


## Medics CHS Scheduling Guide

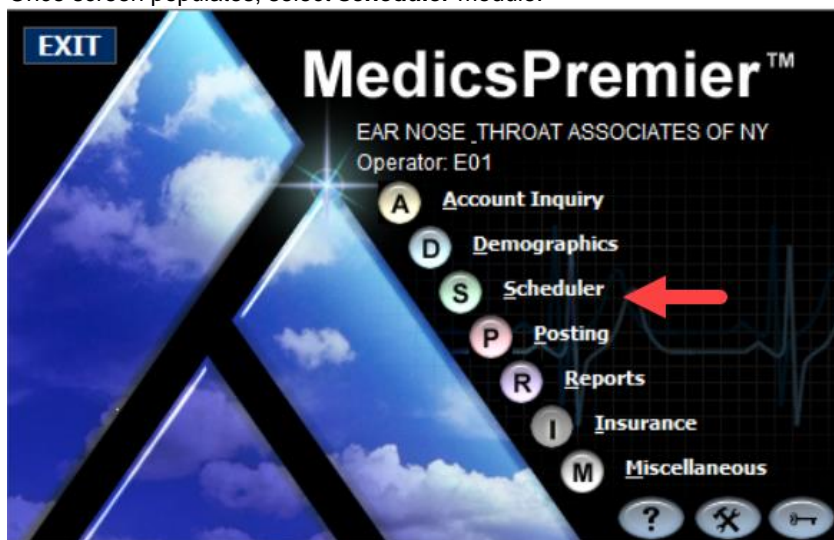
Log into Medics with your username and password.

Please note, after signing in on a machine for the first time, the username will remain and only the password will need to be entered.



The login screen for MedicsPremier features a large stylized 'A' logo on the left. On the right, there are input fields for 'User ID: E01', 'Password:' (with a red arrow pointing to it), and 'Entity: 1'. Below these fields are 'Login' and 'Settings' buttons. An 'EXIT' button is in the top left corner.

Once screen populates, select **scheduler** module.



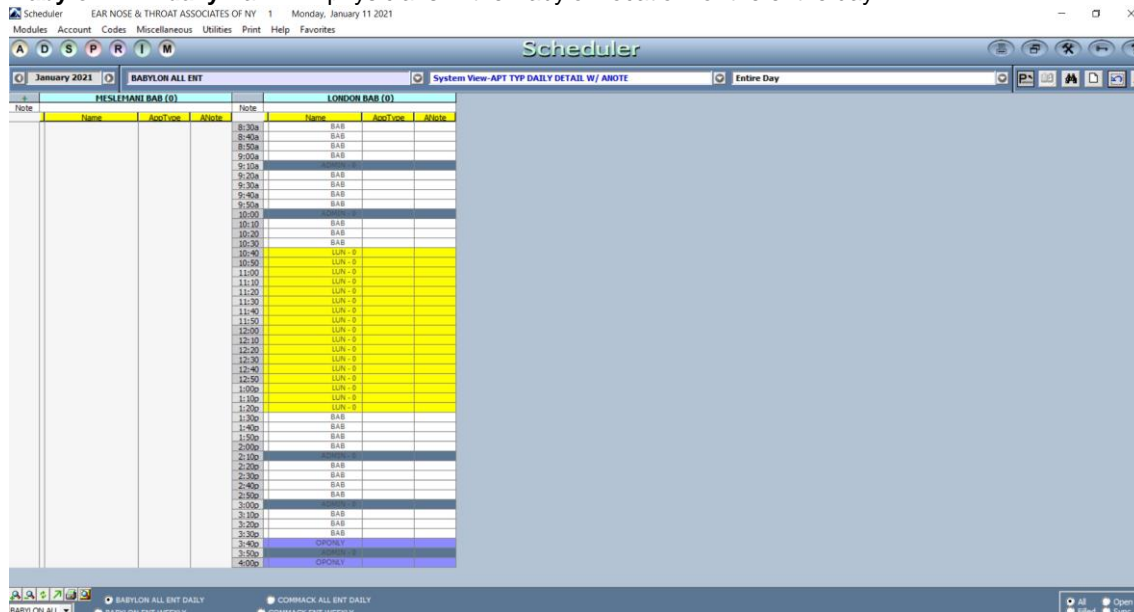
The main menu screen displays the 'MedicsPremier' title and 'EAR NOSE THROAT ASSOCIATES OF NY Operator: E01'. A list of modules is shown with circular icons: 'A' Account Inquiry, 'D' Demographics, 'S' Scheduler (highlighted with a red arrow), 'P' Posting, 'R' Reports, 'I' Insurance, and 'M' Miscellaneous. At the bottom are icons for help, search, and a key.

## Medics Scheduler View Screens

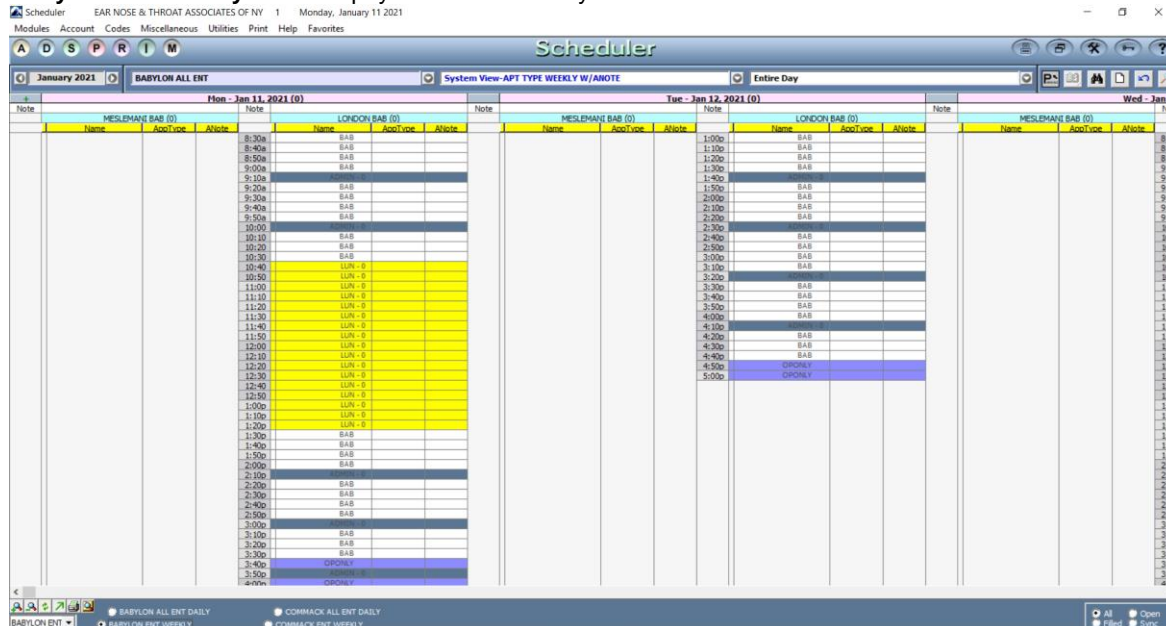
This screen is your main screen you will navigate from.

On the bottom of the screen you will find preset buttons. Preset buttons are favorite buttons specific to a view for an office.

### Babylon ENT daily - all ENT physicians in the Babylon location for the entire day



### Babylon ENT weekly - all ENT physicians in the Babylon location for the entire week

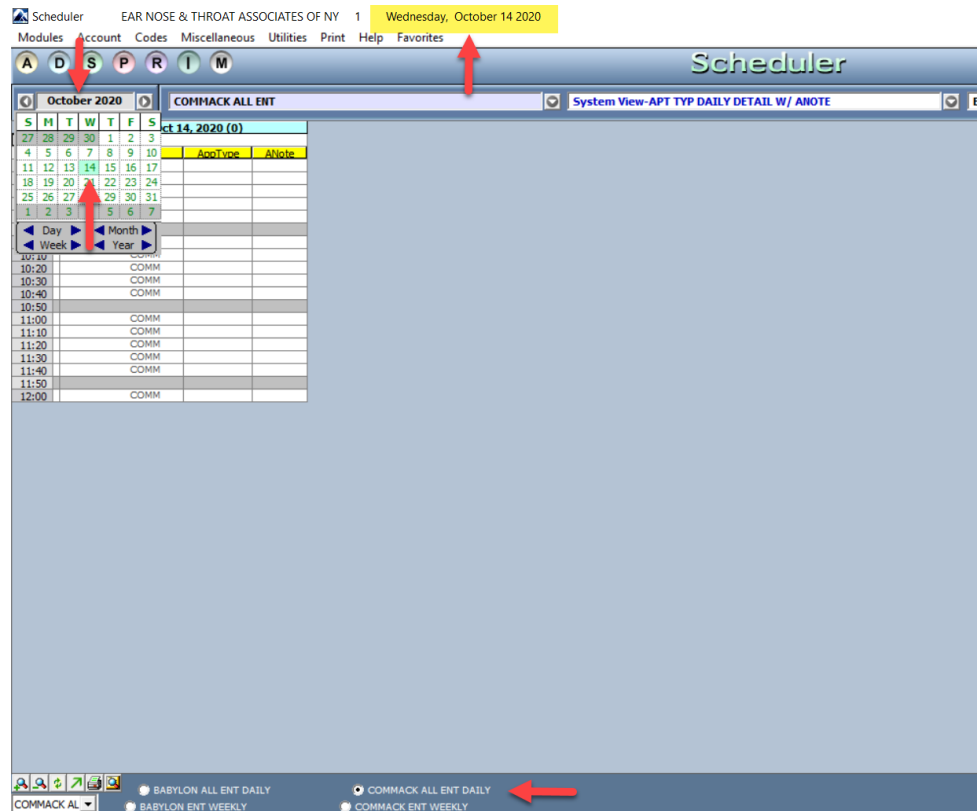


### Commack ENT daily - all ENT physicians in the Commack location for the entire day

### Commack ENT weekly - all ENT physicians in the Commack location for the entire day

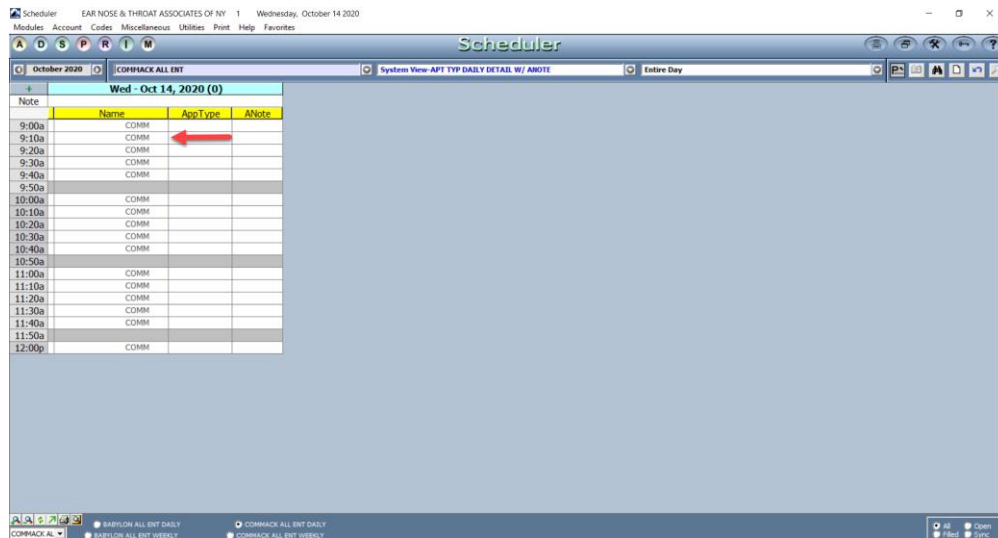
The calendar, located on the top left, allows you to select the date you are looking for. If you are in a daily preset view it will default to that **day**. If you are in a weekly view it will default to that **week**.

The date you are on will always reflect on the top of the screen as a reminder. (See highlighted image below)



## Searching for a patient when making an appointment/ Scheduling a New Patient

When you have navigated to the desired date and time for an appointment, double click on the blank slot to open.

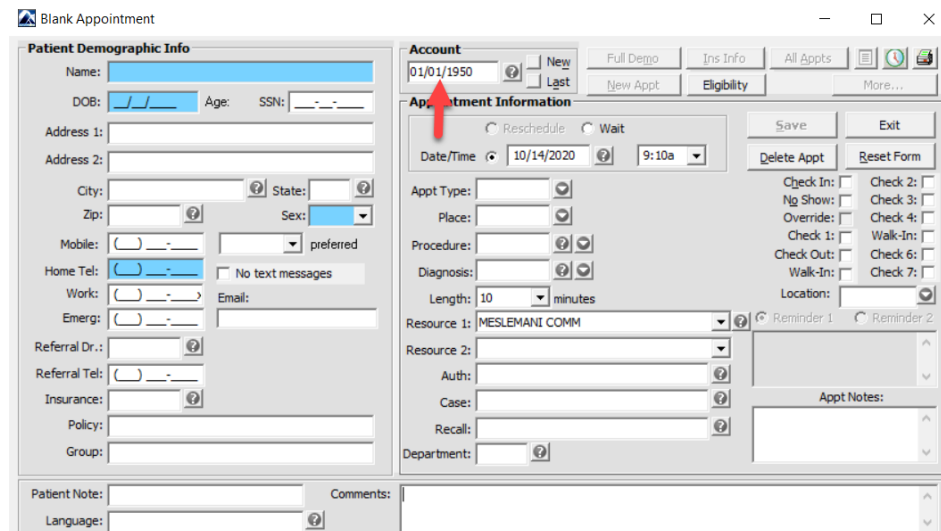


The screenshot shows the 'Scheduler' application window. The title bar indicates 'EAR NOSE & THROAT ASSOCIATES OF NY' and the date 'Wednesday, October 14, 2020'. The main window displays a calendar view for 'Wed - Oct 14, 2020 (0)'. A table lists appointment slots from 9:00a to 12:00p. A red arrow points to the 9:10a slot, which is currently blank. The table has columns for 'Name', 'App Type', and 'A Note'. The status bar at the bottom shows 'COMMRACK ALL ENT' and 'System View-APT TYP DAILY DETAIL W/ ANOTE'.

A blank appointment screen will populate but the patient must be searched for in the database first to ensure they are not already in the system.

The patient should be searched by **DOB** but can also be searched for by name.

To search for a patient, when the blank appointment opens, ask the patient for their DOB, type it into the enter it into the **account** field and hit enter.



The screenshot shows the 'Blank Appointment' form. The 'Patient Demographic Info' section includes fields for Name, DOB, Age, SSN, Address 1, Address 2, City, State, Zip, Sex, Mobile, Home Tel, Work, Email, Emerg, Referral Dr., Referral Tel, Insurance, Policy, and Group. The 'Appointment Information' section includes a 'Reschedule' or 'Wait' button, 'Date/Time' (10/14/2020, 9:10a), 'Appt Type', 'Place', 'Procedure', 'Diagnosis', 'Length' (10 minutes), 'Resource 1' (MESLEMANI COMM), 'Resource 2', 'Auth', 'Case', 'Recall', and 'Department'. A red arrow points to the 'Account' field, which contains the DOB '01/01/1950'. The 'Appt Notes' section is at the bottom right.

A list of all patients with that DOB in the Medics database will populate. Verify the patients name to ensure they are not in the list.

**Patient Lookup**

Look For: 01/01/1950 Search

Search by: ☐ Acc# ☒ Pat Name ☐ Guar ☐ DOB ☐ Policy# ☐ SS# ☐ Trans# ☐ MR# ☐ Phone# ☐ Claim# ☐ Enc

Patient Name	Account #	SS #	MR #	DOB	Telephone #	Cell #	AR	Balance	Pat Bal
ANNE, JOYCE	21217	007446156		01/01/1950	845/961-2446		CM	\$0.00	
NICHOLSON, LISA	21211	124381480		01/01/1950	752/381-6826		BS	\$0.00	
DAHL, MARCE	27438	080886303		01/01/1980	347/934-7331		CM	\$0.00	\$0.00
BLU, JACQUE	76694	114481566		01/01/1950	718/544-8147		BS	\$0.00	\$0.00
WILSON, DENNIS	58760	060384991		01/01/1950	631/738-2554		CO	\$0.00	
MARCE, COLANDA	57237	085278803		01/01/1950	718/476-8123		BS	\$0.00	
KATACK, VITOLOS	76643	100964918		01/01/1950	718/661-9898		CM	\$0.00	
GARCE, MARCE	76690	067743051		01/01/1950	646/912-4711		CM	\$0.00	\$0.00
CONCHURY, MOSAMMET	88318	000880000		01/01/1950	718/287-8817		CM	\$0.00	
JITTE, SANDRA	82426	055021444		01/01/1950	718/671-5843		CM	\$0.00	
LAUCHON, ROSA	98257	079673863		01/01/1950	718/328-3105		CM	\$0.00	
MOLANO, ARABAY	105747	050880884		01/01/1950	646/417-2564		CM	\$0.00	\$0.00
HADEN, DINO	127688	060780830		01/01/1950	617/468-3547		CM	\$0.00	
GAYRON, ANNE	133154	075844363		01/01/1950	718/766-5275		CM	\$0.00	
SHAR, JAVCE	146404	118423739		01/01/1950	348/963-3383		CM	\$0.00	
CLUBB, SERGEA	161236	094380668		01/01/1950	631/849-7611		CM	\$0.00	
MARTYLLONA, C. ROSE	171656	150477170		01/01/1950	718/641-2676		CM	\$0.00	\$0.00
BALLACHES, SERGEA	176684	110747630		01/01/1950	718/614-5544	718/640-3344	CM	\$0.00	\$0.00
BORGONZO, NATALIE T	188173	064428138		01/01/1950	718/746-8330		CO	\$0.00	\$0.00
HALEO, MARYANN	204263	076625746		01/01/1950	718/712-6258	347/463-5555	CM	\$0.00	\$0.00
ROSE, ROSA	215134	110000115		01/01/1950	718/328-3105		CM	\$0.00	\$0.00

Showing: 21

Display OK Cancel

Once you have verified the patient is not in the list, select the **X** on top right or **cancel** on bottom right to close screen.

**Patient Lookup**

Look For: 01/01/1950 Search

Search by: ☐ Acc# ☒ Pat Name ☐ Guar ☐ DOB ☐ Policy# ☐ SS# ☐ Trans# ☐ MR# ☐ Phone# ☐ Claim# ☐ Enc

Patient Name	Account #	SS #	MR #	DOB	Telephone #	Cell #	AR	Balance	Pat Bal
ANNE, JOYCE	21217	007446156		01/01/1950	845/961-2446		CM	\$0.00	
NICHOLSON, LISA	21211	124381480		01/01/1950	752/381-6826		BS	\$0.00	
DAHL, MARCE	27438	080886303		01/01/1980	347/934-7331		CM	\$0.00	\$0.00
BLU, JACQUE	76694	114481566		01/01/1950	718/544-8147		BS	\$0.00	\$0.00
WILSON, DENNIS	58760	060384991		01/01/1950	631/738-2554		CO	\$0.00	
MARCE, COLANDA	57237	085278803		01/01/1950	718/476-8123		BS	\$0.00	
KATACK, VITOLOS	76643	100964918		01/01/1950	718/661-9898		CM	\$0.00	
GARCE, MARCE	76690	067743051		01/01/1950	646/912-4711		CM	\$0.00	\$0.00
CONCHURY, MOSAMMET	88318	000880000		01/01/1950	718/287-8817		CM	\$0.00	
JITTE, SANDRA	82426	055021444		01/01/1950	718/671-5843		CM	\$0.00	
LAUCHON, ROSA	98257	079673863		01/01/1950	718/328-3105		CM	\$0.00	
MOLANO, ARABAY	105747	050880884		01/01/1950	646/417-2564		CM	\$0.00	\$0.00
HADEN, DINO	127688	060780830		01/01/1950	617/468-3547		CM	\$0.00	
GAYRON, ANNE	133154	075844363		01/01/1950	718/766-5275		CM	\$0.00	
SHAR, JAVCE	146404	118423739		01/01/1950	348/963-3383		CM	\$0.00	
CLUBB, SERGEA	161236	094380668		01/01/1950	631/849-7611		CM	\$0.00	
MARTYLLONA, C. ROSE	171656	150477170		01/01/1950	718/641-2676		CM	\$0.00	\$0.00
BALLACHES, SERGEA	176684	110747630		01/01/1950	718/614-5544	718/640-3344	CM	\$0.00	\$0.00
BORGONZO, NATALIE T	188173	064428138		01/01/1950	718/746-8330		CO	\$0.00	\$0.00
HALEO, MARYANN	204263	076625746		01/01/1950	718/712-6258	347/463-5555	CM	\$0.00	\$0.00
ROSE, ROSA	215134	110000115		01/01/1950	718/328-3105		CM	\$0.00	\$0.00

Showing: 21

Display OK Cancel

You will be prompted to the original appointment screen where the following information is required to make an appointment:

<b>Last Name, First Name</b>	EX: SAMPLE, TOM
<b>Date of Birth</b>	00/00/0000
<b>Complete address</b>	Street, Apartment #, Zip code
<b>Telephone Number</b>	If patient lists mobile number as only point of contact, put it into the home number field
<b>Insurance</b>	Search by insurance code preferred. Searching by insurance name will pull broader search
<b>Insurance ID</b>	ID number for insurance. If there is a secondary list the name and ID in <b>patient note</b>
<b>Appointment Type</b>	New Patient, Office Visit for ENT CHS Referral

**Blank Appointment**

**Patient Demographic Info**

Name:

DOB:  Age:  SSN:

Address 1:

Address 2:

City:  State:

Zip:  Sex:

Mobile:  preferred

Home Tel:  No text messages ☐

Work:  Email:

Emerg:

Referral Dr.:

Referral Tel:

Insurance:

Policy:

Group:

Patient Note:

Language:

**Account**

**Appointment Information**

☐ Reschedule ☐ Wait

Date/Time:  10/14/2020 9:10a

Appt Type:

Place:

Procedure:

Diagnosis:

Length: 10 minutes

Resource 1: MESLEMANI COMM

Resource 2:

Auth:

Case:

Recall:

Department:

Check In: ☐ Check 2: ☐

Ng Show: ☐ Check 3: ☐

Override: ☐ Check 4: ☐

Check 1: ☐ Walk-In: ☐

Check Out: ☐ Check 6: ☐

Walk-In: ☐ Check 7: ☐

Location:

Reminder 1 ☐ Reminder 2 ☐

Appt Notes:

Once all information has been entered select Save and you will see the appointment listed on the schedule.

**#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS**

**Patient Demographic Info**

Name: SAMPLE, TOM

DOB: 01/01/1950 Age: 70 SSN:

Address 1: 555 FAKE LANE

Address 2:

City: SOUTH OZONE PARK State: NY

Zip: 11420 Sex: F

Mobile:  preferred

Home Tel: (718) 777-7777 No text messages ☐

Work:  Email:

Emerg:

Referral Dr.:

Referral Tel:

Insurance: AE AETNA-COMMERCIAL PLANS

Policy: 1234567888

Group:

Patient Note:

Language:

**Account**

537909/1

**Appointment Information**

☐ Reschedule ☐ Wait

Date/Time: 10/14/2020 9:10a

Appt Type: NP-CHS New Patient, Office Visit for ENT

Place:

Procedure:

Diagnosis:

Length: 10 minutes

Resource 1: MESLEMANI COMM

Resource 2:

Auth:

Case:

Recall:

Department:

Check In: ☐ Check 2: ☐

Ng Show: ☐ Check 3: ☐

Override: ☐ Check 4: ☐

Check 1: ☐ Walk-In: ☐

Check Out: ☐ Check 6: ☐

Walk-In: ☐ Check 7: ☐

Location:

Reminder 1 ☐ Reminder 2 ☐

Appt Notes:

Scheduler EAR NOSE & THROAT ASSOCIATES OF NY 1 Wednesday, October 14 2020

Modules Account Codes Miscellaneous Utilities Print Help Favorites

**Scheduler**

October 2020 COMMACK ALL ENT System View-APT TYP DAILY DETAIL W/ ANOTE Entire Day

Note	Name	AppType	ANote
9:00a	COMM		
9:10a	SAMPLE, TOM	New Patient	
9:20a	COMM		
9:30a	COMM		
9:40a	COMM		
9:50a			
10:00a	COMM		
10:10a	COMM		
10:20a	COMM		
10:30a	COMM		
10:40a	COMM		
10:50a			
11:00a	COMM		
11:10a	COMM		
11:20a	COMM		
11:30a	COMM		
11:40a	COMM		
11:50a			
12:00p	COMM		

☐ BABYLON ALL ENT DAILY  
☐ COMMACK ALL ENT DAILY  
☐ BABYLON ALL ENT WEEKLY  
☐ COMMACK ALL ENT WEEKLY

☐ All ☐ Open  
☐ Filled ☐ Sync

Please note: if you realize you have made a mistake with the appointment **time**, you can manually change the time to reflect your correction by selecting the drop down next to time. Select the appropriate time then select save.

#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

**Patient Demographic Info**

Name: SAMPLE, TOM

DOB: 01/01/1950 Age: 70 SSN: - - -

Address 1: 555 FAKE LANE

Address 2:

City: SOUTH OZONE PARK State: NY

Zip: 11420 Sex: F

Mobile: ( ) - - - preferred

Home Tel: (718) 777-7777 No text messages

Work: ( ) - - - Email:

Emerg: ( ) - - -

Referral Dr.: ?

Referral Tel: ( ) - - -

Insurance: AE AETNA-COMMERCIAL PLANS

Policy: 1234567888

Group:

**Account**

537909/1 New Last Full Demo Ins Info All Appts Save +

**Appointment Information**

Reschedule Wait

Date/Time: 10/14/2020 9:10a

Appt Type: NP-CHS New Patient

Place: ?

Procedure: ?

Diagnosis: ?

Length: 10 minutes

Resource 1: MESLEMANI COMM

Resource 2: ?

Auth: ?

Case: ?

Recall: ?

Department: ?

Check In: ☐ Check 2: ☐

Ng Show: ☐ Check 3: ☐

Override: ☐ Check 4: ☐

Check 1: ☐ Walk-In: ☐

Check Out: ☐ Check 6: ☐

Walk-In: ☐ Check 7: ☐

Location: ?

Reminder 1 ☐ Reminder 2 ☐

Appt Notes:

Patient Note: ?

Language: ?

Comments:



## Scheduling an Established Patient

When you have navigated to the desired date and time for an appointment, double click on the blank slot to open.

Enter patient's DOB into the account field and select enter.

Blank Appointment

Patient Demographic Info

Name:

DOB:  Age:  SSN:

Address 1:

Address 2:

City:  State:

Zip:  Sex:

Mobile:  preferred

Home Tel:  No text messages

Work:  Email:

Emerg:

Referral Dr.:

Referral Tel:

Insurance:

Policy:

Group:

Patient Note:

Language:

Account

01/01/1950

New Last

Full Demo

Ins Info

All Appts

New Appt

Eligibility

More...

Appointment Information

Reschedule Wait

Date/Time: 10/14/2020 9:10a

Appt Type:

Place:

Procedure:

Diagnosis:

Length: 10 minutes

Resource 1: MESLEMANI COMM

Resource 2:

Auth:

Case:

Recall:

Department:

Save Exit

Delete Appt Reset Form

Check In: ☐

Ng Show: ☐

Override: ☐

Check 1: ☐

Check Out: ☐

Walk-In: ☐

Check 2: ☐

Check 3: ☐

Check 4: ☐

Check 5: ☐

Check 6: ☐

Check 7: ☐

Location:

Reminder 1 Reminder 2

Appt Notes:

Search for patient in the list by name and DOB.

**Patient Lookup**

Look For:

Search by: ☒ Acct# ☒ Pat Name ☐ Guar ☐ DOB ☐ Policy# ☐ SS# ☐ Trans# ☐ MR# ☐ Phone# ☐ Claim# ☐ Enc

Patient Name	Account #	SS #	MR #	DOB	Telephone #	Cell #	AR	Balance	Pat Bal
BELSH, MILADA	537311	0000000000		01/01/1950	718/777-7777		CM	0.00	0.00
BOBERT, MICHAEL	536246			01/01/1950	718/777-7777		CM		
ALL, RUSMAN	404834	01/01/1950		01/01/1950	718/777-7777		CM	421.11	0.00
AGUILAR, SANCHEZ	407339	01/01/1950		01/01/1950	718/777-7777		CM		
SMITH, MARY HEATLEY	407312	01/01/1950		01/01/1950	718/777-7777		CM		
FRANKS, QUINN	408811	01/01/1950		01/01/1950	718/777-7777		CM	0.00	0.00
MALDONADO, EDUARDO	407179	01/01/1950		01/01/1950	718/777-7777		CM	1800.00	0.00
VIGIL, BOB	404173	01/01/1950		01/01/1950	718/777-7777		CM		
BERNARDI, ROSE	407334	01/01/1950		01/01/1950	718/777-7777		CM		
CHOWHURY, RAHUL	408439	01/01/1950		01/01/1950	718/777-7777		CM		
RYAN, LINDA	407681	01/01/1950		01/01/1950	718/777-7777		CM		
CHAI, HONGJIAN	407334	01/01/1950		01/01/1950	718/777-7777		CM		
CONLEY, NICOLE	404088	01/01/1950		01/01/1950	718/777-7777		CM		
ALVARADO, JAMAR	407331	01/01/1950		01/01/1950	718/777-7777		CM		
CHAMP, GUY	404111	01/01/1950		01/01/1950	718/777-7777		CM		
BLAS, SAMY	407337	01/01/1950		01/01/1950	718/777-7777		CM		
BELSH, THOMAS	536491	0000000000		01/01/1950	718/777-7777		CM		
WATSON, AUSTIN	532141	01/01/1950		01/01/1950	718/777-7777		CM		
ALUM, ROBERTA	532203	01/01/1950		01/01/1950	718/777-7777		CM		
SAMPLE, TOM	537909			01/01/1950	718/777-7777		AS		a

Total: 60

Once you find the patient double click on their name.



#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

Patient Demographic Info		Account		Appointment Information	
Name:	SAMPLE, TOM	537909/1	New Last	Full Demo New Appt	Ins Info Eligibility
DOB:	01/01/1950 Age: 70 SSN: - - -	<input type="radio"/> Reschedule <input type="radio"/> Wait Date/Time: 10/14/2020 9:10a			
Address 1:	555 FAKE LANE	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Address 2:		Appt Type: <input type="text"/> Place: <input type="text"/> Procedure: <input type="text"/> <input type="text"/> Diagnosis: <input type="text"/> <input type="text"/> Length: 10 minutes Resource 1: MESLEMANI COMM Resource 2: <input type="text"/> Auth: <input type="text"/> <input type="text"/> Case: <input type="text"/> <input type="text"/> Recall: <input type="text"/> <input type="text"/> Department: <input type="text"/>			
City:	SOUTH OZONE PARK State: NY	<input type="checkbox"/> Check In: <input type="checkbox"/> Check 2: <input type="checkbox"/> No Show: <input type="checkbox"/> Check 3: <input type="checkbox"/> Override: <input type="checkbox"/> Check 4: <input type="checkbox"/> Check 1: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check Out: <input type="checkbox"/> Check 6: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check 7: Location: <input type="text"/>			
Zip:	11420 Sex: F	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Mobile:	( ) - - - - - preferred	Appt Notes:			
Home Tel:	(718) 777-7777 <input type="checkbox"/> No text messages	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Work:	( ) - - - - - Email: <input type="text"/>	Appt Notes:			
Emerg:	( ) - - - - -	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Referral Dr.:	<input type="text"/>	Appt Notes:			
Referral Tel:	( ) - - - - -	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Insurance:	AE AETNA-COMMERCIAL PLANS	Appt Notes:			
Policy:	1234567888	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Group:		Appt Notes:			
Patient Note:		<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Language:		Appt Notes:			
Comments:		<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			

You will be led back to the appointment screen where you must verify:

- Address:** If a patient has a change of address note the new address in **patient note**. In **appt notes** notate patient has new address, needs to fill out

#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

Patient Demographic Info		Account		Appointment Information	
Name:	SAMPLE, TOM	537909/1	New Last	Full Demo New Appt	Ins Info Eligibility
DOB:	01/01/1950 Age: 70 SSN: - - -	<input type="radio"/> Reschedule <input type="radio"/> Wait Date/Time: 10/14/2020 9:10a			
Address 1:	555 FAKE LANE	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Address 2:		Appt Type: <input type="text"/> Place: <input type="text"/> Procedure: <input type="text"/> <input type="text"/> Diagnosis: <input type="text"/> <input type="text"/> Length: 10 minutes Resource 1: MESLEMANI COMM Resource 2: <input type="text"/> Auth: <input type="text"/> <input type="text"/> Case: <input type="text"/> <input type="text"/> Recall: <input type="text"/> <input type="text"/> Department: <input type="text"/>			
City:	SOUTH OZONE PARK State: NY	<input type="checkbox"/> Check In: <input type="checkbox"/> Check 2: <input type="checkbox"/> No Show: <input type="checkbox"/> Check 3: <input type="checkbox"/> Override: <input type="checkbox"/> Check 4: <input type="checkbox"/> Check 1: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check Out: <input type="checkbox"/> Check 6: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check 7: Location: <input type="text"/>			
Zip:	11420 Sex: F	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Mobile:	( ) - - - - - preferred	Appt Notes:			
Home Tel:	(718) 777-7777 <input type="checkbox"/> No text messages	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Work:	( ) - - - - - Email: <input type="text"/>	Appt Notes:			
Emerg:	( ) - - - - -	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Referral Dr.:	<input type="text"/>	Appt Notes:			
Referral Tel:	( ) - - - - -	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Insurance:	AE AETNA-COMMERCIAL PLANS	Appt Notes:			
Policy:	1234567888	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Group:		Appt Notes:			
Patient Note:	New Address as of 6/20: 111 IMITAT	<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			
Language:		Appt Notes:			
Comments:		<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/>			

- Telephone Number(s):** If a patient has a change of number you can change it by erasing the old number. If patient lists mobile number as only point of contact, put it into the **home number field**. Advise the patient to let the front desk team know when they come in for their appointment
- Insurance:** If a patient has a new insurance, notate the new insurance and policy number in patient note. In **appt notes** notate patient has new insurance and needs to fill out

#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

<b>Patient Demographic Info</b> Name: SAMPLE, TOM DOB: 01/01/1950 Age: 70 SSN: - - - Address 1: 555 FAKE LANE Address 2: City: SOUTH OZONE PARK State: NY Zip: 11420 Sex: F Mobile: ( ) - - - preferred Home Tel: (718) 777-7777 <input type="checkbox"/> No text messages Work: ( ) - - - Email: Emerg: ( ) - - - Referral Dr.: Referral Tel: ( ) - - - Insurance: AE AETNA-COMMERCIAL PLANS Policy: 1234567888 Group: Patient Note: NEW INS AS OF 6/20 GHI ID #93011 Language:		<b>Account</b> 537909/1 New Last Full Demo Ins Info All Appts New Appt Eligibility Save +	
<b>Appointment Information</b> Reschedule Wait Date/Time: 10/14/2020 9:10a Appt Type: Place: Procedure: Diagnosis: Length: 10 minutes Resource 1: MESLEMANI COMM Resource 2: Auth: Case: Recall: Department:		Save Exit Delete Appt Reset Form Check In: <input type="checkbox"/> Check 2: <input type="checkbox"/> No Show: <input type="checkbox"/> Check 3: <input type="checkbox"/> Override: <input type="checkbox"/> Check 4: <input type="checkbox"/> Check 1: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check Out: <input type="checkbox"/> Check 6: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check 7: <input type="checkbox"/> Location: Appt Notes: NEW INSURANCE NEEDS TO FILL OUT-SH	

Once all fields have been verified and/or adjusted, select **Save** button.

<b>Patient Demographic Info</b> Name: SAMPLE, TOM DOB: 01/01/1950 Age: 70 SSN: - - - Address 1: 555 FAKE LANE Address 2: City: SOUTH OZONE PARK State: NY Zip: 11420 Sex: F Mobile: ( ) - - - preferred Home Tel: (718) 777-7777 <input type="checkbox"/> No text messages Work: ( ) - - - Email: Emerg: ( ) - - - Referral Dr.: Referral Tel: ( ) - - - Insurance: AE AETNA-COMMERCIAL PLANS Policy: 1234567888 Group: Patient Note: Language:		<b>Account</b> 537909/1 New Last Full Demo Ins Info All Appts New Appt Eligibility Save +	
<b>Appointment Information</b> Reschedule Wait Date/Time: 10/14/2020 9:10a Appt Type: NP-CHS New Patient, Office Visit for ENT Place: Procedure: Diagnosis: Length: 10 minutes Resource 1: MESLEMANI COMM Resource 2: Auth: Case: Recall: Department:		Save Exit Delete Appt Reset Form Check In: <input type="checkbox"/> Check 2: <input type="checkbox"/> No Show: <input type="checkbox"/> Check 3: <input type="checkbox"/> Override: <input type="checkbox"/> Check 4: <input type="checkbox"/> Check 1: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check Out: <input type="checkbox"/> Check 6: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check 7: <input type="checkbox"/> Location: Appt Notes:	

Please note if you realize you have made a mistake with the appointment **time**, you can manually change the time to reflect your correction by selecting the drop down next to time. Select the appropriate time then select save.

#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

Patient Demographic Info		Account		Appointment Information		
<b>Name:</b> SAMPLE, TOM <b>DOB:</b> 01/01/1950 <b>Age:</b> 70 <b>SSN:</b> - - - <b>Address 1:</b> 555 FAKE LANE <b>Address 2:</b> <b>City:</b> SOUTH OZONE PARK <b>State:</b> NY <b>Zip:</b> 11420 <b>Sex:</b> F <b>Mobile:</b> ( ) - - - preferred <b>Home Tel:</b> (718) 777-7777 <input type="checkbox"/> No text messages <b>Work:</b> ( ) - - - <b>Email:</b> <b>Emerg:</b> ( ) - - - <b>Referral Dr.:</b> <b>Referral Tel:</b> ( ) - - - <b>Insurance:</b> AE AETNA-COMMERCIAL PLANS <b>Policy:</b> 1234567888 <b>Group:</b>		<b>537909/1</b> <input type="button" value="New"/> <input type="button" value="Last"/> <input type="button" value="Full Demo"/> <input type="button" value="Ins Info"/> <input type="button" value="All Appts"/> <input type="button" value="New Appt"/> <input type="button" value="Eligibility"/> <input type="button" value="Save +"/>		<input type="radio"/> Reschedule <input type="radio"/> Wait <b>Date/Time:</b> 10/14/2020 <b>9:10a</b> <b>Appt Type:</b> NP-CHS <b>New Patient</b> <b>Place:</b> <b>Procedure:</b> <b>Diagnosis:</b> <b>Length:</b> 10 minutes <b>Resource 1:</b> MESLEMANI COMM <b>Resource 2:</b> <b>Auth:</b> <b>Case:</b> <b>Recall:</b> <b>Department:</b>		<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Delete Appt"/> <input type="button" value="Reset Form"/> <input type="checkbox"/> Check In: <input type="checkbox"/> Check 2: <input type="checkbox"/> No Show: <input type="checkbox"/> Check 3: <input type="checkbox"/> Override: <input type="checkbox"/> Check 4: <input type="checkbox"/> Check 1: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check Out: <input type="checkbox"/> Check 6: <input type="checkbox"/> Walk-In: <input type="checkbox"/> Check 7: <b>Location:</b>
<b>Patient Note:</b> <b>Language:</b>		<b>Comments:</b>				

## Full Demographics Function

When making an appointment the full demographics button allows you to see a list of all appointments for a patient.

Once the patient's information has been pulled for in, select the full demo button on right.

#537909/1 New Appointment - Guar: 0.00 Ins: 0.00 AR: AS

**Patient Demographic Info**

Name: SAMPLE, TOM  
 DOB: 01/01/1950 Age: 70 SSN: -- --  
 Address 1: 555 FAKE LANE  
 Address 2:  
 City: SOUTH OZONE PARK State: NY  
 Zip: 11420 Sex: F  
 Mobile: ( ) - - preferred  
 Home Tel: (718) 777-7777 No text messages  
 Work: ( ) - - Email:  
 Emerg: ( ) - -  
 Referral Dr.:  
 Referral Tel: ( ) - -  
 Insurance: AE AETNA-COMMERCIAL PLANS  
 Policy: 1234567888  
 Group:  
 Patient Note:  
 Language: ?

**Account**

537909/1 New Last Full Demo Ins Info All Appts Eligibility Save +

**Appointment Information**

Reschedule Wait  
 Date/Time: 10/14/2020 9:10a  
 Appt Type:  
 Place:  
 Procedure:  
 Diagnosis:  
 Length: 10 minutes  
 Resource 1: MESLEMANI COMM  
 Resource 2:  
 Auth:  
 Case:  
 Recall:  
 Department:  
 Check In: Check 2: Check 3: Check 4: Check 1: Walk-In: Check 6: Check 7: Location:  
 Save Exit Delete Appt Reset Form  
 Appt Notes:

## Select Appointments tab

Demographics 537909/1 EAR NOSE & THROAT ASSOCIATES OF NY 1

Modules Account Codes Miscellaneous Utilities Print Help Favorites

**Demographics**

Lookup: 537909/1 Name: SAMPLE, TOM DOB: 01/01/1950 PBal: 0.00 New Account  
 Age: 70 SS#: AR: AS Pins: AE

**Patient** Notes Special Procedures Miscellaneous Appointments Images

**Patient**

Name: SAMPLE, TOM  
 DOB: 01/01/1950 Age: 70 SS#: -- --  
 Rel: S Self Sex: Female  
 Address1: 555 FAKE LANE  
 Address2:  
 City, State: SOUTH OZONE PARK NY  
 Zip: 11420 No text messages  
 Cell: ( ) - - Lang: ?  
 Home: (718) 777-7777 Race: ?  
 Work: ( ) - - Ethn: ?  
 Email: Emerg: ( ) - -  
 MR#:

**Guarantor**

Name: SAMPLE, TOM  
 DOB: 01/01/1950 Age: 70 SS#: -- --  
 Type: P Personal Sex: Female  
 Address1: 555 FAKE LANE  
 Address2:  
 City, State: SOUTH OZONE PARK NY  
 Zip: 11420 Employer Info  
 Cell: ( ) - -  
 Home: (718) 777-7777  
 Work: ( ) - -  
 Email: Emerg: ( ) - -  
 Misc:

**Other** Msg: A  
 AR Type: AS  
 A B C Special Fields  
 Notes:  
 Provider:  
 Referrer:  
 Diagnosis:  
 Adm/Disch:

**Insurance**

Ord	Set	InsCod	Ins. Name	F	Policy	Hldr	Group	Copay	Plan	Start Date	End Date	BHCO	BHCO
1	✓	AE	AETNA-COMMER	S	1234567888	G	Guarantor						

**Case**

Case #	Description	Start Date	End Date	Closed	AR Class	Insur
1					AS AS	Order More

Save/New Save Cancel

Demographics 537909/1    EAR NOSE & THROAT ASSOCIATES OF NY    1

Modules Account Codes Miscellaneous Utilities Print Help Favorites

**Demographics**

Lookup: 537909/1    Name: SAMPLE, TOM    DOB: 01/01/1950    PBal: 0.00    New Account  
 Age: 70    SS#:    AR: AS    PIns: AE

Patient Notes Special Procedures ☒ Miscellaneous ☒ Appointments Images

Appointment Scheduling    \* Double-click on row to see Appointment History

Go	Status	Date	Time	Proced1	Proced2	AppCd	Min	Resrc 1	Resrc 2	In	NS	Oper	Booked
Jump	Deleted E0	Oct 14, 2020 We	9:10a - 9:20a			NP-CHS	10	MESLEMANI C				E04 E04	06/11/2020 09
Jump	Deleted E0	Oct 14, 2020 We	9:10a - 9:20a			NP-CHS	10	MESLEMANI C				E04 E04	06/11/2020 09
Jump		Aug 17, 2020 Mo	12:10p - 12:20p			NP-CHS	10	LONDON BAB				E01	06/03/2020 15

Save/New    Save    Cancel

- **Yellow:** Changed appointments
- **Gray:** Past appointments
- **White:** Upcoming appointments
- **Resource:** Physician and location of appointment

When making an appointment for an established patient, a full demo appointment search should be conducted to ensure the patient has no upcoming appointment at another location.

### Cancelling an appointment

If a patient wishes to cancel an appointment that is visible from the appointment screen, select jump on the far left next to the date you wish to omit.

Demographics

Lookup: 537909/1    Name: SAMPLE, TOM    DOB: 01/01/1950    PBal: 0.00    New Account  
 Age: 70    SS#:    AR: AS    PIns: AE

Patient Notes Special Procedures ☒ Miscellaneous ☒ Appointments Images

Appointment Scheduling    \* Double-click on row to see Appointment History

Go	Status	Date	Time	Proced1	Proced2	AppCd	Min	Resrc 1	Resrc 2	In	NS	Oper	Booked
Jump	Deleted E04	Oct 14, 2020 Wed	9:10a - 9:20a			NP-CHS	10	MESLEMANI COMM				E04 E04	06/11/2020 09:14 06/11/
Jump	Deleted E04	Oct 14, 2020 Wed	9:10a - 9:20a			NP-CHS	10	MESLEMANI COMM				E04 E04	06/11/2020 09:11 06/11/
Jump		Oct 5, 2020 Mon	2:10p - 2:20p			NP-CHS	10	MESLEMANI COMM				E04	06/16/2020 12:06
Jump		Aug 17, 2020 Mon	12:10p - 12:20p			NP-CHS	10	LONDON BAB				E01	06/03/2020 15:30

The system has now "jumped" to that appointment date. Select "Delete Appt" on the right of the appointment.

#537909/1 Edit Appointment - Guar:\$0.00 Ins:\$0.00 AR:AS (E04) Sid:1648198

**Patient Demographic Info**  
 Name: SAMPLE, TOM  
 DOB: 01/01/1950 Age: 70 SSN:   
 Address 1: 555 FAKE LANE  
 Address 2:   
 City: SOUTH OZONE PARK State: NY  
 Zip: 11420 Sex: F  
 Mobile: preferred  
 Home Tel: (718) 777-7777 No text messages  
 Work: Email:   
 Emerg:   
 Referral Dr:   
 Referral Tel:   
 Insurance: AE AETNA-COMMERCIAL PLANS  
 Policy: 1234567888  
 Group:   
 Patient Note: New address as of 6/20: 1111111111  
 Language:

**Account**  
 537909/1 New Full Demo Ins Info All Appts  
 New Appt Eligibility More...  
**Appointment Information**  
 Reschedule Wait Save Exit  
 Date/Time 10/05/2020 2:10p Delete Appt Restore Data  
 Appt Type: OP-CHS Old Patient, Office Visit for ENT CHS  
 Place:   
 Procedure:   
 Diagnosis:   
 Length: 10 minutes  
 Resource 1: MESLEMANI COMM  
 Resource 2:   
 Auth:   
 Case:   
 Recall:   
 Department:   
 Check In:   
 Check 2:   
 Check 3:   
 Check 4:   
 Check 1:   
 Walk-In:   
 Check 6:   
 Check 7:   
 Location:   
 Reminder 1 Reminder 2  
 Appt Notes:   
 NEEDS TO UPDATE INFO

A prompt will populate and **PTCX** - Patient canceled appointment should be selected

#537909/1 Edit Appointment - Guar:\$0.00 Ins:\$0.00 AR:AS (E04) Sid:1648198

**Patient Demographic Info**  
 Name: SAMPLE, TOM  
 DOB: 01/01/1950 Age: 70 SSN:   
 Address 1: 555 FAKE LANE  
 Address 2:   
 City: SOUTH OZONE PARK State: NY  
 Zip: 11420 Sex: F  
 Mobile: preferred  
 Home Tel: (718) 777-7777 No text messages  
 Work: Email:   
 Emerg:   
 Referral Dr:   
 Referral Tel:   
 Insurance: AE  
 Policy: 1234567888  
 Group:   
 Patient Note: New address as of 6/20: 1111111111  
 Language:

**Account**  
 537909/1 New Full Demo Ins Info All Appts  
 New Appt Eligibility Save +  
**Appointment Information**  
 Reschedule Wait Save Exit  
 Date/Time 10/05/2020 2:10p Delete Appt  
 Appt Type: OP-CHS Old Patient, Office Visit for ENT CHS  
 Place:   
 Procedure:   
 Diagnosis:   
 Length: 10 minutes  
 Resource 1: MESLEMANI COMM  
 Resource 2:   
 Auth:   
 Case:   
 Recall:   
 Department:   
 Check In:   
 Check 2:   
 Check 3:   
 Check 4:   
 Check 1:   
 Walk-In:   
 Check 6:   
 Check 7:   
 Location:   
 Reminder 1 Reminder 2  
 Appt Notes:   
 NEEDS TO UPDATE INFO

Delete Options - Select One  
DRCK - Doctor Cancelled Appointment  
**PTCX - Patient Canceled Appointment**  
Delete Appointment - No Cancel Code  
Quit - no delete

The appointment tab will now reflect the appointment was changed.

Appointment Scheduling * Double-click on row to see Appointment History													
Go	Status	Date	Time	Proced1	Proced2	AppCd	Min	Resc 1	Resc 2	In	NS	Oper	Booked
Jump	Deleted	Oct 14, 2020 Wed	9:10a - 9:20a			NP-CHS	10	MESLEMANI COMM				E04 E04	06/11/2020 09:14:06/11/
Jump	Deleted	Oct 14, 2020 Wed	9:10a - 9:20a			NP-CHS	10	MESLEMANI COMM				E04 E04	06/11/2020 09:11:06/11/
Undo	Cancel - PTDX BYS	Oct 5, 2020 Mon	2:10p - 2:20p			NP-CHS	10	MESLEMANI COMM				E04 BYS	06/16/2020 12:06:07/14/
Jump		Aug 17, 2020 Mon	12:10p - 12:20p			NP-CHS	10	LONDON BAB				E01	06/03/2020 15:30

Please note: The status “Delete Appointment - No cancel Code” should only be used if an appointment was booked by a mistake.





Once completed, select save on bottom right.

Demographics S25781/1 EAR NOSE & THROAT ASSOCIATES OF NY 1

Modules Account Codes Miscellaneous Utilities Print Help Favorites

**Demographics**

Lookup: S25781/1 ? Name: TEST, OPAL DOB: 01/01/1901 PBal: 0.00  
 Age: 113 AC: AS PFin: UHC ☐ New Account

Entered | Notes | Special Procedures | ☒ Miscellaneous | ☒ Appointments | Images

Active	Insur	Referral #	Proc	Diag	Start Date	End Date	Prov	RefPhy	Comments	Allow	Comp	Copay	Date	Date	Dept	LOS	ProcSet	Amount
<input checked="" type="checkbox"/>	UHC	A1234567			12/17/2019	12/27/2019				3	1							

Recall

Reason	Description	Recall Date	Entity
			1 EAR NOSE & THROAT ASSOCIATES OF NY

Account's Balance Due Patient's Balance Due

Guarantor 0.00	Patient 0.00	Charges to Date 0.00	Today's Charges 0.00
Insurance 0.00	Insurance 0.00	Payments to Date 0.00	Today's Payments 0.00
Collection 0.00		Adjustments to Date 0.00	Today's Adjustments 0.00
Total Bal 0.00	Previous Balance 0.00	Last Guarantor Payment Amount	Date
Unapplied 0.00	Last Charge 12/19/2019	Last Insurance Payment Amount	Date
	Last Stmt		

Save/New Save Cancel

The referral information will now populate once we select that patient, alerting us of the referral details.

537909/1 - Reminders

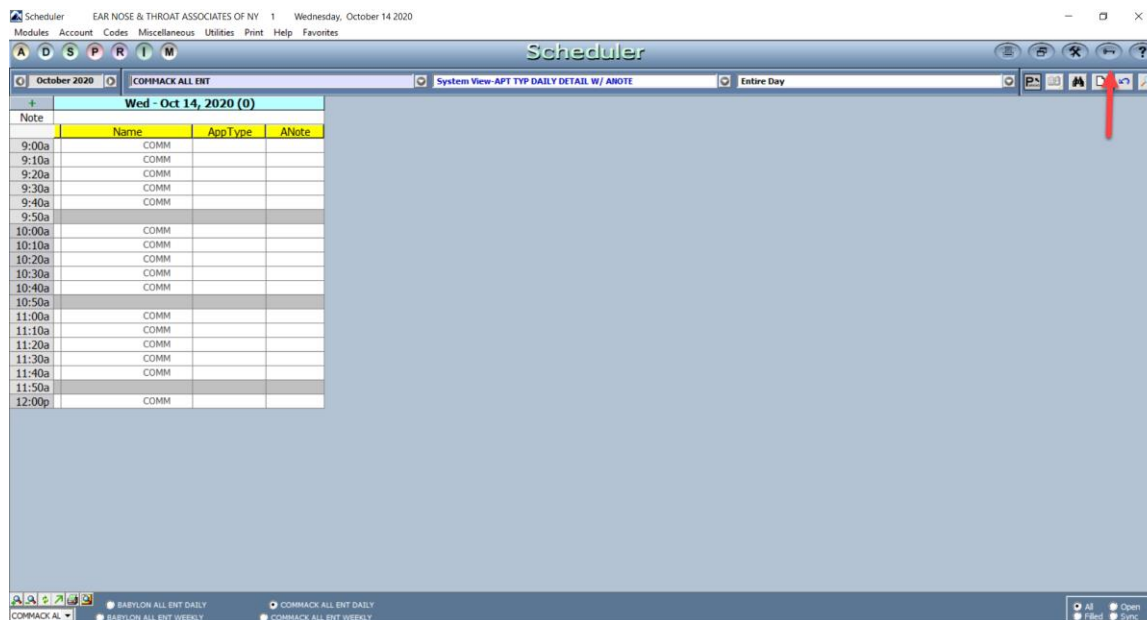
Referrals

Rf#=1111111111111111 Start=06/30/20 End=09/30/20  
 Ins=AE Allw=5

! Rf#=DNU DUMMY PATIENT FOR TRAINING Ins=AE

## Logging Out of Medics

To log off Medics scheduler, select the key on top right of screen



The screenshot shows the Medics Scheduler application window. The title bar reads 'Scheduler' and the menu bar includes 'Modules', 'Account', 'Codes', 'Miscellaneous', 'Utilities', 'Print', 'Help', and 'Favorites'. The main window displays a calendar for 'October 2020' with the date 'Wed - Oct 14, 2020 (0)' selected. A table on the left lists appointments with columns for 'Name', 'AppType', and 'A/Note'. The table contains multiple rows of 'COMM' appointments. In the top right corner of the application window, there is a toolbar with several icons. A red arrow points to the 'Log Out' icon, which is represented by a person with a red 'X' over it.

## SCHEDULER PROTOCOLS

1. All Patients are to be searched by date of birth first.
2. Even if a patient says they are “new”, the office is required to first search the database to check that they are not already in system as they may have been seen at another location:
  - Enter birth date
  - Confirm name
  - Confirm phone number or city of residency with patient if both above are present
3. A new patient appointment should **not** be booked as the last appointment before lunch or as the last appointment of the day.
4. When an Old Patient (Established patient) calls to schedule an appointment, it is necessary to ask if their insurance is the same as that presented in the system. If it has changed the office must notate the new insurance and the policy number in the **Patient Note** section of the appointment. This note will be highlighted on the confirmation screen which will be used for eligibility. **THIS IS MANDATORY OR ELSE THE WRONG ELIGIBILITY COULD BE RUN.**
5. Refer to the insurance code list to select the appropriate code when booking a patient.
6. **No more than two NP's back to back.**
7. The appointment types for scheduling are:
  - ENT Appointments**
    - **New Patient**, Office Visit for ENT CHS Referral: a patient that is new to the practice
    - **Old Patient**, Office Visit for ENT CHS Referral: a patient that has been seen by the practice before within 3 years.
    - **If a patient was last seen longer than 3 years ago book the appointment type as NP, Office Visit for ENT CHS Referral**

	(no selection)
BALLOO	Balloon Procedure
BOTFIL	Botox/Filler
NP-CHS	New Patient, Office Visit for ENT CHS Referral
NP-ENT	New Patient, Office Visit for ENT
OP-CHS	Old Patient, Office Visit for ENT CHS Referral
OP-ENT	Old Patient, Office Visit for ENT
PHONE	Telephone call, Est Pt
POSTOP	Post-Op Office Visit
PRE-OP	Pre-Op Office Visit
PROCED	Procedure
TELEHE	Telehealth, established pt
TESTFU	Test Results Follow-up Apt
TH-FU	Telehealth established patient follow up required

### **Allergy Appointments**

- **New Patient**, Office Visit for ENT CHS Referral: a patient that is new to the practice
- **Old Patient**, Office Visit for ENT CHS Referral: a patient that has been seen by the practice before within 3 years.

	(no selection)
A-OFC	Allergy Oral Challenge
A-PCN	Penicillin testing
NP-ALG	New Patient, Office Visit for Allergy
NPCHSA	New Patient, Office Visit for Allergy CHS Referral
OP-ALG	Old Patient, Office Visit for Allergy
OPCHSA	Old Patient, Office Visit for Allergy CHS Referral

If a patient was last seen longer than **3 years** ago book the appointment type as **NP, Office Visit for ALLERGY CHS Referral**

8. When booking an appointment for a **New Patient**, the following fields are mandatory:

<b>Last Name, First Name</b>	EX: SAMPLE, TOM
<b>Date of Birth</b>	00/00/0000
<b>Complete address</b>	Street, Apartment #, Zip code
<b>Telephone Number</b>	If patient lists mobile number as only point of contact, put it into the home number field
<b>Insurance</b>	Search by insurance code preferred. Searching by insurance name will pull broader search
<b>Insurance ID</b>	ID number for insurance. If there is a secondary list the name and ID in <b>patient note</b>
<b>Appointment Type</b>	New Patient, Office Visit for ENT CHS Referral

Blank Appointment

**Patient Demographic Info**

Name:

DOB:

Address 1:

Address 2:

City:  State:

Zip:  Sex:

Mobile:  ☐ No text message

Home Tel:  ☐ No text message

Work:  Email:

Referral Dr.:

Referral Tel:

Insurance:

Policy:

Group:

Patient Note:

Language:

**Account**

**Appointment Information**

☐ Reschedule ☐ Wait

Date/Time:  08/11/2020 10:10a

Appt Type:

Place:

Procedure:

Diagnosis:

Length: 10 minutes

Resource 1: MESLEMANI COMM

Resource 2:

Auth:

Case:

Recall:

Department:

Check In: ☐ Check 2: ☐

Ng Show: ☐ Check 3: ☐

Override: ☐ Check 4: ☐

Check 1: ☐ Walk-In: ☐

Check Out: ☐ Check 6: ☐

Walk-In: ☐ Check 7: ☐

Location:

Reminder 1: ☐ Reminder 2: ☐

Appt Notes:

9. When scheduling a first-time allergy appointment, please ensure the patient has not taken antihistamines **5 days** prior to the appointment.

CANNOT TAKE (NO PUEDES Tomar)		CAN TAKE (PUEDES Tomar)
Alavert	NASAL SPRAYS	All Asthma Inhalers
Allegra	Astelin	Accolate
Atarax	Astepro	Beclomethasone
Benadryl	Azelastine	Budesonide
Cetirizine	Dymista	Ciclesonide
Chlorpheniramine	Patanase	Flonase
Chlor-Trimeton	Olopatadine	Flunisolide
Clarinet		Fluticasone
Claritin	EYE DROPS	Montelukast
Cyproheptadine	Alcaftadine	Mometasone
Desloratadine	Azelastine	Nasocort
Dimetapp	Bepreve	Nasonex
Diphenhydramine	Bepotastine	Omnaris
Fexofenadine	Elestat	Prednisone
Hydroxyzine	Epinastine	Q-Nas
Levocetirizine	Ketotifen	Rhinocort
Loratadine	Lastacaft	Sensimist
Medizine	Olopatadine	Singulair
Periactin	Optivar	Triamcinolone
Promethazine	Pataday	Xhance
Xyzal	Patanol	Zafirlukast
Zyrtec	Pazeo	Zetonna
	Zaditor	Zileuton
SLEEP AIDS		Zyflo
Diphenhydramine		
Doxylamine		

10. When an established patient calls to schedule an appointment, it is necessary to ask if their insurance is the same as that presented in the system. If it has changed the office must notate the new insurance and the policy number in the **Patient Note section** of the appointment card. This note will be highlighted on the confirmation screen which will be used for eligibility. **THIS IS MANDATORY OR ELSE THE WRONG ELIGIBILITY COULD BE RUN.**
11. When scheduling an appointment for an established patient, use the full demo module to check for any possible upcoming appointments. Patients tend to forget they have an upcoming appointment or make an appointment in one of our other locations without knowing we are the same practice.
12. An appointment note is only specific to that appointment. Use that field to notate initials of who made the appointment and anything you would need to relay to the office team.
13. For emergency purposes only, if a same day appointment must be scheduled please reach out to the office contact listed for the office location.

### Medics Insurance Codes

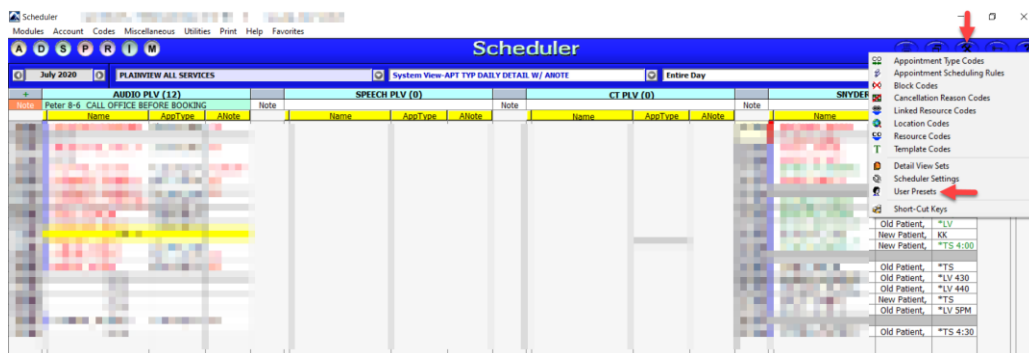
INSURANCE NAME	INSURANCE CODE	INSURANCE NAME	INSURANCE CODE
AARP	AARP (Only as secondary)	Magnacare	MAGN
Aetna	AE	Medicaid	MDCD
Aetna Medicare	AEM	Medicare-Brooklyn	MC
Affinity	AFF	Medicare-Bronx	MC
Affinity Medicaid	AFFM	Medicare-LI	MC
		Medicare-Queens	GH
BlueCross Blue Shield	BLSH	Medicare- Railroad	RRMC
BlueCross Blue Shield Medicare	BLSM	Meritain	MER
		Multiplan (PHCS Network)	MULP
Christian Brothers	CBE		
ChampVA	CHV		
Cigna	CIGN	Oxford	OXE
Elderplan	ELDP	UMR	UMR
Empire	EME	United Healthcare	UHC
		United Healthcare Medicare	UHCM
Fidelis	FIDE		
Fidelis Medicare	FIDC	VNS	VNS
		Wellcare	WCE
GEHE	GEHA	Wellcare Medicare	WCM
GHI	GHIE	Workers Compensation	WC
GHI HMO	GHIH		
GHI Medicare	GHIC	1199	1199
Great West (Cigna)	GW		
Healthfirst	HLFE	Danny Meslemani does not par with	Agewell
Healthfirst Medicare	HLFM		
Healthplus(Empire JLJ prefix)	HPT	Greenfield, London, Snyder does not par with	Liberty Health Advantage
Healthplus Medicare	AGC		
HIP	HIPE	Ashlei Mathew does not par with	Aetna HMO, PPO, Amerihealth, CareConnect, Humana, GHI, Healthfirst, HIP, Metroplus, 1199, Wellcare,
HIP Medicare	HIPM	Mary Paul does not par with	Amerihealth, CareConnect, Humana, Metroplus, POMCO,
Healthcare Partners	HLP		
Humana	HUMA		

## How to Make a Preset Button in Medics Scheduling for Specific Offices & Specialties

A preset button is a button located on the bottom of the Medics homepage that ties to specific providers and a location. They are “favorite buttons” for those physicians or locations that the user books in frequently.

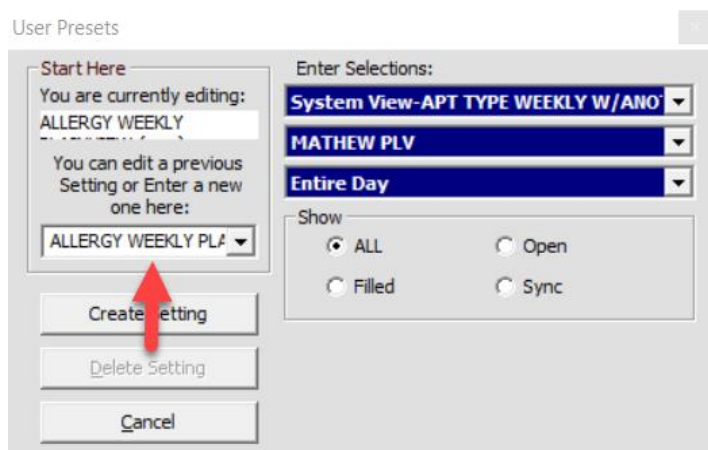
All preset buttons in Medics are user specific. They must be built user by user.  
 To build preset buttons, follow the steps below:

1. From the scheduler homepage, select the tools tab and chose – User Presets



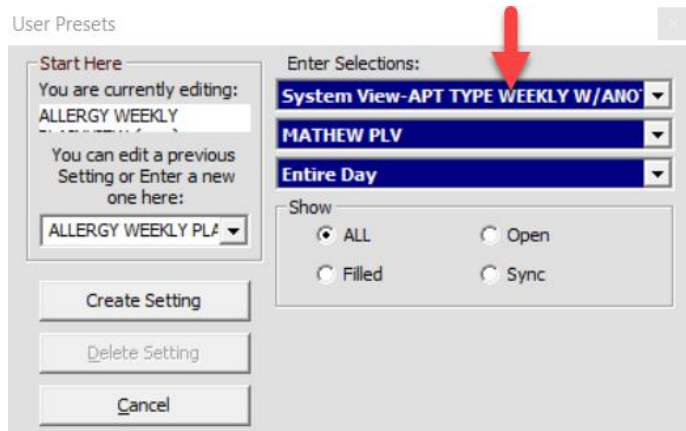
The user preset page will populate.

2. Start to type the name of the preset on the second box. The name should be the name of the physician and location or the specialty and location.



3. Choose the selection menu for the view, location, and physician. The choices for first line will be your view. The available options to choose for should be:
  - System View-APT TYPE DAILY W/ ANOTE
    - Select this view for a daily view
  - System View-APT TYPE WEEKLYW/ ANOTE
    - Select this view for a weekly view





User Presets

**Start Here**  
 You are currently editing:  
 ALLERGY WEEKLY  
 You can edit a previous Setting or Enter a new one here:  
 ALLERGY WEEKLY PLA

Create Setting  
 Delete Setting  
 Cancel

**Enter Selections:**

System View-APT TYPE WEEKLY W/ANO  
 MATHEW PLV  
 Entire Day

Show  
☒ ALL ☐ Open  
☐ Filled ☐ Sync

4. The second line will allow you to choose your resource. The first selection of resources are linked resources: multiple physicians/services at one location or one physician at multiple locations. The second set of selections are single resources: one physician/service at one location.

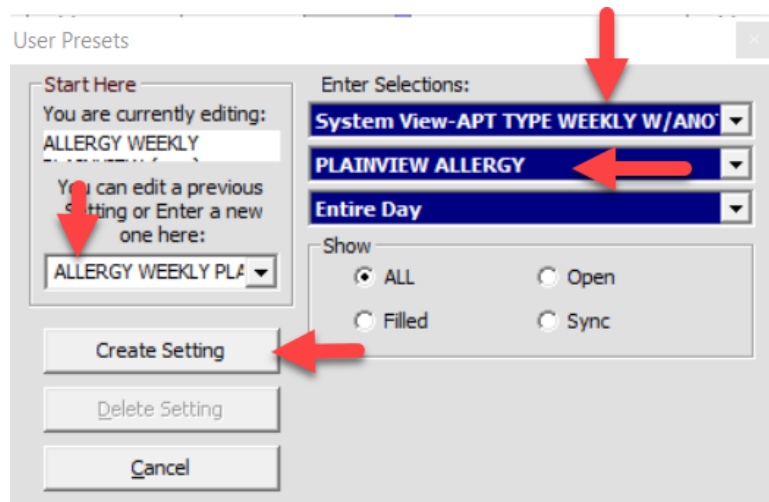
In the example below, we want to see the allergists' in the Plainview location, Ashlei Mathew and Mary Paul, schedule for the week as they are there on different days in this location

For the first line we will select **System View-APT TYPE WEEKLYW/ ANOTE**

For the second line we will select **PLAINVIEW ALLERGY** for the resource

**Please note** the third line is set to Entire Day as default.

Once completed select Create Setting



User Presets

**Start Here**  
 You are currently editing:  
 ALLERGY WEEKLY  
 You can edit a previous Setting or Enter a new one here:  
 ALLERGY WEEKLY PLA

Create Setting  
 Delete Setting  
 Cancel

**Enter Selections:**

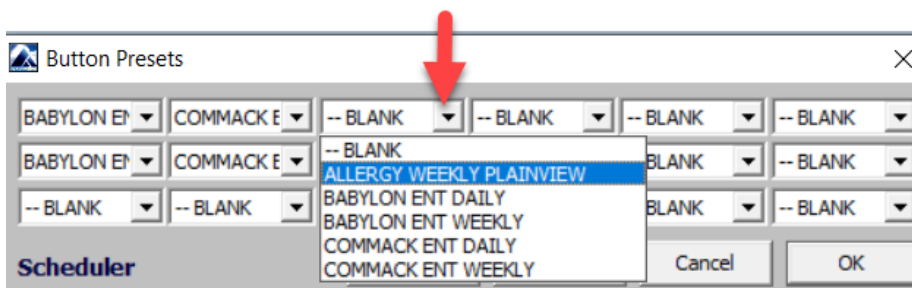
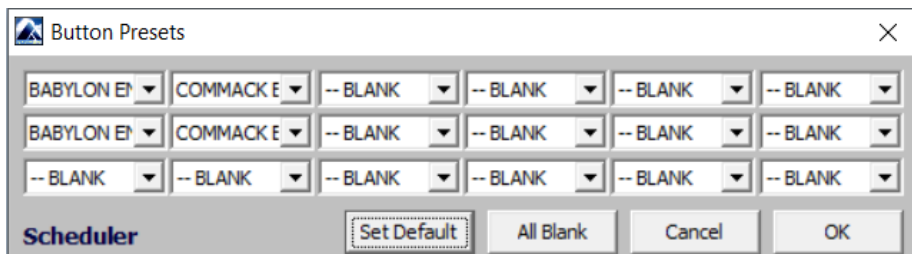
System View-APT TYPE WEEKLY W/ANO  
 PLAINVIEW ALLERGY  
 Entire Day

Show  
☒ ALL ☐ Open  
☐ Filled ☐ Sync

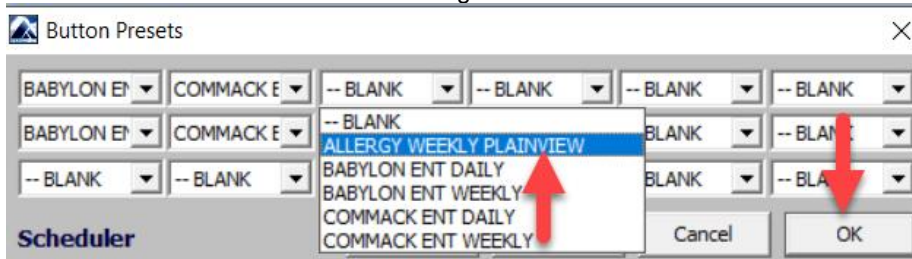
5. You will be prompted to the main screen. Double click with your right button on any empty space on the bottom pane and button presets will appear.



From this screen you can organize the presets how you see fit. Single left click on the arrow to select the preset you have created.



6. Once finished select OK at bottom right



7. The preset selection and place will now appear on the bottom of your scheduler home page

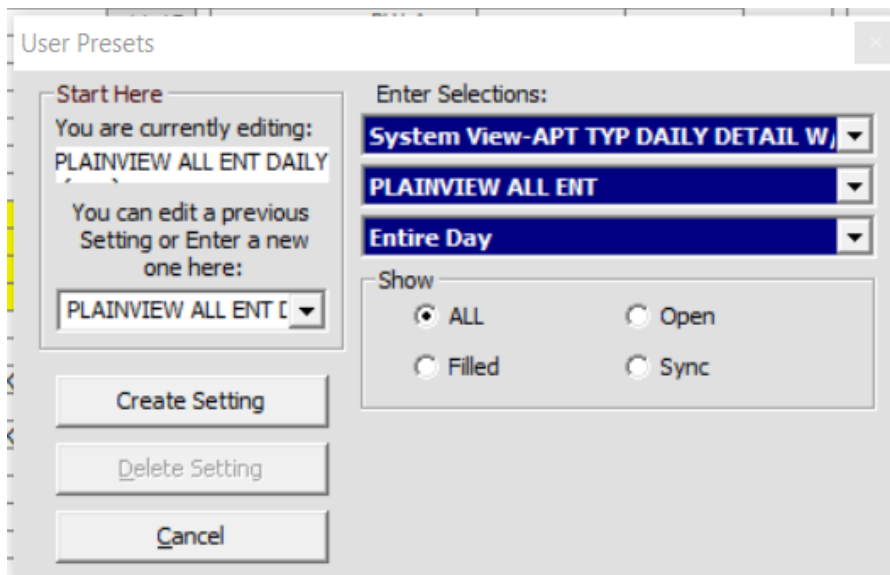




See below as an illustration for linking multiple physicians at one location in a preset.

Follow steps 1-6 using the following as names and resources:

- Preset name: Plainview All ENT Daily
- View: System View-APT TYPE WEEKLY W/ ANOTE
- Resource selection: Plainview All ENT



### Physicians Location, Hours & Office Contact Information

<b>Office Location</b>	400 West Main Street Babylon, NY 11702	
<b>Telephone Number</b>	(631) 893-6070	
<b>Fax Number</b>	(631) 893-6465	
<b>Office Contact</b>	Mary Rossano	
<b>Office ENT Physician</b>	Alexander London, MD	Monday 8:00 – 4:00 Tuesday 1:00 – 5:00 Wednesday 8:30 – 4:00 Thursday 8:30 – 4:00 Friday 8:30 – 12:00

<b>Office Location</b>	2171 Jericho Turnpike Commack, NY 11725	
<b>Telephone Number</b>	(631) 493-0033	
<b>Fax Number</b>	(631) 493-3284	
<b>Office Contact</b>	Latifa Robinson	
<b>Office ENT Physician</b>	Danny Meslemani, MD	Monday 2:00 – 6:00 Tuesday 10:00 – 3:00 Wednesday 9:00 – 2:00 Thursday 12:00 – 5:00 Friday 9:00 – 12:30

<b>Office Location</b>	146A Manetto Hill Road Plainview, NY 11803	
<b>Telephone Number</b>	(516) 931-5353	
<b>Fax Number</b>	(516) 931-4235	
<b>Office Contact</b>	Karen Kelly	
<b>Office ENT Physicians</b>	Barak Greenfield, MD	Monday 9:30 – 6:00 Wednesday 9:30 – 6:30 Thursday 2- 6:30
	Alexander London, MD	Tuesday 8:30 - 11
	Gary Snyder, MD	Tuesday 2:30 - 5:30 Thursday 9:30 - 11:30
<b>Office Allergist</b>	Mary Paul, MD	Monday 9:00 - 5:30
	Ashlei Mathew, MD	Tuesday 9:00 - 6:00 Wednesday 9:00 – 5:45