User Roles Dashboard

Purpose

Explain what each Phone Copilot user role can access, when to use each role, and how to choose the correct role when creating a new user.

Overview

It is an AI Phone Copilot for front office teams. Users sign in to a dashboard where access is controlled by roles. There are three roles:

- **Admin**
- **Front Desk**
- **Staff**

Each role controls what the user can see and do in the product.

Role Comparison at a Glance

Capability	Admin	Front Desk	Staff
View all phone calls in the Call Work List	Yes	Yes	No (only assigned)
View SMS/text messages	Yes, all	Yes, all	No (only assigned)
See resolved calls list	Yes	Yes	Yes
Change organization settings	Yes	No	No
Configure Co-pilot settings and workflows	Yes	No	No
Manage on-call schedules	Yes	No	No
Access analytics and reporting	Yes	No	No

> In this guide, “calls” includes both phone calls and SMS text conversations.

Role Details

Admin

Best for: Practice owners, operations leaders, and trusted IT leads.

What they can see:

Everything. All calls, all text messages, all resolved calls, and the full Admin portal.

What they can do from the Admin portal:

- Change organization settings
- Configure Co-pilot settings
- Create and update workflows
- Manage on-call schedules
- Access analytics and reporting
- Perform other administrative tasks

When to assign:

Assign Admin only to a small group that must control settings, compliance, and reporting across the entire organization.

Front Desk

Best for: Receptionists and front office coordinators who handle day-to-day communications.

What they can see:

- Call Work List with **every** call, whether assigned to them, assigned to someone else, or unassigned
- All text messages
- Resolved calls list

What they can do:

Work through inbound and outbound tasks, triage unassigned items, and keep the queue clean. They do not have access to Admin portal features.

When to assign:

Assign Front Desk to team members responsible for monitoring all patient communications and distributing work.

Staff

Best for: Individual providers and team members who should only see their own workload.

What they can see:

- Only calls and SMS that are **assigned to them**
- Resolved calls list

What they can do:

Respond to and close out their assigned items. They do not see items assigned to others and do not have access to Admin features.

When to assign:

Assign Staff to clinicians and specialists who should focus on their own tasks without exposure to the full queue.

How to Choose the Right Role When Creating a User

Use this quick decision guide during user creation:

1. **Does this person need to change settings or view organization-wide reports?**
   - Yes → **Admin**
   - No → Go to step 2
2. **Should this person see and manage the entire communications queue for the practice?**
   - Yes → **Front Desk**
   - No → Go to step 3
3. **Should this person only see items assigned to them?**
   - Yes → **Staff**
   - No → Reassess responsibilities. Most non-admin users should be Front Desk or Staff.

Typical Assignments

- **Practice Manager or Owner:** Admin
- **Lead Receptionist:** Front Desk
- **Reception Team Member:** Front Desk
- **Doctor, Nurse, or Provider:** Staff
- **Contractor or Temp Provider:** Staff

Changing Roles Later

Only an Admin should change a user’s role. If responsibilities change, update the role from the Admin portal in the user management area. Changes take effect on the next login or page refresh.

Security and Privacy Notes

- Follow least-privilege access. Give the lowest role that still lets the person do the job.
- Keep Admin access limited and reviewed on a regular schedule.
- Remove or downgrade access when staff leave a team or change responsibilities.

Tips and Good Practices

- Start new users as **Staff** unless they clearly need broader access.
- Keep the number of **Admin** users small and documented.
- Use **Front Desk** for anyone who must watch and work the full queue throughout the day.
- Review user roles monthly or during staff changes.
- Encourage Staff users to close or hand off items quickly so Front Desk can maintain a clean Call Work List.
- Periodically check the resolved calls list to ensure quality and correct routing.

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