Avanza

Sharing & Team Management

User Guide

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1. Overview

Avanza provides two ways to give other practitioners access to your student data:

Team Plans — Add members to your team subscription. You control which students and charts each member can access, and at what permission level. Ideal for supervisors, program directors, and organizations managing multiple practitioners.

Share Codes — Generate a short code to share a student or specific charts with any Avanza subscriber. Set the permission level, duration, and number of uses. Ideal for sharing with parents, consultants, or practitioners outside your team.

Both methods enforce permission levels at every point in the application. View-only users can see charts but cannot modify anything. Collect users can add data but cannot change chart settings. Full edit users can do everything except delete.

2. Permission Levels

Every shared student or chart has one of four permission levels. The table below shows exactly what each level allows:

Action	View	Collect	Edit	Owner
View charts and data	✓	✓	✓	✓
Add new data points	✗	✓	✓	✓
Edit chart settings	✗	✗	✓	✓
Add new charts	✗	✗	✓	✓
Edit student info	✗	✗	✓	✓
Archive charts	✗	✗	✓	✓
Delete students	✗	✗	✗	✓
Delete charts	✗	✗	✗	✓
Share with others	✗	✗	✓	✓

Tip: When in doubt, start with View Only. You can always upgrade a member's permission later without creating a new share.

3. Team Plans & Groups

3.1 What's Included

The Team plan ($49/month) includes access for you (the owner) plus 4 member slots. You can purchase up to 30 additional slots at $10/slot/month, for a maximum of 35 users (you + 34 members).

3.2 Creating Groups

Groups help you organize members. For example, you might create separate groups for different semesters, classrooms, or clinical teams.

1. Navigate to Team Management from the sidebar.
2. Enter a group name in the "New Group" field (e.g., "Fall 2026 Seminar").
3. Set the number of initial slots (default: 4).
4. Click Create Group.

Your group will appear with the specified number of slots, ready for invite codes.

3.3 Understanding Slots

Base slots are included with your Team plan (4 slots). They cost nothing extra and can be reassigned between groups.

Extra slots are purchased on top of your base plan at $10/slot/month. When you retire a group, base slots return to your pool and extra slots are removed from your bill.

> **Tip:** If you retire a group and have extra slots in other groups, Avanza automatically replaces them with freed base slots to reduce your bill. This is called rebalancing.

4. Inviting Team Members

4.1 Generating Invite Codes

1. Go to Team Management and find your group.
2. Click Generate Codes. This creates a unique invite code (e.g., AVZ-X30Q-ZEQQ) for each available slot in the group.
3. Invite codes appear in the “Invite Code” column of the slots table.

4.2 Sending Invites by Email

1. In the group card, find the “Email invites” text area at the bottom.
2. Enter one or more email addresses (separated by commas or new lines).
3. Click Send Invites.
4. Each recipient receives an email with their unique invite code and instructions.

4.3 How Recipients Join

1. The recipient goes to avanza.miradordatalab.com.
2. They create an account or log in.
3. On the access gate screen, they enter the invite code and click Redeem Code.
4. They are added to your team and can access the app.

> ⚠ **Note:** Invite codes expire after 14 days. If a code expires before being used, generate a new one from the group card.

5. Managing Student Access for Team Members

After a member joins your team, they cannot see any of your students until you explicitly grant access. This gives you full control over who sees what.

5.1 Granting Access

1. Go to Team Management and find the group containing the member.
2. In the “Member Data Access” section, click the member’s name (with the gear icon).
3. A modal window opens showing all of your students with checkboxes.
4. Check the students you want the member to access. Use Select All for bulk assignment.
5. Set the default permission level (View Only, Collect Data, or Full Edit).
6. To give different permissions for specific students, use the per-student dropdown next to each name.
7. Click Save Access.

> **Tip:** The modal remembers existing permissions. Students the member already has access to will be pre-checked with their current permission level shown.

5.2 Changing Permissions

To change a member’s permission level on a student, open the same modal, adjust the dropdown for that student, and click Save Access. Changes take effect immediately.

5.3 Revoking Access

To remove a member’s access to a student, open the modal and uncheck that student. Click Save Access. The member will no longer see that student in their student list.

6. Sharing with Non-Team Users

Share codes let you give any Avanza subscriber access to a student or specific charts, without adding them to your team.

6.1 Creating a Share Code

1. Navigate to a student's profile.
2. Expand the Sharing panel (below Charts, above Clinical Notes).
3. Configure the share settings:

Scope: Entire Student (all charts) or Specific Charts (select individually).

Permission: View Only, Collect Data, or Full Edit.

Duration: 7 days, 30 days, 90 days, 1 year, or no expiry.

Max Uses: How many people can redeem this code (default: 1).

Include History: Whether the recipient sees all past data or only data from the share date forward.

4. Click **Generate Share Code**.

A code in the format AVZ-S-XXXX-XXXX appears in a green box. Copy this code and send it to the recipient via email, text, or any other channel.

> ⚠ **Note:** Share codes require the recipient to have an active Avanza subscription. Non-subscribers will receive an error when trying to redeem.

7. Redeeming a Share Code

1. Log in to Avanza.
2. On the Dashboard, find the “Shared With Me” card.
3. Enter the share code in the text field (e.g., AVZ-S-K0W8-65RL).
4. Click Redeem.
5. A green confirmation message appears. The shared student now appears in your student list.

Shared students display alongside your own students. You will see them with the permission level the owner set (View, Collect, or Edit).

> **Tip:** If you receive a View Only share, you will see the student’s charts and data but cannot add observations or change settings. An “Access: VIEW” badge appears on the student profile.

8. Managing Active Shares

8.1 Viewing Your Shares

On any student profile, expand the Sharing panel to see all active share codes for that student. The table shows:

Code: The share code that was generated.

Permission: The access level (View, Collect, or Edit).

Expires: When the code stops working.

Uses: How many times the code has been redeemed vs. its maximum.

History: Whether historical data is included.

8.2 Revoking a Share

1. On the student profile, expand the Sharing panel.
2. Find the share you want to revoke in the table.
3. Click the red Revoke button.
4. Confirm the action. The recipient immediately loses access.

> ⚠ **Note:** Revoking a share is permanent. To restore access, create a new share code.

9. Managing Individual Slots

9.1 Freeing a Slot (Removing a Single Member)

Each occupied slot in the group's slots table has a yellow Free button under the Actions column. Use this to remove a specific member from your team without retiring the entire group.

1. Go to Team Management and find the group.
2. In the slots table, find the row for the member you want to remove.
3. Click the yellow Free button.
4. A confirmation dialog appears: "Free this slot? The member will have a 14-day grace period."
5. Click OK to proceed.

What happens: The member's slot is freed and becomes available for a new invite. The freed member enters a 14-day grace period during which they retain access to the app. After 14 days, their access is deactivated unless they subscribe on their own or join another team.

> **Tip:** Freeing a slot does not change your bill. The slot remains in your group as an available slot, ready for a new invite code.

9.2 Removing Extra Slots (Reducing Your Bill)

If a group has paid extra slots and you want to reduce costs, use the orange Remove Extras button on the group card. This button only appears when a group contains extra (paid) slots.

1. Go to Team Management and find the group with extra slots.
2. Click the orange button labeled "Remove N Extra (-$N×10/mo)".
3. A confirmation dialog shows the billing impact and warns that occupied extra slots will be freed.
4. Click OK to proceed.

What happens: All extra slots in the group are retired. Any members occupying those extra slots are freed with a 14-day grace period. Base slots in the group are unaffected. Your Stripe billing is updated immediately.

> ⚠ **Note:** If you have 6 slots in a group (4 base + 2 extra) and click Remove Extras, you'll keep 4 base slots and lose the 2 extras. Members on those extra slots will be freed.

10. Retiring a Group

When a semester ends or a team restructures, you can retire a group. This frees all members and adjusts your billing.

10.1 What Happens When You Retire a Group

Members: All members are freed from their slots. They enter a 14-day grace period during which they retain app access. After 14 days, their access is deactivated unless they subscribe individually.

Base Slots: Return to your unassigned pool. If other groups have paid extra slots, Avanza automatically swaps them with the freed base slots to reduce your bill (rebalancing).

Extra Slots: Retired permanently and removed from your monthly bill.

Invite Codes: All active codes for the group are revoked.

10.2 How to Retire a Group

1. Go to Team Management.
2. Find the group you want to retire.
3. Click Retire Group (red button).
4. A confirmation dialog explains the consequences. Click OK to proceed.

10.3 Removing Extra Slots Without Retiring

If you want to reduce costs but keep the group active, click the orange Remove Extras button on the group card. This retires all extra slots in the group while keeping base slots and the group active.

11. Billing & Slot Management

11.1 Adding Slots

Each group card has +1 Slot ($10/mo) and +5 Slots ($50/mo) buttons. A confirmation dialog shows the cost impact before proceeding. The “Extras Left” counter in the Team Management header shows how many more slots you can purchase (maximum 30 extra).

11.2 How Billing Works

Base plan: $49/month includes you + 4 member slots.

Extra slots: $10/month each, billed through Stripe.

Rebalancing: When you retire a group, freed base slots automatically replace extra slots in your other groups, reducing your bill.

11.3 Example Scenario

You create Group A with 4 slots (all base, $0 extra). Then Group B with 6 slots (0 base + 6 extra = $60/mo added). Your total: $49 + $60 = $109/mo.

You retire Group A. The 4 base slots return to your pool. Avanza rebalances: 4 base slots replace 4 extras in Group B. Now Group B has 4 base + 2 extra. Your bill drops to $49 + $20 = $69/mo.

12. Frequently Asked Questions

Can a team member see all my students automatically?

No. Members see nothing until you explicitly grant access through the Member Data Access modal. You have full control over which students each member can see.

What's the difference between a team invite and a share code?

A team invite (AVZ-XXXX-XXXX) adds someone to your team subscription and gives them a slot. A share code (AVZ-S-XXXX-XXXX) shares specific data with someone who already has their own Avanza subscription.

Can I share with someone who doesn't have Avanza?

No. Both team invites and share codes require the recipient to have an Avanza account. Team invites grant access through your plan. Share codes require the recipient to already have an active subscription.

What happens to shared data when I revoke access?

The recipient immediately loses the ability to view or modify the shared student and charts. No data is deleted — your original data is unaffected.

Can a View Only user export data?

View Only users can see charts and data but cannot modify, add, or delete anything. Data export follows the same permission level as viewing.

What happens if a share code expires?

The recipient retains access until the expiration date on the share. Once expired, they can no longer see the shared content. You can create a new share code to restore access.

Can I transfer student ownership to a team member?

When retiring a group, you can choose whether student data transfers to the member, is copied (both retain access), or is revoked. This is configured per-student during the group retirement process.

How do I see who has access to my students?

On any student's profile, expand the Sharing panel. The Active Shares table shows all current share codes and their recipients. For team access, use the Member Data Access modal in Team Management.

Is my data secure when shared?

Yes. All data is transmitted over encrypted connections (TLS 1.2+). Permission enforcement happens server-side — even if the UI were bypassed, the server blocks unauthorized actions. All sharing actions are logged in an audit trail.