Tracking Important Dates and Information Using Patient Flags

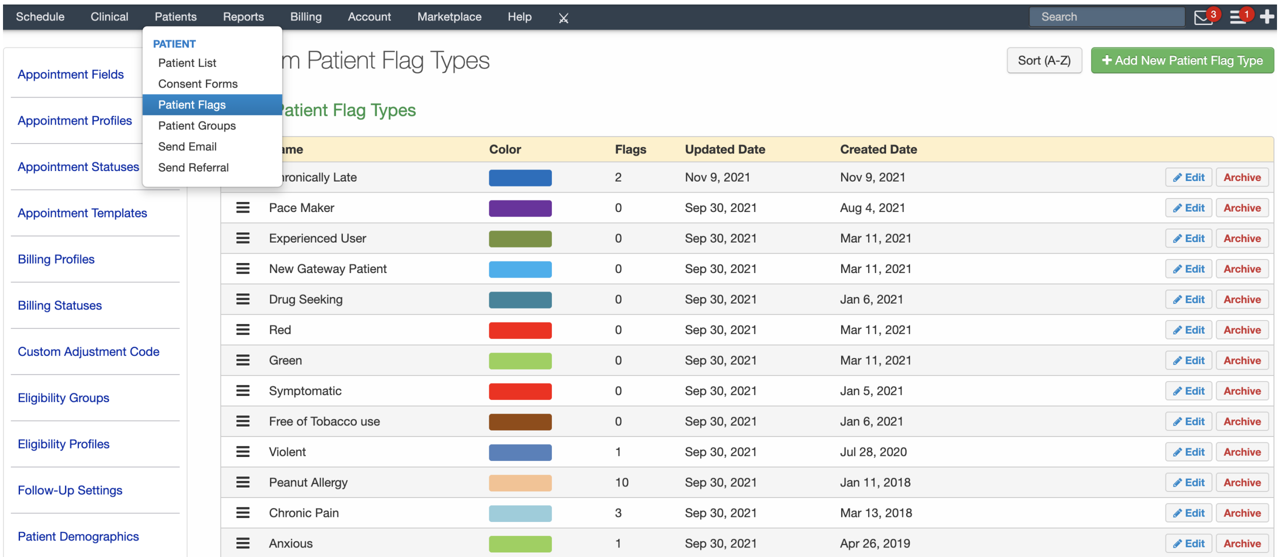
Last modified on 06/10/2026 1:25 pm EDT

Patient flags are a powerful way to keep important information front and center on a patient's chart. Whether you need to track a patient's due date, monitor when forms or tasks are coming due, or alert staff to special care needs, patient flags make it easy to stay organized and ensure nothing is missed.

This article explains how to create patient flags for tracking dates and tasks, add them to patient charts, and run reports on flagged patients.

Step 1: Create Your Patient Flag Types

Before adding flags to patient charts, you'll need to set up the flag types your practice will use.



- Hover over the Patients tab in your menu bar and select Patient Flags from the drop-down list.
- Click +Add New Patient Flag Type in the top right corner.
- Enter a name for the flag. Choose something clear and descriptive, such as:
  - Pregnancy Due Date
  - Form Due – 30 Days
  - Task Pending Review
  - Prior Auth Expiring
- Select a color for the flag. Using consistent color coding (e.g., red for urgent, yellow for upcoming) helps staff quickly prioritize at a glance.
- Click Create. The flag type is now available to assign to any patient.

> You can edit the flag name or color at any time by clicking Edit next to the flag in the Patient Flags list.

Optional: Enable an Alert for the Flag

If you want staff to be notified any time they access a chart with this flag, you can enable a flag alert.

1. From the Patient Flags list (Patients > Patient Flags), select the flag you just created.

2. Check the box labeled Alert Flag.

3. Click Save.

Once enabled, a Flag Alert window will pop up when staff schedule an appointment, open the patient's chart, or access a flagged appointment. The alert will continue to appear until the user clicks Okay, and each acknowledgment is recorded in the Audit Log.

Step 2: Add the Flag to a Patient's Chart

- Navigate to the patient's chart by going to Patients > Patient List or using the search function.
- In the left navigation panel, ensure Demographics is selected.
- Click the Patient Flags tab.
- Click +Add Flag.
- Use the dropdown to select the appropriate flag (e.g., "Pregnancy Due Date").
- In the Description field, enter the specific detail you're tracking. For example:
    - For a pregnancy due date: "EDD: 09/15/2025"
    - For a form due date: "ROI expires 07/01/2025 – send renewal"
    - For a task: "Pending lab results – follow up by 06/20/2025"
- Click Save, then click Save Demographics to finalize.

> The description appears as unbolded text beneath the flag name, so staff can see both the flag type and the specific detail at a glance.

Where the Flag Will Appear

Once added, the flag is visible throughout the system:

- **Patient Chart Header:** Flags display at the top of the chart and can be expanded to view details.
- **Demographics Section:** Full flag management is available here, including editing and removal.
- **Clinical Note Header:** Flags appear at the top of clinical notes so providers are informed before documenting care.
- **Appointment View:** Appointment-specific flags display when accessing any associated appointment.

Step 3: Run a Report on Flagged Patients

Once flags are in use, you can generate a report to see all patients with a specific flag – for example, a list of all pregnant patients or all patients with expiring forms.

1. Hover over Reports and click Advanced Report.

2. Click Patient Filters.

3. Select Patient Flag from the filter list and click Close.

4. In the Patient Flag dropdown that appears on the report screen, select the flag or flags you want to report on.

5. Check the Filter by patient only checkbox.

6. Click Update Filter.

The report will display all patients with the selected flag(s), showing Chart ID, provider, name, date of birth, contact info, and last appointment date.

> You can export the results using the Export to File button for use outside of DrChrono, or click Send Email to contact the filtered patient group directly.