Who can see and do what in the mobile app

Equip has exactly two fixed kinds of app user — **participants** and **super admins**. Everyone in between holds a **custom role**: a set of options you compose in the role editor. This page covers the two fixed experiences, then maps every custom-role option to the functionality it unlocks.

The mobile app is built to grant a role exactly what the same role has on the web app — no more. Where the two differed, the app was changed to match the web.

> **Named roles are presets, not kinds.** The roles your account came with — Mentor, Supporter, Support, General Admin — are just saved combinations of the same dropdowns in Part II. To know what one of them grants, open it at **Settings → Permissions → Custom Roles** and read its settings against the map below.

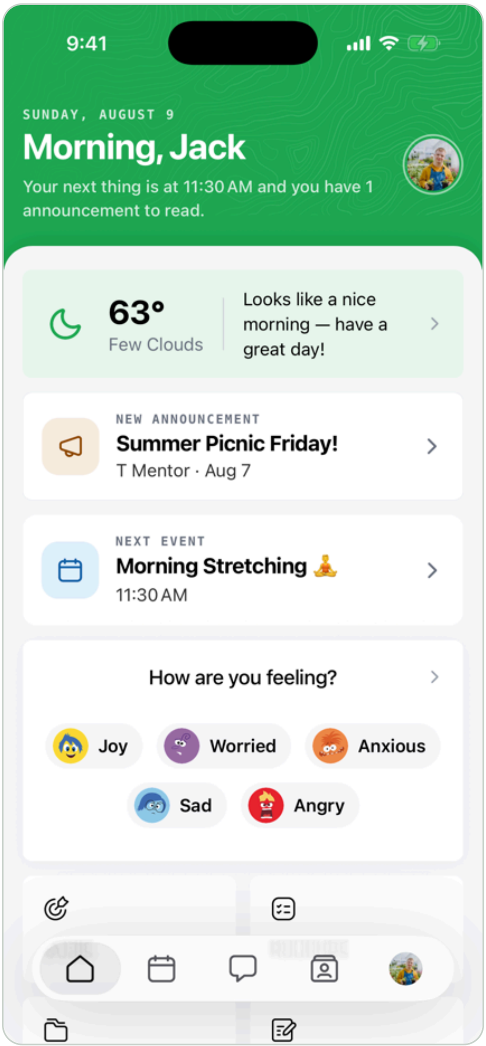
Why review roles now

Many custom roles were created for teams that never signed in to the web app, so their permission settings have never had a visible effect. The mobile app enforces those same settings on every screen. Before your team downloads the app, walk each custom role through the tables below and confirm every module is set to the level you intend — no more, no less.

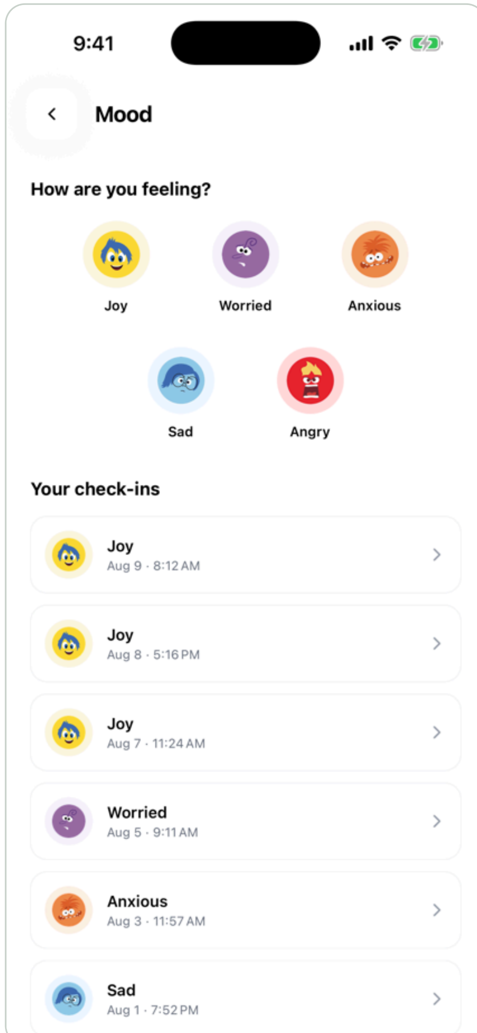
PART I

Participants

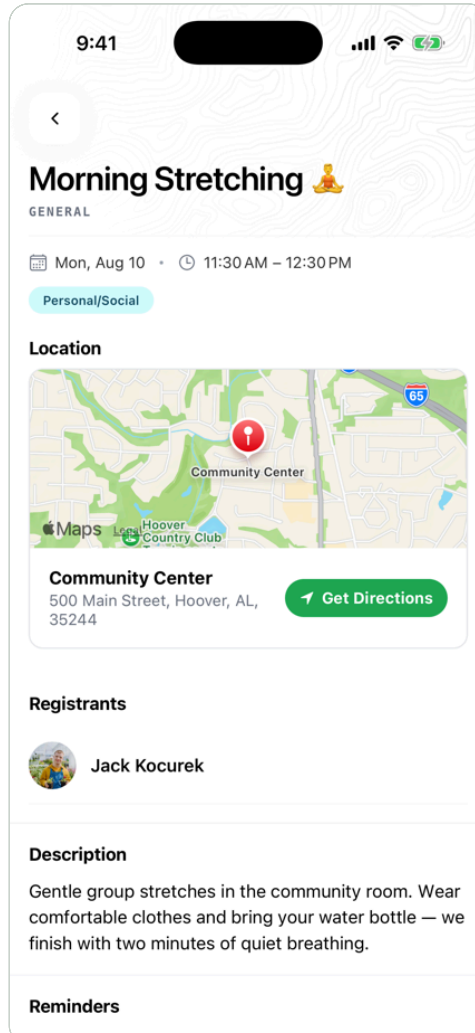
A participant's app is a fixed experience built on their own records. None of the module dropdowns in Part II apply to it — there is nothing to configure on a participant beyond the switches below.



Home — the day at a glance



Mood Navigator — check in, see your history



Event details, with the place and the plan

What a participant's app always contains

AREA	WHAT THEY SEE AND DO
Home	A personal day view: next event, today's routines, unread announcements, weather, and the Equip Card. Everything on it is theirs or was shared with them.
Routines	Run, build and delete their own routines. Routines built for them appear alongside their own.
Goals	Only goals explicitly shared with them. They can log progress; they cannot see unshared goals.
Mood Navigator	Check-ins and coping plans, when the account has the Mood Navigator feature. Their own history only.
Equip Card	Their ID and emergency information, always one tap from home.
Schedule	Their own calendar, plus Explore for events marked open to participant self-registration — including choosing single dates from a repeating series.
Announcements	Announcements addressed to them, with read tracking. They cannot compose.
Messages	Group chat for groups they belong to, when the account has the Groups feature.
Notes & documents	Only items explicitly shared with them.

The switches that do apply

SWITCH	EFFECT
Mobile access	Per account *and* per participant, and participants start switched **off**. Until both are on, they cannot sign in at all.
Account features	Mood Navigator, Groups, Goal Tracking and similar features remove their areas entirely when the account doesn't have them.
Sharing, per record	Goals, notes and documents reach a participant only when someone shares that record. There is no blanket switch.

PART II

Custom roles — every option, mapped

A custom role is composed from four kinds of options: a **scope of support**, one **level dropdown per module**, two **sensitive-data switches**, and the person's own **mobile access** switch. This part maps each option to what it unlocks, so you can read any role — including the presets — straight off its editor screen.

Four gates decide what a person sees

Module permissions are the last gate, not the only one. If an earlier gate is closed, the later ones never matter.

GATE	WHAT IT DOES
1. Mobile access switch	Per person. Team members start switched on. Controls whether that person can sign in — it does not hide their records from anyone else. The account membership must also be active.
2. Account features	Modules tied to a feature your account has not enabled (Forms, Assessments, Goals, Employment, Pathways, Mood Navigator, Groups, Contacts directory) do not appear at all.
3. Scope of support	`Restricted`, `Designated` or `Full` on the role. Decides *whose* records a person can open. Every "yes" below is bounded by it.
4. Module levels	One dropdown per module. Decides *what* they can do inside that scope.

Scope of support

SETTING	MEANING
Restricted — "Only own records"	Records the person created or is directly connected to. The narrowest setting.
Designated — "Assigned participants"	Participants assigned to them, plus records explicitly shared. The usual choice for caseload work.
Full — "All account records"	The whole roster. Unlocks the "All / Mine" filter on the People tab.

Emergency contacts follow participant access — anyone who can open a participant's profile sees them.

Two separate switches for sensitive data

- **Has PHI access** — reveals the health fields on the participant Overview: Medicaid details, diagnosis and disability information, and any custom fields placed in a medical section. Off by default outside clinical account types. Everyday profile details such as date of birth, sex and pronouns are *not* behind this switch, on web or mobile.
- **Has Legal access** — reveals guardianship and related legal fields.

The tab bar button follows these settings

Each member picks one tool for the middle slot of their tab bar (**Settings → Tab Bar Button**). The choices offered are exactly the tools their role can access under the map below — Chat, Schedule, Announcements, Forms, Assessments, Manage Categories, Manage Groups. If a saved choice later loses access, the slot falls back to their first accessible option; with no accessible option, the slot disappears from the bar.

Reading the module tables

Each row shows the *minimum* level that turns the feature on. Not every module offers all four levels. Notes and documents attached to a participant carry their own access settings, so deleting those is decided record by record rather than by a dropdown.

Account Settings

Levels: None · Viewer · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Manage Categories	Administrator	Reached from the Toolkit, and can be pinned as the tab-bar button.

Announcements

Levels: None · Viewer · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Read announcements	Viewer	Also shows per-person read receipts, and offers Announcements as a tab-bar button.
Compose & send	Administrator	Recipients can be picked individually or by group.

Assessments — *needs the Assessments feature*

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Assessments section on a participant profile	Viewer	Response details are read-only on mobile.
Start an assessment for a participant	Viewer	Anyone who can open the section can run one. The levels govern the assessment *templates*, not recorded responses.
Org-wide Assessments hub	Administrator	Also unlocks the Assessment quick action on home and the tab-bar option.

Documents

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Documents section on a participant profile	Viewer	Pinned documents also appear on the profile overview.
Upload documents for a participant	Supporter	
Delete documents	Per document	A participant's documents carry their own access settings. Documents generated from a form response can never be deleted here.

Employment Tracking — *needs the Employment Tracking feature*

Levels: None · Viewer · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Employment section on a participant profile	Viewer	Read-only on mobile; adding and editing stays on the web app.

Calendar

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Calendar & event details	Viewer	Which events appear follows the role's scope of support. Schedule can be pinned to the tab bar.
Create events	Supporter	Editing is offered on events the person created. Unlocks the Schedule Event quick action.
Delete events	Administrator	
Sign yourself up for an open event	Any app user	Not governed by this module — anyone who can see an open event can take a place in it, one date, chosen dates, or the whole series.
Register or remove someone else	Supporter	Only for people already in your scope of support, and only on events you can see — the same rule the web app applies when you edit an event's attendees.
Check attendees in and out	Supporter	Granted by the **Team** module together with Participants access to open the roster — not by the Calendar level.

Forms — *needs the Forms feature*

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Forms section on a participant profile	Viewer	Any Forms access also offers Forms as a tab-bar option.
Fill a form for a participant	Viewer	Anyone who can open the section can fill one in. The levels govern the form *definitions*, not submitted responses.
Org-wide Forms hub	Administrator	Lower levels still fill forms from each participant's profile.

Individual forms can additionally be restricted to specific roles.

Goals — *needs the Goal Tracking feature*

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Goals section on a participant profile	Viewer	
Log progress on a goal	Supporter	Creating and editing goals stays on the web app.
Share a goal with the participant	Supporter	The "Share with ..." switch decides whether it appears in their own app.

Groups — *needs the Groups feature*

Levels: None · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Messages & group chat	Supporter	People can only message groups they belong to. At None the Chat tab is hidden entirely.
Manage groups	Administrator	Also offered as a tab-bar option.

Mood Navigator — *needs the Mood Navigator feature*

Levels: None · Viewer · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Latest-mood chip on a participant profile	Administrator	Administrator is the minimum *standard* level: Viewer grants only the org-level view, which has no mobile surface. Note that the front-line preset role ships with a non-standard mask that includes this chip — one of the extras a save would strip.

Notes

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Notes section on a participant profile	Viewer	
Write & edit notes	Supporter	Voice dictation and offline drafts included.
Delete notes	Per note	Notes on a participant carry their own access settings. Set access on the note itself.

Participants

Levels: None · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
People tab & participant profiles	Supporter	*Which* participants appear follows the role's scope of support. Each section tile is further governed by its own module.
Edit a participant's profile	Administrator	
Assign supporters & groups	Administrator	

This is the master switch. At None the People tab is empty and every participant-scoped feature is unreachable, whatever the other modules say.

Pathways — *needs the Pathways feature*

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Pathways on a participant profile	Viewer	Read-only on mobile, so Viewer and Supporter behave identically. Step completion, enrollment and discharge stay on the web app.

Routines

Levels: None · Viewer · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
Routines section on a participant profile	Viewer	
Build & edit routines for a participant	Supporter	
Delete routines	Supporter	Unusually for a module, Supporter includes delete. Participants can always delete their own personal routines.

Team

Levels: None · Supporter · Administrator

MOBILE FEATURE	MINIMUM LEVEL	NOTES
See team members	Supporter	Team-member pickers and the birthdays widget.

Two things that catch people out

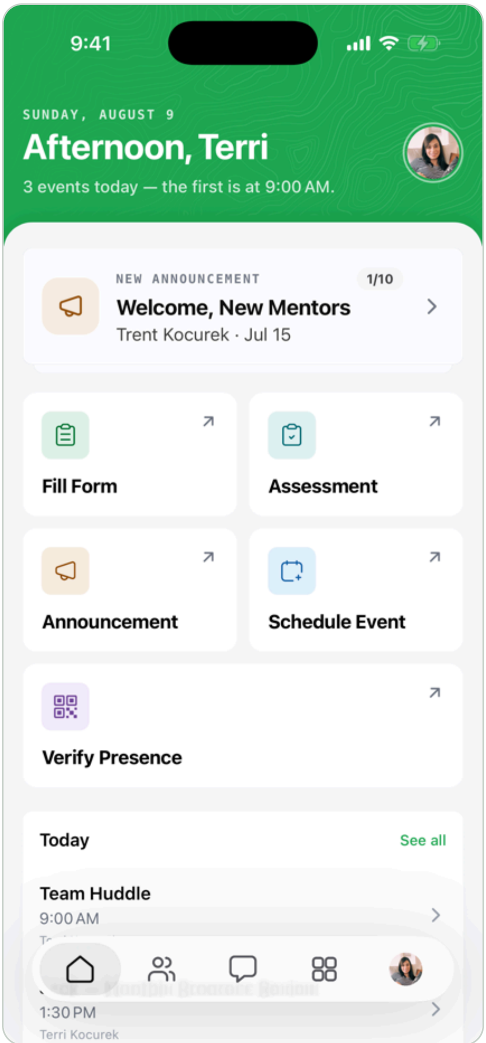
A brand-new role cannot see documents and notes that already exist. Notes and documents attached to a participant carry their own access settings, written when the record is created, for the roles that existed at that moment. A role you create today is not on any of them — so it opens Documents and Notes and finds them empty, no matter how high you set those modules. Only records created *after* the role exists will appear. Plan for this before moving people onto a new role.

Saving a role rewrites every module on it, not just the one you changed. The roles created with your account start with slightly more than any single dropdown choice represents. The editor shows the closest matching level, and saving writes exactly that level back — so editing a role for any reason, even renaming it, can quietly remove abilities it had. If a role is working as you want, leave it alone; if you must edit it, check the modules you did not intend to touch afterwards.

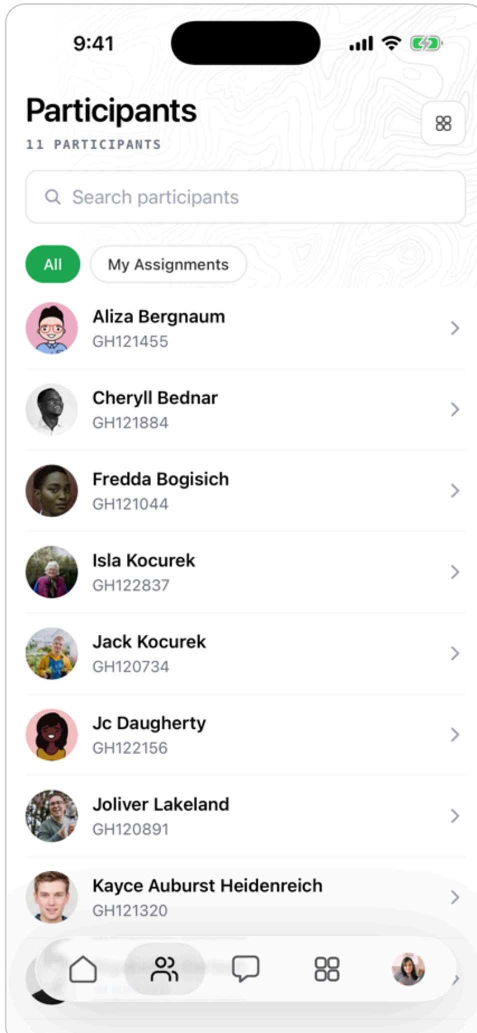
PART III

Super Admins

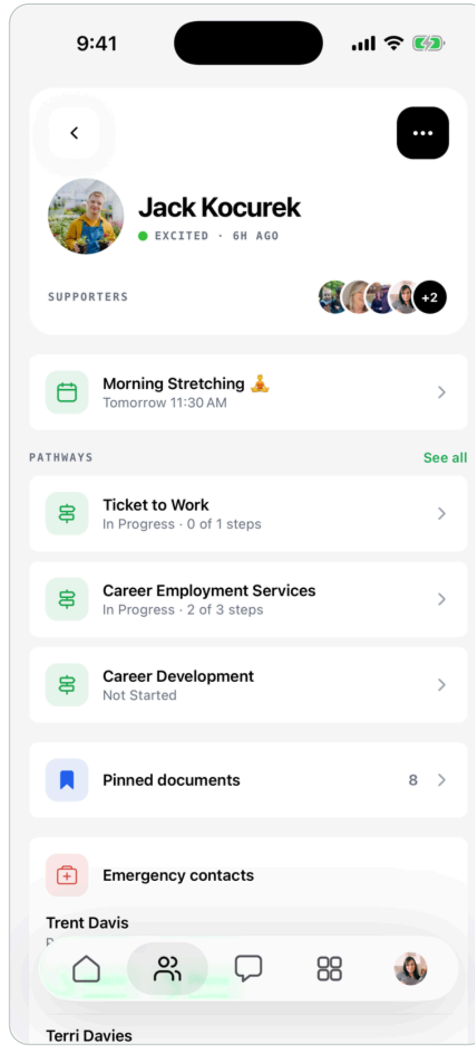
Super Admin (and Equip Admin) is the other fixed kind of user. The module dropdowns in Part II never apply — a super admin passes every module check automatically, at Full scope, with PHI and Legal access.



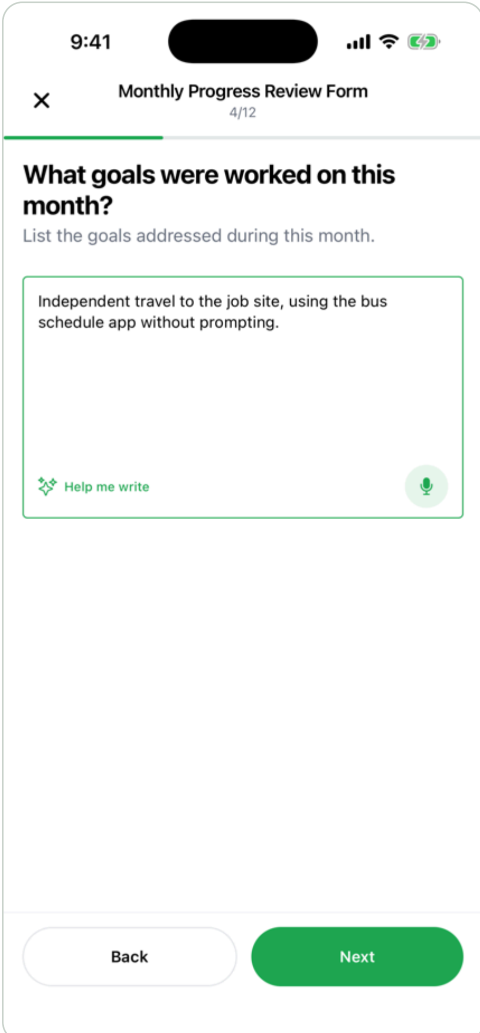
Home — the day, plus one-tap actions



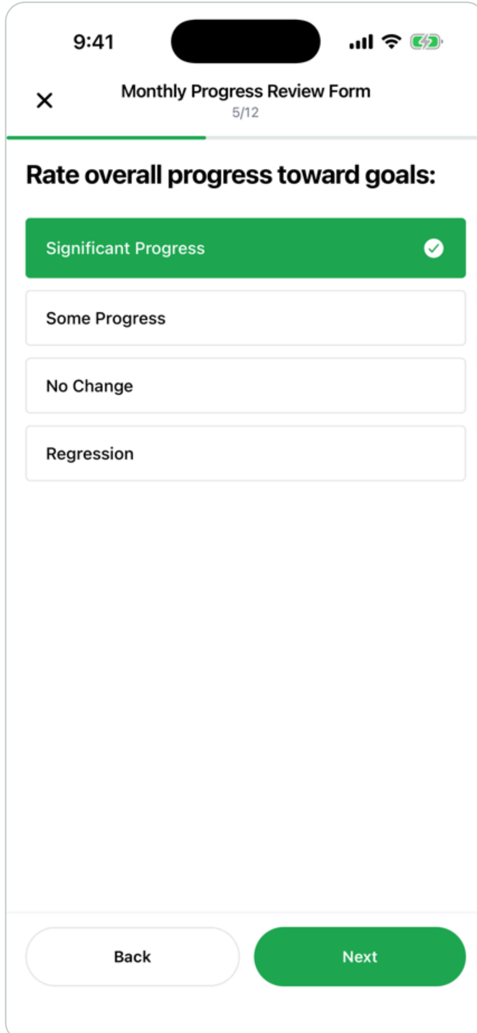
Participants, scoped to what the role allows



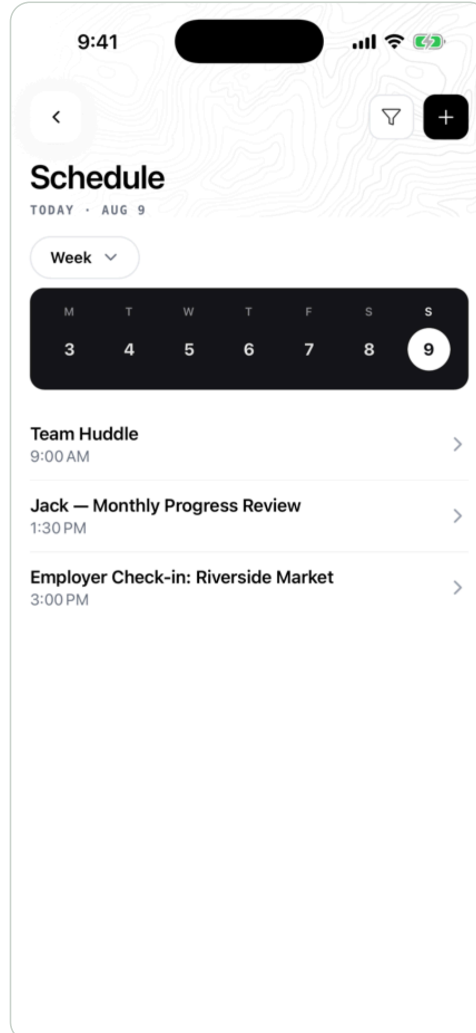
A participant profile, section by section



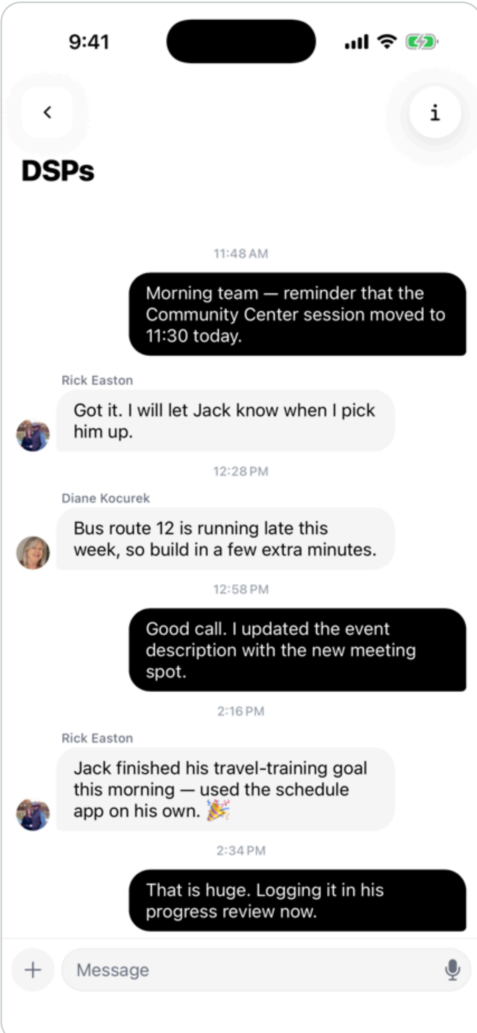
Documentation with dictation and AI assist



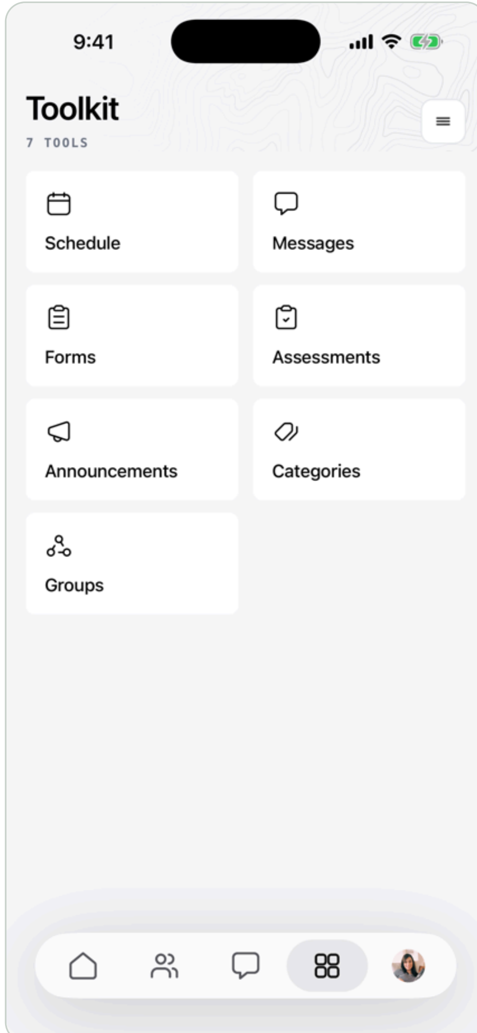
Structured answers, one question at a time



The week, and today's visits



Team chat, in context



The toolkit — everything the role can reach

What that means in the app

AREA	WHAT A SUPER ADMIN GETS
People	The entire roster, every section of every participant profile, profile editing, supporter and group assignment.
Quick actions	All of them: Fill Form, Assessment, Announcement, Schedule Event — plus feature-gated ones (such as Verify Presence) when the account has the feature.
Toolkit & tab bar	Every tool in the Toolkit, and every tab-bar button option: Chat, Schedule, Announcements, Forms, Assessments, Manage Categories, Manage Groups.
Org-wide hubs	Forms and Assessments hubs, announcement composing with read receipts, group and category management.
Sensitive data	PHI and Legal fields are visible without any switch.

What still applies to a super admin

LIMIT	WHY
Mobile access switch	A super admin with the personal switch off cannot sign in, like anyone else.
Account features	Features the account doesn't have stay hidden — bypassing module levels doesn't invent features.
Per-record access on notes & documents	Deleting is still decided by the record's own access settings.

The 10-minute spot check, per role

1. Open **Settings → Permissions → Custom Roles** and pick a role people actually hold.
2. Confirm **Scope of support** matches the job: Designated for caseload work, Full only when someone genuinely needs the whole roster.
3. Confirm **Participants** is set — it is the master switch.
4. Walk each module dropdown against the tables above, asking "should this role *see* it, *do* it, or *manage* it?"
5. Check **Has PHI access** and **Has Legal access** are only on where needed.
6. For anyone who should not use the app at all, turn off their personal **mobile access** switch rather than hollowing out the role. Remember participants start with that switch off.
7. Before creating a new role, check whether an existing one already fits — a new role starts with no access to documents and notes that already exist.

Fine print

Last verified August 9, 2026 — every claim on this page was walked against a live account: the participant and super-admin experiences as-is, and each module level (None, Viewer, Supporter, Administrator) applied to a real custom role and checked screen by screen. This is a living document; it grows as features ship.

Minimum levels reflect the standard options each module offers in the role editor. Roles customized before this guide existed may hold non-standard combinations; the "Reset to Default" action restores the standard set for a role's base type.

Account-type presets differ: CRP accounts grant supporters broader Routine and Employer defaults and turn PHI and Legal on; Family accounts hide most program modules.

Full how-to for the role editor: Setting RBAC permissions in Equip