



LifeLoop Trainings

Staff Permissions by Role

Staff Management

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

lifeloop.com

Version 0923





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View and Edit Staff Permissions

Step 1

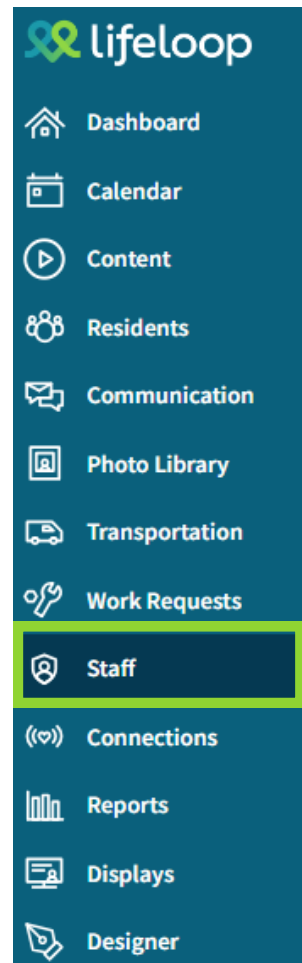
LOCATE THE STAFF TAB

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.



Edit Staff

Permissions

Set a staff's permissions by role or by selecting the individual permissions below. Note, some permissions will become disabled if they are required based on the other selected permissions.

Role: Admin

Activities

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

Photos, Albums, and Tags

- ☒ View All Photos
- ☒ Upload and Categorize Photos
- ☒ Download and Delete Photos
- ☒ Manage Albums and Tags

Transportation

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

Work Requests

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

Communication

- ☒ Message Family/Residents
- ☒ Publish Family Comments
- ☒ Send Announcement



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



Descriptions Summarized

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 Hierarchy

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.



Roles

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 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 | Photos, Albums, and Tags <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View All Photos <input checked="" type="checkbox"/> Upload and Categorize Photos <input checked="" type="checkbox"/> Download and Delete Photos <input type="checkbox"/> Manage Albums and Tags 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 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 Other <ul style="list-style-type: none"> <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 checked="" 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

Activity Assistant

Role: **Activity Assistant**

| | |
|--|--|
| Activities <ul style="list-style-type: none"> <input type="checkbox"/> View Activity Details <input type="checkbox"/> View Activity Calendars <input checked="" type="checkbox"/> Take Attendance <input type="checkbox"/> Manage Activities <input type="checkbox"/> Manage Personal Activities <input 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 | Photos, Albums, and Tags <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View All Photos <input checked="" type="checkbox"/> Upload and Categorize Photos <input type="checkbox"/> Download and Delete Photos <input type="checkbox"/> Manage Albums and Tags 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 Other <ul style="list-style-type: none"> <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 |
|--|--|

Save Permissions



Roles

Administrator

Role

Admin

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

Photos, Albums, and Tags

- ☒ View All Photos
- ☐ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☒ Manage Albums and Tags

Transportation

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

Work Requests

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

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

Save Permissions

Dining

Role

Dining

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

Photos, Albums, and Tags

- ☒ View All Photos
- ☒ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☐ Manage Albums and Tags

Transportation

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

Work Requests

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

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

Save Permissions



Roles

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

Photos, Albums, and Tags

- ☒ View All Photos
- ☒ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☐ Manage Albums and Tags

Transportation

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

Work Requests

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

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

Save Permissions

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

Photos, Albums, and Tags

- ☒ View All Photos
- ☒ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☐ Manage Albums and Tags

Transportation

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

Work Requests

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

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

Save Permissions



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

Photos, Albums, and Tags

- ☐ View All Photos
- ☐ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☒ Manage Albums and Tags

Communication

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

Transportation

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

Residents

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

Work Requests

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

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

Save Permissions

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

Photos, Albums, and Tags

- ☐ View All Photos
- ☐ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☐ Manage Albums and Tags

Communication

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

Transportation

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

Residents

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

Work Requests

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

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

Save Permissions



Roles

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

Photos, Albums, and Tags

- ☐ View All Photos
- ☐ Upload and Categorize Photos
- ☐ Download and Delete Photos
- ☐ Manage Albums and Tags

Transportation

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

Communication

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

Residents

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

Work Requests

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

Other

- ☐ View Notes
- ☐ Create Notes
- ☐ Manage Notes
- ☒ View Reports
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- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
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- ☐ Manage Designer
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Save Permissions

Transportation

Role

Transportation

Activities

- ☐ View Activity Details
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- ☐ Manage Connections
- ☐ Invite Family

Work Requests

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

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

Save Permissions



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 staff's 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.



Continued Learning

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://training.lifeloop.com/training/staff>.

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.

Further questions?

Reach out to Support@LifeLoop.com or your Customer Success Manager.