# Staff
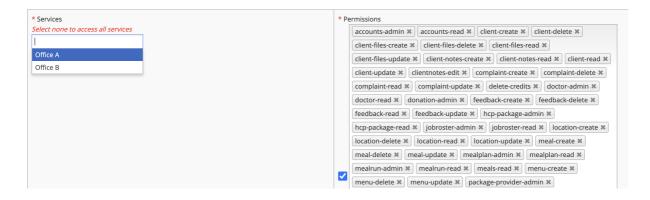
## Add a Staff Member

To add a new **Staff Member** to Polixen, click the **Administration** link in the menu and select **Staff**. Then click the **New User** button.

On the New Staff page, you'll have to give the new staff member a **Username** and **Password**. You'll also need to enter the staff member's **Full Name, Email and Address**. If you have the rest of their information, you can enter it here as well – if not, you can update the details later.



You'll also need to select the services that can access and what are their permissions.
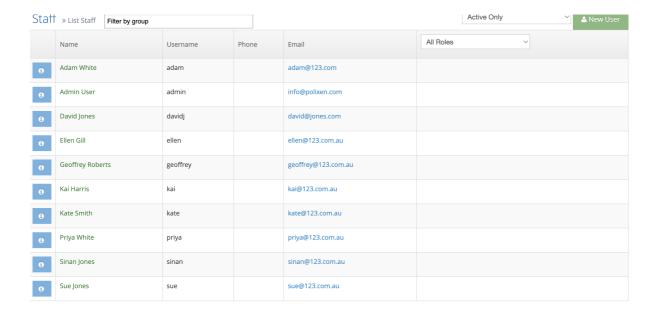
Once you've entered their information, click the **Create New Staff** button at the bottom.
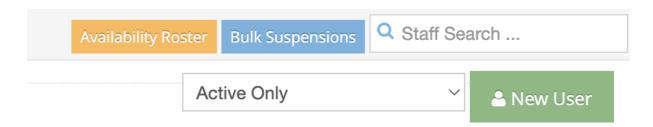


# View and Update Staff

To **View** and **Update** a staff member, click the **Administration** link in the menu and select **Staff**. On the Staff List page, you'll see a list of all the users in your system.
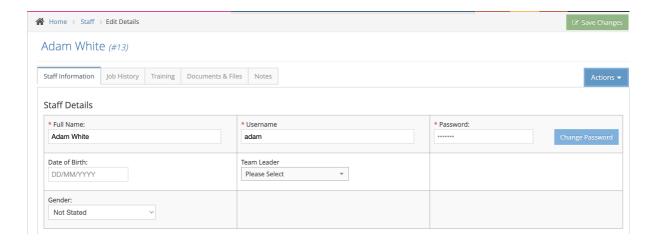
You can search for a particular user, or filter the visible users, by using the **Staff Search Fields** up the top right side. You can use the user's **name** or their **status** (active/inactive) as filters.



To view the details of a particular staff member, click the blue **Information** button next to their name. This will take you to their Staff Page.



On this page, you can update their information. Once you've entered all the information, click the **Save Changes** button to apply your changes.



The other tabs will take you to the staff member's **Files**, **Training Sessions**, **Job History** or **Notes**. There is more information about these features in the **Volunteers** section of the documentation.

## Usernames and Passwords

Every staff member on your Polixen system must have their own unique **username**. They'll use that username plus their secure **password** to log in to the system.

When a staff member wants to change their password, either they can do it themselves (if they have the correct **Permissions** as explained below), or the admin user can do it. To update the password, go to that user's **Staff Page**. Then, fill in a new password and click the **Change Password** button. When the user next logs in, they'll need to use this new password.

# User Privileges

You can specify which users can access which parts of your Polixen system, by setting up their **Permissions**. For example: if a user does not have the **Meals – Create** permission, they will not be able to create new meals on the system.

To update their permissions, just go to a user's Staff Page and update which **Permissions** are listed. Then click the **Save Changes** button to update them.

**Permissions**

▼ Account Permissions

| | |
|---|---|
| **Accounts-admin** | Allows the user to update user accounts |
| **Accounts-read** | Allows the user to access accounts information (either in reports or on the accounts page) |

▼ Client Permissions

| | |
|---|---|
| **Client-create** | Allows the user to create clients |
| **Client-delete** | Allows the user to delete clients |
| **Client-read** | Allows the user to access client accounts/information |
| **Client-update** | Allows the user to update existing clients |

▼ Client Files Permissions

| | |
|---|---|
| **Client-files-create** | Allows the user to upload a client file onto a client's account |
| **Client-files-delete** | Allows the user to delete a client file from a client's account |
| **Client-files-read** | Allows the user to access a client file on a client's account |
| **Client-files-update** | Allows the user to update and archive a client file on a client's account |

▼ Client Note Permissions

| Client-notes-create | Allows the user to create a client note |
|---|---|
| Client-notes-read | Allows the user to access client notes |
| Clientnotes-edit | Allows the user to update/edit a client note |

▼ Complaints Permissions

| Complaint-create | Allows the user to create a complaint |
|---|---|
| Complaint-delete | Allows the user to delete a complaint |
| Complaint-read | Allows the user to read a complaint |
| Complaint-update | Allows the user to read and update a complaint |

▼ Credits Permissions

| Delete-credits | Allows the user to delete credits/payments |
|---|---|

▼ Doctor Permissions

| Doctor-admin | Allows the user to create, update and delete a doctor |
|---|---|
| Doctor-read | Allows the user to access doctors account/information |

▼ Donation Permissions

| Donation-admin | Allows the user to create, update and delete a donation |
|---|---|

▼ Feedback Permissions

| Feedback-create | Allows the user to create feedback |
|---|---|
| Feedback-delete | Allows the user to delete feedback |
| Feedback-read | Allows the user to read feedback |
| Feedback-update | Allows the user to update feedback |

▼ HCP Package Permissions

| Hcp-package-admin | Allows the user to create, update and delete a HCP Package |
|---|---|
| Hcp-package-read | Allows the user to access HCP Package information |

▼ Job Roster Permissions

| Jobroster-admin | Allows the user to create, update and delete a Job |
|---|---|
| Jobroster-read | Allows the user to access Jobs |

▼ Locations Permissions

| | |
|---|---|
| **Location-create** | Allows the user to create locations |
| **Location-delete** | Allows the user to delete locations |
| **Location-read** | Allows the user to read locations |
| **Location-update** | Allows the user to update locations |

▼ Meal Permissions

| | |
|---|---|
| **Meal-create** | Allows the user to create a meal |
| **Meal-delete** | Allows the user to delete a meal |
| **Meal-read** | Allows the user to access Meal information |
| **Meal-update** | Allows the user to update a meal |

▼ Meal Plan Permissions

| | |
|---|---|
| **Mealplan-admin** | Allows the user to create, update and delete a Meal Plan |
| **Mealplan-read** | Allows the user to access Meal Plan information |

▼ Meal Runs Permissions

| | |
|---|---|
| **Mealrun-admin** | Allows the user to create, update and delete a Meal Run |
| **Mealrun-read** | Allows the user to access Meal Run information |

▼ Menu Permissions

| | |
|---|---|
| **Menu-create** | Allows the user to create a Menu |
| **Menu-delete** | Allows the user to delete a Menu |
| **Menu-update** | Allows the user to update a Menu |

▼ Package Provider Permissions

| | |
|---|---|
| **Package-provider-admin** | Allows the user to create, update and delete a Package Provider |
| **Package-provider-read** | Allows the user to access Package Provider information |

▼ Pay Rate Permissions

| | |
|---|---|
| **Pay-rate-admin** | Allows the user to create, update and delete a Pay Rate |

▼ Polixen Setup Permissions

| | |
|---|---|
| **Polixen-setup-admin** | Allows the user to create, update and delete Polixen Setup Related Data |

▼ Role Permissions

| Role-admin | Allows the user to create, update and delete a Role |
|---|---|

▼ Run Roster Permissions

| Runroster-admin | Allows the user to create, update and delete runs in the run roster |
|---|---|
| Runroster-read | Allows the user to access the run roster |

▼ Services Permissions

| Services-read | Allows the user to access Service Information |
|---|---|

▼ Staff Permissions

| Staff-create | Allows the user to create new staff accounts |
|---|---|
| Staff-delete | Allows the user to delete a staff account |
| Staff-read | Allows the user to access staff accounts/information |
| Staff-update | Allows the user to update the staff account/information |

▼ Staff Notes Permissions

| Staff-notes-create | Allows the user to create a new staff note |
|---|---|
| Staff-notes-delete | Allows the user to delete a staff note |
| Staff-notes-read | Allows the user to access staff notes |
| Staff-notes-update | Allows the user to update/edit a staff note |

▼ Stock Permissions

| Stock-admin | Allows the user to create, update and delete stock items |
|---|---|
| Stock-read | Allows the user to access stock information |

▼ Supplier Permissions

| Supplier-admin | Allows the user to create, update and delete a Supplier |
|---|---|

▼ Task Permissions

| Task-admin | Allows the user to perform additional Task related functions |
|---|---|
| Task-create | Allows the user to create a new Task |
| Task-delete | Allows the user to delete a Task |

| | |
|---|---|
| **Task-update** | Allows the user to update a Task |

▼ Trip Permissions

| | |
|---|---|
| **Trip-read** | Allows the user to access trips information |
| **Trip-update** | Allows the user to update trips |

▼ User Group Permissions

| | |
|---|---|
| **Usergroup-admin** | Allows the user to create, update and delete a User Group |

▼ Vehicle Permissions

| | |
|---|---|
| **Vehicle-create** | Allows the user to create a new vehicle |
| **Vehicle-delete** | Allows the user to delete a vehicle |
| **Vehicle-read** | Allows the user to access vehicles information |
| **Vehicle-update** | Allows the user to update a vehicle |

▼ Volunteer Permissions

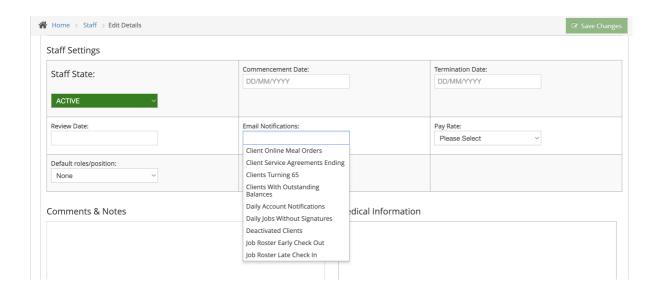| | |
|---|---|
| **Volunteer-create** | Allows the user to create a new volunteer account |
| **Volunteer-delete** | Allows the user to delete a volunteer account |
| **Volunteer-update** | Allows the user to update volunteer accounts/information |

▼ Volunteer Notes Permissions

| | |
|---|---|
| **Volunteer-notes-create** | Allows the user to create a Volunteer Note |
| **Volunteer-notes-delete** | Allows the user to delete a Volunteer Note |
| **Volunteer-notes-read** | Allows the user to access Volunteer Note |
| **Volunteer-notes-update** | Allows the user to update a Volunteer Note |

## <u>User Notifications</u>

You can opt-in to receive email notifications about multiple aspects inside your Polixen system. For example, if you opt into **Daily Account Notifications,** you will receive an email each day that lists all account transactions that happened the previous day.

To update a user's notifications, just go to a user's Staff Page and update which **Email Notifications** are listed. Then click the **Save Changes** button to update them.

## User Notifications

| Aa Notification | ⊙ Frequency | ☰ Description |
|---|---|---|
| Client Note Alerts | Ad hoc | Notifies the user about newly created client notes |
| Client Online Meal Orders | Ad hoc | Notifies the user about updates made to a client's meal plan using the online meal ordering system |
| Client Service Agreements Ending | Weekly | Notifies the user about clients who have service agreements ending in the upcoming month |
| Clients Turning 65 | Weekly | Notifies the user about clients who are turning 65 in the upcoming month |
| Clients With Outstanding Balances | Weekly | Notifies the user about clients who have outstanding balances |
| Daily Account Notifications | Daily | Notifies the user about transactions made in the last day |
| Daily Jobs Without Signatures | Daily | Notifies the user about jobs without signatures done in the last day |
| Deactivated Clients | Daily | Notifies the user about clients that have been automatically deactivated in the last day |
| Job Roster Early Check Out | Ad hoc | Notifies the user about workers who have checked out early from a job |
| Job Roster Late Check In | Ad hoc | Notifies the user about workers who have not checked into jobs that have already started |
| Job Roster Notes Update | Ad hoc | Notifies the user when a job roster note is created or updated in the app |

| Aa Notification | ⊙ Frequency | ≡ Description |
|---|---|---|
| Meal Plan Changes | Ad hoc | Notifies the user about updates made to a client's meal plan |
| NDIS Budgets Expiring | Weekly | Notifies the user about NDIS Budgets that will expire in the upcoming month |
| Outstanding & Upcoming Car Registration Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) car registration expiry dates |
| Outstanding & Upcoming Client Review Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) client review expiry dates |
| Outstanding & Upcoming CTP Insurance Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) CTP insurance expiry dates |
| Outstanding & Upcoming Custom Expiry Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) custom expiry dates |
| Outstanding & Upcoming Drivers License Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) drivers license expiry dates |
| Outstanding & Upcoming First Aid Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) first aid expiry dates |
| Outstanding & Upcoming Police Check Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) police check expiry dates |
| Outstanding & Upcoming Vehicle Insurance Dates | Weekly | Notifies the user about staff and volunteers who have outstanding and upcoming (30 days) vehicle insurance expiry dates |
| System Errors | Ad hoc | Notifies the user about system errors (client address errors, run roster SMS errors, etc) |
| Upcoming Ending Menus | Daily | Notifies the user about menus that will end in the next 30 days |
| Upcoming Tasks | Daily | Notifies the user about tasks with deadlines in the next 7 days |