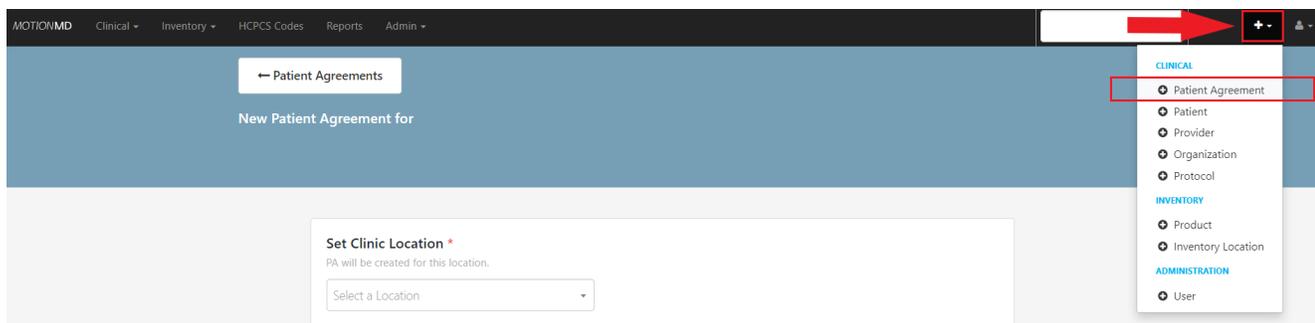


SEARCH EMR FEATURE

A new feature called **Search EMR** has been built to accommodate the need to synchronize or refresh data from the EMR to MotionMD in real-time. This feature can be used for retrieving missing patients, missing insurance information and missing patient demographics. The Search EMR feature is only viable for specific types of integrations. The Integration team has identified and enabled the feature in the accounts where this feature will work. If enabled, a new Search EMR button will be visible on the New Patient Agreement (PA) page, in the Patient Demographics section and Payment Method section on the PA.

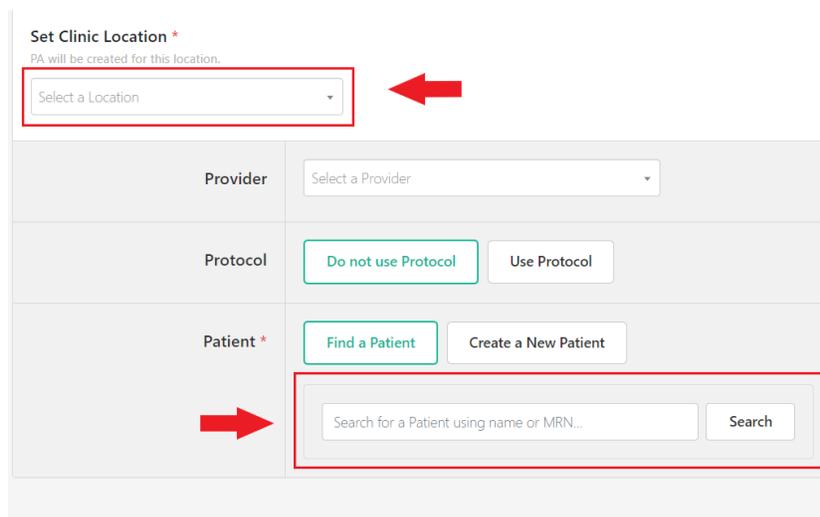
New Patient Agreement Page Search EMR

On the MotionMD site, click on the plus sign (+) and select **Patient Agreement** in the drop down.



On the **New Patient Agreement (PA)** page, set the Clinic Location. Then search for patients by MRN and click **Search**.

NOTE: This feature will only work if the search uses the MRN as that is the unique patient identifier between the MotionMD Patient Record and the EMR.



SEARCH EMR FEATURE

New Patient Agreement Page Search EMR (Continued)

Patient/MRN results will appear and the new **Search EMR** button is presented above the search results. In this example, the patient's first and last name is 00036Test.

Select the Patient/MRN in the results list and click the **Search EMR** button. A spinning wheel will indicate the search to look for any missing information from the EMR is in process.

After the spinning wheel disappears, the Patient Record will be updated if the EMR is able to provide any updates to the MotionMD Patient Record. In this example, the Patient's name was updated in the EMR to 00037Test and is now updated in MotionMD. Click the Patient/MRN to proceed in creating a new Patient Agreement.

SEARCH EMR FEATURE

New Patient Agreement Page Search EMR (Continued)

Using the new **Search EMR** feature on the **New PA page** updates the Patient Record in MotionMD with additional or new patient information from the EMR if it was not previously uploaded in MotionMD. For example, if the initial Patient Record in MotionMD for a Patient did not include Payor information, using the **Search EMR** feature will pull in the Payor information if it is now available in the EMR. If no additional or new information has been updated in the EMR, the MotionMD Patient Record will not update.

Updating Manually Created Patients on the New PA Page

If a Patient needed to be manually created in the past, the MotionMD Patient Record can be updated using the Search EMR button on the **New PA page**.

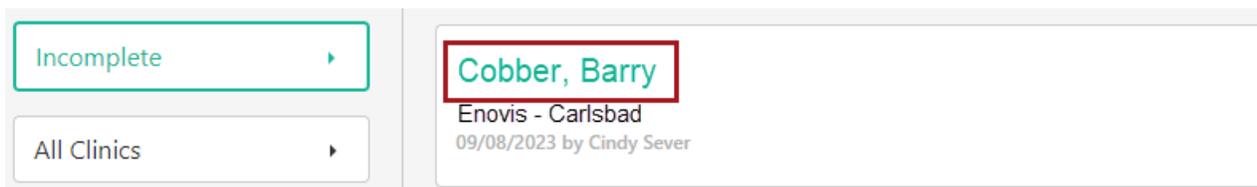
To update a manually created patient with information from the EMR, first ensure the Patient Record includes the MRN .

Search for the MRN on the **New PA page**. Once the search results have been returned, click on the matching Patient/MRN, and click the Search EMR button. This will update the manually created MotionMD Patient Record with information from the EMR.

Patient Demographics Section Refresh From EMR

This feature is located within the PA when the Patient Demographics section is edited.

Locate the Patient Agreement (PA) you are working on. In this example, the Patient name is Cobber, Barry.



The screenshot shows a form with two main sections. The left section contains two dropdown menus: the top one is labeled 'Incomplete' with a right-pointing arrow, and the bottom one is labeled 'All Clinics' with a right-pointing arrow. The right section contains a patient record for 'Cobber, Barry', which is highlighted with a red box. Below the name, it says 'Enovis - Carlsbad' and '09/08/2023 by Cindy Sever'.

SEARCH EMR FEATURE

Patient Demographics Section Refresh From EMR (Continued)

On the **PA** page, click the **Edit** button in the **Patient Demographics** section.

Barry Cobbler

ID 598038 • Enovis - Carlsbad
Created on 09/08/23 (Updated 09/08/23) by Cindy Sever

Archive View Activity Print ▾

<input checked="" type="checkbox"/> 0/0 Incomplete Not Submitted	Missing 6 Billing Requirements	<input checked="" type="checkbox"/> ICD-10 Codes Attached <input checked="" type="checkbox"/> Product Added <input checked="" type="checkbox"/> Payment Method Added	<input checked="" type="checkbox"/> Patient Signed <input checked="" type="checkbox"/> Provider Signed
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Patient Demographics Edit	Medical Information Edit																														
<table border="0"> <tr><td>Name</td><td>Barry Cobbler</td></tr> <tr><td>Gender</td><td>Female</td></tr> <tr><td>Birthdate</td><td>2000-09-09</td></tr> <tr><td>MRN</td><td>S88334456</td></tr> <tr><td>Address</td><td>00028 Main Rd, Baltimore, MD 21212</td></tr> <tr><td>Phone #</td><td>213-000-0001</td></tr> <tr><td>Mobile #</td><td>214-000-0001</td></tr> <tr><td>Email</td><td>00028Test@Test.com</td></tr> <tr><td>Emergency Contact</td><td>EmergencyF 00028EmergencyL</td></tr> <tr><td>Emergency Phone</td><td>802-370-0001</td></tr> </table>	Name	Barry Cobbler	Gender	Female	Birthdate	2000-09-09	MRN	S88334456	Address	00028 Main Rd, Baltimore, MD 21212	Phone #	213-000-0001	Mobile #	214-000-0001	Email	00028Test@Test.com	Emergency Contact	EmergencyF 00028EmergencyL	Emergency Phone	802-370-0001	<table border="0"> <tr><td>Provider</td><td>No provider set</td></tr> <tr><td>Order Date</td><td></td></tr> <tr><td>Injury Date</td><td></td></tr> <tr><td>Surgery Date</td><td></td></tr> <tr><td>Length of Need</td><td></td></tr> </table>	Provider	No provider set	Order Date		Injury Date		Surgery Date		Length of Need	
Name	Barry Cobbler																														
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Mobile #	214-000-0001																														
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Emergency Contact	EmergencyF 00028EmergencyL																														
Emergency Phone	802-370-0001																														
Provider	No provider set																														
Order Date																															
Injury Date																															
Surgery Date																															
Length of Need																															

When the Edit section opens, the new **Refresh from EMR** button will appear above the patient information.

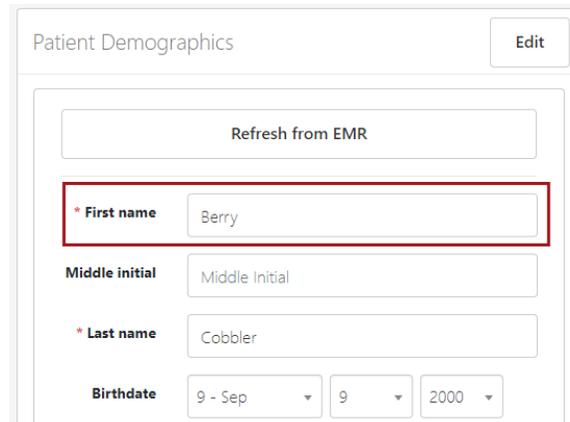
<input checked="" type="checkbox"/> 0/0 Incomplete Not Submitted	Missing 6 Billing Requirements	<input checked="" type="checkbox"/> ICD-10 Codes Attached <input checked="" type="checkbox"/> Product Added <input checked="" type="checkbox"/> Payment Method Added	<input checked="" type="checkbox"/> Patient Signed <input checked="" type="checkbox"/> Provider Signed
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Patient Demographics Edit	Medical Information Edit																		
<div style="border: 1px solid red; padding: 5px; text-align: center; margin-bottom: 10px;"> Refresh from EMR </div> <table border="0"> <tr><td>* First name</td><td><input type="text" value="Barry"/></td></tr> <tr><td>Middle initial</td><td><input type="text" value="Middle Initial"/></td></tr> <tr><td>* Last name</td><td><input type="text" value="Cobbler"/></td></tr> <tr><td>Birthdate</td><td> <input type="text" value="9 - Sep"/> <input type="text" value="9"/> <input type="text" value="2000"/> </td></tr> </table>	* First name	<input type="text" value="Barry"/>	Middle initial	<input type="text" value="Middle Initial"/>	* Last name	<input type="text" value="Cobbler"/>	Birthdate	<input type="text" value="9 - Sep"/> <input type="text" value="9"/> <input type="text" value="2000"/>	<table border="0"> <tr><td>Provider</td><td>No provider set</td></tr> <tr><td>Order Date</td><td></td></tr> <tr><td>Injury Date</td><td></td></tr> <tr><td>Surgery Date</td><td></td></tr> <tr><td>Length of Need</td><td></td></tr> </table>	Provider	No provider set	Order Date		Injury Date		Surgery Date		Length of Need	
* First name	<input type="text" value="Barry"/>																		
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Provider	No provider set																		
Order Date																			
Injury Date																			
Surgery Date																			
Length of Need																			

SEARCH EMR FEATURE

Patient Demographics Section Refresh From EMR (Continued)

Upon clicking the **Refresh from EMR** button the patient's first name updated to 'Berry' as an example of the patient's name having been updated in the EMR and the new name populates on the PA.



The screenshot shows a 'Patient Demographics' form with an 'Edit' button in the top right. A 'Refresh from EMR' button is located at the top of the form. Below it, the 'First name' field is highlighted with a red box and contains the text 'Berry'. Other fields include 'Middle initial' (Middle Initial), 'Last name' (Cobbler), and 'Birthdate' (9 - Sep, 9, 2000).

Using the new **Refresh From EMR** feature within the Patient Demographics section updates patient demographic information in MotionMD in the same way the **Search EMR** feature did on the **New PA page**. If no additional or new information has been updated in the EMR, the MotionMD Patient Demographics section will not update.

The Edit modal will remain open and allow Users to add any additional or missing information before clicking the Save Changes button.

Payment Methods Section Refresh From EMR

This feature is located on the **Payment Methods section** and the button will only appear prior to Importing any Payors onto the PA.

In this example, the patient states they have new insurance that is not Aetna.

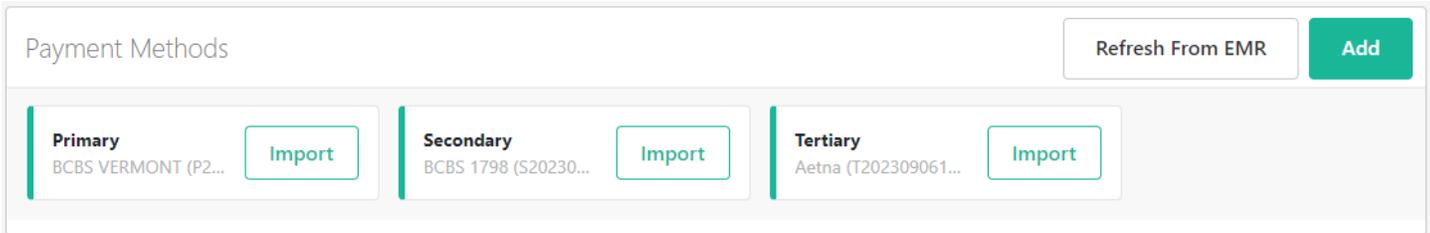


The screenshot shows a 'Payment Methods' section with a 'Refresh From EMR' button highlighted by a red box. To the right of this button is a green 'Add' button. Below the buttons, there is a list item for 'Tertiary' with 'Aetna (T202309061...' and an 'Import' button.

SEARCH EMR FEATURE

Payment Methods Section Refresh From EMR (Continued)

After clicking the Refresh from EMR button, two additional Payors have been pulled in from the EMR.



Payment Methods		Refresh From EMR	Add		
Primary BCBS VERMONT (P2...	Import	Secondary BCBS 1798 (S20230...	Import	Tertiary Aetna (T202309061...	Import

Using the new **Refresh From EMR** feature on the **Payment Methods section** updates Patient Insurance in MotionMD with additional or new payor and insurance information from the EMR if it was not previously uploaded in MotionMD. If no additional or new information has been updated in the EMR, the MotionMD Payment Method will not update.

Special Considerations

There may be instances where the **Search EMR** or **Refresh from EMR** feature will not pull patient demographics or insurance into MotionMD. If the above steps were followed and patient information is still missing, please open an [Integration Help Desk ticket](#).