

# Users – Getting Started

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## Overview

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- Anyone who is going to log in to monitor activity, upload pictures, update settings, or interact socially with the Resident must be set up as a User.
- Anyone who is going to make or receive Video Chat calls with the Resident, or who should be identified in Caller ID history logs, must be set up as a Phone Person.
- Anyone who is going to receive alerts or send letters to the Resident must be set up as a Caregiver/Contact.



## Users

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In order to log in to the Online Care Portal, and to use the remote Caregiver features of the Resident's system, a person must have a User Account. Users are added in the Online Care Portal by users at the Account Admin, Group Admin or Distributor Admin user level. Once added as users, for your convenience they are automatically added as Caregivers/Contacts in the People module of the Care Menu. The user role assigned to the user determines how many features of the system that user has access to. The system installer should have set up at least one user for the system, and assigned that person to be the Account Admin. This User has sufficient security permissions to add additional Users. (See instructions for adding new users.)

## Phone People

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In order to Video Chat with the Resident, and to appear in the Known Callers List for the Caller ID feature, a person must be set up as a Phone Person. (See instructions for adding Phone People.)

## Caregivers/Contacts

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Users and Caregivers are often one and the same. The primary purpose of Caregivers is to receive alerts from the system, for example a phone call if the door opens in the middle of the night, or a text if medications haven't been accessed at the proper time. People also need to be set up as Caregivers if they are going to send Messages or Letters on the system.

When a User is created, in most cases that person is set up as a Caregiver at the same time, automatically. On occasion there will be a person who will receive rule alerts, but *not* be permitted to log in to the Care Portal. In that rare case, a person must be manually set up as a Caregiver. (See the instructions for adding Caregivers.) In addition, users at the Admin, Distributor Admin, and Group Admin level are *not* automatically set up as Caregivers, and must be set up manually on every account for which they are to receive alerts.

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