Linked Accounts in Multiple Practice Groups (Mobile)

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Overview

- Providers who work across multiple practice groups can conveniently access all of their accounts through a single login. Once the accounts are linked, switching between practice groups is simple and seamless—eliminating the need to manage multiple logins.
- Before requesting to have accounts linked, providers must choose which practice group account they wish to use as their **primary login**. This will be the account used to access all associated practice group profiles.
- To proceed with linking accounts, please ensure you have identified your preferred primary account before submitting a support case.
- Make sure the "Use iPad EHR" permission is enabled in your web account settings. This permission must be active to access and switch between accounts on the iPad app.

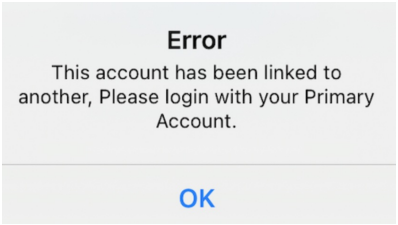
Link or unlink accounts

To link or unlink accounts, create a support case.

Emails are sent to the primary and linked account to notify you that both accounts are linked.

Access linked accounts

To access any linked accounts, you must first log in using your **primary account**. You **cannot** log in directly to a **linked (secondary) account,** doing so will result in an error message.



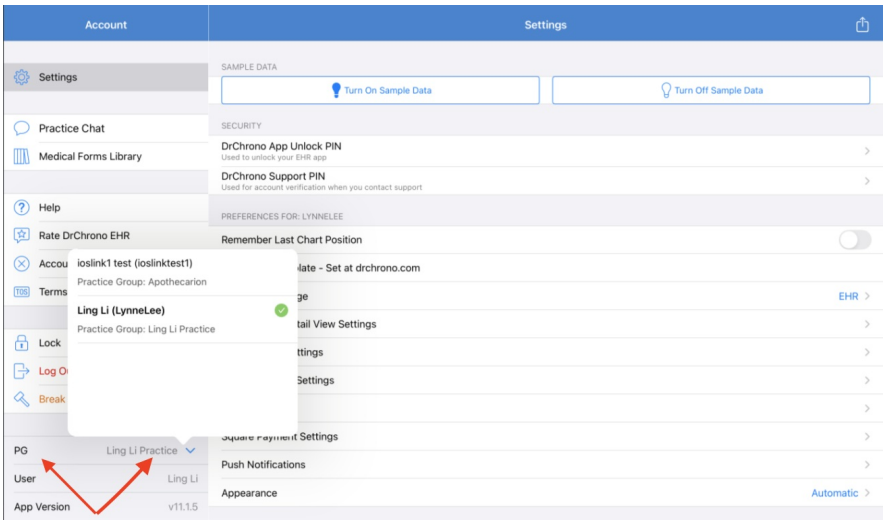
Once you're logged in to your primary account, you can switch to any linked accounts.

- If your session in a linked (secondary) account times out, you will need to:
  - Log in again using your **primary account credentials**.
  - Once logged in, switch back to your **linked (secondary) account**.
- If you switch to a linked account and then move the app to the background, you will need to:
  - Re-authenticate using your primary account credentials (username and password or SSO) when returning.
  - Once logged in, switch back to your **linked (secondary) account**.

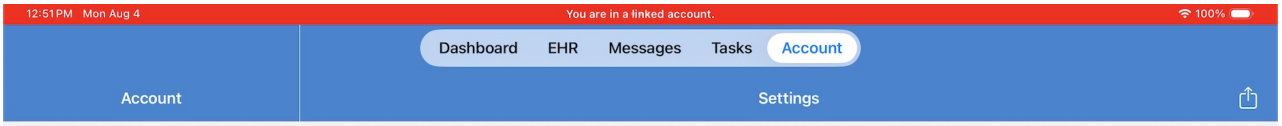
Steps to Switch Accounts

- **Open the iPad EHR app** and log in using your **primary account** credentials.
- Tap **Account** located in the **bottom-right corner** of the menu bar, (or top menu bar for iOS 18.0 or later).

- In the **left-hand sidebar**, tap the **primary account header (PG field)** to open the account dropdown.
- From the list of linked accounts, **select the account you want to switch to**.
    - The primary account appears at the top and the linked accounts appear underneath



Once you switch to a linked account, a message appears across the top of the page that says you are in a linked account.



Linked Accounts: Mobile vs. Web Access

When managing linked accounts across multiple practice groups, there are a few important differences between the **iPad (mobile)** and **web** platforms to keep in mind:

Feature	Mobile	Web
Permission Settings	Requires the **"Use iPad EHR"** permission to be enabled in the web account settings.	No special permission required for accessing linked accounts.
Access Linked Accounts	Access from **Account** (bottom-right corner) > **Account Settings** > tap the **primary account header** in the sidebar.	Access from the **Account Header** at the **top of the page**—click to view and switch between linked accounts.
Account Header Display	Linked accounts are visible within **Account Settings** in the **Practice Group** field located in the sidebar menu.	The **Practice Group**, **Provider Name**, and **Primary Account** are shown together in the **Account Header** at the top of the page.

Audit Log	Actions are not recorded in the audit log.	The following actions are logged in the **Audit Log**. • When accounts have been linked • When you access linked accounts • Work done in the linked accounts is logged as done by the linked account user and not by the primary account user

Learn more about Linked Accounts in Multiple Practices Groups (Web)