

# STAFF PERMISSIONS

Easily assign customized permissions and cater each staff member's view of LifeLoop.

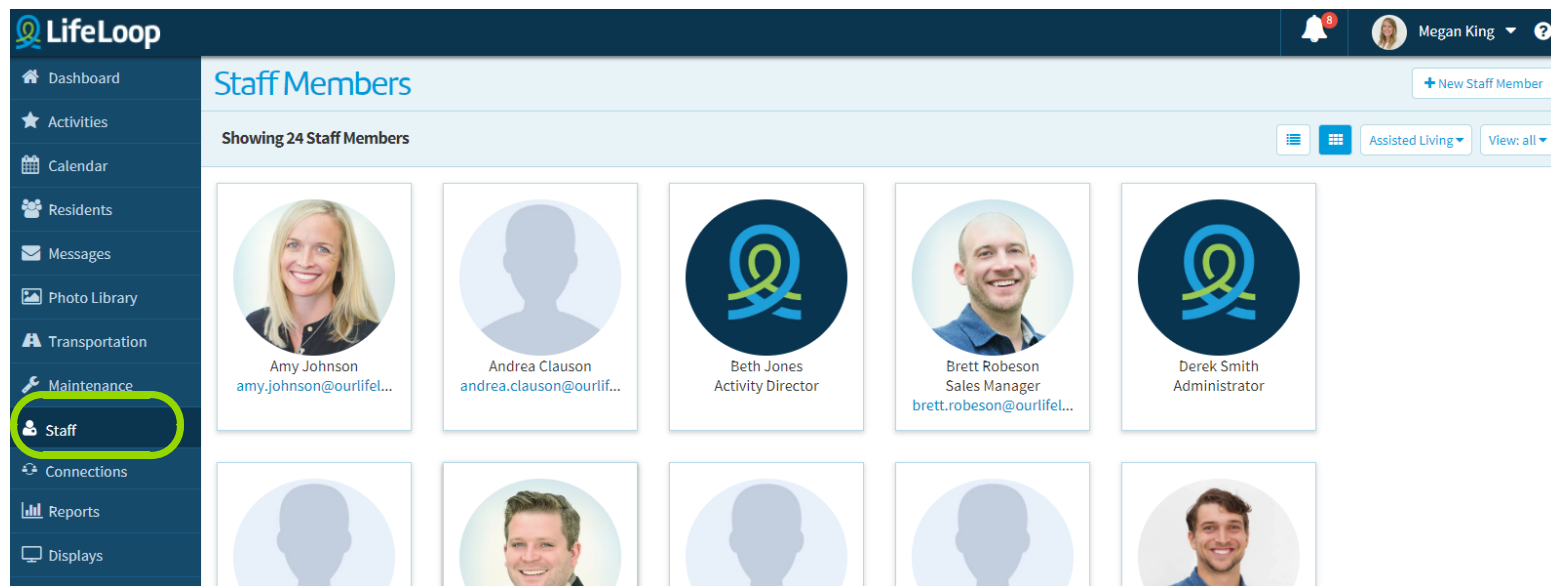
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# Tips for Getting Started

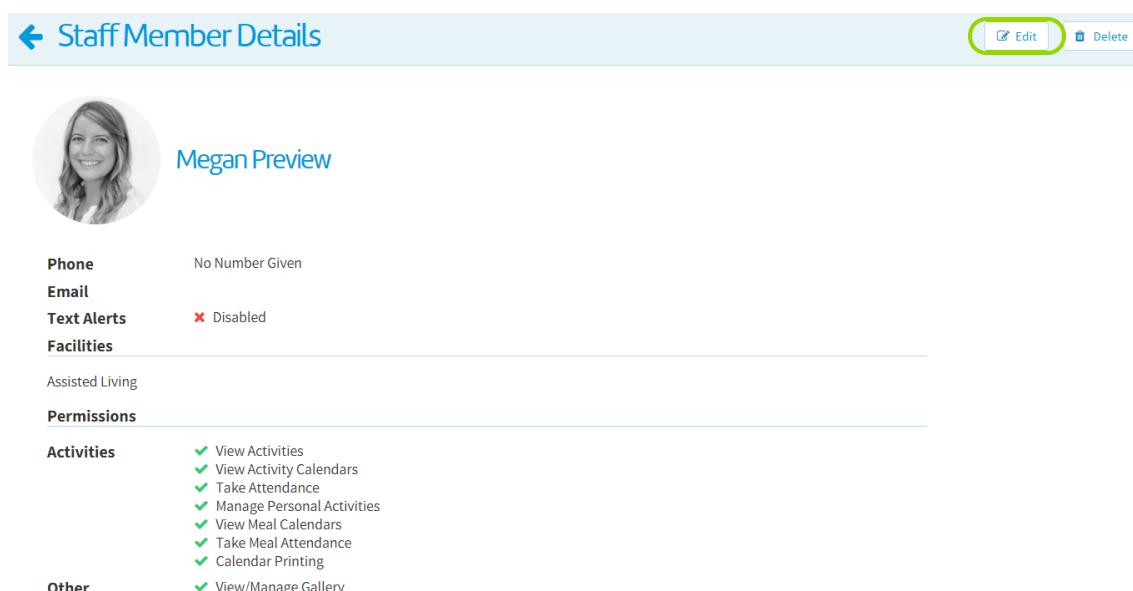
## LOCATE THE STAFF TAB ■■■■■



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

## VIEW AND EDIT STAFF PERMISSIONS ■■■■■

- To view or edit staff permissions simply select that staff member and select edit on the top, right-hand side.



# Staff Permissions Basics

## STEP 1 - CHOOSE A ROLE ■■■■■

- Select a Role from the dropdown menu. By choosing a role it will link the relevant permissions for this role. These can be edited and added to manually but this will provide the base for this staff member. The roles are as follows:

- Activity Assistant
- Activity Director
- Admin
- Dining
- Director of Nursing
- Front Desk
- Maintenance
- Marketing Director
- Transportation

← Edit Staff Member  
\* indicates a required field

Change Image

Permissions

Activity Assistant

**Activities**

- ☒ View Activities
- ☒ View Activity Calendars
- ☒ Take Attendance
- ☐ Manage Activities
- ☐ Manage Personal Activities
- ☒ View Meal Calendars
- ☐ Manage Meals
- ☒ Take Meal Attendance
- ☐ Calendar Printing
- ☐ Calendar Designer

**Communication**

- ☐ Message Family/Residents
- ☐ Publish Family Comments
- ☐ Send Broadcast

**Other**

- ☒ View/Manage Gallery
- ☐ Manage Notes
- ☒ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Edit Facilities

**Transportation**

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

**Maintenance**

- ☐ View Maintenance
- ☐ Create Maintenance Requests
- ☐ Manage Maintenance Requests

**Residents**

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

## STEP 2 - CUSTOMIZE ROLE'S PERMISSIONS ■■■■■

- Once a Role has been selected you can manually edit and add permissions by simply clicking on the grey box to the left of the role.
  - **Please Note:** If a checkmark is grey it means it is tied to a higher permission and cannot be deleted unless the higher permission is un-checked. An example of this is if a staff member has the permission to *Take Attendance* they will also have to be able to *View Activities*.

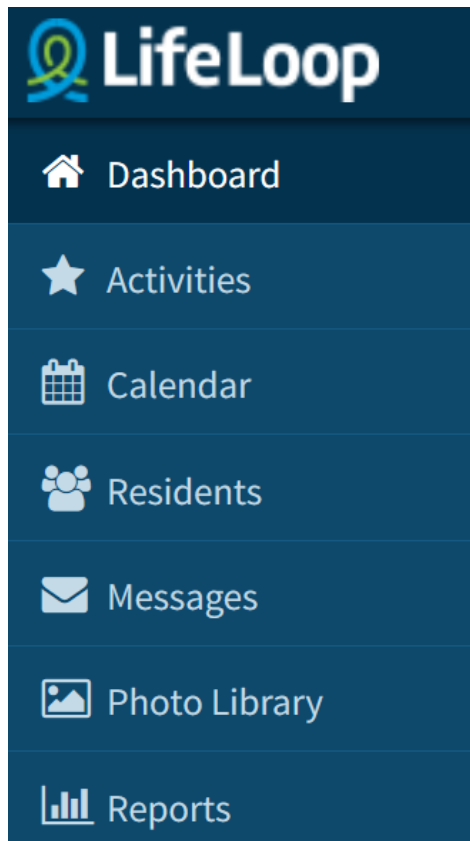
# Staff Permissions Basics

## STAFF ROLES AND THEIR VIEWS .....

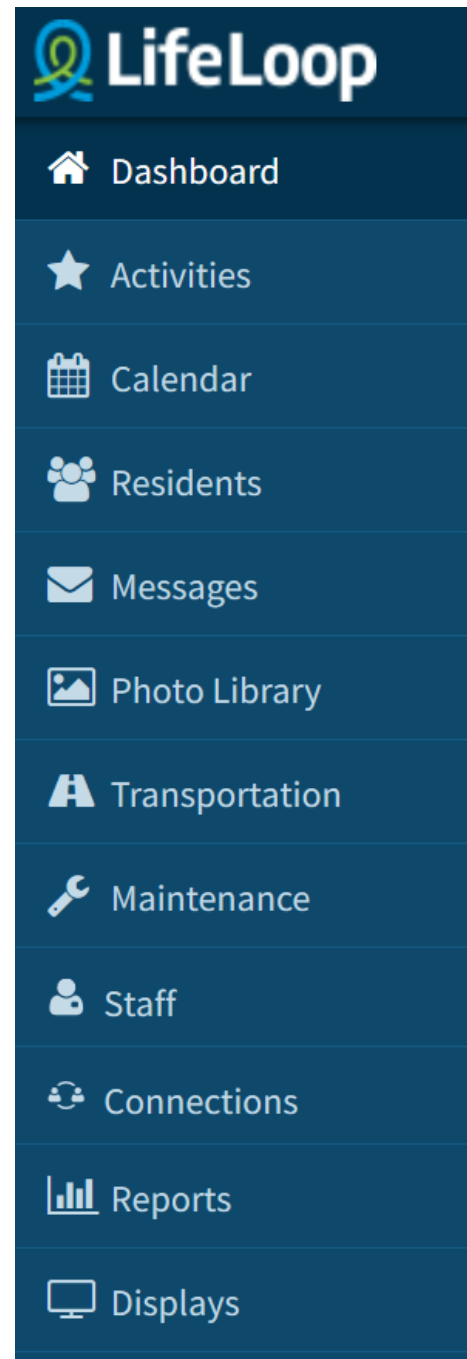
### Activity Assistant

VS.

### Activity Director



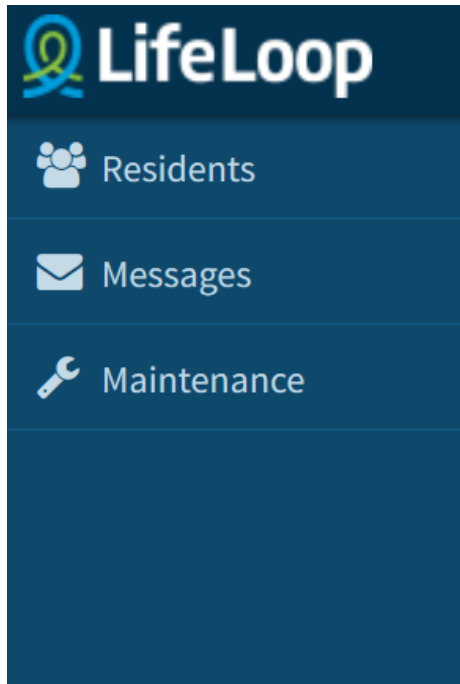
- Allow staff to track attendance without allowing them to change or edit your calendar.



# Staff Permissions Basics

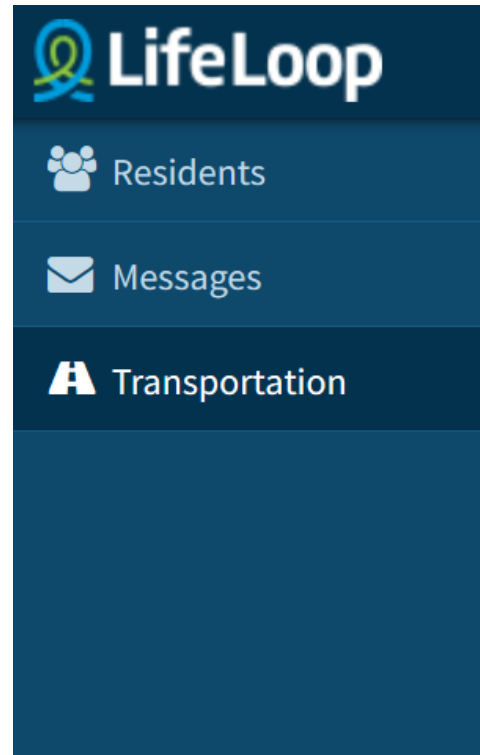
## STAFF ROLES AND THEIR VIEWS .....

### Maintenance



VS.

### Transportation



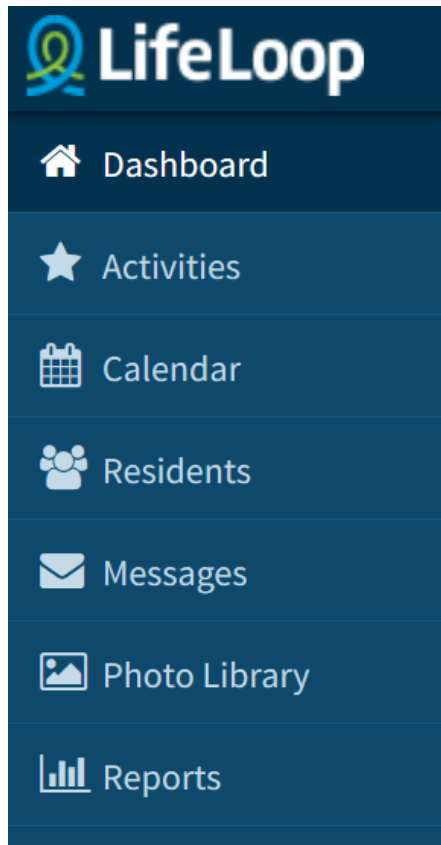
- Decide which staff members can create work orders, view and manage the to-do list.

- Decide which staff members can create transportation requests or manage requests by approving or denying.

# Staff Permissions Basics

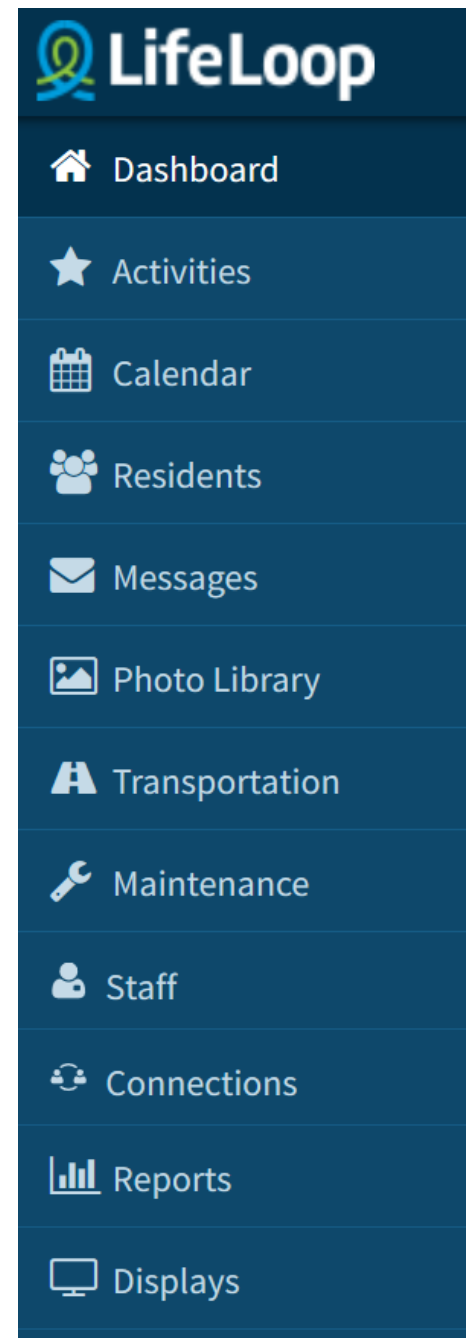
## STAFF ROLES AND THEIR VIEWS .....

### Dining



VS.

### Front Desk



- Give dining staff the ability to view, manage and track on the meal calendar.
- Allow your front desk to create and view requests, view the calendar and track attendance.



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