

Using Flags and Alerts on the Schedule

Last Modified on 10/18/2023 12:26 pm EDT

Version 14.19



Our new Multi-Location Calendar updates are here! Please see the [OP 21.3 Calendar Articles](#) for an overview of the changes. Practices can configure OP to [switch to the new calendar](#) and explore its features.

Path: Clinical, Practice Management, Billing tab > Schedule button

Overview

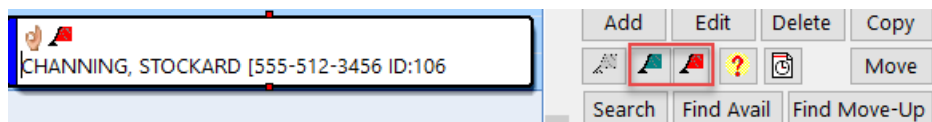
Flags can be used on the calendar to add an alert to an appointment. There are only two flag color types available **Green** and **Red**. The meaning of these flags will be designated by the practice. Their only function is to alert office staff to a certain status or characteristic of an appointment, such as co-pay not paid, newborn appointment, etc.

Reminder and alert indications can also be applied to an appointment on the calendar. These indications are shown with a question mark and bell symbol. Similar to the flags, the meaning of these indications will also be determined by the practice.

Pop-up alerts can be added to the Miscellaneous Notes and Billing Notes sections in the patient chart, which will then "pop up" while scheduling an appointment, navigating the Account feature for the patient, and accessing the patient chart.

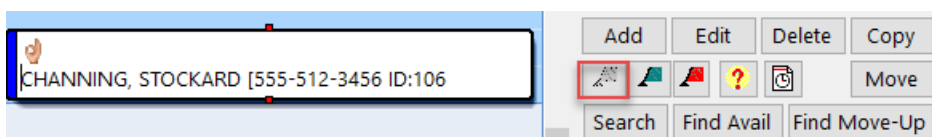
Using a Flag

1. Click on an appointment to select it.
2. With the appointment highlighted, click on either the **Green Flag** or **Red Flag** button in the task bar below the calendar, to add it to an appointment.
3. Flag will now display on the appointment.



Removing a Flag

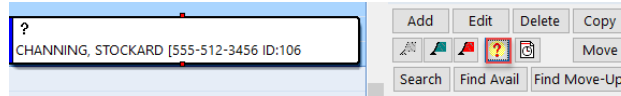
1. Click on the appointment to remove a flag.
2. Click on the **Clear Flag** button to remove it from the appointment.



Toggle Tentative Appointments

The **Toggle Tentative Appointment** button toggles (adds/removes) a question mark icon to a selected appointment. This function can be used to indicate if the appointment has not been confirmed. Practices can determine how this indicator is used in their workflow. To apply the Tentative Appointment indicator to an appointment:

1. Click on the appointment that you wish to add or remove the Tentative Appointment indicator.
2. Click the **Toggle Tentative Appointment** button to add or remove the tentative appointment indicator (question mark) to the schedule.



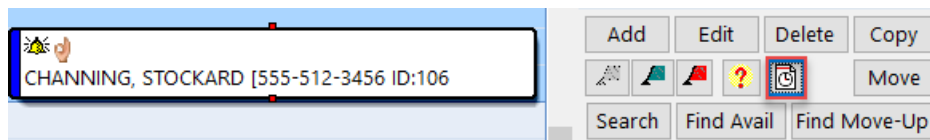
Toggle Reminder Status

The **Toggle Reminder Status** button toggles (adds/removes) a bell icon to a selected appointment. Practices can determine how this indicator is used in their workflow. Some examples for the use of this indicator include:

- Obtaining a patient's updated insurance card.
- Indicating that a payment is required.
- Indicating that an immunization is required.

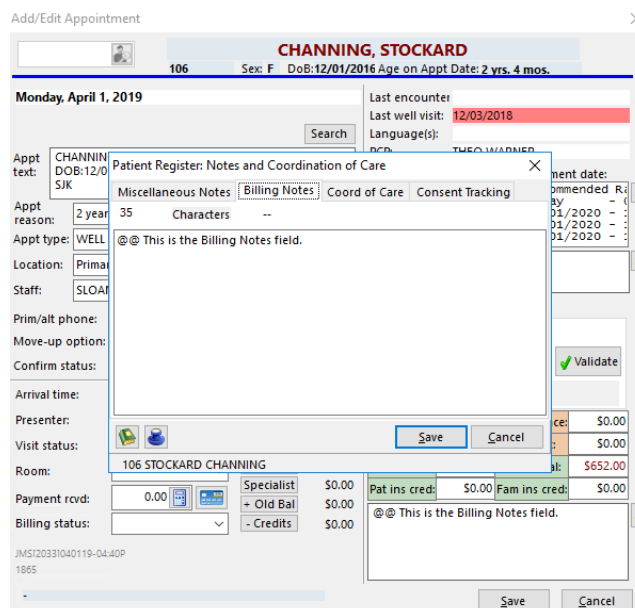
To apply the Reminder Status indicator to an appointment:

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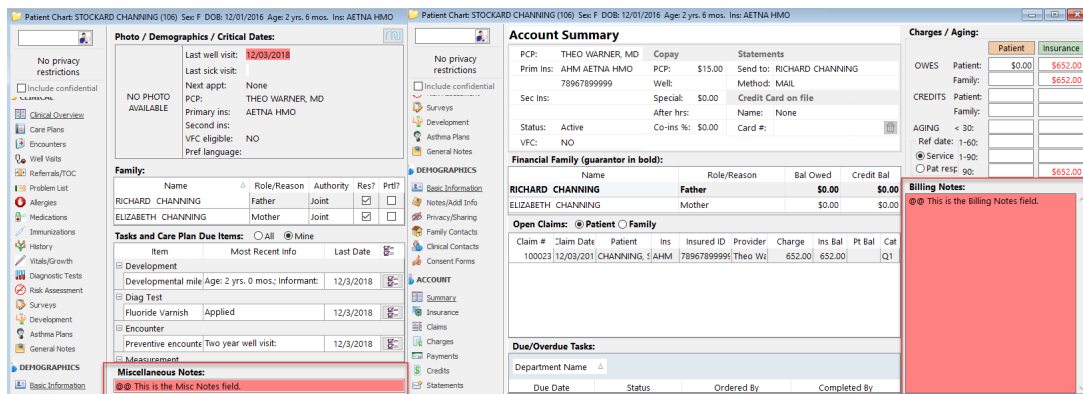


Pop-up Alerts

Pop-up alerts can be created in both the Miscellaneous Notes and Billing Notes for a patient. You can create this pop-up by including a 'stop code' in the Miscellaneous or Billing note that requires review by the front desk or staff who will be scheduling appointments or checking in patients. To do so, insert the stop code ("@@") at the beginning of the note. Then, the next time the staff attempts to schedule or check-in the patient, the note will appear on the screen.



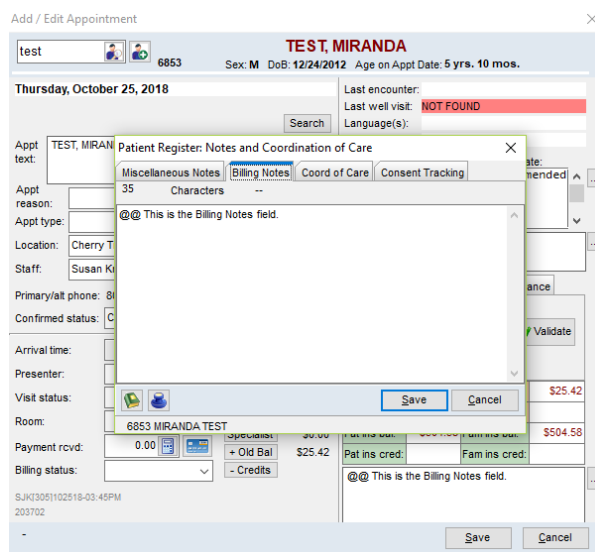
Additionally, the inclusion of this stop code will color the Miscellaneous Note section of the Clinical Overview and the Billing Note section of the Account Summary (in the Patient Chart) in red to make it more visible to the user.



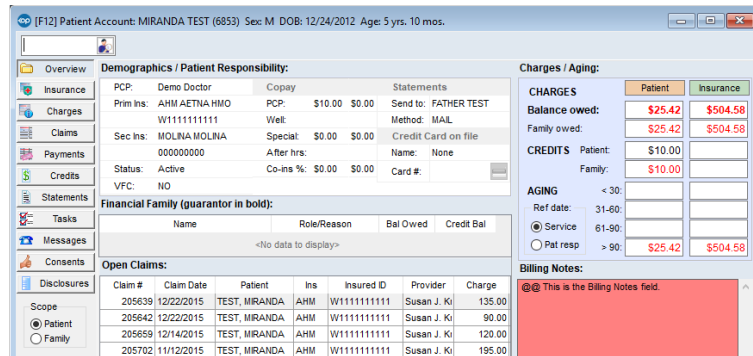
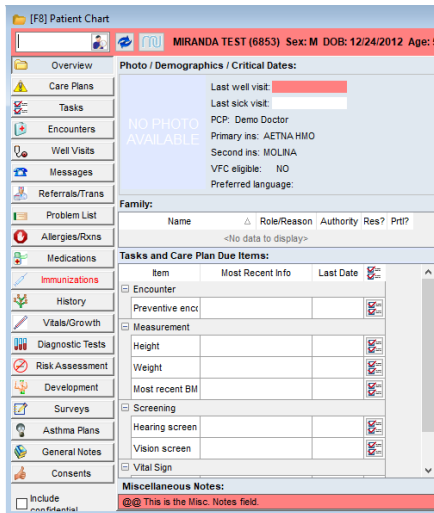
Version 14.10

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Additionally, the inclusion of this stop code will color the Miscellaneous Note section of the Chart and Billing Note section of the Patient Account in red to make it more visible to the user.



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Path: Smart Toolbar > Schedule button

Overview

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Add/Edit Appointment

CHANNING, STOCKARD
106 Sex: F DoB:12/01/2016 Age on Appt Date: 2 yrs. 4 mos.

Monday, April 1, 2019

Appt text: CHANNING DOB:12/01/2016 SJK

Appt reason: 2 year 35 Characters

Appt type: WELL

Location: Primary

Staff: SLOAN

Prim/alt phone:

Move-up option:

Confirm status:

Arrival time:

Presenter:

Visit status:

Room: 106 STOCKARD CHANNING

Payment rcvd: 0.00

Billing status:

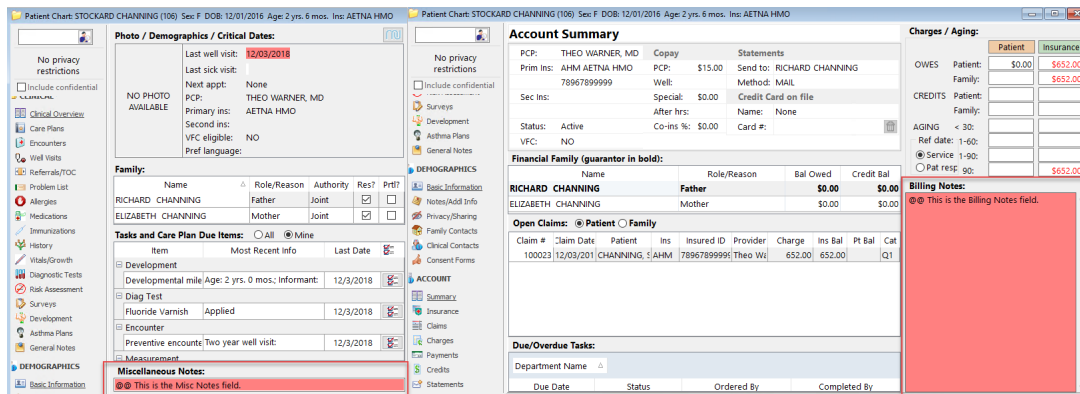
Specialist \$0.00
+ Old Bal \$0.00
- Credits \$0.00

Pat ins cred: \$0.00 Fam ins cred: \$0.00

@@ This is the Billing Notes field.

Validate Save Cancel

Additionally, the inclusion of this stop code will color the Miscellaneous Note section of the Clinical Overview and the Billing Note section of the Account Summary (in the Patient Chart) in red to make it more visible to the user.



The screenshot shows the Patient Chart for STOCKARD CHANNING (106). The Account Summary section is highlighted in red, showing a balance of \$652.00. The Billing Notes section is also highlighted in red, containing the text "@@ This is the Billing Notes field." The Clinical Overview section shows a Miscellaneous Note with the same text, also highlighted in red.

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