

Hubbe Role Definitions

The Hubbe Role Definitions are brief summaries of the purpose, intended users, and permissions for each role in the data system. Its intent is to aid in determining which roles to assign to which individuals in your organization. It is recommended to review this document thoroughly before assigning any roles within your Hubbe system

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Permissions Overview and CRUD

Hubbe is a multi-layered system that allows the option for users to access the system and oversee different levels of data management. Because of the complex nature of the system and layers of permissions, there is often confusion when it comes to managing permissions, roles, accounts and everything in between. It is helpful to understand a few key terms/concepts prior to attempting to assign roles to any staff members.

Here are a few key concepts/terms to understand prior to assigning roles to individuals in your organization:

- **Record** - A record is a way of organizing and storing data within the system. Think of a record as a virtual “file” that houses relevant information. Such as a *student record* or a *schedule record* or a *DRDP Record*.
- **Staff Record** - a staff record is a *record* in the system that represents an individual who works for your organization such as an employee or consultant. The *staff record* is a virtual “file” for this person that is used to track and manage all of their information. If an individual has a staff record, there is the option to create a *staff account* for them, and assign them *roles* in the system. A user can have a staff record without having a *staff account*.
- **Staff Account** - A staff account is the creation of the ability to login to the Hubbe system. A staff account is always linked to a *staff record* within the system, and the account informs us who is logging into the data system. A user with a staff account can only login to the system if they have also been assigned at least one *Role*. Users with an *account* but no *role* will not be able to log into the data system because the access and *permissions* granted to the user is role-based.
- **Role** - A role is a set of *permissions* granted to a staff member. By assigning one or multiple roles to a staff member, you are granting them a specific set of *permissions*. This affects what they can see/edit within the data system.
- **Permissions** - What the staff member is allowed to do within the confines of the system. The main types of permissions are outlined in the next bullet.
- **CRUD** - “CRUD” Access is the ability to *Create*, *Revise*, *Update*, and *Delete* data for the given fields and functions accessible by a certain role. Many *roles* have complete, targeted, or no CRUD access to records within the system. Because of this, it is important to be intentional about role assignment because of its implications on data integrity.

Different Types of CRUD Access

As mentioned above, CRUD access is the ability for a staff to Create, Revise, Update, or Delete records within the system. However, it is important to note that when it comes to Roles and their respective permissions, it can be more complicated. Roles often have CRUD access to *some* records, but not *others*. Some roles have No CRUD permissions at all, and they can only *view* records within the system. The majority of the roles in the system have *Targeted* CRUD access, meaning they can edit certain records, but not all of the records that they can see.

The 3 groups below are an over-simplified way of thinking about the different types of CRUD access in the system. Further along in this document we will group all roles in the system into one of these 3 categories. Hopefully these groupings will help you better understand the Hubbe roles and the differences between them

Defining a Complete CRUD Access Role

The “Complete CRUD” roles are the highest-permission roles within the system. These users tend to have CRUD access to every record that they can see/access. These roles will always have the word “**Admin**” in the title. The use of the term “Admin” is our way of communicating that the role has comprehensive permissions and can create and revise most of the data for the level the role has been assigned (i.e. site level, session level, etc.). In general, you want to be very selective with who is assigned a Complete CRUD role. These users will be able to make many changes to data and should be properly trained before logging into the system with these comprehensive permissions.

Defining a Targeted CRUD Access Role

The “Targeted CRUD” roles have access to update data within the system for the specific feature their role is meant to manage. As an example, the role of *Agency Attendance Manager* has CRUD access to update and add attendance data for all sessions located in the agency. The roles will have a very diverse naming convention, and the name of the role states the feature the role has CRUD access to. We try to make the naming convention intuitive whenever possible. Most roles in the system fall into this category. Give users targeted CRUD access roles within the system when you wish them to manage the data for specific features. Oftentimes staff will be assigned multiple targeted CRUD access roles depending on their job responsibilities.

Defining a No CRUD Access Role

The “No CRUD” roles are the lowest-permission roles within the system. These users have no CRUD access to the records that they can view. The roles will oftentimes have the word “**Viewer**” in them (but not always). This is our way of communicating that the roles have very low permissions. In general, it is very safe to give users a No CRUD role within the system in terms of blocking ability to change the data. But these roles are powerful in terms of what they can view and download into excel or PDF. You want to make sure that they are intended to view the records that they have the ability to access with their unique role.

Agency Roles

Complete CRUD Roles

Agency Admin

Purpose of Role: To provide unrestricted CRUD access to all records within an agency.

Intended Users: This role was created for individuals who are the main Data Administrators within the agency. It is the highest level of permission within the SIS Hubbe.

Permissions: CRUD access to all records within an agency.

Core Record Access for Agency Admin:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD	X	X	X	X	X	X	X	X	X	X	X	X	X
View Only													
None													

Agency-Wide Site Admin

Purpose of Role: To provide unrestricted CRUD access to all sites and sessions within an agency.

Intended Users: Site Data Administrators and other staff who actively manage and oversee the data for all of the sites within an agency.

Permissions: CRUD access to all records within every site in a given agency. Notable restrictions include view-only access to child schedules and no access to the Parent record.

Core Record Access for Agency-Wide Site Admin:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD		X	X			X				X	X	X	
View Only				X			X*	X					X
None	X				X				X				

*Billing Permission Notes: No Access to the “Manage Billing” menu item. Can download billing statements, and can view the “Manage Payments” grid, but can take no actions.

Targeted CRUD Roles

Agency Attendance Manager

Purpose of Role: To manage enrollment and attendance.

Intended Users: Staff who oversee enrollment and attendance but don't need access to other parts of the system.

Permissions: CRUD access to all records related to attendance and view-only access to other relevant records within the agency.

Core Record Access for Agency Attendance Manager:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD												X	
View Only	X	X	X		X	X					X		X
None				X			X	X	X	X			

Agency Fiscal Admin

Purpose of Role: To manage all agency fiscal data.

Intended Users: Staff who are heavily involved in overseeing and managing all aspects of fiscal-related data.

Permissions: The ability to: run billing, charge fees to families, enter payments, add credits, add discounts to family fee plans, send billing statements to families, view ledgers, and more relating to the family fee system for an agency's enrolled families. View-only access to student attendance data but can download attendance reports.

Core Record Access for Agency Fiscal Admin:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD		X*	X*	X	X	X	X	X					X
View Only									X**		X	X	
None	X									X			

*Site/Session Permission Notes: Partial CRUD on both of these records, only to general site/session information.

**Applications/Waitlist Permission Notes: Can view Enrollment Dashboard and "All Subsidized Certifications" pages but nothing else. Can NOT view that Applications and Waitlist grid.

Billing Manager

Purpose of Role: To manage family fees and billing.

Intended Users: Staff heavily involved in fiscal/billing.

Permissions: Targeted CRUD access to the family fee fiscal system. Specifically, fee generation and statement posting. This role can run billing, make fee adjustments, waive fees, post fees, view and/or send billing statements to families, and access several fiscal reports. This role cannot manage payments and has limited view-access to the family information.

Core Record Access for Billing Manager:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD							X						
View Only	X			X		X						X	X
None		X	X		X			X	X	X	X		

Education Specialist

Purpose of Role: To manage agency staff data, coach logs, QIPs, and assist with internal agency training

Intended Users: Staff who oversee other staff within an agency

Permissions: Targeted CRUD access to create coach logs, QIPs, ERS and CLASS assessments, and manage child-level data across all agency sites and sessions, including DRDPs, meal counts, and attendance.

Core Record Access for Education Specialist:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules	Coach Logs/QIPS
CRUD			X*			X				X	X	X		X
View Only		X			X								X	
None	X			X			X	X	X					

*Session Permission Note: Can create a Session, but not update or delete. All else is View Only.

Family Caseworker

Purpose of Role: To manage family files caseload to them with a focus on family engagement and program participation

Intended Users: Staff who work with groups of families through their enrollment in a program

Permissions: Targeted CRUD access to parent, child, and child-level data to allow these staff to view certain family information. Family Caseworkers can document family service activities, child case notes, and complete child-level assessments for children in their family caseload.

Core Record Access for Family Caseworker:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD					X					X			
View Only				X*		X						X	X
None	X	X	X				X	X	X		X		

*Family Permissions Notes: Targeted CRUD only for the families, parents, and children that have been caseloaded to them. Can create Family Case Notes, add Emergency Contacts/Authorized Pickups, and download Family Documents.

Family Services Supervisor

Purpose of Role: To manage Family Caseworker caseloads and oversee Family Caseworker data files

Intended Users: Staff who manage or supervise a group of Family Caseworkers and manage data across all families that are caseload to individual caseworkers

Permissions: Targeted CRUD access to the Family Caseworkers assignment/case loading grid. These staff also have the same access at the family, parent, and child level as Family Caseworkers so that they can manage and oversee the family data files of each caseworker.

Core Record Access for Family Services Supervisor:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD					X					X			
View Only	X	X	X	X*		X						X	X
None							X	X	X		X		

*Family Permissions: Targeted CRUD can create Family Case Notes, add Emergency Contacts/Authorized Pickups, Family Service Activities, and download Family Documents.

Intake & Eligibility Coordinator

Purpose of Role: To manage family applications.

Intended Users: Staff members that actively manage family applications.

Permissions: Access to the features for determining eligibility and intaking new families/children into the program. CRUD access to Applications and Waitlist grid.

Core Record Access for Intake & Eligibility Coordinator:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD				X	X	X			X				X
View Only	X	X	X							X	X	X	
None							X	X					

Home Visitor

Purpose of Role: To conduct home visits and issue referrals for parents and children.

Intended Users: Home Visitors.

Permissions: For the families that have been caseloaded to them, CRUD access to the family, parent, and student records. Notably, creating referrals. Additionally, can create Home Visit Logs for the families on their caseload. Can also manage the families Program Assignments/Schedules.

Core Record Access for Home Visitor:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD				X*	X*	X*				X			
View Only													
None	X	X	X				X	X	X		X	X	X

*Family/Student/Parent Permission Notes: CRUD only for the families and parents and children that have been caseloaded to them.

Home Visit Supervisor

Purpose of Role: To oversee their assigned Home Visitors, and caseload families to them.

Intended Users: Any staff directly overseeing home visit staff.

Permissions: Can caseload families to Home Visitors. Additionally, CRUD access to all family, parent, and student records in the system that participate in a Home Visiting Program. Can also manage the families Program Assignments/Schedules.

Core Record Access for Home Visit Supervisor:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD				X	X	X				X			
View Only													
None	X	X	X				X	X	X		X	X	X

Home Visit Manager

Purpose of Role: To oversee the Home Visiting program in its entirety.

Intended Users: Directors and Managers of the Home Visiting program.

Permissions: Can caseload Home Visitors to Home Visit Supervisors. Can also caseload families to Home Visitors. CRUD access to the agency record, and the family, parent, and child records. Can also manage the families Program Assignments/Schedules.

Core Record Access for Home Visit Manager:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD	X			X	X	X				X			
View Only													
None		X	X				X	X	X		X	X	X

Payments Manager

Purpose of Role: To oversee parent payments.

Intended Users: Any staff members involved in managing payments with parents.

Permissions: Targeted CRUD access to the family fee fiscal system in Hubbe —the payment management part. Can make payments on behalf of parents, enter payment records, reconcile payments, allocate payments, void payments, and more regarding payments. Can view and/or send billing statements to families, and access several fiscal reports.

Core Record Access for Payments Manager:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD	X				X			X					
View Only				X		X	X					X	X
None		X	X						X	X	X		

No CRUD Roles

Agency ASQ and Referral Contact

Purpose of Role: To oversee and manage ASQ and referral information across the system.

Intended Users: Staff responsible for ensuring ASQ-3's are being administered to all children the program and referrals are made for those children who show concern on the ASQ-3.

Permissions: Can View all data within an Agency, but has no CRUD access. Can still download reports.

Core Record Access for Agency ASQ and Referral Contact:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only	X	X	X	X	X	X	X	X	X	X	X	X	X
None													

Agency Data Reporting Contact

Purpose of Role: To identify/flag the individual that the county/QRIS staff can contact regarding agency data questions.

Intended Users: Anyone that meets the purpose of the role.

Permissions: Can View all data within an Agency, but has no CRUD access.

Core Record Access for Agency Data Reporting Contact:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only	X	X	X	X	X	X	X	X	X	X	X	X	X
None													

Agency Executive Director

Purpose of Role: To grant someone a title in the system without granting them any actual permissions.

Intended Users: High-level agency individuals who do not need permissions to change system data.

Permissions: Cannot view any agency data, can only view their own staff record and make minor changes.

Core Record Access for Agency Executive Director:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Agency Fiscal Contact

Purpose of Role: To provide a staff view only access to records related to QRIS funding.

Intended Users: Lead fiscal contact within an agency.

Permissions: View only access to all agency data.

Core Record Access for Agency Fiscal Contact:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only	X	X	X	X	X	X	X	X	X	X	X	X	X
None													

Agency Program Director

Purpose of Role: To grant someone a title in the system without granting them any actual permissions.

Intended Users: High-level agency individuals who do not need permissions to change system data.

Permissions: Cannot view any agency data, can only view their own staff record and make minor changes.

Core Record Access for Agency Program Director:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Agency Viewer

Purpose of Role: To provide a staff permission to view all data within an agency.

Intended Users: Users that need to observe agency data without the need to edit anything.

Permissions: Can View all data within an Agency, but has no CRUD access. Can still download reports.

Core Record Access for Agency Viewer:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only	X	X	X	X	X	X	X	X	X	X	X	X	X
None													

Agency Web Service

Purpose of Role: To grant someone access to Hubbe's API library using JSON web API requests

Intended Users: Anyone that meets the purpose of the role.

Permissions: Access to Hubbe's API library using JSON web API request. No access to the actual Hubbe site.

Core Record Access for Agency Web Service:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Parent Educator

Purpose of Role: To manage parent education workshops for the agency.

Intended Users: Anyone that meets the purpose of the role.

Permissions: Complete CRUD access to parent education workshops/records. Cannot access any agency or family data.

Core Record Access for Parent Educator:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Parent Education Child Care Provider

Purpose of Role: To manage data related to child care provided during parent education events

Intended Users: Staff who provide child care during parent education events for agencies to track data on those staff, including their involvement in QIP action steps for an agency.

Permissions: Targeted CRUD access to their own staff record and limited access to ERS and CLASS assessments.

Core Record Access for Parent Education Child Care Provider:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Site Roles

Complete CRUD Roles

There are no Complete CRUD Roles at the Site level.

Targeted CRUD Roles

Site Admin

Purpose of Role: To provide CRUD access to the majority of records within a site.

Intended Users: Site Data Administrators, or whoever actively manages and oversees the data for a site.

Permissions: CRUD access to most records within a site. Notable restrictions include view-only access to child schedules and no access to the Parent record.

Core Record Access for Site Admin:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD						X				X	X	X	
View Only		X	X	X			X*	X					X
None	X				X				X				

*Billing Permission Notes: No Access to the “Manage Billing” menu item. Can download billing statements, and can view the “Manage Payments” grid, but can take no actions.

No CRUD Roles

Site Applications and Waitlist Viewer

Purpose of Role: To oversee family applications that are Waitlisted or Submitted.

Intended Users: Staff that needs to know the status of family applications.

Permissions: View only access to the family applications that are in the "Waitlist" and "Submitted Applications" tabs. No CRUD permissions within the application management grid.

Core Record Access for Site Applications and Waitlist Viewer:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only									X				
None	X	X	X	X	X	X	X	X		X	X	X	X

Site Contract Contact

Purpose of Role: To flag an individual as a title for the person to contact regarding a county/consortia's contract.

Intended Users: Anyone that meets the purpose of the role.

Permissions: Cannot access any Hubbe data at all. No CRUD permissions.

Core Record Access for Site Contract Contact:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Site Rating Contact

Purpose of Role: To identify the individual from the Site to contact related to Site Ratings.

Intended Users: Staff members actively involved in overseeing the Site Rating process.

Permissions: View only access to the non-expired Site Rating scores for their Site.

Core Record Access for Site Rating Contact:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Site Scheduler

Purpose of Role: To flag a contact person for scheduling ERS & CLASS assessments at a given site.

Intended Users: Individuals who should be contacted for assessment questions within a site. This individual's name, phone number, and email address automatically populate in the ERS and CLASS management grid.

Permissions: View only access to all site and session data and partial access to family information.

Core Record Access for Site Scheduler:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only		X	X	X		X				X	X	X	X
None	X				X		X	X	X				

Site Supervisor

Purpose of Role: To flag an individual as the Site's Supervisor

Intended Users: A Site Supervisor, with the intention of having no CRUD within the system.

Permissions: Targeted CRUD on their own staff record, cannot see any site data.

Core Record Access for Site Supervisor:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Site Viewer

Purpose of Role: To give an individual view only access to all site data.

Intended Users: An individual identified by the agency that needs to view, but not edit, data related to a given site

Permissions: View only access to all site and session data and partial access to family information.

Core Record Access for Site Viewer:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only		X	X	X		X				X	X	X	X
None	X				X		X	X	X				

CDF Wizard

Purpose of Role: To complete the CDF report data for their site location at an agency

Intended Users: Staff who are tasked with entering CDF data for their site location that participates in their local Quality Rating and Improvement System (QRIS) program.

Permissions: Targeted CRUD access to a dedicated landing page for submitting site and session-level data based on the assigned site location.

Core Record Access for CDF Wizard:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only	X	X	X										
None				X	X	X	X	X	X	X	X	X	X

Session/Classroom Roles

Complete CRUD Roles

Session Admin

Purpose of Role: To provide unrestricted CRUD access to data within a session.

Intended Users: Lead Teachers, or whoever actively manages and oversees classroom and child information.

Permissions: CRUD access to most data within a session. Notably, session information, attendance, assessments and meal counts.

Core Record Access for Session Admin:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD			X							X	X	X	
View Only						X							
None	X	X		X	X		X	X	X				X

Targeted CRUD Roles

Attendance Manager

Purpose of Role: To manage/take attendance for a session/classroom.

Intended Users: Users involved in attendance but nothing else.

Permissions: CRUD access to all attendance data, but cannot view assessments, messaging, or health data.

Core Record Access for Attendance Manager:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD												X	
View Only			X			X							
None	X	X		X	X		X	X	X	X	X		X

No CRUD Roles

Instructional Assistant

Purpose of Role: To identify classroom assistants but grant no system permissions.

Intended Users: Support staff or aids for a session.

Permissions: CRUD access to their own staff record and nothing else.

Core Record Access for Instructional Assistant:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Lead Teacher

Purpose of Role: To identify a lead teacher for a session but grant no system permissions.

Intended Users: Lead Teachers.

Permissions: CRUD access to their own staff record and nothing else.

Core Record Access for Lead Teacher:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X

Session Viewer

Purpose of Role: To provide view only access to all data within a session record.

Intended Users: Anyone that meets the purpose of the role.

Permissions: View only access to data within a session record. No CRUD permissions.

Core Record Access for Session Viewer:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only			X			X				X		X	
None	X	X		X	X		X	X	X		X		X

Teacher

Purpose of Role: To identify a teacher for a session but grant no system permissions.

Intended Users: Teachers that are not Lead Teachers or Instructional Assistants.

Permissions: CRUD access to their own staff record and nothing else.

Core Record Access for Teacher:

Access Type	Agency	Site	Session	Family	Parent	Child	Billing	Payments	Applications/ Waitlist	DRDPs	Meal Counts	Child Attendance	Child Schedules
CRUD													
View Only													
None	X	X	X	X	X	X	X	X	X	X	X	X	X