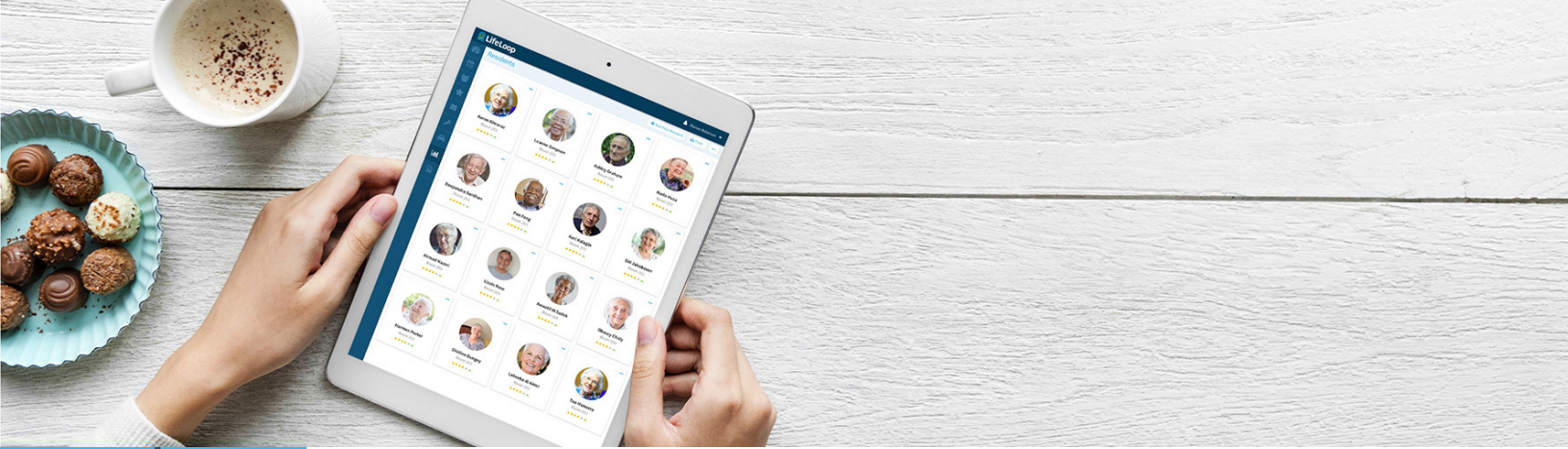




MANAGING STAFF LIST

How to add and remove staff in LifeLoop.



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MANAGING STAFF LIST

ADDING A STAFF MEMBER

STEP 1

Open Staff on your feature menu.

STEP 2

Click on **+ New Staff Member** on the top right-hand corner. This will open the Create Staff Form.

 Import

+ New Staff Member

STEP 3

Add in your staff members First Name, Last Name, Title, Date of Birth, Gender and Phone Number.

Edit Staff

[← back to Staff List](#)

Profile

Permissions

Notifications

Account



Change Image | v

First Name (required)

Jill

Last Name (required)

Doe

Title

Activity Director

Date of Birth

1982

x | v

May

x | v

6

x | v

Gender

Male

Female

Phone

111-111-1111

MANAGING STAFF LIST

ADDING A STAFF MEMBER

STEP 4

Assign a community or multiple communities for this staff member to have access to. Click on **Communities** and select the relevant communities for them.

Communities (required)

X Assisted Living

STEP 5

Assign this staff member to any groups. Click on **Choose Groups tags** and select from previously created groups or type in a new group you would like to create.

Groups

Choose group tags

STEP 6

Once you have created the staff profile, click the **Create User** on the bottom.

Create User

MANAGING STAFF LIST

ADDING A STAFF MEMBER

STEP 7

To set the permissions for this staff member, click on **Permissions** in the light blue menu.

Edit Staff

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Note: To learn more about staff permissions, visit the *Staff Management tab in our Learning Community*. The *Staff Permissions in Detail* and the *Staff Permissions by Role* documents will assist in properly setting the correct permissions for each staff member.

STEP 8

Each staff member can register and create their own password. To do so they must have either an email or cell number to receive a welcome email or welcome SMS text. To set up their account, go to **Account**.

Edit Staff

[← back to Staff List](#)

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MANAGING STAFF LIST

ADDING A STAFF MEMBER

STEP 9

Type in the staff members email address under Email.

Email

LifeLoop@LifeLoop.com

Note: Every user in LifeLoop requires either a unique username or a valid email address. An email address must be provided to send a Welcome Email.

STEP 10

Click **Save Account**. This will prompt a **Send Welcome Email** to appear under Save Account.

Save Account

Delete Staff



This staff member has not logged into LifeLoop yet. Send a welcome Email and they will be able to set their password and receive access to their specified communities.

Send Welcome Email

STEP 11

Click **Send Welcome Email** to send the staff member a welcome email to set up their account.

Note: If an email address is not provided and a phone number has been added to the profile, a "Send Welcome SMS" button will appear. You may send the staff member a text message to register for their account if they have already been provided their username. We recommend sending a welcome email over an SMS as they do not need to know their username ahead of time.

MANAGING STAFF LIST

REMOVING A STAFF MEMBER

STEP 1

Open Staff on your feature menu.

STEP 2

Locate and open the staff profile that you would like to remove from your staff list.

STEP 3

Once inside the staff profile, in the light blue menu, click on the **Account** tab.

Edit Staff

[← back to Staff List](#)

Profile

Permissions

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Account

STEP 4

Click on **Delete Staff** on the bottom right-hand side of the screen. This will remove the staff member from the staff list as well as remove their ability to access LifeLoop.

Delete Staff

MANAGING STAFF LIST

CONTINUED LEARNING



ATTEND A UNIVERSITY COURSE

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.



VISIT THE LEARNING COMMUNITY

Access LifeLoop marketing collateral and training resources at your convenience.

Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to <https://ourlifeloop.com/training/staff>.



FURTHER QUESTIONS?

Reach out to Support@OurLifeLoop.com or your Customer Relationship Specialist.