

## Passport Booking™ Office User's Quick Guide

Go to [www.onemedicalpassport.com/office](http://www.onemedicalpassport.com/office) to log in with your Username and Password. View of Home screen:

The screenshot shows the home screen of the One Medical Passport Office User interface. The top navigation bar includes 'Medical Passport', 'Documents', 'Booking' (highlighted in green), and 'Other'. A left sidebar contains 'Home', 'Help', and 'Sign Out'. The main content area is titled 'Administration' and 'Welcome, Office Scheduler'. A 'Message Center' box displays a message: 'Today is Sunday, August 12, 2018. There is a booking request change, click [View](#) to see the change. There are new conversation updates. Click [View](#) to see the updates. You have no new alerts.' Callouts provide instructions: 'Click the Booking tab to get started' points to the Booking tab; 'Shortcut to view New Activity from the Facility' points to a link in the welcome message; 'This appears when new messages come from the Facility' points to the message box; and 'Special alerts from One Medical Passport will appear here' points to the message content.

Hover over the Procedure sub-category. New Activity List View:

The screenshot shows the 'New Activity List View' in the One Medical Passport Office User interface. The top navigation bar includes 'Medical Passport', 'Documents', 'Booking', and 'Other'. A sub-navigation bar includes 'Procedure' (highlighted in green), 'Conversations', 'Start Conversation', 'Booking History', and 'Booking Notifications'. A callout 'Navigate back to home screen' points to the 'Home' link in the top right. A dropdown menu is open under 'Procedure', showing options: 'Review', 'Request', 'New Activity' (highlighted in green), and 'Manage Booking Templates'. A callout 'Hover over the Procedure menu to' lists: 1. Review all booking statuses, 2. Request a new booking, 3. See only New Activity from the Facility, 4. Clone, delete or view Booking Templates. Below the menu is a 'Location' dropdown set to 'Select'. A callout 'Print multiple bookings with or without the change log' points to the 'Print bookings' section, which includes a checked checkbox for 'Print Change Log'. A callout 'Sort the list by clicking the gray arrow on any column' points to the gray arrow icons on the column headers: 'Booked Date/Time', 'Patient', 'Physician', 'Procedure', 'Created By', 'Status', and 'Actions'. The table below has two rows of booking data. A callout 'Click the check mark to remove from the New Activity list, or click the box to print multiple bookings' points to the checkbox in the first row.

|                                     | Booked Date/Time | Patient        | Physician  | Procedure     | Created By        | Status  | Actions   |
|-------------------------------------|------------------|----------------|------------|---------------|-------------------|---|-----------|
| <input checked="" type="checkbox"/> | 08/08/2018 1428  | Watson, Reagan | Sole, Mark | Tonsillectomy | Watson, Jen       | Booking Received<br>Staff, Facility<br>08/09/2018         | ► Actions |
| <input type="checkbox"/>            | 08/05/2018 1311  | Lewis, Jamie   | Sole, Mark | EGD           | Scheduler, Office | Confirmed<br>08/15/2018 1000<br>Watson, Jen<br>08/08/2018 | ► Actions |

Action List View:

The screenshot shows the 'Review Bookings' page in the ONE Medical Passport system. At the top, there are navigation tabs for 'Documents', 'Booking', and 'Other'. Below these are sub-tabs for 'Procedure', 'Conversations', 'Start Conversation', and 'Booking Notifications'. The main header includes the ONE Medical Passport logo and the tagline 'Innovative Solutions for a Changing Healthcare World', along with 'Home | Help | Sign Out' links.

The main content area is titled 'Review Bookings' and features a search bar with options to search by 'procedure date' or 'booked date'. A calendar for July 2019 is visible on the left, with the 16th highlighted. A callout box points to the calendar with the text 'Click calendar or arrows to change dates'. The main table displays a list of bookings for 'July 16, 2019 - Tuesday'. The table columns include 'Booked Date/Time', 'Patient', 'Physician', 'Procedure', 'Created By', 'Status', and 'Actions'. Two booking entries are shown: one for 'Test' (confirmed) and one for 'Colonoscopy' (unviewed). A callout box points to the 'Actions' column with the text 'Click here to add pop-up alerts for New Activity'. Another callout box points to the 'Actions' dropdown for the 'Colonoscopy' booking with the text 'Click here to view action links'. A third callout box points to the search filters with the text 'Change search filters here'. A fourth callout box points to the 'Print with change log' link with the text 'Print with change log'.

Status Definitions

- **Booking Received:** Shows that the facility has received the booking but not confirmed it
- **Cancelled:** Shows when the Office has requested to cancel the case
- **Confirm Cancelled:** Shows when the Facility confirms that the case is cancelled
- **Confirmed:** The case is confirmed by the Facility and is on the schedule
- **Date/Time is Unavailable:** 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:** 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 by the Facility
- **On Hold:** This status is an option that the facility can choose when the booking needs to be placed on hold for missing information or documents
- **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:** The facility has not viewed the case yet
- **Viewed:** this status is for cases that have been viewed but are not yet confirmed

## The Booking Tab

**ONE** | MEDICAL PASSPORT  
Innovative Solutions for a Changing Healthcare World

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

July 16, 2019 - Tuesday

| 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<br>07/29/2019 1000 | ▶ Actions                                    |
|  |            |                  |             |               | Office, April<br>07/29/2019  | <a href="#">View Comments</a><br>▶ Documents |
| <input type="checkbox"/> 07/16/2019 1256 | Test, Jane | Physician , Test | Colonoscopy | Office, April | Unviewed                     | ▶ Actions                                    |
|  |            |                  |             |               | Office, April<br>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, preference date and time, physician, procedure, or booking status.
5. Narrow your search by using filters for patient name, physician name, date range, or status. Clicking the Search button will save your search preference.

**For detailed instructions on all these features, please see the full Office Users Guide.**