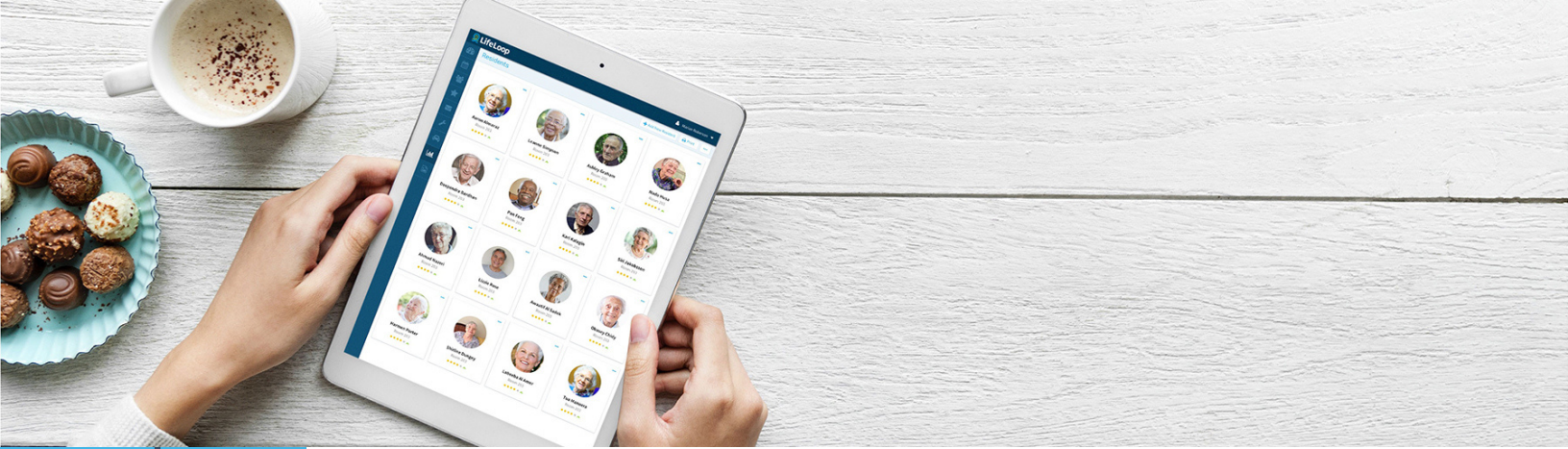


STAFF PERMISSIONS BY ROLE

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



INDEX

Section 1	View and Edit Staff Permissions.....	pg 1
Section 2	Default Permissions.....	pg 2
Section 3	Descriptions Summarized.....	pg 3
Section 4	Roles.....	pg 4-8
Section 5	Quick Tips.....	pg 9
Section 6	Continued Learning.....	pg 10

STAFF PERMISSIONS BY ROLE

VIEW AND EDIT STAFF PERMISSIONS

STEP 1

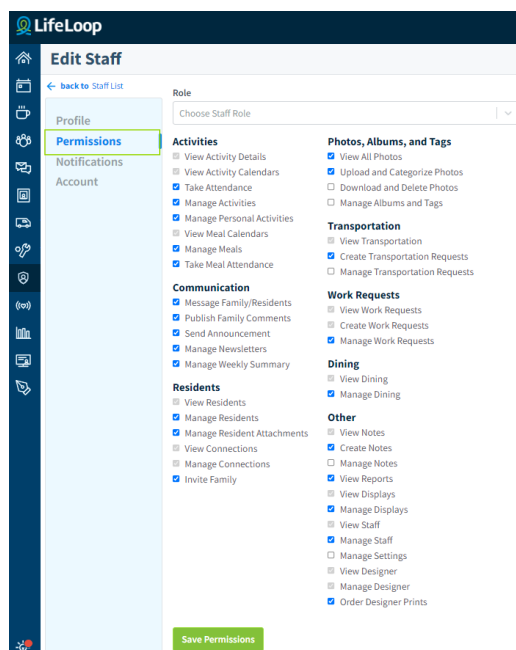
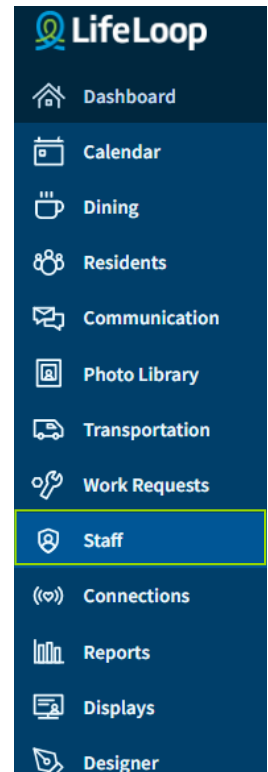
LOCATE THE STAFF TAB

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

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 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 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 	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
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 	Transportation <ul style="list-style-type: none"> <input type="checkbox"/> View Transportation <input type="checkbox"/> Create Transportation Requests <input type="checkbox"/> Manage Transportation Requests
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	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 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 type="checkbox"/> View Activity Details <input 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 type="checkbox"/> View Meal Calendars <input checked="" type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	Photos, Albums, and Tags <ul style="list-style-type: none"> <input type="checkbox"/> View All Photos <input type="checkbox"/> Upload and Categorize Photos <input checked="" type="checkbox"/> Download and Delete Photos <input type="checkbox"/> Manage Albums and Tags
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	Dining <ul style="list-style-type: none"> <input type="checkbox"/> View Dining <input type="checkbox"/> Manage Dining
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STAFF PERMISSIONS BY ROLE

ROLES

ADMINISTRATOR

Role
Admin

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

Role
Dining

Activities <ul style="list-style-type: none"> <input 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 type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	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
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STAFF PERMISSIONS BY ROLE

ROLES

DIRECTOR OF NURSING

Role: Director of Nursing

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 checked="" type="checkbox"/> Manage Personal Activities <input type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	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
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FRONT DESK

Role: Front Desk

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 checked="" type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input type="checkbox"/> Take Meal Attendance 	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
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STAFF PERMISSIONS BY ROLE

ROLES

MARKETING DIRECTOR

Role: Marketing Director

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 checked="" type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input type="checkbox"/> Take Meal Attendance 	Photos, Albums, and Tags <ul style="list-style-type: none"> <input type="checkbox"/> View All Photos <input type="checkbox"/> Upload and Categorize Photos <input type="checkbox"/> Download and Delete Photos <input checked="" type="checkbox"/> Manage Albums and Tags
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MED TECH

Role: Med Tech

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 checked="" type="checkbox"/> Manage Personal Activities <input type="checkbox"/> View Meal Calendars <input type="checkbox"/> Manage Meals <input checked="" type="checkbox"/> Take Meal Attendance 	Photos, Albums, and Tags <ul style="list-style-type: none"> <input type="checkbox"/> View All Photos <input type="checkbox"/> Upload and Categorize Photos <input type="checkbox"/> Download and Delete Photos <input type="checkbox"/> Manage Albums and Tags
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STAFF PERMISSIONS BY ROLE

ROLES

TRANSPORTATION

Role
Transportation

Activities <ul style="list-style-type: none"><input 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 type="checkbox"/> View Meal Calendars<input type="checkbox"/> Manage Meals<input type="checkbox"/> Take Meal Attendance	Photos, Albums, and Tags <ul style="list-style-type: none"><input type="checkbox"/> View All Photos<input type="checkbox"/> Upload and Categorize Photos<input type="checkbox"/> Download and Delete Photos<input type="checkbox"/> Manage Albums and Tags
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WORK REQUEST TECH

Role
Work Request Tech

Activities <ul style="list-style-type: none"><input 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 type="checkbox"/> View Meal Calendars<input type="checkbox"/> Manage Meals<input type="checkbox"/> Take Meal Attendance	Photos, Albums, and Tags <ul style="list-style-type: none"><input type="checkbox"/> View All Photos<input type="checkbox"/> Upload and Categorize Photos<input type="checkbox"/> Download and Delete Photos<input type="checkbox"/> Manage Albums and Tags
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	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 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

STAFF PERMISSIONS BY ROLE

ROLES



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 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 or your Customer Relationship Specialist.