

Location Configuration in Clinical: Location Setup

Last Modified on 11/21/2022 8:16 am EST


Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Location Configuration

About

Within Location Setup, you can add and edit locations for your Agency. Locations can also be deleted if no forms, clients, users, groups or programs exist under the location. Forms can also be linked and unlinked for a location.

Add a Location

1. Navigate to Location Setup by following the path above.
2. Click the **New** button.

Location Setup								
Location Addr. Label Name	Display Name	Addr. Ln 1	Addr. Ln 2	City	State	ZIP	#	
 Full Company Name	Short Name	PlaceHolder		PlaceHolder	Michigan	48307		Edit

3. Within the Location Setup window, fill in the fields as necessary for your agency. The following fields are required and are marked with an asterisk: **Location Address Label Name, Address Line 1, City, State, Zip, Phone, Time Zone** and **Display Name**.

Location Setup
✕

Location Information

Location Address Label Name:*

Address Line 1:*

Address Line 2:

City:*

State:*

ZIP:*

Phone:*

Fax:

Time Zone:*

Display Name:*
The Display Name should be a short and unique name for the Location that identifies the user's current Location.

External Alias:

IBHRS provider:

Non-Person Location:

Region:

District:

Organization's Main Location?:
This Location will be used as the Organization's address.

Billing Configuration

Agency:

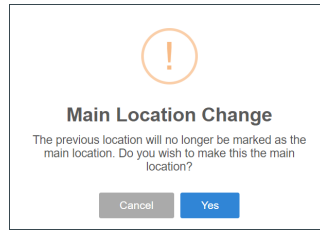
Facility:

Update Cancel

4. (Optional) Complete the remaining fields:

- Address Line 2
- Fax
- External Alias: If your practice has an external interface, this links the location to the location in the other system.
- Non-Person Location
- Region: Typically used for reporting purposes.
- District: Typically used for reporting purposes.
- Organization's Main Location?: Select the checkbox to use this location as the Organization's address. If a different

location was previously selected, a Main Location Change dialog box displays. Click the Yes button to mark the location as the main location or Cancel to make no change.



- Billing Configuration - Agency: [Links to an agency](#) that was created within the Billing Engine.
- Billing Configuration - Facility: [Links to a facility](#) that was created in the Billing Engine. You can also type in this field and if the facility does not exist in the Billing Engine, it will be created in the Billing Engine.

5. Click the **Add** button.

Edit a Location

1. Navigate to Location Setup by following the path above.
2. Click the **Edit** button next to the location you want to make changes to.


Location Setup								
Location Addr. Label Name	Display Name	Addr. Ln 1	Addr. Ln 2	City	State	ZIP	#	
 Full Company Name	Short Name	Placeholder		Placeholder	Michigan	48307		Edit

3. Make changes as necessary, and click the **Update** button.

Delete a Location


If a location is not linked to forms, clients, users, groups, or programs, a Delete button is available.

1. Navigate to Location Setup by following the path above.
2. Click the **Delete** button next to the location you want to delete.

Location Setup								
Location Addr. Label Name	Display Name	Addr. Ln 1	Addr. Ln 2	City	State	ZIP	#	
 Test	Test 1 Location	111 Briar Drive		Horsham	Pennsylvania	19044		Edit Delete

3. A pop-up displays, "Are you sure you want to delete this location?", click **OK**.

Link or Unlink Forms for a Location

1. Navigate to Location Setup by following the path above.
2. Select the **Gear** button  next to a location.
3. The FORMS IN USE AT THIS LOCATION section displays. Any forms in use will be highlighted in orange and have the first column checkbox selected. You will also see if the form is checked as being Date of Service Friendly?, Billing Friendly?, and Shown in Client Portal?, which are all options that can be set for forms within the Form Builder. These fields cannot be edited from this window.
4. To link a form for the location, select the **first** checkbox. The row is highlighted in orange. To unlink a form for the location, deselect the **first** checkbox.

FORMS IN USE AT THIS LOCATION			
<input type="checkbox"/> Form Name	Date of Service Friendly?	Billing Friendly?	Shown in Client Portal?
ASAM Forms			
<input checked="" type="checkbox"/> SDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Forms			
<input type="checkbox"/> AssessmentFormForReq	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Note: Use the Search Panel button  to search for a specific form within the list.

5. Click the **Save** button to save your changes.