

Roles cheat sheet

What an Owner, Admin, and Member can each do in a family workspace, and where professionals fit.

A family workspace has three roles: Owner, Admin, and Member. This is a quick reference for what each one can do, plus how professionals differ.

The three workspace roles

Owner. Created the workspace, or was promoted to Owner later. Can do everything an Admin can, plus the most sensitive actions: deleting the workspace, transferring who manages a profile, and removing other administrators. A workspace can have more than one Owner, and there is always at least one (the last Owner cannot be removed or demoted).

Admin. Full day-to-day control. Add and edit profiles, log trackers, edit plans, invite new members, and change roles. The right role for a co-parent who shares the load equally.

Member. Can see every profile in the workspace and contribute to it (log trackers, check off tasks, add notes), but cannot invite people, change roles, or perform destructive actions like deleting a profile. The right role for a grandparent or a long-term sitter who helps but should not be restructuring the account.

What each role can do

ACTION	OWNER	ADMIN	MEMBER
See every profile in the workspace	Yes	Yes	Yes
Log trackers, check off tasks, add notes	Yes	Yes	Yes
Add or edit a profile	Yes	Yes	No
Invite members and set roles	Yes	Yes	No
Remove a member	Yes	Yes	No
Delete a profile	Yes	Yes	No
Transfer who manages a profile	Yes	No	No
Delete the workspace	Yes	No	No

If you are not sure which role to give someone, Member is the safe default. You can promote them later.

Professionals are not a workspace role

A coach or therapist does not hold any of the roles above. They are not in the workspace at all. They are invited to a single profile, and what they can see is set per area (plans, timeline, trackers, documents, calendar, activity feed, messages) when you invite them.

This means a professional's access is narrower and more specific than any workspace role: one profile, only the areas you chose, and nothing else. See [Working with a coach or therapist](#) for how that invite works.

Changing or removing access

Any role assignment can change. From [/settings/family](#) , an Owner or Admin can promote a Member to Admin, demote an Admin, or remove someone entirely. Removing a member revokes their access immediately. Professional access is managed separately, from the profile you shared with them.