Account Flags Overview

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Overview

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 Add Account Flags in the User Guide for instructions on how to add account flags to patient accounts.

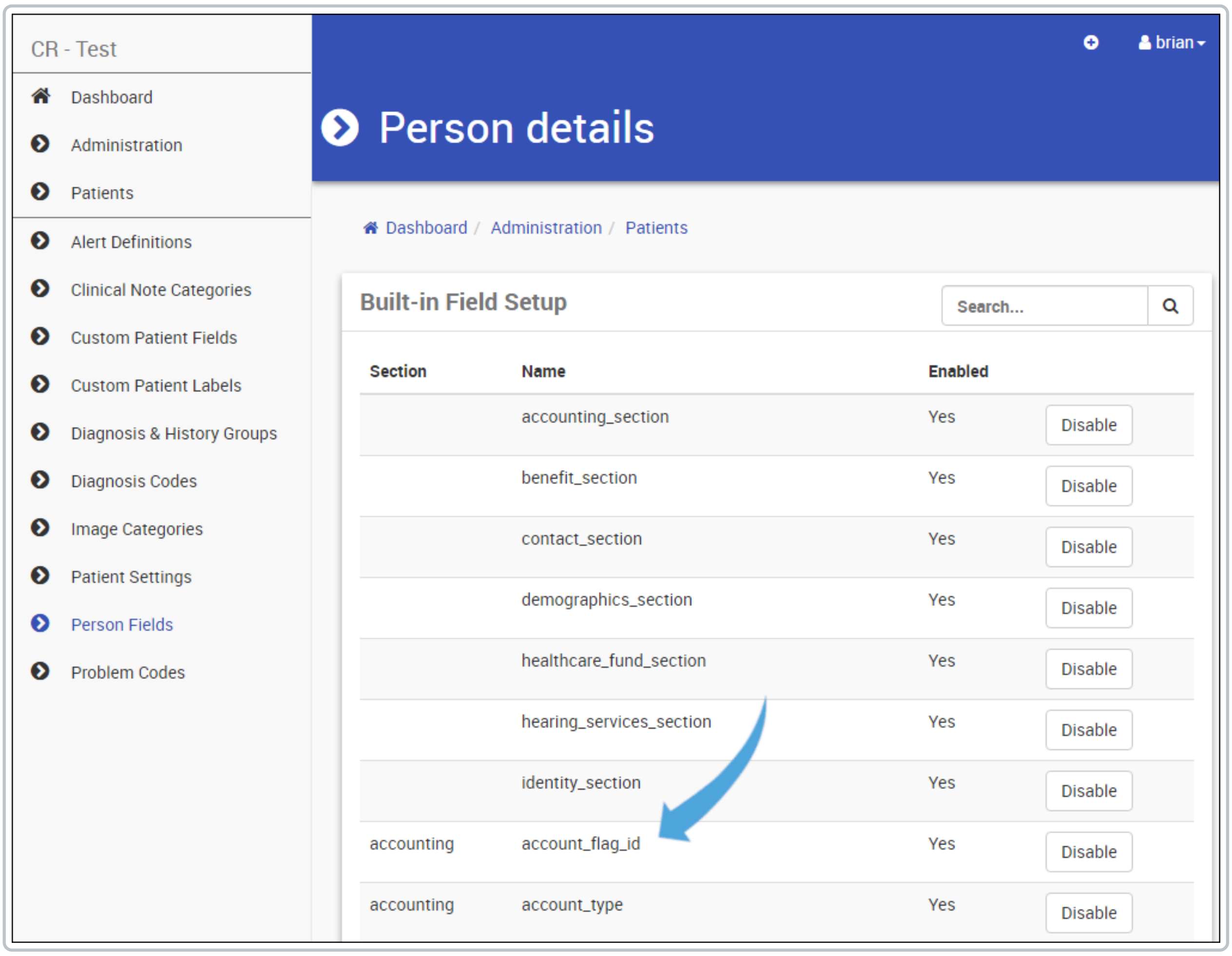
The rules for creating an account flag are:

- The name may contain alphanumeric and spaces only (eg "Overseas Patient", "Grant Scheme")
- The name must be unique

Valid name examples are "Overseas", "Grant Scheme", "Trial Scheme". A flag may be deleted or renamed only if it has never been applied to a patient account. Two steps of configurations are required for account flags in CareRight.

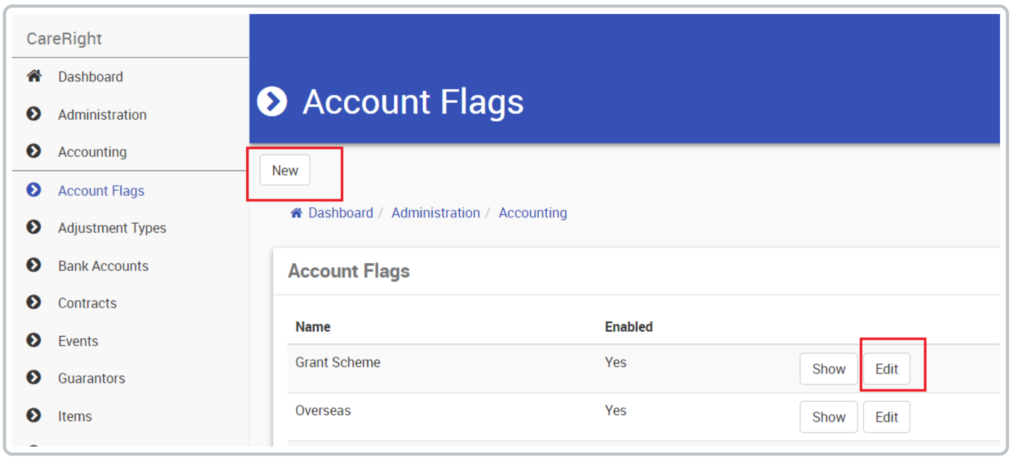
1. Enable Account Flags on Person Fields Setup

1. From Dashboard, click **Administration**
2. Click **Patients**
3. Then, select the **Person Fields**
4. Scroll down to accounting **account_flag_id** and click **Enable**
5. Confirm you are sure and click Ok



2. Create/Edit/Disable an Account Flag

1. From Administration, select **Accounting** in the Main Menu.
2. Select **Account Flags**.
3. For creating a new account flag,
   a. Click the **New** button at the top.
   b. Add flag **Name**
   c. Check the **Enabled check** box (checked by default)
   d. Click **Create Account Flag**
4. For editing an existing account flag,
   a. Click **Edit**
   b. Rename the account flag if needed.
   c. In the **Enabled** field, select or de-select the checkbox as needed.
   d. Click **Save**


CareRight
Dashboard
Administration
Accounting
Account Flags
Adjustment Types
Bank Accounts
Contracts
Events
Guarantors
Items
Account Flags
New
Dashboard / Administration / Accounting
Account Flags
Name
Enabled
Grant Scheme
Yes
Show
Edit
Overseas
Yes
Show
Edit