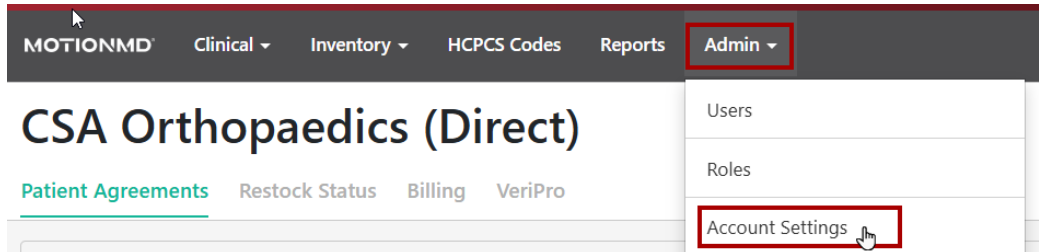


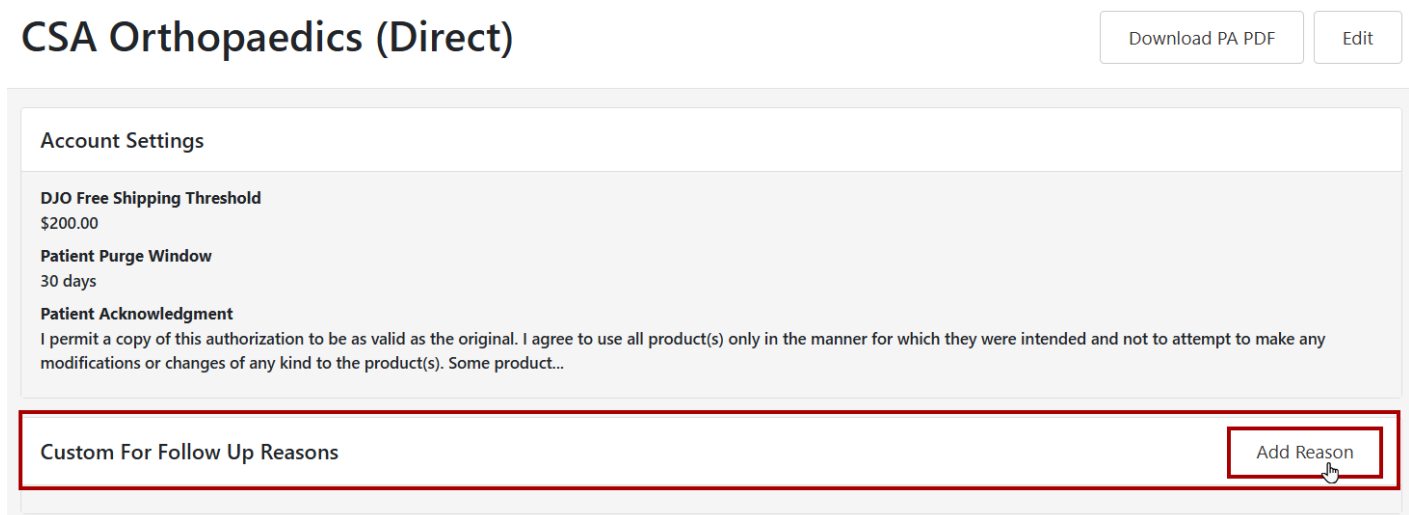
CUSTOM FOLLOW UP REASON FEATURE

This feature allows Premium Customers to manually add Custom Follow Up Reasons to the current list of Global Follow Up Reasons. Customers must have the Follow Up feature enabled to add and manage Custom Follow Up Reasons. Users with the Admin role will be able to access this feature.

To view the feature, navigate to the Admin dropdown in the navigation bar and select 'Account Settings'.

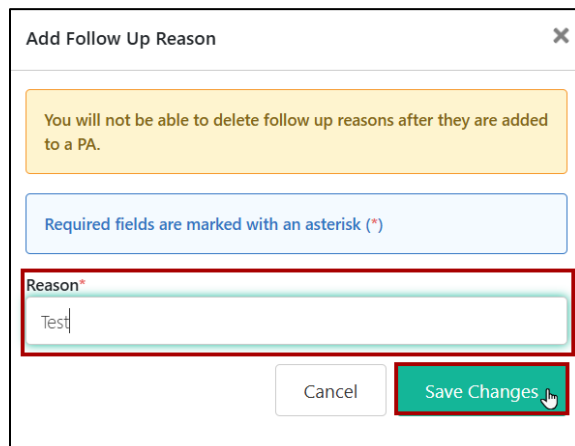


The 'Custom For Follow Up Reasons' section will be displayed. Click the 'Add Reason' button to add a new Reason.



A modal will open to add the custom Reason title, then click 'Save Changes'.

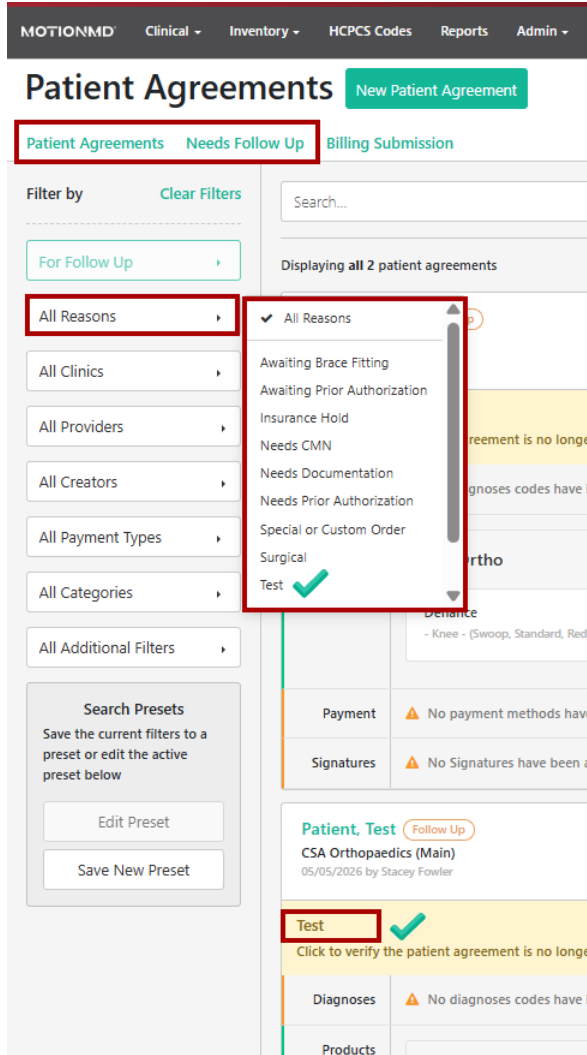
Note: There is a 40-character limit to a Reason title, but no limit on how many Reasons can be added.



CUSTOM FOLLOW UP REASON FEATURE

Once the new Reason is added, it's visible on the 'All Reasons' dropdown filter list on the Patient Agreements tab and on the Needs Follow Up tab.

Any Custom Reason added will be listed alphabetically with the Global Follow Up Reason list.



Note:

- When a Custom Follow Up Reason is in use or tied to a PA, it cannot be removed from the list of Custom Reasons; the remove button is greyed out. Once the Reason is no longer tied to any PA, it can be removed from the list.
- The Reason can be Edited at any time. If it is tied to a PA, the Follow Up Reason will be updated on the PA.

