## **Restricting Staff Members to an Office**

07/24/2024 8:15 pm EDT

When you add a staff member to your account, you have the option to restrict them to an office or offices. You can edit this setting at any time for the staff members in your practice.

To start, go to Account > Staff Members.

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During the process of creating or editing a staff member's profile, check the **Restrict Offices** box. You can select one office or multiple offices to restrict the staff member to. To select multiple offices press and hold Command on a Mac and CTRL on a PC. Select **Save Staff Account** or **Create Staff Account**.

Edit Office Staf	f	Edit Office Staff						
First name Last name Primary Provider	Staff Training Dr. James Smith	First name Last name Primary Provider	Staff Training Dr. James Smith					
Email address Username Home phone Cell phone	trainingstaff@fake.com       trainingstaff       ()	Email address Username Home phone Cell phone	trainingstaff@fake.com trainingstaff () ()					
Send daily billing report? iPad unlock code Restrict offices? Use new dashboard?	<ul> <li>✓</li> <li>1234</li> <li>✓ Office 1</li> <li>Office 2</li> <li>Office 3</li> <li>Office 4</li> </ul>	Send daily billing report? iPad unlock code Restrict offices? Use new dashboard?	<ul> <li>✓</li> <li>1234</li> <li>✓ Office 1</li> <li>Office 2</li> <li>Office 3</li> <li>Office 4</li> </ul>					
	🖺 Save staff account		🖺 Save staff account					

When the staff member logs in, they will only be able to see the office they have been assigned to. In the example below, the staff member has been restricted to one office, so that is the only office the staff member can access.

dr chrono 🎍													🛔 Dr.	James	Smith 👻 🤱	Staff Traini	i <b>ng</b> (trainin	gstaff) Ů	
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Sample Doctor			10:00am																
<ul> <li>Dr. James Smith</li> <li>0</li> </ul>																			
Off	Offices Select all / none																		
Office 2				-															