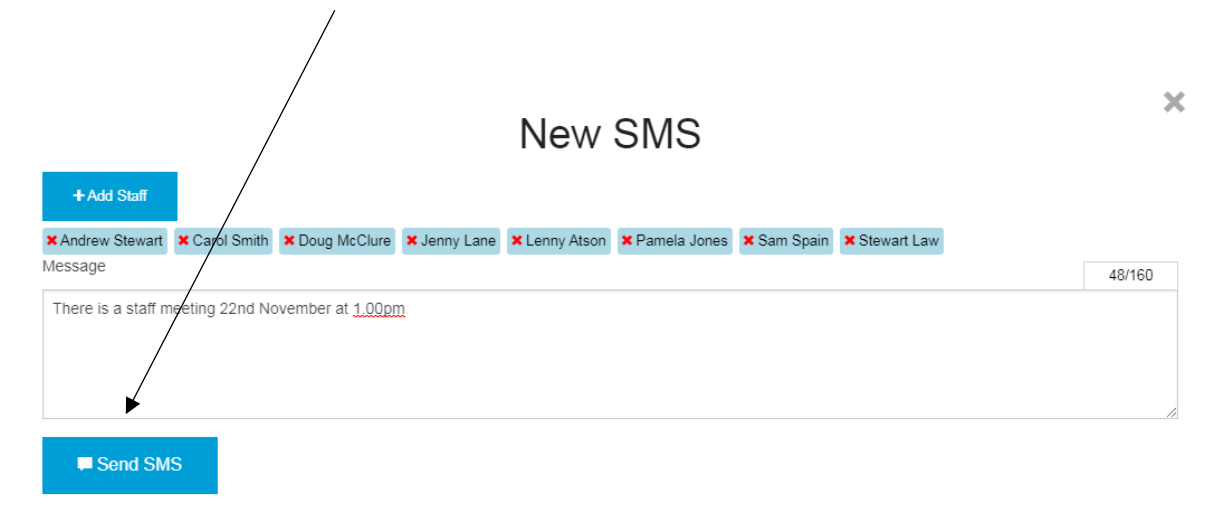
Filter Staff – You can apply a filter if you wish to make it easier to select staff. Filters are available by position or by permanent / bank. Simply select the filter and click on the filter option you require.

Select Staff – Select each staff member in turn and these will move to right hand side. Select “Add Staff” button when you have completed your choices

Staff Name	Department	Position	Bank
+ Eric Morecambe	Care	Care Assistant	
+ Gloria Jones	Care	Care Assistant	✓
+ Joanne Davies	Care	Care Assistant	
+ Sam Smith	Care	Care Assistant	

Staff Name	Position
- Andrew Stewart	Care Assistant
- Carol Smith	Care Assistant
- Doug McClure	Care Assistant
- Jenny Lane	Care Assistant
- Lenny Atson	Care Assistant
- Pamela Jones	Care Assistant
- Sam Spain	Care Assistant
- Stewart Law	Care Assistant

Send Message – Select the “Send SMS” button to send the message



Reading Replies

Each message displays individually per employee. If there is an unread reply the text will display in **BOLD**. Select a conversation to open it.

