

Assign Users to Departments

Last Modified on 11/15/2021 1:39 pm EST

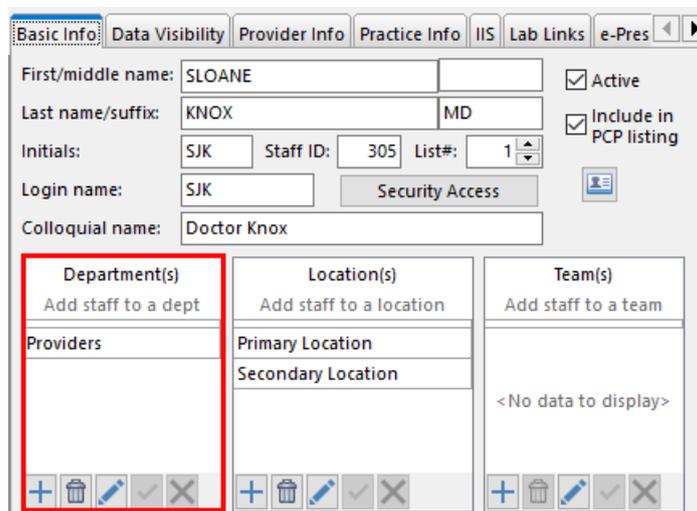
Version 14.19

Path: Practice Management tab > Staff/Providers

About

Staff members can be assigned to a department or multiple departments in the **Staff Directory**.

1. Navigate to the **Staff Directory** by following the path above.
2. Select the **staff member** in the Staff Name list on the left side of the window. Their information displays in the appropriate tabs on the right side of the window.
3. Click the **Basic Info** tab if not already selected.
4. Click the **Add** button  located in the Department(s) section of the window.



The screenshot shows the 'Basic Info' tab of the Staff Directory window. The 'Department(s)' section is highlighted with a red box. It contains a table with a header 'Department(s)' and a sub-header 'Add staff to a dept'. Below the header is a table with a 'Providers' column and a 'Save' button. The Location(s) and Team(s) sections are also visible.

5. Click the drop-down button  in the new entry line.
6. Select the appropriate department from the drop-down menu.
7. Click the **Save** button  within the Department(s) section.
8. *(Optional)* If you are adding a staff member into multiple departments, repeat steps 4 through 7.

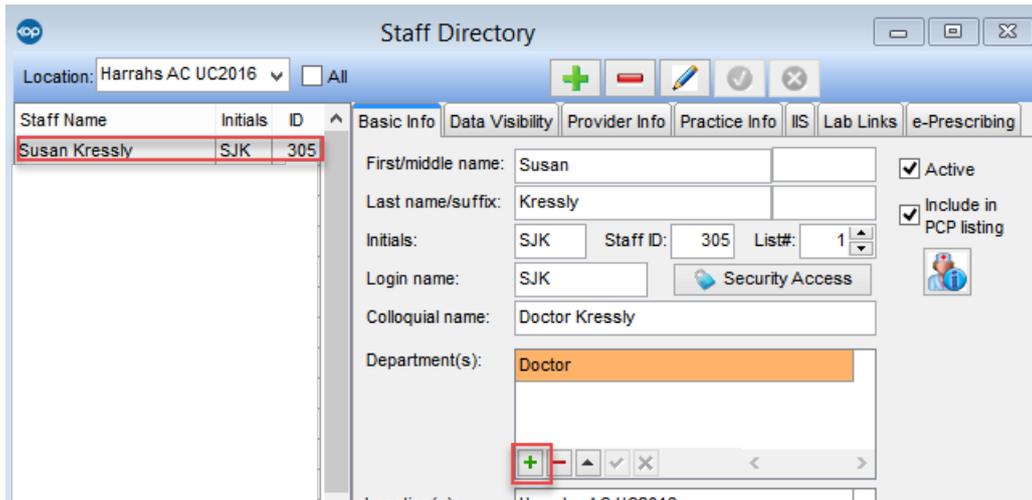
Version 14.10

Utilities > Manage Practice > Staff/Provider Directory

Overview

Staff members can be assigned to a department or multiple departments in the **Staff Directory**.

1. Click the **Utilities** button on the menu toolbar.
2. Select **Manage Practice**.
3. Select **Staff/Provider Directory**.
4. Select a staff member record to edit.
5. Click the **Basic Info** tab if not already selected.
6. Click the **Insert Record** button  in the Departments field.



Staff/Provider Directory: Staff Directory Window

7. Click the dropdown button  and select a department.
8. Click the **Post Edit** button .
9. (Optional) If you are adding a staff member into multiple departments, repeat steps 6 through 8.