HOW DO I EDIT PERMISSIONS IN THE FAMILY ROOM?

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How do I edit permissions in the Family Room?

Within the Family Room, you can select if certain contacts have more or less access than others via the People tab.

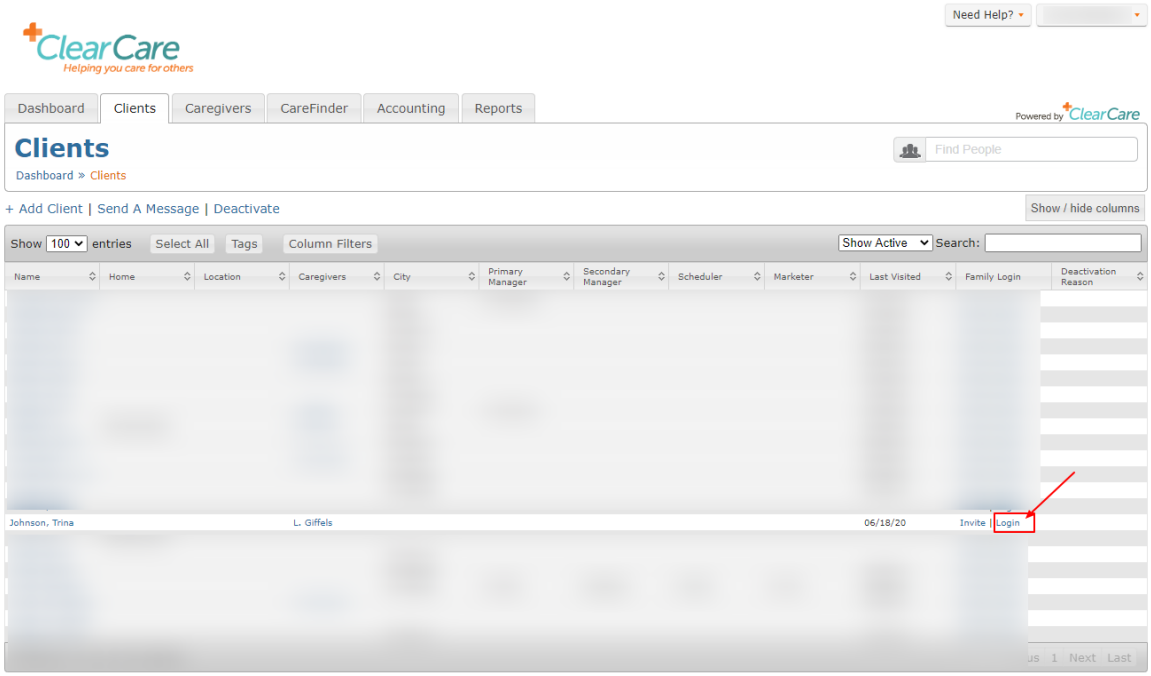
Jun 26, 2020 • FAQ

ARTICLE TEXT

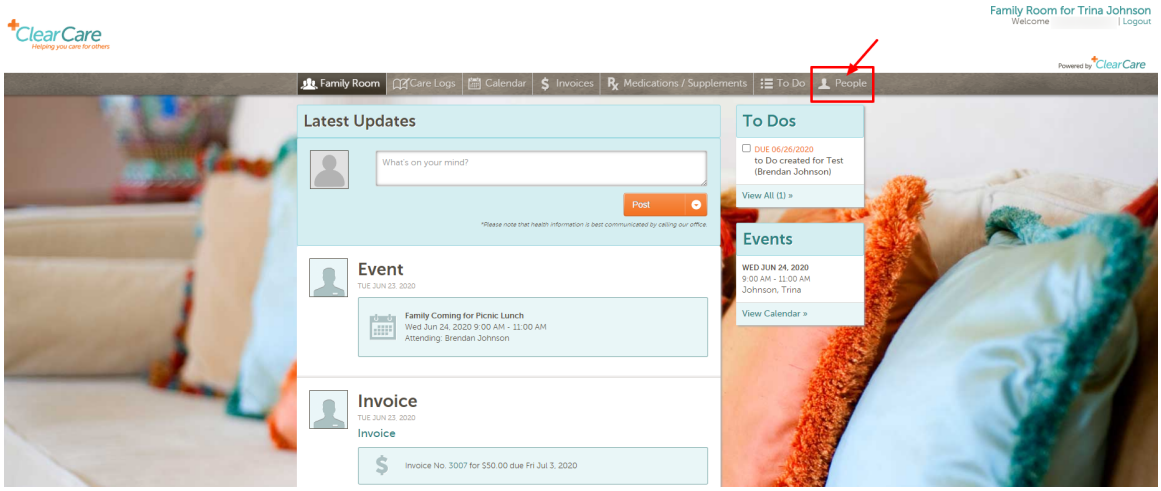
To change which tabs are displayed in the Family Room, navigate to the Family Room Options setting under Agency Settings. For more information about the Family Room options in your Agency Settings see: What do clients/family members see in the Family Room? (https://clearcareonline.force.com/s/article/What-do-Clients-Family-Members-see-in-the-Family-Room)

Within the Family Room, you can select if certain contacts have more or less access than other contacts via the People tab. To change the permissions to the Family Room for a contact/person follow the steps below:

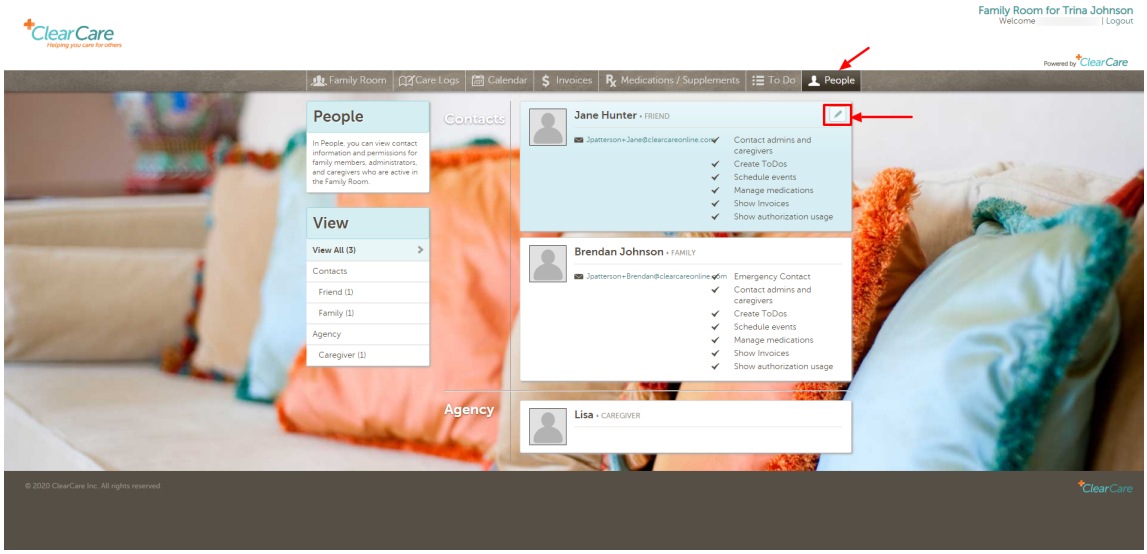
Step 1: Log in the Family Room by clicking "Login" next to that client's name on your main client list.



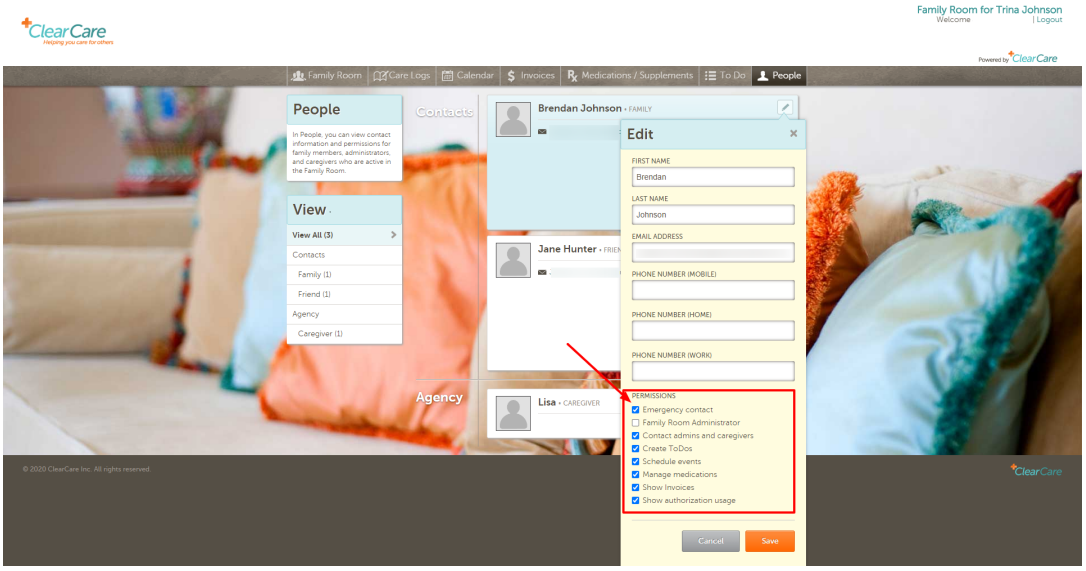
Step 2: The Family Room for the selected client will open. Navigate to the People tab.



Step 3: When you scroll your cursor over the upper right-hand corner of the contact card, the edit/pencil symbol will appear. Edit the contact card by clicking on the pencil symbol.



Step 4: Edit the level of access you want each family room member to have. Check or uncheck permissions. Then save.



Emergency Contact - if the client contact is listed as the emergency contact with the client, then they will be listed as an emergency contact in the Family Room and this box will be checked. When you uncheck the box in the Family Room, the contact will no longer be listed as an emergency contact for the client in ClearCare

Family Room Administrator - The contact has the ability to manage Family Room permission levels for the other client contacts via the 'People' tab

Contact Admins and Caregivers - The contact will see caregiver and staff assignment names in the People tab. On the person's contact card they can view the permission options that have been assigned to that person. For more information about assigning staff to a client please see: How do I assign staff to specific clients? (https://clearcareonline.force.com/s/article/How-Do-I-Assign-Staff-to-Specific-Clients)

Create To Dos - The contact has access to add or edit a To Do item in the family room. If the option is not checked the person can only view To Dos created in the family room.

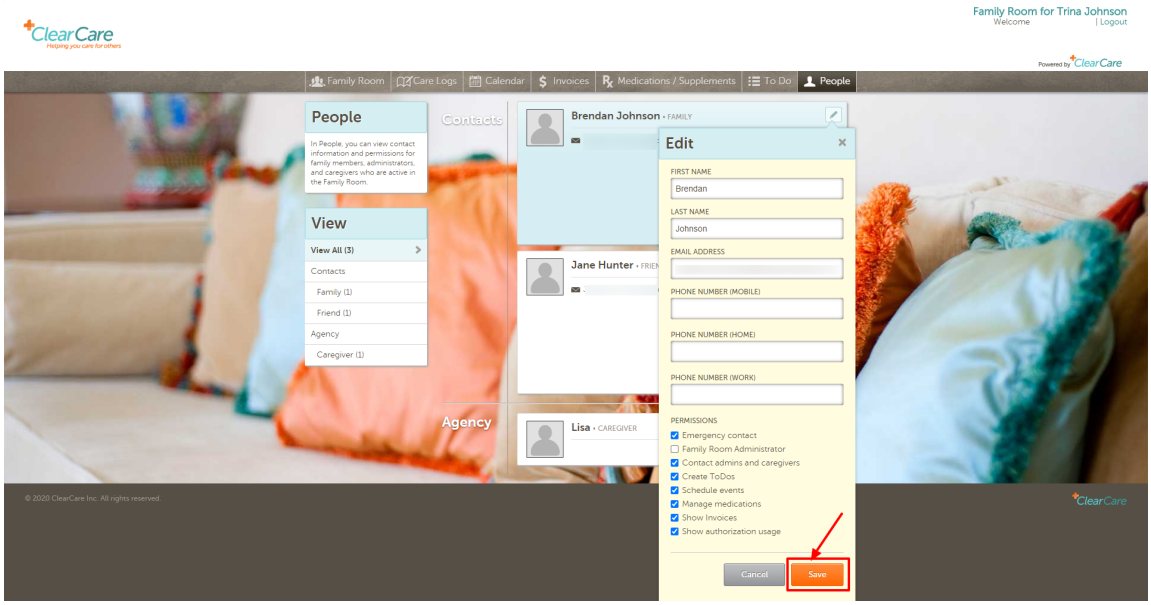
Schedule Events - When this option is checked the contact can add events to the Family Calendar.

Manage Medications - When this option is checked the contact has the ability to view and add medications. Existing medications cannot be edited.

Show Invoices - When this option is checked then the contact can view the client's invoices

Show authorization usage - If this option is checked, and the "Option to Display Usage in the Family room" has been selected on the client's authorization then the contact will see the usage for the authorization in the ClearCare calendar in the family room. For more information about adding or setting up an Authorization see How do I add an authorization? (https://clearcareonline.force.com/s/article/How-do-I-add-an-authorization)

Step 5: Once you have made the appropriate permission selections for the person, click Save.



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