

Overview

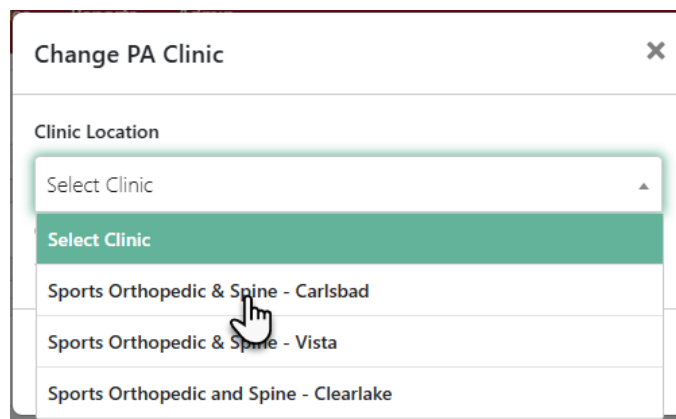
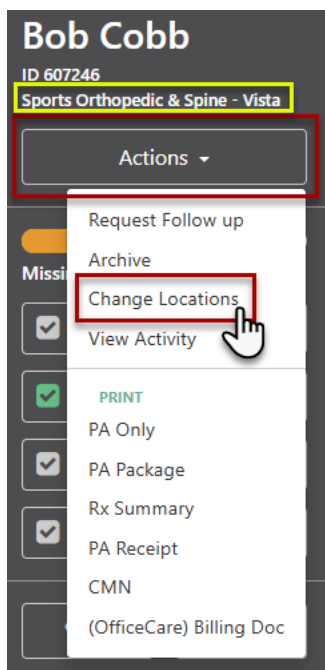
The clinic location on a Patient Agreement (PA) can now be updated without recreating it. Based on your role and product fulfillment status, the system will also update the associated inventory location and adjust inventory as needed. This helps correct mistakes when the wrong clinic is selected during creation.

Before you begin

- The feature will need to be enabled for your account, and you must have permission based on your role:
 - Any user can change location if no products are fulfilled – patient has not signed PA
 - The Admin role is required once the product is fulfilled – patient has signed PA
 - Some scenarios (like rentals or billing status) may restrict changes
- The PA must not be locked due to billing submission

Steps

1. Open the Patient Agreement -> Click Actions dropdown -> Select **Change Locations**
2. In modal, select the correct **Clinic Location** (no default is selected—you must choose one)
3. If required, select the correct **Inventory Location**
4. Click **Save** (enabled only after required selections are made).



UPDATE CLINIC & INVENTORY LOCATION ON PATIENT AGREEMENT

Change PA Clinic

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Clinic Location

Sports Orthopedic & Spine - Carlsbad

Only showing locations that have stock records for the following products.

Switching PA dispensing location. The following products will be impacted.



(01EF-M / DJO - Aircast)
AirSelect
Size: Medium

Fulfill from Stock
Sports Orthopedic & Spine - Carlsbad
Not Fulfilled

Close

Save Changes

Bob Cobb

ID 607246

Sports Orthopedic & Spine - Carlsbad

Actions

Change PA Clinic

×

Clinic Location

Sports Orthopedic & Spine - Carlsbad

Only showing locations that have stock records for the following products.

Switching PA dispensing location. The following products will be impacted.



(01EF-M / DJO - Aircast)
AirSelect
Size: Medium

Not Fulfilled

Fulfill from Stock

Carlsbad - Main Street

Carlsbad - Elm Street

Carlsbad - Main Street

Carlsbad - High Street
No stock record exists at this inventory location

What to expect

If no products are fulfilled:

- Available to all roles
- The Clinic Location updates
- No inventory changes occur

If one or more products are fulfilled:

- Restricted to Admin users only
- The Clinic and Inventory Locations update
- Inventory is automatically adjusted:
 - Deducted from the new location
 - Returned to the original location

For **Rental Product**:

- Change location flow is restricted due to a Rental Product being assigned to a specific Inventory Location

FAQ

- **Why is the Save button disabled?**
Required selection of the new Clinic Location or Inventory Location has not been made.
- **Why can't I change the location?**
The PA may include a rental product, have a restriction due to billing status, or exceed your role permissions.
- **Do I still need to archive and recreate a PA to fix location errors?**
No. You can now update the location directly when allowed or submit a Help Ticket requesting assistance from the Customer Success Team.