Room Assignment Setup

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Room Setup

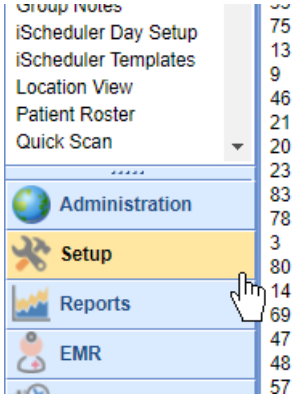
The Room Setup tab is used to determine which rooms exist at a practice so that a patient can be assigned to a room in the EMR.

The list of rooms is customized for your practice. This article will explain how to add new rooms to the application along with the associated features available.

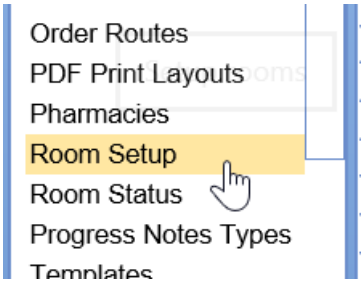
Add a New Room

To add a new room the application, follow these steps:

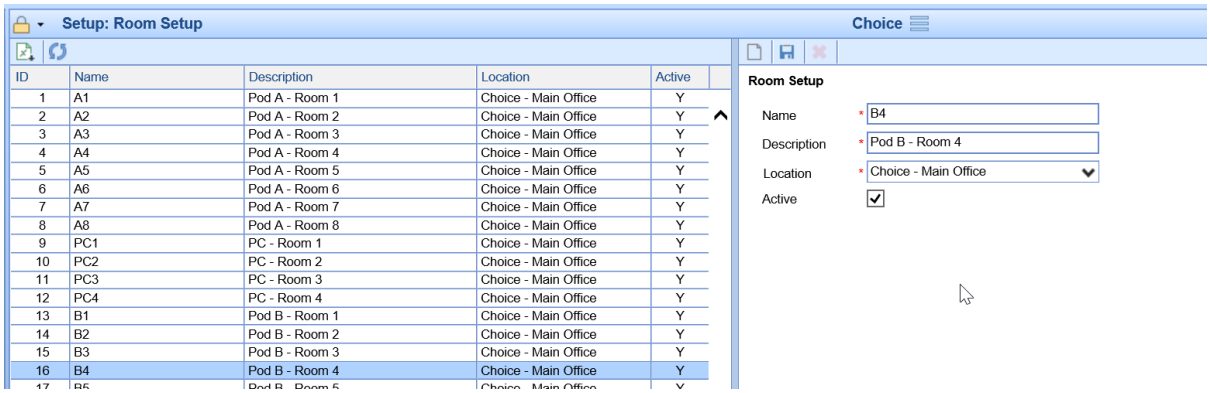
1. Open the **Setup** portal



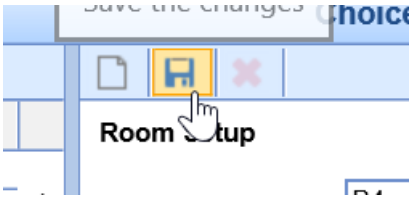
2. Select **Room Setup** from the setup list under the EMR Setup section.



3. Enter the Room details in the work area on the right



4. Click **Save**



Room Setup Values

There are several settings and values related to a room that determines when a room can be selected and how it displays.

Value	Example	How it is used
Name	Room 3	The name of the room.
Description	Room 3 - Pod B	A more descriptive name of the room.
Location	South Office	This produces a list of service location where appointments can be scheduled. When a patient is scheduled a specific location, the list of rooms will be filtered by this.
Color	Light Red	Used to define how appointments show up in iScheduler. The following settings may be used: • User Setting: EMR Primary Appointment Color (Background) • User Setting: EMR Secondary Appointment Color (Right Side Bar)

Room Assignment Troubleshooting

Which Rooms Appear in the List

When you assign a patient to a room, the **Assignment** drop-down shows a filtered list of rooms, not every room set up for the practice. This article explains how that list is built, why a room may be missing, and how to fix it.

Before you start: Rooms are created and tied to locations in **Setup > EMR Setup > Room Setup**. See Room Assignment Setup.

How the room list is built

The rooms you can pick depend on the **service location** on the patient's appointment:

If the appointment...	The Assignment list shows
Has a service location	Only **active** rooms whose **Location** matches the appointment's service location.
Has no service location	All **active** rooms for the practice.

In both cases, the room the patient is **currently** assigned to is always included, even if it would otherwise be filtered out.

> **Not user-specific:** The room list is **not** filtered by user, role, or security settings. Two users opening the same appointment see the same rooms. If one user sees fewer rooms, they are usually working appointments at a different location.

Common reasons a room is missing

- **Room is tied to a different location**: the room's **Location** in Room Setup doesn't match the appointment's service location.
- **Room has no location**: rooms with a blank Location appear only for appointments that have **no** service location.
- **Room is inactive**: inactive rooms never appear in the list.
- **Location has only one room set up**: the list shows that one room, plus the patient's current room if it's different.
- **Location has no rooms set up**: the list is empty, or shows only the patient's current room.

Troubleshoot a missing room

Step 1: Check the appointment's location

1. Note the patient and appointment where the room is missing.
2. Open the appointment and confirm which **service location** it is scheduled at.

Step 2: Check Room Setup for that location

1. Open the **Setup** portal.
2. Select **Room Setup** under the **EMR Setup** section.
3. Review each room you expect to see. Confirm that:
    - its **Location** matches the appointment's service location.
    - the room is **active**.

Step 3: Compare with another user (optional)

Ask a second user to open the **same appointment**. If they see the same short list, the cause is Room Setup, not the user.

Step 4: Fix and re-check

1. Update the room's **Location** or make it active, then click **Save**.

2. Close and reopen the Room Assignment window for the patient. The room should now appear.

Tip: If a room is shared across locations, set it up once per location so it appears for appointments at each one.

Security and the Room Assignment window

Security controls whether a user can **change** a room assignment, not **which** rooms they see.

Access level	What the user can do
View only	Sees the patient's current room, room status, and chief complaint. The **Assignment**, **Status**, and **Chief Complaint** fields and the **Save** button are disabled.
Update	Can pick a room, change the room status, edit the chief complaint, and save.

Can't select anything at all? If the drop-down is greyed out, the user has view-only access to the Room Assignment screen. Review their access in the **Privilege Check** screen.