

Generating a Patient Flag Report

07/08/2024 7:36 pm EDT

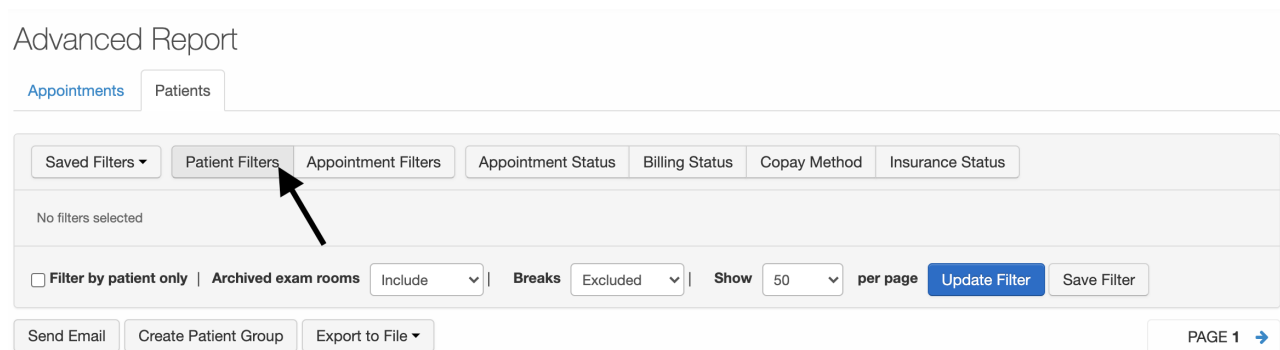
Using patient flags makes easy and quick work of identifying certain subsets of your patient population. Once entered on a patient's chart, you can quickly and easily pull reports based on those flags. Think of these flags as yellow post-itTM notes that are placed on a patient's record.

1. Please hover your cursor over **Reports** and click on **Advanced Report**.



The screenshot shows a navigation menu with three tabs: 'Reports', 'Billing', and 'Account'. The 'Reports' tab is active and highlighted in yellow. Below it, a list of report categories is shown: 'PRACTICE REPORTS' (in blue), followed by 'Account / User Report', 'Productivity Report', 'Reminder Report', 'Outgoing Prescriptions', 'Patient Insurance Authorization', 'Appointment Report', 'Telehealth Report', 'Patient Report', 'Communication Log Report', 'Medication Report', 'Problem Report', 'Allergy Report', and 'Labs Report'. The 'Advanced Report' option is highlighted with a blue background.

2. Click on **Patient Filters**.



The screenshot shows the 'Advanced Report' interface. At the top, there are two tabs: 'Appointments' and 'Patients'. Below the tabs, there is a horizontal menu with several filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. The 'Patient Filters' tab is highlighted with a black arrow pointing to it. Below the filter categories, there is a section for 'No filters selected'. At the bottom, there are several controls: a checkbox for 'Filter by patient only', a dropdown for 'Archived exam rooms' (set to 'Include'), a dropdown for 'Breaks' (set to 'Excluded'), a 'Show' dropdown (set to '50'), and a 'per page' label. There are also buttons for 'Update Filter' and 'Save Filter'. At the very bottom, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File', along with a 'PAGE 1' indicator and a right arrow.

3. Click on **Patient Flag** and click **Close**.

Patient Filter



| | | |
|--|---|---|
| <input type="checkbox"/> Primary Provider | <input type="checkbox"/> Primary Ins Payer Name contains ANY of | <input type="checkbox"/> Patient Portal Disabled |
| <input type="checkbox"/> First Name | <input type="checkbox"/> Primary Ins Payer ID | <input type="checkbox"/> onpatient Connected |
| <input type="checkbox"/> Middle Name | <input type="checkbox"/> Primary Ins Plan Name contains ALL of | <input type="checkbox"/> Payment Profile |
| <input type="checkbox"/> Last Name | <input type="checkbox"/> Primary Ins Plan Name contains ANY of | <input checked="" type="checkbox"/> Patient Flag |
| <input type="checkbox"/> Default Appointment Profile | <input type="checkbox"/> Primary Ins Plan Type | <input type="checkbox"/> Date of Last Appointment <= |
| <input type="checkbox"/> Created After | <input type="checkbox"/> Primary Ins ID # | <input type="checkbox"/> Patient Problem contains ALL of |
| <input type="checkbox"/> Created Before | <input type="checkbox"/> Secondary Ins Payer Name contains ALL of | <input type="checkbox"/> Patient Problem contains ANY of |
| <input type="checkbox"/> Patient Status | <input type="checkbox"/> Secondary Ins Payer Name contains ANY of | <input type="checkbox"/> Patient Medication contains ALL of |
| <input type="checkbox"/> Address | <input type="checkbox"/> Secondary Ins Payer ID | <input type="checkbox"/> Patient Medication contains ANY of |
| <input type="checkbox"/> Zipcode | | |
| <input type="checkbox"/> City | | |
| <input type="checkbox"/> State | | |

4. Select the flag or flags for your report.

Advanced Report

Patient Flag

- Agressive
- Auto Accident**
- Balance Due

Filter by patient only | Archived exam rooms | Breaks | 50

5. Check the option **Filter by patient only** and click **Update Filter**.

Advanced Report

Appointments

Patients

Advanced Report interface showing filter options and a data table.

Filter tabs: Saved Filters, Patient Filters, Appointment Filters, Appointment Status, Billing Status, Copay Method, Insurance Status

Patient Flag: Agressive, Auto Accident, Balance Due

Filter by patient only | Archived exam rooms | Include | Breaks Excluded | Show 50 per page | **Update Filter** | Save Filter

Send Email | Create Patient Group | Export to File | PAGE 1

| Chart ID | Provider | First Name | Last Name | DOB | Home Phone | Cell Phone | Email | Last Appt |
|------------|----------|------------|-----------|------------|------------|----------------|-------|------------|
| SABR000001 | Brendan | Brendan | Sample | 06/10/1981 | | (650) 555-5555 | | 12/18/2020 |