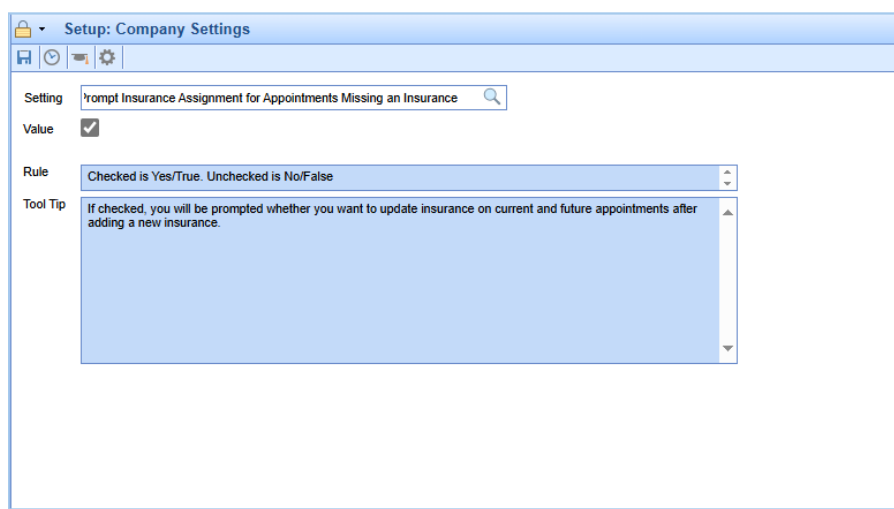


# Company Setting: Prompt Insurance Assignment for Appointments Missing an Insurance

Last Modified on 05/23/2025 12:23 pm EDT

The **Prompt Insurance Assignment for Appointments Missing an Insurance** company setting allows users to automatically update any current and future appointments missing insurance with the newly added insurance via a prompt. Enabling this setting will eliminate the need for users to manually assign newly added insurances to the patient's current and future appointments. Instead, the system will prompt the user if the new insurance coverage is set to 1, 2, or 3. If so, the prompt will offer the option to update all current and future appointments, update only the current and future appointments with missing insurances, or make no changes.



## Steps to Complete

1. **Navigate & Search** for the Company Setting: "**Prompt Insurance Assignment for Appointments Missing an Insurance**"
2. Set the Value to the **Checked Position** (described in detail below)
3. **Save**

## Value Options

### Unchecked = No/False

Users will not be prompted to update insurance on current and future appointments after adding a new insurance.

### Checked =Yes/True

Users will be prompted to update insurance on current and future appointments after adding a new insurance.

## Assign Insurance to Appointment Prompt

Once turned on, upon changing a patient's insurance, the user will receive a prompt asking if they would like to update current and future appointments with this insurance, along with options to:

- **Update all current and future appointments**
- **Update all current and future appointments with missing insurances**
- **Do not update current and future appointments**

### Assign Insurance to Appointment

Would you like to update current and future existing appointments with this insurance?

- ☐ Update all current and future appointments
- ☐ Update all current and future appointments with missing insurances
- ☒ Do not update current and future appointments

Submit

---