

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**

CR - Test

Dashboard

Administration

Patients

Alert Definitions

Clinical Note Categories

Custom Patient Fields

Custom Patient Labels

Diagnosis & History Groups

Diagnosis Codes

Image Categories

Patient Settings

Person Fields

Problem Codes

Person details

Dashboard / Administration / Patients

Built-in Field Setup

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Section	Name	Enabled
	accounting_section	Yes <div>Disable</div>
	benefit_section	Yes <div>Disable</div>
	contact_section	Yes <div>Disable</div>
	demographics_section	Yes <div>Disable</div>
	healthcare_fund_section	Yes <div>Disable</div>
	hearing_services_section	Yes <div>Disable</div>
	identity_section	Yes <div>Disable</div>
accounting	account_flag_id	Yes <div>Disable</div>
accounting	account_type	Yes <div>Disable</div>

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

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Account Flags

New

Dashboard / Administration / Accounting

Account Flags

Name	Enabled	
Grant Scheme	Yes	<div>ShowEdit</div>
Overseas	Yes	<div>ShowEdit</div>

