Add Account Flags

Last Modified on 18/06/2021 9:06 am ACST

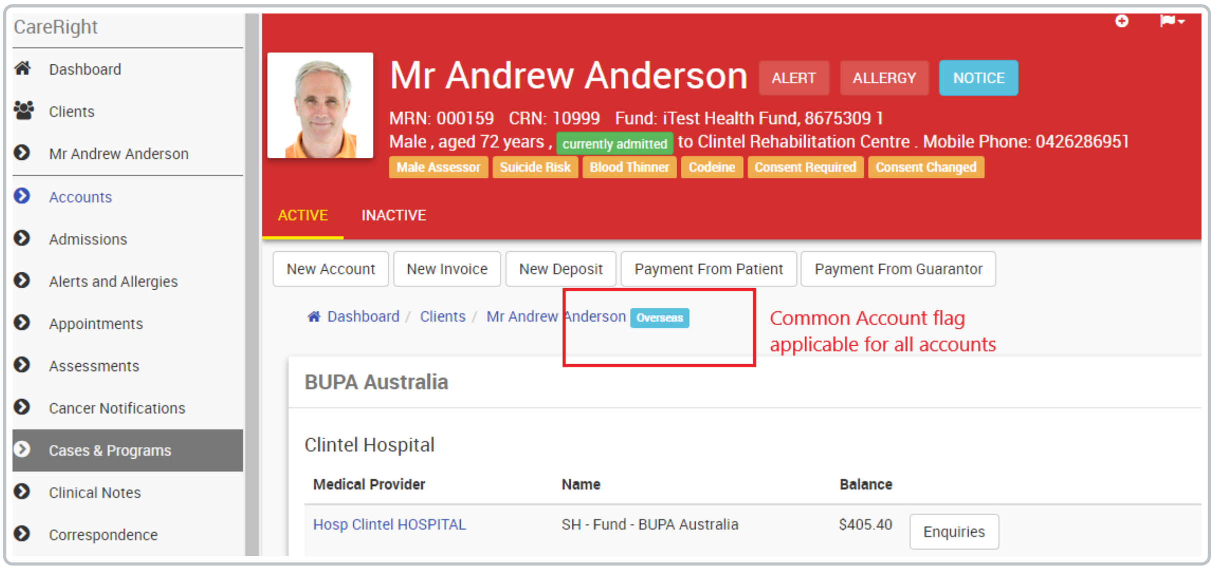
Patient Account Flags

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.

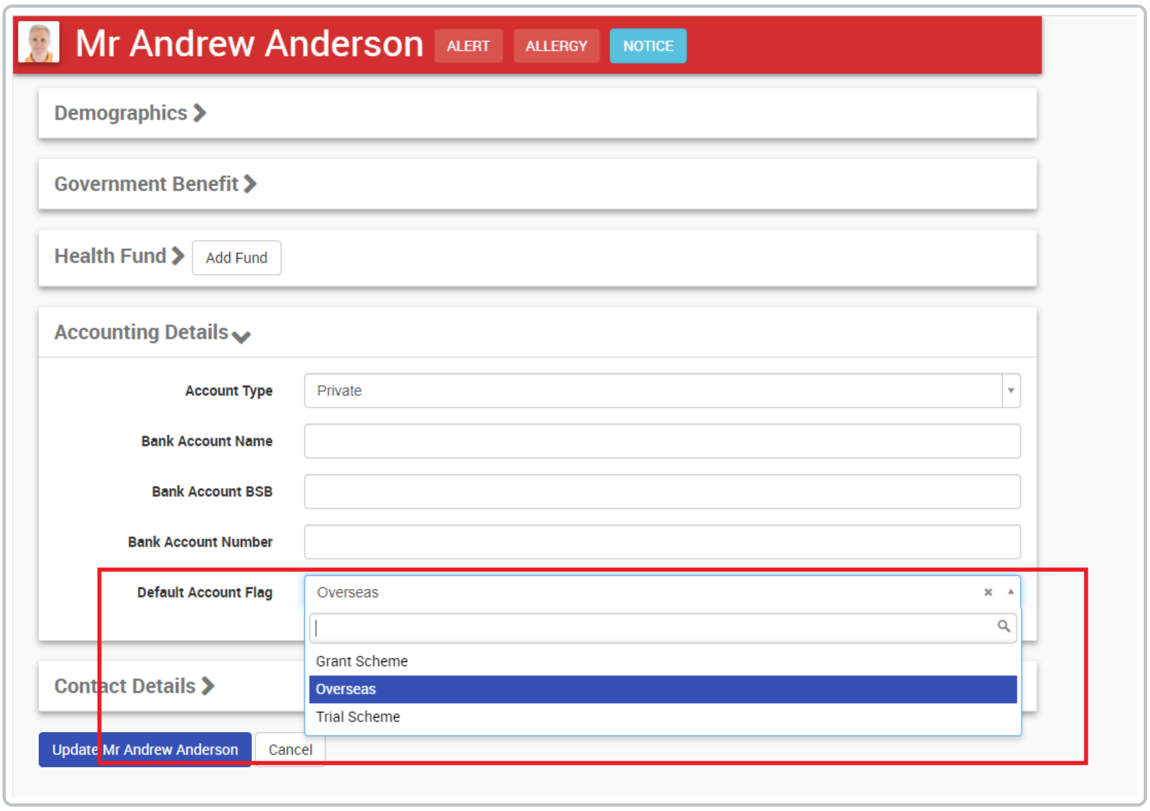
Account flags can be used in two different ways

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



To add this flag

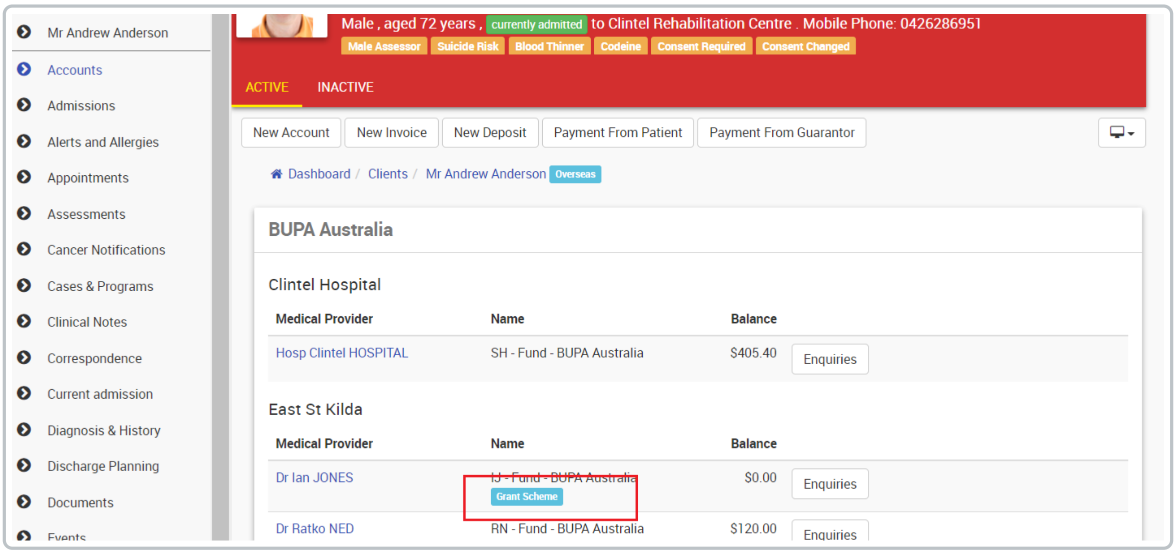
1. Find out the patient, Click **Summary**
2. Under the session **Accounting Details,** Select the **Default Account Flag** from the drop-down. (This list can be configured by the system administrator as you required, please refer to Create Account Flags in System Admin Guide.)
3. Click **update Patient**



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;

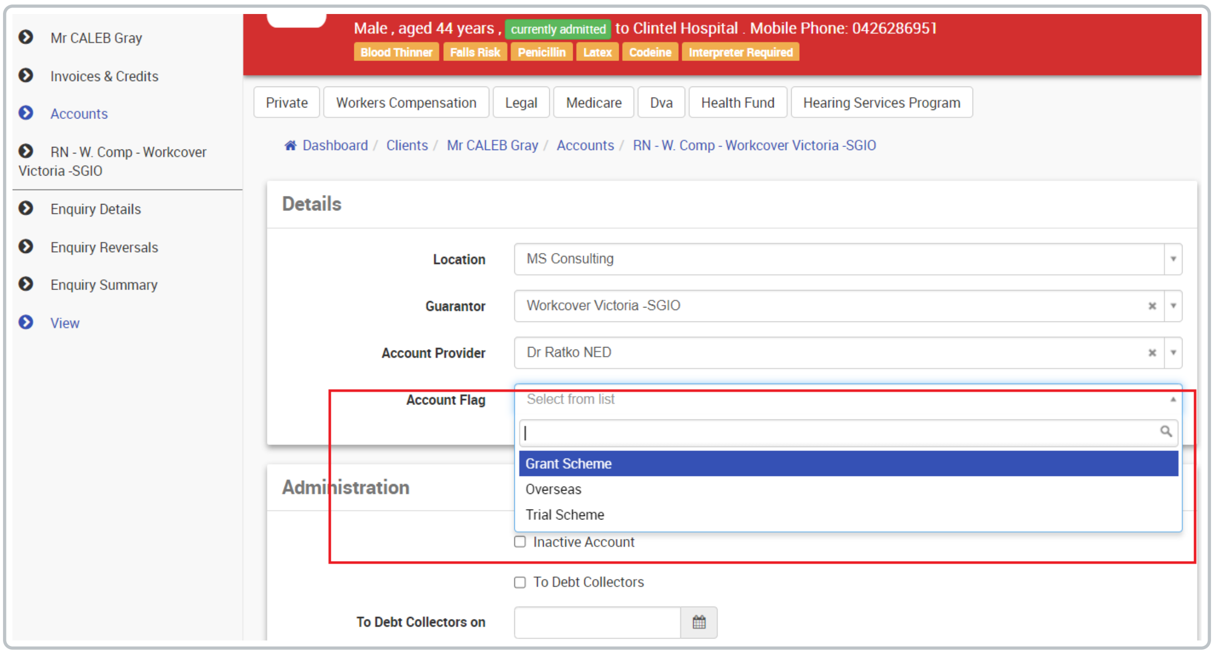
- The account has no Invoices/receipts or statements created ever
- No default account flags added to patient accounts.



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)



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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: