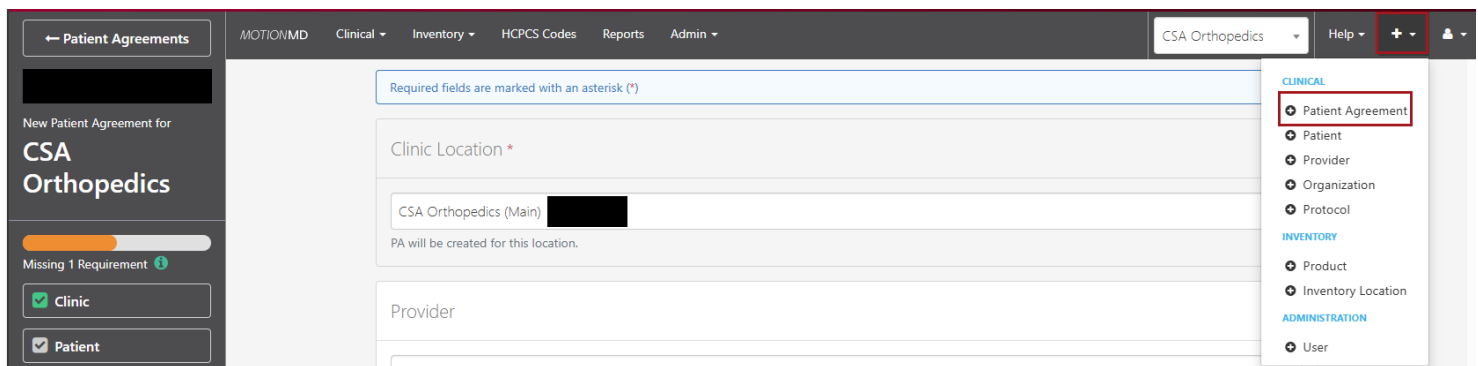## SEARCH EMR FEATURE

A 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.
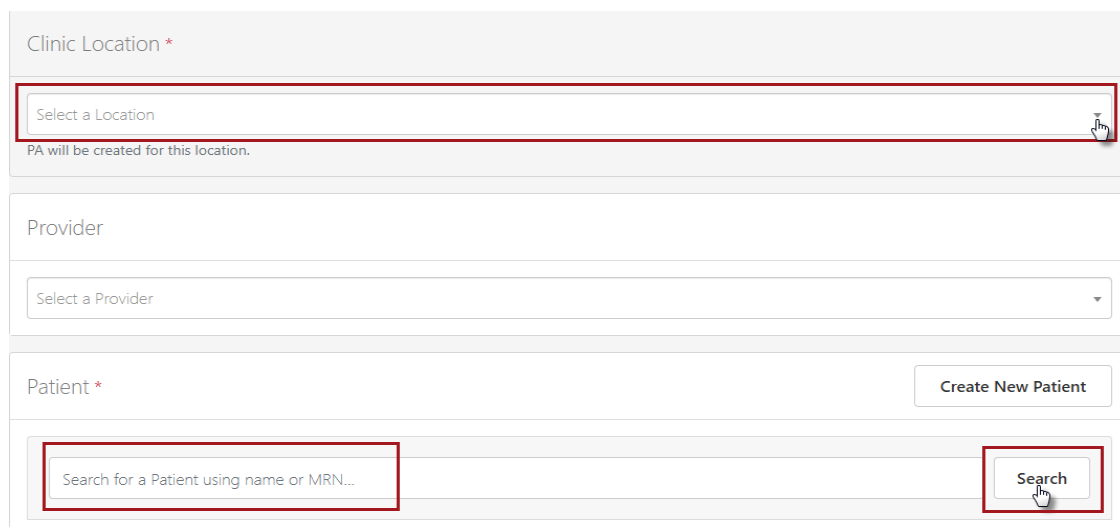
New Patient Agreement Page Search EMR

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.
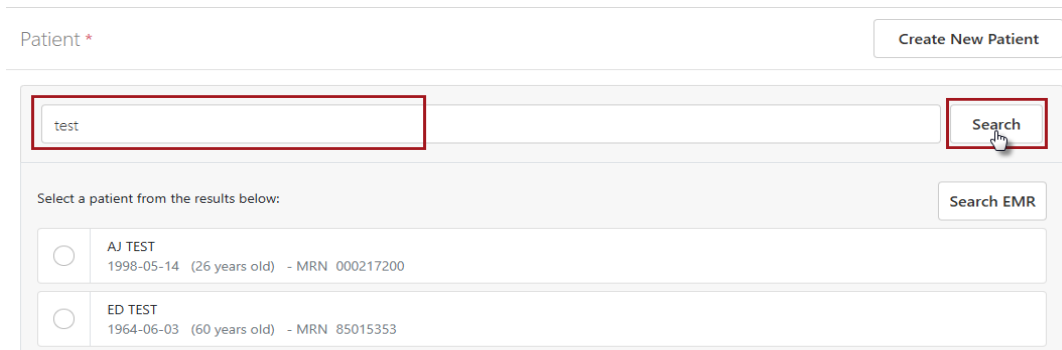
SEARCH EMR FEATURE

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 AJ Test.
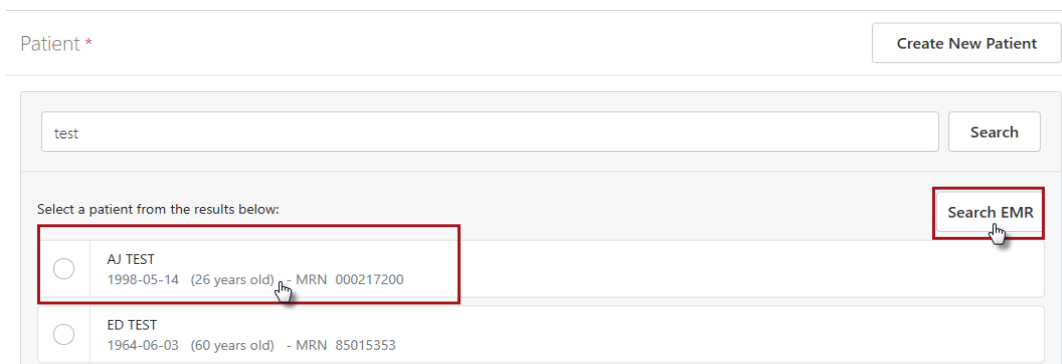

Select the Patient/MRN in the results list and click the **Search EMR** button. A spinning wheel will indicate the search to look for any missing information from the EMR is in process.

After the spinning wheel disappears, the Patient Record will be updated if the EMR can provide any updates to the MotionMD Patient Record. In this example, the Patient's name was updated in the EMR to AB Test 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**.
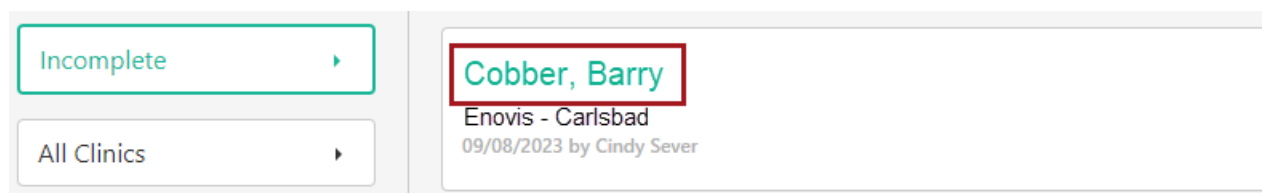
To update a manually created patient with information from the EMR, first ensure the Patient Record includes the MRN .

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.
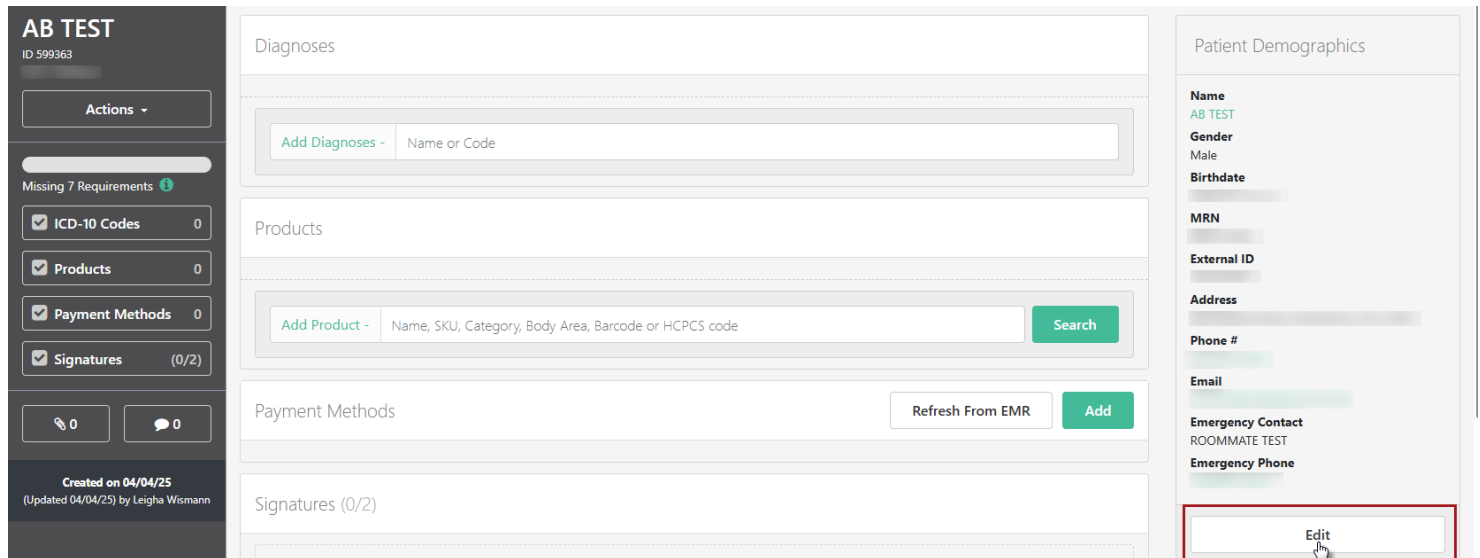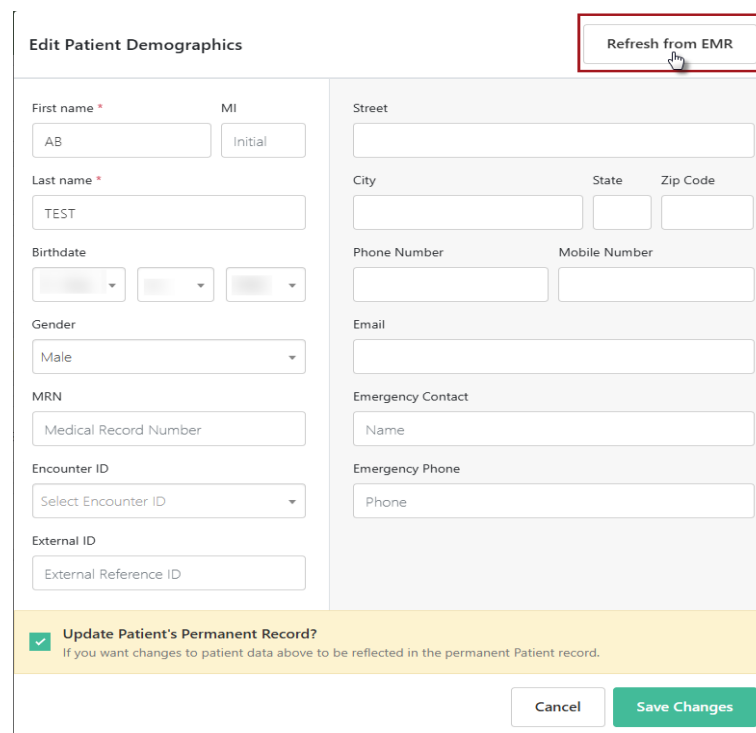
Search EMR Feature

Patient Demographics Section Refresh From EMR (Continued)

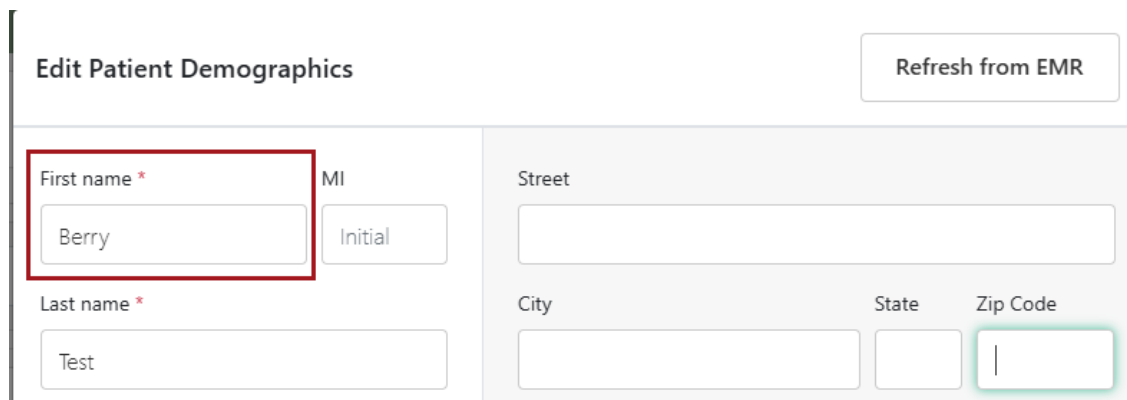On the **PA page**, click the **Edit** button in the **Patient Demographics** section.

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

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.

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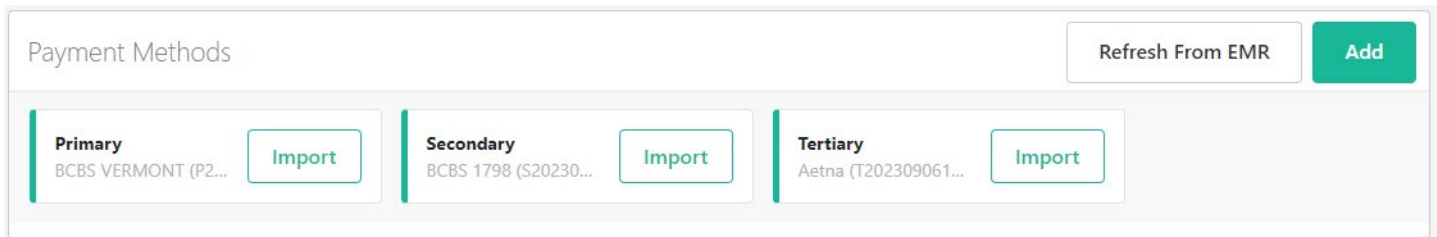
In this example, the patient states they have new insurance that is not Aetna.

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.