What do the lock and flag icons on my appointments mean?

07/24/2024 10:47 pm EDT

The lock icon (

)on your appointments gives you a quick way to know if a clinical note has been locked without having to open the appointment to check. Once a note is locked, the icon will appear when viewing the schedule. For example, below we can see that notes for 3 of the appointments have been locked.

Schedule		ule Clinical Patients		Report	s Billing	Account	Marketplace	Help	ŧ	×				Search			1 26 +			
¢) M	lar	~	2023	· ~	0	+ Event	🛱 Today	2 Refresh	🖶 Print Appts			*	Mar 21 2023	*	Daily	Exam Rooms	Doctor	Weekly	Monthly
s	u Mo	ът	īu W	e Th	Fr	Sa								т	ue 3/21					
2	6 27	2	8 1	2	3	4	8:00am	8:00 - 8:30 am Laurie T. Sam	ole: Office 1	_				_			_			JS
Ę	6	1	7 8	9	10	11		Launo n cum												
1	2 13	3 1	4 1	5 16	5 17	18														e
1	9 20) 2	1 22	2 23	24	25		8:30 - 9:00 am Lucy Sample:	Office 1											JS
2	6 27	2	28 29	9 30	31	1														
Doctors				Selec	rt all /	none	9:00am	9:00 - 9:30 am Larry Patient:	Office 1											JS
Jane Smit		Smith 0													Δ					
Dr. James			es Sm	hith		5		9:30 - 10:00 am												JS
0	Offices			Selec	t all /	none		Sally Patient: (Office 1										$\overline{}$	
Office 1																				
Office 2							10:00am	10:00 - 10:30 a	n											La Sr
Office 3								Jane Patient:	Jffice 1											
Office 4																				

The flag icon (

) lets you know that you have assigned a flag to this patient. For more information on assigning flags to patients, see our article here.

8:00 - 8:30 am		JS
Laurie T. Sample: Office 1		
		JS
8:30 - 9:00 am		JS
Lucy Sample: Office 1		
9:00 - 9:30 am		JS
Larry Patient: Office 1		
9:30 - 10:00 am Sally Patient: Office 1		JS
Sally Patient: Office 1		
		A JS
10:00 - 10:30 am		JS
Jane Patient: Office 1		

You can control whether or not the icons appear by going to Account > Provider Settings.

Account	Marketplace							
ACCOUNTS	SETTINGS							
User Settir	User Settings							
Provider S	ettings							
onpatient	Settings							
Account Setup								
Custom Fi	elds							

Under the General tab, you check or uncheck the boxes to have the lock and/or flag icons appear.

Account Settings												
Profile	General	Email	Medical Billing	eRx Info	Services	Usage	Sample Data	Security				

Calendar Settings

Display flag icon on appointment	Display Flag icon on appointments when a patient/appointment has flag(s) associa						
Display lock icon on appointment	Display Lock icon on appointments when the clinical note is locked						
Use new dashboard homescreen	Uncheck to go straight to the calendar after logging in						
Show user satisfaction survey	Uncheck to opt out of user satisfaction surveys.						
Default Office	Office 2 ~	Default Office on Calendar					
Duration of Exam	30	Default duration of an exam in minutes					
Duration of Follow-up	15	Default duration of a follow-up exam in minutes					
Examroom Calendar Increments	10 ~	Adjust minute increments on calendar					
Date range on Appointment Template	If true date range can be set for Appointment Template (starting from - ending by).						
Appointment Templates in more views	Show appointment templates in Daily View, Doctor View and Weekly View						
Allow Exam Room Overlaps	<i>w</i> Exam Room Overlaps						

Scroll down and click Update Entire Profile to save your settings.

Update Entire Profile