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	ule	Cli	nical	Patients Reports	Billin	g Accour	nt Help	\$ ×								Search		
0	Ju	ıl	•	2020	PATIENT Patient List	ōday	2 Refresh	🔒 Print Appts				Jul 19 2020 - Jul 25	*	-		Daily	Exam Rooms	Doctor	v
Su	Мо	Tu	We	Th	Consent Forms Patient Flags	Sun 7,	(19 x	Mon 7/20	×	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 new patien	*														
Jenny (Jen) Harris (Female 40 years old Feb. 11, 1980)															
Demographics	-	Phone: (844) 569-8628 Email: Missing Date Added: Nov. 3, 2020 Address: 1001 N Rengstorff Ave Last Scheduled Appt: Mon Jan 11, 2021													
Appointments	Mountain View , CA 94040 Next Scheduled Appt:														
Clinical Dashboard		CDS: Adult Immunization Schedule Age: 27-49													
Documents Solution on patient access enabled															
Eligibility		Primary Provider: James Smith													
Tasks	0	New Referra	Fax Demographics	Print Demographics				Vitals	+ Schedule I	New Appointment					
Problem List	9	Important	Demographics Insuran	ces Authorizations	Smoking Status	Flags Balance	onpatient Payments								
Medication List	6	Cufficient n	atient demographics to b	llingurance											
Send eRx		• Suncient p	atient demographics to b	il insurance.											
Allergy List	4	Patient Flag	js						S	how Archived Flags					
Drug Interactions	6	Туре	Description	Арр	pintment	Date	Updated by								
CQMs										+ Add Flag					
Intake Data										-					
Lab Orders			Save Demo	raphics	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		Phone: (844) 569-8628 Email: Missing Address: 1001 N Rengstorff Ave Mountain View , CA 94040	Date	Added: Nov. 3, 2020 d Appt: Mon Jan 11, 2021		
Clinical Dashboard		CDS: Adult Immunization Schedule Age: 27-4	9			
Documents	✓ onpatient access enabled					
Eligibility	Primary Provider: Jan	nes Smith				
Tasks 0	New Referral Fax Demo	graphics 🖨 Print Demographics			Vitals + Sched	ule New Appointment
Problem List 9	Important Demographics	Insurances Authorizations Smoking Status	Flags Balar	nce onpatient Payments		
Medication List 6	✓ Sufficient patient demogra	phics to bill insurance.				
Send eRx		•				
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		ave Demographics				
Immunizations						