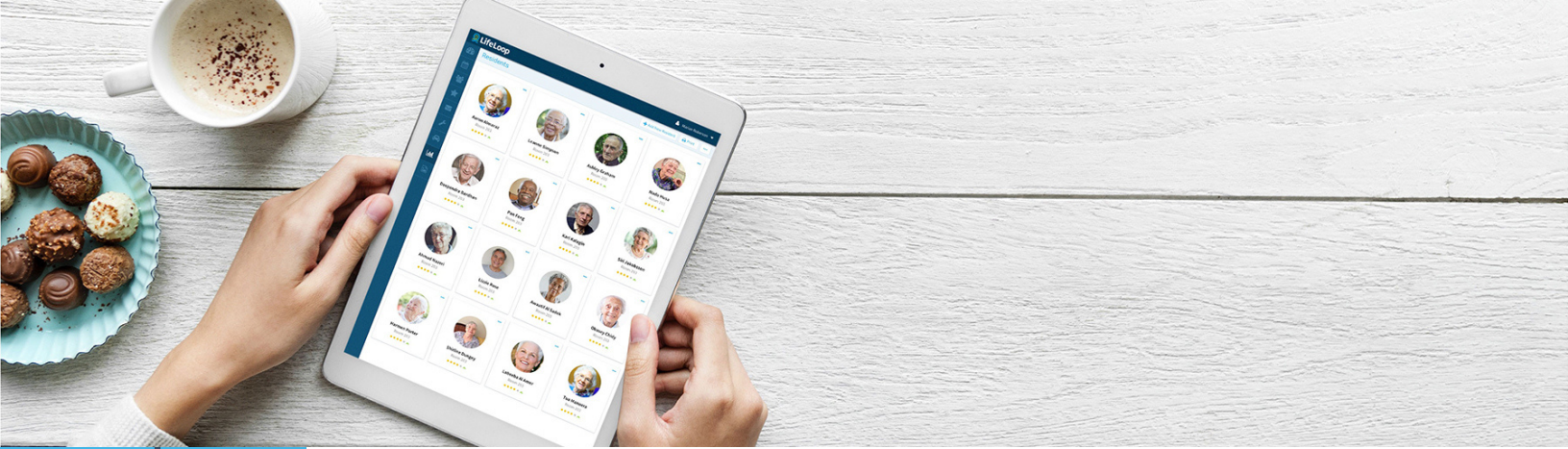


STAFF PERMISSIONS BY ROLE

Easily assign applicable permissions to individual staff members based on their position.



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STAFF PERMISSIONS BY ROLE

VIEW AND EDIT STAFF PERMISSIONS

STEP 1

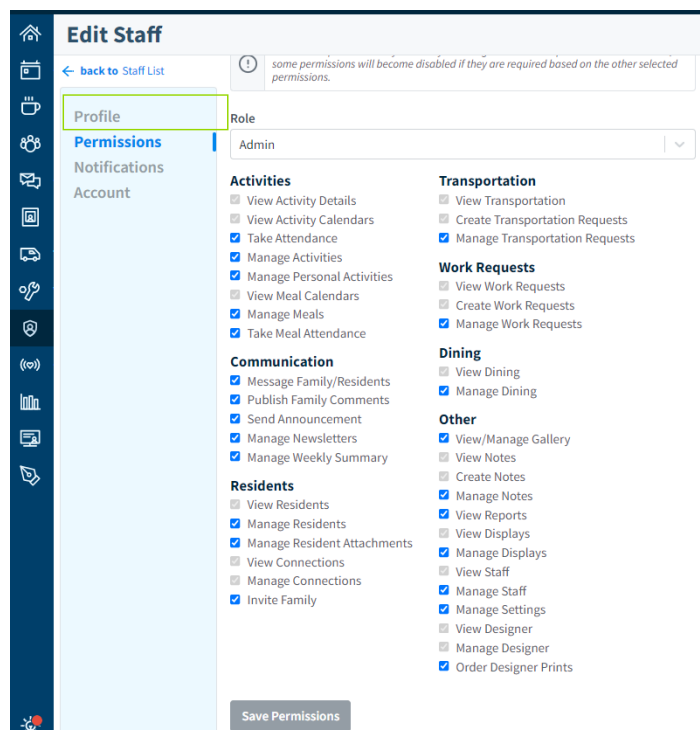
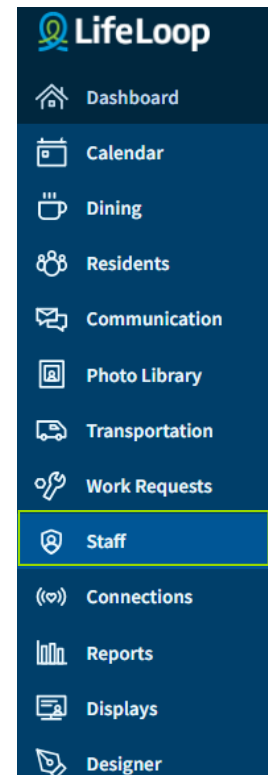
LOCATE THE STAFF TAB

If you do not see the **Staff** tab in the sidebar, you may not have permission to view or edit staff members. Contact your community administrator or main LifeLoop user.

STEP 2

VIEW & EDIT STAFF PERMISSIONS

To view or edit staff permissions, simply select that staff member from the **Staff List** and select the **Permissions** tab on the left-hand side. You can assign permissions by selecting a role or individually. Once selected make sure to save.



STAFF PERMISSIONS BY ROLE

DEFAULT PERMISSIONS

► DEFAULT PERMISSIONS

Outlined below are all default permissions for each role in LifeLoop. If you are in the process of onboarding and/or adding a new community, these will need to be assigned for the initial upload of staff into the system. Please input the **keyword** associated with the staff member's desired permissions in the Staff Implementation Spreadsheet provided.

Note: Further customization of these permissions can be made manually once the site has been setup, and you have logged in with the permission **Manage Staff**.

► KEYWORD = STAFF ROLE

Activity Assistant = Activity Assistant

Activity Director = Activity Director

Admin = Administrator

Dining = Dining

Director of Nursing = Director of Nursing

Front Desk = Front Desk

Marketing Director= Marketing Director

Med Tech = Med Tech

Transportation = Transportation

Work Request Tech = Maintenance, Housekeeping
and other crews

STAFF PERMISSIONS BY ROLE

PERMISSIONS DICTIONARY

➤ **VIEW**

The ability to only view the information, no ability to edit.

➤ **CREATE**

The ability to create without the ability to manage other's activities or requests, as well as status.

➤ **MANAGE**

The ability to create, edit, delete, approve, deny and update statuses.

➤ **PERMISSION HEIRARCHY**

A greyed out checkmark indicates a permission that is selected requires this base permission for it to function. For example: If you can take attendance, the view activities permission would be required and therefore greyed out.

STAFF PERMISSIONS BY ROLE

ROLES

ACTIVITY ASSISTANT

Role
Activity Assistant

Activities <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Activity Details <input checked="" type="checkbox"/> View Activity Calendars <input checked="" type="checkbox"/> Take Attendance <input type="checkbox"/> Manage Activities <input type="checkbox"/> Manage Personal Activities <input checked="" type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	Transportation <ul style="list-style-type: none"> <input type="checkbox"/> View Transportation <input type="checkbox"/> Create Transportation Requests <input type="checkbox"/> Manage Transportation Requests
Communication <ul style="list-style-type: none"> <input type="checkbox"/> Message Family/Residents <input type="checkbox"/> Publish Family Comments <input type="checkbox"/> Send Announcement <input type="checkbox"/> Manage Newsletters <input type="checkbox"/> Manage Weekly Summary 	Work Requests <ul style="list-style-type: none"> <input type="checkbox"/> View Work Requests <input type="checkbox"/> Create Work Requests <input type="checkbox"/> Manage Work Requests
Residents <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Residents <input type="checkbox"/> Manage Residents <input type="checkbox"/> Manage Resident Attachments <input type="checkbox"/> View Connections <input type="checkbox"/> Manage Connections <input type="checkbox"/> Invite Family 	Dining <ul style="list-style-type: none"> <input type="checkbox"/> View Dining <input type="checkbox"/> Manage Dining
	Other <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View/Manage Gallery <input type="checkbox"/> View Notes <input type="checkbox"/> Create Notes <input type="checkbox"/> Manage Notes <input checked="" type="checkbox"/> View Reports <input type="checkbox"/> View Displays <input type="checkbox"/> Manage Displays <input type="checkbox"/> View Staff <input type="checkbox"/> Manage Staff <input type="checkbox"/> Manage Settings <input type="checkbox"/> View Designer <input type="checkbox"/> Manage Designer <input type="checkbox"/> Order Designer Prints

ACTIVITY DIRECTOR

Role
Activity Director

Activities <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Activity Details <input checked="" type="checkbox"/> View Activity Calendars <input checked="" type="checkbox"/> Take Attendance <input checked="" type="checkbox"/> Manage Activities <input checked="" type="checkbox"/> Manage Personal Activities <input checked="" type="checkbox"/> View Meal Calendars <input checked="" type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	Transportation <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Transportation <input checked="" type="checkbox"/> Create Transportation Requests <input type="checkbox"/> Manage Transportation Requests
Communication <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Message Family/Residents <input checked="" type="checkbox"/> Publish Family Comments <input checked="" type="checkbox"/> Send Announcement <input checked="" type="checkbox"/> Manage Newsletters <input checked="" type="checkbox"/> Manage Weekly Summary 	Work Requests <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Work Requests <input checked="" type="checkbox"/> Create Work Requests <input type="checkbox"/> Manage Work Requests
Residents <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Residents <input checked="" type="checkbox"/> Manage Residents <input checked="" type="checkbox"/> Manage Resident Attachments <input checked="" type="checkbox"/> View Connections <input checked="" type="checkbox"/> Manage Connections <input checked="" type="checkbox"/> Invite Family 	Dining <ul style="list-style-type: none"> <input type="checkbox"/> View Dining <input type="checkbox"/> Manage Dining
	Other <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View/Manage Gallery <input checked="" type="checkbox"/> View Notes <input checked="" type="checkbox"/> Create Notes <input type="checkbox"/> Manage Notes <input checked="" type="checkbox"/> View Reports <input checked="" type="checkbox"/> View Displays <input checked="" type="checkbox"/> Manage Displays <input checked="" type="checkbox"/> View Staff <input checked="" type="checkbox"/> Manage Staff <input type="checkbox"/> Manage Settings <input checked="" type="checkbox"/> View Designer <input checked="" type="checkbox"/> Manage Designer <input checked="" type="checkbox"/> Order Designer Prints

Save Permissions

STAFF PERMISSIONS BY ROLE

ROLES

ADMINISTRATOR

Role: Admin

Activities <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Activity Details <input checked="" type="checkbox"/> View Activity Calendars <input checked="" type="checkbox"/> Take Attendance <input checked="" type="checkbox"/> Manage Activities <input checked="" type="checkbox"/> Manage Personal Activities <input checked="" type="checkbox"/> View Meal Calendars <input checked="" type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance Communication <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Message Family/Residents <input checked="" type="checkbox"/> Publish Family Comments <input checked="" type="checkbox"/> Send Announcement <input checked="" type="checkbox"/> Manage Newsletters <input checked="" type="checkbox"/> Manage Weekly Summary Residents <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Residents <input checked="" type="checkbox"/> Manage Residents <input checked="" type="checkbox"/> Manage Resident Attachments <input checked="" type="checkbox"/> View Connections <input checked="" type="checkbox"/> Manage Connections <input checked="" type="checkbox"/> Invite Family 	Transportation <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Transportation <input checked="" type="checkbox"/> Create Transportation Requests <input checked="" type="checkbox"/> Manage Transportation Requests Work Requests <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Work Requests <input checked="" type="checkbox"/> Create Work Requests <input checked="" type="checkbox"/> Manage Work Requests Dining <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Dining <input checked="" type="checkbox"/> Manage Dining Other <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View/Manage Gallery <input checked="" type="checkbox"/> View Notes <input checked="" type="checkbox"/> Create Notes <input checked="" type="checkbox"/> Manage Notes <input checked="" type="checkbox"/> View Reports <input checked="" type="checkbox"/> View Displays <input checked="" type="checkbox"/> Manage Displays <input checked="" type="checkbox"/> View Staff <input checked="" type="checkbox"/> Manage Staff <input checked="" type="checkbox"/> Manage Settings <input checked="" type="checkbox"/> View Designer <input checked="" type="checkbox"/> Manage Designer <input checked="" type="checkbox"/> Order Designer Prints
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DINING

Role: Dining

Activities <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Activity Details <input type="checkbox"/> View Activity Calendars <input type="checkbox"/> Take Attendance <input type="checkbox"/> Manage Activities <input type="checkbox"/> Manage Personal Activities <input checked="" type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance Communication <ul style="list-style-type: none"> <input type="checkbox"/> Message Family/Residents <input type="checkbox"/> Publish Family Comments <input type="checkbox"/> Send Announcement <input type="checkbox"/> Manage Newsletters <input type="checkbox"/> Manage Weekly Summary Residents <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Residents <input type="checkbox"/> Manage Residents <input type="checkbox"/> Manage Resident Attachments <input type="checkbox"/> View Connections <input type="checkbox"/> Manage Connections <input type="checkbox"/> Invite Family 	Transportation <ul style="list-style-type: none"> <input type="checkbox"/> View Transportation <input type="checkbox"/> Create Transportation Requests <input type="checkbox"/> Manage Transportation Requests Work Requests <ul style="list-style-type: none"> <input type="checkbox"/> View Work Requests <input type="checkbox"/> Create Work Requests <input type="checkbox"/> Manage Work Requests Dining <ul style="list-style-type: none"> <input type="checkbox"/> View Dining <input type="checkbox"/> Manage Dining Other <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View/Manage Gallery <input checked="" type="checkbox"/> View Notes <input checked="" type="checkbox"/> Create Notes <input type="checkbox"/> Manage Notes <input checked="" type="checkbox"/> View Reports <input type="checkbox"/> View Displays <input type="checkbox"/> Manage Displays <input type="checkbox"/> View Staff <input type="checkbox"/> Manage Staff <input type="checkbox"/> Manage Settings <input type="checkbox"/> View Designer <input type="checkbox"/> Manage Designer <input type="checkbox"/> Order Designer Prints
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Save Permissions

STAFF PERMISSIONS BY ROLE

ROLES

DIRECTOR OF NURSING

Role

Director of Nursing

Activities

- ☒ View Activity Details
- ☒ View Activity Calendars
- ☒ Take Attendance
- ☐ Manage Activities
- ☒ Manage Personal Activities
- ☒ View Meal Calendars
- ☐ Manage Meals
- ☒ Take Meal Attendance

Communication

- ☒ Message Family/Residents
- ☐ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters
- ☐ Manage Weekly Summary

Residents

- ☒ View Residents
- ☒ Manage Residents
- ☐ Manage Resident Attachments
- ☒ View Connections
- ☐ Manage Connections
- ☐ Invite Family

Transportation

- ☒ View Transportation
- ☒ Create Transportation Requests
- ☐ Manage Transportation Requests

Work Requests

- ☒ View Work Requests
- ☒ Create Work Requests
- ☐ Manage Work Requests

Dining

- ☐ View Dining
- ☐ Manage Dining

Other

- ☒ View/Manage Gallery
- ☒ View Notes
- ☒ Create Notes
- ☐ Manage Notes
- ☒ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☒ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer
- ☐ Order Designer Prints

FRONT DESK

Role

Front Desk

Activities

- ☒ View Activity Details
- ☒ View Activity Calendars
- ☒ Take Attendance
- ☐ Manage Activities
- ☐ Manage Personal Activities
- ☒ View Meal Calendars
- ☐ Manage Meals
- ☐ Take Meal Attendance

Communication

- ☐ Message Family/Residents
- ☐ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters
- ☐ Manage Weekly Summary

Residents

- ☒ View Residents
- ☐ Manage Residents
- ☐ Manage Resident Attachments
- ☒ View Connections
- ☐ Manage Connections
- ☐ Invite Family

Transportation

- ☒ View Transportation
- ☒ Create Transportation Requests
- ☐ Manage Transportation Requests

Work Requests

- ☒ View Work Requests
- ☒ Create Work Requests
- ☐ Manage Work Requests

Dining

- ☐ View Dining
- ☐ Manage Dining

Other

- ☒ View/Manage Gallery
- ☒ View Notes
- ☒ Create Notes
- ☐ Manage Notes
- ☒ View Reports
- ☒ View Displays
- ☐ Manage Displays
- ☒ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer
- ☐ Order Designer Prints

Save Permissions

STAFF PERMISSIONS BY ROLE

ROLES

MARKETING DIRECTOR

Role
Marketing Director

Activities

- ☒ View Activity Details
- ☒ View Activity Calendars
- ☒ Take Attendance
- ☐ Manage Activities
- ☐ Manage Personal Activities
- ☒ View Meal Calendars
- ☐ Manage Meals
- ☐ Take Meal Attendance

Transportation

- ☒ View Transportation
- ☒ Create Transportation Requests
- ☐ Manage Transportation Requests

Work Requests

- ☒ View Work Requests
- ☒ Create Work Requests
- ☐ Manage Work Requests

Dining

- ☐ View Dining
- ☐ Manage Dining

Other

- ☒ View/Manage Gallery
- ☒ View Notes
- ☒ Create Notes
- ☐ Manage Notes
- ☒ View Reports
- ☒ View Displays
- ☐ Manage Displays
- ☒ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☒ View Designer
- ☒ Manage Designer
- ☒ Order Designer Prints

Communication

- ☒ Message Family/Residents
- ☐ Publish Family Comments
- ☒ Send Announcement
- ☒ Manage Newsletters
- ☐ Manage Weekly Summary

Residents

- ☒ View Residents
- ☐ Manage Residents
- ☐ Manage Resident Attachments
- ☒ View Connections
- ☒ Manage Connections
- ☒ Invite Family

MED TECH

Role
Med Tech

Activities

- ☐ View Activity Details
- ☒ View Activity Calendars
- ☒ Take Attendance
- ☐ Manage Activities
- ☒ Manage Personal Activities
- ☒ View Meal Calendars
- ☐ Manage Meals
- ☒ Take Meal Attendance

Transportation

- ☒ View Transportation
- ☐ Create Transportation Requests
- ☐ Manage Transportation Requests

Work Requests

- ☐ View Work Requests
- ☐ Create Work Requests
- ☐ Manage Work Requests

Dining

- ☐ View Dining
- ☐ Manage Dining

Other

- ☐ View/Manage Gallery
- ☒ View Notes
- ☒ Create Notes
- ☐ Manage Notes
- ☒ View Reports
- ☒ View Displays
- ☐ Manage Displays
- ☒ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer
- ☐ Order Designer Prints

Communication

- ☐ Message Family/Residents
- ☐ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters
- ☐ Manage Weekly Summary

Residents

- ☒ View Residents
- ☐ Manage Residents
- ☐ Manage Resident Attachments
- ☐ View Connections
- ☐ Manage Connections
- ☐ Invite Family

Save Permissions

STAFF PERMISSIONS BY ROLE

ROLES

TRANSPORTATION

Role
Transportation

Activities
☐ View Activity Details
 ☐ View Activity Calendars
 ☐ Take Attendance
 ☐ Manage Activities
 ☐ Manage Personal Activities
 ☐ View Meal Calendars
 ☐ Manage Meals
 ☐ Take Meal Attendance

Communication
☐ Message Family/Residents
 ☒ Publish Family Comments
 ☐ Send Announcement
 ☐ Manage Newsletters
 ☐ Manage Weekly Summary

Residents
☒ View Residents
 ☐ Manage Residents
 ☐ Manage Resident Attachments
 ☐ View Connections
 ☐ Manage Connections
 ☐ Invite Family

Transportation
☒ View Transportation
 ☒ Create Transportation Requests
 ☒ Manage Transportation Requests

Work Requests
☐ View Work Requests
 ☐ Create Work Requests
 ☐ Manage Work Requests

Dining
☐ View Dining
 ☐ Manage Dining

Other
☐ View/Manage Gallery
 ☐ View Notes
 ☐ Create Notes
 ☐ Manage Notes
 ☒ View Reports
 ☐ View Displays
 ☐ Manage Displays
 ☐ View Staff
 ☐ Manage Staff
 ☐ Manage Settings
 ☐ View Designer
 ☐ Manage Designer
 ☐ Order Designer Prints

WORK REQUEST TECH

Role
Work Request Tech

Activities
☐ View Activity Details
 ☐ View Activity Calendars
 ☐ Take Attendance
 ☐ Manage Activities
 ☐ Manage Personal Activities
 ☐ View Meal Calendars
 ☐ Manage Meals
 ☐ Take Meal Attendance

Communication
☐ Message Family/Residents
 ☒ Publish Family Comments
 ☐ Send Announcement
 ☐ Manage Newsletters
 ☐ Manage Weekly Summary

Residents
☒ View Residents
 ☐ Manage Residents
 ☐ Manage Resident Attachments
 ☐ View Connections
 ☐ Manage Connections
 ☐ Invite Family

Transportation
☐ View Transportation
 ☐ Create Transportation Requests
 ☐ Manage Transportation Requests

Work Requests
☒ View Work Requests
 ☒ Create Work Requests
 ☒ Manage Work Requests

Dining
☐ View Dining
 ☐ Manage Dining

Other
☐ View/Manage Gallery
 ☐ View Notes
 ☐ Create Notes
 ☐ Manage Notes
 ☒ View Reports
 ☐ View Displays
 ☐ Manage Displays
 ☐ View Staff
 ☐ Manage Staff
 ☐ Manage Settings
 ☐ View Designer
 ☐ Manage Designer
 ☐ Order Designer Prints

Save Permissions

STAFF PERMISSIONS BY ROLE

QUICK TIPS



CREATE A FAKE STAFF MEMBER

If you would like to see what your staff members will now be able to do and view based on their set permissions, make a fake staff member with a username and password. Mirror your staffs permissions for that user and login with the username and password you created.



START WITH DEFAULT PERMISSIONS

Start with the default staff permissions. If you feel someone may need edits to the default permissions, you can go in later and add or remove the assigned permissions on their account.

Note: *If utilizing smart imports, permissions must match the set roles, unless only used for deletions.*



NOTIFICATIONS

Every user has notifications tied to their account. Based on permissions, the notifications have default settings. To edit or adjust, the user can do so themselves in the account information or staff members with manage staff permission can do so for them in the notifications section on their staff profile.

STAFF PERMISSIONS BY ROLE

CONTINUED LEARNING



ATTEND A LEARNING COURSE

Don't forget about the complimentary Learning Courses available to you and your team. Courses are provided monthly and cover different LifeLoop features that you can register to attend. Emails with the topics and schedules are also sent monthly.



VISIT THE LEARNING COMMUNITY

Access LifeLoop marketing collateral and training resources at your convenience.

Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to <https://ourlifeloop.com/training/staff>.



FURTHER QUESTIONS?

Reach out to Support@OurLifeLoop.com or your Customer Relationship Specialist.