Adding a Flag to a Patient Chart

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Patient flags are customizable tools that function like digital sticky notes on a patient's chart. They allow you to note and report important attributes about patients and appointments, ensuring critical information is visible to all staff members whenever a patient or appointment is accessed.

What Patient Flags Can Track

Patient flags can be used to document two main categories of information:

Patient-Specific Flags

- Outstanding balance or payment issues
- Special care needs or accommodations
- Treatment eligibility status
- Required special paperwork or documentation
- Medical alerts or precautions

Appointment-Specific Flags

- Follow-up visit requirements
- Pending lab results
- Pre-appointment preparation needed
- Post-appointment actions required
- Scheduling restrictions or preferences

How to Add Patient Flags

Access the Patient Chart

Navigate to the patient's record using one of these methods:

- Go to **Patients** > **Patient List** and select the patient
- Use the search function to locate the patient

Navigate to Patient Flags

1. Ensure **Demographics** is selected in the left navigation panel
2. Click the **Patient Flags** tab
3. Select **+Add Flag** to create a new flag

Configure the Flag

1. Use the dropdown menu to select from your existing flag options
2. Optionally, add a description to provide additional context
    - The description will appear as unbolded text within the patient flag

    - Descriptions are not required but can provide helpful details

3. When finished, click **Save** or **Save and Add Another** if you need to add multiple flags

Complete the Process

1. The new flag will be added to the patient's flag list
2. Click **Save Demographics** to finalize your changes
3. The flag will now display on the patient's chart and all associated appointments

Where Patient Flags Appear

Patient flags are designed to be highly visible and will appear in multiple locations throughout the system:

Patient Chart Header

- Flags display at the top of the patient chart
- Click to expand and view all flags for the patient
- Ability to add new patient flags directly from this location

Demographics Section

- Flags are listed under the dedicated "Patient Flags" section
- Full flag management capabilities available
- Easy access for editing or removing flags

Clinical Note Header

- Flags appear at the top of clinical notes
- Ensures providers see important information before documenting care
- Maintains visibility during patient encounters

Reporting Features

Patient flags can be used to generate valuable reports that provide insights into:

- Patient demographics and characteristics
- Appointment patterns and requirements
- Outstanding balances or payment issues
- Special care needs across your patient population
- Follow-up requirements and compliance