Adding a Flag to a Patient

07/24/2024 12:14 pm EDT

Patient flags are a tool that can be customized to note and report attributes of:

- A patient: Balance unpaid, special care needs, can/cannot receive treatment, needs special paperwork, etc.
- An appointment: Requires follow-up visit, lab results needed, actions required pre or post-appointment, etc.

They can also be used to communicate to your staff the actions or characteristics of a patient or appointment and will appear whenever the patient or appointment is opened. Think of it as a yellow sticky note on a patient's chart.

Flags also may be used to generate reports, which can give you insights into your patients and/or appointments.

1. To add a patient flag to a patient, first, bring up the patient's chart by going to **Patients > Patient List** or searching for the patient.

Sc	hedu	ıle	Clir	nical	Patients Reports	Billin	g Accour	nt Help	\$ X							Search		
					PATIENT									-				_
0	Ju	I	× 2	2020	Patient List	oday	2 Refresh	Print Appts	s		€¶ J	ul 19 2020 - Jul 25	₩			Daily Exam Roc	ms	Doctor V
Su	Мо	Tu	We	Th	Consent Forms Patient Flags	Sun 7/	/19 ×	Mon 7/2	20 ×	Tue 7/21	×	Wed 7/22	×	Thu 7/23	×	Fri 7/24	×	Sat
28	29	30	1	2	Patient Groups													
5	6	7	8	9	Send Email													
12	13	14	15	16	Send Referral													

2. Ensure **Demographics** is selected on the left. Navigate to the **Flags** tab and select +Add Flag.

Add now pation	*											
	it.		Jenny (HAJE000001						
Demographics	-		Phone:	(844) 569-8628 Email: Missing		Date Added:	Nov. 3, 2020					
Appointments		VIII -		Mountain View , CA 940	40	Next Scheduled Appt:	Monoull II, Loci					
Clinical Dashboard												
Documents	ocuments											
Eligibility	Primary Provider: James Smith											
Tasks	0	New Referra	Fax Demographics	Print Demographics				Vitals	+ Schedule N	New Appointment		
Problem List	9	Important	Demographics Insurance	ces Authorizations	Smoking Status	Flags Balance	onpatient Payments					
Medication List	6	Cufficient n	ationt domographics to bi	llinguranee								
Send eRx		• Sumcient p	atient demographics to bi	il insurance.								
Allergy List	4	Patient Flag	js						St	now Archived Flags		
Drug Interactions	6	Туре	Description	Арроі	ntment	Date	Updated by					
CQMs										+ Add Flag		
Intake Data												
Lab Orders	Lab Orders Save Demographics											

3. To add a few flags, use the dropdown menu to select from your existing flags. You can just add a description, but it isn't required. This description will display in the patient flag as unbolded text. When complete, select **Save** or **Save** and **Add Another**.

New Patient Flag

Flag Type	Needs Authorization	~	•
Description	Needs prior auth for procedure of 1/31.	in //	
	S	ave	Save and Add Another

4. The flag will be added to your patient's list of flags which will be displayed on the patient's chart and all appointments the patient schedules. Click **Save Demographics** when finished.

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+ Add new patient		Jenny (Jen) Harris (Female 40 years of	d Feb 11 1980)		HAJE000001			
Demographics Appointments Clinical Dashboard		Phone: (844) 569-6628 Email: Missing Address: 1001 N Rengstorff Ave Mountain View, CA 94040 CDS: Adult Immunization Schedule Age: 27-4	Date A Last Scheduled Next Scheduled	Added: Nov. 3, 2020 d Appt: Mon Jan 11, 2021 d Appt:					
Documents Eligibility	onpatient access enable Primary Provider: Jan	nes Smith							
Tasks 0	New Referral Fax Demo	graphics Arint Demographics			Vitals + Sched	ule New Appointment			
Problem List 9	Important Demographics	Insurances Authorizations Smoking Status	Flags Balar	nce onpatient Payments					
Medication List 5	on List								
Send eRx						Chaus Archived Elege			
Allergy List	Patient Flags					Show Archived Flags			
Drug Interactions 6	Туре	Description	Appointment	Date	Updated by				
CQMs	Needs Authorization	Needs prior auth for procedure on 1/31.		2021-01-12 12:26:20	Brendan Wilberton	Edit Archive			
Intake Data						+ Add Flag			
Lab Orders		Save Demographics							
Immunizations									