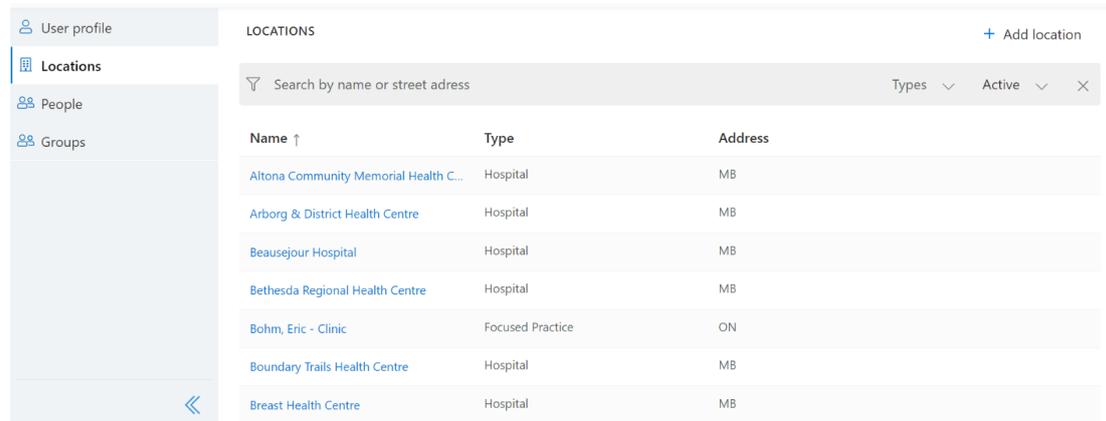


Location Management

Rachel Carmickle - 2024-05-16 - [Identity Management V2 \(NEW\)](#)

Locations are used to define the steps and permissions required for a referral pathway. They are not necessarily a single physical location; they can also be defined as the program/service provider that is responsible for a step in the workflow. As described above, a location could be the office of a family physician who sends in referrals by fax. A location could be the office of a specialist who receives referrals. A location could be a diabetes service within a community health clinic.

Select Locations in the navigation pane to see a list of all locations.

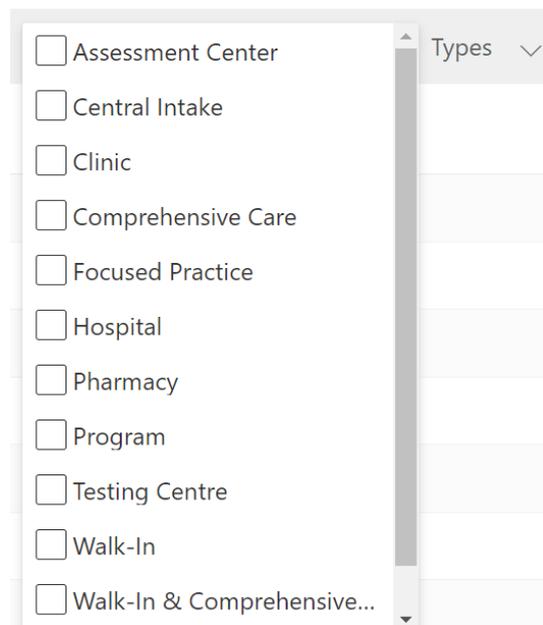


The screenshot shows the 'Locations' management interface. On the left is a navigation pane with options: User profile, Locations (selected), People, and Groups. The main area is titled 'LOCATIONS' and includes a '+ Add location' button. Below the title is a search bar 'Search by name or street address' and filter buttons for 'Types', 'Active', and a clear filter 'X'. A table lists the following locations:

Name ↑	Type	Address
Altona Community Memorial Health C...	Hospital	MB
Arborg & District Health Centre	Hospital	MB
Beausejour Hospital	Hospital	MB
Bethesda Regional Health Centre	Hospital	MB
Bohm, Eric - Clinic	Focused Practice	ON
Boundary Trails Health Centre	Hospital	MB
Breast Health Centre	Hospital	MB

You can search for a location by name or street address.

You can filter the list of locations by Type. Select one or more location types from the list of types.



The screenshot shows the 'Types' filter dropdown menu. It contains a list of location types, each with an unchecked checkbox:

- Assessment Center
- Central Intake
- Clinic
- Comprehensive Care
- Focused Practice
- Hospital
- Pharmacy
- Program
- Testing Centre
- Walk-In
- Walk-In & Comprehensive...

You can filter the list to see only Active or Inactive locations. By default, the list of locations is filtered to display the active ones.

Clear the filters you added by selecting the X in the filter bar.

You can sort the list of location by selecting the Name column heading. By default, the list is sorted in A-Z alphabetical order. Select the Name column heading to change the sort order to Z-A. Select the Name column heading to revert to A-Z sort order.

Add a Location



It is recommended that you do a search for the location to ensure no duplication of users. Search both Active and Inactive locations.

There are three steps to adding a location:

1. Add the location.
2. Select the service type(s) and receiving type(s).
3. Add people to the location.

To add a location, select **Add location**:

- Enter the location name.
- Select the type of location.
- Select a province.
 - This is a predefined list of Canadian provinces and territories, American states, Australian states and territories, and New Zealand's regions.
- Select a time zone.
- Select **Add Location**.

In the Settings section, specify the service types or receiving types.

- This location's service types indicate which requisitions can be routed to it. This setting is only relevant when routing by service type (not requisition type).
 - Select as many service types as required for the location.
- This location's receiving types indicate which requisitions can be routed to it. This setting is only relevant when routing by requisition type (not service type).
 - Select as many receiving types as required for the location.

Send to ATC

- For pathways with integration setup between Novari eRequest and Novari ATC (surgical pathways) the Send to ATC needs to be turned on for the receiving location(s). This allows the "Send to ATC" button to appear on requisitions that have been setup with this integration. The requisition can be sent to Novari ATC Surgeons Unlisted Case Inbox for adding to the surgical waitlist in Novari ATC.
- If there is a list of Novari ATC clients, these clients were set up during your organization's implementation phase depending on the organization's needs.
- If no Novari ATC clients are listed or the desired Novari ATC is not listed, use Default.
- Select Update Novari ATC Integration.

The screenshot shows the 'Manage Novari ATC Integration' dialog box in the Novari Identity Management system. The dialog box is titled 'Manage Novari ATC Integration' and has a close button (X) in the top right corner. Below the title, there is a descriptive text: 'When applicable, specify the client to use for the Novari ATC integration. Use the default value if the desired Novari ATC client is not listed.' Underneath this text is a dropdown menu labeled 'Novari ATC clients' with 'Default' selected. At the bottom of the dialog box, there are two buttons: 'Update Novari ATC Integration' (in blue) and 'Cancel'.

Edit A Location

To edit an existing location, select its name in the Locations list.

LOCATIONS > TEST SURGEON OFFICE

- [Details](#)
- [Settings](#)
- [People](#)

The screenshot shows the 'Details' and 'Settings' sections for the 'TEST SURGEON OFFICE' location. The 'Details' section has a 'Deactivate' button in the top right corner. It contains the following information:

Name	Test Surgeon Office	>
Type	Other	>
Timezone	(UTC-05:00) Eastern Time (US & Canada)	>
Address	ON	>

The 'Settings' section contains the following information:

Service types	Gynecology, Neurosurgery, Ophthalmology, Oral Surgery	>
Receiving types	-	>

Deactivate a Location

You can deactivate a location; however, you need to be careful because deactivating a location could negatively affect the pathway.

The screenshot shows the 'Deactivate Location' dialog box. The title is 'Deactivate Location' and there is a close button (X) in the top right corner. The main text reads: 'Deactivating this location will remove it from future use in any Novari Access to Care Platform™ application. This action can be reversed at any time.' At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Deactivate' (in red).

To deactivate a location, select Deactivate and then confirm the deactivation in the Deactivate Location dialog. If you accidentally deactivated a location, you can activate it again.