Adding a Flag to a Patient

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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**.

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.