

Adding a Flag to a Patient

07/08/2024 7:41 pm EDT

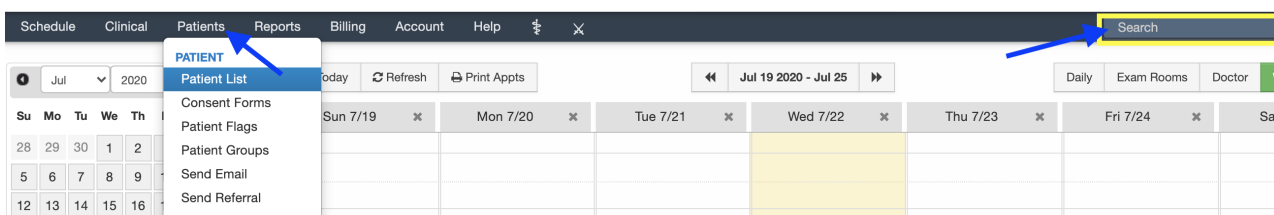
Patient flags are a tool that can be customized to note and report attributes of:

- **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.

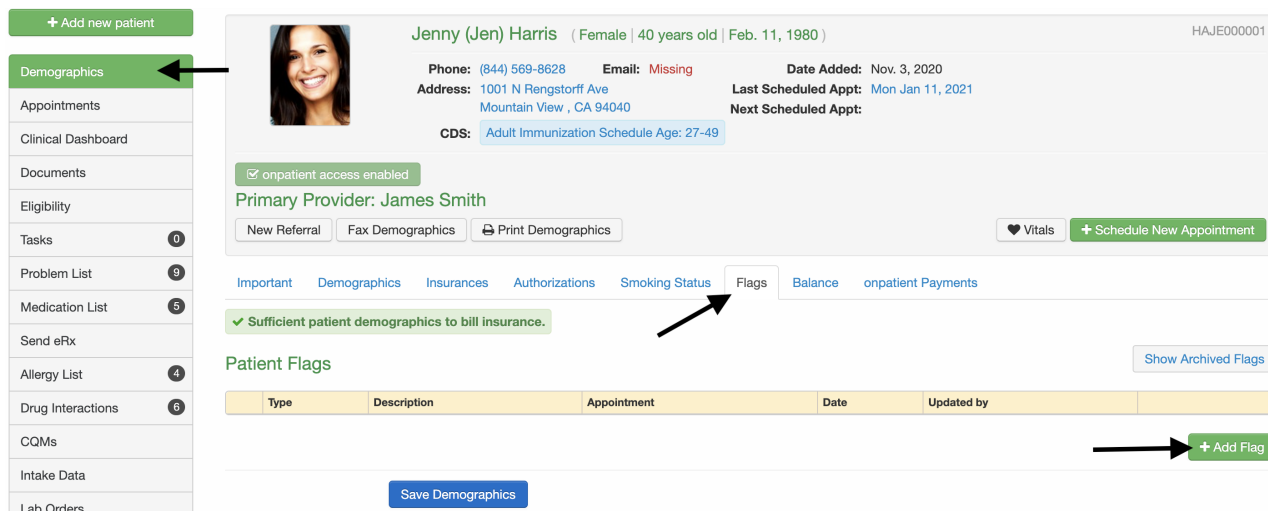
They can also be used to communicate to your staff the actions or characteristics of a patient or appointment and will appear whenever the patient or appointment is opened. Think of it as a yellow sticky note on a patient's chart.

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.



2. Ensure **Demographics** is selected on the left. Navigate to the **Flags** tab and select **+Add Flag**.



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 on 1/31.

Save

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.

[+ Add new patient](#)

- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 0
- Problem List 9
- Medication List 5
- Send eRx
- Allergy List 4
- Drug Interactions 6
- CQMs
- Intake Data
- Lab Orders
- Immunizations

Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980) HAJE000001

Phone: (844) 569-8628 Email: Missing Date Added: Nov. 3, 2020
Address: 1001 N Rengstorff Ave Last Scheduled Appt: Mon Jan 11, 2021
Mountain View, CA 94040 Next Scheduled Appt:
CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled

Primary Provider: **James Smith**

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Sufficient patient demographics to bill insurance.

[Show Archived Flags](#)

Type	Description	Appointment	Date	Updated by	
	Needs Authorization	Needs prior auth for procedure on 1/31.	2021-01-12 12:26:20	Brendan Wilberton	Edit Archive

[+ Add Flag](#)

[Save Demographics](#)