

# Assign Users to Location(s)

Last Modified on 10/20/2021 8:20 am EDT

Version 14.19

**Path: Practice Management tab > Staff/Providers**



## About

Each user added to OP must be assigned to at least one Location in the Staff Directory. While this controls several operations in OP, the most common are the user's ability to log into OP and the flow of Staff and Provider information to the Practice and Patient Portals. Users who work at different Practice Locations should be assigned to each Location so that their documentation is correct as they move between Locations.


**Note:** Users who work at multiple Locations will be asked the first time they log in each day which Location to use. When a user works at multiple Locations on the same day, that user must manually select the proper current location in the Location drop-down in the upper right-hand corner of OP. Changing and confirming the correct location is important for Vaccine documentation and ensuring vaccine doses are deducted correctly.



## Assign a User to Location(s)

1. Navigate to the Staff Directory by following the path above.
2. In the Staff Name column on the left side of the window, select a **staff member**. This list is determined by the Location selected in the Located field located at the top of the window. To display all users in the list, select the **All** checkbox.
3. In the Locations section of the Basic Info tab, click the **Add** button .
4. Click the **Add Record** button located within the Locations field.
5. Click in the blank field just below the Location(s) header, and use the drop-down to select the **Location**.
6. Click the **Save** button  to save your selection.
7. Repeat steps 4-6 to add additional Locations.

## Remove a User from Location(s)

1. Navigate to the Staff Directory by following the path above.
2. In the Staff Name column on the left side of the window, select a **staff member**. This list is determined by the Location selected in the Located field located at the top of the window. To display all users in the list, select the **All** checkbox.
3. In the Locations section of the Basic Info tab, select the **Location** to remove from the user.
4. Click the **Delete** button .
5. Click **OK** to confirm you want to delete the record.
6. Repeat steps 3-5 to remove additional Locations.

Version 14.10

**Utilities > Manage Practice > Staff/Provider Directory**

## Overview

In order for a user to be able to log into OP, they must be added to at least one location. Additionally, users who travel between locations must be added to **each work location**.

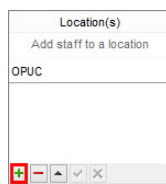
**Note:** Users who work at multiple locations will be asked the first time they log in each day which location to use. When a user works at multiple locations in the same day, that user must manually select the proper current location in the Location dropdown for Vaccine documentation purposes.

File Activities Reports Utilities Log In/Out Tools Window Help  PPE

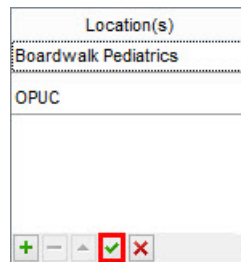
## Add Location(s) for a User

Follow the steps below to add a user to a Location.

1. Navigate to the **Staff/Provider Directory** using the path above.
2. Select a staff member from the list on the left pane of the window.
3. In their record on the right pane, locate the **Locations** field in the Basic Info tab.
4. Click the **Add Record** button located within the Locations field.



5. Select the Location from the dropdown.
6. Click the **Post Edit** button to save your selection.



7. (Optional) If you are adding a staff member into multiple locations, repeat steps 4 through 6.

## Remove a User from a Location

Follow the steps below to remove a user's access to a Location.

1. Navigate to the **Staff/Provider Directory** using the path above.
2. Select a staff member from the list on the left pane of the window.
3. In their record on the right pane, locate the Locations field.
4. Select the Location that should be removed.
5. Click the **Delete Record** button  within the Locations field. A confirmation window will appear asking if you would like to delete the location record. Click **OK**.