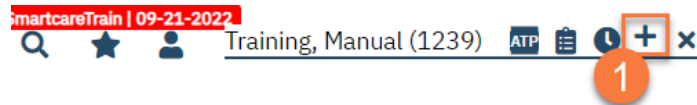# How to Create a Flag

1. Make sure you have the client open. Click the plus icon next to the client's name.



2. This takes you to the Client Flag Details screen.

a. **Select the type of flag**. Your system will have a list of flags to choose from.
b. **Select the level of the flag**. The options are: Information, Urgent, and Warning.
c. Make sure to **include your program**. This will ensure client privacy is upheld.
d Enter the specific language of the flag in the **Note field**.
e. **Enter the display date**. If there is a due date, enter the Open Date (date it became available) and the Due Date (the date the task is due.)
f. If you need to assign this task to a specific user, you can enter that information in. You can also assign this task based on the treatment team role. An example would be to alert all nurses working with the client of a lab that's due.
g. Enter any additional comments as needed.
h. You can also choose how the flag is displayed. If you want this flag to show as a pop-up when opening the client's chart, make sure to mark "Always Pop Up." **Note:** Right now, "Never Pop Up" is set as default and cannot be changed at this time.
i. Once you've entered all the information, **click Insert**.
j. This adds the flag to the Note List section at the bottom of the screen.



k. Once you've added all flags, **click Save**. You are now finished and may close this screen.

# How to Modify an Existing Flag

1. With the Client open, click on the icon related to the flag you're trying to update. If you don't see it, click on the Plus icon.
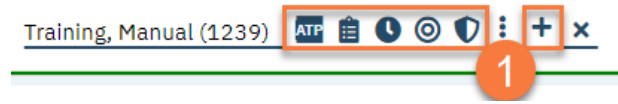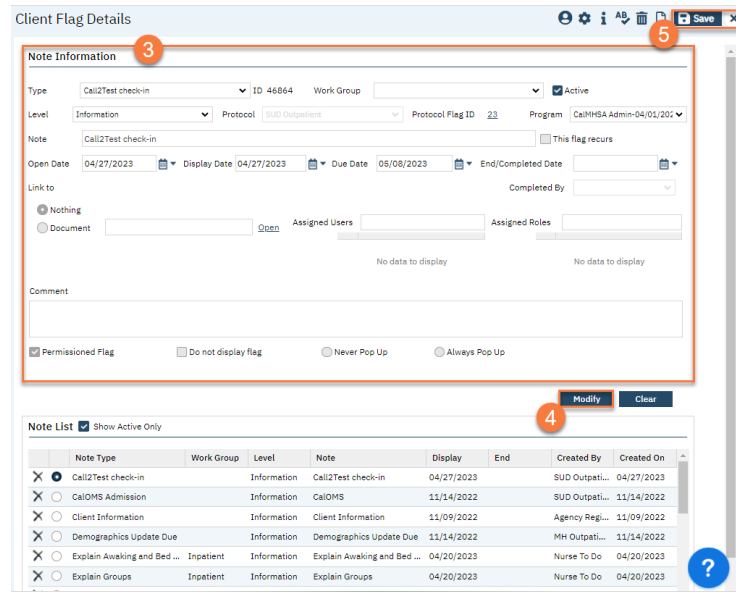


2. This takes you to the Client Flag Details screen. Select the flag you want to modify.
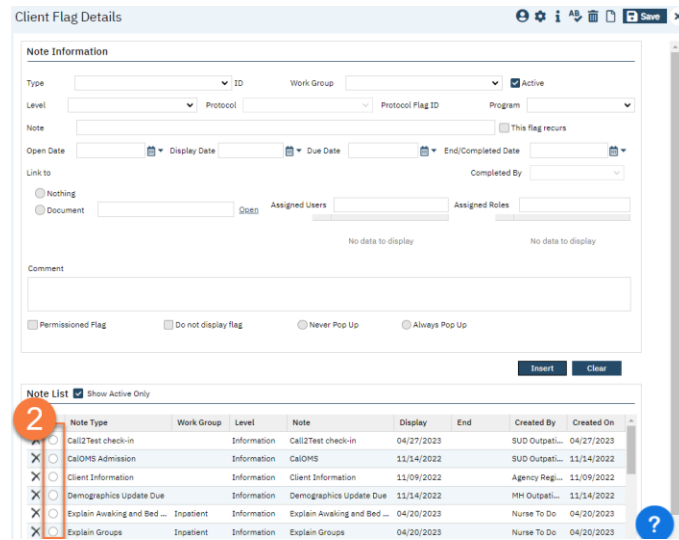


3. This brings the information to the top half of the screen. Make the edits in this section.
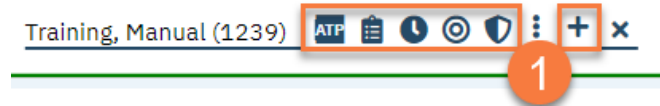
4. Click "Modify". This updates the flag.
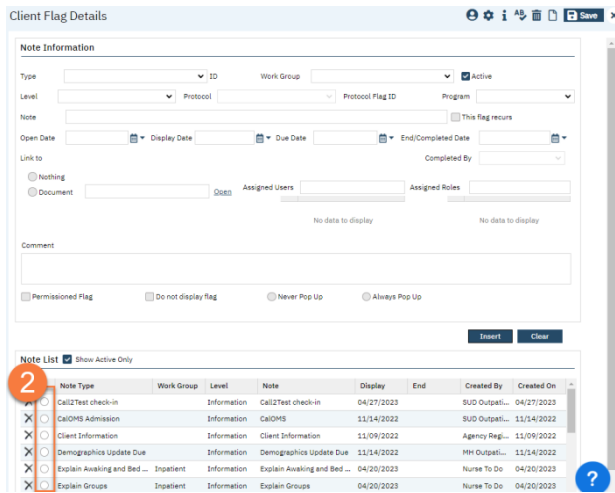
5. Click Save and close.

# How to Mark a Flag as Complete

1. With the Client open, click on the icon related to the flag you're trying to update. If you don't see it, click on the Plus icon.



2. This takes you to the Client Flag Details screen. Select the flag you want to complete.



3. This brings the information to the top half of the screen. Enter the "End/Completed Date" and the "Completed By" fields.

4. Click "Modify". This marks the flag as complete.

5. Click Save and close.