Permissions in Cloud and What They Mean

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Permissions in Cloud and What They Mean



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Each area of the Permissions section provides you with two options: **Read Only** or **Edit**. These are controlled by simple tick boxes:

- **Read Only Access**
  Tick the **Read Only** box if you want the user to be able to view the information but not make any changes. This is useful if you want them to have visibility without the risk of accidental edits or updates.
- **Edit Access**
  Tick the **Edit** box if you want the user to be able to both view and make changes. This gives them full control over that area, so they can update, amend, or remove information as needed.
- **No Access**
  If you do not want the user to have any access at all—neither to view nor to edit—then simply leave both boxes unticked. This will completely restrict their access to that area.

Use the search bar on the right to find the specific area you would like to understand.

Admin

Common Options

Add New Resident	Add New Resident	Allows the user to add new Resident
Care Plan Integrity Checks	Care Plan Integrity Checks	Allows the user to access Care Plan Integrity Checks which displays missing areas of Care Plans for each Service User
Alerts and Notifications	Alerts and Notifications	Allows the user to add, remove, or edit alerts
Administer Messages	Administer Messages	Allows the user to view messages sent by all staff and see read status
Add New Service User	Add New Service User	Allows the user to add a new Service User
Add New Member of Staff	Staff File Integrity Checks	Displays missing areas of Staff Profiles
Other Areas	Incident Analysis	Allows access to Incident Analysis and report generation
Care Planning	Care Plan Integrity Checks	Displays missing Care Plan information per Service User
	Manage Monitoring	Allows monitoring to be added, edited, or removed for Service Users
Communication	Administer Messages	View and manage staff messages
	Document Library	Allows documents to be added or removed for Service Users or Staff

Staff Area

Allocations	Manage Allocations	Allows the user to manage the allocations of tasks that are created in the system and assign them to specific members of staff

Client Area

Resident Management	Residents	Allows the user to access all Resident Information

	Add New Resident	Allows the user to add new Resident
	Record a Death	Allows the user to record the death of a Service User
	Record a Leaver	Allows the user to record when a Service User has left
Add New Resident	Add New Resident	Allows the user to add a new Resident
Other Options	Care Service Groups	Allows the user to add, remove, or edit Care Service Groups (useful for multiple units or floors)
	QR Code Management	Allows the user to generate QR codes
Resident Personal Accounts	Personal Allowance	Allows the user to access, add, or amend personal allowances for residents
Day Centres	Day Centres	Allows the user to book residents into the Day Centre and make amendments

Care Planning

Care Plan Integrity Checks	Care Plan Integrity Checks	Allows the user to access Care Plan Integrity Checks which displays missing areas of Care Plans for each Service User
Monitoring and Alerts	Alerts and Notifications	Allows the user to add, remove, or edit monitoring for each individual Service User
	Care Planning Comments	Allows the user to manage dropdown options and comments used by staff when recording care
	Manage Monitoring	Allows the user to add, remove, or edit monitoring for each individual Service User
	Monitoring Defaults	Allows the user to manage default monitoring assigned to Service Users
	Monitoring Types	Allows users to create new monitoring areas (Multi Select Form / SCF)
Alerts and Notifications	Alerts and Notifications	Allows the user to add, remove, or edit alerts
Care Note Analysis	Care Note Analysis	Allows the user to access, search, and export all recorded care notes

Fast Facts Management	Templates	Allows the user to add or edit fast facts for individual Service Users
Care Review Changes	Care Review Changes	Allows access to proposed care review changes to accept, amend, or reject staff suggestions
Care Plan Notes	Short Cut Notes	Allows the user to create shortcut notes for staff when recording notes
Life History & About Me	About Me Configuration	Allows the user to manage questions for the About Me area
	Life History Configuration	Allows the user to manage questions for the Life History area
Risk & Care Review	Care Review Changes	Allows access to proposed care review changes to accept, amend, or reject staff suggestions
	Care Review Domains	Allows the user to add, remove, or edit Care Review Domains
	Generic Risk Assessments	Allows the user to create new risk assessments
Capacity & Consents	Consent Templates	Allows the user to create new consent templates
	Mental Capacity Templates	Allows the user to create new mental capacity templates
Analysis	Care Note Analysis	Allows the user to access, search, and export all recorded care notes
	Care Plan Integrity Checks	Allows the user to access Care Plan Integrity Checks which displays missing areas of Care Plans for each Service User
Fast Facts	Resident Assignment	Allows the user to assign Fast Fact templates to specific Service Users
	Templates	Allows the user to create new Fast Facts templates
Make Amendments	Care Plan Corrections	Allows the user to add, remove, or edit notes created by staff
Cost of Care Analysis	Dependency / Cost of Care	Allows the user to create and amend dependency and cost of care data

Communication

Calendar	Add/Amend Calendar Entries	Allows the user to add/amend/remove calendar entries
	Events	Allows the user to create new events for the calendar
Messages	Administer Messages	Allows the user to view messages that have been sent by all staff and view if read
	Create Messages	Allows the staff member to create a message to send to a group or individual staff member
Administer Messages	Administer Messages	Allows the user to view messages that have been sent by all staff and view if read
Custom Tasks	Custom Tasks	Allows the user to create/amend/remove tasks and assign them to either Service Users or Staff
Document Library	Document Library	Allows the user to add/remove documents to Service Users or Staff
Other Areas	Analyse Quality Survey	Allows the user to access the information completed in the Quality Surveys and export
	Manage Quality Survey	Allows the user to create/remove/amend surveys that can then be assigned to V-book/Service Users/Friends and Family
	Petty Cash	Allows the user to add/remove monies from the Petty Cash
	V-book	Allows the user to access information from the V-book (who is signed in etc)
Other Tasks & Checklists	Checklists Home	Allows the user to access checklist information – Completed/Not Completed
	Custom Tasks	Allows the user to create/amend/remove tasks and assign them to either Service Users or Staff
	Manage Checklists	Allows the user to create checklists, amend existing ones, and create assignments
Meals and Menus	Manage/View Meals	Allows the user to create and view meals for the home

	Manage Menus	Allows the user to create menus (e.g. Summer Menu and Winter Menu)
	View/Print Menus	Allows the user to view the menus they have created and also print
Further Areas	Fundraising	Allows the user to add monies collected by fundraising events
	Complaints	Allows the user to log and view complaints on the system
More Areas	Contacts	Allows the user to access/add/remove/edit contact information
	Document Library	Allows the user to add/remove documents to Service Users or Staff
	Friends and Family	Allows the user to manage/add family members who wish to use the app and what they can see
	Staff Pocket	Allows the user to access Staff Pocket usage, see how many devices have it loaded, and remove/disable
CRM	Room Management	Allows the user to add/edit/remove information about the rooms they have available in the home
	Site Management	Allows the user to add/edit/remove information about the home

Advanced Stuff

Configuration & Set Up	Device Management	Allows the user to access information about who last used a device and provides the ability to deactivate access
	System Settings	Allows the user to access Care Control settings and configure how the system is set up
	Application Administration	Allows the user to access eMAR audits and add or amend stock reasons
User Access	One Time Codes	Allows the user to send one-time codes to staff so they can download apps to their devices
Application Administration (eMAR)	eMAR	Allows the user to create audit settings and sign staff out of drug trolleys

Other Functions

Other Functions	Admin Dashboard	Allows the user to access the Admin Dashboard
	Care Plans	Allows the user to access Care Plans from the Admin page
	Organisational Management	Allows the user to access Organisational Management for Cloud User Settings
	Print Care Plans	Allows the user to print care plan information
	Record Something	Allows the user to record care plan information from the Admin page
	Service Status	Allows the user to access Service Status from the Admin page
	System Usage	Allows the user to see system usage and overall usage percentage

Analysis Reports

Analysis	Analysis Reports	Allows the user to access Analysis Reports from the Admin page

Care Planning

Care Plans

Summary	Summary	Allows the user access to the Summary page in Care Plans
Essentials	About Me	Allows the user access to the About Me section
	Care Notes	Allows the user access to Care Notes in the Care Plan
	Care Review	Allows the user access to the Care Review
	Checklists	Allows the user to see which checklists have been assigned to the Service User
	Consent & Capacity	Allows the user access to the Consents and Mental Capacity area
	Food, Drink & Nutrition	Allows the user access to the Food, Drink & Nutrition section

	Key Contacts	Allows the user access to Key Contacts for the Service User
	Personal Details	Allows the user access to the Personal Details page
	Risk Assessments	Allows the user access to Risk Assessments in the Service User Care Plan
Medical	eMAR	Allows the user access to the MAR chart
	GP Connect	Allows the user access to GP records if set up in Care Control
	Health Issues	Allows the user access to Health Issues
	History / Diagnosis	Allows the user access to the Service User's medical history
	Medication Creams	Allows the user to add, remove, or edit creams
	Medication Profile	Allows the user to add, remove, or edit medications (pulled from the app if using eMAR)
	Professional Visits	Allows the user to access Professional Visits
Analysis	Incident Analysis	Allows the user to access Incident Analysis
	Monitoring Analysis	Allows the user to access Monitoring Analysis
Other Areas	Activities	Allows the user to access Activities
	Audit of Change	Allows the user to see who has made changes within Care Plans
	Life History	Allows the user to access and amend Life History
	Linked Documents	Allows the user to access and add linked documents from the Care Plan
	Memory Box	Allows the user to access Memory Box items and record new ones
	Personal Belongings	Allows the user to access Personal Belongings and add new items

Care Recording

Record Care Information	Record Care Common	Allows the user to access and record information in the Common options
	Record Care Full	Allows the user to access and record information in all areas

Handover Notes

Handover	Handover	Allows the user to access the Handover notes

Home Status

Service Status	Service Status	Allows the user access to the Service Status in Care Planning

HR

Security

Security	Access all Staff Members	Allows the user to access all staff members

Application Bundle

Advanced	Advanced	Allows the user to access the Advanced tab to manage settings

Staff Details

Personal Details	DBS	Allows the user to access, add, or amend DBS information
	Disciplinary	Allows the user to access, add, or amend disciplinary actions
	Documents	Allows the user to access, add, or amend documents on the staff record
	Notes	Allows the user to access, add, or amend notes against the staff member
	Pandemic	Allows the user to access, add, or amend COVID vaccination information
	Personal Details	Allows the user to access, add, or amend personal details
	Process Leaver	Allows the user to process a staff member as a leaver
	References	Allows the user to access, add, or amend references for the staff member

	Roles and Contracts	Allows the user to access, add, or amend the role and contract for a staff member
	Security	Allows the user to access and amend security access based on the staff member’s role
	Supervisions	Allows the user to access, add, or amend supervisions for the staff member
	Training	Allows the user to access, add, or amend training courses on the staff profile
Role & Contract	Add New Role	Allows the user to add a new role to the staff member
	Edit Role	Allows the user to edit the current role of the staff member
Security	Change PIN	Allows the user to change the PIN number for the staff member
	Edit Security	Allows the user to access and amend security access for the staff member
Notes	Delete Notes	Allows the user to delete any notes made against the staff member

Staff Training

Staff Training	Training Records	Allows the user to access the Staff Training area of HR and add or amend records

Attendance & Holiday

Record Holiday	Record Holiday	Allows the user to record staff holidays
Holiday	Holiday Calendar	Allows the user to access the Holiday Calendar
	Holiday Requests	Allows the user to access and process holiday requests
	Record Holiday	Allows the user to record staff holidays
Absences	Absences	Allows the user to record an absence
	Bradford Factor Analysis	Allows the user to access the Bradford Factor

Holiday Requests	Holiday Requests	Allows the user to process holiday requests
Holiday Calendar	Holiday Calendar	Allows the user to access the Holiday Calendar
Absences	Absences	Allows the user to access and record absences
Bradford Factor Analysis	Bradford Factor Analysis	Allows the user to access the Bradford Factor Analysis

Supervisions

Templates	Supervision Templates	Allows the user to create a supervision template
Action Templates	Supervision Action Templates	Allows the user to create an action template for a supervision
Create Supervision	Create Supervision	Allows the user to assign a supervision to a staff member
Status	Supervision Status	Allows the user to view supervision status to see if they have been completed
Passwords	Supervision Passwords	Allows the user to view or access passwords set by staff when supervision has been assigned

Org Management

General

Organisation Structure	Manage Roles	Allows the user to add, amend, or edit roles for Cloud users
	Structure	Allows the user to access the organisation structure and add or amend services within the organisation
	View Organisation Codes	Allows the user to access site codes for all sites
Access Roles	Access Roles	Allows the user to add or edit access roles, determining which apps and homes users can access
Users	Departments	Allows the user to add or edit departments (e.g. Care, Management)

	Overview	Allows the user to add, remove, or edit users for Cloud access
	Positions	Allows the user to add, remove, or edit positions (e.g. Care Assistant, Registered Manager)
	User Settings	Allows the user to access user settings
Permissions	Permission Management	Allows the user to add, remove, or edit permissions required for Cloud access
	Permission Report	Allows the user to generate a report showing staff permissions
Settings	Applications	Allows the user to enable or disable applications across the organisation
	Settings	Allows the user to manage Cloud user settings (e.g. enabling MFA)
Data	Data Mirroring	Allows the user to copy data such as Care Review Domains and SCF between sites within the organisation

Roster

Overide Alert Options

Alerts to Warnings	Allow Agency to be Used	Allows the user to override the alert when an agency member is being assigned
	Allow Conflicting Shifts to be Created	Allows the user to override the alert that prevents staff being assigned overlapping shifts
	Allow Limits to be Exceeded	Allows the user to override limits set in the Settings section
	Allow Upcoming Leaver Assignment	Allows the user to override alerts when assigning shifts to staff with a leave date
	Allow Visa Hours to be Exceeded	Allows the user to override visa hour restrictions to assign additional hours

General

Rotas	End Rota	Allows the user to end a rota

	Global Settings	Allows the user to access global settings for the roster
	Manage Allocations	Allows the user to access Manage Allocations when creating a rota
	Multi-View	Allows the user to create a multi-view in the dashboard
	Ordering	Allows the user to manage the row order when creating a rota
	Rota Settings	Allows the user to access rota settings
	Rotas	Allows the user access to rotas in general
Edit Plan Mode	Add Roles	Allows the user to add roles when editing the draft plan
	Add Staff	Allows the user to add staff when editing the draft plan
	Edit Rota Plan	Allows the user to edit the draft rota plan
	Publish Plan Changes	Allows the user to publish changes made to the draft plan
	Remove Template	Allows the user to remove shift templates when creating the rota
	Templates	Allows the user to access and create shift templates
Live Rota	Resident Absence	Allows the user to record a resident absence on the live rota
	Add Shift	Allows the user to add shifts on the live rota
	Assign Visits Outside Availability	Allows the user to assign shifts outside staff availability (Dom Roster)
	Delete Shift	Allows the user to delete a shift on the live rota
	Live Rota	Allows the user access to the live rota
	Modify Shift	Allows the user to modify a shift on the live rota
	Shift Audit	Allows the user to access the shift audit on the live rota
	Staff Absence	Allows the user to record a staff absence on the live rota
	Staff Holiday	Allows the user to record a staff holiday on the live rota

	Templates	Allows the user to add, remove, or amend shift templates on the live rota
Agency	Assign Agency Staff	Allows the user to assign shifts to agency staff
	Care Agencies	Allows the user to add, amend, or remove care agency details
	Issues	Allows the user to action issues with agencies
	Usage	Allows the user to access agency usage data
Authorisations	Authorisation Requests	Allows the user to action and authorise roster change requests
Analysis	Check In Analysis	Allows the user to run the Check In Analysis report (Dom Roster)

Consolidated Invoicing

Consolidated Invoicing

Invoicing	Invoicing	Allows the user to add, amend, or remove invoices (Dom Roster only)
	Regenerate Invoices	Allows the user to regenerate invoices (Dom Roster only)
Contracts	Contracts	Allows the user to add, amend, or remove contracts (Dom Roster only)
Owners	Manage Contract Owners	Allows the user to add, amend, or remove contract owners (Dom Roster only)
Residents	Clients	Allows the user to add, amend, or remove clients (Dom Roster only)
Settings	Manage Settings	Allows the user to access overall settings (Dom Roster only)

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- Normal
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Table of Contents

↑ Top