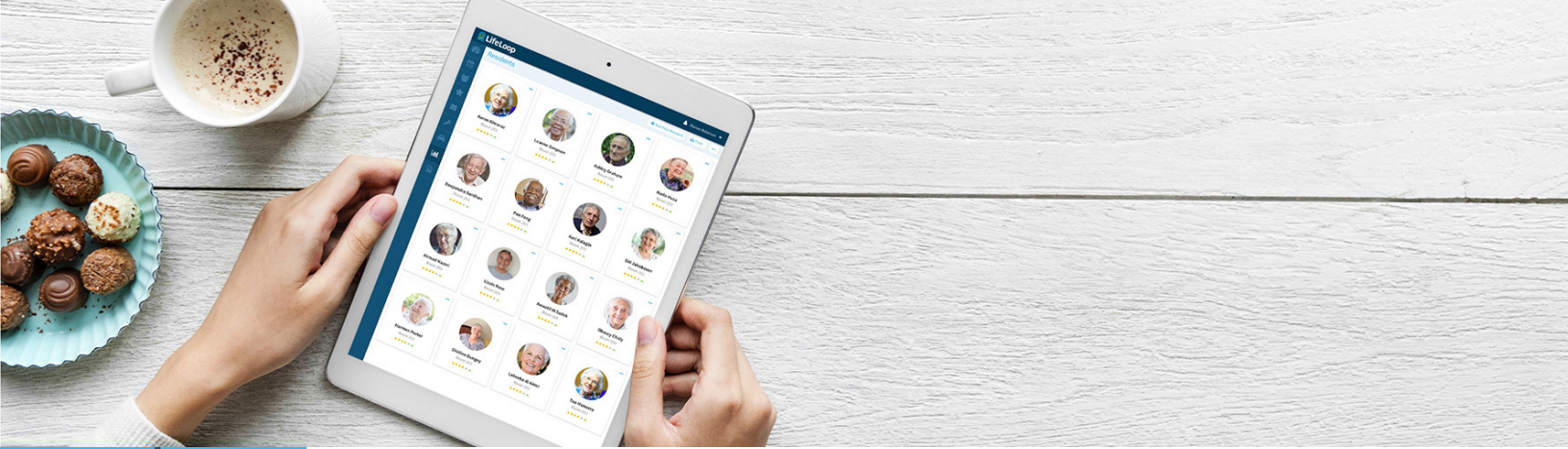


# STAFF PERMISSIONS

Detailed description of LifeLoop's staff permissions and the notifications tied to them.



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# STAFF PERMISSIONS

## DESCRIPTIONS SUMMARIZED



### VIEW

Staff user will be able to view that feature but not be able to add, edit or delete.



### CREATE

Staff user will be able to create a new request, but cannot manage, delete or change it's status.



### MANAGE

Staff user has full access to create, edit, delete and change status of item.



### 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

## PERMISSION HIERARCHY

### ► BLUE VERSUS GREY CHECKMARK

When editing permissions you may notice some have a greyed out checkbox while others are blue. If a permission has a grey checkbox it means that it is required to be selected in order to have a higher level permission that is also selected.

#### Activities

- ☐ View Activity Details
- ☐ View Activity Calendars
- ☒ Take Attendance

#### Transportation

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

### ► HIERARCHY EXAMPLE

An example of this would be Manage Transportation Requests. In order to Manage the Requests a staff user has to be able to Create. Therefore, if Manage Transportation Requests is checked, Create and View will be greyed out and cannot be unselected. If that higher level permission is unselected, as seen below then the Create Transportation will become a blue check and can be unselected.

#### Activities

- ☐ View Activity Details
- ☒ View Activity Calendars
- ☐ Take Attendance

#### Transportation

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

# STAFF PERMISSIONS

## NOTIFICATIONS, UNUSED FEATURES AND ROLES



### STAFF NOTIFICATIONS

For information on how to manage notifications and the different types please visit the Staff Management section of our learning community and reference the document "Manage Staff Notifications". Any permission tied to a staff notification will be noted in this document. All notifications are dependent on the staff user having the notification preference set in their profile.



### PERMISSIONS FOR UNUSED FEATURES

If your community has a feature turned off the permissions associated will not appear as options. Similarly, if a staff member does not have permission to a specific feature they will not see it when logged in to LifeLoop.



### PERMISSION ROLES

To understand the different role selections and which permissions are tied to the preset roles please visit the Staff Management section of our learning community and reference the document "Staff Permission".

# STAFF PERMISSIONS

## ACTIVITY PERMISSIONS IN DETAIL



### VIEW ACTIVITY DETAILS

Staff user can select a calendar activity and view the description, registered and attended residents, photos and notes tied to the activity.

#### Activities

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



### VIEW ACTIVITY CALENDARS

Staff user will see the calendar feature in the menu bar and can view all activities on an activity type calendar.



### TAKE ATTENDANCE

Staff user can register and take attendance of residents on an activity calendar.



### MANAGE ACTIVITIES

Staff user can add, edit or delete activities from an activity type calendar.



### MANAGE PERSONAL ACTIVITIES

Staff user can add and log a personal activity to a resident's profile. Personal activities are any non scheduled resident activities such as a one on one.

# STAFF PERMISSIONS

## ACTIVITY PERMISSIONS IN DETAIL



### VIEW MEAL CALENDARS

Staff user can access and view any meal calendar events tied to the community. A meal calendar is often used for tracking meal attendance.

#### Activities

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



### MANAGE MEALS

Staff user can add, edit or delete meal events from a meal type calendar.



### TAKE MEAL ATTENDANCE

Staff user can register and take attendance of residents on an activity calendar.



# STAFF PERMISSIONS

## COMMUNICATION PERMISSIONS IN DETAIL



### MESSAGE FAMILY/RESIDENTS

Staff user can send and receive a message in LifeLoop to or from residents and resident connections.

*\*Notification of New Message.*

#### Communication

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



### PUBLISH FAMILY COMMENTS

Maintenance and Transportation comments are private internal staff view by default. Staff user can publish a comment in order to make public for the connection or resident to view on requests created by the resident or connection.



### SEND ANNOUNCEMENTS

Staff user can create and send an announcement in LifeLoop to staff, resident and connections.

*\*Notification of New Announcement received.*



### MANAGE NEWSLETTERS

Staff user can upload and publish newsletter documents to staff, residents and connections.

*\*Notification when recipient of a newsletter.*



### MANAGE WEEKLY SUMMARY

Staff user can edit and customize the message included in the weekly summary email that is sent to resident connections.



# STAFF PERMISSIONS

## RESIDENTS PERMISSIONS IN DETAIL



### VIEW RESIDENTS

Staff user can view all resident information: profile about page, activity feed, my calendar. Must have additional permissions in order to view gallery, notes and reports. Staff user cannot edit the resident, add likes etc.

#### Residents

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



### MANAGE RESIDENTS

Staff user can add, edit, delete and change status of residents in LifeLoop.



### MANAGE RESIDENT ATTACHMENTS

Staff user can add and delete resident attachments.



### VIEW CONNECTIONS

Staff user can view connections and the connection's information.



### MANAGE CONNECTIONS

Staff user can add, edit and delete a connection in LifeLoop but must have the invite permission to send an invitation email for the connection to register.



### INVITE FAMILY

Staff user can send the invitation welcome email that allows a connection to register and login to LifeLoop. Without this a connection will simply receive announcements via email or text.

# STAFF PERMISSIONS

## PHOTOS, ALBUMS AND TAGS PERMISSIONS IN DETAIL



### VIEW PHOTO GALLERY

Staff user can view photos in the community photo library and the resident's profile gallery. This user cannot download or upload any photos to the photo library.

#### Photos, Albums, and Tags

- ☐ View Photo Gallery
- ☐ Create and Categorize Photos
- ☒ Manage Photo Albums and Tags



### CREATE AND CATEGORIZE PHOTOS

Staff user can add and remove photos to albums and add tags to photos in the community photo library and resident's gallery.



### MANAGE PHOTO ALBUMS AND TAGS

Staff user can create albums and create tags in the community photo library.

# STAFF PERMISSIONS

## TRANSPORTATION



### VIEW TRANSPORTATION

Staff user can view and add comments to all transportation requests. If they are the driver assigned to that request they can also update the status and edit the request.

#### Transportation

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



### CREATE TRANSPORTATION REQUESTS

Staff user can create new requests.

*\*Notification for status change or comment to a request staff user inputted.*



### MANAGE TRANSPORTATION REQUESTS

Staff user can add, edit, delete and change status of all requests.

*\*Notification for any new, incoming requests.*

**Note:** Drivers will also receive notifications when assigned to a request. For a staff user to be set as a driver in settings they must at minimum have view transportation permission.

# STAFF PERMISSIONS

## WORK REQUESTS



### VIEW WORK REQUESTS

Staff user can view and add comments to all work requests.

If they are the crew member assigned to that work order they can also update the status and edit the request.

#### Work Requests

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



### CREATE WORK REQUESTS

Staff user can create new requests.

*\*Notification for status change or comment to a request staff user inputted.*



### MANAGE WORK REQUESTS

Staff user can add, edit, delete and change status of all requests.

*\*Notification for any new, incoming requests.*

**Note:** Crew members will also receive notification when assigned to a request. For a staff user to be set as a crew member in settings they must at minimum have view work requests permission.

# STAFF PERMISSIONS

## OTHER



### VIEW NOTES

Staff user can view notes within an activity and resident as long as they have the view resident and view activity permissions.

*\*Notification when a new note was added by another staff user.*



### CREATE NOTES

Staff user can create notes.



### MANAGE NOTES

*Staff user can edit and delete notes.*



### VIEW REPORTS

*Staff user can view reports section. These may include reports for activities, residents, maintenance and transportation. Must have view maintenance permissions to view the reports on maintenance.*



### VIEW DISPLAYS

*Staff user can view displays and access the display codes.*



### MANAGE DISPLAYS

*Staff user can create, edit and delete displays.*

#### Other

- ☒ 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

# STAFF PERMISSIONS

## OTHER



### VIEW STAFF

Staff user can view staff members section.



### MANAGE STAFF

Staff user can create, edit and delete staff members. This includes managing their permissions, notifications and account login information.



### MANAGE SETTINGS

Staff user can edit community default settings for activities, maintenance and transportation. These include activity locations, maintenance crew members, types etc. This also includes community logo and address.



### VIEW DESIGNER

Staff user can view, print and download designer projects.



### MANAGE DESIGNER

Staff user can create, edit and delete all designer projects.



### ORDER DESIGNER PRINTS

Staff user can order professional prints from the designer. LifeLoop partners with Activity Connection for prints. This is an extra charge, invoiced directly by Activity Connection and is a feature that can be turned on or off.

#### Other

- ☒ 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

# STAFF PERMISSIONS

## CONTINUED LEARNING



### ATTEND A UNIVERSITY COURSE

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.



### 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](mailto:Support@OurLifeLoop.com) or your Customer Relationship Specialist.