

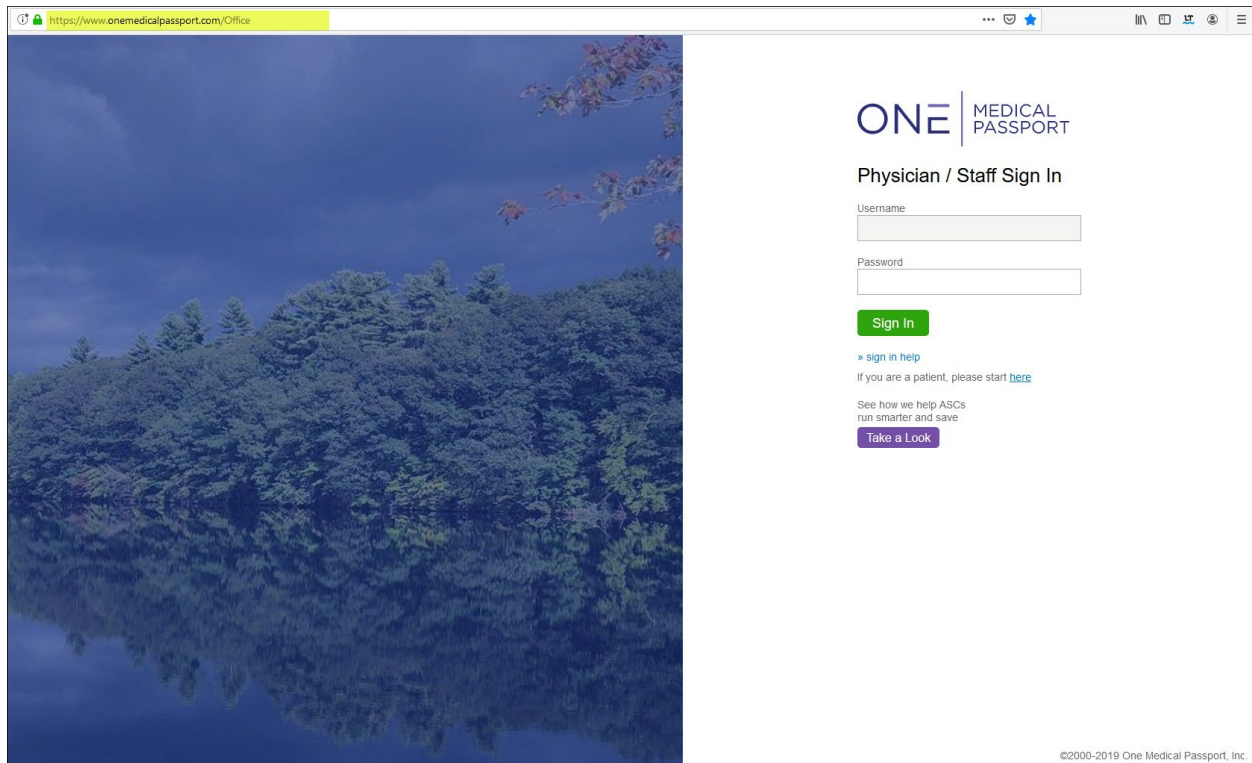
# Passport Booking™ Office User Guide

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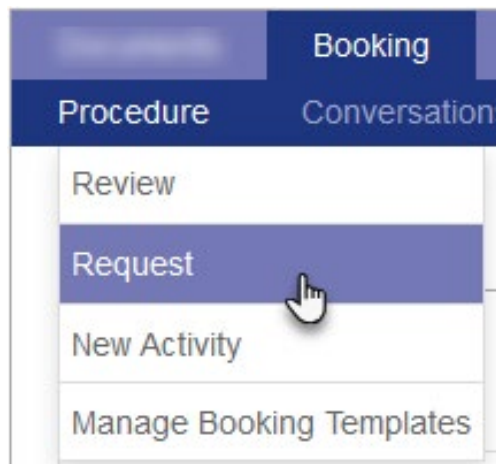
## Logging in

Navigate to [www.onemedicalpassport.com/office](https://www.onemedicalpassport.com/office) and sign in with your existing username and password.



## Requesting a Booking

To request a booking, hover over 'Procedure' in the top navigation bar and select 'Request':



This will bring you to a search function, where you can search for the patient:

If the patient does not currently exist, you will be asked to 'Add a new patient'.

Then you will select the physician, and if applicable, the Booking Form, and finally a Booking Template:

The Booking Form allows the facility to streamline Bookings for different procedure types.

Documents | **Booking** | Other

Procedure | Conversations | Start Conversation

### Request Procedure

Select the following to determine the correct booking configuration

Physician

Surgery Booking Form

Booking Template (optional)

The Booking Template allows the Office to save Procedure details within the booking fields so that the office scheduler does not have to re-enter the same details for the same case-types. This is all created and managed by the Office. See below for how to manage templates.

This will bring you to the Booking fields that your facility has asked for you to fill out. Depending on their configuration will depend on how many pages and questions there will be in the Booking Request.

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Documents | **Booking** | Other

Procedure | Conversations | Start Conversation | Booking Notifications

### Booking

**Patient Information**

First Name

Middle Initial (optional)

Last Name

Date of Birth (mm/dd/yyyy)

Sex  
 Male  
 Female

Standard information that the Bookings will always include:

- Patient Information
- Procedure Information
- Date/Time Preference

At the end of the Booking Request you will have the option to Edit any section if needed, as well as saving the Booking as a template. Saving the booking as a template allows the Office Scheduler to re-use the booking details for other patients, which can be found at the start of the request process. One will need to name the template so it can be found again.

Save booking as a template

Template booking name

**Ganglion Cyst Removal**

**Scheduling Preference**    Date Preference: **08/05/2019**  
 Time Preference: **0800**  
 Comments:

**Procedure Information**    Physician: **Physician , Test**  
 Surgical Site: **Right**  
 Exact Surgical Procedure: **Ganglion Cyst Removal**  
 Patient Diagnosis: **Ganglion Cyst**  
 Time Estimate: **0 hr(s) 45 min(s)**  
 Comments:  
 Minor Room? **No**  
 Surgeon: **Dr. Test Physician**  
 Anesthesia Method: **Local**

**Insurance Information**    Select how to collect insurance information for scheduling this case: **Insurance Unavailable or Not Required**

[Edit Section](#)

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Save booking as a template

Finish
Finish & Upload Documents
Exit
 Print after finish

Final steps:

- If you select 'Finish' this will complete the booking, immediately transmit it to the facility, and bring you back to the Review screen. You can also select the 'Print after finish' checkbox, which will allow you to print the booking request once finished.

- If the facility is using Documents, you will see the option to select ‘Finish and Upload Documents’ this will bring you directly to the Document Group where you can upload documents for the facility.
- If you select ‘Exit’ this will save the Booking, but it will be saved under the status of **Incomplete**. Incomplete bookings do not send to the Facility. You will have the ability to find and complete Incomplete bookings through the review screen if you need to finish it later.

## Actions

Once the booking is created, you can perform actions to the case:

▼ Actions

- Edit booking
- New booking
- Reschedule
- Cancel
- On hold
- Change log
- View booking
- Print booking
- Print with change log

1. **Edit Booking:** this allows you to change any patient or procedure detail that was included in the booking that needs to be updated (i.e., updated procedure code, patient address, etc.). This will change the status of the booking to Edited. Note this is not the button to select when trying to change the case’s date/time.
2. **New booking:** this takes you to a brand-new booking request for the same patient.
3. **Reschedule:** this allows you to change the date/time preference for the case.
4. **Cancel:** this give you a pop-up to confirm that you would like to cancel the case as well as provide a comment:

Cancel

Patient: Robert Test  
 Physician: Doctor, Ivan  
 Procedure: Colonoscopy  
 Created: 07/03/2019 1240

Comments (optional)

Cancel due to denied insurance authorization.

Save
Cancel

a.

b. The facility then can Confirm the Cancellation, which changes the status:

07/03/2019 1241	Test, Robert	Doctor, Ivan	Colonoscopy	Office,	1	Confirm Cancelled (OMP), April 07/30/2019 <a href="#">View Comments</a>	Reopen 2
-----------------	--------------	--------------	-------------	---------	---	--	----------

c. If needed, you will have the ability to Reopen the cancelled case which re-opens the action items including Reschedule.

5. **On Hold:** this option allows you to choose if this case needs to be put on hold for whatever reason.
6. **Change log:** this gives you a summary of every change made to a case that was booked in One Medical Passport®

Change Log			
Patient: Jane Test			
Physician: Doctor, Ivan			
Procedure: Cataract			
Created: 07/02/2019 0851			
Date/Time Preference: 07/04/2019 / Block scheduling			
Changed <input checked="" type="checkbox"/>	Action <input type="checkbox"/>	Details	Changed By <input type="checkbox"/>
07/02/2019 0854	Booking Received	Status changed to Booking Received	Cobbs (OMP), April
07/02/2019 0853	View	Viewed	Cobbs (OMP), April
07/02/2019 0853	Print	Printed	Cobbs (OMP), April
07/02/2019 0852	Finish	Finished	Office, April
			<input type="button" value="Close"/>

7. **Print Booking:** this allows you to print the booking sheet.
8. **Print with change log:** this allows you to print the booking sheet with the Change Log.

## The Booking Tab

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Home | Help | Sign Out

Documents | **Booking** | Other

Procedure | Conversations | Start Conversation | Booking Notifications

### Review Bookings

Passport Booking

Search by procedure date

Search by booked date

**July 2019**

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Booked Date/Time  Patient  Physician  Procedure  Created By  Status  Actions

Booked Date/Time	Patient	Physician	Procedure	Created By	Status	Actions
<input type="checkbox"/> 07/16/2019 1345	Test, Jane	Physician , Test	Test	Office, April	Confirmed 07/29/2019 1000	▶ Actions
					Office, April 07/29/2019	▶ View Comments ▶ Documents
<input type="checkbox"/> 07/16/2019 1256	Test, Jane	Physician , Test	Colonoscopy	Office, April	Unviewed	▶ Actions
					Office, April 07/16/2019	▶ Documents

First name (optional)

Last name (optional)

Date of Birth (optional)

Physician (optional)  
Select Physician   
Selected: All physicians

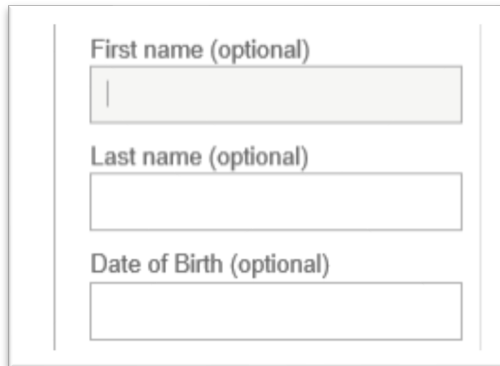
Status (optional)  
Select Status   
Selected: All status

1. The calendar on the left-hand navigation allows for ease of navigation from one day to another. If you want to review Bookings for a different day, simply click on the date that you would like to review.
2. The option 'Search by Procedure Date' or 'Search by Booked Date' allows for you to choose if you would like to view the patients by date booked or by the procedure date. The screenshot above displays patients by booked date.
3. Use the green arrows to toggle back and forth to different dates.
4. Click the grey arrow to sort each column by patient name, physician, procedure, who created the booking, or the booking status.



Use the following, left hand navigation to narrow your search filters and find your patients in other ways:

- To search a specific patient, enter the name or date of birth here and hit search at the bottom of the screen:

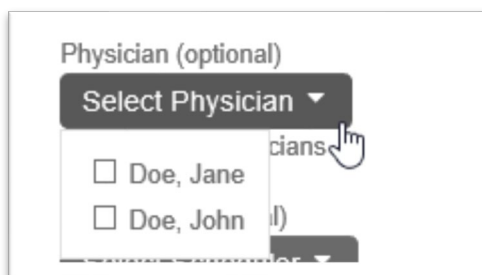


First name (optional)

Last name (optional)

Date of Birth (optional)

- To filter your search results to only a certain physician or physician's cases, pick the physician out of the drop-down:




Physician (optional)

Select Physician ▼

Doe, Jane

Doe, John

- Select schedulers from this drop down in order to filter your results by only the cases that you or a certain group of schedulers created:



Scheduler (optional)

Select Scheduler ▼

Name, Scheduler

Office (OMP), Henri

vivenzio, carlo

- To filter by a certain status, select the status from the drop-down:

The image shows a screenshot of a web application's filter interface. At the top, it says 'Status (optional)'. Below that is a dark button labeled 'Select Status' with a downward arrow. A dropdown menu is open, displaying a list of status options, each with an unchecked checkbox to its left. The options are: 'Booking Received', 'Cancelled', 'Confirm Cancelled', 'Confirmed', 'Date/Time is Unavailable', 'Edited', and 'Incomplete'. A vertical scrollbar is visible on the right side of the dropdown list.

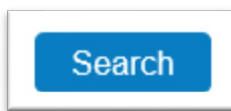
## Status Definitions

- **Booking Received:** this status is an indication that the facility has received the booking
- **Cancelled:** this status shows when the Office has requested to cancel the case
- **Confirm Cancelled:** this status shows when the Facility confirms that the case is cancelled
- **Confirmed:** this status shows when the case is confirmed by the Facility and the case is on the schedule
- **Date/Time is Unavailable:** this status displays when the originally requested date and time is not available and a new date/time needs to be determined
- **Edited:** this status displays when the case has been edited. To determine the most recent edit please reference the Change Log
- **Incomplete:** this status shows incomplete bookings that allows for a scheduler to go back in and complete the booking
- **New date proposed:** when the original date/time is unavailable, and a counter-offer has been suggested
- **On Hold:** this status is an option that the facility can choose when the booking needs to be placed on hold
- **Reopen:** when a cancelled case has been reopened and needs to be scheduled
- **Rescheduled:** when a case has been moved from the original date to another date
- **Unviewed:** this status states when a facility has not viewed the case
- **Viewed:** this status is for cases that have been viewed but are not yet confirmed

- To filter by a date range, you can enter in the specific date range:

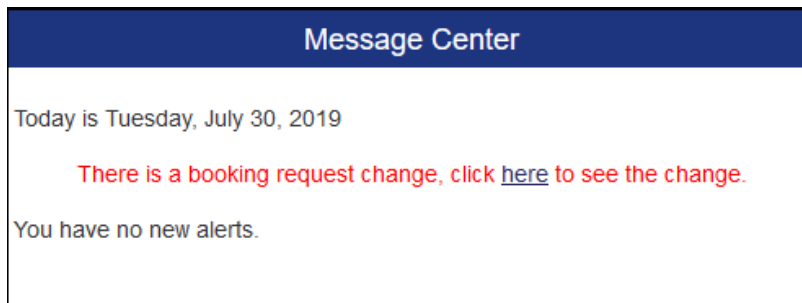
The image shows a rectangular form with two input fields. The top field is labeled 'From' and the bottom field is labeled 'To'. Each field has a small calendar icon to its right, indicating a date picker.

- To complete your search function, select the blue 'Search' button at the bottom of the left-hand navigation bar:

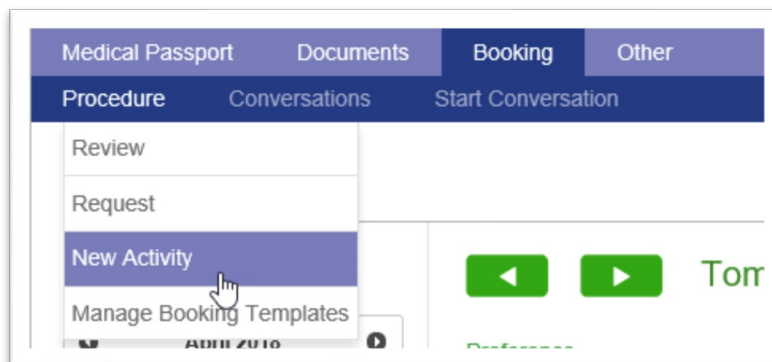


## New Activity Queue

You will be notified of updates to Bookings in the Message Center on the home screen:



You can also access this queue through the Booking tab:



In this queue you will see all of the new cases with important details:

1. You will find the Status of the case. This status will be important to understand if the case has been confirmed or is pending still.
2. Comments will pop-up when you select 'View Comments'.
3. You have the option to clear this queue as you see fit. Once you are satisfied with the cases confirmed details, you can clear the case by selecting the check-mark.

## Manage Booking Templates

You will have the ability to manage the Booking Templates that you create:

As well as Clone or delete any existing templates:



To complete the cloning process, you will need to give the template a name as well as assign it to a physician:

**Create Clone**

Template to be cloned: Ganglion Cyst Removal

Name

Physician

---

## Multi-Print

Multi-Print allow users to print multiple booking sheets at one. All one needs to do is select the number of radio buttons on the left-hand side of the patients Booking that you would like to print and select “Print Bookings” at the top in the New Activity Queue:

**New Activity**

Below is a listing of new activity for bookings. Click \* change information about the booking. Click New Bc booking information. Click 'Change log' to view a list

---

[Print bookings](#)

Print Change Log

---

Booked  
Date/Time 
Patient

---

<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/03/2018 0810	test, BlackWidow
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/03/2018 0806	test, Aquaman

In the Booking tab, if more than one case is selected, you will also get the option to “Print bookings”:

Medical Passport Documents **Booking** Other

Procedure Conversations Start Conversation Booking History

### Review Bookings

Search by Procedure Date  
 Search by Booked Date

**August 2018**

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

First name (optional)

Today (August 03, 2018)

[Print bookings](#)  
 Print Change Log

Booked Date/Time  Patient  Physician

<input checked="" type="checkbox"/>	08/03/2018 0811	test, Flash	Doe, Jane
<input checked="" type="checkbox"/>	08/03/2018 0810	test, BlackWidow	Doe, John

The user has the ability to either have the Change Log print with each case, or not but selecting/unselecting the “Print Change Log” button.

Once “Print bookings” is selected, the user will have a popup that will prompt them to print.