

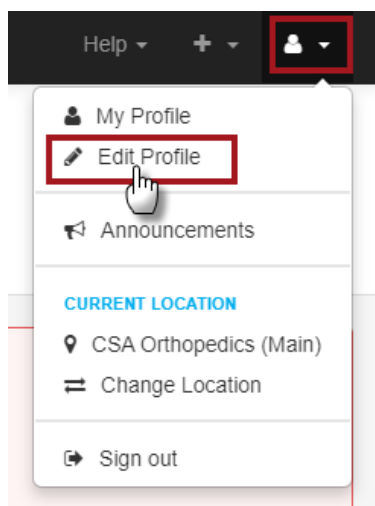
USER DEFAULT CLINIC LOCATION INSTRUCTIONS

Setting or Disabling Default Clinic Locations within the User Profile Page

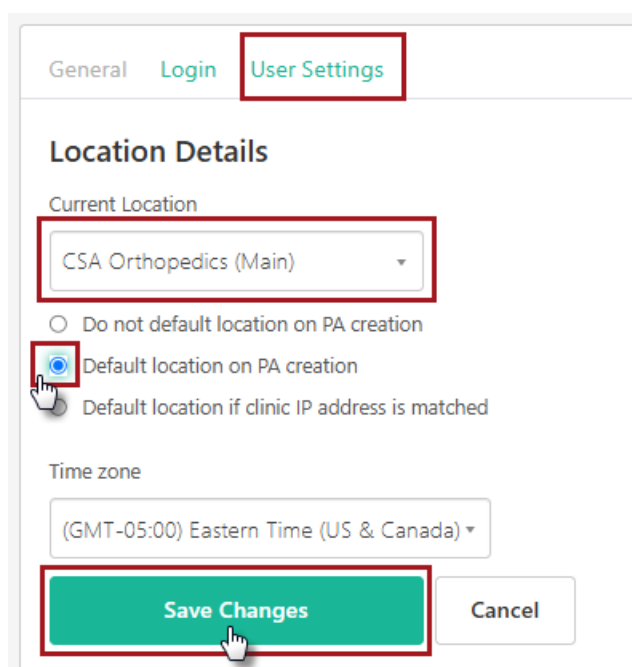
Functionality has been added to allow a user to set their profile to either Default to a specific Clinic Location or not Default to a specific Clinic Location when creating Patient Agreements. The below instructions walk through how to enable or disable the default Clinic Location.

Setting Default Clinic Location

Click the User icon in upper right and select Edit Profile link



In the Location Details section, select the Clinic Location that should default when creating a New Patient Agreement and click the Default location on PA creation button or ensure it's already selected and click Save button at bottom of page



General Login **User Settings**

Location Details

Current Location

CSA Orthopedics (Main) ▼

☐ Do not default location on PA creation

☒ Default location on PA creation

Default location if clinic IP address is matched

Time zone

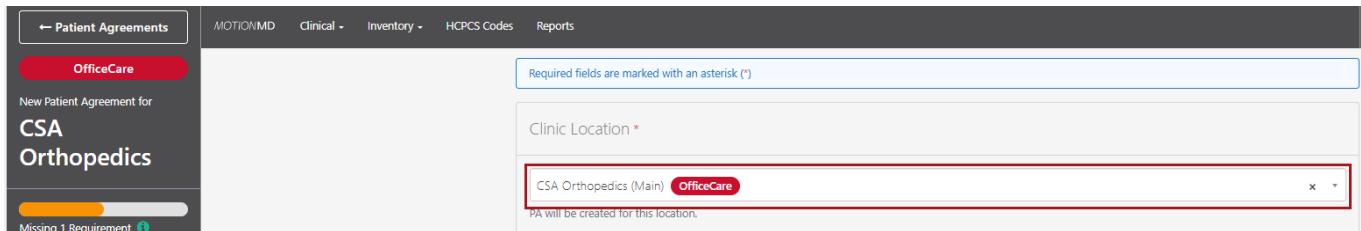
(GMT-05:00) Eastern Time (US & Canada) ▼

Save Changes Cancel

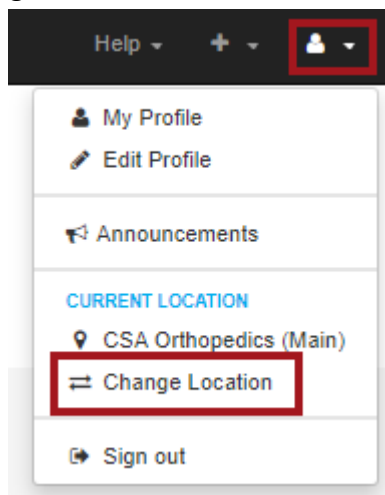
USER DEFAULT CLINIC LOCATION INSTRUCTIONS

Setting Default Clinic Location (Continued)

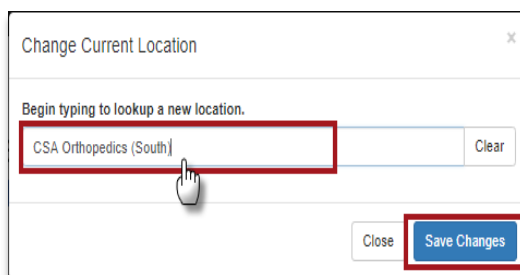
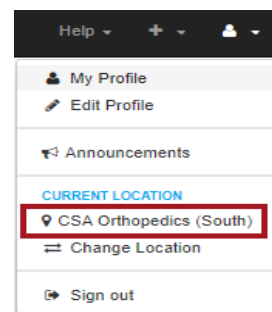
Setting a Default Location will allow the Clinic Location to be automatically set when a New Patient Agreement is created



Updating Default Clinic Location Shortcut – to quickly change a previously set Default Clinic Location, click the User icon in upper right and select Change Location under Current Location. The new location selected will be defaulted on New Patient Agreement page



In modal, start typing clinic location name, select it from dropdown and click Save Changes button. The Default Clinic Location will update under Current Location and when creating New Patient Agreements

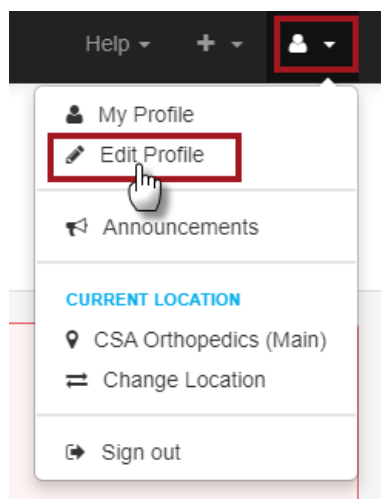



USER DEFAULT CLINIC LOCATION INSTRUCTIONS

Disabling Default Clinic Location

Disabling the Default Clinic Location should be done when a user is assigned to many clinics and wants to ensure the New Patient Agreement is created under the correct location and inventory is dispensed from correct location.

Click the User icon in upper right and select Edit Profile link



In the Locations Details section click the Do Not default location on PA creation button. There is no need to update or change Current Location clinic. Click the Save button at the bottom of the page

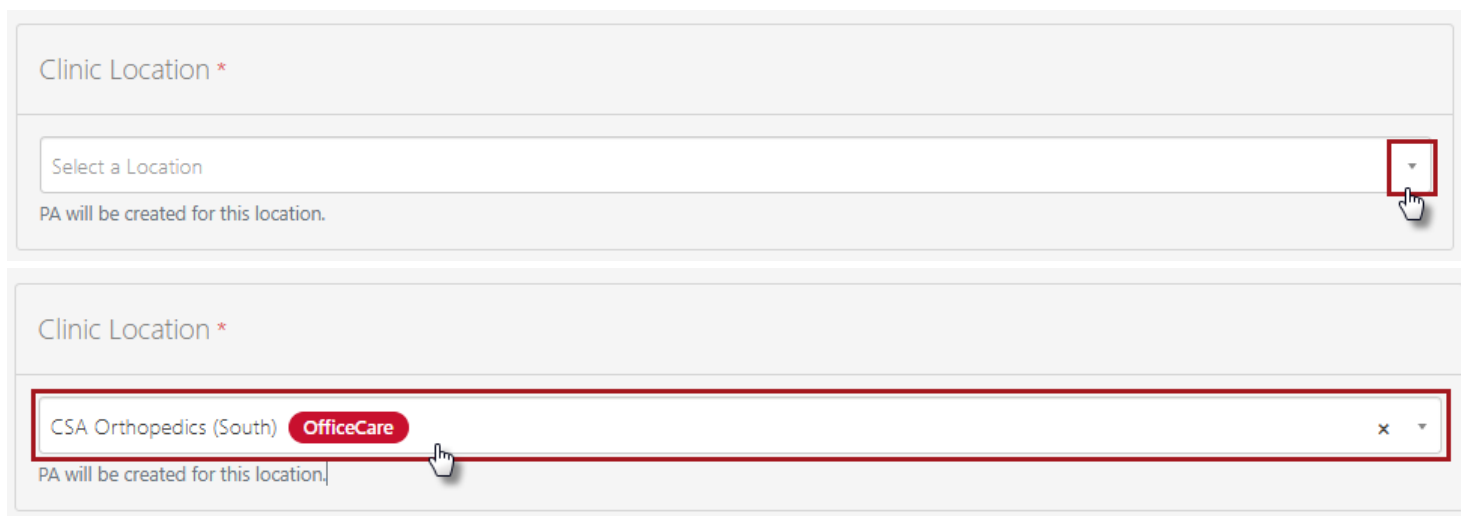
A screenshot of the 'User Settings' form. The 'User Settings' tab is selected and highlighted with a red box. Under the 'Location Details' section, the 'Current Location' dropdown is set to 'CSA Orthopedics (Main)' and is highlighted with a red box. Below it, the radio button for 'Do not default location on PA creation' is selected and highlighted with a red box. Other options are 'Default location on PA creation' and 'Default location if clinic IP address is matched'. The 'Time zone' dropdown is set to '(GMT-05:00) Eastern Time (US & Canada)'. At the bottom, the 'Save Changes' button is highlighted with a red box and a mouse cursor, with a 'Cancel' button next to it.

USER DEFAULT CLINIC LOCATION INSTRUCTIONS

Disabling Default Clinic Location (Continued)

Disabling Default Clinic Location will mandate a Clinic be selected from dropdown menu when creating a New Patient Agreement

On New Patient Agreement page, the Clinic Location will now be blank, click drop down and select Clinic Location the Patient Agreement will be created under



Clinic Location *

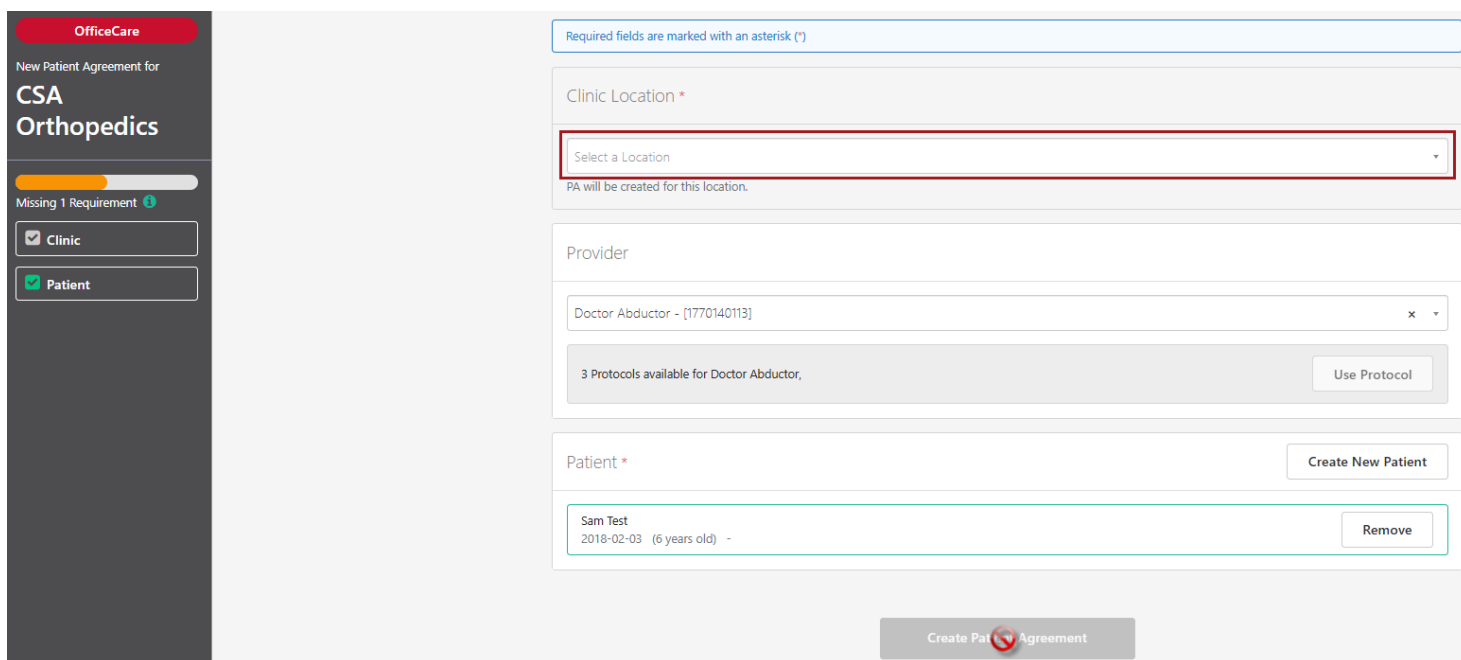
Select a Location

PA will be created for this location.

CSA Orthopedics (South) OfficeCare

PA will be created for this location.

The Create Patient Agreement button cannot be clicked until a Clinic Location is selected



OfficeCare

New Patient Agreement for
CSA Orthopedics

Missing 1 Requirement ⓘ

☒ Clinic

☒ Patient

Required fields are marked with an asterisk (*)

Clinic Location *

Select a Location

PA will be created for this location.

Provider

Doctor Abdutor - [1770140113]

3 Protocols available for Doctor Abdutor, Use Protocol

Patient *

Create New Patient

Sam Test
2018-02-03 (6 years old) - Remove

Create Patient Agreement