

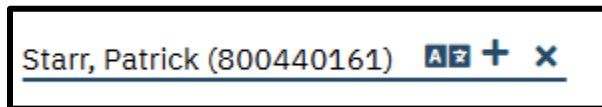
## Client Flags Tip Sheet

The instructions below walk through how to add and remove a Client Flag in SmartCare. Please refer to the County of Sacramento Quality Managements Policy and Procedure to determine what additional action items need to be done for each Client Flag, as well as the appropriate order for Flags.

This process may eventually change as the system is updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed, you can contact us at [bhs-ehrsupport@saccounty.gov](mailto:bhs-ehrsupport@saccounty.gov).

### What are Client Flags?

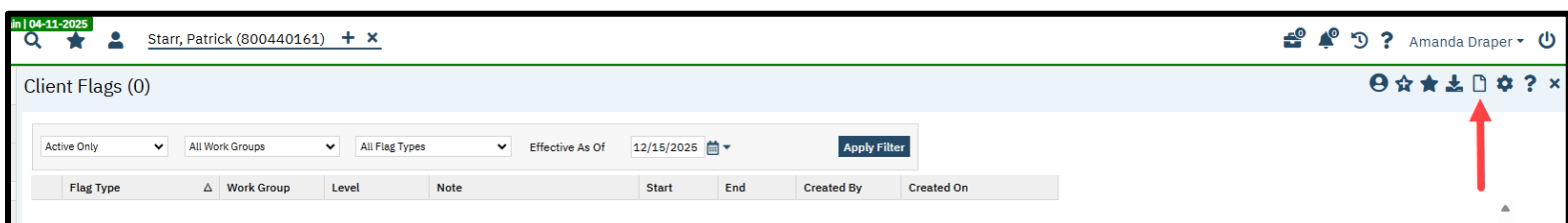
Client Flags are used to alert users when interacting with a client that has critical beneficiary support information. An icon which corresponds to the Client Flag will show up in the client header.



Some Client Flags are created automatically by SmartCare to send you an alert about the client. For example, flags are added for duplicate insurance or a preferred name. Client Flags can also be added by staff to alert others of critical information regarding the client.

### Adding a Client Flag

1. Open the **Client Flags (Client)** Screen with the client selected.
2. Click the new icon to create a new flag. This is shaped like a piece of paper with the corner folded over and located in the upper right-hand corner of the screen.



3. Choose the Type of Flag you are entering for this client and select the program.
4. Additionally, the "Level", "Note", "Open Date" and "Display Date" fields are all required and must be completed before you can save the data. Please note, the "Active" box is automatically selected.

Client Flag Details

Note Information

Type: Client does not speak english ID: 46865 Work Group:  ☒ Active

Level: Information Protocol:  Protocol Flag ID:  Program: xxxxSecCo-APSS-Broadway

Note: Client Speaks Spanish ☐ This flag recurs

Open Date: 12/15/2025 Display Date: 12/15/2025 Due Date:  End/Completed Date:

Completed By:

Link to:

☒ Nothing ☐ Document  Open Assigned Users:  Assigned Roles:

No data to display No data to display

5. Click Insert and then Save.

Client Flag Details

Note Information

Type: Client does not speak english ID: 46865 Work Group:  ☒ Active

Level: Information Protocol:  Protocol Flag ID:  Program: xxxxSecCo-APSS-Broadway

Note: Client speaks Spanish ☐ This flag recurs

Open Date: 12/15/2025 Display Date: 12/15/2025 Due Date:  End/Completed Date:

Completed By:

Link to:

☒ Nothing ☐ Document  Open Assigned Users:  Assigned Roles:

No data to display No data to display

Comment:

☐ Permissioned Flag ☐ Do not display flag ☐ Never Pop Up ☒ Always Pop Up

☒ Show Active Only

Insert Clear

6. The flag will populate in the client header, and the flag will show in the note list below.

04-11-2025 Starr, Patrick (800440161) [Icons]

### Client Flag Details

**Note Information**

Type: Client does not speak english ID: 46865 Work Group: [Dropdown] ☒ Active

Level: Information Protocol: [Dropdown] Protocol Flag ID: [Dropdown] Program: xxxxSacCo-APSS-Broadway

Note: Client Speaks Spanish ☐ This flag recurs

Open Date: 12/15/2025 Display Date: 12/15/2025 Due Date: [Dropdown] End/Completed Date: [Dropdown]

Completed By: [Dropdown]

Link to:

☒ Nothing ☐ Document [Text] [Open](#) Assigned Users: [Text] Assigned Roles: [Text]

No data to display No data to display

Comment: [Text Area]

☐ Permitted Flag ☐ Do not display flag ☐ Never Pop Up ☒ Always Pop Up

[Modify](#) [Clear](#)

**Note List** ☒ Show Active Only

	Note Type	Work Group	Level	Note	Display	End	Created By	Created On	Provider
X	Client does not spe...		Information	Client Speaks Span...	12/15/2025		drapera61	12/15/2025	

## Removing a Client Flag

1. Open the Client Flags (Client) screen with the client selected.
2. Select the Client Flag from the List Page you wish to end by clicking on the note hyperlink.

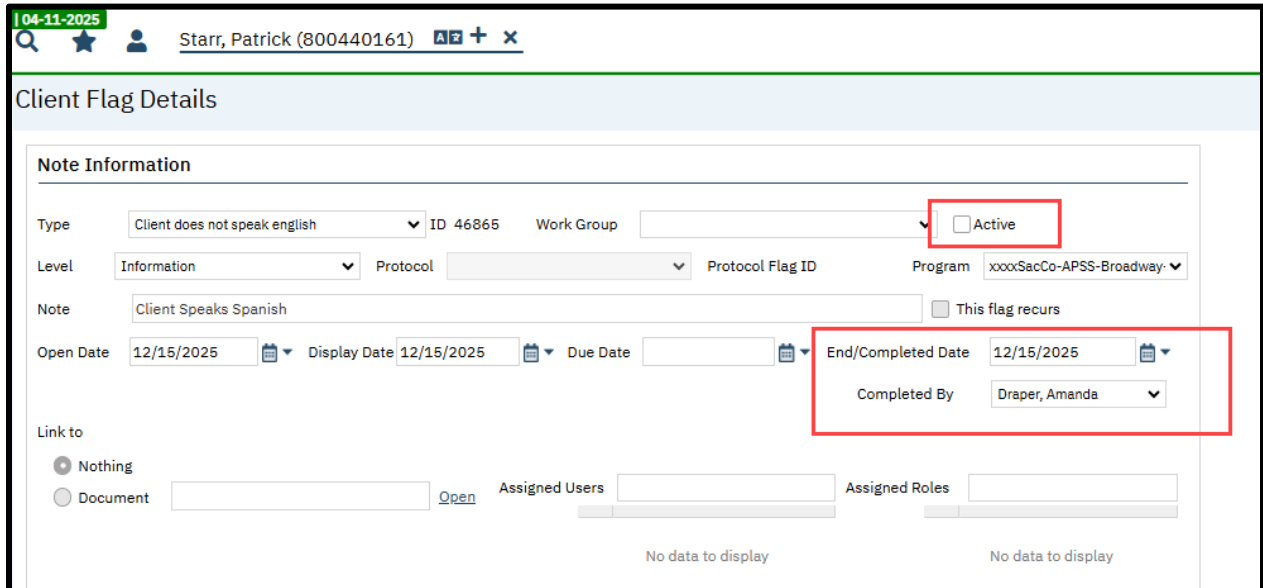
04-11-2025 Starr, Patrick (800440161) [Icons]

### Client Flags (1)

Active Only All Work Groups All Flag Types Effective As Of 12/15/2025 [Apply Filter](#)

Flag Type	Work Group	Level	Note	Start	End	Created By	Created On
Client does not speak engl...		Information	<a href="#">Client Speaks Spanish</a>	12/15/2025		drapera61	12/15/2025 10:29 AM

3. This will open the flag.
4. Complete the “End/Completed Date” and “Completed By” fields and de-select the active box.



**Client Flag Details**

**Note Information**

Type: Client does not speak english ID: 46865 Work Group: ☐ Active

Level: Information Protocol:  Protocol Flag ID:  Program: xxxxSacCo-APSS-Broadway

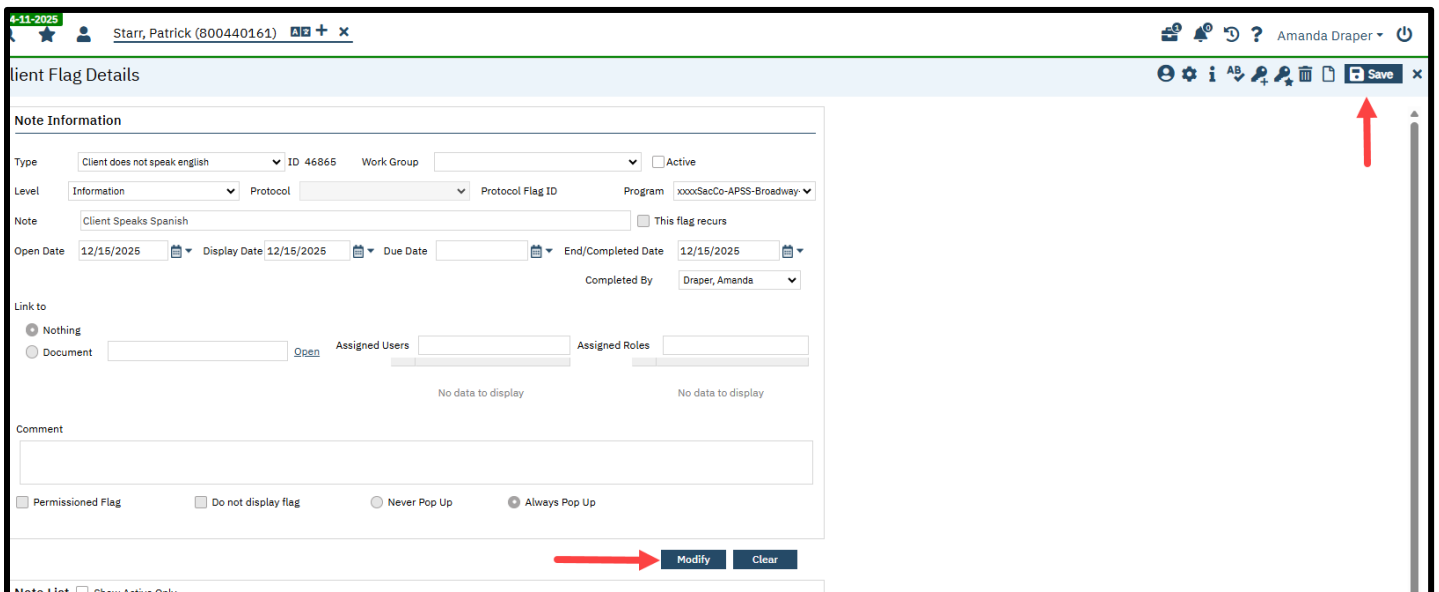
Note: Client Speaks Spanish ☐ This flag recurs

Open Date: 12/15/2025 Display Date: 12/15/2025 Due Date:  End/Completed Date: 12/15/2025 Completed By: Draper, Amanda

Link to: ☐ Nothing ☐ Document  [Open](#) Assigned Users:  Assigned Roles:

No data to display No data to display

5. Click the Modify button and then Save.



**Client Flag Details**

**Note Information**

Type: Client does not speak english ID: 46865 Work Group: ☐ Active

Level: Information Protocol:  Protocol Flag ID:  Program: xxxxSacCo-APSS-Broadway

Note: Client Speaks Spanish ☐ This flag recurs

Open Date: 12/15/2025 Display Date: 12/15/2025 Due Date:  End/Completed Date: 12/15/2025 Completed By: Draper, Amanda

Link to: ☐ Nothing ☐ Document  [Open](#) Assigned Users:  Assigned Roles:

No data to display No data to display

Comment:

☐ Permissioned Flag ☐ Do not display flag ☐ Never Pop Up ☒ Always Pop Up

[Modify](#) [Clear](#)

[Save](#)

6. After End Dating the Client Flag, the flag will no longer appear in the Client Header.
7. After de-activating a client flag, it will no longer show up on the notes list, but if you de-select “Show Active Only” you will see all the inactive client flags, as well as any active ones.

## Pregnancy Indicator

in | 04-11-2025

Test, Bunny (800440195) + x

## Client Flag Details

### Note Information

Type Pregnancy Indicator ID 46878 Work Group  ☒ Active

Level Urgent Protocol  Protocol Flag ID Program BACS-CWC CORE-4600 47t!

Note Client is Pregnant ☐ This flag recurs

Open Date 12/15/2025 Display Date 12/15/2025 Due Date 12/15/2026 End/Completed Date

Completed By

Link to  
☒ Nothing  
☐ Document  [Open](#)

Assigned Users  Assigned Roles

No data to display No data to display

Comment

☐ Permitted Flag ☐ Do not display flag ☐ Never Pop Up ☒ Always Pop Up