# Users

help.grandcare.com → help for professional care managers → users



## Overview

Users are caregivers who are authorized to log in to the Online Care Portal. Only people with User accounts may log in, use the Care Menu, engage in most communication activities with Residents, view data, and set rules.

It is *not* necessary to have a user account in order to receive rule notifications, or to video chat with the Resident. The User Role assigned to a user's account determines the features and capabilities available to that user, so screens may differ in what's visible, depending on the logged-in user's role.
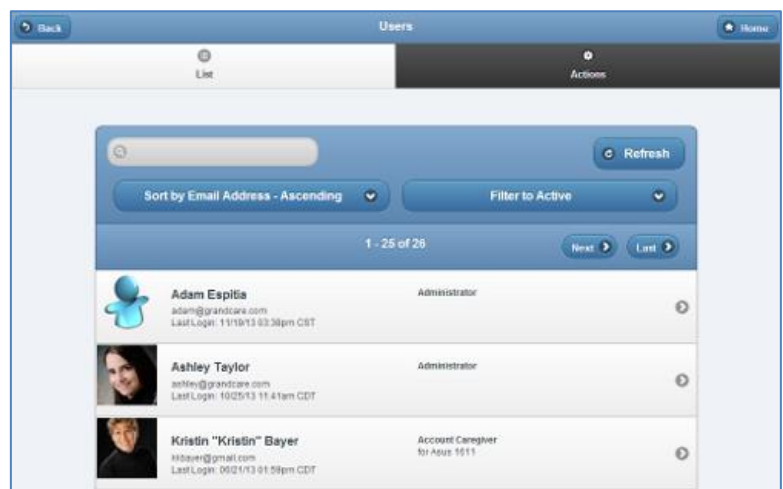


## User Roles

For complete list of User roles and privileges, see the User Roles Definitions page or the User Roles and Privileges Chart. The list of user roles in order of precedence is as follows:

> Admin (highest-level administrator for an entire server)
> Distributor Admin
> Group Admin
> Group Caregiver
> Group Communicator
> Account Admin
> Account Caregiver
> Account Communicator
> Resident Admin
> Resident Caregiver
> Resident Communicator

## Who Can Create a User

Users can only be created by users who are admins at some level. Users can create new users with roles at or below their own level. Specifically:

**Distributor Admins** - can create users with the role of Distributor Admin or below

**Group Admins** - can create users with the role of Group Admin or below

**Account Admins** - can create users with the role of Account Caregiver or below

It is a recommended best practice that each Account have only one Account Admin, so Accounts Admins are not allowed to create users with the role of Account Admin. See your Group Admin if this is necessary for an Account.

**Resident Admins** - can create users with the role of Resident Caregiver or below

This is rare. Typically Accounts have Account-level users rather than Resident-level users.

## Creating a User

- Click the "Manage Users" button on the Dashboard.
- Click the "Actions" tab.
- Click the "Add a new User" button.
- Enter the user's email, which will be used for logging in, and for receiving activation emails.
- Enter the user's first and last name.
    These are required fields.
- Enter the remaining information.
- It is a good idea to upload a picture of the user, which will be displayed with communications received by the Resident.
- Choose the role for the user
    Definitions of each role are available just below the role selection.
    It is a recommended best practice that each user have only one role assigned.
- Click the "Save User" button.

The user's account will not become active until it is activated. When you save the new user, an email is sent to that person with an activation link, which will prompt the user to create a password for his or her login. The activation link must be clicked before it expires. In the event that the link expires, the user can follow the instructions for lost password, to receive a new activation email, or an admin can send a new activation email. (See User Actions below.)

## User Management Operations

Users can be managed by users who are admins at some level. Users can manage other users with roles at or below their own level. Specifically:



> **Distributor Admins** - can manage users with the role of Distributor Admin or below, with roles within the same Distributor
>
> **Group Admins** - can manage users with the role of Group Admin or below, with roles within the same Group
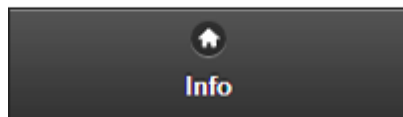>
> **Account Admins** - can manage users with the role of Account Caregiver or below, with roles for the same Account
>
> **Resident Admins** - can manage users with the role of Resident Caregiver or below, with roles for the same Resident
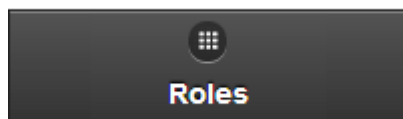
To manage a User:
- Click the "Manage Users" button on the Dashboard.
- Click the User you wish to manage.
- Click the appropriate tab:



**Info Tab** - Click the Info tab to view general information about the User, such as the contact information, and a log of User activity.



**Roles Tab** - Click the Roles tab to see, and manage, the list of the Users who can be managed by the logged-in user.



**Actions Tab** - Click the Actions tab to access the controls for managing a User.

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