User Roles and Permissions

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What are User Roles and how are they different?

Everyone working in your company has a **set user role**, predefined by Carefolk. By defining clear roles, everyone understands what their responsibilities are, ensuring an efficient workflow. **Care Managers** have the **highest level of permissions** with access to all the workings of the company. **Care admins** have more limited access than Managers. While they can manage Caregivers and Clients, they cannot access or change payroll and HR functions.

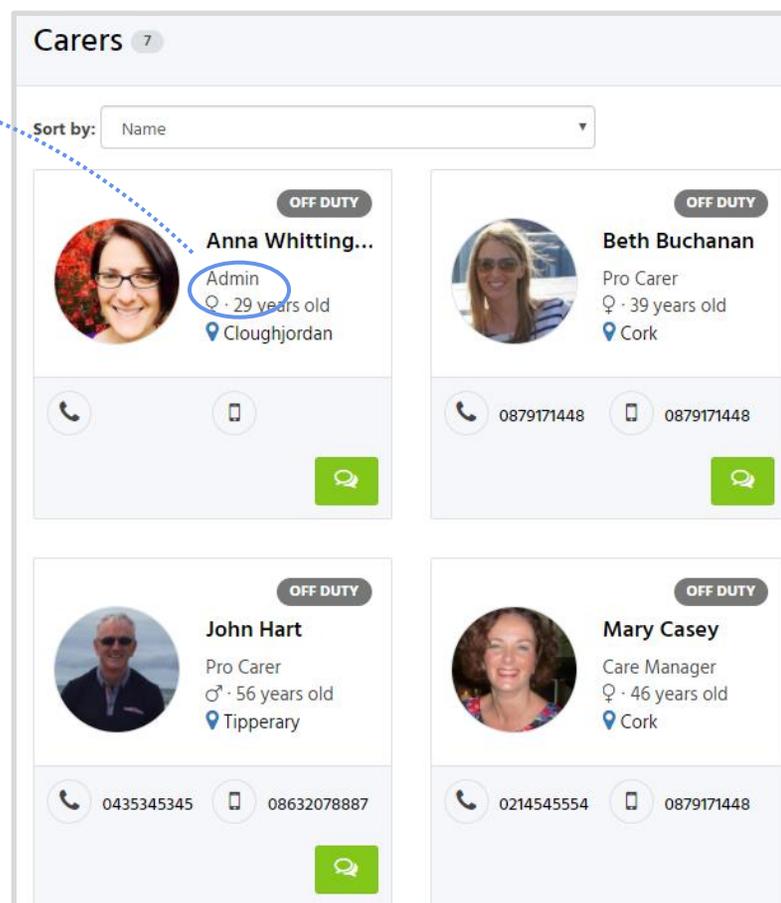Let's look at **the different types of User Roles**

User Roles and Permissions

	Pro Carer	Admin	Manager
Personal Profile	✔	✔	✔
Schedule Client's Visits	✔	✔	✔
Message and Chat	✔	✔	✔
Create Private Notes	✔	✔	✔
Submit Timecards	✔	✔	✔
Approve Timecards		✔	✔
Manage Company Settings		✔	✔
Respond to Company Inquiries		✔	✔
Schedule visits		✔	

Tip: Managers can learn more about accessing and editing the Company settings in **How to set up a Company account**

How can I tell who is in which role?

Role types are immediately visible on **profile cards,** allowing you to easily distunguish between Carers, Managers and Admin. On the **Carers page,** you can also see who has permission to conduct certain tasks. If you need to message them or schedule them for a visit, you can do so direct from their profile.

Note: When a new Carer is recruited to your company, they are added at the Pro Carer level by default.

Change User Roles

Do you need to change someone's role or change their access?

No problem. It is easy to adjust permission levels.

How to Change User Roles

Navigate to the **Carer's Profile** and then the **Profile** section.

Choose **Edit** beside the **Role** section. From the dropdown menu, choose **ProCarer**, **Admin**, or **Manager**.

When finished, select **Save**.

Note: You must be in a **Manager role** to make role changes.

OVERVIEW   PROFILE   SCHEDULE   TIMECARD   NOTES   TRAINING

Profile

General Information: Edit

Gender: Date of birth: Status:
Male   01, June 1961   Active

Availability: Edit

Employment: Hours per day: Available Days:
Full Time   8   Mon, Tue, Wed, Thu, Fri, Sat, Sun

Role: Cancel   Save
⚠ This section is only visible to Care Managers

Pay Level: Role:
Default Pay Level   Pro Carer
                            Select
                            Care Manager
                            Care Admin
                            Pro Carer

Skills: Edit

Careplanning   Dementia Care   End of Life Care