

# NEW PA GUIDE



MOTIONMD Clinical Inventory HCPCS Codes Reports Admin Help

## CSA Orthopedics

Patient Agreements Restock Status Billing Analytics Motion Intelligence

Search All Patient Agreements... PA List **New Patient Agreement**

To start a NEW Patient Agreement from the Main Dashboard select:  
The + Tab in the upper right corner and select Patient agreement OR  
New Patient Agreement button on the main search bar

Validate the Account selected  
To update account, go to the person icon in the upper right corner and change account

## New Patient Agreement

CSA Orthopedics OfficeCare

Set Clinic Location \*  
PA will be created for this location

CSA Orthopedics (Main)

Set Clinic location depending on where you are dispensing product from if not defaulted

Provider Select a Provider Start typing in Provider Name and select. This is not a mandatory field and may be chosen within the PA page

Protocol Do not use Protocol Use Protocol

Patient \* Find a Patient Create a New Patient

Search for a Patient using name or MRN... Search Type in a Patient Name or MRN and search

Select a patient from the results below:

Test Patient [1966-10-16]

Test Testerson [1995-06-13]

Click on the patient that is receiving the product

If a patient agreement has been created for this patient in the last 90 days you'll see this message with the total quantity

Select View existing PA to view, as needed

Patient Agreement Already Exists  
Found 1 recently created Patient Agreement for Test Patient.

View existing PA

Patient \*

Find a Patient **Create a New Patient**

Select Create New Patient when a patient does not appear to select under Find a patient

Add First Name, Last Name, DOB, MRN and Email address

Create Patient

First name\*

Middle Initial

Last name\*

Gender

Birthdate\*  Month  Day  Year

MRN

Email

You will be able to add additional patient information at a later time.

**Create Patient**

Validate that agreement is created under the correct inventory location

PA will be created at CSA Orthopedics (Main) **OfficeCare** for Test Patient

Create Patient Agreement

**Create Patient Agreement**

### Test Patient

The user is redirected to the patient agreement to complete

Archive View Activity Print

ID 107183 - CSA Orthopedics (Main)  
Created on 04/07/20 (Updated 04/07/20) by Kristen DiRocco

5 Requirements for Billing

Remaining Requirements needed to complete claim for billing. It will turn green once all are met

Patient Demographics		Edit
Name	Test Patient	
Birthdate	1966-10-16	
Address	123 Vista Way, Vista, CA 92081	

Medical Information		Edit
Provider	Don Joy	
NPI	1023296035	
Order Date		
Injury Date		
Surgery Date		

### Diagnoses

Add Diagnosis Code: Start typing in code and select correct option once it appears to populate ICD-10

Add Diagnoses - M17.11

M17.11 Unilateral primary osteoarthritis, right knee

ICD-10 ICD-9 x

# NEW PA GUIDE

Products

**Add Product - 11-0215** **Search**

Displaying results that match "11-0215" [Clear Search](#)

**In Stock (1)** Custom Products (0) Rental Products (0) Full Catalog

**Add Product:** Start typing the SKU, Barcode, or Product Name and select Search.  
The Search will display products in Stock. To search all products, select Full Catalog.

<p><b>Reaction Knee Brace</b> DJO - Donjoy • Knee • OTS Splinting Global</p>	<p>11-0215-2 Size XS/S <span style="background-color: red; color: white; padding: 2px;">0 - CSA Orthopedics (Main)</span></p> <p>Qty <input type="text" value="1"/> <span style="float: right;"><b>Select</b></span></p>
	<p>11-0215-3 Size M/L <span style="background-color: green; color: white; padding: 2px;">5 - CSA Orthopedics (Main)</span></p> <p>Qty <input type="text" value="1"/> <span style="float: right;"><b>Select</b></span></p>
	<p>11-0215-4 Size XL/XXL <span style="background-color: green; color: white; padding: 2px;">2 - CSA Orthopedics (Main)</span></p> <p>Qty <input type="text" value="1"/> <span style="float: right;"><b>Select</b></span></p>

Red indicates no stock on hand  
Green indicates stock on hand

Select Size

Reaction Knee Brace - 11-0215-3

**Fulfill From** Stock

**Inventory Location** CSA Orthopedics (Main)

**Billing Channel** OfficeCare

**Involved Side** Left Right Bilateral (Not side specific) N/A

**Serial #** Not Required

**Self Pay/TOS** No Yes

The product will default to Fulfill from Stock  
Select Involved Side  
Save Changes

**Save Changes** Cancel

Payment Methods **Add Payment Method:**

<p><b>Primary</b> Medicare (Medicare)</p> <p style="text-align: right;"><span style="border: 1px solid green; padding: 2px;">Import</span></p>	<p><b>Secondary</b> BC/BS of MA (Com...</p> <p style="text-align: right;"><span style="border: 1px solid green; padding: 2px;">Import</span></p>	<p><b>Tertiary</b> Hurt at Work Comp ...</p> <p style="text-align: right;"><span style="border: 1px solid green; padding: 2px;">Import</span></p>	<p><b>Add</b></p>
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An integrated account is able to import insurance information onto the PA by selecting the Import Buttons for each Payment method listed

A non-integrated account is able to manually add and select the payment method by using the Add button



# NEW PA GUIDE



Signature

Reset Signature

Cancel

Save Signature

After the patient accepts terms, this box will appear to capture patient's signature.

If needed, the patient may use reset signature to clear signature if a mistake is made

Once signature is complete, Save Signature

X.  
Test Patient(Self)