

Getting Started – Managed Accounts

In order to set up a managed account you **first need to create your own MyLiferaft** account.

A ‘managed account’ is one that you set up on behalf of someone else. This could be your child, a relative or someone you are caring for and who cannot or does not want to manage their account by themselves.

You will become the manager of this account and be responsible for adding, editing and inviting others to view the information.

You may be invited to take over management of someone else’s account. If you accept their invitation, their account will become one of your managed accounts.

After you log in you have the option to “Add someone else”. You can do this at any time. You can also add Managed Accounts directly from “Your Account Area” once you log in and access your account.

- [Add new Managed Account \(for someone who has an email address\)](#)
- [Change what your Managed User can do within their account \(Permissions\)](#)
- [Add new Managed Account \(for someone without email address\)](#)
- [Accessing Managed Users Account](#)
- [Working within your Managed user’s account](#)
- [Paying for a managed user](#)
- [Transferring Management of a Managed user to another user.](#)
- [Transferring Management back to the managed user \(account owner\)](#)

Set Up a Managed Account

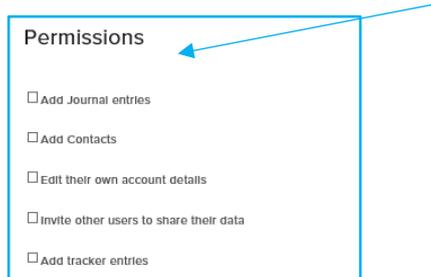


Add

Click on the **someone else** icon.

Adding a new Managed Account (for someone who has an email address)

1. Fill in the details for the person whose account you are setting up
2. Add a personal message which will be included in the email they receive.
3. Select what you would like them to be able to do themselves, you can leave all blank if you wish.
4. When ready click on **Save New Account** (top left of screen).



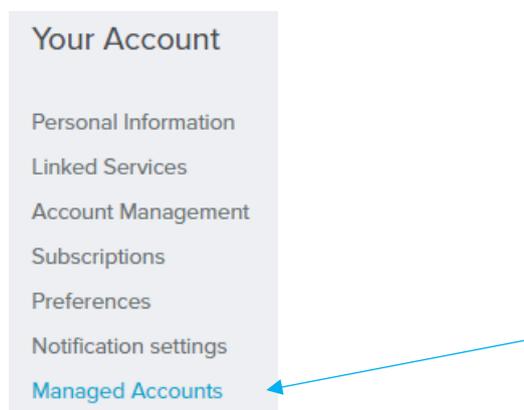
The account holder will be notified by email that you have set up an account for them and will let them know how they can access the account themselves. You can change these permissions at any time.

Adding a new Managed Account (for someone without email address)

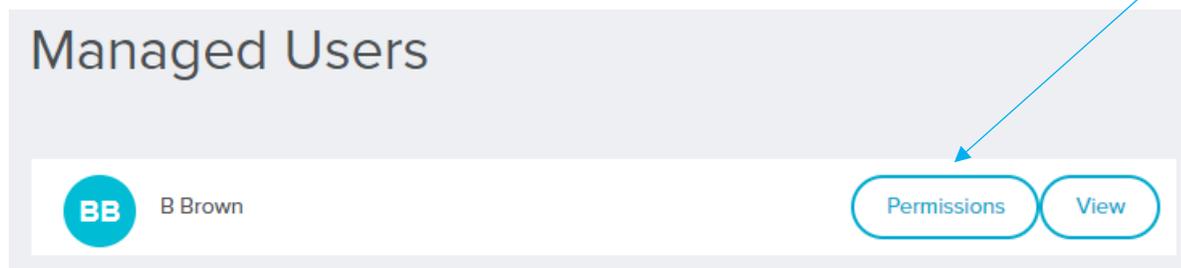
Click on Add someone else and fill in the details for the person whose account you are setting up, you can leave the email address blank then click on **Save new Account**. Without an email the account holder won't receive notifications or be able to interact with their account.

Changing Permissions for Managed User

1. Access **Your** Account and from the selection screen by clicking on , and from your Dashboard access Your Account area. Select Managed accounts.



2. Select Permissions



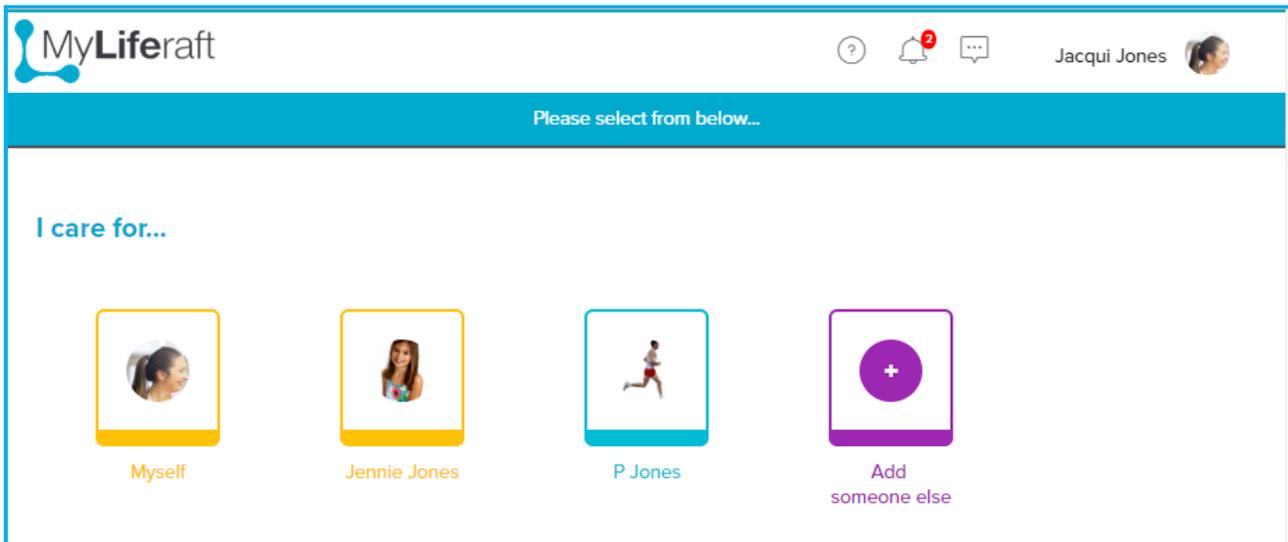
3. Tick those activities you want your managed User to be able to do for themselves within their account.

Accessing a Managed Users Account

There are 3 ways to access a managed user's account.

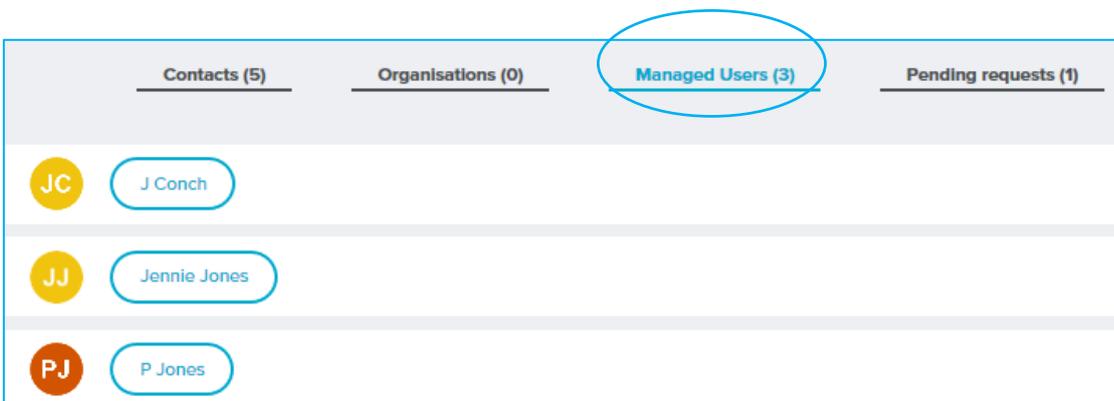
1. From the selection screen..shown below

You access accounts by clicking on the relevant tiles. Click on "Myself" to access **your** account or on the name of the person whose account you want to access. Once you have clicked on their name you will be taken to their dashboard from where you can then navigate within their account and add/edit information on their behalf.



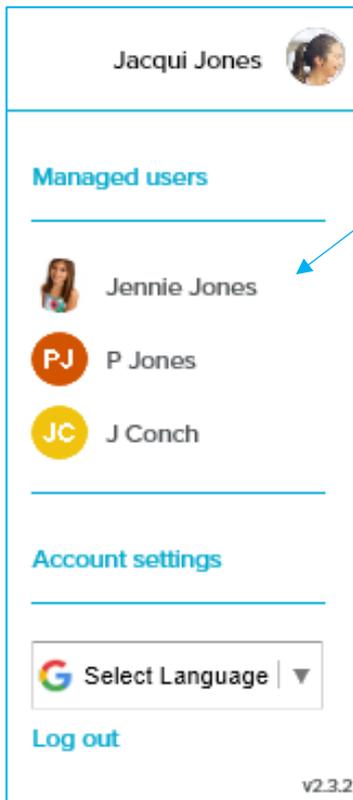
2. From your contacts page, "Managed users" tab

Clicking on their name will take you to their account.



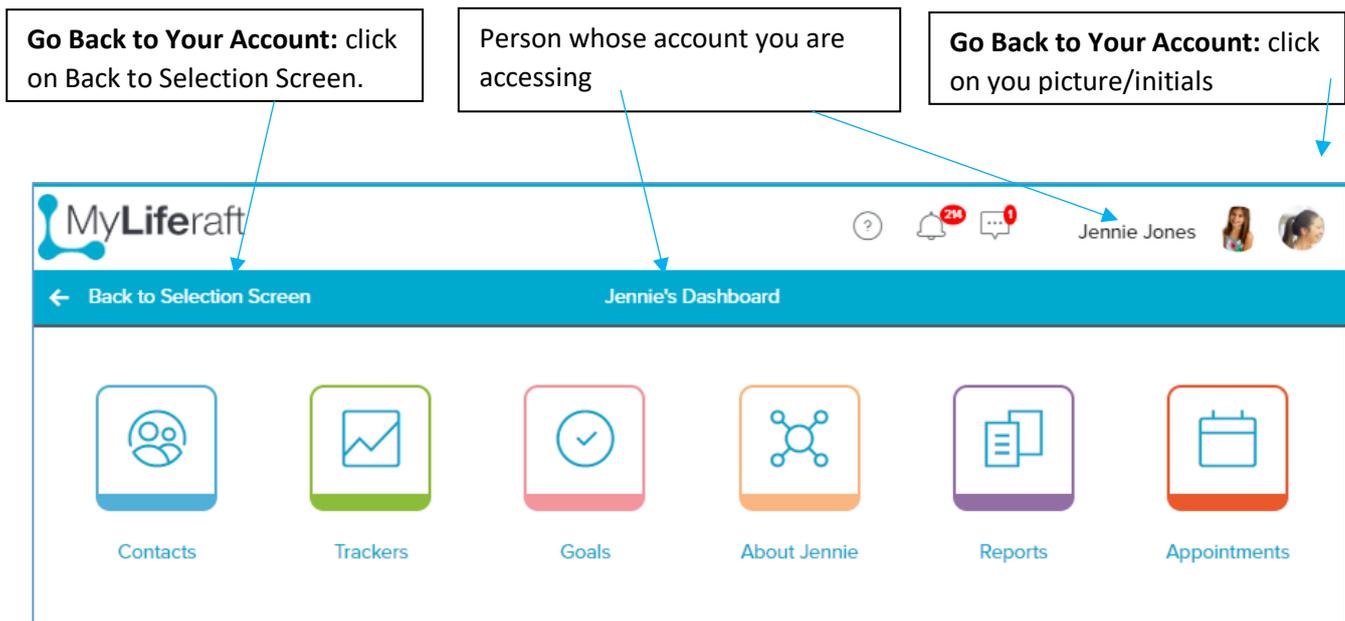
3. From “Your account” area, drop down menu

Click on your name in the top right of the screen and all your managed users will be listed. Click on their name to access their account.



Working within your Managed users account

When you are in a Managed Users account you will see their name next to yours on the top right of your screen and the dashboard and all information **is now that of the managed account NOT your own.**



Paying for a managed user

A Managed user's account will be set up as a FREE Account. The limitations on this are set out on the [subscription page](https://www.myliferaft.com/more/subs/) of the website <https://www.myliferaft.com/more/subs/> but you can upgrade their account at any time.

- **You can pay for them.**

You do this from the subscription area of **your account** where they will be listed as available to pay for. You do this by clicking on the "GO PREMIUM" option and following the instructions.

- **Someone who is viewing their account can pay for them**

If someone else is paying for one of your Managed Users you have the option to take over payment at any time by clicking on "Take Over Payment"

Transferring Management of a Managed user to another user.

To transfer the management of one of your managed accounts to another person you must **access the account area of their Account** and select Account Management. The option to transfer management is at the bottom of the page. You can only transfer management to someone to whom they are sharing. The option to cancel the request to transfer becomes available after a transfer request.

Transferring Management back to the managed user (account owner)

You can pass control of a Managed Account back to the account owner by **accessing the account area of their Account**, then selecting Account Management and scroll to the end of the page. After transferring management you will no longer be able to add/edit or share their information with others; however they can invite you to see their information, this will be mandatory if you are also paying for their account.

