

# Allocate Staff to Location

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Once the Provider is active for appointments, you need to allocate them to the location(s) that you plan to book sessions at.

So if the provider had sessions at locations "Clintel Clinic" and "Clintel Rehab" then you would need to ensure that they are allocated to those locations.

## Allocate and Remove a Staff Member

1. Click **Administration**.
2. Select **Locations**.
3. For the selected location(s) click **Allocated Staff**.
4. Click **New**.
  - a. **Note:** To delete an existing allocation, click **Delete** for the appropriate staff member.
5. In the **Staff Member** field, select a staff member.
6. Click **Create Staff Allocation**.

The screenshot displays the 'Sacred Heart Hospital' system interface. At the top, a blue header bar contains the hospital name and a home icon. Below the header, a breadcrumb trail reads: 'Dashboard / Administration / Locations / Sacred Heart Hospital'. The main content area features a 'Staff Member' selection field with a dropdown menu open. The dropdown lists several staff members: 'Miss Train 1', 'Ms Giuseppe Beatty', 'Dr William Bill' (highlighted with a blue bar and a mouse cursor), 'Sheehan Brian', 'Clinic The Burswood Day Surgery', 'Dr Dominic Carlos', 'Mr Two Clintel', and 'Dr Percival Ulysses Cox'. To the left of the dropdown, there are two buttons: 'Create Staff Allocation' (blue) and 'Cancel' (white).

## From Provider Details Screen

This can also be accomplished via a Provider's details screen:

1. From **Dashboard**, select **Providers**.
2. Select a provider's name.
  - a. The Details screen appears.
3. Select **New** to allocate the provider to a location or select **Delete** to remove an existing allocation.

The screenshot shows the details page for Dr Percival Ulysses Cox. At the top, there's a blue header with the doctor's name and a toggle for 'ACTIVE' and 'DISABLED'. Below this is a white box titled 'Allocations'. Inside this box, there's a table with one row showing 'Sacred Heart Hospital' as the location. To the right of the location name are two buttons: 'New' and 'Delete'.

Location	
Sacred Heart Hospital	<button>New</button> <button>Delete</button>

## From Users → Staff Members Screen

1. In the Main Menu, click **Administration**.
2. Select **Users and Groups**.
3. Next, in the Main Menu, select **Staff Members**.
4. Select a staff member's name.
  - a. The Details screen appears.
5. Select **New** to allocate the staff member to a location or select **Delete** to remove an existing allocation.

The screenshot shows the details page for Dr Percival Ulysses Cox, accessed from the Staff Members screen. On the left is a sidebar menu with options: Dashboard, Administration, Users and Groups, Groups, Role Permissions, Staff Member Types, and Staff Members. The main content area has a blue header with the doctor's name and a toggle for 'ACTIVE', 'DISABLED', and 'SUPPORT'. Below this is a white box titled 'Allocations'. Inside this box, there's a table with one row showing 'Sacred Heart Hospital' as the location. To the right of the location name are two buttons: 'New' and 'Delete'.

Location	
Sacred Heart Hospital	<button>New</button> <button>Delete</button>