

# Generating a Patient Flag Report

Last modified on 06/10/2026 12:58 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-it™ notes that are placed on a patient's record.

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

**Reports** Billing Account

**PRACTICE REPORTS**

- 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
- Labs Report
- Advanced Report**

2. Click on **Patient Filters**.

Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

No filters selected

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

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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

Appointments **Patients**

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

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

# Advanced Report

[Appointments](#) [Patients](#)

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
<a href="#">SABR000001</a>	Brendan	Brendan	Sample	06/10/1981		(650) 555-5555		12/18/2020