

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 or another person 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.

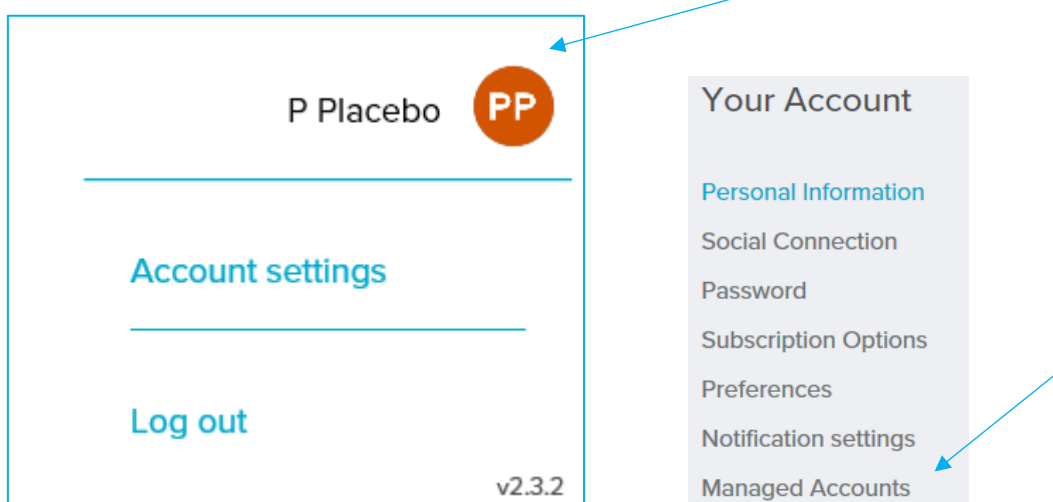
You may be invited to take over management of someone else’s account. If you accept their invitation, their account will become one of your managed accounts.

At first Log in you can add and link an account for someone you care for. You can also add Managed Accounts directly from Your Account Area once you log in to 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 \(account owner\)](#)

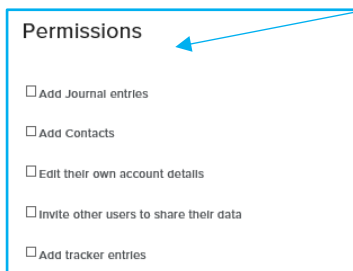
Set Up a Managed Account

Click on the My Account icon from the dashboard or Access your account area by clicking on your name, select account settings from the drop down menu and then click on managed accounts.



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

1. Fill in the managed account holder's details.
2. Add a personal message which will be included in the email they receive.
3. Select what permissions they can have within their account.
4. When ready click on **create new managed user**.

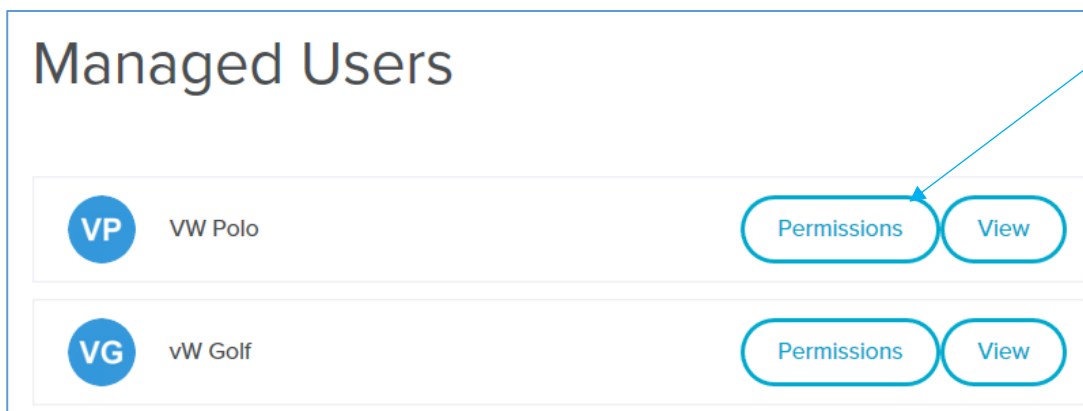


The account holder will be notified by email that you have set up an account for them.

Changing Permissions for Managed User

1. Access **Your** Account area and 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.

You **cannot** change permissions for a managed account from your contacts page



Add new Managed Account (for someone without email address)

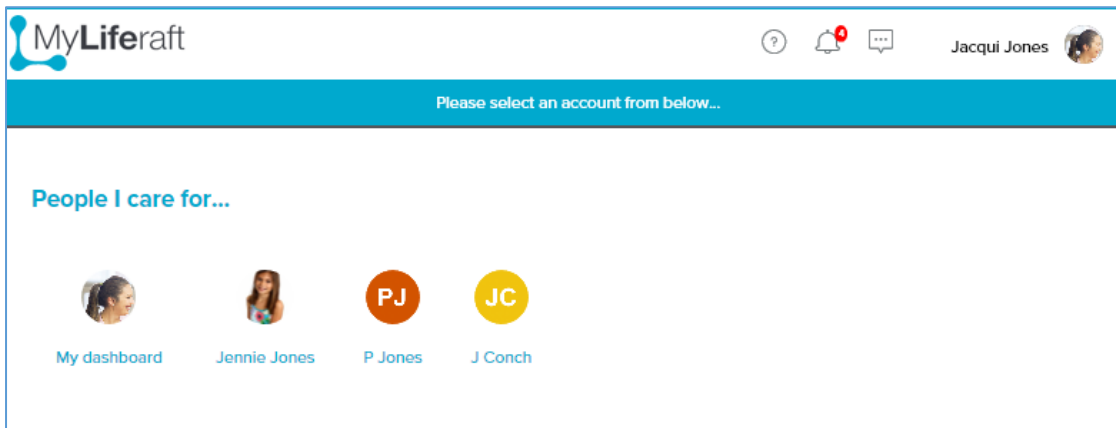
Fill in the managed account holders details and click on **create new managed user**. Without an email the account holder won't receive notification or be able to interact with their account.

Accessing Managed Users Account

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

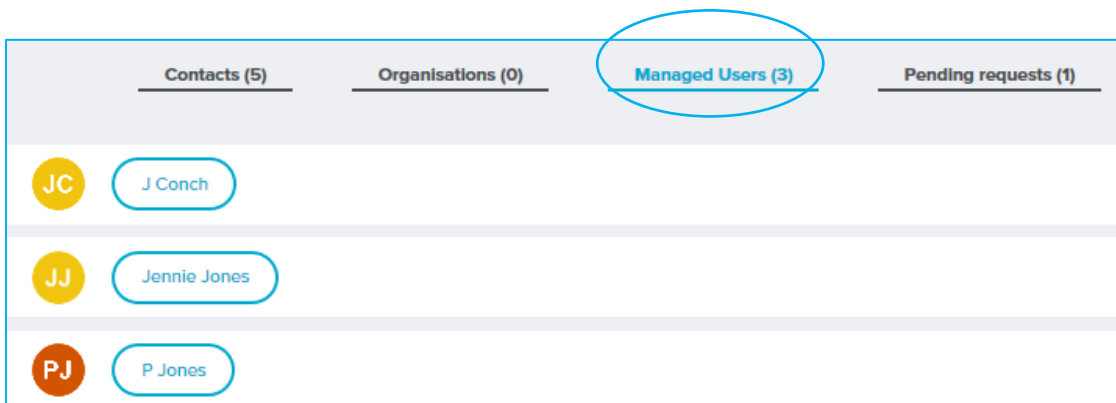
1. From the selection screen

All managed users will be listed on the selection screen when you log in to your account. Just click on their name and you will be taken to their account. You can then navigate within their account and add/edit information on their behalf.



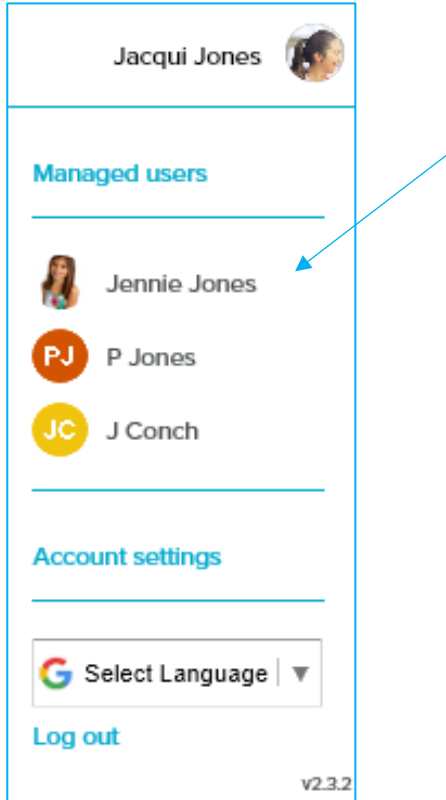
2. From your contacts page, managed users tab

Clicking on their name will take you to their account.



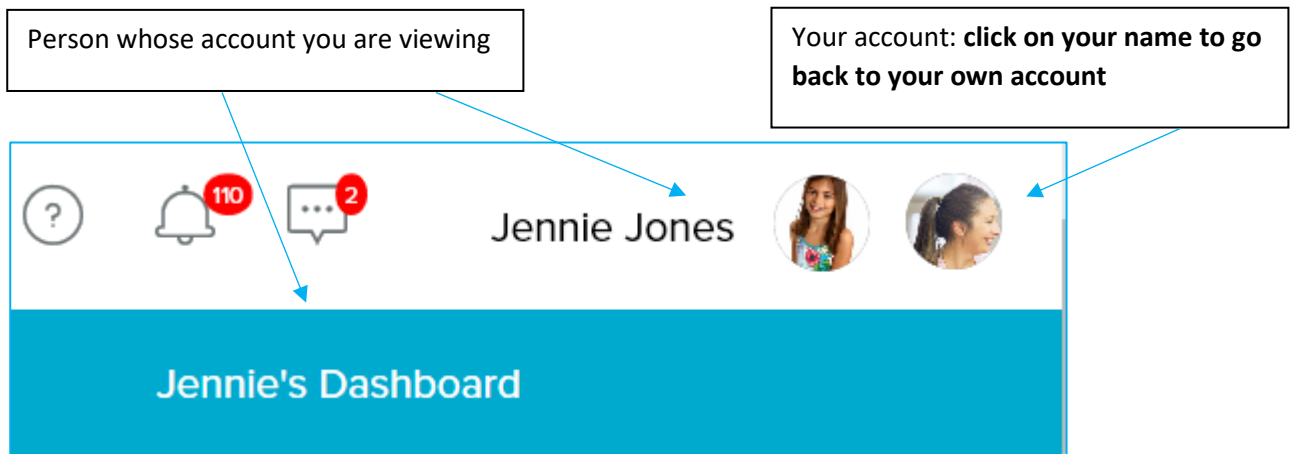
3. From “Your account” area, drop down menu

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.

- **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 user you must **access the account area of their Account** and select Personal Information. The option to transfer management is at the bottom of the page. Only people they are sharing their information with will be available to be invited to take over ownership. 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 **access the account area of their Account**, select Personal Information and scroll to the end of the page. If you do this 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.