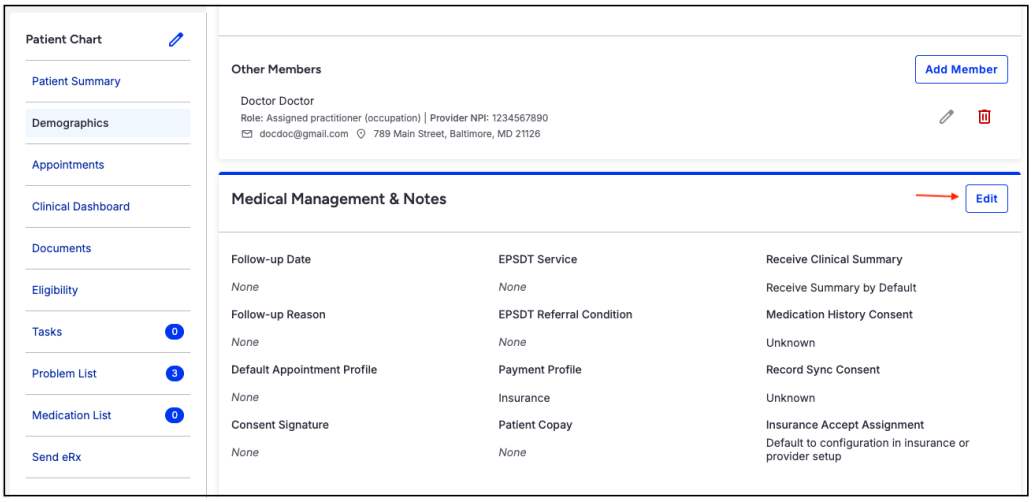
Patient Level Override - Insurance Accept Assignment

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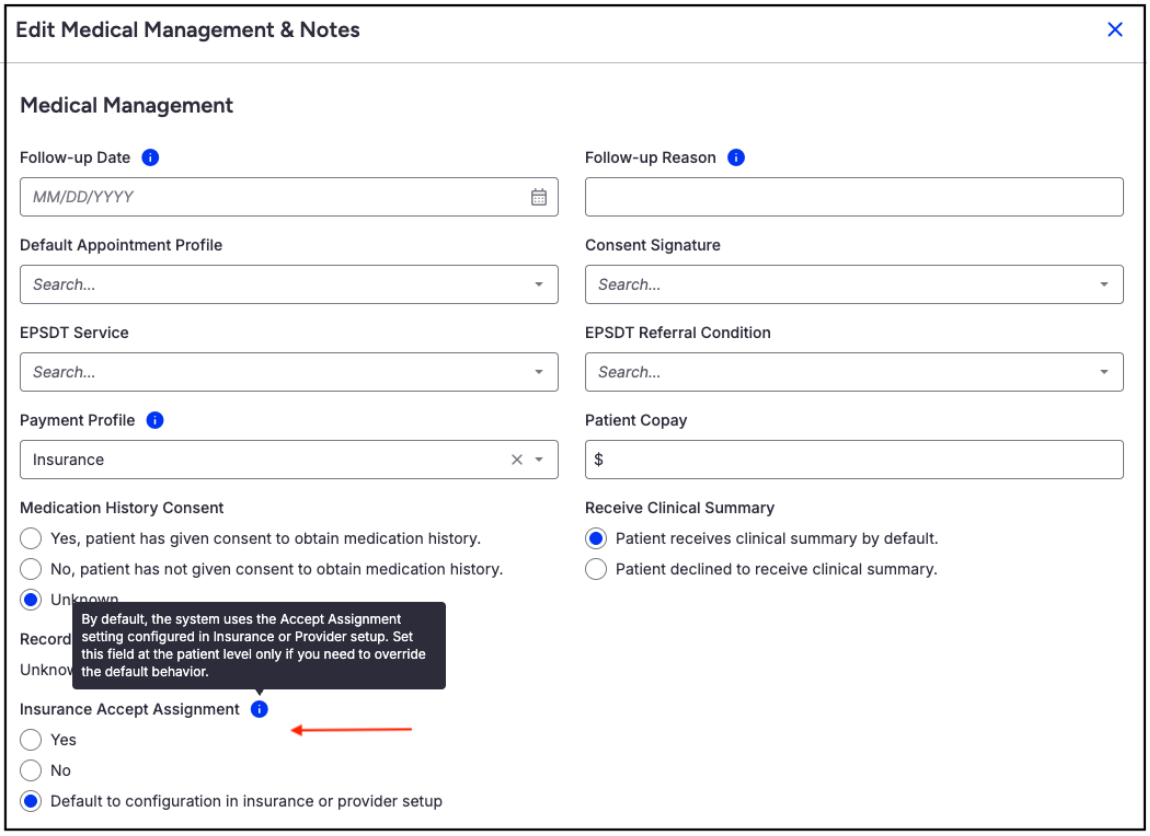
The **Insurance Accept Assignment** field can be configured at the patient level to override the default assignment settings defined in Insurance Setup or Doctor Settings. This option allows practices to control assignment behavior for individual patients when needed, while maintaining existing defaults for all others.

Where to Find the Field

1. Navigate to the patient's chart > Demographics tab
2. Scroll down to the Medical Management & Notes section
3. Select Edit



4. Navigate to the Insurance Accept Assignment on the bottom left. This section is to be used when an override is required for a particular patient/payer.
    a. **Yes** - will set the assignment for the individual patient to accept the insurance assignment.
    b. **No** - will set the assignment for the individual patient to not accept the insurance assignment.
    c. **Default** - will default to the value set under the Insurance or Provider setup.



How Assignment Priority Works

The system determines the Accept Assignment value using the following priority order:

1. **Patient-Level Override**
   If the field is set to **Yes** or **No**, that value overrides all other configurations.

2. **Insurance Setup**
   If the patient-level field is **blank**, the system uses the **Accept Assignment** checkbox configured in **Billing > Insurance Setup**.

3. **Doctor Settings**
   If the patient-level field is blank and no insurance record exists in Insurance Setup, the system falls back to **Doctor Settings > Insurance Assignment Not Accepted**

Audit Logging

Any change to the **Insurance Accept Assignment** field is recorded in the **Audit Log**, including:

- Previous value, New value, the user who made the change, and the timestamp of the update.

Claim Form and EDI Behavior

The assignment value determines how information is populated on claim forms and in EDI submissions.

If Insurance Accept Assignment = Yes

- **HCFA Form**
  - Box 13: *Signature on File*
  - Box 27: Not selected
- **EDI 837 (CLM Segment)**
  - CLM06: **A**
  - CLM07: **Y**

If Insurance Accept Assignment = No

- **HCFA Form**
  - Box 13: Blank
  - Box 27: Not selected
- **EDI 837 (CLM Segment)**
  - CLM06: **C**
  - CLM07: **N**

This enhancement ensures consistent claim behavior while giving practices the flexibility to override assignment settings for specific patients when necessary.