Getting Started – Contacts and Sharing

IMPORTANT: This document describes how to work with **your own** contacts. If you want to update and work with the contacts for **someone whose account you manage** first **access their account** and go to **their** contacts page**.**

Many of the benefits of using MyLiferaft are related to your being able to share information with others. They may be relatives who want to keep in touch, professionals and practitioners with whom you need to share information or friends who offer your family practical and emotional support.

One of the biggest benefits of having a network of invited people is that you should no longer have to repeat the same information for each of them. Just refer them to the information you've already added to MyLiferaft. You can stop sharing or change the information they can see at any time.

- Add contacts
- Import contacts
- Share information with contacts
    - Change what you share
    - Stop sharing
    - Send a message
- Edit/delete a contact
- Respond to an invitation to share
- Access information others are sharing with you
- Access the accounts of people you are managing
- Add organisations

Add Contacts

- Click on **add new contact.**
- Enter all the relevant details on the form and click **Save** when finished.

We strongly recommend adding their **email address** so you can immediately see if they already have a MyLiferaft account.

Adding what their relationship to you is, will help reduce information you need to add in other areas of the system. You can then search for people based on their relationship to you (family, health care, education, friend etc.), certain permissions will be pre-selected if you choose to share information, reports will pre-populate based on someone's relationship to you, e.g your GP or a therapist etc.

Share your information with your contacts

**Step 1: Invite Contacts to have a MyLiferaft account**

Before you can share your information with someone you first need to invite them (they get a FREE account) to create a MyLiferaft account. You decide who to invite and when to invite them. If your contact already has a Myliferaft account you can go straight to **step 2.**

Click on the invite to MyLiferaft button. The user will receive an email and details of how to set up an account and you will be notified once they have an account. New notifications will show as a number on the bell icon, (top right of screen.) and you will receive an email.
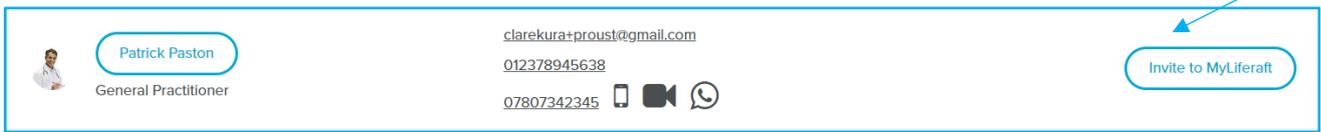
Step 2: Invite contacts to see your information

Contacts who have a MyLiferaft account can be invited to **share** your information.
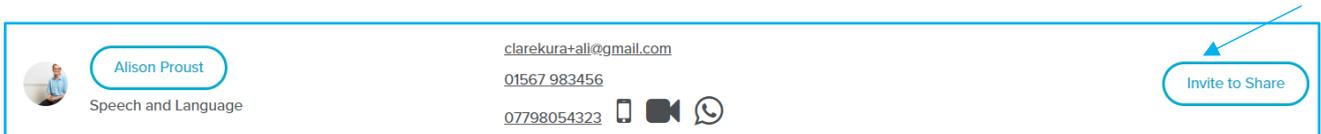

Click on invite to share. Permissions control what information your invited user can see. Select what information you want to share with them from the permission screen. Default permissions are based on the relationship you set up when adding the contact, but you can change these by checking or unchecking the boxes. The help button ? in the top bar **gives more details about permissions**.

The invited person will receive an email and you will be notified when they accept or decline your invitation.

Cancelling an invitation

Until the invitation is either accepted or declined, you will see the user listed on the pending tab in your contacts area, and you can **cancel** the request if you wish.
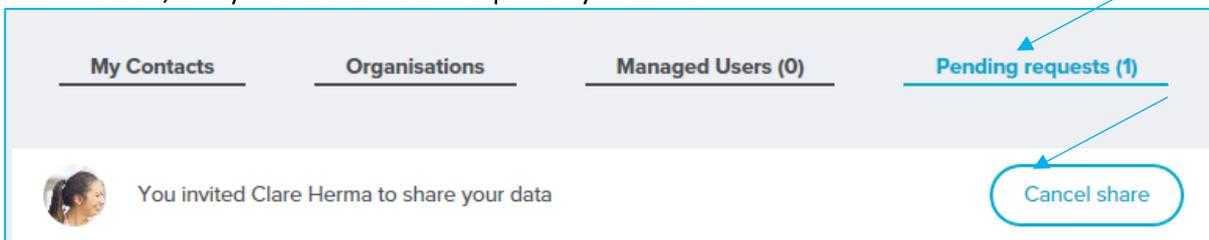

Changing permissions

If you want to change what your contact can see, no problem! Just click on the "permissions" button and change what you are sharing by selecting and de-selecting the boxes. The person you are sharing with will be notified of the changes.
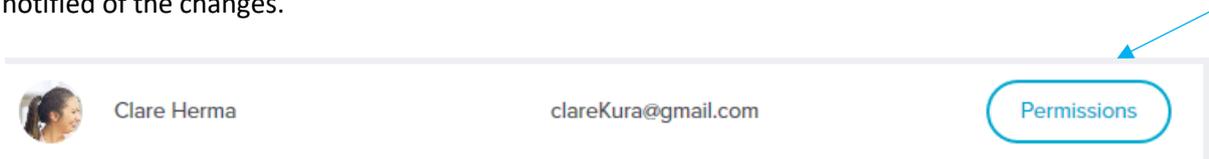
Stop sharing

You can stop sharing at any time. Click on the contact name and select stop sharing. Your contact will be notified of the change.

2
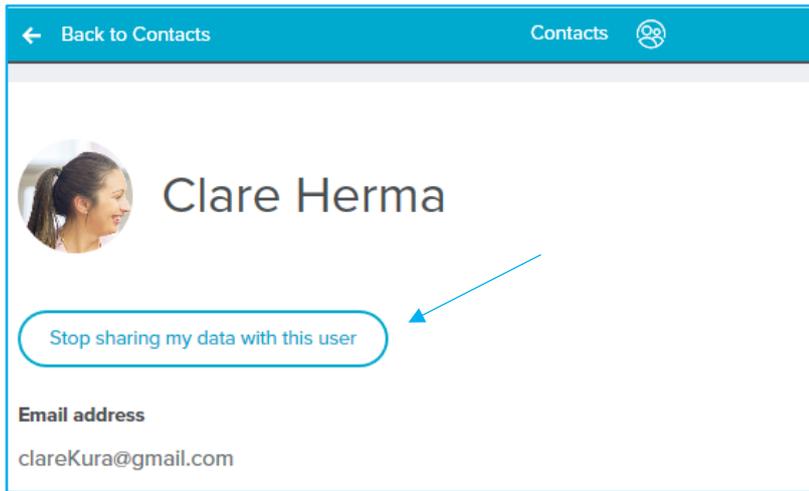
Send a Message:

Send a message to someone you are sharing with. Click on message button, type in your message and select Send Message. They receive a notification and can reply to you from the nofitication.

View details, Edit, and Delete a Contact

Click on the **contacts name** and select **edit**. Edit and/or delete the information

Accepting, Declining an Invitation to Share

If someone invites you to share their information, you will receive a notification (bell icon) and an email. From the notification, or from the pending requests area you can directly choose your response
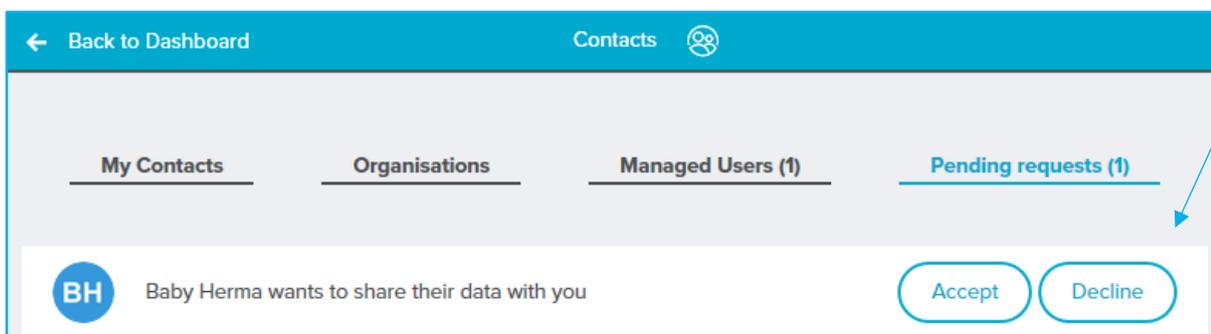

Accept: This will enable you to access that person's account by clicking on the view button next to their name. The inviter will be notified.
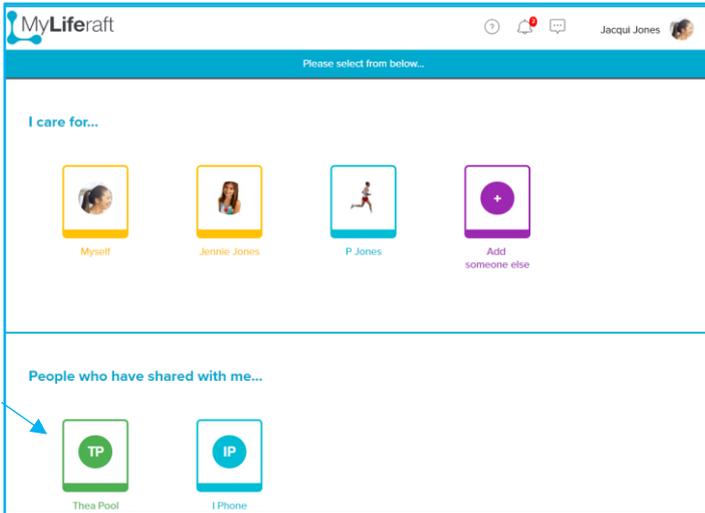
Decline: You won't be able to see this person's information and they will be notified you have declined their request to share

Accessing the information being shared with you

Once you have accepted a share request, you can access that person's information from your Contacts page by clicking on the View button
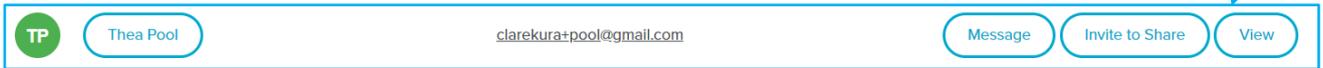

OR by selecting them from the selection screen

Once you click on View you will now be **seeing the other persons dashboard**, **you will only see icons on the dashboard** that contain information they have **given you permission** to see**.** If you feel you need to see more you can directly message the person who invited you using the **message** button.

Person whose account you are viewing.

Your account: Click here **to go back to your own account**.
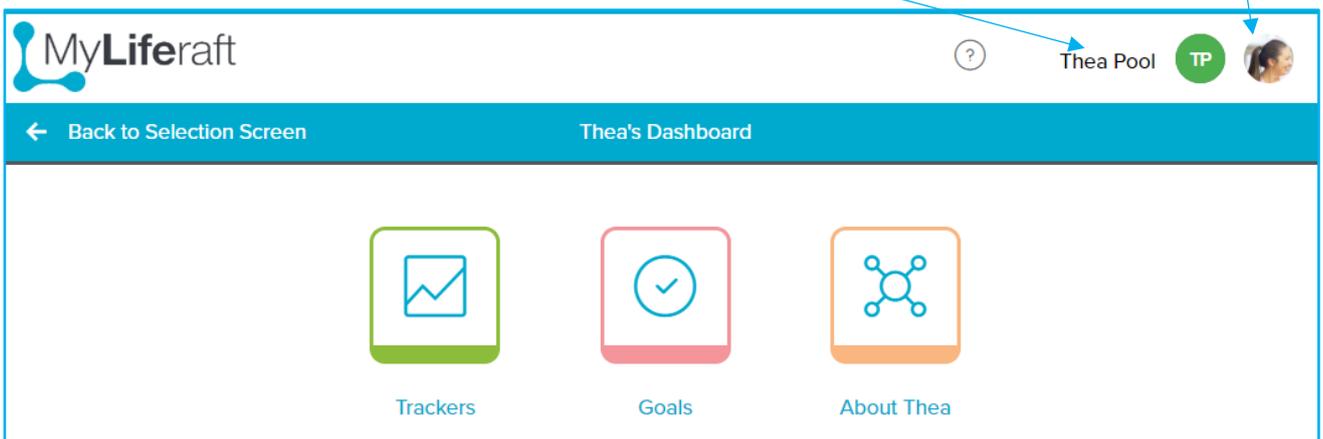
Once viewing a shared account you navigate as if it were your own account. You can also **add comments** to the information you are seeing. The account holder will be notified of new comments and can access and view them. (see Getting Started "Comments")

Accessing a managed Account

Any accounts that you manage are listed under the managed account tab. Click on their name to directly access their account.
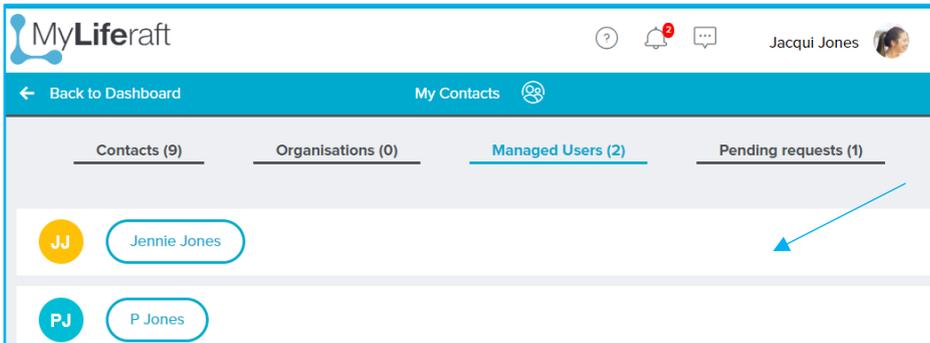

Or select them from the Selection Screen. You can access and update all the information of a managed account (see Getting Started "Managed Accounts" for more information)
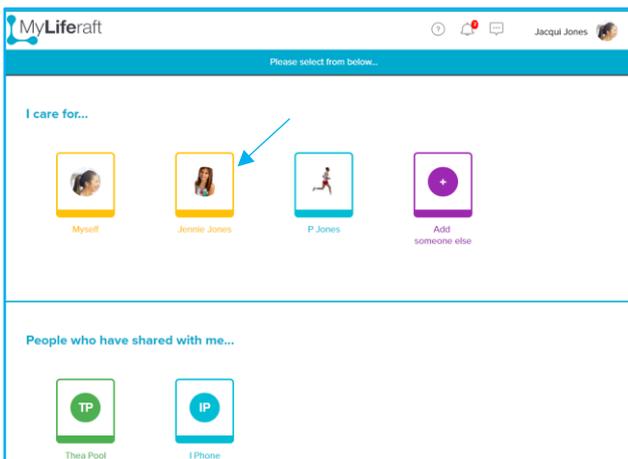
Adding organisations

Often people we interact with are part of an organization be it the local swimming club, a hospital or school. Select the organisations tab and add details of these organisations. Then when you add a contact you can link them   to these
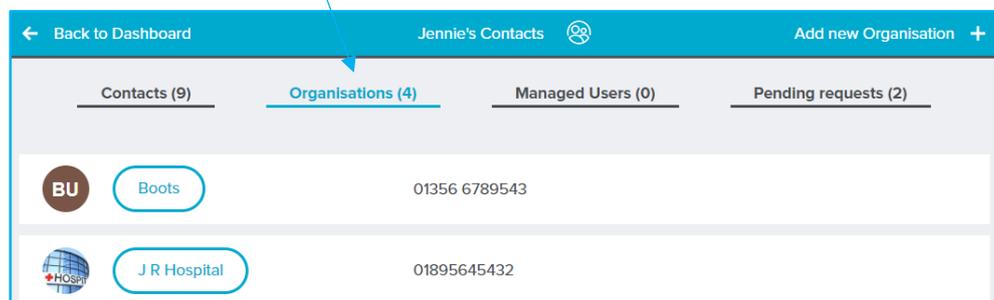
organisations and use the organisations address for your contact without having to re-enter it.

As with contacts, clicking on the organisation name will open a page from where you have the option to edit the information. Deleting an organisation is available from the edit page.