

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.

Basic Info Data Vis	ibility	Provider Info	Practice	Info	IIS Lat	Links	e-Pres
First/middle name:	SLOANE						Active
Last name/suffix:	KNOX	(MD				Include in
Initials:	SJK	Staff ID:	305 List#:		1		PCP listing
Login name:	SJK		Security Access		ess		I
Colloquial name:	Docto	or Knox					
Department(s)		Location(s)			Team(s)		
Add staff to a dept		Add staff to a location			Add staff to a team		
Providers		Primary Location					
		Secondary Location					
					<no< th=""><th>data to</th><th>o display></th></no<>	data to	o display>
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- 5. Click the drop-down button \blacksquare 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.





Cocation: Harrahs AC U	C2016 🗸	•	All	Staff Directo	ory 🕂 🗕 🖊 🥑 😣	(
Staff Name Susan Kressly	Initials SJK	ID 305	^	Basic Info Data Vi First/middle name: Last name/suffix: Initials: Login name: Colloquial name: Department(s):	sibility Provider Info Practice Info IIS Susan Kressly SJK Staff ID: 305 List#: SJK Security Ar Doctor Kressly Doctor	Lab Lin	ks e-Prescribing ✓ Active ✓ Include in PCP listing ↓

Staff/Provider Directory: Staff Directory Window

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

