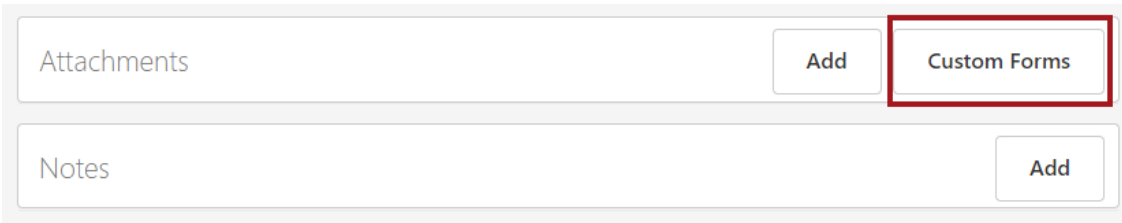


ADDING A CUSTOM FORM TO A PATIENT AGREEMENT

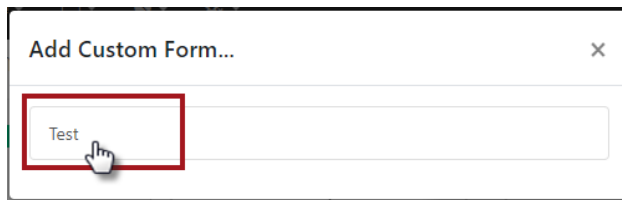
The ability to create and add a Custom Form is a new tier feature available in MotionMD for customers on the Pro tier. Once enabled, a user can select and add a Custom Form to a Patient Agreement (PA). The steps below outline how to add a Custom Form.

Select the **Custom Forms** button under the Attachments section.



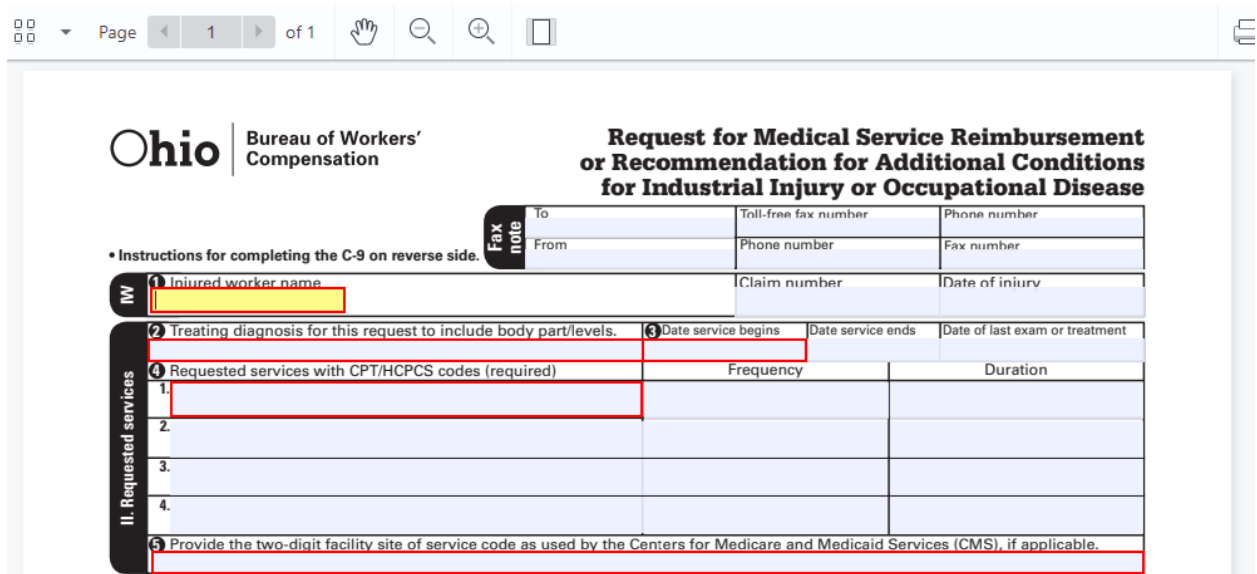
The screenshot shows a user interface with two main sections: 'Attachments' and 'Notes'. In the 'Attachments' section, there are three buttons: 'Add', 'Custom Forms', and another 'Add' button. The 'Custom Forms' button is highlighted with a red rectangular box. Below the 'Attachments' section is the 'Notes' section, which also has an 'Add' button.

A display modal will appear providing a list of all custom form options. Select the custom form to complete.



The screenshot shows a modal window titled 'Add Custom Form...'. Inside the modal, there is a list of custom form options. The first option, 'Test', is highlighted with a red rectangular box, and a mouse cursor is pointing at it.

The Custom Form will open in a modal. If the form has required data fields, those fields will be highlighted in **RED** for the user to complete.



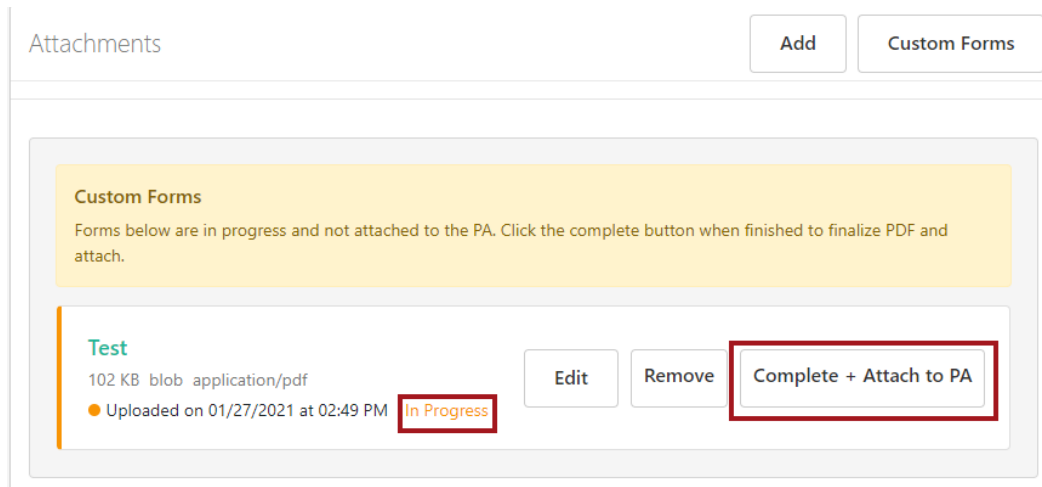
The screenshot shows a form titled 'Request for Medical Service Reimbursement or Recommendation for Additional Conditions for Industrial Injury or Occupational Disease'. The form is displayed in a modal window. The form includes a header with the Ohio Bureau of Workers' Compensation logo and title. Below the header, there are several sections for providing information. The 'II. Requested services' section is highlighted with a red box, and the 'Requested services' table is also highlighted with a red box. The table has columns for 'Requested services with CPT/HCPCS codes (required)', 'Frequency', and 'Duration'. The 'Requested services' section is highlighted with a red box, and the 'Requested services' table is also highlighted with a red box. The 'Requested services' section is highlighted with a red box, and the 'Requested services' table is also highlighted with a red box.

Requested services		Frequency	Duration
1.			
2.			
3.			
4.			

ADDING A CUSTOM FORM TO A PATIENT AGREEMENT

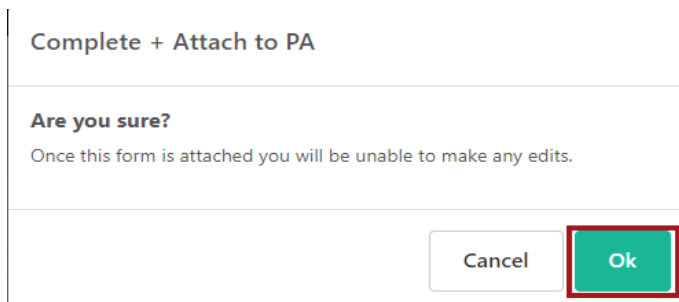
The Custom Form will show as **In Progress** status under the Attachments section. The form can be Edited and Saved as many times as needed until complete. Once the form is determined to be complete:

Select **Complete + Attach to PA** to finalize the Custom Form.



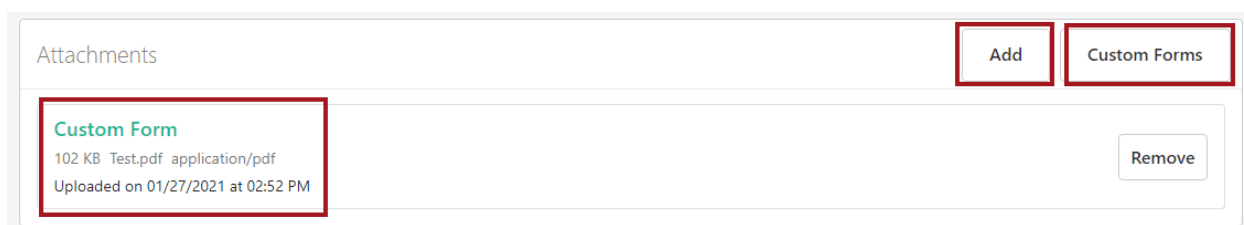
The screenshot shows the 'Attachments' section with two buttons: 'Add' and 'Custom Forms'. Below these is a yellow box titled 'Custom Forms' with the text: 'Forms below are in progress and not attached to the PA. Click the complete button when finished to finalize PDF and attach.' Below this is a list item for a file named 'Test' (102 KB, blob, application/pdf). It shows a status of 'In Progress' and three buttons: 'Edit', 'Remove', and 'Complete + Attach to PA'. The 'Complete + Attach to PA' button is highlighted with a red box.

A modal will display asking to confirm the upload by selecting the **Ok** button. Selecting **Cancel** keeps the Custom Form in the **In Progress** status.



The screenshot shows a modal titled 'Complete + Attach to PA'. It contains the text 'Are you sure?' and a warning: 'Once this form is attached you will be unable to make any edits.' At the bottom are two buttons: 'Cancel' and 'Ok'. The 'Ok' button is highlighted with a red box.

The Custom Form has been successfully attached when the document displays as **Uploaded with the Date/Time Stamp**. Select the **Add** button to add any other additional attachments or the Custom Forms button to start a new Custom Form.



The screenshot shows the 'Attachments' section with two buttons: 'Add' and 'Custom Forms'. Below these is a list item for a file named 'Custom Form' (102 KB, Test.pdf, application/pdf). It shows a status of 'Uploaded on 01/27/2021 at 02:52 PM' and a 'Remove' button. The entire list item is highlighted with a red box.