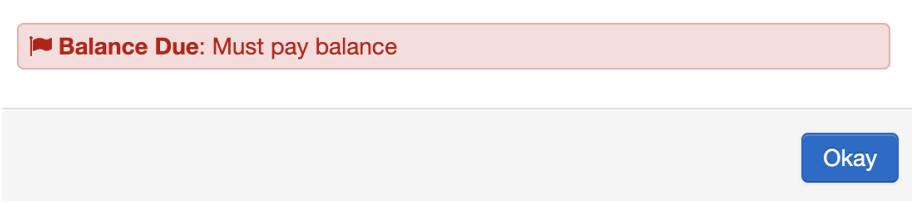# Patient Flag Alerts

07/24/2024 7:10 pm EDT

Note: The Patient Flag Alerts feature is being enabled for customers over the next month. All accounts will have this feature by mid-February.

Patient Flag Alerts can be set up so that designated flags will pop up for patients or appointments that have been assigned those flags.

For example, if the patient has a balance due, you can set it up so that a Balance Due flag pops up for the patient.

Flag Alert

🚩 **Balance Due**: Must pay balance

Okay

For more information on Patient Flags click on the resources below.

How to Create a Patient Flag

Adding a Flag to a Patient

How do I add a patient flag to an appointment?

To set up Patient Flag Alerts, go to **Patients** > **Patient Flags**.

Patients Reports

PATIENT
Patient List
Consent Forms
Patient Flags
Patient Groups
Send Email
Send Referral

You can add the alert to existing flags or when you create a new flag. Simply check the **Alert Flag** checkbox when you create a new flag or edit an existing one. Click **Save/Create** to finish.

Edit Patient Flag Type

Name   Balance Due

Color

Alert Flag   ☑ ←

Save   Cancel

The flags you have set for alerts will appear when you schedule an appointment after you enter and select the patient.

Schedule Appointment ✕

| **Appointment** | Billing | Eli... | ... | ... | ... | ... | Custom Data | MU Helper |

Type ◉ Appointment ☐ Referral

Patient Statement Balance: **$335.00** ...d HealthCare [87726]

🚩 **Balance Due:** $100   🚩 **Fall Risk:** ... w up in 3 months. 🚩 **Likes Cats:**

Flag Alert

🚩 **Balance Due:** $100

🚩 **Fall Risk:**

🚩 **Auto Accident:**

🚩 **Schedule Follow Up:** Reminder to have the patient schedule a follow up in 3 months.

Okay

Provider   Sample Doctor

Patient   Laurie Test Sampl... ➕ ✏️

Reason:

Profile:

Scheduled: 09/27/2023   Time 08:00AM   Exam: Exam 1

Duration: 30 minutes ☐ Allow overlapping   Color:

Notes: Status:

🖉 View Clinical Note

Consent Forms: ✕ HIPAA Data Use Agreement (default) ✕ No Show Policy (default)

View All Appointments

☐ Recurring Appointment
☐ Arrange a Follow-up Reminder
☐ View Active Reminders:

The alerts will also appear when you go to a patient's chart.

Schedule   Clinical   Patients   Reports   Billing   Account   Marketplace   Help   ✕   Search ✉34 ≡26 ➕

➕ Add new patient   SAJA000001

Demographics

Appointments
Clinical Dashboard ⚠️
Documents
Eligibility
Tasks 7
Problem List ⚠️
Medication List ⚠️

Flag Alert

🚩 **Balance Due:** $100

🚩 **Fall Risk:**

🚩 **Auto Accident:**

🚩 **Schedule Follow Up:** Reminder to have the patient schedule a follow up in 3 months.

Okay

Added: Jan. 4, 2022
d Appt: Wed Sep 27, 2023
d Appt:

☑ onpatient access ena...

Primary Provider: D...

New Referral   Fax De...   ...alth App Data   ♥ Vitals   ➕ Schedule New Appointment

✔ Sufficient patient demographics to bill insurance.   🚩 Balance Due: $100   🚩 Fall Risk   🚩 Auto Accident

🚩 Schedule Follow Up: Reminder to have the patient schedule a follow up in 3 months. : 2023-09-27   🚩 Likes Cats

When you have an appointment flag with an alert tied to it, it will appear when you click on the appointment.

Schedule Appointment   ✕

| **Appointment** | Billing | Elig | | | | | stom Data | MU Helper |

Type ◉ Appointment

Flag Alert

🏳 **Schedule Follow Up:** Reminder to have the patient schedule a follow up in 3 months.

Patient Statement Balance: **$335.00**   d HealthCare [87726]

🏳 **Balance Due: $100**   🏳 **Fall Risk:**   w up in 3 months.   🏳 Likes Cats:

[Okay]

Provider	Sample Doctor
Patient	Laurie T. Sample - 12/08/1990 ▾ ✚ ✎ ⎘	Office:	Office 1 ▾ ✚ ✎
Reason:		Profile:	--------- ▾
		Eligibility Profile:	--------- ▾
Scheduled:	09/27/2023 Time 08:30AM ⇅	Exam:	Exam 1 ▾
Duration:	30 minutes ☐ Allow overlapping	Color:	
Notes:		Status:	▾
			0h 21m
			🖉 View Clinical Note
Consent Forms:	✕ HIPAA Data Use Agreement (default) ✕ No Show Policy (default)		View All Appointments

☐ Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
☐ Arrange a Follow-up Reminder
☐ View Active Reminders:

To remove the alerts for the patient, you can archive the flag for the patient or appointment in the patient's chart or in the appointment window.

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

Patient Flags   [Show Archived Flags]

	Type	Description	Appointment	Date	Updated by		
🟧	Balance Due	$100		2023-09-27 12:29:15	Sample Doctor		Archive
🟥	Fall Risk			2022-01-04 09:48:43	Sample Doctor	✎ Edit	Archive
🟨	Auto Accident			2023-09-27 12:30:19	Sample Doctor	✎ Edit	Archive
🟦	Schedule Follow Up	Reminder to have the patient schedule a follow up in 3 months.	2023-09-27 08:30:00	2023-09-27 12:27:47	Sample Doctor	✎ Edit	Archive
🟦	Likes Cats			2023-08-28 15:06:51	Sample Doctor	✎ Edit	Archive

✚ Add Flag

[Save Demographics]

Schedule Appointment ✕

| Appointment | Billing | Eligibility | Vitals | Growthcharts | **Flags** | Log Comm. | Revisions | Custom Data | MU Helper |

Flags for this Appointment

[+ Add a Flag to Patient] [+ Add a Flag to this Appointment]

	Type	Description	Appointment	Updated at	Updated by		
▪	Schedule Follow Up	Reminder to have the patient schedule a follow up in 3 months.	**2023-09-27 08:30:00**	2023-09-27 12:27:47	Sample Doctor	➡	Archive

Other Patient Flags

	Type	Description	Appointment	Updated at	Updated by		
▪	Balance Due	$100		2023-09-27 12:29:15	Sample Doctor	➡	Archive
▪	Fall Risk			2022-01-04 09:48:43	Sample Doctor	✏ Edit	Archive
▪	Auto Accident			2023-09-27 12:30:19	Sample Doctor	✏ Edit	Archive
▪	Likes Cats			2023-08-28 15:06:51	Sample Doctor	✏ Edit	Archive

Under the Audit Log (**Clinical** > **Audit Log**), you can view where the pop-up flag alert was accessed and that it was acknowledged when the user clicked the **Okay** button.

Acknowledge the Flag Alert from Appointment Popup Window

Accessed Flag Alert from Appointment Popup Window

Audit Log Report

| Patient's Name ⇅ | Username | (All log types) ⌄ | 09/21/2023 | 09/28/2023 | Update Filter | | View Last: | Day | Week | Month | Year |

[Export to File]   PAGE 1 →

Date ↓	Time	Patient	User	Type	Action	Details	IP
09/27/2023	05:28:26 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Appointment	Read	Acknowledge the Flag Alert from Appointment Popup Window	2600:4040:b43a:5900:71b
09/27/2023	05:28:24 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Appointment	Read	Accessed Flag Alert from Appointment Popup Window	2600:4040:b43a:5900:71b
09/27/2023	05:28:24 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Appointment	Read	Opened the appointment	2600:4040:b43a:5900:71b
09/27/2023	12:49:36 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Chart	Read	Acknowledge the Flag Alert from Patient Chart page	2600:4040:b43a:5900:71b
09/27/2023	12:48:46 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Chart	Read	Accessed Flag Alert from Patient Chart page	2600:4040:b43a:5900:71b
09/27/2023	12:48:43 PM EDT	100103542 (Laurie T. Sample) [SAJA000001]	258700 (sampledoctormd)	Chart	Read	Opened patient's chart	2600:4040:b43a:5900:71b

Acknowledge the Flag Alert from Patient Chart page

Accessed Flag Alert from Patient Chart page