

Managing And Using Accounts In Loop

Frequently Asked Questions



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Managing and using accounts in Loop

This is an FAQ for user accounts based on user feedback so far. This document will cover using Loop accounts as an end user and managing user accounts as a HealthRoster administrator in Optima.

How to use your personal account

How do I sign up to Loop?

To use Loop, you need to set up your personal Loop account first that you can then connect to your organisation to view your rostering. Please note, this is only for users who have not used the Me App. If you are already a Me App user, please see [Do I need to sign up if I have a Me account?](#)

To sign up, you need to enter your personal email address and a password that requires at least one capital letter and one number. You also need to enter your first name and last name. This will be the name that will be displayed on your profile.

You will be invited to sign up with a phone number, this is optional, and you can also skip this step. For more information on this, please see [Do I have to sign up using my phone number?](#)

You will be asked to confirm your account via the email address you have entered when signing up. Confirm on the email you receive and refresh the page of the app.

You now have a Loop account that you can connect to any organisation you work at as long as you have an account there. For more information on this please see [How do I connect to an organisation?](#)

What email address should I use when signing up to Loop?

Although it is up to you, we would recommend you use your personal email address rather than your work one. Loop is designed to go with you should you change jobs to another organisation. It also supports being connected to multiple organisations at once. Having an email address that won't be disabled when you leave an organisation will mean that you can take your same profile information and any connections you've made with you to the next organisation with the same log in details.

Do I have to sign up using my phone number?

No. This sign-up method is completely optional. It is a requirement to sign up using your email address, but the phone number option is only there if you want to use it.

If you choose to sign up with your phone number, it will send you a code via text that you will need to enter. After this, you can log in by using your phone number and entering a new code each time.

If you don't want to sign up using your phone number but may want to later, all you need to do is log out and log back in again. When you log in using your email address, you will be navigated back to the option to sign up using your phone number.

What happens if I enter the wrong email address in signing up?

Simply press cancel and start again. If you have already signed up using your phone number before realising that you had used the wrong email address, ask your administrator to raise a ticket with RLDatix with the details of the wrong email account and they can unlink your phone number from the wrong email address.

What happens if I want to change my phone number, name, or email address for my Loop account?

At the moment, you can't change an email address, name, or phone number in your user account. We are going to be introducing a new profile feature in the future that allows you to manage your account details and make changes to your email address, phone number and name.

What happens if I forget my email address?

Just contact your HealthRoster administrator. They can let you know which email address is linked to your Loop account.

What happens if I forget my password?

On the login page, there is a **Don't remember your password?** option. If you select that, it will send you an email to change your password.

Do I need to sign up if I have a Me account?

No. If you have a Me account in an organisation that has gone live with Loop, then all you need to do is log in with the same details and you will have access to Loop.

How do I connect to an organisation?

Once you have signed up to Loop you will be given an option to connect to an organisation. If your organisation has gone live with Loop, you will see it in the list of organisations. Select yours and enter in your EmployeeOnline/HealthRoster account details. If you don't know what your account details are for this, please contact your HealthRoster administrator.

Can I connect to more than one organisation at once?

Yes. If you are working in more than one organisation at the same time, you can connect to them on the same profile and switch between them as needed.

How do I know which organisation I'm viewing if I'm connected to more than one?

For all your information attached to the communications side, such as your **Newsfeed**, **Groups**, and **Pages**, you will always see them together in one view regardless of the organisation you have selected.

For all your rostering side, such as your roster, requesting bank and leave, you will need to switch to the organisation that you require to perform the action against. The option to switch your organisations and to view which organisation you are currently connected to can be found in the top right-hand corner of your roster page.

Can I disconnect from an organisation once I've joined?

Yes. You can disconnect from an organisation at any time as long as your EmployeeOnline/HealthRoster account is still active. Just access the organisations you are connected to in the top left corner of the main Loop action page and select **Disconnect Organisation**.

If your account has already been closed in HealthRoster, you won't be able to disconnect from the organisation in the same way but instead simply log out and back in again and you will see the organisation is removed from your account.

Can I delete my Loop account once I've created it?

Yes. In the main Loop action page, under **Settings and Privacy**, you will have the option to delete your Loop account. This is a permanent option and if you complete this action, you won't be able to use that account, nor the email address used for it again.

What do I do when I leave an organisation and join a new one?

When you leave an organisation, you should find that your HealthRoster administrators will have closed your account which will disconnect you from that organisation automatically after your last day. The best way to view this change is to log out and log back in again. If you see that you are still connected however, you can manually disconnect yourself by selecting the organisation in your list, selecting **Disconnect Healthcare Provider**, and entering in your EmployeeOnline/HealthRoster login details.

Once I leave an organisation, do I lose the connections I've made?

No. You get to keep your connections after leaving an organisation.

How to manage user accounts

How do I set up an account in HealthRoster for a Loop user?

The same way as you would for an EmployeeOnline/Me account. If they already have one of these accounts, there's nothing additional you need to do. Just tell them to use those login details when connecting to your organisation.

Is Loop secure?

Yes. The only way to access your organisation's information is by using their EmployeeOnline/HealthRoster account, this means you have complete control over who uses the app.

Once Loop is available, can anyone in the organisation use it?

Once your organisation has gone live with Loop, anyone can download the app and connect to the organisation if they have an EmployeeOnline/HealthRoster account in your HealthRoster. However, we've not seen a problem in this area as most employees won't know to download it before you have asked them to.

Will Loop have the same feature access control as we currently have in EmployeeOnline?

Yes. On the rostering side of the app, we have made no changes to the feature access control. Anything you had set up for EmployeeOnline will be the same for their Loop account.

What additional feature accesses are required for Loop?

You will need to add the following feature accesses to all accounts using Loop to get the basic access:

- **Services: Allocate Loop**
- **Services: Loop Rostering**
- **Services: Ref Data**

For those users who will be able to create new groups and pages, they will also need:

- **Loop: Can Create a Group**
- **Loop: Can Create a Page**

For those users who will be moderators for the app, they will need:

- **Loop: Moderator**

If you have purchased the engagement module, for those who will need access to the features there, they will need:

- **Loop: Comms Module**

How can I tell if people have signed up to Loop?

If you have never used the Me app or SSO, or anything that has populated the **External Identity** field in the user account, then you can see who has signed up to Loop by seeing how many accounts are now linked to an external identity.

The other option is to view your organisation page and the member count there. On connecting to your organisation, everyone will be automatically added as a follower of that page, so that should give an up-to-date count of all on Loop. **NB:** This count does require the overnight sync to update.

What if a user has forgotten their email address for their Loop account?

In HealthRoster, navigate to **Admin > User Accounts > User Accounts** and find the person's user account. Whichever email address is in the **External Identity** field of their account is the email address they used to sign up to Loop.

Can I block an account?

Yes. If you have the moderator feature access (**Loop: Moderator**) then you can block their entire account. This is found in the app itself. However, we would advise that you only use this in extreme circumstances as it blocks the entire account, including any connections made to other organisations. The better used option is to suspend their account in HealthRoster. This will immediately block their ability to perform any actions against the communications and rostering side and will then block their view of these actions after the overnight sync or if they log out and log back in again.

What happens when you suspend an account in HealthRoster?

Suspending an account in HealthRoster disconnects the account from the organisation in Loop. There are three stages to how this appears in Loop, dependent on sync etc.

Suspended Loop account immediately after the account has been suspended in HealthRoster

If users attempt to use their Loop account after an account has been suspended, the actions will all still exist in Loop but if the user attempts to perform any of these actions, they won't be able to. The next soft refresh of their roster will create a blank rostering screen.

If the user attempted to switch organisations via the rostering page, the organisation with the suspended account will be taken away from the list and if they have no other connected organisation available, they will be navigated to the rostering page with a screen that says they don't have access. The main action Loop page will have removed all rostering features.

Although they will still appear to have access to the groups and pages in that organisation, they will not be updated of any future posts in any of them and any admin rights they may have had previously will not be actionable.

Suspended Loop account after the overnight sync is performed

All groups and pages they were previously a part of, will now no longer show. Any content that had been posted against pages will no longer show on their newsfeed. Any connections that they have made will still show as you can take connections with you once you leave an organisation.

Please note that moderators with suspended accounts continue to be able to block someone until the overnight sync has been performed.

Suspended Loop account after the user has logged out and logged back in

On logging back in again, if the user is already connected to another organisation, this will become their view. If they aren't connected to any other organisation, they will be prompted to connect to an organisation before they are able to continue with any of the Loop features.

What's the best advice for users to continue to use their Loop account after their account has been suspended?

Log out and back in again. That is the best way to make sure that all changes are made in the quickest way possible. Second best option is to connect to your new organisation and switch to that view via the roster page.

Can you reactivate an account once it's been suspended?

Yes. The same way as you would with EmployeeOnline. By activating the account, it gives back all the access they had before it was suspended. In order for the user to see all the relevant details again, we recommend they log out and log back in again for the changes to take full effect.



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