

Best Practice for Switching Facilities; (as of 11/5/20)

This should only be for clinical users, as it effects creating new notes or editing open notes from the scheduler or the patient lists.

The best practice is:

#1 - Make sure your default location is set up for where you work most of the time. This is setup in Clinic Administration as their “default” facility.

#2 - If after you log in on the Home page, if you are working in a location that is **different** the location you are logged into, go to the main hamburger and chose PATIENT which takes you to Patient Landing. Use the drop down to change the location to which you are now working.

#3 - Then navigate to Scheduler or Patient Lists

If the user wants to document in another location sometime later, then first, go to Patient Landing and change the location there and then proceed.

***** NOTE: Users cannot currently document in multiple locations at the same time, so if they have notes open for one location and they change to another location, they will get a message they have to check in the note from the current location first. They need to complete this before checking in the note.