

How do I add a patient flag to an appointment?

07/08/2024 7:57 pm EDT

Patient Flags are a tool that can be customized to denote 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 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. Flags also may be used to generate reports, which can give you greater insights into your patients and/or appointments.

To add a patient flag to an appointment, open an appointment or create a new appointment with the **+Event** button in your calendar.



Add in your patient information and click save. Once you click save, the other tabs of the appointment will be available to you. Select the **Flags** tab.



In the flags tab, select the **+Add a Flag to this Appointment** button.

Flags for this Appointment + Add a Flag to Patient + Add a Flag to this Appointment

Type	Description	Appointment	Updated at	Updated by	
------	-------------	-------------	------------	------------	--

Other Patient Flags

Type	Description	Appointment	Updated at	Updated by	
	Difficult Personality		2016-08-04 10:57:38	Thomas Your	Edit Archive
	Allergy		2016-08-04 10:57:15	Thomas Your	Edit Archive
	Asks Many Questions		2016-08-04 10:57:09	Thomas Your	Edit Archive
	Missing Information	Secondary insurance details incomplete	2016-08-04 10:57:00	Thomas Your	Edit Archive

The New Appointment Flag section will appear below. Fill out this section and select **Save**.

New Appointment Flag

Flag Type 

Description

When you select Save, your flag will be attached to your appointment.

Flags for this Appointment

Type	Description	Appointment	Updated at	Updated by	
 Consent Needed	CT Scan	2016-12-06 17:25:00	2016-12-06 16:29:32	Thomas Your	<input type="button" value="Edit"/> <input type="button" value="Archive"/>

Now when the appointment is viewed by anyone in your practice group, they will see the new flag.

Appointment | Billing | Vitals | Revisions | Eligibility | Flags | Custom Data | Com. Log | MU Helper

Type Walk-in Transition of Care

Patient Statement Balance: \$211.80 **Primary Insurance: Anthem Blue Cross [47198]**