

MediEase 3.3 & SynCo Scheduler - Changing Patient ID's

To change a patient SSN when using both the SynCo Scheduler and MediEase, first change the SSN in the Scheduler, then add a dummy record with the old SSN in MediEase and finally use the **Combine SSNs** feature in MediEase to move the immunization data over to the new SSN.

Change the ID in SynCo Scheduler

1. From the Main menu in the Scheduler choose **Tools** and then **Clients**.
2. Select the **Patient ID (SSN in MediEase)** that you want to change.
3. Click the **Change ID** button.
4. In the **To** box type in the New ID. Click **OK**. This will update all patient appointments, demographic information and address to the new Patient ID in both the Scheduler and MediEase Programs. (Note: All immunization records are still in MediEase under the prior ID/SSN.)
5. Close the Scheduler.

Change the SSN in MediEase

6. Open MediEase. Click the **Add** button. Enter the original SSN into **Soc Sec #**. Fill in Last, First and DOB. Click the **Save** button.
7. You will now have 2 records for the Patient - one with the new SSN, which includes demographic and address information; the other with the original SSN, which includes immunization records.
8. Click the **Search** button. Type in the new SSN. The patient's record should appear.
9. From the Main Menu choose **Patient, SSN Utilities**, and **Combine SSNs**. This opens the Combine Social Security #'s dialog box.
10. The Combine: box shows the current SSN (the one that was changed in the Scheduler). In the **With:** box type in the previous SSN (this is the SSN that was just added to MediEase). If you would like to keep the old SSN as previous SSN leave the check in the box for Keep As Previous SSN.
11. Click the **OK** button. This combines both patient records into one. If you kept the old SSN as the previous SSN you may search for the patient in MediEase using either SSN.

Because MediEase and the Scheduler share the same demographic database, when the ID is changed in the Scheduler, the SSN is simultaneously changed in MediEase. All immunization records in MediEase are still linked to the prior SSN. The above steps allow MediEase to re-associate all immunization events first to the prior SSN and then combine them with the new ID/SSN.