

# Add Account Flags

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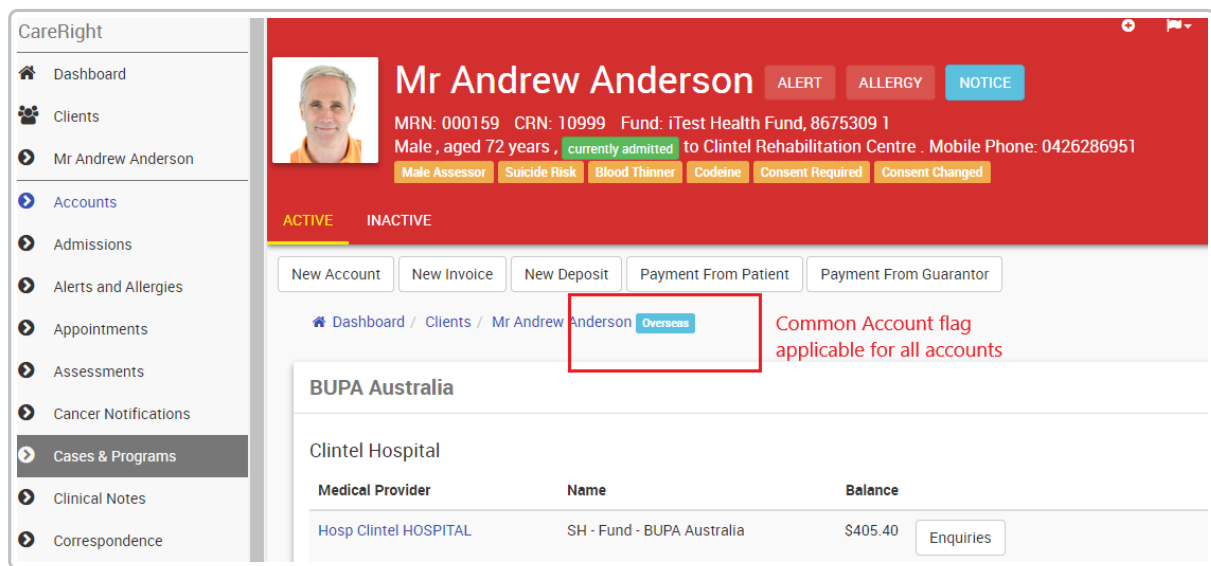
## Patient Account Flags

In CareRight, account flags can be defined by the system administrator and then applied to patient accounts. This can be used in reporting to identify customer-specific flags or types of accounts.

Please refer to [Create Account Flags](#) in the system administration guide for more information on how to create account flags.

Account flags can be used in two different ways

1. A common account flag can be selected for all accounts for a patient. This can be edited at any time.



The screenshot shows the CareRight interface for a patient named Mr Andrew Anderson. The left sidebar contains navigation links: Dashboard, Clients, Mr Andrew Anderson, Accounts, Admissions, Alerts and Allergies, Appointments, Assessments, Cancer Notifications, Cases & Programs (highlighted), Clinical Notes, and Correspondence. The main content area displays the patient's profile with a photo, name, and various flags. A red box highlights the 'Overseas' flag, which is labeled as a 'Common Account flag applicable for all accounts'. Below the profile, there is a table for BUPA Australia accounts, showing a balance of \$405.40.

Medical Provider	Name	Balance
Hosp Clintel HOSPITAL	SH - Fund - BUPA Australia	\$405.40

To add this flag

1. Find out the patient, Click **Summary**
2. Under the session **Accounting Details**, Select the **Default Account Flag** from the drop-down. (This list can be configured by the system administrator as you required, please refer to [Create Account Flags](#) in System Admin Guide.)
3. Click **update Patient**

**Mr Andrew Anderson** ALERT ALLERGY NOTICE

Demographics >

Government Benefit >

Health Fund > Add Fund

Accounting Details ▾

Account Type: Private

Bank Account Name:

Bank Account BSB:

Bank Account Number:

Default Account Flag: Overseas (selected)  
Grant Scheme  
Overseas  
Trial Scheme

Contact Details >

Update Mr Andrew Anderson Cancel

2. Separate account flags can be assigned for each accounts for a patient. Once an invoice or statement has been created on the account, the account flag may not be edited. This is to prevent modification of financial history. This can be used in reporting to identify customer-specific flags or types of accounts.

Separate flags can be added to individual accounts for a patient only if;

- The account has no Invoices/receipts or statements created ever
- No default account flags added to patient accounts.

Mr Andrew Anderson

Male, aged 72 years, currently admitted to Clintel Rehabilitation Centre. Mobile Phone: 0426286951

Male Assessor Suicide Risk Blood Thinner Codeine Consent Required Consent Changed

ACTIVE INACTIVE

New Account New Invoice New Deposit Payment From Patient Payment From Guarantor

Dashboard / Clients / Mr Andrew Anderson Overseas

**BUPA Australia**

Clintel Hospital

Medical Provider	Name	Balance	
Hosp Clintel HOSPITAL	SH - Fund - BUPA Australia	\$405.40	Enquiries

East St Kilda

Medical Provider	Name	Balance	
Dr Ian JONES	SH - Fund - BUPA Australia	\$0.00	Enquiries
Dr Ratko NED	RN - Fund - BUPA Australia	\$120.00	Enquiries

To add this flag;

- Find out the patient, Click **Accounts**

- Click **Enquiries**
- Select **View** from the left menu
- Click **Edit**, Select the account flag from the drop-down. (This field will be non-editable if any statements are created in this account)

Male, aged 44 years, currently admitted to Clintel Hospital. Mobile Phone: 0426286951

Blood Thinner Falls Risk Penicillin Latex Codeine Interpreter Required

Private Workers Compensation Legal Medicare Dva Health Fund Hearing Services Program

Dashboard / Clients / Mr CALEB Gray / Accounts / RN - W. Comp - Workcover Victoria -SGIO

### Details

**Location** MS Consulting

**Guarantor** Workcover Victoria -SGIO

**Account Provider** Dr Ratko NED

**Account Flag** Select from list

- Grant Scheme
- Overseas
- Trial Scheme
- ☐ Inactive Account

### Administration

☐ To Debt Collectors

**To Debt Collectors on**

In the event that you add an invoice/deposit to an account when its flag does not match the patient's default flag, then a warning will appear as follows:

Dashboard / Patients / Mr Rufus Q Bastian / Accounts / HW - Fund - ANZ Health Insurance Trial Scheme

There are no active referrals for this patient. Dr Hubert WOLFESCHLEGELSTEINHAUSENB requires a referral

Account is flagged Trial Scheme but patient's default account flag is Overseas

### Referral