

Employee Portal & Messaging Guide

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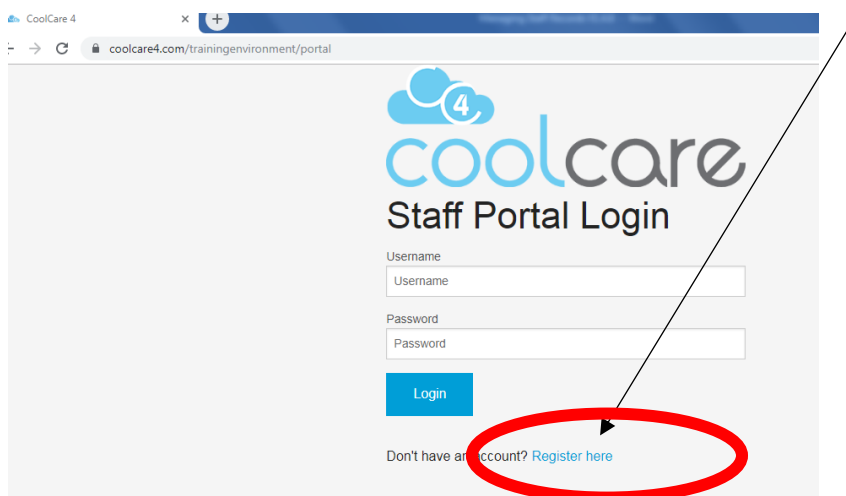
Staff Portal Overview

The staff portal allows you (the employee) to view your calendar events e.g. training, holidays, holiday requests, absences, as well as your rostered shifts. You can also view and request available shifts as well as request holidays.

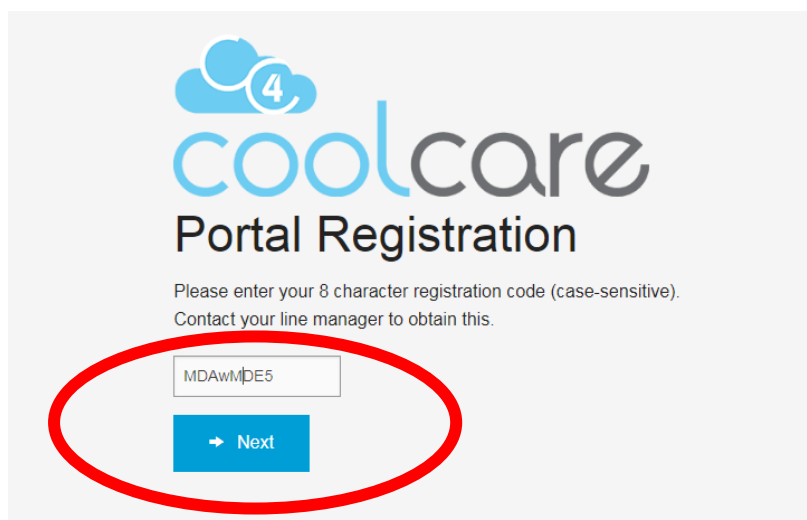
Registering a Portal Account

The care home will issue you with a URL (web address) to type into a browser address bar and a unique employee portal registration number.

Type the URL into a browser and select enter. Then click the “Register here” link

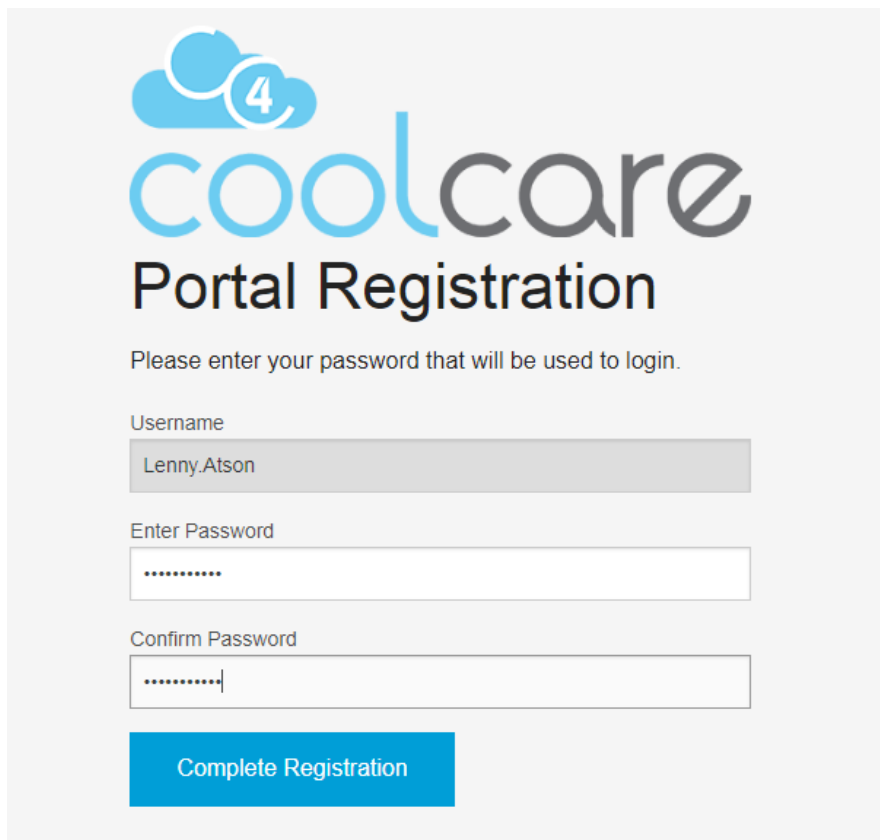


Enter your unique portal registration code into the text box shown and select “Next” button.



1. Take a note of your username for future reference. This will be in the format firstname.surname.
2. Enter and confirm a password
3. Select "Complete Registration" button.

The account is now registered and the you can log onto the portal using the URL, Username and Password you have just created.



The screenshot shows the 'coolcare Portal Registration' page. At the top is the logo, which consists of a blue cloud with a white circle containing the number '4' inside it, followed by the text 'coolcare' in a blue sans-serif font. Below the logo, the title 'Portal Registration' is displayed in a larger, bold, black sans-serif font. Underneath the title, there is a line of text: 'Please enter your password that will be used to login.' The form contains three input fields: 'Username' with the text 'Lenny.Atson' entered, 'Enter Password' with a series of dots, and 'Confirm Password' also with a series of dots. At the bottom of the form is a blue button with the text 'Complete Registration' in white.

Forgotten Password

If you forget your password, inform your line manager and they will reset your account. You will then need to use your unique employee registration code to re-register your account and password using the steps above.

Logging in

Use the URL issued by your home and enter your username and password from the registration process and select the “Login” button.

coolcare4.com/SalesDemoEnvironment/portal

Registration has been completed successfully

coolcare Staff Portal Login

Username
Lenny Atson

Password
.....

Login

Don't have an account? [Register here](#)

Portal Layout

The home screen shows the default calendar view for your portal account. Here you can view your shifts, training, absence and holiday events. Each are colour coded differently. This updates in real time.

Good Afternoon Lenny Atson

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

Menu November 2019 < > Today

Saturday, 9th November 2019

- Absence Authorised

Sunday, 10th November 2019

- Training: 00:00-23:59 COSHH at Oak House

Wednesday, 13th November 2019

- Holiday Authorised hours 12

Thursday, 14th November 2019 (Today)

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

Monday, 18th November 2019

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

Tuesday, 19th November 2019

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

Wednesday, 20th November 2019

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

You can check the date and time you last clocked

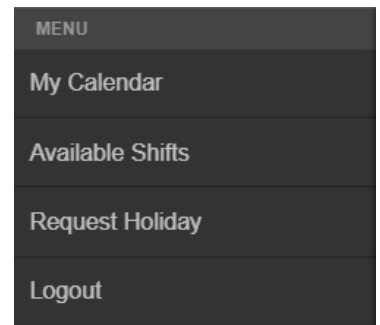
Use scroll buttons < > to view past and future events. The “Today” button returns to current events

The menu button opens up the sub- menu on the left

Menu Options

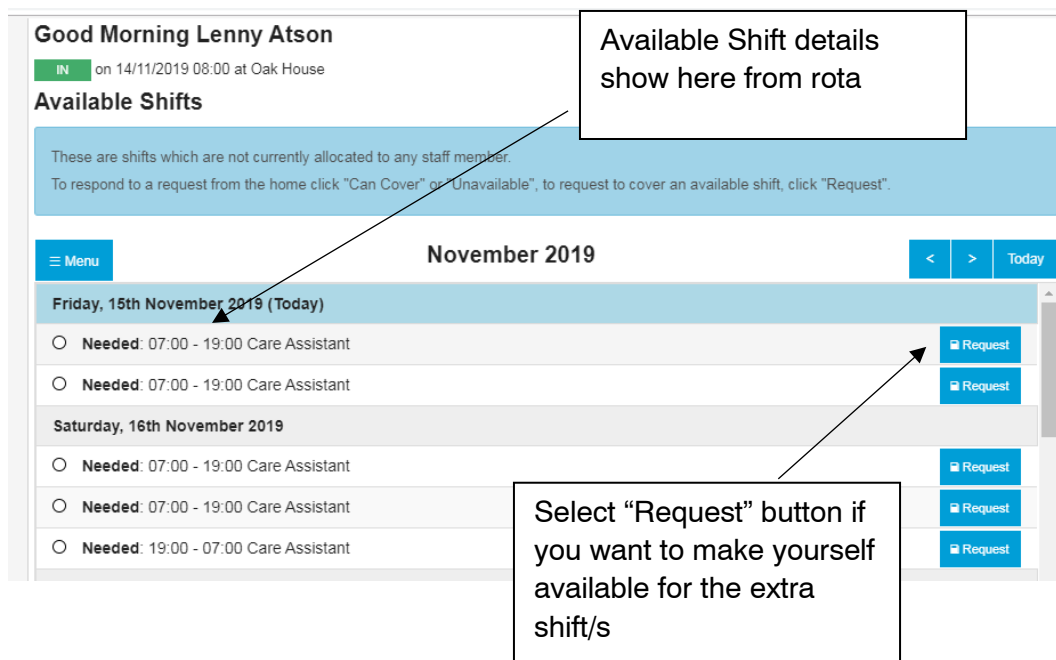
The “Menu” button when selected has 4 sub menu options:

- **My Calendar** – Returns to the default calendar view.
- **Available Shifts** – Shows available shifts on your rota. For each shift you can mark as “Can Cover” or “Unavailable”.
- **Request Holidays** – You can request a holiday for authorisation by your manager.
- **Logout** – Logs out of the portal.



Available Shifts

Select Menu Button /Available Shifts. From here you can view, request or mark yourself unavailable for extra shifts



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)

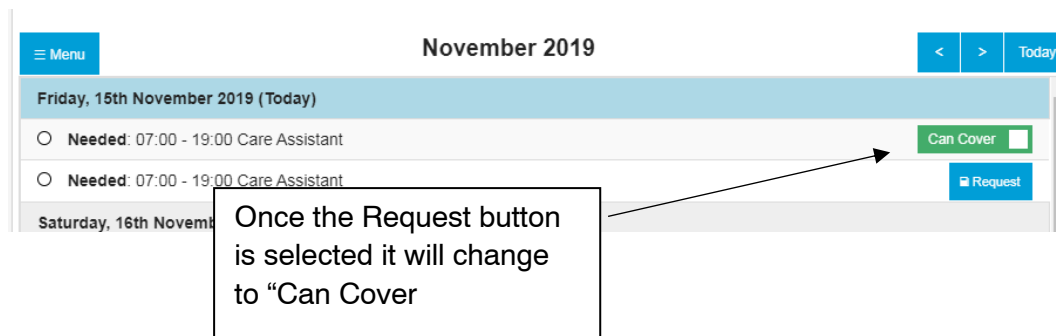
- Needed: 07:00 - 19:00 Care Assistant [Request]
- Needed: 07:00 - 19:00 Care Assistant [Request]

Saturday, 16th November 2019

- Needed: 07:00 - 19:00 Care Assistant [Request]
- Needed: 07:00 - 19:00 Care Assistant [Request]
- Needed: 19:00 - 07:00 Care Assistant [Request]

Available Shift details show here from rota

Select "Request" button if you want to make yourself available for the extra shift/s



Menu November 2019 < > Today

Friday, 15th November 2019 (Today)

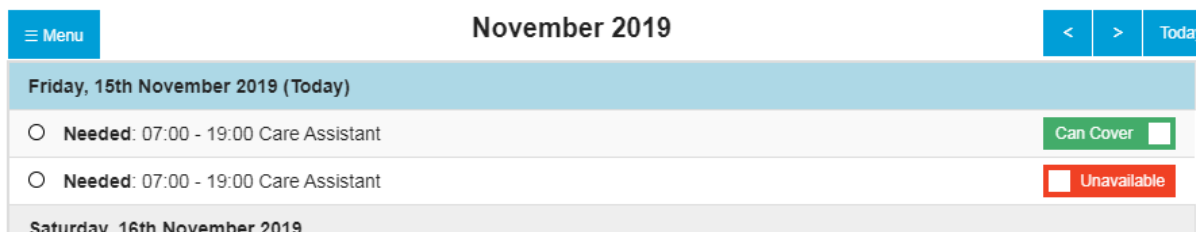
- Needed: 07:00 - 19:00 Care Assistant [Can Cover]
- Needed: 07:00 - 19:00 Care Assistant [Request]

Saturday, 16th November 2019

Once the Request button is selected it will change to "Can Cover"

Making Yourself Unavailable for a Shift

Select Request/ Select Can Cover. This will toggle the shift from “Can Cover” to “Unavailable”.

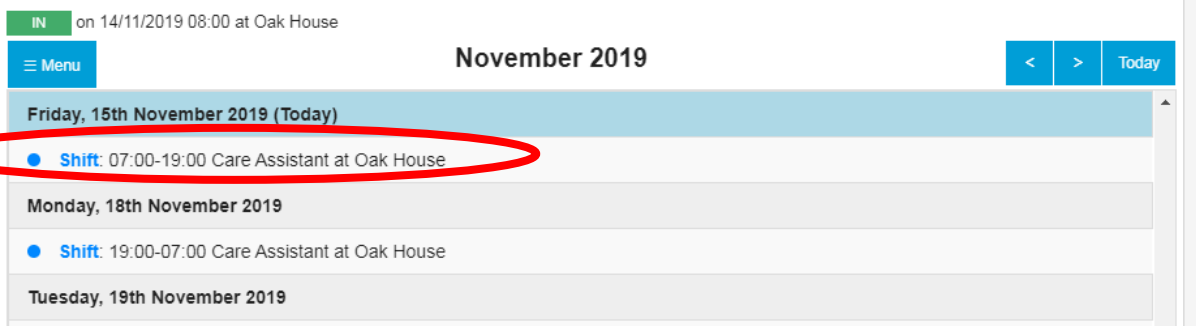


Notification of Additional Shift

You will be able to check in two ways if you have been successful in gaining the additional shift:

1. Your portal calendar will show the extra shift

Good Morning Lenny Atson



2. You will also receive an SMS text message direct to your mobile phone.



Requesting a Holiday

To request a holiday, select Menu/ Request Holiday

This will open form 1 of 4.

1. **Select Dates Form** - Enter start and end dates of holiday application and select the "Next" button

The screenshot shows the 'Select Dates Form' for 'Good Morning Lenny Atson'. At the top, it displays 'IN on 14/11/2019 08:00 at Oak House' and a 'Menu' button. The main heading is 'Book a holiday'. Below this is a navigation bar with 'SELECT DATES / CONFIRM DATES / ADD NOTES / SEND REQUEST'. An information box states: 'Info - Please select first and last day of the holiday. You can include non-working days.' Below that, it shows 'Holiday entitlement remaining: 100 hours'. There are two date input fields: 'Start Date Required' with the value '18/11/2019' and 'End Date Required' with the value '19/11/2019'. At the bottom, there are two buttons: a red 'Cancel' button and a blue 'Next' button. An arrow points from the 'Next' button in this form to the 'Next' button in the subsequent form.

2. **Confirm Dates Form** – Check dates and click in confirm dates check box and select "Next" button

The screenshot shows the 'Confirm Dates Form' for 'Good Morning Lenny Atson'. At the top, it displays 'IN on 14/11/2019 08:00 at Oak House' and a 'Menu' button. The main heading is 'Book a holiday'. Below this is a navigation bar with 'SELECT DATES / CONFIRM DATES / ADD NOTES / SEND REQUEST'. The 'Date' section lists 'Monday, 18th November 2019' and 'Tuesday, 19th November 2019'. Below the dates, there is a checked checkbox labeled 'Confirm Dates'. At the bottom, there are three buttons: a red 'Cancel' button, a blue 'Back' button, and a blue 'Next' button. An arrow points from the 'Next' button in this form to the 'Next' button in the subsequent form.

3. Add Notes Form – Add supporting notes to your holiday application

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

4. Send Request Form – Check details and select Save button to send the 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**

Dates:
18/11/2019 19/11/2019

Notes: Short break with my wife for our wedding anniversary

Cancel Back Save

Select the “Close” button when complete

Good Afternoon Lenny Atson

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

Menu **Book a holiday**

Holiday Request Saved

Close

Notification in Calendar

Once the request has been sent it will display in the calendar as a holiday request

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
● Shift: 19:00-07:00 Care Assistant at Oak House
Monday, 25th November 2019
● Shift: 19:00-07:00 Care Assistant at Oak House
Tuesday, 26th November 2019
● Shift: 19:00-07:00 Care Assistant at Oak House

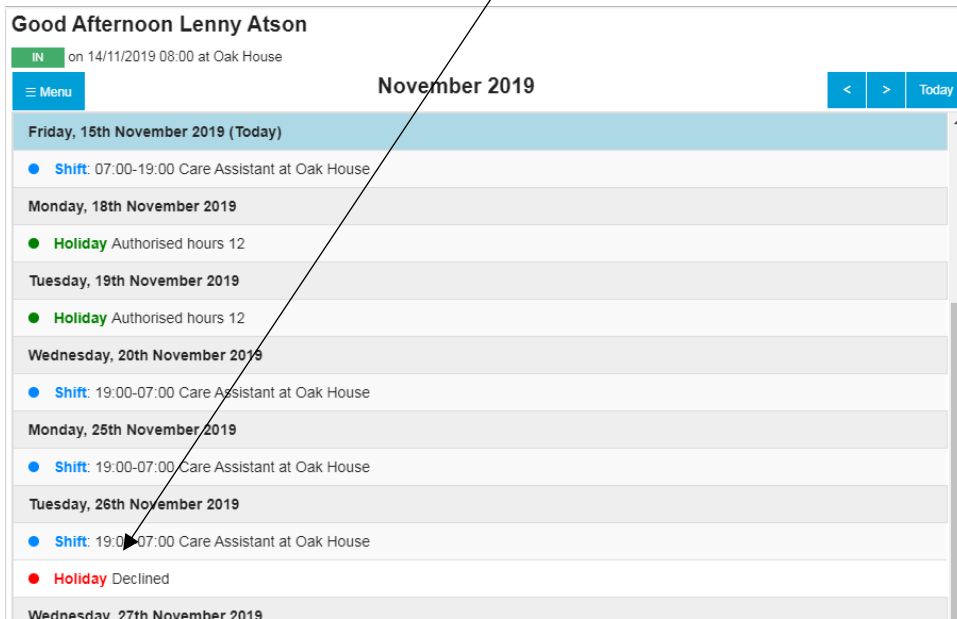
Portal Calendar If Holiday Authorised – If authorised by your line manager the holiday will display in your portal calendar Holiday and the number of authorised hours.

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

Menu **November 2019** < > Today

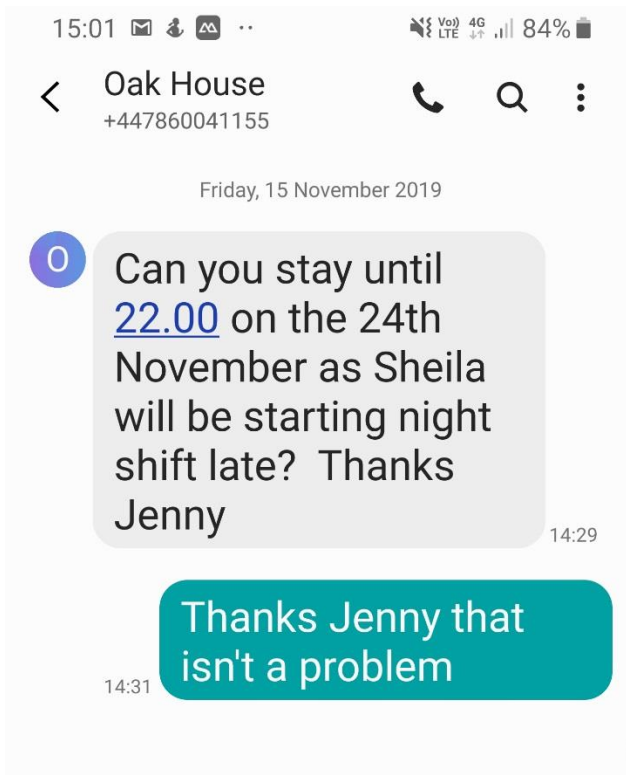
Friday, 15th November 2019 (Today)
● Shift: 07:00-19:00 Care Assistant at Oak House
Monday, 18th November 2019
● Holiday Authorised hours 12
Tuesday, 19th November 2019
● Holiday Authorised hours 12
Wednesday, 20th November 2019

Portal Calendar If Holiday Declined - Any holiday requests that are declined will also show in your portal calendar



Staff Messaging

The care home can send custom messages through the CoolCare system. These are not accessed on your portal but are received as SMS text messages direct to your mobile device. You can reply the same way as you would a normal text.



Here the care home has messaged an employee.

This was received as a SMS text message

The employee has replied the same way as they would for any text message