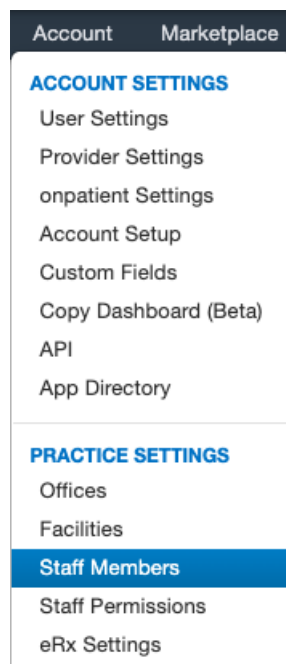


Restricting Staff Members to an Office

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**.



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 Staff

First name

Last name

Primary Provider

Email address

Username

Home phone

Cell phone

Send daily billing report?

iPad unlock code

Restrict offices?

- Office 1
- Office 2**
- Office 3
- Office 4

Use new dashboard?

Edit Office Staff

First name

Last name

Primary Provider

Email address

Username

Home phone

Cell phone

Send daily billing report?

iPad unlock code

Restrict offices?

- Office 1
- Office 2**
- Office 3
- Office 4

Use new dashboard?

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 Training (trainingstaff) ⚙

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Su	Mo	Tu	We	Th	Fr	Sa	Exam 1	Exam 2	Exam 3
26	27	28	29	30	31	1			
2	3	4	5	6	7	8			
9	10	11	12	13	14	15			
16	17	18	19	20	21	22			
23	24	25	26	27	28	29			
30	1	2	3	4	5	6			

Doctors Select all / none

- Sample Doctor
- Dr. James Smith 0

Offices Select all / none

- Office 2