MOTIONMD®

This document is designed to support the users and teams utilizing the MotionMD Analytics feature. This is a detailed analysis of the functionality of MotionMD Analytics as well as a Dashboard overview.

1.0 Analytics Dashboard Objective

The objective of the Analytics Dashboard and reports is to provide users with an overview of how a specific account, providers and locations are currently performing and have historically performed. The reports also allow the user to highlight efficiencies or inefficiencies in operations and drill into detailed breakdowns for any Provider, Location, Product or Clinic to further understand any areas of improvement. Aside from performance, the reports also provide a current quarter to date look at Inventory metrics for all Inventory Locations in an account.

2.0 Account Overview Dashboard

The Overview Dashboard is the default opening view. This dashboard contains several Account level KPI's as well as Net Income broken out by Clinic, Provider and Quarter.

| Overview | Provider | Inventory | VeriPro | Scheduler |

| Date Range | Start Date | End Date | Average Collection Rate | |
| This Quarter ▼ | 📅 07/01/2025 | 📅 09/30/2025 | 100% ▼ | Update Charts |

This Dashboard features the following filtering options for the user:

Date Range*	Data is defaulted to This Quarter. The data can be filtered to All Dates or any Custom Date range
Average Collection Rate*	Filter the Avg. Collection Rate that is applied to bill charge amount for a product dispensed. Ranges from 100% - 0% in increments of 5% and is defaulted to 100%
Update Charts	After setting a filter, the Update Charts button will enable and turn green. Click the button to update the data on the tables and graphs on the page

*These filters will be applied to the Provider Dashboard tab when set on the Overview tab

2.1 Metrics Header

This section displays several Account level KPI's. Including: Total Billed Charge, Total Unit Cost and Total Net Income. Values for these KPI's will update based on the Date Range and Average Collection Rate selected.
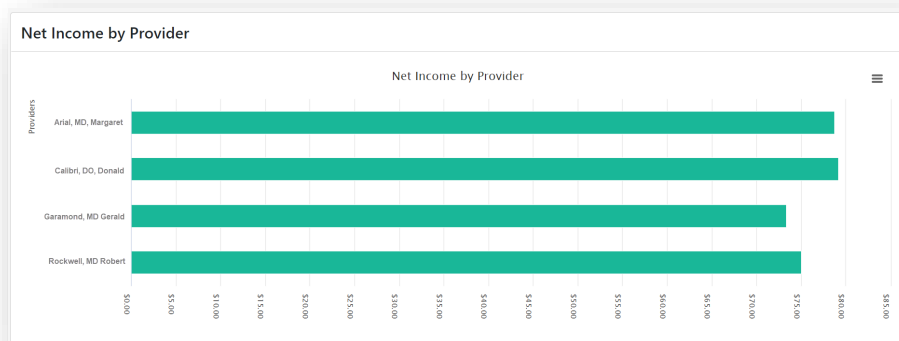

The metrics used on the Metrics Header are listed and explained below:

Metric	Description
Total Billed Charge	Sum of Billed Charges for all Products Dispensed and all Providers
Total Unit Price	Sum of the Unit Price for all Products Dispensed and all Providers
Total Net Income	Sum of Net Income for all Products Dispensed and all Providers. (Net income is calculated by subtracting the Unit Price from the Average Collection Rate amount)

2.2 Net Income by Provider Graph

This graph breaks out Net Income by all Providers in the Account and is sorted in alphabetical order displaying the Net Income value along the bottom.

2.2 Net Income by Provider Graph (Continued)

Drilldown: Hover over bar graph to see Provider Name and total Net Income value
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV

The metrics used on this graph are explained and listed below:

Metric	Description
Net Income	Total Net Income per products being dispensed for the Provider in $
Provider	Last Name, First Name

2.3 Net Income by Provider Table

This table breaks out Net Income related measures by all Providers and is default sorted in alphabetical order by Provider with totals at the bottom.

Net Income by Provider

Download CSV

Provider	Bill Charge	Avg. Collection Rate	Unit Price	Net Income (Avg Collection Rate - Unit Price)	Units Dispensed	Net Income (per product dispensed)
Cox, Bobby	$640.00	$512.00	$145.00	$396.00	3	$132.00
Drake, John	$320.00	$256.00	$80.00	$192.00	1	$192.00
	$960.00	$768.00	$225.00	$588.00	4	$324.00

Drilldown: Clicking on a Provider's name will take the user to the Provider tab with all data filtered to that Provider
Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order
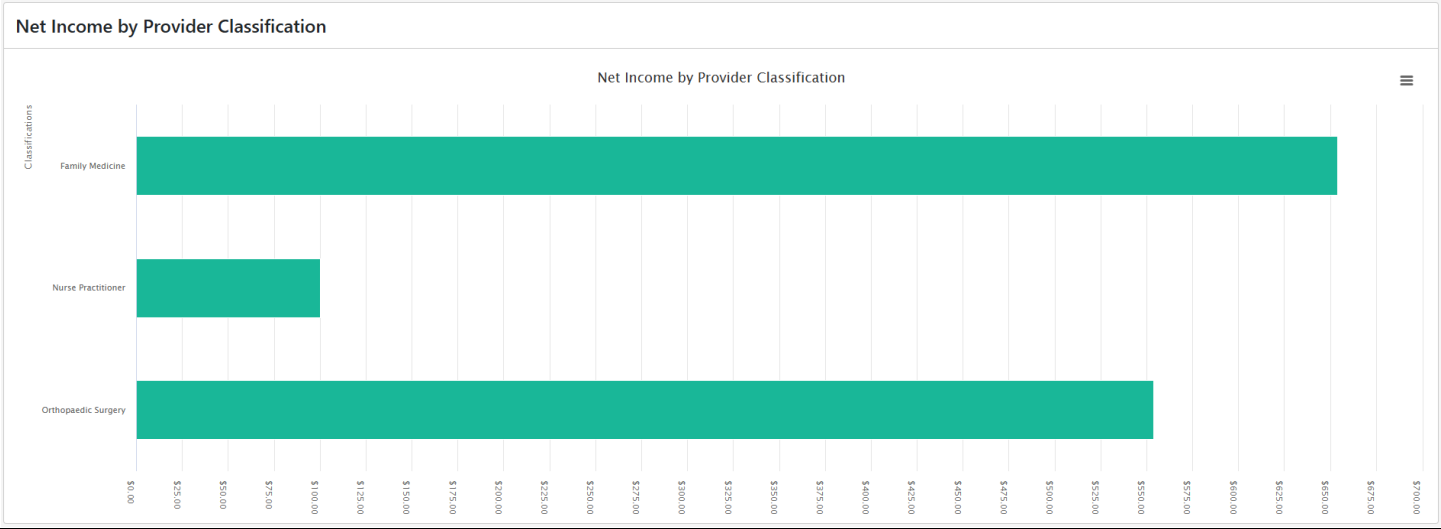**Download:** All data shown on the table, depending on Date and Average Collection filters, can be downloaded to CSV by clicking the Download CSV button
The metrics used on this table are listed and explained below:

Metric	Description
Provider	Last Name, First Name
Bill Charge	Sum of product Bill Charges for all products dispensed
Avg. Collection Rate	Sum of Bill Charges based on the applied Avg. Collection Rate % in $
Unit Price	Sum of Unit Price of products dispensed in $
Net Income	Total Net Income for the Provider based on products dispensed (Avg. Collection Rate – Unit Price)
Units Dispensed	Count of products dispensed
Net Income per Product Dispensed	Average Net Income per dispensed product in $

2.4 Net Income by Provider Classification

This graph shows the grouping of providers by the higher-level Classification rather than Specializtion to compare different groups of providers.
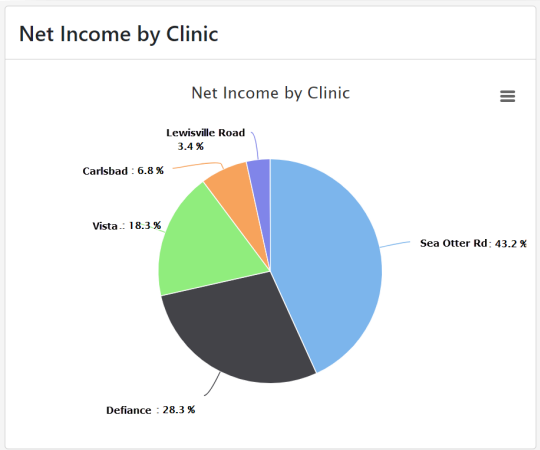

Drilldown: Hover over bar graph to see Provider Name and total Net Income value per Product Dispensed
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Net Income	Sum of Net Income by Provider per Product Dispensed
Classification	NPI Classification grouping

2.5 Net Income by Clinic

This graph breaks out Net Income by all Clinics in the Account and is sorted in descending order, displaying the value at the top of each bar.

2.5 Net Income by Clinic (Continued)

Drilldown: Hover over pie graph to see Clinic and total Net Income value
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Net Income	Sum of Net Income for the Clinic in $
Clinic	Clinic Name

2.6 Net Income by Payment Method

This graph breaks out the Net Income by Payment Methods of Medicare, Medicaid, Commercial, Work Comp, Auto and Self Pay to understand at a high-level which Payment Methods make up what percent of billed claims.

Drilldown: Hover over pie graph to see Clinic and total Net Income value
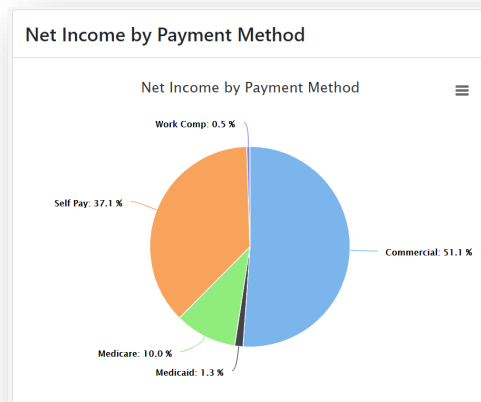**Download:** Click on the Menu icon to open the graph on full screen, download the image or the data in XLS

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Net Income	Sum of Net Income for the Clinic in $
Payment Method	Higher level payor type added to claims

2.7 Product and HCPCS Analysis

This table breaks out Net Income related measures and calculations by all Products dispensed and is sorted in alphabetical order and rolled up by Product with totals at the bottom.

Drilldown: Use arrow next to each product to open and view all SKUs dispensed by line item or click the Expand All button to open each product row
Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order
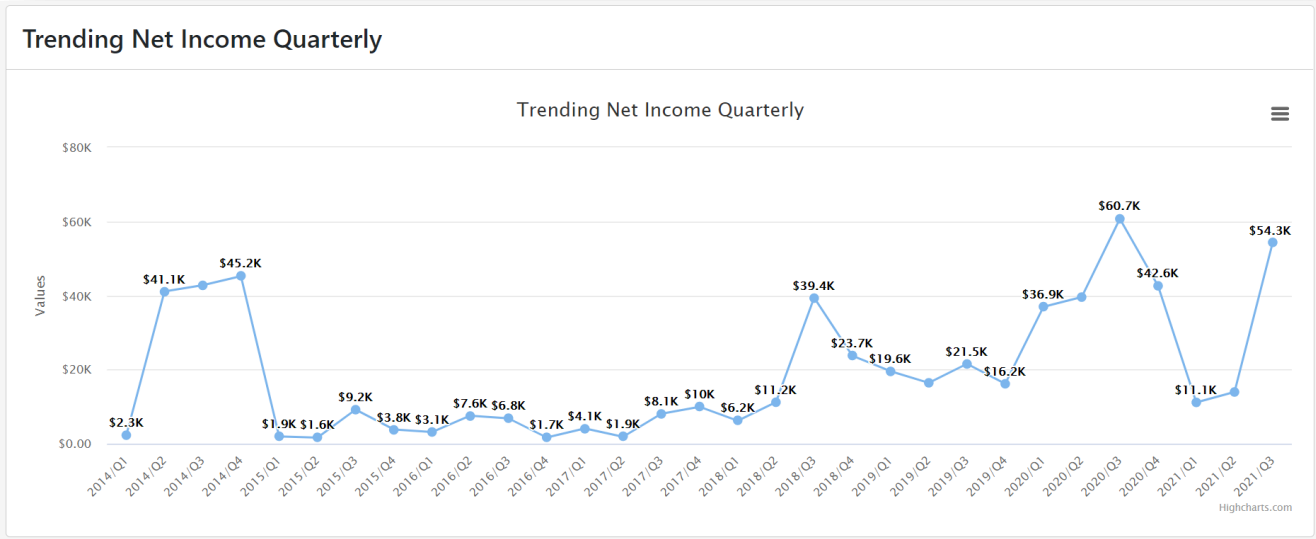**Download:** All data shown on the table, depending on Date and Average Collection filters, can be downloaded to CSV by clicking the Download CSV button

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Product Name	List of Product dispensed
SKU & HCPCS	Expanding Product will reveal each SKU dispensed and corresponding HCPCS
Bill Charge	Sum of charged amount for Products dispensed with Avg. Collection Rate % in $
Unit Price	Sum of Unit Price of Products dispensed in $
Net Income	Total Net Income for the Products in $
Units Dispensed	Count of products dispensed

2.8 Trending Net Income Quarterly

This graph displays Net Income by Quarter for all time. Changing the Average Collection Rate filter will update data on the graph.

Drilldown: Hover over points on the graph to see the total Net Income value
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in XLS or CSV

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Net Income	Total Net Income for the Quarter and Year in $

3.0 Provider Dashboard

The Provider dashboard can be reached by clicking on the Provider tab or by clicking into any of the Provider names from the Net Income by Provider table on the Overview tab. This dashboard contains several Provider level KPI's as well as Net Income broken out by Product, HCPCS Code & Quarter. The data seen on the Provider tab breakdown is the same as seen on the Overview Dashboard, but specifically the Provider(s) selected. The Provider tab can also be filtered by Provider Classification and will filter to one or many classifications. If the Provider or Classification filters are set, the filter will be maintained on the Overview tab.

3.0 Provider Dashboard (Continued)

This Dashboard features the following filtering options for the user:

Date Range*	Data is defaulted to This Quarter. The data can be filtered to All Dates or any Custom Date Ranges
Average Collection Rate*	Filter the Avg. Collection Rate that is applied to bill charge amount for a product dispensed. Ranges from 100% - 0% in increments of 5% and is defaulted to 100%
Provider	Provider tab will show all Providers until provider(s) are selected.
Provider Classification	NPI Classification grouping

*If these filters were set on the Overview tab, they persist onto the Provider tab

3.1 Metrics Header

The Metrics section at the top of the Dashboard is defaulted to all Providers or selected Provider(s) that the user is viewing as well as a three high-level KPI's. This includes Total Billed Charge, Total Unit Price and Total Net Income. This data will update depending on the filters set at the top of the tab.

3.1 Metrics Header (Continued)

The metrics used on the Metrics Header are listed and explained below:

Metric	Description
Total Billed Charge	Sum of Billed Charges for all Products Dispensed and all Providers selected
Total Unit Price	Sum of the Unit Price for all Products Dispensed and all Providers selected
Total Net Income	Sum of Net Income for all Products Dispensed and all Providers selected. (Net income is calculated by subtracting the Unit Price from the Average Collection Rate amount)

3.2 Net Income by Provider Table

This table breaks out Net Income related measures and calculations by the Providers selected and is sorted in alphabetical order by Provider with totals at the bottom.

Net Income by Provider   Download CSV

Provider	Bill Charge	Avg. Collection Rate	Unit Price	Net Income (Avg Collection Rate - Unit Price)	Units Dispensed	Net Income (per product dispensed)
Cox, Bobby	$640.00	$512.00	$145.00	$396.00	3	$132.00
Drake, John	$320.00	$256.00	$80.00	$192.00	1	$192.00
	$960.00	$768.00	$225.00	$588.00	4	$324.00

Drilldown: Clicking on a Provider's name will take the user to the Provider tab with all data filtered to that Provider
Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order
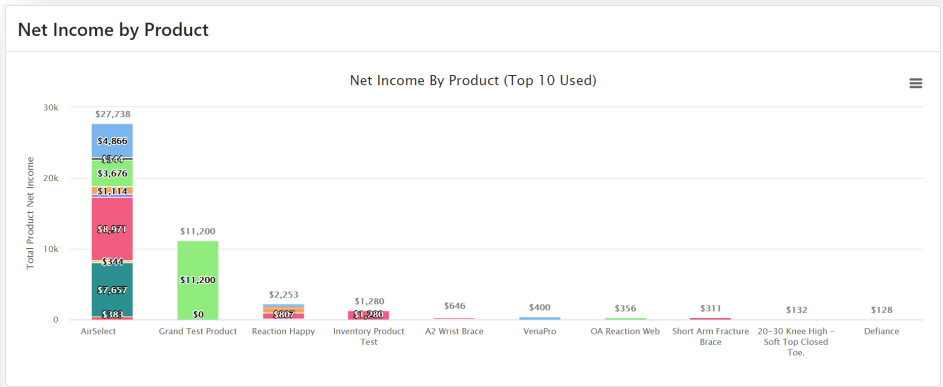**Download:** All data shown on the table, depending on Date and Average Collection filters, can be downloaded to CSV by clicking the Download CSV button

The metrics used on this table are listed and explained below:

Metric	Description
Provider	Last Name, First Name
Bill Charge	Sum of product Bill Charges for all products dispensed
Avg. Collection Rate	Sum of Bill Charges based on the applied Avg. Collection Rate % in $
Unit Price	Sum of Unit Price of products dispensed in $
Units Dispensed	Count of products dispensed
Net Income	Total Net Income for the Provider per products dispensed

3.3 Net Income by Product

This table breaks out Net Income by the top 10 Products dispensed. To see Net Income for all products, download the CSV.

Drilldown: Hover over bar graph to see Product, Provider, Net Income by Provider and Total Net Income for all Providers
Download: Click on the Menu icon to open the graph on full screen, download the image or all data in CSV

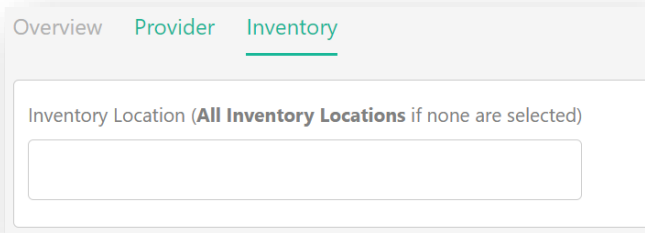The metrics used on this table are listed and explained below:

Metric	Description
Total Product Net Income	Total Net Income of Products dispensed per Provider

3.4 Net Income by Clinic or Payment Method, Product & HCPCS Analysis & Trending Net Income by Quarter

The remaining tables and graphs on the Provider tab match the tables and graphs from the Overview tab, but drill down by the Provider(s) selected.

4.0 Inventory Dashboard

The Inventory Dashboard contains several Account level Inventory KPIs. This includes Total Inventory Value, Inventory Valuation by Inventory Location, Inventory Quantity, Average Product Cost and Total Product Cost broken down out by Location and Product.
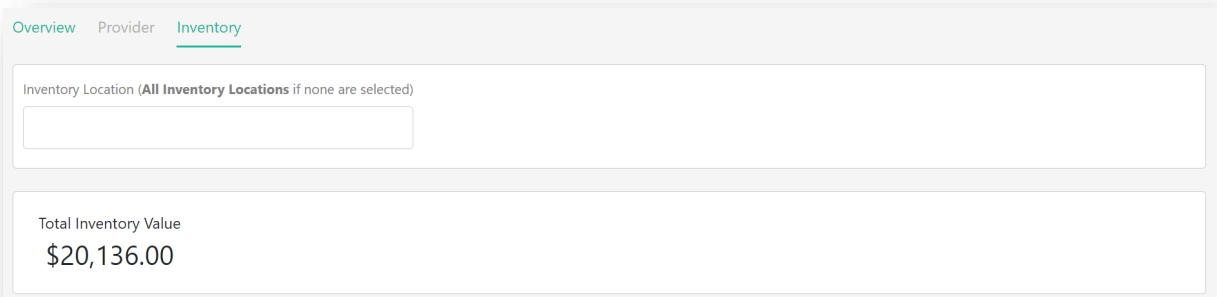

This Dashboard features the following filtering options for the user:

Location	Filter data to specific Inventory Location or multiple Inventory Locations. Defaulted to All Inventory Locations

4.1 Metrics Header

The section at the top of the Dashboard displays the Total Inventory Valuation for all Inventory Locations. The Inventory Valuation is derived from the Product Unit Price multiplied by the total number of current SKUs On-hand for all Inventory Locations.
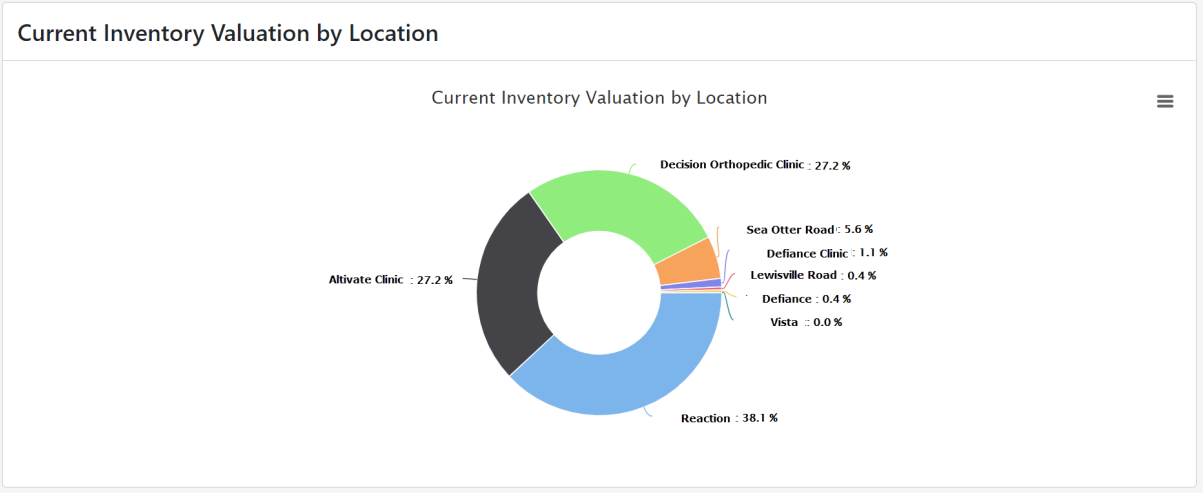

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Total Inventory Valuation	Sum of Inventory Quantities multiplied by Unit Price in $

4.2 Current Inventory Valuation by Location

This graph breaks out Inventory Valuation by all Inventory Locations in the Account and show the percent each Inventory Location contributes to the value of all stocked inventory.
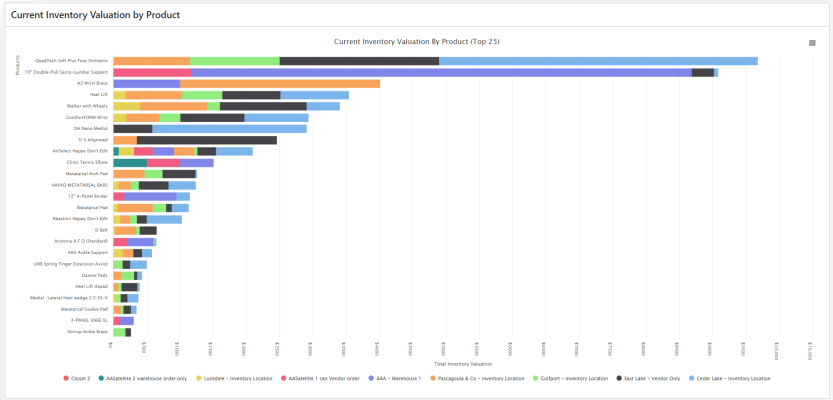

Drilldown: Hover over pie graph to see Inventory Location, the Inventory Valuation in dollars and percent contribution.
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV.

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Total Inventory Valuation	Sum of Inventory Quantities multiplied by Unit Price in $
Location	Name of Location

4.3 Current Inventory Valuation by Product

This graph breaks out Inventory Valuation by the top 25 Products and Locations in the Account and is sorted in descending order. To see the entire list of inventory items, download the CSV.

4.3 Current Inventory Valuation by Product (Continued)

Drilldown: Hover over pie graph to see Inventory Location, the Inventory Valuation in dollars and percent contribution.
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV.

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Total Inventory Valuation	Sum of Inventory Quantities multiplied by Unit Price in $
Location	Name of Inventory Location
Product	Name of Product (includes all SKUs tied to Product)

4.4 Current Inventory Analysis by Product

This table breaks out Product by Inventory Location, Quantity on Hand, Unit Price and Total Value. The user also can expand any product row or all product rows to show a breakdown of all associated locations.

Drilldown: Use arrow next to each product to view all Inventory Locations with stock or click the Expand All button to open each product row
Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order
Download: All data shown on the table can be downloaded to CSV by clicking the Download CSV button

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Product	Name of Product (includes all SKUs tied to Product)
Location	Name of Inventory Location
Quantity on Hand	Count of Products On-Hand
Unit Price	Average Cost per Product in $
Total Value	Sum of Inventory Quantities multiplied by Unit Price in $

5.0 VeriPro Dashboard

The VeriPro dashboard contains several KPI's related to VeriPro verifications, and the Estimated Patient Responsibility (EPR) provided when VeriPro is utilized. These include EPR by VeriPro Payor, EPR by Provider, EPR by Clinic location and Trending EPR Quarterly. The data on this dashboard can be filtered by date range and providers. **NOTE:** the VeriPro dashboard tab is only visible if the VeriPro module is enabled for the account.

5.1 Metrics Header

The section at the top of the Dashboard displays the Total Billed Charges for all Clinic Locations, the Total EPR Quoted, the Total Number of VeriPro PAs (regardless of the status of the PA), Average EPR and lastly the Percent of PAs verified which is calculated by comparing a subset of all PAs created versus the number of PAs with a VeriPro verification.

Total Billed Charges	Total EPR Quoted	Total Number of VeriPro PA's	Average EPR	Percent of PA's Verified
$13,464.63	$3,129.68	27	$115.91	24.11%

Metric	Description
Total Billed Charge	Sum of Billed Charges for all PAs with a VeriPro verification for selected date range
Total EPR Quoted	Sum of the EPR for all PAs with a VeriPro verification and an EPR for selected date range
Total Number of VeriPro PAs	Sum of PAs with a VeriPro verification for selected date range regardless of the PAs status
Average EPR	Total EPR Quoted divided by the Total Number of VeriPro PAs
Percent of PAs Verified	Total Number of VeriPro PAs divided by the Total Number of PAs with or without a VeriPro verification and with only Commercial or Medicare Payment methods

5.2 EPR by VeriPro Payor

The EPR by VeriPro Payor table utilizes the payor selected when completing a VeriPro verification rather than the Payment Method payor name. As well as the number of PAs verified for the specific payor, Billed Charges and VeriPro EPR.

Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order.
Download: All data shown on the table can be downloaded to CSV by clicking the Download CSV button.

The metrics used on this Dashboard are explained and listed below:

Metric	Description
VeriPro Payor	Payor name selected when completing a verification
Number of PAs	Total number of PAs with a verification for each specific payor
Bill Charge	Sum of product Bill Charges for products with a verification
VeriPro EPR	Estimated Patient Responsibility totaled for each specific payor

5.3 EPR by Provider

This table breaks down the VeriPro EPR by providers depending on date range and providers selected in the filter.
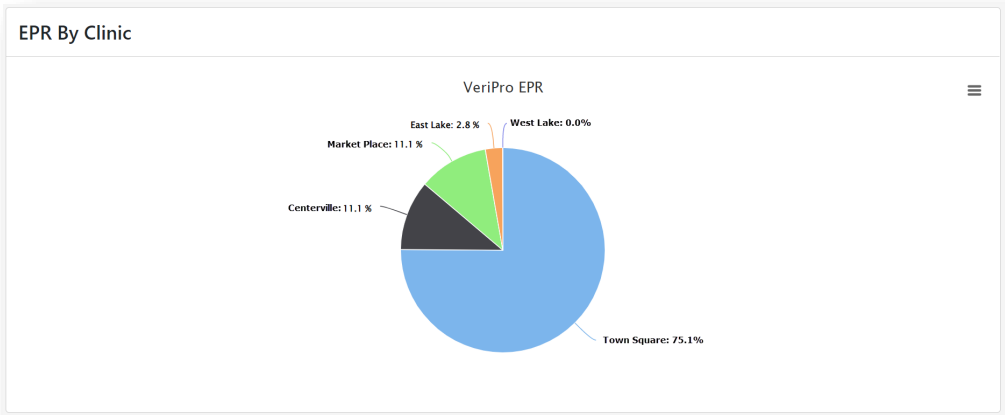
5.3 EPR by Provider (Continued)

Sorting: Arrows within the table header can be clicked to sort the table data in ascending or descending order.
Download: All data shown on the table can be downloaded to CSV by clicking the Download CSV button.

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Provider Name	Name of Provider tied to the PA with a verification
Number of PAs	Total number of PAs with a verification for each specific provider
Bill Charge	Sum of product Bill Charges for products with a verification
VeriPro EPR	Estimated Patient Responsibility totaled for each specific provider

5.4 EPR by Clinic

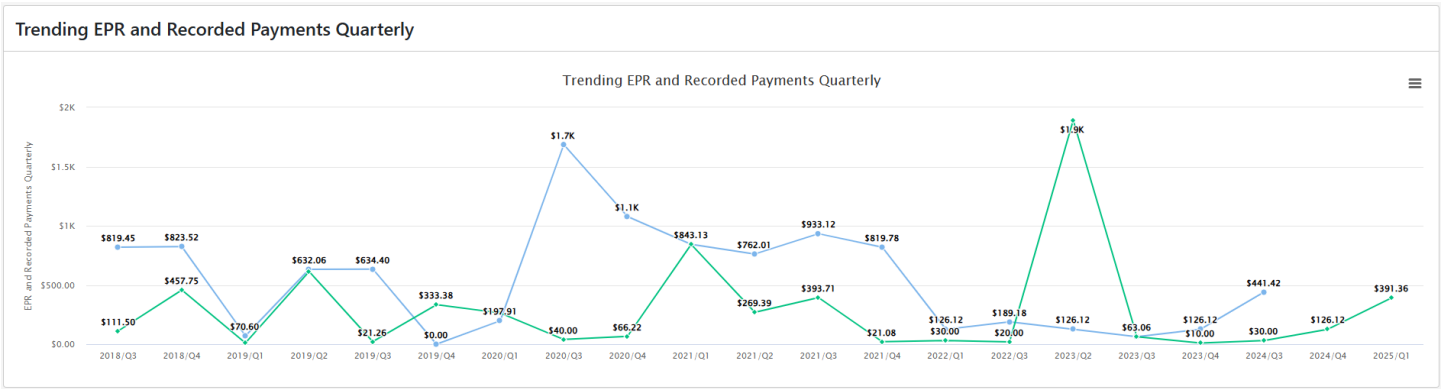This graph shows the percentage of EPR by each Clinic Location.

Drilldown: Hovering over each section of the graph will show the Clinic Location, total dollar amount of the EPR and Percent of EPR.
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in CSV.

The metrics used on this Dashboard are explained and listed below:

Metric	Description
Clinic Location	Name of clinic the PA was verified under
Percent EPR	Percent of verifications completed by specific clinic
EPR Total	Total dollar amount of EPR by specific clinic, shown on hover

5.5 Trending EPR and Recorded Payments Quarterly

This graph displays EPR by Quarter for all time in Blue and Recorded Payments in Green.

Drilldown: Hover over points on the graph to see the total EPR value
Download: Click on the Menu icon to open the graph on full screen, download the image or the data in or CSV

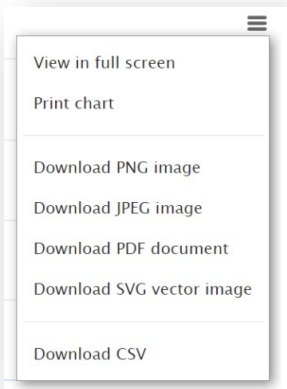The metrics used on this Dashboard are explained and listed below:

Metric	Description
EPR	Total EPR for the Quarter in $
Recorded Payments	Calculates the total EPR when the Recorded Payments button is selected

6.0 Helpful Information

There are additional actions Users can take to manage the tables, graphs and data. These actions can be found on the Menu option in the upper right corner of the table or graph. Section 3 reviews the calculations behind the tables and graphs.

6.1 Table and Graph Menu

The Menu option in the top right corner of tables and graphs provides the user with additional functionality in the form of raw data exports for additional analysis and images for reporting.

6.2 Menu Actions

View in full screen: This opens the table or graph into full screen image. Click Esc key to exit out of full screen view.
Print Chart: Opens graph image in Print screen. Not available on all tables or graphs.
Download PNG image: Downloads the table or graph as a PNG file.
Download JPEG image: Downloads the table or graph as JPEG file.
Download PDF document: Downloads the table or graph as PDF file.
Download SVG vector image: Downloads the table or graph as SVG vector file.
Download CSV: Downloads the data from the table or behind the graph into CSV file. Use when additional data analysis will be done.

6.3 Report Calculations

The following list includes all formulas used in the report and how they are calculated:

Metric	Calculation
Net Income	(Avg. Collection Rate % x Bill Charge) – Inventory Item Unit Price
Net Income per Product Dispensed	Net Income / Units Dispensed
Inventory Valuation	Quantity On-hand x Inventory Item Unit Price
Bill Charge	Amount billed to payor (Under Pricing in MotionMD as Bill Charge)
Inventory Unit Price	Price set on each SKU and is the price the SKU is purchased from the Vendor
Units Dispensed	Count of Inventory Items dispensed on a Patient Agreement. To be considered in this data the PA must be Ready for Billing or Billed (also includes Archived PAs in either status). Products on Incomplete PAs are not considered
Quantity on Hand	Current On-hand quantity of SKU + Outstanding Restocks