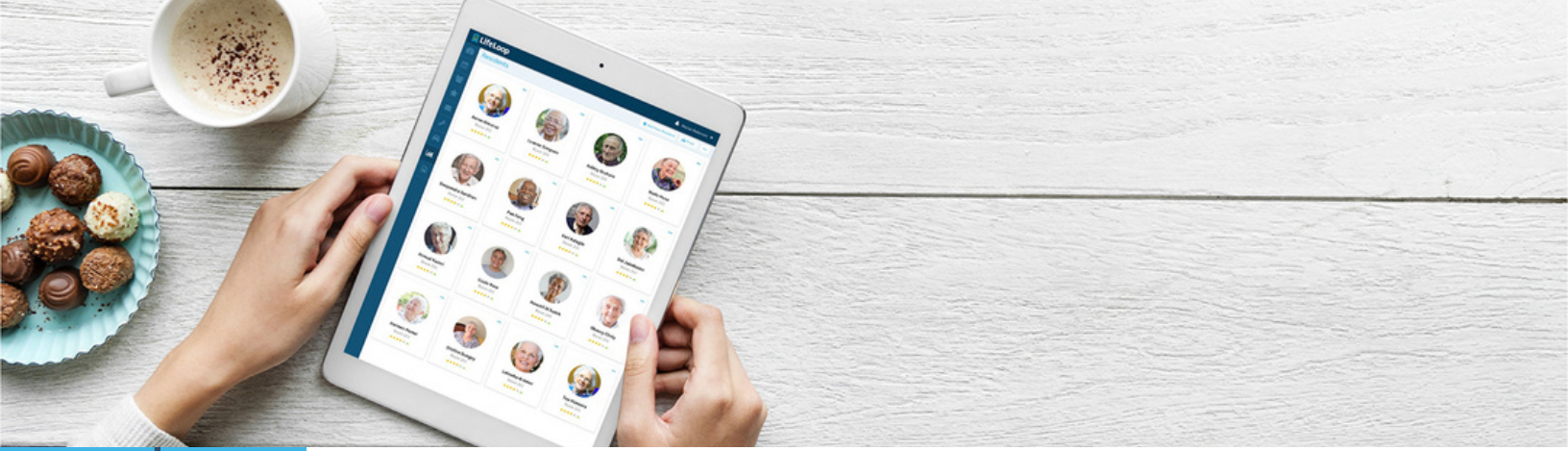


# STAFF PERMISSIONS BY ROLE

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

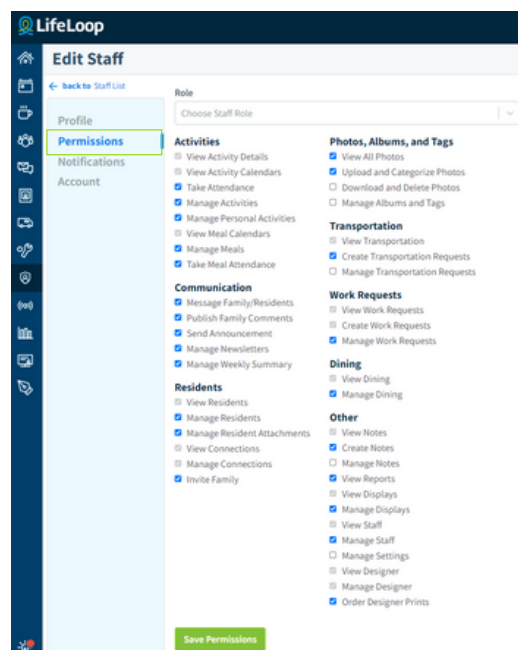
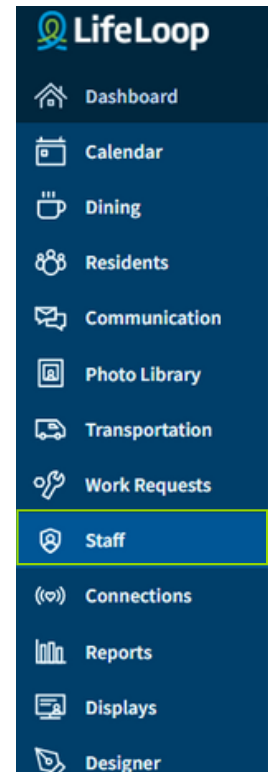
#### LOCATE THE STAFF TAB

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

## 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.

# STAFF PERMISSIONS BY ROLE

## ROLES

### ACTIVITY ASSISTANT

Role: Activity Assistant

<b>Activities</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> View Activity Details</li> <li><input type="checkbox"/> View Activity Calendars</li> <li><input checked="" type="checkbox"/> Take Attendance</li> <li><input type="checkbox"/> Manage Activities</li> <li><input type="checkbox"/> Manage Personal Activities</li> <li><input type="checkbox"/> View Meal Calendars</li> <li><input type="checkbox"/> Manage Meals</li> <li><input checked="" type="checkbox"/> Take Meal Attendance</li> </ul>	<b>Photos, Albums, and Tags</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> View All Photos</li> <li><input checked="" type="checkbox"/> Upload and Categorize Photos</li> <li><input type="checkbox"/> Download and Delete Photos</li> <li><input type="checkbox"/> Manage Albums and Tags</li> </ul>
<b>Communication</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Message Family/Residents</li> <li><input type="checkbox"/> Publish Family Comments</li> <li><input type="checkbox"/> Send Announcement</li> <li><input type="checkbox"/> Manage Newsletters</li> <li><input type="checkbox"/> Manage Weekly Summary</li> </ul>	<b>Transportation</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> View Transportation</li> <li><input type="checkbox"/> Create Transportation Requests</li> <li><input type="checkbox"/> Manage Transportation Requests</li> </ul>
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	<b>Other</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> View Notes</li> <li><input type="checkbox"/> Create Notes</li> <li><input type="checkbox"/> Manage Notes</li> <li><input checked="" type="checkbox"/> View Reports</li> <li><input type="checkbox"/> View Displays</li> <li><input type="checkbox"/> Manage Displays</li> <li><input type="checkbox"/> View Staff</li> <li><input type="checkbox"/> Manage Staff</li> <li><input type="checkbox"/> Manage Settings</li> <li><input type="checkbox"/> View Designer</li> <li><input type="checkbox"/> Manage Designer</li> <li><input type="checkbox"/> Order Designer Prints</li> </ul>

### ACTIVITY DIRECTOR

Role: Activity Director

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

## ROLES

## ADMINISTRATOR

Role  
Admin

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

Role  
Dining

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

## ROLES

### DIRECTOR OF NURSING

Role: Director of Nursing

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

Role: Front Desk

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

## ROLES

## MARKETING DIRECTOR

Role: Marketing Director

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

Role: Med Tech

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

## ROLES

## TRANSPORTATION

Role  
Transportation

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

## WORK REQUEST TECH

Role  
Work Request Tech

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

# 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 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.

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