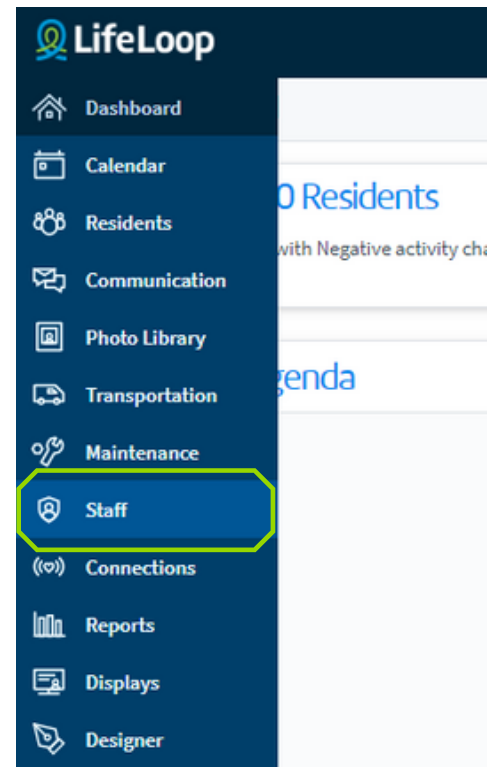# STAFF PERMISSION BY ROLE

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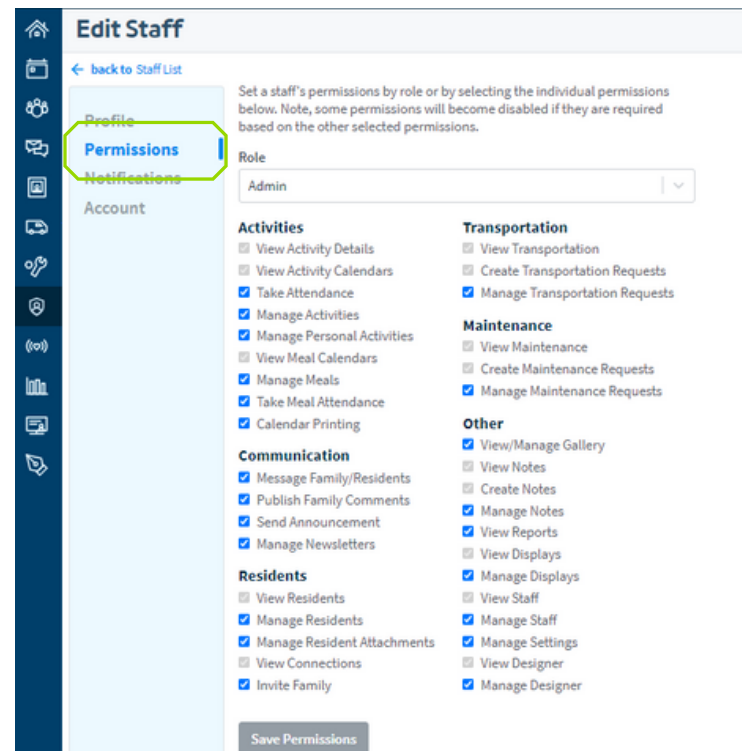
LifeLoop

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 permissions on the left hand side.

DEFAULT PERMISSIONS • • • • •

We have outlined all of the Default permissions for each role in Lifeloop. These will be what are assigned upon our 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. These can be edited and added to manually but this will provide the base for this staff member.

Please Note: Further customization of these permissions can be made once the site has been setup, and you have logged in with the permission "Manage Staff".

KEYWORD = STAFF ROLE

Activity Director = Activity Director
Admin = Administrator
Activity Assistant = Activity Assistant
DON = Director of Nursing
Front Desk = Front Desk
Dining = Dining
Marketing = Marketing Director
Transportation = Transportation
Maintenance = Maintenance
Med Tech = Med Tech

The blue checkmarks indicate a permission that requires the greyed out checkmarks to be selected. For example: You would not be able to take attendance if you are unable to view the activities on the calendar

ACTIVITY DIRECTOR ·····

Role

Activity Director ▾

Activities
- ☑ View Activity Details
- ☑ View Activity Calendars
- ☑ Take Attendance
- ☑ Manage Activities
- ☑ Manage Personal Activities
- ☑ View Meal Calendars
- ☑ Manage Meals
- ☑ Take Meal Attendance
- ☑ Calendar Printing

Communication
- ☑ Message Family/Residents
- ☑ Publish Family Comments
- ☑ Send Announcement
- ☑ Manage Newsletters

Residents
- ☑ View Residents
- ☑ Manage Residents
- ☑ Manage Resident Attachments
- ☑ View Connections
- ☑ Invite Family

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

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

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☑ View Displays
- ☑ Manage Displays
- ☑ View Staff
- ☑ Manage Staff
- ☐ Manage Settings
- ☑ View Designer
- ☑ Manage Designer

Save Permissions

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
- ☑ Calendar Printing

Communication
- ☑ Message Family/Residents
- ☑ Publish Family Comments
- ☑ Send Announcement
- ☑ Manage Newsletters

Residents
- ☑ View Residents
- ☑ Manage Residents
- ☑ Manage Resident Attachments
- ☑ View Connections
- ☑ Invite Family

Transportation
- ☑ View Transportation
- ☑ Create Transportation Requests
- ☑ Manage Transportation Requests

Maintenance
- ☑ View Maintenance
- ☑ Create Maintenance Requests
- ☑ Manage Maintenance Requests

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☑ Manage Notes
- ☑ View Reports
- ☑ View Displays
- ☑ Manage Displays
- ☑ View Staff
- ☑ Manage Staff
- ☑ Manage Settings
- ☑ View Designer
- ☑ Manage Designer

Save Permissions

ACTIVITY ASSISTANT · · · · ·

Role

Activity Assistant ⌄

Activities
- ☑ View Activity Details
- ☑ View Activity Calendars
- ☑ Take Attendance
- ☐ Manage Activities
- ☐ Manage Personal Activities
- ☑ View Meal Calendars
- ☐ Manage Meals
- ☑ Take Meal Attendance
- ☐ Calendar Printing

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

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

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

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

Other
- ☑ View/Manage Gallery
- ☐ View Notes
- ☐ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

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
- ☐ Calendar Printing

Communication
- ☑ Message Family/Residents
- ☐ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters

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

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

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

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☑ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

Save Permissions

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
- ☑ Calendar Printing

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

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

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

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

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☑ View Displays
- ☐ Manage Displays
- ☑ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

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
- ☑ Calendar Printing

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

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

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

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

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

Save Permissions

MARKETING DIRECTOR

TRANSPORTATION

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
- ☑ Calendar Printing

Communication
- ☑ Message Family/Residents
- ☐ Publish Family Comments
- ☑ Send Announcement
- ☑ Manage Newsletters

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

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

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

Other
- ☑ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☑ View Displays
- ☐ Manage Displays
- ☑ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☑ View Designer
- ☑ Manage Designer

Save Permissions

Transportation

Role

Transportation ▾

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

Communication
- ☐ Message Family/Residents
- ☑ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters

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

Transportation
- ☑ View Transportation
- ☑ Create Transportation Requests
- ☑ Manage Transportation Requests

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

Other
- ☐ View/Manage Gallery
- ☐ View Notes
- ☐ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

Save Permissions

MAINTENANCE

MED TECH

Role
Maintenance ▼

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

Communication
- ☐ Message Family/Residents
- ☑ Publish Family Comments
- ☐ Send Announcement
- ☐ Manage Newsletters

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

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

Maintenance
- ☑ View Maintenance
- ☑ Create Maintenance Requests
- ☑ Manage Maintenance Requests

Other
- ☐ View/Manage Gallery
- ☐ View Notes
- ☐ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☐ View Displays
- ☐ Manage Displays
- ☐ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

Save Permissions

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
- ☐ Calendar Printing

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

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

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

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

Other
- ☐ View/Manage Gallery
- ☑ View Notes
- ☑ Create Notes
- ☐ Manage Notes
- ☑ View Reports
- ☑ View Displays
- ☐ Manage Displays
- ☑ View Staff
- ☐ Manage Staff
- ☐ Manage Settings
- ☐ View Designer
- ☐ Manage Designer

Save Permissions

PERMISSIONS DICTIONARY ·····

View

Ability to only view the information no ability to edit

Create

The ability to make a request without the ability to edit or change a status.

Manage

The ability to create, edit and delete information.

MESSAGE VS ANNOUNCEMENT ·····

Message

- Can only go to users with a LifeLoop account.

- Communication with one individual or a small group of individuals that can see each others replies.

- Available via text or email notification that will notify of a received message.

- Will need to log in to view a message.

Announcement

- Do not need a LifeLoop account to receive an announcement.

- Mass communication to a large group of users or specific group.

- Available to receive notifications via email, text and in the app.

- Any replies will only be sent to the sender of the announcment and only recipients with a LifeLoop account are able to reply.

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 log in and password. Log in using that fake staff members information and view their now set permissions and options.

Start with Default permissions

- Start with the default staff permissions. If you feel someone may need additional permissions added to their personal settings, you can go in later and add on the additional permissions to their settings.

LifeLoop
Trainings

CONTACT US:

support@ourlifeloop.com

LifeLoop