Move a Facility from One Organization to Another

These instructions detail how to move a facility from one organization to another within IWeb. The user must have the Registry Settings permission to perform these steps.

Notes:

1. A placeholder facility must be created first, then the moving facility will be merged into it.

2. If the facility being moved is the only facility in that organization, the organization will be eliminated (deactivated).

3. If the facility being moved provides data through a DTT or HL7 import, the move should be evaluated to determine what impact it will have on imports. DTT and HL7 settings are not automatically transferred during the move, so they must be manually recreated in the new (moved) facility.

Steps to Create the Placeholder Facility:

1. Click the **Facilities > Search/Add** menu link. The Facility Maintenance page opens.

2. In the search parameters section at the top, select the organization to which the facility is being moved, then enter the facility's name in the Facility field and click **Search**. This is to make sure the facility does not already existing in the organization.

3. If the facility appears in the search results list, re-evaluate your need to move/merge the facility because it already exists within the organization. If the facility does not appear in the search results list, click **Add**. The Facility Maintenance Update page opens with the facility name and organization prepopulated. If necessary, enter information into any other required fields, then click **Save**.

Steps to Merge the Facility:

1. Click the **Administration** menu link. On the Administration Main Menu page, under the Settings section, click the **Organization (IRMS)/Facility Merges** link. The Organization (IRMS) / Facility Merge page opens.

2. Enter the required information and click **Evaluate Changes**. The fields are:

   - **Eliminate:**
     - **Organization (IRMS)** – Select the organization that the facility is currently under
     - **Facility / Do Not Limit** – Select the facility to be moved from the drop-down list.

   - **Merge to:**
     - **Organization (IRMS**) – Select the organization to which the facility is being moved
     - **Facility / Do Not Limit** – Select the placeholder facility from the drop-down list.

3. After the **Evaluate Changes** button is clicked, the Lot Conflicts for Active Lots page opens, listing any potential conflicts. The number of patients, vaccinations, lots, and users that will be merged are listed at the top of the page. Review the patient and vaccination counts to make sure the results are logical. Copy the lot conflicts (if any) to another file or print the page so that the lots for the facility being moved can be inactivated via the Lot Numbers – Reconciliation option.

4. Return to the Organization (IRMS) / Facility Merge page (**Administration > Settings > Organization (IRMS)/Facility Merges**). Reselect the same options (organizations and facility) and click **Evaluate Changes** again. Make sure the lot conflicts list is empty, again review the patient and vaccination counts to make sure the results are logical, and click **Merge**. A message appears at the top of the page stating that a merge job has been scheduled. The job can be monitored on the Current Jobs page (click **Job Queue** on the menu).

5. Once the job has completed, reconcile the inventory in the moved (new) facility as necessary.