

Patient Flag Alerts

07/08/2024 7:45 pm EDT

Note: The Patient Flag Alerts feature is being enabled for customers over the next month. All accounts will have this feature by mid-February.

Patient Flag Alerts can be set up so that designated flags will pop up for patients or appointments that have been assigned those flags.

For example, if the patient has a balance due, you can set it up so that a Balance Due flag pops up for the patient.

Flag Alert

 **Balance Due:** Must pay balance

Okay

For more information on Patient Flags click on the resources below.

[How to Create a Patient Flag](#)

[Adding a Flag to a Patient](#)

[How do I add a patient flag to an appointment?](#)

To set up Patient Flag Alerts, go to **Patients > Patient Flags**.

Patients Reports

PATIENT

Patient List

Consent Forms

Patient Flags

Patient Groups

Send Email

Send Referral

You can add the alert to existing flags or when you create a new flag. Simply check the **Alert Flag** checkbox when you create a new flag or edit an existing one. Click **Save/Create** to finish.

Edit Patient Flag Type



Name

Color

Alert Flag ←

Save

Cancel

The flags you have set for alerts will appear when you schedule an appointment after you enter and select the patient.

Schedule Appointment

Appointment | Billing | Eligibility | Custom Data | MU Helper

Type Appointment

Patient Statement Balance: \$335.00

Balance Due: \$100 | Fall Risk: | Auto Accident: | Schedule Follow Up: Reminder to have the patient schedule a follow up in 3 months.

Referral

HealthCare [87726]

Follow up in 3 months. | Likes Cats:

Provider: Sample Doctor

Patient: Laurie Test Sample

Reason:

Scheduled: 09/27/2023 Time 08:00AM

Duration: 30 minutes Allow overlapping

Notes:

Consent Forms: HIPAA Data Use Agreement (default) No Show Policy (default)

Profile: Exam: Exam 1

Color: [Yellow]

Status:

View Clinical Note

View All Appointments

Okay

- Recurring Appointment
- Arrange a Follow-up Reminder
- View Active Reminders:

The alerts will also appear when you go to a patient's chart.

Schedule | Clinical | Patients | Reports | Billing | Account | Marketplace | Help

Search

+ Add new patient

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Tasks

Problem List

Medication List

SAJA000001

Added: Jan. 4, 2022

Appt: Wed Sep 27, 2023

Appt:

Health App Data | Vitals | Schedule New Appointment

onpatient access ena

Primary Provider:

New Referral | Fax De

Sufficient patient demographics to bill insurance. | Balance Due: \$100 | Fall Risk: | Auto Accident: | Schedule Follow Up: Reminder to have the patient schedule a follow up in 3 months. : 2023-09-27 | Likes Cats

Flag Alert

Balance Due: \$100

Fall Risk:

Auto Accident:

Schedule Follow Up: Reminder to have the patient schedule a follow up in 3 months.

Okay

When you have an appointment flag with an alert tied to it, it will appear when you click on the appointment.

Schedule Appointment ✕

Appointment | Billing | Eligibility | Custom Data | MU Helper

Type Appointment

Patient Statement Balance: \$335.00

Balance Due: \$100 **Fall Risk**

Flag Alert

Schedule Follow Up: Reminder to have the patient schedule a follow up in 3 months.

[Okay](#)

Provider: Sample Doctor

Patient: Laurie T. Sample - 12/08/1990 + ✎ 📄

Office: Office 1 + ✎

Reason:

Profile: -----

Scheduled: 09/27/2023 **Time:** 08:30AM ⬆️ ⬆️

Eligibility Profile: -----

Duration: 30 minutes Allow overlapping

Exam: Exam 1

Notes:

Color:

Status: -----

Consent Forms:

- HIPAA Data Use Agreement (default)
- No Show Policy (default)

0h 21m

[View Clinical Note](#)

[View All Appointments](#)

- Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
- Arrange a Follow-up Reminder
- View Active Reminders:

To remove the alerts for the patient, you can archive the flag for the patient or appointment in the patient's chart or in the appointment window.

Important | Demographics | Insurances | Authorizations | Smoking Status | **Flags** | Balance | onpatient Payments

Patient Flags [Show Archived Flags](#)

Type	Description	Appointment	Date	Updated by	
■ Balance Due	\$100		2023-09-27 12:29:15	Sample Doctor	Edit Archive
■ Fall Risk			2022-01-04 09:48:43	Sample Doctor	Edit Archive
■ Auto Accident			2023-09-27 12:30:19	Sample Doctor	Edit Archive
■ Schedule Follow Up	Reminder to have the patient schedule a follow up in 3 months.	2023-09-27 08:30:00	2023-09-27 12:27:47	Sample Doctor	Edit Archive
■ Likes Cats			2023-08-28 15:06:51	Sample Doctor	Edit Archive

[+ Add Flag](#)

[Save Demographics](#)




Schedule Appointment ✕

Appointment Billing Eligibility Vitals Growthcharts **Flags** Log Comm. Revisions Custom Data MU Helper













Flags for this Appointment

+ Add a Flag to Patient

+ Add a Flag to this Appointment

	Type	Description	Appointment	Updated at	Updated by	
	Schedule Follow Up	Reminder to have the patient schedule a follow up in 3 months.	2023-09-27 08:30:00	2023-09-27 12:27:47	Sample Doctor	 


Other Patient Flags

	Type	Description	Appointment	Updated at	Updated by	
	Balance Due	\$100		2023-09-27 12:29:15	Sample Doctor	 
	Fall Risk			2022-01-04 09:48:43	Sample Doctor	 
	Auto Accident			2023-09-27 12:30:19	Sample Doctor	 
	Likes Cats			2023-08-28 15:06:51	Sample Doctor	 

Under the Audit Log (**Clinical > Audit Log**), you can view where the pop-up flag alert was accessed and that it was acknowledged when the user clicked the **Okay** button.

Audit Log Report

View Last:

PAGE 1 

Date	Time	Patient	User	Type	Action	Details	IP
09/27/2023	05:28:26 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Appointment	Read	Acknowledge the Flag Alert from Appointment Popup Window	2600:4040:b43a:5900:71b
09/27/2023	05:28:24 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Appointment	Read	Accessed Flag Alert from Appointment Popup Window	2600:4040:b43a:5900:71b
09/27/2023	05:28:24 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Appointment	Read	Opened the appointment	2600:4040:b43a:5900:71b
09/27/2023	12:49:36 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Chart	Read	Acknowledge the Flag Alert from Patient Chart page	2600:4040:b43a:5900:71b
09/27/2023	12:48:46 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Chart	Read	Accessed Flag Alert from Patient Chart page	2600:4040:b43a:5900:71b
09/27/2023	12:48:43 PM EDT	100103542 (Laurie T. Sample)	[SAJA000001] 258700 (sampledoctormd)	Chart	Read	Opened patient's chart	2600:4040:b43a:5900:71b

Acknowledge the Flag Alert from Appointment Popup Window

Accessed Flag Alert from Appointment Popup Window

Acknowledge the Flag Alert from Patient Chart page

Accessed Flag Alert from Patient Chart page