



How to Add or Update Flags on a Report

1. Do you need to review the report with flags on it?

To review the report as a PDF with the flags displayed, continue to Step 2. Otherwise, to go directly to flag review, proceed to Step 6.

Case File No.	Incapacitated Person	Report	Flags	Accepted By	Date
OC-1001-2021	Hollings, Kathryn	Person	0	aopc_admin32	11:17 PM

2. Access the Report Details popup

On the Ready for Review tab on your Dashboard, click the View Report Details icon.

Case File Number	Incapacitated Person	Report	Guardian(s)	Counsel
OC-1001-2021	Hollings, Kathryn	Annual Report of the Person	Hollings, Gregory	

Document(s)	File
Annual Report of the Person.pdf	

Flag Details
Number of Flags
1

3. Open the report with flags

In the Report Details popup, click the View Report with Flags icon.

6. During this **Report Period**, was a Protection from Abuse Order entered against any guardian?

Yes - Please describe No

Guardian Name Description

4. Review the flags displayed in the report

The printable version of the report opens in a new tab. Flags are displayed in the margin of the question that caused the concern. Review the information provided by the guardian.

5. Return to the Web Portal

Close the tab displaying the report to return to the Web Portal so you can continue

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6. Access the Flag Review screen

Back in the Report Details popup, click on the Flag Review icon.

Tip If you did not review the report with flags on it, the same icon is available in the Ready for Review tab of the Dashboard.

The screenshot shows the 'Report Details' screen with a table containing the following data:

Case File Number	Incapacitated Person	Report	Guardian(s)	Counsel
OC-1001-2021	Hollings, Katheryn	Annual Report of the Person	Hollings, Gregory	

Below the table, there is a 'Document(s)' section with a table:

Document	File
Annual Report of the Person.pdf	

At the bottom, there is a 'Flag Details' section with a table:

Number of Flags
1

A black line with a dot at the end points from the 'Flag Review' icon in the 'Flag Details' table to the 'Add/Edit Flag' popup shown in the next step.

The screenshot shows the 'Add/Edit Flag' popup with a table containing the following data:

Priority	Flag Rule Name	Description	Concern	Previous report
Low	Questionable Activity - PFA	The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period.	New	

A black line with a dot at the end points from the 'Edit Flag' icon in the 'Previous report' column to the 'Add/Edit Flag' popup shown in the next step.

7. Access the Add/Edit Flag popup

On the Flag Review screen, find the question that generated a concern and click the Edit Flag icon.



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8. Update the flag status

Select the **Concern Status** and record **Comments**.

Status	Comment	Create Date	Create User
New	System Generated	3/24/2025 11:24:10 AM	System Generated

Concern Type: Guardian Cited with Protection from / v

* Description: The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period. (369 characters remaining)

* Concern Status: Resolved v

* Comment: A case action for change of guardian has been filed by Peter Nolan. (433 characters remaining)

Submit

9. Click **SUBMIT**

10. Address additional flags

If there are other flags associated to the questions, repeat Steps 7-9 as needed.

11. Do you need to add a manual flag?

If you need to add manual flags to any questions, continue to Step 12. Otherwise, proceed to Step 16.

12. Access the Add/Edit Flag popup

Locate the question on the report that raised a concern and click the Add Manual Flag icon.

3. Have you maintained a log of your activities as a guardian?

Priority	Flag Rule Name	Description	Concern Status	Set c
No results found				

Guardian Activity Log: No

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13. Record the flag details

Tip If a flag was added in error, change the **Concern Status** to 'Resolved' or 'No Concern' and record a **Comment** to indicate it was added in error.

14. Click SUBMIT

15. Add additional manual flags

If other manual flags need to be added, repeat Steps 12-14 as needed.

16. Save and close the report

At the bottom of the Flag Review screen, ensure the **Close** radio button is selected and click OK.