

11.19.2021 One Medical Passport Updates

Medical Passport Updates	2
1. Medical Passport and Checklist tabs merged	2
A. Overview	2
Searching for Patients	5
Creating an Updated Medical Passport	7
Adding a New Registration	9
Incomplete Medical Passports.....	11
Printing Medical Passports	12
Printing Medical Passport Search Results (List)	13
B. Sharing Medical Passports	14
Comprehensive Sharing	14
Expanded Sharing.....	16
C. Sub Facilities	17
2. Remove Zip Code from Preferred Pharmacy	18
Booking Update	19
1. Conversations Now Support Attachments	19
2. General History Review	23
PaySuite	25
1. PaySuite Integration	25

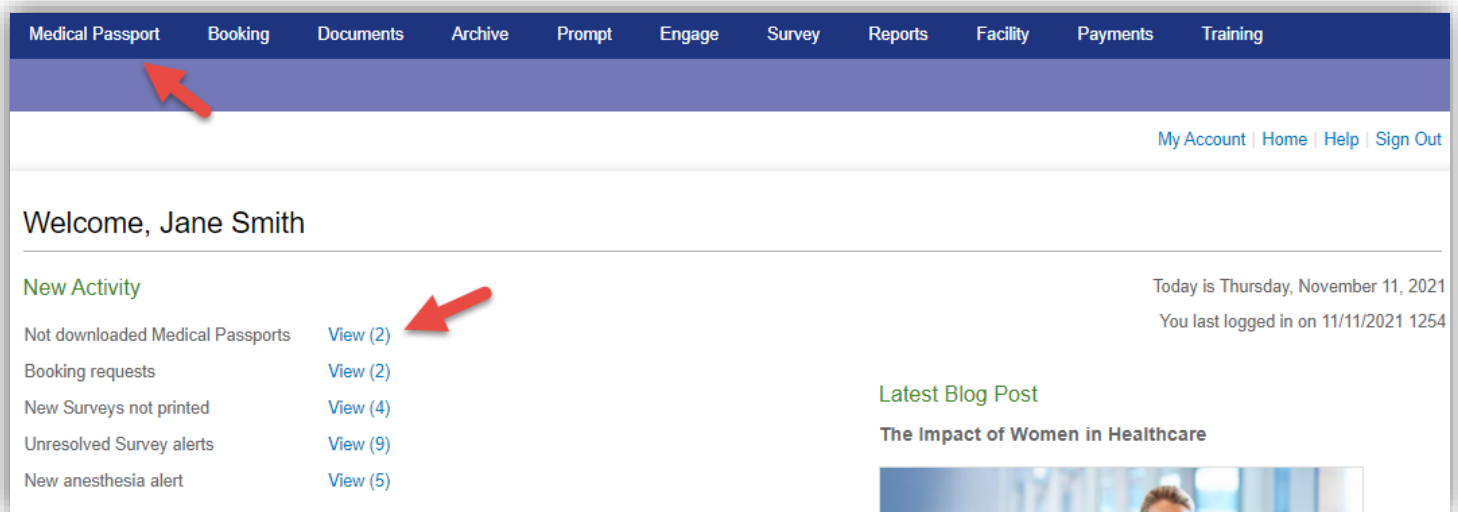
Medical Passport Updates

1. Medical Passport and Checklist tabs merged

- The Medical Passport and Checklist tabs have been merged!
- Some FAQs can be found [here](#), but this will guide you through the new Medical Passport tab in detail
- This section (A) of the update notes will detail the most common scenarios for using Medical Passport with subsequent sections (B & C) detailing less common scenarios that may not be applicable for your facility

A. Overview

- The Medical Passport tab may be accessed by using the 'Not downloaded Medical Passports' link on the account home page or by selecting the Medical Passports tab



Medical Passport | Booking | Documents | Archive | Prompt | Engage | Survey | Reports | Facility | Payments | Training

My Account | Home | Help | Sign Out

Patient Search

Medical Passport

Search By

Procedure date

Patient

All not downloaded

Date Search

Specific procedure date

Procedure date range

Specific printed date

Specific procedure date

Filter By

Room

November 22, 2021 - Monday

[Print list](#)

<input type="checkbox"/> Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
<input type="checkbox"/> Stewart, Stacie DOB: 09/19/1978 (43) (F) MRN: 111151155 (Linked MP/OR Schedule)	Upper Endoscopy / Esophagogastroduoden[...] (EGD) Pain Management Injection OR 1	Hope, Felipe	Downloaded Patient Created Uploaded	11/11/2021 1508	All
<input type="checkbox"/> Silver, Samuel DOB: 04/01/1992 (29) (M) MRN: 3265987455 (Medical Passport) Missing Policies and Disclosures: Patient Rights, Ownership, Advance Directive	Colonoscopy Surgical Procedure	Brown, Bobbie	In Progress Facility Created	11/11/2021 1020	All Notes: Patient cleared for procedure
<input type="checkbox"/> Miller, William DOB: 04/25/1965 (56) (M) MRN: 111151058 (Medical Passport) Missing Policies and Disclosures: All	Colonoscopy Surgical Procedure	Barham, Raymond	Incomplete Patient Created		Not Reviewed: All
<input type="checkbox"/> Sullivan, Martha DOB: 03/01/1954 (67) (F) (Medical Passport)	Colonoscopy Surgical Procedure	Barnham, Raymond	Not Downloaded Patient Created	11/17/2021 1142	Not Reviewed: All
<input type="checkbox"/> Cory, Kristina DOB: 06/05/1973 (48) (F) MRN: 211110333 (OR Schedule)	Tonsillectomy OR 2	Young, Alejandro	Scheduled Only		All Notes: Patient cleared for surgery

- When accessing the Medical Passports tab, the view defaults to today's date
- The green arrows may be used to change the date
 - Each column may be sorted
 - The Patient column shows the source: OR Schedule, Medical Passport, or Linked MP/OR Schedule (if the OR Schedule booking and Medical Passport are linked)
 - If using multi path, the pathway name shows in the 'Procedure' column
 - If using sub facilities, the facility name shows in the 'Procedure' column
 - If using the Room filter, the OR room shows in the Procedure column
 - The Status column contains Scheduled Only, Downloaded, Not Downloaded, Printed, or Incomplete (MP), followed by 'Facility Created' or 'Patient Created'
 - If Medical Passports are being Uploaded to an external scheduling system, 'Uploaded' will show in the Status column when the upload is complete

- If using the patient Checklist, 'Complete' or 'In Progress' is shown in the Status column and Not Reviewed: All' shows in the To Do List column until the Medical Passport is downloaded (once the patient is selected, 'All' will be shown)
- Common actions are shown when you hover over a patient row:
 - The actions for a completed Medical Passport are Select, Print, Notes, Text Report (if in use) and Upload
 - Incomplete Medical Passports may be selected and completed
 - Select 'More' to Edit Physician/Procedure, Link, access Checklist, and Create an Updated MP
 - Additional actions (if activated for your facility) may be shown under 'More': Nurse Warning, Edit Room (available for patients with only a Medical Passport or for Linked MP/OR Schedule patients that were booked without a room), Checklist, Documents, and Patient Files
 - Note that the Checklist and Notes options will not appear if Checklist is not utilized by your facility

The screenshot shows the Medical Passport interface with a navigation bar at the top containing: Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, Facility, Payments, Training. On the right side of the navigation bar are links: My Account | Home | Help | Sign Out.

The main content area is titled "Patient Search" and "Medical Passport". It features a search sidebar on the left with options: Search By (Procedure date selected, Patient, All not downloaded), Date Search (Specific procedure date, Procedure date range selected, Specific printed date), Start of date range (11/08/2021), End of date range (11/22/2021), and Filter By (Room: Select).

The main table displays search results for the period "November 08, 2021 - Monday - November 22, 2021 - Monday". The table has columns: Date of Procedure, Patient, Procedure, Physician, Status, Entered Date/Time, and To Do List. A "Print list" link is above the table.

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
11/08/2021	Lott, Shaun DOB: 04/19/1954 (67) (M) MRN: 111020236 (Linked MP/OR Schedule) Missing Policies and Disclosures: Patient Rights, Ownership, Advance Directive	Hysteroscopy Surgical Procedure OR 1	Kathryn	Facility Created	1601	Select, Print, Notes, Text Report, Upload, More
11/12/2021	Henderson, Harry DOB: 12/01/1983 (37) (M) MRN: 3265874211 (Medical Passport) Missing Policies and Disclosures: Patient Rights, Ownership, Advance Directive	Colonoscopy Surgical Procedure OR 2	Destiny	Facility Created	0921	Select, Print, Notes, Text Report, Upload, More
11/18/2021	Bernardino, Gayle J DOB: 05/15/1990 (31) (F) MRN: 82121111511185 (Linked MP/OR Schedule) Missing Policies and Disclosures: Patient Rights, Ownership, Advance Directive	A1 PULLEY RELEASE RIGHT RING FINGER AND LEFT RING FINGER*LATEX ALLERGY Surgical Procedure OR 2	Walker, Mark	Downloaded Facility Created	11/15/2021 1218	Select, Print, Notes, Text Report, Upload, More
11/18/2021	Lynn, Melody DOB: 05/24/1951 (70) (F) MRN: 211171214 (Linked MP/OR Schedule)	RIGHT Coronary artery bypass Surgical Procedure OR 2	Torres, Jacob	Downloaded Facility Created	11/17/2021 1119	Select, Print, Notes, Text Report, Upload, More

The "More" dropdown menu for the second row is open, showing the following options: Edit Physician/Procedure, Nurse Warning, Edit Room, Link, Checklist, Documents, and Create an Updated MP.

Searching for Patients

- Use the search options under 'Search By' on the left side to locate a patient
- Searching by procedure date or by patient will locate any Medical Passports, OR Schedule bookings, and linked Medical Passport/OR Schedule bookings for that date, date range, or patient
- Search by patient first name, last name, and date of birth to see a list of current and past procedures for a patient

The screenshot shows the 'Patient Search' interface. On the left, there are search filters: 'Search By' (Procedure date, Patient, All not downloaded), 'Patient Search' (First name, Last name, Date of birth, MRN), and 'Filter By' (Room). The main area displays a table of results for 'Silver, Sammy'. A 'More' dropdown menu is open for the entry dated 10/26/2021, showing options like 'Edit Physician/Procedure', 'Nurse Warning', 'Edit Room', 'Link', 'Checklist', 'Patient Files', and 'Create an Updated MP'. A red arrow points to the 'Create MP' button in the table row for 11/15/2021.

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
10/26/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	colonoscopy Surgical Procedure OR 2		Patient Created	1111	More
10/31/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	LEFT ACL Repair Surgical Procedure	Barham, Raymond	Downloaded Patient Created	10/22/2021 0914	All
11/01/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	BILATERAL hip replacement Surgical Procedure	Barnham, Raymond	Printed Patient Created	10/21/2021 1505	All
11/12/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	Colonoscopy Surgical Procedure OR 2	Barham, Raymond	Incomplete Patient Created		Not Reviewed: All
11/15/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 888888888 (OR Schedule)	Coronary artery bypass OR 1	Greene, Jackie	Schedule Only		Create MP, Notes, Checklist

- To see a list of Medical Passports that were printed today (or on another date), select search by 'Specific printed date' and enter a date
- This option is useful when patients have been removed from the Not Downloaded queue, or a printer goes off line when printing not downloaded Medical Passports and you need a list of Medical Passports that are no longer in the queue
- Note that Medical Passports that have a Date of Service that is more than a week past will be removed from the 'All Not Downloaded' list (this functionality is not new)

Patient Search

Medical Passport

Search By

- Procedure date
- Patient
- All not downloaded

Date Search

- Specific procedure date
- Procedure date range
- Specific printed date

Specific printed date

11/04/2021



Search

Print list

<input type="checkbox"/>	Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
<input type="checkbox"/>	11/08/2021	Silver, Sally DOB: 12/15/1987 (33) (F) MRN: 5656565656 (Linked MP/OR Schedule)	Breast biopsy Surgical Procedure OR 1	Stump, Ronald	Printed, Complete Patient Created Uploaded	11/03/2021 0752	Nothing Notes: Patient approved by anesthesiologist for procedure.
<input type="checkbox"/>	11/17/2021	Clutch, Bree DOB: 08/19/1960 (61) (M) (Medical Passport)	LEFT test Surgical Procedure	doctor2, na	Printed Patient Created	11/04/2021 1211	All

Creating an Updated Medical Passport

- To create an updated Medical Passport:
 - Locate the patient
 - Hover the mouse cursor over the patient's Medical Passport
 - Click More
 - Select 'Create an Updated MP'

The screenshot displays the 'Medical Passport' interface. On the left, there is a 'Patient Search' sidebar with filters for 'Search By' (Procedure date, Patient, All not downloaded) and 'Filter By' (Room). The main area shows a table of search results. The table has columns: 'Date of Procedure', 'Patient', 'Procedure', 'Physician', 'Status', 'Entered Date/Time', and 'To Do List'. A dropdown menu is open for the first patient, showing options: 'Edit Physician/Procedure', 'Nurse Warning', 'Edit Room', 'Link', 'Checklist', 'Patient Files', and 'Create an Updated MP'. A red arrow points to the 'Create an Updated MP' option. Another red arrow points to the 'Create MP' button in the table row for a patient with a scheduled OR 1 procedure.

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
10/26/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	colonoscopy Surgical Procedure OR 2		Patient Created	1111	More
10/31/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	LEFT ACL Repair Surgical Procedure	Barham, Raymond	Downloaded Patient Created	10/22/2021 0914	All
11/01/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	BILATERAL hip replacement Surgical Procedure	Barnham, Raymond	Printed Patient Created	10/21/2021 1505	All
11/12/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 7853251479 (Medical Passport)	Colonoscopy Surgical Procedure OR 2	Barham, Raymond	Incomplete Patient Created		Not Reviewed: All
11/15/2021	Silver, Sammy DOB: 05/15/1984 (37) (F) MRN: 888888888 (OR Schedule)	Coronary artery bypass OR 1	Greene, Jackie	Scheduled Only		Create MP

- Alternatively, if a patient's OR Schedule booking is selected instead of a Medical Passport, the option will be 'Create MP'

Adding a New Registration

- Ideally, it is best to locate an existing registration (if one exists) and create an updated version of a Medical Passport
- Before adding a new patient registration, search by patient name to review a list of existing patients
- The search may be narrowed by adding first name, date of birth and/or the patient MRN
- If the patient does not have an existing Medical Passport, use 'Add' to add a new patient registration
- Note that 'Add' does not appear until a patient search has been completed

The screenshot shows the 'Patient Search' page in the Medical Passport system. The top navigation bar includes 'Medical Passport', 'Booking', 'Documents', 'Archive', 'Prompt', 'Engage', 'Survey', 'Reports', 'Facility', 'Payments', and 'Training'. Below the navigation bar, there are links for 'My Account', 'Home', 'Help', and 'Sign Out'. The main content area is titled 'Patient Search' and features a search filter panel on the left and a table of results on the right.

Search By:

- Procedure date
- Patient
- All not downloaded

Patient Search Filters:

- First name (optional):
- Last name:
- Date of birth (optional):
- MRN (optional):

Search Results Table:

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
04/21/2021	Henderson, Jane DOB: 04/18/1978 (43) (F) MRN: 821210418042112 (OR Schedule)	(BIL) CYSTO URETEROSCOPY W/ LASER LITHO & BILATERAL STENT INSERTION OR 3	Martin, Destiny	Scheduled Only		All
07/01/2021	Henderson, Eugene DOB: 10/09/1971 (50) (M) MRN: 82121062807011 (OR Schedule)	RIGHT KNEE ARTHROSCOPIC SURGERY REMOVAL OF LOOSE FOREIGN BODY MICROFRACTURE OR 1	French, Diana	Scheduled Only		All

An 'Add' button is visible in the top right corner of the results area.

This screenshot shows the 'Patient Search' page after a search for 'Harry Henderson' with a date of birth of '12/1/1983'. The search results area displays 'No patients found'. A red arrow points to the 'Add' button in the top right corner, which is now visible and highlighted.

Search By:

- Procedure date
- Patient
- All not downloaded

Patient Search Filters:

- First name (optional):
- Last name:
- Date of birth (optional):
- MRN (optional):

Search Results:

No patients found

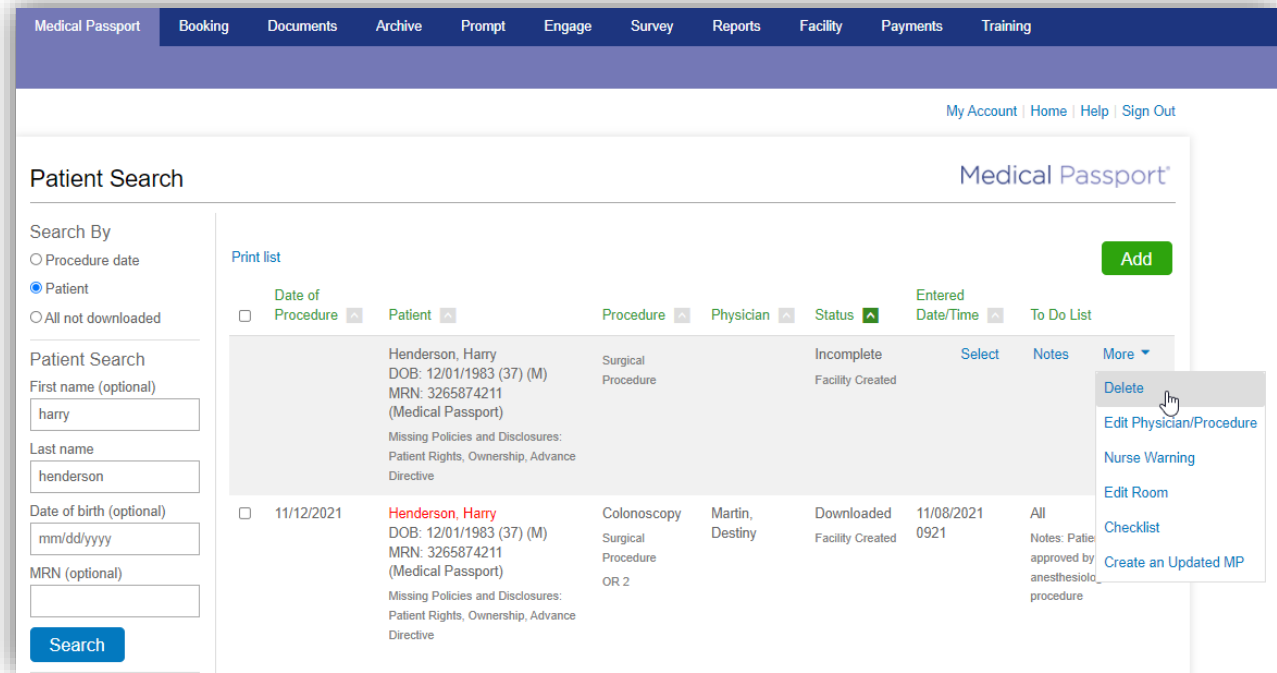
The 'Add' button is highlighted with a red arrow.

- Facility staff may select Quick or Standard registration

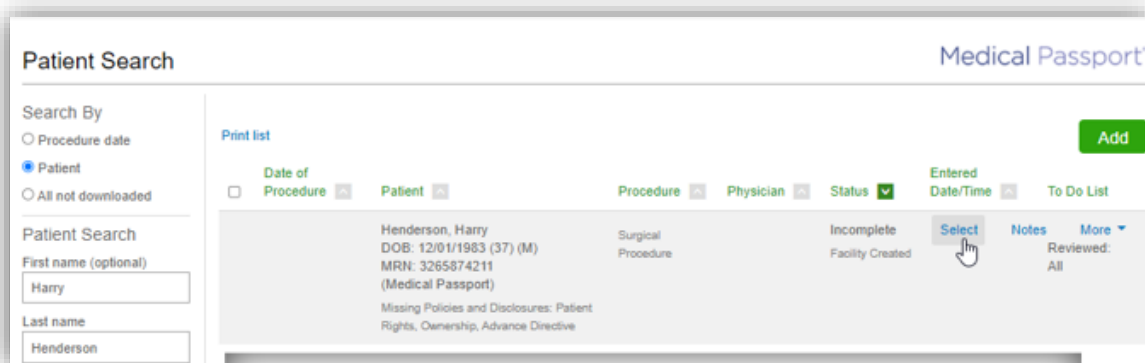
- If using multi path or sub facilities, selections are included in the Registration Type popup

Incomplete Medical Passports

- If a patient or facility staff started a Medical Passport, then left it incomplete, use the search options on the left to locate the incomplete Medical Passport



- If an incomplete Medical Passport was created for a patient that already has a completed Medical Passport, the 'Delete' action may be used
- The available actions for an Incomplete Medical Passport are:
 - Select
 - Notes
 - Delete
 - Edit Physician/Procedure
 - Checklist
 - Create an Updated MP
- Additional actions may show under 'More' (if activated for your facility), such as Nurse Warning and Edit Room
- Choosing 'Select' allows staff to complete an incomplete Medical Passport, regardless if it was created by the patient or by facility staff



Printing Medical Passports

- A single Medical Passport or multiple Medical Passports may be printed from the Medical Passport tab
- After searching for patients, check the box next to the Medical Passport and select 'Print selected' to print the selected Medical Passports
- Alternatively, all Medical Passports can be printed by clicking the top checkmark box, then clicking 'Print selected'

The screenshot shows the ONE Medical Passport web application interface. At the top, there is a navigation bar with tabs: Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, Facility, Payments, and Training. Below the navigation bar, there are links for My Account, Home, Help, and Sign Out. The main content area is titled 'Patient Search' and includes a 'Medical Passport*' label. On the left, there is a 'Search By' section with radio buttons for 'Procedure date', 'Patient', and 'All not downloaded' (which is selected). The main table displays search results with columns: Date of Procedure, Patient, Procedure, Physician, Status, Entered Date/Time, and To Do List. A red arrow points to the 'Print selected' link above the table. The table contains two rows of data:

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
11/22/2021	Miller, William DOB: 04/25/1965 (56) (M) (Medical Passport)	test Surgical Procedure	Bradley, Kevin	Not Downloaded Patient Created	11/10/2021 1227	Not Reviewed: All
11/22/2021	Stewart, Stacie DOB: 09/19/1978 (43) (F) (Medical Passport)	Injection in back Pain Management	Barnham, Raymond	Not Downloaded Patient Created	11/11/2021 1508	Not Reviewed: All

Printing Medical Passport Search Results (List)

- After searching for patients using one of the search methods on the left, simply click 'Print list'
- Note that this prints the list of results and does **not** print any Medical Passports
- If any of the checkboxes are checked, the 'Print list' option moves to the right

Medical Passport | Booking | Documents | Archive | Prompt | Engage | Survey | Reports | Facility | Payments | Training

My Account | Home | Help | Sign Out

Patient Search

November 08, 2021 - Monday

Print list

Search By

Procedure date

Patient

All not downloaded

Date Search

Specific procedure date

Procedure date range

Specific printed date

Specific procedure date

11/08/2021

Search

Filter By

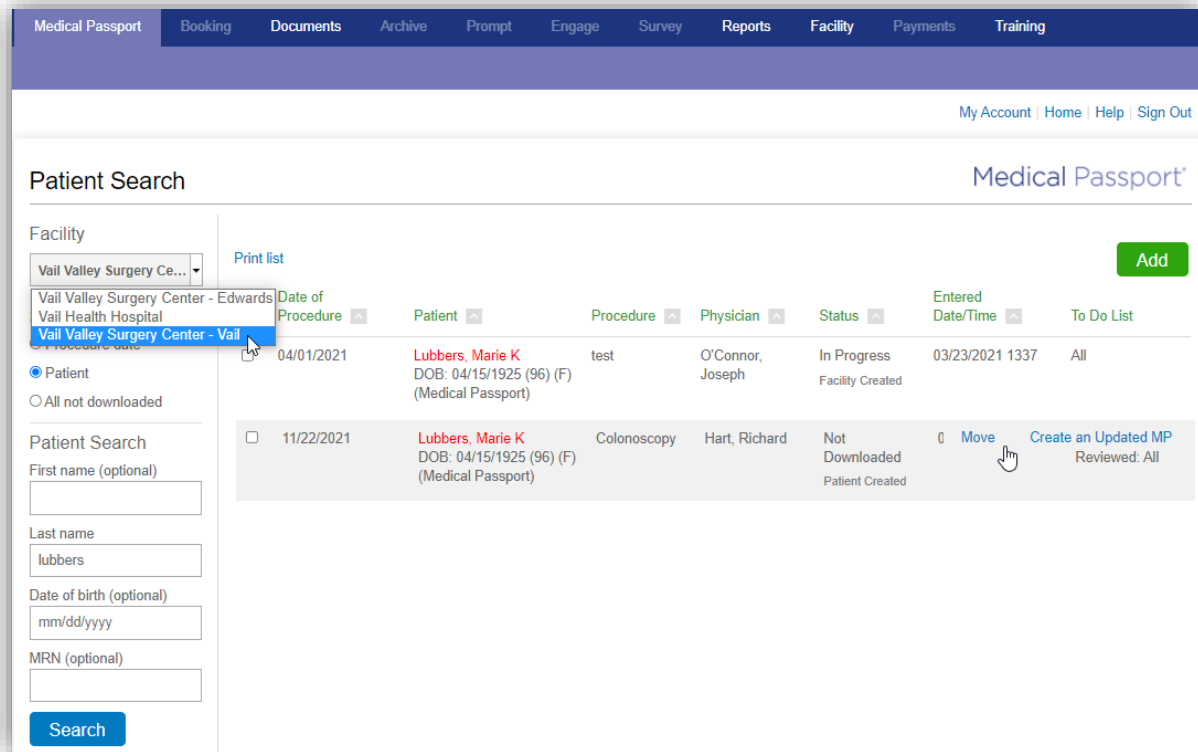
Room

Select

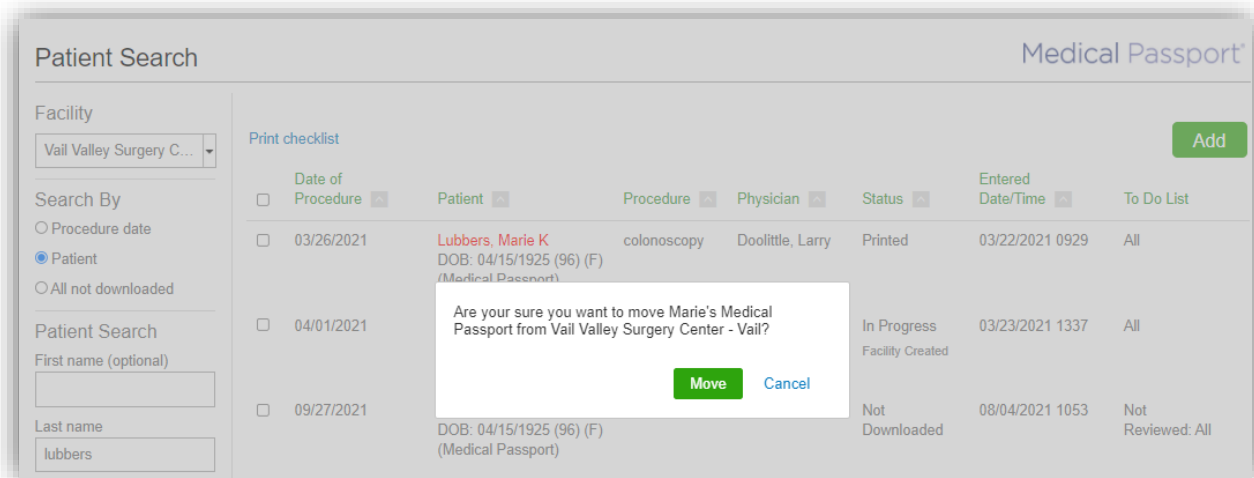
<input type="checkbox"/>	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
<input type="checkbox"/>	Lott, Shaun DOB: 04/19/1954 (67) (M) MRN: 111020236 (Linked MP/OR Schedule) Missing Policies and Disclosures: Patient Rights, Ownership, Advance Directive	Hysteroscopy Surgical Procedure OR 1	Olsen, Kathryn	Complete Facility Created	11/02/2021 1601	Nothing
<input type="checkbox"/>	Silver, Sally DOB: 12/15/1987 (33) (F) MRN: 5656565656 (Linked MP/OR Schedule)	Breast biopsy Surgical Procedure OR 1	Stump, Ronald	Printed, Complete Patient Created Uploaded	11/03/2021 0752	Nothing Notes: Patient approved by anesthesiologist for procedure.
<input type="checkbox"/>	Cuthbertson, Helen DOB: 08/07/1961 (60) (F) MRN: 211020236 (Linked MP/OR Schedule)	Inguinal hernia repairs Surgical Procedure OR 2	McKay, Richard	Printed, In Progress Facility Created	11/02/2021 1413	Nothing
<input type="checkbox"/>	Albrecht, Rose R DOB: 08/07/2016 (5) (F) MRN: 821211105110810 (OR Schedule)	Reexcision of Basal Cell Carcinoma For Positive Margin OR 1	Edwards, James	Scheduled Only		All

B. Sharing Medical Passports

- Note that the Sharing feature is not used for most facilities
- For facilities using Sharing, the Facility drop down filter was added to the Procedure Date and Patient Search
- The default selection is the facility the staff member is logged into Comprehensive Sharing
- When using Comprehensive Sharing, if the facility drop down is changed to another facility and a patient has a Medical Passport for that facility, the 'Move' action may be used to move the Medical Passport over to the staff member's facility
- Create an Updated MP and print are also available



- Selecting the 'Move' action opens a confirmation popup message



- When using the Facility filter to locate patients, facility staff may view ‘Scheduled Only’ patients created for other shared locations, but no actions may be completed for the patient

The screenshot shows the Medical Passport Patient Search interface. The top navigation bar includes Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, Facility, Payments, and Training. The main header area contains 'My Account | Home | Help | Sign Out' and the Medical Passport logo. The 'Patient Search' section is active, with the 'Facility' dropdown set to 'Vail Health Hospital'. The search criteria are: 'Search By' Procedure date, 'Date Search' Specific procedure date, and 'Specific procedure date' 11/08/2021. The search results table shows a patient named Brown, Billy, with DOB 01/06/1980 (41) (M) and MRN 111031236, scheduled for an ERCP procedure on November 08, 2021, at Vail Health Hospital. The status is 'Scheduled Only' and the 'To Do List' is 'All'. A red arrow points to the 'Facility' dropdown menu.

- If the OR Schedule booking was created for the staff member’s facility, they may create a Medical Passport, add Notes, and access Checklist

The screenshot shows the Medical Passport Patient Search interface. The top navigation bar includes Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, Facility, Payments, and Training. The main header area contains 'My Account | Home | Help | Sign Out' and the Medical Passport logo. The 'Patient Search' section is active, with the 'Facility' dropdown set to 'Vail Valley Surgery C...'. The search criteria are: 'Search By' Procedure date, 'Date Search' Specific procedure date, and 'Specific procedure date' 11/08/2021. The search results table shows a patient named Long, Jonas, with DOB 03/13/1983 (38) (M) and MRN 111031236, scheduled for a Colonoscopy procedure on November 08, 2021, at Vail Valley Surgery Center. The status is 'Scheduled Only' and the 'To Do List' includes 'Create MP', 'Notes', and 'Checklist'. A hand cursor is over the 'Create MP' link.

Expanded Sharing

- If using Expanded Sharing, use the Facility filter is to locate patients at shared facilities
- The Medical Passport may be printed or 'Create an Updated MP' may be used to create a copy of the Medical Passport

The screenshot shows the ONE Medical Passport interface for Banner Cardiovascular. The 'Patient Search' section is active, with a search filter set to 'Banner Cardiovascul...'. A red arrow points to the 'Facility' dropdown menu. The search results table shows a patient named Sally Silver with a colonoscopy procedure. A 'Create an Updated MP' button is visible next to the patient's name.

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
11/08/2021	Silver, Sally DOB: 12/15/1987 (33) (F) (Medical Passport)	colonoscopy	Unknown, Doctor	Not Downloaded	11/05/2021 1	Create an Updated MP All

- Standard sharing allows facility staff to create an updated version of a facility created Medical Passport for the other location.

The screenshot shows the ONE Medical Passport interface for Inova Northern Virginia Ambulatory Surgery Center. The 'Patient Search' section is active, with search criteria for 'Reed, Kelsey'. A dropdown menu is open, showing options like 'Edit Physician/Procedure', 'Checklist', 'Create an Updated MP', and 'Create MP at Inova Loudoun A...'. A mouse cursor is pointing at the 'Create MP at Inova Loudoun A...' option.

Date of Procedure	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List		
11/22/2021	Reed, Kelsey DOB: 04/11/1995 (26) (F) (Medical Passport)	colonoscopy	Unknown, Doctor	Downlo...	Select	Print	Notes	More

C. Sub Facilities

- For facilities using multiple Sub facilities, there was previously a sortable location column on the All Not Downloaded view and when searching by date on the Medical Passport tab
- The sub facility location (if selected) appears in the procedure column

The screenshot shows the Medical Passport Patient Search interface. The top navigation bar includes Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, Payments, and Training. The main header shows 'Medical Passport' and navigation links for My Account, Home, Help, and Sign Out.

Patient Search

Search By:

- Procedure date
- Patient
- All not downloaded

Date Search:

- Specific procedure date
- Procedure date range
- Specific printed date
- Specific procedure date

 Specific procedure date: 11/08/2021

Filter By:

- Location: Select

Navigation: November 08, 2021 - Monday

Print checklist

<input type="checkbox"/>	Patient	Procedure	Physician	Status	Entered Date/Time	To Do List
<input type="checkbox"/>	Edwards, Patricia DOB: 04/08/1966 (55) (F) MRN: 111030340 (MP/OR Schedule) Missing Policies and Disclosures: All	Inguinal hernia repairs Surgical Procedure Florida Medical Clinic ASC - Zephyrhills	Rojas, Daniel	In Progress Facility Created	11/03/2021 1551	Surgical H&P, Surgical Consent, Anesthesia Consent, Pre-Procedure Phone Call
<input type="checkbox"/>	Goll, Scott DOB: 11/25/1987 (33) (M) MRN: 111030339 (MP/OR Schedule) Missing Policies and Disclosures: All	BILATERAL Breast biopsy Surgical Procedure	Bence, Mary	Downloaded Facility Created	11/03/2021 1630	All
<input type="checkbox"/>	Ladd, Richard DOB: 03/05/1940 (81) (M) MRN: 111030400 (OR Schedule)	Colonoscopy	Peterson, Sean	Scheduled Only		All
<input type="checkbox"/>	Silver, Shannon DOB: 10/01/2018 (3) (F) (Medical Passport)	Colonoscopy Surgical Procedure Florida Medical Clinic ASC - North Tampa	Unknown, Doctor	Downloaded	11/03/2021 1543	All

- The Location filter may be used to refine the search

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Location' filter dropdown menu, which is now set to 'Florida Medical Clini...'. This demonstrates how the filter can be used to refine search results.

2. Remove Zip Code from Preferred Pharmacy

- We added a new setting to allow facilities to remove the Zip field from the Physician & Pharmacy Information screen if the pharmacy address is included
- Speak with your customer success manager to configure this
- This option will remain on by default
- If set to No, the Zip field is removed from the preferred pharmacy address on the Physician & Pharmacy Information screen

Account Registration
Patient & Visit Information
Health History
Review & Send

Physician & Pharmacy Information

[Back](#) | [Home](#) | [Help](#) | [Sign Out](#)

Primary Care Physician Do you have a primary care physician?

Yes No

Specialist Are you treated on a regular basis by a specialist (e.g. cardiologist, neurologist)?

Yes No

Preferred Pharmacy

Preferred pharmacy name

Address line 1

Address line 2 (optional)

Location/City

State

- Select -
▼

Phone (optional)

Alternate pharmacy (optional)

[Back](#)
Save & Continue

Booking Update

1. Conversations Now Support Attachments

- Facility and office staff may now add attachment(s) when starting or responding to a Conversation by selecting the 'Upload' link

The screenshot shows the 'Start Conversation' form in the Booking tab. The form includes the following fields and options:

- Title:** OP Notes for 11/16/2021
- Expiration date:** 11/19/2021
- Time (optional):** 1000
- Facility:** Alaska Eye Surgery and Laser Center
- Scheduler:** Scheduler
- Staff:**
 - Nelson, Alecia
 - Fuller, Candice
- Start conversation:** Enter message
- Attachments:** [Upload](#) (highlighted with a red arrow)
- Send:**

- Selecting 'Upload' on the Conversation screen allows facility and office schedulers with access to the Booking tab to upload or drag and drop documents and attach them to conversation.
- Supported file types: PDF, TIF, PNG, JPG, DOC and DOCX (MS Word), XLS and XLSX (MS Excel), and ZIP files
- File names and types being uploaded show on the screen. Once 'Attach' is selected, staff is returned to the conversation.

Documents | Booking | Office | Training

Procedure | Conversations | Start C

Start Conversation

Title
OP Notes for 11/16/2021

No expiration date

Expiration date: 11/19/2021 | Time (optional): 1000

Facility
Alaska Eye Surgery and Laser Center

Scheduler

Nelson, Alecia

Fuller, Candice

Start conversation
Enter message

Attachments Upload

Privacy Policy | © 2000-2021 One Medical

Upload Attachments

Click on Upload to choose the document from your drive or drag the file over the box, then click Save to upload the document. Supported file types: PDF, TIF, PNG, JPG, DOC and DOCX (MS Word), XLS and XLSX (MS Excel), and ZIP files.

COSMETIC ABDOMINOPLASTY OPERATIVE NOTE

Patient Name: _____

Date of Operation: _____

Height: _____ Weight: _____

Pre-Operative Diagnosis: Abdominal Skin Laxity
Localized Adiposity at Abdomen & Flanks
Lower Abdominal Wall Diastasis

Post-Operative Diagnosis: Same
Abdominal & Flanks Symmetry & Skin Tightening Achieved
Correction of Diastasis Achieved

Procedure: Targeted Abdominal & Flanks Tumescence Liposuction
Umbilicoplasty with Transposition
Rectus Fascia Midline Plication, Lower Abdomen
Lipo-Abdominoplasty

Surgeon: Dr. _____

Anesthesia: Local w/ Tumescence Lidocaine Infiltration

Fluids: PO water, PO antibiotics

Drains: None

EBL: Minimal

Liposuction Aspirate: _____ ml Total, _____ ml Fat

Condition: Stable

Clinical Findings:
This is a _____-year-old female with a pre-operative diagnosis described above who after a discussion of the risks, benefits and expected outcomes of all treatment alternatives, consented to the procedure described above and signed written informed consent.

Description of Procedure:
Prophylactic antibiotics were administered orally prior to surgery in the operative suite. The patient, in the standing position, was marked for cosmetic abdominal wall surgery and photographs were taken.

She was then prepped and draped in the usual sterile fashion for abdominal wall cosmetic surgery, anti-embolic intermittent pneumatic compression stockings were placed on the lower extremities. An adequate level of tumescence local anesthesia was administered to the targeted regions and adequate time was given for the anesthetic to take full effect.

The procedure was initiated with manual liposuction of the superficial and deep subcutaneous fat layers through lower abdominal and flank incisions placed along the bikini line. Liposuction of the abdomen and flanks was performed with 3-mm blunt-tipped cannulas in standard fashion until the desired abdominal wall and flank contours were

1

- Additional files may be uploaded, existing files may be opened or deleted before sending the conversation

Start Conversation Booking™

Title

No expiration date

Expiration date Time (optional)

Facility

Scheduler

Nelson, Alecia

Fuller, Candice

Start conversation

Attachments [Upload](#)

[OP Notes for 11.16.2021.jpg](#)

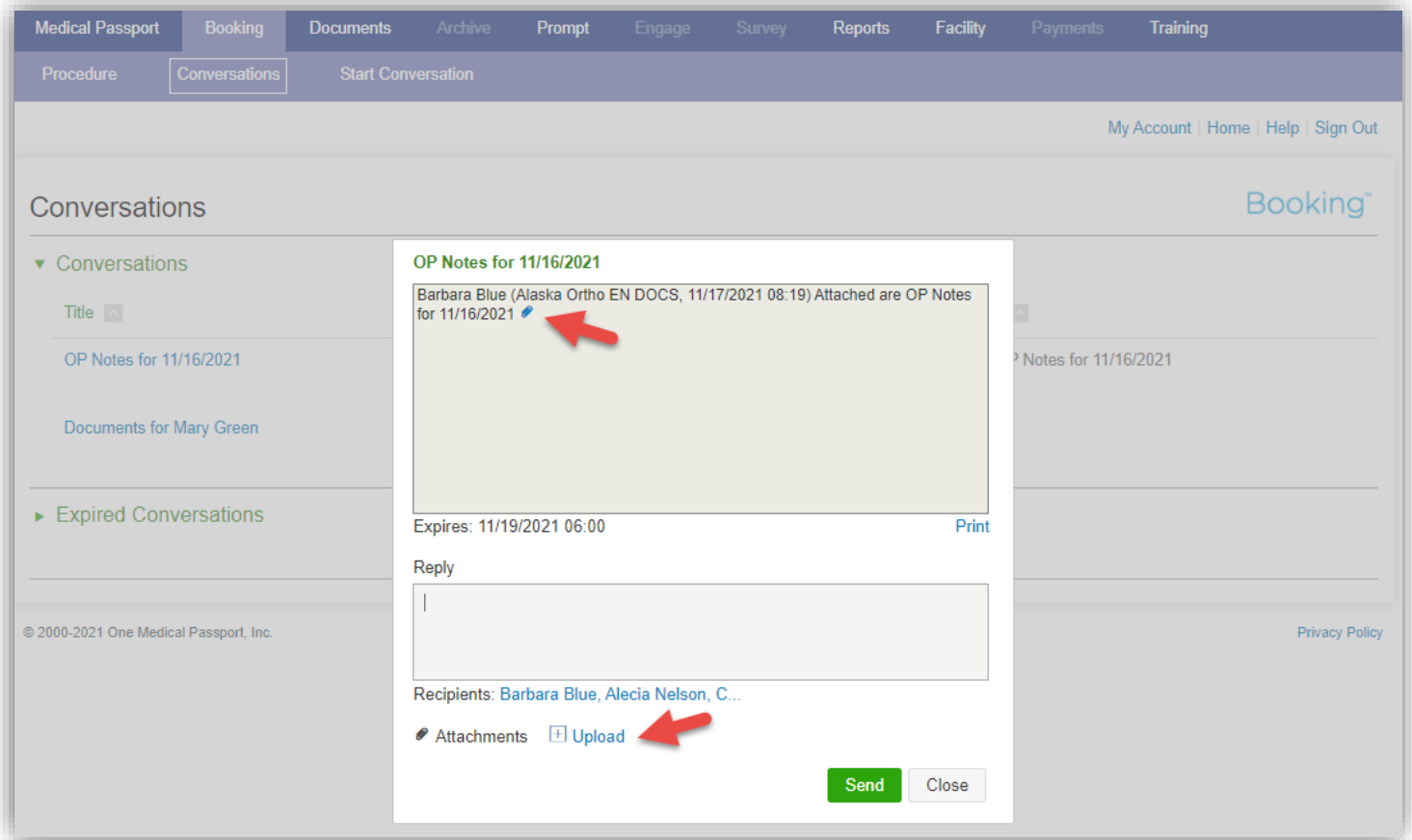
- When facility or office staff access a conversation, if the Conversation has attachment(s), they may click the paperclip icon to select the files, download and print the attachment

Conversations Booking™

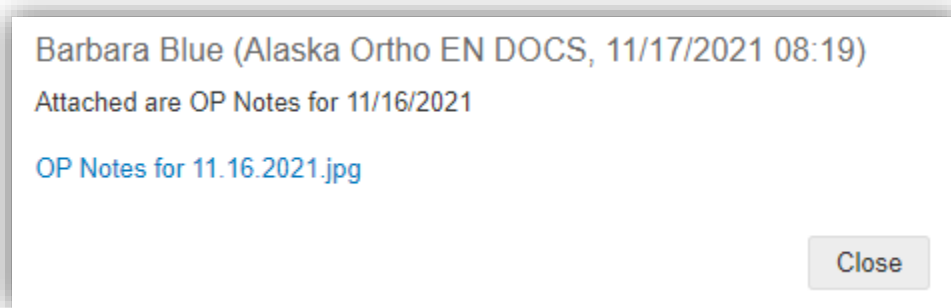
▼ Conversations

Title	Updated	Updated By	Status	Last Message
(1) OP Notes for 11/16/2021	11/17/2021 08:19	Barbara Blue (Alaska Ortho EN DOCS)	Open	Attached are OP Notes for 11/16/2021

- Additional attachments may be uploaded and sent with the conversation.



- Click the paperclip to view and download documents.



- If the conversation is expired, you can no longer upload new attachments but you can view and download existing attachments

2. General History Review

- We added a link to allow facility staff to review their existing General History options
- This is located under the Facility tab

The screenshot shows the Medical Passport interface with the following structure:

- Top Navigation:** Medical Passport, Booking, Documents, Archive, Prompt, Engage, Survey, Reports, **Facility**, Payments, Training
- Facility Sub-Menu:** Facility Information, Facility Staff, Office Staff, Physician List
- Right Side:** My Account | Home | Help | Sign Out
- Facility Management Section:**
 - Facility Information:** Insurance Information, Manage Engage Hold Dates
 - Facility Staff:** New staff security PIN: 840927 ⓘ Reset PIN; Update, Review, Add; Reset Password, Delete
 - Office Staff:** Update / Review
 - Physician List:** Physicians (by Group), Physicians (by Name)
 - Medical Passport Configuration (View Only):** Pre-Operative Instructions, Policies & Disclosures, Clinical Significance Settings
 - Configuration Grid:**

Basic Screening	General History	Allergies	Past Medical History
PreOp Visit	PreOp Visit	PreOp Visit	PreOp Visit
Pain Management	Pain Management	Pain Management	Pain Management
All GI procedures	All GI procedures	All GI procedures	All GI procedures
Cataract	Cataract	Cataract	Cataract

- This allows facility staff to review or print a list of their General History options by pathway.

11/8/21, 1:19 PM https://www.stagingonemedicalpassport.com/app/Facility/Manage/general-history-report?passtype_id=11

ONE MEDICAL PASSPORT **General History Report** Pathway: Cataract

Preparation
 Purpose of this surgery
 Yes No
 Concerns that your surgical team should know
 Yes No Yes/No
 Concern text:
 Do you have any concerns that your surgical team should know?
 Large size Omit from other Mandatory
 Feel completely prepared
 Yes No
 Medical research study
 Yes No
 Interest in Screening Colonoscopy
 Yes No
 Type of procedure This setting applies to all pathways
 Yes No

Living Conditions
 Who lives with
 Peds Only All No
 Current living conditions
 Yes No
 Altitude
 Yes No

Personal History
 Was adopted
 Peds Only All No
 Who has legal custody
 Peds Only All No
 Contact or visit restrictions
 Peds Only All No
 Major life changes
 Yes No

Physical Status
 Confined to a bed for the last 72 hours or longer
 Yes No
 Can lay flat for procedure
 Yes No
 Can lay flat after waking
 Yes No
 Can lay flat without difficulty breathing
 Yes No
 Neck circumference (adults only)
 Yes No
 Alternate neck circumference (M-17 in F-18 in for adults only)
 Yes No
 Major trauma
 Yes No
 Medical reason that one of your arms cannot be used for IV, labs, or blood pressure
 Yes No
 Potty trained (specify age)
 Yes No

Print 3 pages
 Destination Save as PDF
 Pages All
 Layout Portrait
 More settings

Save Cancel

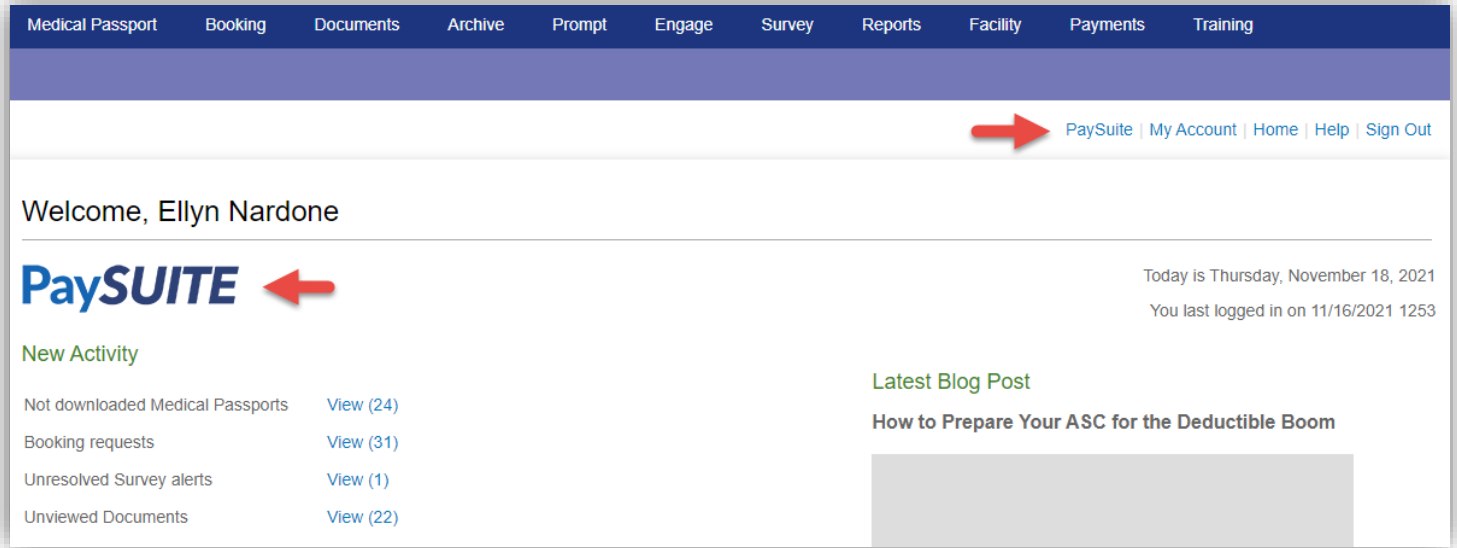
Altitude
 Yes No

Personal History
 Was adopted
 Peds Only All No

PaySuite

1. PaySuite Integration

- Mnet's PaySuite technology integrates with patient accounting systems, merchant gateways, and patient payment engagement software to enhance functionality and to provide the patient with a seamless payment experience
- Speak with your customer success manager for more information on PaySuite
- Once a facility user is configured, they are able to access the PaySuite links from the facility account home
- If they click the PaySuite logo or access the link, they are automatically logged in





Statements

View your facility statements

Text to PAY

Text To Pay Enrollment

Enroll patients in an estimated billing plan and text campaign before their date of service



Text To Pay Patient Management

Manage patients who are enrolled in Text To Pay!



44

Pending QR Code Text To Pay Enrollments

Complete pending patient QR Code enrollments



User Bulk Import

Import users to PaySuite from CSV file