SYGNAL USER ROLE PERMISSION DOCUMNET FOR ALL WEB MODULES

This document provides a comprehensive overview of the permissions required to access and use all modules in the Sygnal platform. It is intended for system administrators, security professionals, and other users who need to understand how to manage permissions for Sygnal.

Version : 1.2

Updated date: 29/07/2024

Content

Dashboard Module

Prerequisite: To access all the below permission "View Dashboard" permission is required first.

1. Executive Dashboard:

- **Description:** Allows user to see the executive dashboard with approved and unapproved shifts revenue for all subsidiaries/franchise.
- **Scope:** Access revenue insights for approved/Un-approved shifts.
- **Limits:** Requires 'View Dashboard' permission to access. Please note user will be able to access other franchise data if they are assigned to it on user module.

2. Franchise Dashboard:

- **Description:** Allows user to see the franchise dashboard with approved and unapproved shifts revenue of selected subsidiaries/franchise
- **Scope:** View revenue details specific to selected subsidiaries.
- **Limits:** Requires 'View Dashboard' permission to access. Please note user will be able to access other franchise data if they are assigned to it on user module.

3. Item Approval Widgets:

- **Description:** Allows user to see widgets like incomplete RFI forms, pending HR documents, and signatures.
- **Scope:** Access widgets displaying pending approvals and document statuses.
- **Limits:** No ability to modify or approve items directly. Please note user will be able to access the data if they are assigned to it on user module.

4. View Dashboard:

- **Description:** This permission enables the Dashboard menu option.
- **Scope:** Access the Dashboard module for overview and navigation.
- **Limits:** Required to access specific dashboard functionalities.

Client Module

Prerequisite: To access all of the permissions listed below, user must first have the "Client View," and either "View All Client or View all in Subsidiary," permission first.

1. Add Client File:

- **Description:** This permission allows user to add client file like prescription or medical documents, under file tab.
- **Scope:** User can upload client documents in these formats: .pdf, .jpeg, .png, .jpg
- **Limits:** First requires 'View Client File' permission to access Add File option.

2. Add Shift Notes:

- **Description:** This permission allows to add new client/shift notes. These shift notes can help the staff to get additional info regarding shift/client.
- **Scope:** Document and manage client/shift specific notes.
- **Limits:** No ability to modify or delete existing client/shift notes.

3. Allow User to Manage Client Location:

- **Description:** This permission allows user to add or edit client locations under the location tab. These locations can be used while creating a roster for the client.
- **Scope:** Manage and update client location details. User can home/office locations.
- **Limits:** Cannot delete client locations once added.

4. Allow User to Retire Client Location:

- **Description:** This permission allows user to retire client locations.
- **Scope:** Mark client locations as retired when no longer in use. No impact on the existing or future shift record, user needs to manually correct it if required.
- **Limits:** Cannot unretire client locations once retired.

5. Client View:

- **Description:** This permission allows user to view the Client Module only.
- **Scope:** This is the first permission user requires to access the client module on the main menu.
- **Limits:** No ability to view and manage client records.

6. Create Adjustments:

- **Description:** This permission allows user to create shift and client billing adjustments. The adjustment impacted value will be reflected under the client transaction overview.
- **Scope:** Manage adjustments for client billing and shift details.
- **Limits:** Cannot delete or modify existing adjustments.

7. Delete Client Notes:

- **Description:** This permission allows user to delete the client/shit notes.
- **Scope:** With this permission user will be able to delete the client/shift notes.
- **Limits:** No ability to create or modify, “View Shift Notes” permission is required to access.

8. Edit Client File:

- **Description**: This permission allows user to edit or delete client files.
- **Scope:** Modify or remove uploaded client documents.
- **Limits:** Only support these file formats: .pdf, .jpeg, .png, .jpg

8. Edit Client Note:

- **Description:** Allows user to only edit the client/shift notes added.
- **Scope:** User can edit the existing Client/shift notes
- **Limits:** Cannot delete or add new notes.

9. Generate CDC Statement:

- **Description:** Enables the CDC statement tab in only aged care client profile and allows user to view/download and generate CDC statement.
- **Scope:** Create and access CDC statements for eligible clients. This CDC statement is provided to client to access their monthly spendings on services and expenses.
- **Limits:** Restricted to aged care clients only.

10. Manage Client:

- **Description:** Allows user to edit client's general information details from the edit screen.
- **Scope:** Modify client basic details and information like name, CDC/NDIS no., DOB etc.
- **Limits:** Cannot delete client records and can not edit subsidy level, supplements and funds.

11. Manage Client Agreement:

- **Description:** Allows user to create physical or digital agreements for clients.
- **Scope:** User can add new or inactivate any exiting agreement. With an active agreement only, a user is eligible to get services.
- **Limits:** Requires 'View Client Agreement' permission to access.

12. Manage Expenses:

- **Description:** Allows user to add, edit, or delete pending expenses for clients.
- **Scope:** Manage client related expenses. User can add all the expenses done for the client like food, medicine etc.
- **Limits:** Requires 'View Expenses' permission to access.

13. Manage Self Debtor:

- **Description:** Enable create/add debtor option in Billing Configuration tab in client profile and allows user to create/add or inactivate debtors (agency and individual) for all types of clients.
- **Scope:** Manage debtor records for clients. With an active debtor only a client can be added to rostering.
- **Limits:** Cannot create shared billing contacts.

14. Retire Client Agreement:

- **Description:** Allows user to inactive client agreements. This can impact the current and future shifts as for client a active agreement is required to get services.
- **Scope:** Mark client agreements as inactive.
- **Limits:** Requires 'View Client Agreement' and 'Manage Client Agreement' permissions to access.

15. View Adjustments:

- **Description:** Enables the Adjustment tab in client profile and allows user to only view all shift/client billing adjustments done for clients.
- **Scope:** Access details of adjustments made to client billing and shift details. These adjustments will be reflected on client overview tab also.
- **Limits:** Cannot add or delete adjustments.

16. View All Clients:

- **Description:** Allows user to view all subsidiary client records.
- **Scope:** Access a comprehensive list of all client records for all subsidiaries.
- **Limits:** Cannot modify client records.

17. View All in Subsidiaries:

- **Description:** Allows user to view only those client records which are mapped to the logged in user assigned subsidiary.
- **Scope:** Access client records specific to assigned subsidiaries.
- **Limits:** Cannot modify or delete client records and cannot see other subsidiary clients

18. View Client Agreement:

- **Description:** Enables the Agreement tab in client profile and allows user to view/download all physical and digital agreements.
- **Scope:** Access a comprehensive list of client agreements.
- **Limits:** Cannot edit or modify agreement details.

19. View Client as Case Manager:

- **Description:** Allows logged in user to view all client records on the grid list as a case manager.
- **Scope:** Access all the clients for which logged in user is assigned as a case manager.
- **Limits:** Cannot see client for which logged in user is not a case manager, even if they are from the same subsidiary.

20. View Client File:

- **Description:** Enable the File tab in client profile and allows user to view and download all client files added.
- **Scope:** Access all uploaded client documents.
- **Limits:** Cannot edit or delete client files.

21. View Expenses:

- **Description:** Enables Expenses tab in client profile and displays the expenses list view.
- **Scope:** Access expense records for clients.
- **Limits:** Cannot view details, edit or delete expense records.

22. View Shift Notes:

- **Description:** Enables the Notes tab on client profile and allows user to view only all shift notes added for clients.
- **Scope:** Access all shift specific notes for clients.
- **Limits:** Cannot edit or delete shift notes.

23. View Client Alerts:

- **Description:** Enables the Settings tab in client profile and allows logged in user to view only the client alerts.
- **Scope:** Access all the existing alerts added by the user.
- **Limits:** Cannot add/modify or delete the alerts.

24. View Favorite Services:

- **Description:** Enables the Settings tab in client profile and allows logged in user to view only the favorite services, such as favorite price line items.
- **Scope:** Access favorite service price line items and utilizations details.
- **Limits:** Cannot add/modify or delete favorite service entries.

25. View Staff Restrictions:

- **Description:** Enables the Settings tab in client profile and allows user to view only the restricted staff list for clients.
- **Scope:** Access staff restriction details.
- **Limits:** Cannot add/modify or delete staff restriction entries.

26. Manager Client Alerts:

- **Description:** This permission allows user to add, edit, or delete the client alerts.
- **Scope:** User can add alerts for clients, which can be accessed by the staff, with permission.
- **Limits:** Alerts can not be marked as temp inactive.

27. Manage Favorite Services:

- **Description:** Allows user to add, edit, or retire favorite price line items for clients. These added price line item are displayed under favorite line-item tab while selecting line item in roster creation
- **Scope:** Manage price line-item rates and utilizations hours with this permission.
- **Limits:** Cannot delete or modify the price line items rates.

26. Manage Staff Restrictions:

- **Description:** Allows user to add, edit, or delete staff restrictions. But user can still allocate the restricted staff to the client.
- **Scope:** Manage restricted staff list under with this permission
- **Limits:** Cannot delete or modify the restricted staff details.

Price List Module

1. Manage Aged Care Price List:

- **Description:** Allows user to create or edit an aged care price line item. Updated rates will be applicable to the current and future shifts.
- **Scope:** Create new price line items for aged care services.
  Edit existing price line items including rates and descriptions.
- **Limits:** Limited to managing price lists specific to aged care services.
  Cannot retire or unretire a line item.

2. Manage NDIS Price List:

- **Description:** Allows user to create or edit a NDIS price line item. Updated rates will be applicable to the current and future shifts.
- **Scope:** Create new price line items for NDIS services.
  Edit existing price line items including rates and descriptions.
- **Limits:** Restricted to managing price lists related to NDIS services only.
  Cannot retire or unretire a line item.

3. Manage Other Price List:

- **Description:** Allows user to create or edit other price line items. Updated rates will be applicable to the current and future shifts.
- **Scope:** Create new price line items for other client type services.
  Edit existing price line items including rates and descriptions.
- **Limits:** Specific to managing price lists not categorized under aged care or NDIS.
  Cannot retire or unretire a line item.

4. Manage iCare Price List:

- **Description:** Allows user to create or edit an iCare price line item. Updated rates will be applicable to the current and future shifts.
- **Scope:** Create new price line items for iCare services.
  Edit existing price line items including rates and descriptions.
- **Limits:** Limited to managing price lists specific to iCare services.
  Cannot retire or unretire a line item.

5. Manage Subsidy Management:

- **Description:** Allows user to manage rates, effective dates, and expiry dates of Subsidy and supplements for aged care clients.
- **Scope:** Adjust subsidy rates and supplements based on regulatory changes or business requirement. Set effective and expiry dates for subsidy adjustments.
- **Limits:** Limited to managing subsidies and supplements within the context of aged care clients.

6. NDIS Price List Upload:

- **Description:** Enables the option to upload NDIS price list and allows user to upload a new NDIS price list using a prescribed template available for download on the same screen.
- **Scope:** Upload price lists for NDIS services in bulk or individually.
  Ensure data accuracy and compliance with NDIS pricing guidelines.
- **Limits:** Restricted to uploading price lists specifically formatted for NDIS services. Cannot upload price lists for other client types.

7. Retire Aged Care Price List:

- **Description:** Allows user to retire aged care price line items. This will impact the finance section of current and future shifts where the line item is used.
- **Scope:** Retire outdated or no longer applicable price line items for aged care services.
- **Limits:** Specific to retiring aged care price line items only.
  Cannot unretire and retired price line item.

8. Retire NDIS Price List:

- **Description:** Allows user to retire NDIS price line items. This will impact the finance section of current and future shifts where the line item is used.
- **Scope:** Retire outdated or no longer applicable price line items for NDIS services.
- **Limits:** Specific to retiring NDIS price line items only.
  Cannot unretire and retired price line item.

9. Retire Other Price List:

- **Description**: Allows user to retire other price line items. This will impact the finance section of current and future shifts where the line item is used.
- **Scope:** Retire outdated or no longer applicable price line items for categories other than aged care or NDIS.
- **Limits:** Specific to retiring price line items not categorized under aged care or NDIS.
  Cannot unretire and retired price line item.

10. Retire iCare Price List:

- **Description:** Allows user to retire iCare price line items. This will impact the finance section of current and future shifts where the line item is used.
- **Scope:** Retire outdated or no longer applicable price line items for iCare services.
- **Limits:** Specific to retiring iCare price line items only.
  Cannot unretire and retired price line item.

11. View Aged Care Price List:

- **Description:** Enables the Aged Care price list menu option and allows user to view only the Aged Care Price list.
- **Scope:** Access read only information related to aged care price lists.
- **Limits:** Limited to viewing details within the aged care price list.
  Cannot edit or manage price lists or other types of service lists.

12. View NDIS Price List:

- **Description:** Enables the NDIS price list menu option and allows user to view only the NDIS price list.
- **Scope:** Access read only information related to NDIS price lists.
- **Limits:** Limited to viewing details within the NDIS price list.
  Cannot edit or manage price lists or other types of service lists.

13. View Other Price List:

- **Description:** Enables the Other price list menu option and allows user to view only other price lists.
- **Scope:** Access read only information related to price lists not categorized under aged care or NDIS.
- **Limits:** Limited to viewing details within other price lists.
  Cannot edit or manage price lists for aged care, NDIS, or iCare services.

14. View iCare Price List:

- **Description:** Enables the iCare price list menu option and allows user to view only the iCare price list.
- **Scope:** Access read only information related to iCare price lists.
- **Limits:** Limited to viewing details within the iCare price list.
  Cannot edit or manage price lists for other types of service lists.

15. View Subsidy Management:

- **Description:** Enables the Subsidy Management menu option and allows user to view Subsidy & Supplements rates and expiry dates.
- **Scope:** Access read only information related to subsidy rates and supplements for aged care clients.
- **Limits:** Limited to viewing subsidy details within the context of aged care clients. Cannot modify subsidy rates or supplements for other types of services or clients.

Expenses Module

1. Manage Expenses Approvals:

- **Description:** Allows user to manage client expenses by approving, rejecting, and marking them as paid.
- **Scope:** Bulk approve or reject expense submissions. Mark expenses as paid or unpaid.
- **Limits:** Limited to managing client expenses only.

2. View Expenses Approvals:

- **Description:** Enables the Approval module in the menu and allows user to view all expenses created for clients under expense approval submenu.
- **Scope:** Access read only information related to expenses.
- **Limits:** Cannot approve or mark paid any expense.

Employee Module

Prerequisite: To access all the permissions listed below, the user must first have the "Employee List" and either "Team Member Show All Records" or "Team Member Show Only Assigned Subsidiaries".

1. Employee Add:

- **Description:** This permission allows user to add a new team member with additional permission “Manage Team Member”.
- **Scope:** Enter new employee details into the system.
- **Limits:** Cannot add a new employee record without additional permissions.

2. Employee Availability:

- **Description:** Enable the Availability tab in team member profile and allows logged in user to edit and update the availability of team members.
- **Scope:** Manage and update team members' availability for the full day or for some hours.
- **Limits:** Restricted to availability management only.

3. Employee Download:

- **Description:** Enables the download button on the team member list view screen and also enables the "Download History" submenu option in team member module and allows user to download all team members' records for all subsidiaries.
- **Scope:** Export team member data in a downloadable format.
- **Limits:** Can't download specific subsidiary employee list.

4. Employee Item Approval:

- **Description:** Allows user to create or add items like bank accounts, licenses, etc. for team members.
- **Scope:** Manage and update additional items associated with team members.
- **Limits:** Limited to item creation and approval only.

5. Employee Item HR Form Issue:

- **Description:** Allows user to issue HR forms for team members.
- **Scope:** Generate team member HR forms as required.
- **Limits:** Cannot modify HR form templates or contents.

6. Employee List:

- **Description:** Enables the Team Member module in the menu.
- **Scope:** This is the mandatory permission to access the Team member module.
- **Limits:** It's only a module enabling permission, no records will be visible.

7. Employee RFI Form Issue:

- **Description:** Allows user to issue RFI forms for team members.
- **Scope:** Generate and distribute RFI forms as required.
- **Limits:** Cannot modify RFI form templates or contents.

8. Employee Status Change:

- **Description:** Allows user to change the status of team members to Active/Inactive.

- **Scope:** Manage the status changes for team members, this change will reflect on user module also.
- **Limits:** Cannot modify other aspects of team member profiles.

9. Employee Upload:

- **Description:** Enables the upload history submenu option in team member module and allows user to upload team members' records using a prescribed template available on the same screen for download.
- **Scope:** Upload bulk data of team members into the system.
- **Limits:** Data upload restricted to the prescribed template format.

10. Manage Profile Image Approval:

- **Description:** Allows user to view and accept/reject team members' profile images from the HR dashboard.
- **Scope:** Review and manage profile image submissions.
- **Limits:** Cannot edit or modify profile images.

11. Manage Team Member:

- **Description:** Allows user to edit team members' records.
- **Scope:** Modify and update team member details.
- **Limits:** Cannot delete team members or change critical information.

12. Manage Time Off:

- **Description:** Enables the time off tab in team member profile and allows user to delete time off requests applied by team member from mobile app.
- **Scope:** Manage and handle time off requests.
- **Limits:** Cannot approve or modify time off requests.

13. Manage Vendor:

- **Description:** Enables the "Employment Mapping' tab in the team member profile and allows user to manage vendor mapping to a team member, applicable only when the team member's employment type is "Contractor" or "Both".
- **Scope:** Associate vendors with team member subsidiary.
- **Limits:** Multiple vendors can't be mapped to a subsidiary.

14. Team Member Show All Records:

- **Description:** Allows user to view all subsidiary team member records.
- **Scope:** Access all team member records across all subsidiaries.

- **Limits:** Cannot edit or modify team member records.

15. Team Member Show Only Assigned Subsidiaries:

- **Description:** Allows user to view only the team members mapped to the logged in user's assigned subsidiaries.
- **Scope:** Access team member records within designated subsidiaries.
- **Limits:** Cannot view team members from subsidiaries not assigned to the user.

16. Update Loggin Email in Client Management:

- **Description:** Allows user to update the client email address in the client edit screen, additional permission "Manage Client" required to update.
- **Scope:** Login email of the client can be updated and this updated client email will reflect on the User module screen also.
- **Limits:** Cannot view team members from subsidiaries not assigned to the user.

17. Update Team Member Logging Email:

- **Description:** Allows user to update the team member email id, from the team member profile with an additional permission "Manage Team Member". This will impact the user login, password needs to be reset after email update to share new password with team member.
- **Scope:** Login email of the team member can be updated and this updated team member email will reflect on the User module screen also.
- **Limits:** Additional permission required for this permission.

18. View Time Off:

- **Description:** Allows user to only view the time off requested by staff from Sygnal mobile application.
- **Scope:** All the time off requests of a team member are visible to the logged in user.
- **Limits:** Can't add or delete a time off request.

Roster Module

Prerequisite: To access all the permissions listed below, the user must first have the "Roster View by Client" or "Roster View by Resource" permissions first.

1. Manage All Price List:

- **Description:** Allows user to select price line items while creating a roster.
- **Scope:** Choose and apply price line items during roster creation.

- **Limits:** Restricted to selecting from available price lists.

2. Roster View by Client:

- **Description:** Enables the Roster module in the menu and also the two submenu options "Roster View" and "Roster Review Approval" and allows user to view rosters categorized by client names.
- **Scope:** Access rosters organized by client names.
- **Limits:** Cannot edit or modify roster details.

3. Roster View by Resource:

- **Description:** Enables the Roster module in the menu and also the two submenu options "Roster View" and "Roster Review Approval" and allows user to view rosters categorized by resource names.
- **Scope:** Access rosters organized by resource names.
- **Limits:** Cannot edit or modify roster details.

4. Shift Approval:

- **Description:** Allows user to approve pending shifts from the grid list view or detailed shift view.
- **Scope:** Approve all the completed shifts, with bulk approval from grid with payroll tab must approve condition.
- **Limits:** Cannot approve in bulk without payroll approval.

5. Shift Bulk Approval:

- **Description:** Allows users to perform bulk approval of shifts directly from the grid list view, without needing to go to the shift detail view for individual tab approval.
- **Scope:** Bulk approve completed/clocked out shifts efficiently from the grid list view only.
- **Limits:** Cannot bulk approve the amended shifts from the list view.

6. Shift Cancel:

- **Description:** Allows user to cancel shifts at any step before the complete approval step.
- **Scope:** Cancel shifts to adjust scheduling or staffing needs.
- **Limits:** Limited to cancelling shifts in designated stages.

7. Shift Create & Edit:

- **Description:** Allows user to create new shifts and edit existing ones. This requires an additional permission "Shift Publish & Un-Publish" to create/edit a shift.
- **Scope:** New shift can be created for client and staff.
- **Limits:** Can't publish the created shift without additional permission.

8. Shift Delete:

- **Description:** Allows user to delete draft, published, or approved shifts from the calendar view.
- **Scope:** Remove unwanted or obsolete shifts from the system.
- **Limits:** Restricted to deleting shifts based on permissions and status.

9. Shift Publish & Unpublish:

- **Description:** Allows user to publish or unpublish shifts from the calendar view.
- **Scope:** Make shifts visible or hidden based on operational needs.
- **Limits:** Cannot modify shift details like client type, subsidiary, start and end date-time when publishing again.

10. View All Shifts:

- **Description:** Allows user to view all the shifts on the roster review/approval screen page, regardless of logged in user assigned subsidiaries.
- **Scope:** Access comprehensive view of all shifts for review and analysis.
- **Limits:** Requires the additional permissions to work.

11. View Shifts as Shift Manager:

- **Description:** Allows the user to view the subsidiary mapped resources and client lists on the calendar/filter, along with the shifts for these resources/clients where the logged-in user serves as a shift manager.
- **Scope:** Access shifts only in which logged in user is the shift manager.
- **Limits:** Can't see the shift for other shift managers

12. View Shifts as Subsidiary Member:

- **Description:** Allows user to view the logged in user subsidiary mapped resource and client list on the calendar/filter and also the shifts mapped with the same subsidiary as the logged in user.
- **Scope:** Access shifts within the user's designated subsidiary.
- **Limits:** Cannot view shifts from subsidiaries not assigned to the user.

13. View Shifts as Case Manager:

- **Description:** Allows user to View/Create/Approve shifts for clients for which logged in user is mapped as a case manager.
- **Scope:** Access shifts within the user's designated subsidiary.
- **Limits:** Cannot view shifts from subsidiaries not assigned to the user.

Incident Module

1. Incident Add:

- **Description:** Allows user to add a new incident.
- **Scope:** Enter details and create new incident records.
- **Limits:** Cannot modify or delete existing incident records.

2. Incident Header Status Change:

- **Description:** Allows user to update incident status from open to close.
- **Scope:** Change incident status headers as required.
- **Limits:** Limited to updating incident status only.

3. Incident List:

- **Description:** Enable the incident module in the menu and allows user to view only the incidents created by the logged in user only.
- **Scope:** Access the list of all incidents added by logged in user.
- **Limits:** Cannot edit or modify incident details, also can't view incidents added by other users.

4. View All Incidents:

- **Description:** Enables the incident module in the menu and allows user to view all incidents created by all the users.
- **Scope:** Access all incident records for review.
- **Limits:** Cannot edit or modify incident records.

5. View Assigned Incidents by Subsidiaries:

- **Description:** Allows user to view incidents mapped to the same subsidiary as the logged in user.
- **Scope:** Access incidents within designated subsidiaries.
- **Limits:** Cannot view incidents from subsidiaries not assigned to the user.

Form Module

1. Form Add/Edit:

- **Description:** Allows user to add or edit new or existing unpublished forms.
- **Scope:** Create new forms or modify existing form templates. These forms can be mapped to client and team member to gather additional information.
- **Limits:** Cannot delete forms or modify form functionalities beyond initial creation.

2. Form Copy:

- **Description:** Allows user to copy existing forms.
- **Scope:** Duplicate forms for reuse or modification.
- **Limits:** Limited to copying existing forms without altering original templates.

3. Form List View:

- **Description:** Enables the Form module option in the menu and allows user to view only all added forms added by all the users.
- **Scope:** Access a comprehensive list of all the added forms.
- **Limits:** Cannot edit or delete forms from the list view.

4. Form Retire:

- **Description:** Allows user to retire an existing form.
- **Scope:** Mark forms as retired when no longer in use.
- **Limits:** Cannot unretire forms once marked retired.

5. Form Template Create:

- **Description:** Allows user to create templates for existing forms.
- **Scope:** Develop standardized templates for form creation.
- **Limits:** Template creation restricted to initial form setup.

Reports Module

1. Audit Log:

- **Description:** Allows user to view the audit log report.
- **Scope:** Access detailed audit trail of system activities like shift approval, client update, mobile audits.
- **Limits:** Cannot modify audit log entries.

2. Client Expenses:

- **Description:** Allows user to generate and download Client expense reports.
- **Scope:** Generate and download the report for all the client expense added from the client profile.
- **Limits:** Cannot modify expense report data.

3. Debtor/Agency:

- **Description:** Allows user to generate new debtor/agency billing invoice reports to bill clients.
- **Scope:** Create billing invoices for debtors or agencies based on the debtors selected while creating/approving the shift. Client will be billed on bases of this report, it gives a access for service taken by client and their rates.
- **Limits:** Cannot modify billing invoice details.

4. Roster:

- **Description:** Allows user to generate and download roster reports for Resource/Client, this report has three templates standard, NDIS and iCare.
- **Scope:** Access roster reports based on specified templates.
- **Limits:** Cannot modify roster data.

5. Shift:

- **Description:** Allows user to generate/download Shift report.
- **Scope:** View comprehensive shift reports.
- **Limits:** Cannot modify shift data.

6. Shift Scheduled:

- **Description:** Allows user to generate and download shift schedule reports for all client types.

- **Scope:** Access Shift Schedule report with all the scheduled shifts like draft shifts, awaiting acceptance shifts.
- **Limits:** Cannot modify shift schedule details.

7. View Billing:

- **Description:** Allows user to view and download already generated billing reports.
- **Scope:** Access previously generated billing reports.
- **Limits:** Cannot modify billing report contents.

8. View Client Expenses:

- **Description:** Allows user to view and download already generated expense reports.
- **Scope:** Access previously generated expense reports.
- **Limits:** Cannot modify expense report contents.

9. View Debtor/Agency:

- **Description:** Allows user to view and download already generated Debtor/Agency billing invoice reports.
- **Scope:** Access previously generated billing invoice reports.
- **Limits:** Cannot modify billing invoice contents.

10. View Payroll:

- **Description:** Allows user to view and download already generated payroll reports.
- **Scope:** Access previously generated payroll reports, with reports like expense report, sleepover report, time export report in the zip folder.
- **Limits:** Can only view the payroll report.

11. View Roster:

- **Description:** Allows user to view roster reports.
- **Scope:** Access roster reports like roster standard report by Client/Resource with roster data like amount, line items.
- **Limits:** Can only view the roster report.

12. View Shift:

- **Description:** Allows user to only view/download the shift reports.
- **Scope:** Access shift data like client type, client/staff, Kilometers.
- **Limits:** Can only view the shift reports.

13. View Shift Scheduled:

- **Description:** Allows user to only view/download scheduled shift report.
- **Scope:** Access Shift Schedule report with all the scheduled shifts like draft shifts, awaiting acceptance shifts.
- **Limits:** Can only view shift schedule report.

User Module

1. User Edit:

- **Description:** Allows user to edit a user record including first/last name, role, and subsidiary. User can activate/in activate a user with this permission, and once a user is inactivated this can impact the roster and the particular user services.
- **Scope:** Modify user profile details. Updated changes are reflected on the corresponding screens like team member and client.
- **Limits:** Cannot delete or modify user roles beyond assigned permissions.

2. User Password Reset:

- **Description:** Allows user to reset the password for another user. A new password is sent to the registered email.
- **Scope:** Reset passwords for other users as needed.
- **Limits:** Cannot view or access other user passwords.

3. User Profile:

- **Description:** Enables user profile for the logged in user.
- **Scope:** Access and manage personal user profile settings.
- **Limits:** Cannot modify systemwide user settings or permissions.

4. User View:

- **Description:** Allows user to only view all user (Clients & Employees) records in the system.
- **Scope:** Access all user records within the system.
- **Limits:** Cannot edit or modify user records.

4. View all Subsidiaries assigned Users:

- **Description:** Allows users to view all the subsidiary users list on the grid, regardless of logged in user subsidiaries.
- **Scope:** Access a list of all the users in all subsidiaries.

- **Limits:** Can't not modify user details, with this permission.

Role Module

1. Add Roles:

- **Description:** Allows user to create a new role. User will access the application based on the permission assigned to the role.
- **Scope:** Develop new role definitions with associated permissions.
- **Limits:** Cannot modify existing role permissions without additional permissions.

2. Edit Roles:

- **Description:** Allows user to edit existing roles and permissions for those roles. User will access the application based on the updated permissions for the role.
- **Scope:** Modify and update role permissions.
- **Limits:** Cannot delete the exiting roles.

3. View Roles:

- **Description:** Allows user to view all roles added to the system.
- **Scope:** Access a list of all roles within the organization.
- **Limits:** Cannot edit or modify role permissions.

Settings Module

1. Calendar Event Manage:

- **Description:** Allows user to add or delete calendar events such as public holidays.
- **Scope:** Manage organization wide calendar events. This will impact the current and future shifts; user needs to then manually update the shift.
- **Limits:** Cannot modify existing events beyond deletion.

2. Calendar Event View:

- **Description:** Allows user to view organization calendar events such as state or organization holidays.
- **Scope:** Access and view calendar events.
- **Limits:** Cannot modify or delete calendar events.

3. Client Type Create:

- **Description:** Allows user to edit client types and map forms and agreements to client types.
- **Scope:** Manage client type configurations.
- **Limits:** Cannot delete client types or modify critical configurations.

4. Client Type View:

- **Description:** Allows user to view all client types.
- **Scope:** Access a list of all client types.
- **Limits:** Cannot edit or modify client type definitions.

5. Configure Company Settings:

- **Description:** Allows user to configure company settings and CDC statements such as company logo and details, invoice prefix, geo radius, and ABN number.
- **Scope:** Customize organizational settings.
- **Limits:** Cannot modify systemwide configurations beyond assigned settings.

6. Create Custom Levels:

- **Description:** Allows user to create new custom levels.
- **Scope:** Define and implement new custom level structures.
- **Limits:** Cannot delete or modify existing custom levels.

7. Custom Flags Create:

- **Description:** Allows user to create and view custom flags.
- **Scope:** Develop and manage custom flags.
- **Limits:** Cannot delete or modify custom flags once created.

8. Custom Flags Edit:

- **Description:** Allows user to edit custom flags.
- **Scope:** Modify existing custom flags.
- **Limits:** Cannot delete or create new custom flags.

9. Custom Flags View:

- **Description:** Allows user to view all custom flags.
- **Scope:** Access a list of all custom flags.
- **Limits:** Cannot edit or modify custom flags.

10. Debtor List:

- **Description:** Allows user to view all debtor records, including shared, agency, and individual debtors.
- **Scope:** Access comprehensive list of debtor records.
- **Limits:** Cannot create or modify debtor records.

11. Item Create:

    - **Description:** Allows user to create and view items.
    - **Scope:** Develop and manage item entries.
    - **Limits:** Cannot delete or modify items once created.

12. Item Type Create:

- **Description:** Allows user to create item types.
- **Scope:** Develop and manage item type classifications.
- **Limits:** Cannot delete or modify item types.

13. Item Type View:

- **Description:** Allows user to view all item types.
- **Scope:** Access a list of all item types.
- **Limits:** Cannot create or modify item type definitions.

14. Item View:

- **Description:** Allows user to view all items.
- **Scope:** Access a comprehensive list of all items.
- **Limits:** Cannot add or modify item records.

15. Manage Debtor:

- **Description:** Allows user to create shared debtors. This shared debtor can be used for multiple clients.
- **Scope:** Create and manage shared debtor records, these debtors can be added as shared debtors in client profile under billing configuration tab.
- **Limits:** Cannot create or modify other type debtors.

16. Manage Supplier:

- **Description:** Allows user to create new suppliers, added supplier can be used while adding client expense.
- **Scope:** Develop and manage supplier records.
- **Limits:** Cannot delete or modify supplier records beyond assigned permissions.

17. Payroll:

- **Description:** Allows user to generate new payroll in the report's module.
- **Scope:** Create payroll reports like expense report, KM report, time export report.
- **Limits:** Cannot modify payroll report contents.

18. Registration Group Create:

- **Description:** Allows user to create new registration groups.
- **Scope:** Develop and manage registration group configurations.
- **Limits:** Cannot delete or modify registration groups.

19. Registration Group Edit:

- **Description:** Allows user to edit registration groups.
- **Scope:** Modify existing registration group details.
- **Limits:** Cannot delete or create new registration groups.

20. Registration Group View:

- **Description:** Allows user to view all registration groups.
- **Scope:** Access a list of all registration groups.
- **Limits:** Cannot add or modify registration group definitions.

21. Subsidiary Edit:

- **Description:** Allows user to edit existing subsidiaries or add child subsidiaries.
- **Scope:** Manage subsidiary configurations. User can set subsidiary wise Email and SMS notification for incident creation, critical alert and time off alert.
- **Limits:** Cannot delete parent or child subsidiary.

22. Subsidiary View:

- **Description:** Enables the Subsidiary menu option and allows user to only view all subsidiaries.
- **Scope:** Access a list of all subsidiaries.
- **Limits:** Cannot add or modify subsidiaries.

23. View Custom Levels:

- **Description:** Enables the submenu option in Administrator module and allows user to view all custom levels.
- **Scope:** Access a list of all custom levels.
- **Limits:** Cannot add or modify custom level definitions.

24. View Debtor:

- **Description**: Enables the Debtor submenu option in Administrator module.
- **Scope:** User can only see the menu option, requires additional permissions to access data.
- **Limits:** Only enables the menu option, no records display.

25. View Supplier:

- **Description:** Allows user to view all supplier records.
- **Scope:** Access a list of all supplier records.
- **Limits:** Cannot add or modify supplier records.

Mobile Module

1. Hide Availability Module:

- **Description:** Hides the "Availability" feature on the Sygnal mobile application.
- **Scope:** Modify mobile application interface by hiding availability module.
- **Limits:** This permission only works for mobile application.

2. Hide Client Mobile Number:

- **Description:** Hides the client number on shift detail view and all client view screens on the mobile application.
- **Scope:** Enhance mobile application privacy by hiding client contact details.
- **Limits:** Staff will not able to contact the Client

3. Hide Shift Manager Mobile Number:

- **Description:** Hides Shift Manager mobile number from the shift detail view on the Sygnal mobile application.
- **Scope:** Ensure privacy by masking Shift Manager contact details.
- **Limits:** Staff will not be able to contact Shift manager

4. Hide Time Off Module:

- **Description:** Hides the "Time Off" feature on the Sygnal mobile application.
- **Scope:** Modify mobile application interface by hiding time off module.
- **Limits:** Staff will not be able to request time off.

Age Care Finance

1. Manage Age Care Finance:

- **Description:** Allows user to upload finance records for aged care clients using available templates.
- **Scope:** Upload financial data for aged care clients, these uploaded funds will reflect on the client overview and header section in client profile.
- **Limits:** Cannot modify uploaded finance records.

2. View Age Care Finance:

- **Description:** Allows user to view all funds uploaded record entries on the grid.
- **Scope:** Access a list of all uploaded finance entries.
- **Limits:** Cannot edit or modify finance records.