

UPDATE CLINIC & INVENTORY LOCATION ON PATIENT AGREEMENT

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
 - Additional permissions are required once the product is fulfilled – patient has signed PA
- 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. Click **Save** (enabled only after required selections are made).

The image illustrates the process of updating a clinic location on a Patient Agreement (PA) for a patient named Bob Cobb (ID 607246). The patient's current location is "Sports Orthopedic & Spine - Vista".

Step 1: The user opens the "Actions" dropdown menu and selects "Change Locations".

Step 2: The "Change PA Clinic" modal is displayed, showing a list of available clinic locations. The user selects "Sports Orthopedic & Spine - Carlsbad".

Step 3: The "Change PA Clinic" modal is shown again, confirming the selection of "Sports Orthopedic & Spine - Carlsbad". The "Save Changes" button is highlighted, indicating that the changes can be saved.

The final state shows the patient's location updated to "Sports Orthopedic & Spine - Carlsbad".

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What to expect

If **no products** are fulfilled:

- The Clinic Location updates
- No inventory changes occur

If **one or more products** are fulfilled:

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

For **Drop Ship To The Clinic Address**:

- Not fulfilled -> all users can update
- Fulfilled, not ready for billing -> Admin or Super Admin only -> Submit Help Ticket requesting assistance

For **Drop Ship To The Patient's Address**:

- Standard rules apply

FAQ

- **Why is the Save button disabled?**
Required selection of the new Clinic 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 Help Ticket requesting assistance from the Customer Success Team.