

MOTIONMD® REPORTS

The new **Reports** dashboard page will replace the current Reports list providing a consolidated and updated look and allows the user to easily pin their favorite reports for quick and easy access! Under the **Reports** tab, reports seen in the dropdown list depend on the role(s) of the user or if specific account features have been enabled.

Reports

Generate Reports Pinned Reports (0)

Select a report

Administrative

- Follow Up Status
- PA Status Report
- Providers List
- Provider Usage
- Rental Cycle Summary
- User List
- VeriPro
- Self Pay Recorded Payments

Inventory

- Audit Reconciliation
- Inventory Shrink
- Inventory Value
- Outstanding Restock Orders
- Product Activity
- Product Report
- Product Usage (Batch)
- Purchase Order History
- Rental Status Report
- Stock On Hand Adjustment History
- Stock Par Level Adjustment History
- Stock Record Report
- Transfer History
- Unit Price Adjustment History

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Administrative Section	
Report Name	Report Details
Follow Up Status	<p>Summary report of all PAs in For Follow Up Status. Report includes Account, Clinic, PA Number, MRN, Diagnosis Code, Product(s), HCPCS, Provider First/Last Name, PA Created Date/Time, Created by First/Last Name, Payor(s), Follow Up Reason(s), Follow Up Requested by First/Last Name, Follow Up Requested Date/Time</p> <p>Filters: By date, all locations or individual location, and all follow up reasons or individual reason.</p> <p>Important Note: Will only display in the Reports section if the account has Follow-Up turned on.</p> <p>Roles: Admin, Billing, Clinical Coordinator, Clinical Specialist, Inventory Admin, Key Account Rep</p>
PA Status Report	<p>Summary report of all PAs in For Follow Up, Incomplete, Ready for Billing, or Submitted status.</p> <p>Filters: By date and all locations or individual location along with PA status. May choose to include individual product lines, date range based on PA, and to include archived PAs.</p> <p>Important Note: The Custom Range date filter can only be set to a 1 Year range due to amount of data on report. The system will give you an error message if date range selected exceeds 1 year.</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Key Account Rep, Protocol Creator</p>
Providers List	<p>Summary report of medical providers. Report includes MotionMD Provider ID, NPI Number, Provider's First/Middle/Last Name, Suffix, and Taxonomy.</p> <p>Filters: None, automatic download</p> <p>Roles: Admin, Inventory Admin</p>
Provider Usage	<p>Summary report of units dispensed by provider. Report includes Provider Name, Sum of Billed Charge, Sum of Unit Price, Gross Revenue, Total Units Dispensed, and Product Mix. The Sum of Billed Charge is the sum of all units dispensed on PAs. The formula for Gross Revenue is the Sum of Unit Price subtracted from Sum of Billed Charges.</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin</p>

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Administrative Section Cont.	
Report Name	
Rental Cycle Summary	<p>Summary report of all rental items dispensed. Report includes Inventory Location/Clinic, PA Number, MRN, Serial Number, Rental Product, SKU, Date and Time of Check Out, Rental Period, Rental Due Date and Time, Check Out by First/Last Name, Patient First/Last Name, Patient Phone Number, Patient Address Information, and Notes.</p> <p>Uses: Report can be used to view a specific rental product's detail and the patient it was dispensed to</p> <p>Filters: By date and all locations or individual location</p>
User List	<p>Summary list of all users in the account and their statuses. Report includes First/Last Name, Email, Current Clinic Location, Default Clinic Location, User Status, Last Login Date and Time, Time Zone, SSO Identity Provider, and Role(s).</p> <p>Use: Report can be used to see which staff member has a user account, what location their defaulted, their status, and roles assigned.</p> <p>Filters: None, automatic download</p> <p>Roles: Admin</p>
VeriPro	<p>Summary report of all PAs with a VeriPro verification. Report includes Estimated Patient Responsibility (EPR), Payment Amount, Payor, Payment Memo, Notes and if PA was Archived and Archive Reasons.</p> <p>Uses: Report can be used to determine the amount collected vs. EPR at time of dispense and missed opportunity to collect</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin</p>
Same or Similar	<p>Summary report of all Same or Similar checks completed. Report includes Account, Clinic, PA Number, MRN, Product, HCPCS, PA Created Date/Time, Created by First/Last Name, Payor(s), Same or Similar Status, ABN Attached, and if PA was Archived and Archive information.</p> <p>Uses: Report can be used to view all Medicare orders to determine if a Same or Similar check was completed or ABN completed.</p> <p>Filters: By date and all locations or individual location</p> <p>Important Note: Will only display in the Reports section if the account has Same or Similar turned on.</p> <p>Roles: Admin</p>

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Self-Pay Recorded Payments	Summary report of all PAs with self-pay payments were recorded. Report includes Product, Total Billed Charge, Self-Pay Price, and Payment Amount. Uses: Report can be used to determine the amount collected via self-pay payments at time of dispense. Filters: By date Roles: Admin
Inventory Location Directory	List of all Inventory Locations under an account along with their Account Numbers and Addresses. Uses: Report can be used to display all inventory locations details under one account all at one time. Filters: N/A Roles: Admin and Inventory Admin
Inventory Section	
Report Name	Report Details
Audit Reconciliation	Report shows all Patient Agreements completed but not submitted to billing. Uses: Reconciliation of inventory during an audit Filters: By date and all locations or individual location Roles: Admin, Clinical Coordinator, Clinical Specialist, Inventory Admin, Key Account Rep, Protocol Creator, PSR
Inventory Shrink	Report shows all inventory counts completed by Inventory Location, each counted SKU, quantity counted and the status of the Count Uses: Analyzing inventory shrink after an Inventory Count has been completed and applied. Shows previous on-hand quantities and variances after a new Count has been completed and applied Filters: By date and all locations or individual location Roles: Admin, Collector, Inventory Admin, Inventory Counts

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Inventory Section Cont.	
Report Name	Report Details
Inventory Value	<p>Report shows on-hand inventory and the value of the inventory in each inventory location. The formula for the Total Cost column is the Product Cost (Value) multiplied by the quantity currently on-hand. It does not take into account any items not fulfilled on a PA or any items on a Restock Order</p> <p>Use: For estimating the value of all on-hand inventory (accounting)</p> <p>Filters: By all locations or individual location and total inventory value count</p> <p>Roles: Admin, Inventory Admin</p>
Outstanding Restock Orders	<p>Report shows all Open Restock Orders. Report includes Restock Order Number, Inventory Location, Restock Creation Date, Open Item SKU/Size, quantity Ordered/Checked In/Outstanding, and quantities Cancelled.</p> <p>Use: Validation that orders to vendors are accurately fulfilled and all product ordered has been received</p> <p>Filters: By older than 30 days or custom date range and all locations or individual location</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Inventory Admin, Key Account Rep, Protocol Creator, PSR</p>
Product Activity	<p>Report shows summaries by month(s) any item placed on a PA and fulfilled (decremented from stock). Report includes SKU, Manufacturer, HCPCS, Product name, Unit Price, Total units for timeframe, total Extended Price for timeframe, and Total Units/Extended Price by month. Any PA not signed by a patient is not included. Manual inventory adjustments are not accounted for on this report</p> <p>Filters: By date, all locations or individual location, and individual inventory location lines</p> <p>Note: When using the All Dates filter the report pulls back all items dispensed in that month regardless of year</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Key Account Rep, Protocol Creator, PSR</p>

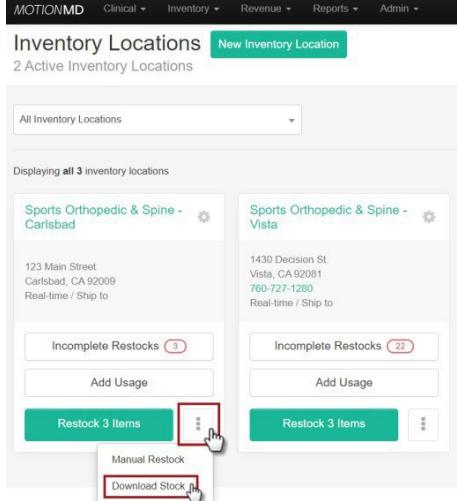
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Inventory Section Cont.	
Report Name	Report Details
Product Report	<p>Report shows a comprehensive overview of all products loaded in an account and representing all inventory in all locations. Only Global products with stock records will show and all products created at the account level, with or without stock records, will be listed. Report shows all details that have been applied to a specific Product including Vendor, Vendor Site, Unit Price, Unit of Measure, HCPCS (and whether it is a Global HCPCS or one set at the Biller level), Inventory Value (Cost), Billed Charge, Patient Pay Price (calculated).</p> <p>Use: Allows review of data tied to the product and update or add as needed</p> <p>Filters: None, automatic download</p> <p>Roles: Admin, Inventory Admin</p>
Product Usage (Batch)	<p>Report shows all manually created inventory Usage uploads by Inventory Location, SKU, Provider, Notes and date. Provider can be added to each SKU if needed to link usage of that item to a specific Provider. Provider and Notes are optional fields</p> <p>Use: Usage report shows any inventory item that was dispensed or used outside of a Patient Agreement so Inventory decrements can be tracked and reconciled</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin, Inventory Admin, Inventory Usage</p>
Purchase Order History	<p>Historical data of all Restock Orders (POs) created by Inventory Location, Ship to Account Number, and Item, including the quantity ordered and the Unit Price. The formula for the Extended Price column is the Unit Price (Purchase Price) multiplied by the quantity of units ordered.</p> <p>Use: Reconciling invoicing with orders created</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Inventory Admin, Protocol Creator, PSR</p>
Rental Status Report	<p>A summary report that shows the status for each rental product that is in the inventory. Report includes the Rental Product, Serial Number, SKU, Product Active and Current Status.</p> <p>Use: A comprehensive report of all rental items and their statuses</p> <p>Filters: By inventory location or all locations</p> <p>Roles: Admin, Billing, Clinical Coordinator, Clinical Specialist, Collector, Inventory</p>

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Inventory Section Cont.	
Report Name	Report Details
Stock On Hand Adjustment History	<p>Summary list of changes made to stock on-hand counts by inventory location and SKU. Increments and decrements will tally under Adjustment Amount. Reasons for each adjustment on the stock record are listed along with User and dates</p> <p>Use: After inventory counts and subsequent inventory stock record adjustments to show inventory shrink for a given location</p> <p>Filters: By date and all locations or individual location</p> <p>Note: Adjustment details shown on report will change based on the date filter</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Key Account Rep, Protocol Creator, PSR</p>
Stock Par level Adjustment History	<p>Summary list of changes made to Par level by inventory location and SKU. Increments and decrements will tally under Adjustment Amount. Reasons for each adjustment on the stock record are listed along with User and dates</p> <p>Use: After inventory counts and subsequent inventory stock record adjustments to show inventory shrink or increase for a given location</p> <p>Filters: By date and all locations or individual location</p> <p>Note: Adjustment details shown on report will change based on the date filter</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Key Account Rep, Protocol Creator, PSR</p>
Stock Record Report	<p>List of all Stock Records by Inventory Location. It includes Vendor, Unit Price, Unit of Measure, Vendor SKU, Par, On-hand quantities, Outstanding Restock quantity, total number of units dispensed in last 90 days, Dead Stock and Excess Stock</p> <p>Use: Audit reconciliation, par level adjustments, reducing inventory</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Key Account Rep, PSR</p>
Transfer History	<p>Summary of inventory transfers from one Inventory Location to another and includes the date of transfer, SKUs and sizes transferred, total quantity of each SKU transferred, Unit Price and Extended Price</p> <p>Use: Tracking transfers of inventory from one location to another</p> <p>Filters: By date and all locations or individual location</p> <p>Roles: Admin, Clinical Coordinator, Clinical Specialist, Inventory Admin, Key Account Rep, Protocol Creator, PSR</p>

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Inventory Section Cont.	
Report Name	Report Details
Unit Price Adjustment History	<p>Summary list of changes made to the Unit Price by inventory location and SKU. Report will show the Previous and New Unit Price, Adjustment Reason, User and Date.</p> <p>Use: Track purchase price updates</p> <p>Filter: By date</p> <p>Roles: Admin</p>
Stock by Inventory Location	
Report Name	Report Details
Stock Report by Inventory Location	 <p>This report is found on the Inventory Locations page and the link to download the report is found within the menu at the bottom right on the Inventory Location card (see image above). Click the Menu button then click Download Stock</p> <p>The report will list all Items by SKU where a stock record has been created. The report shows the Par Level, the current Stock Count (or On-hand), Quantity Acknowledged (are items on a Restock Order that have not been checked in), Quantity En-route (column not used) and Quantity Needed are items waiting to be ordered</p> <p>Note: This report is not as comprehensive as the Inventory Report</p> <p>Use: Utilized for Inventory Audits to validate on-hand levels</p> <p>Filters: None, automatic download</p>