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.
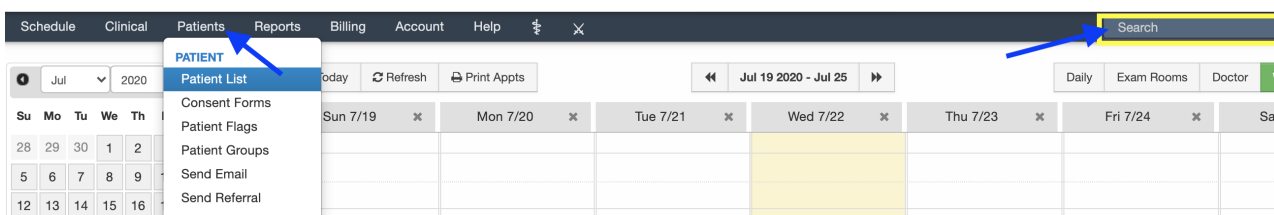
2. Ensure **Demographics** is selected on the left. Navigate to the **Flags** tab and select **+Add Flag**.
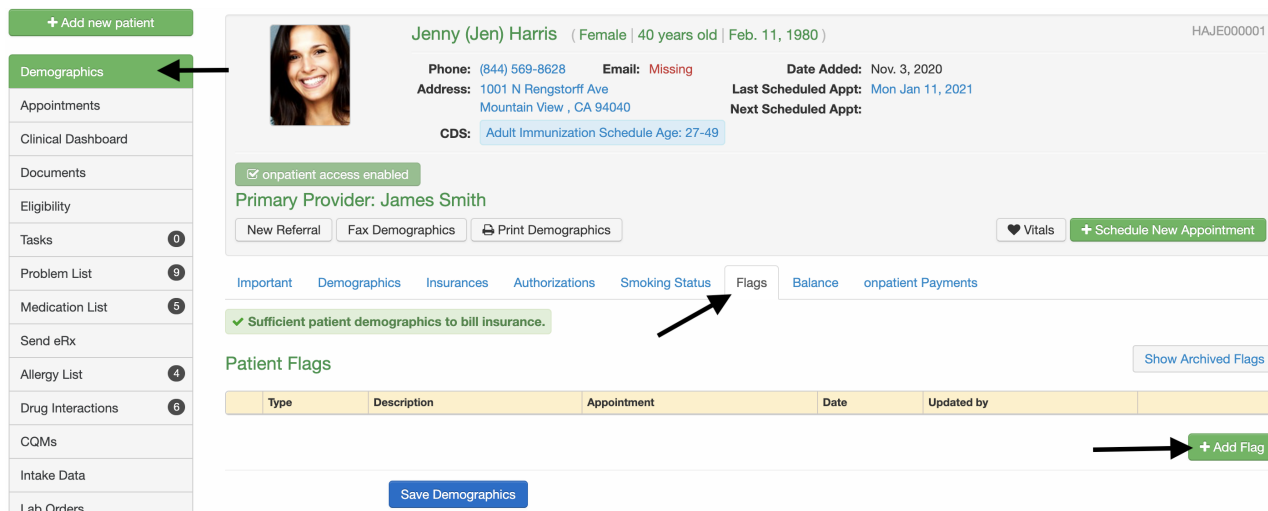
3. To add a few flags, use the dropdown menu to select from your existing flags. You can just add a description, but it isn't required. This description will display in the patient flag as unbolded text. When complete, select **Save** or **Save and Add Another**.

New Patient Flag ✕

Flag Type   Needs Authorization ▾ 🟨

Description   Needs prior auth for procedure on 1/31. |

[Save]   [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.

+ Add new patient

Demographics

Appointments
Clinical Dashboard
Documents
Eligibility
Tasks   0
Problem List   9
Medication List   5
Send eRx
Allergy List   4
Drug Interactions   6
CQMs
Intake Data
Lab Orders
Immunizations

Jenny (Jen) Harris   (Female | 40 years old | Feb. 11, 1980)   HAJE000001

Phone: (844) 569-8628   **Email:** Missing   **Date Added:** Nov. 3, 2020
Address: 1001 N Rengstorff Ave   **Last Scheduled Appt:** Mon Jan 11, 2021
Mountain View , CA 94040   **Next Scheduled Appt:**
CDS: Adult Immunization Schedule Age: 27-49

☑ onpatient access enabled

Primary Provider: James Smith

[New Referral] [Fax Demographics] [🖶 Print Demographics]   [♥ Vitals] [+ Schedule New Appointment]

Important   Demographics   Insurances   Authorizations   Smoking Status   **Flags**   Balance   onpatient Payments

✓ Sufficient patient demographics to bill insurance.

Patient Flags   [Show Archived Flags]

	Type	Description	Appointment	Date	Updated by		
🟨	Needs Authorization	Needs prior auth for procedure on 1/31.		2021-01-12 12:26:20	Brendan Wilberton	✏ Edit	Archive

[+ Add Flag]

→ [Save Demographics]