

MOTIONMD CHART NOTES WORKFLOW

1. Introduction

MotionMD supports an API-based integration with Epic and other leading EMRs/EHRs, enabling clinicians to retrieve finalized **Chart Notes** directly into the patient agreement workflow. This feature improves documentation completeness, reduces manual effort, and supports faster, more accurate claim documents.

2. Key Benefits

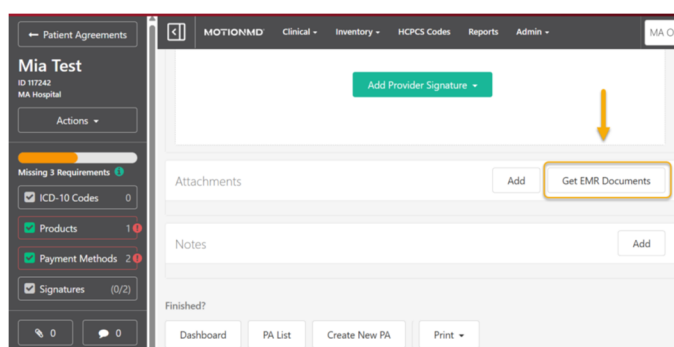
The Chart Notes workflow enhances the overall user experience.

1. **More complete patient data from the start** — **MotionMD** retrieves demographics, insurance, and finalized chart notes directly from the EMR/EHR, providing clinicians more comprehensive information.
2. **Access to chart notes in Final or Amended status** — Only clinically validated notes are pulled into **MotionMD**, ensuring accuracy and reducing the risk of using draft or incomplete documentation.
3. **Scalable, future-ready integration using API/FHIR** — Modern interoperability standards support flexible deployment across Epic, Athena, and upcoming EMRs/EHRs, allowing organizations to evolve their integration over time.
4. **Time savings** — Early feedback shows ~1 minute saved per PA, equating to 30–60 minutes saved per day, driven by reduced manual document retrieval and fewer workflow interruptions.

3. Locating the “Get EMR Documents” Button

3.1 The Get EMR Documents button is located in the Attachments section of the Patient Agreement.

When this feature is enabled, the button will appear to the right of the **Add** button in the **Attachments** section of the Patient Agreement (PA). Scroll to the **Attachments** section and click on **Get EMR Documents**.



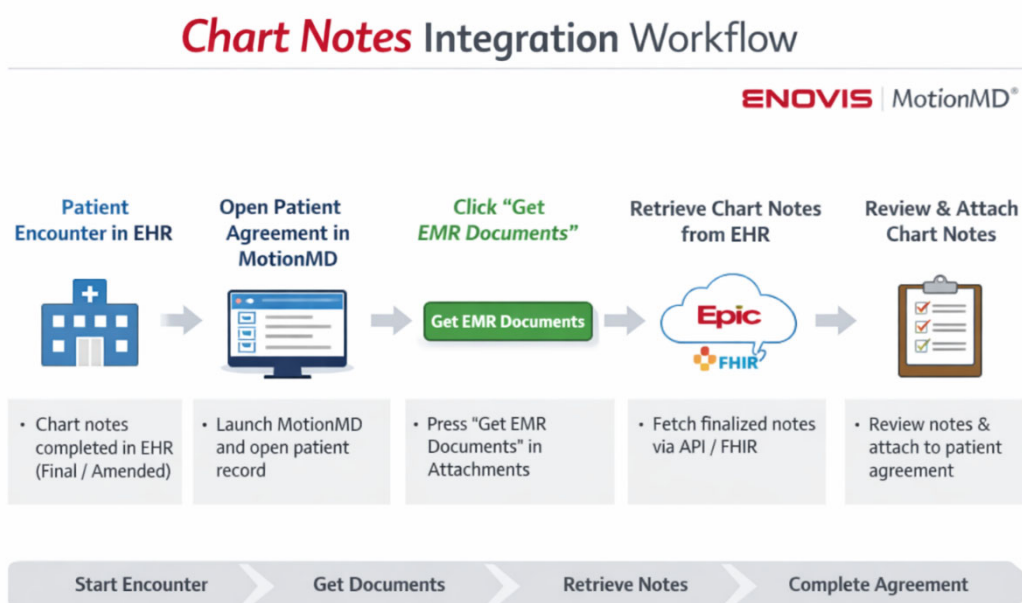
3.2 Chart Notes Functionality

When the user suspects there are chart notes needed for the Patient Agreement, they will click the **Get EMR Documents** button. MotionMD retrieves chart notes that meet the following criteria:

- **Status** — Only notes in Final or Amended state
- **Encounter Filter** — Retrieval is based on the Order Date
- **Document Types** — Progress notes, clinical notes, and other finalized encounter documentation
- **User Review Required** — Users should remove any unnecessary files after retrieval

Supported EMRs:

- AthenaHealth
- Epic



3.3 Chart Note Format

Below is a sample of an expected **Chart Note** format.

Included elements may include:

- **Patient identifiers** — MRN, Name, DOB
- **Encounter details** — Visit type, class, period, reason
- **Diagnoses/Conditions** — Including ICD-10 codes
- **Clinical Note metadata** — Author, category, status, signer, custodian, document ID
- **Note content** — Chief complaint, assessment, plan, and other clinical details

Patient Name

MRN:

Patient Name

DOB:

Report Date: 2026-05-29 15:55

MRN:

(NPI:)
)
)

Sports
 Medicine & Podiatry - Lexington (NPI:)
 Orthopedic Surgery

Encounter Information (ID:)

Type: Office Visit (ARRIVED)
 Class: Appointment
 Service Type:
 Period: 2026-05-27 07:00 PM to 2026-05-27 07:15 PM
 Reason(s): Pre-op Visit
 Participants:

Diagnoses / Conditions

Degenerative superior labral anterior-to-posterior (SLAP) tear of right shoulder

Status: Active (Confirmed)

Onset Date: 2026-05-08

ICD-10: S43.431A - Superior glenoid labrum lesion of right shoulder, initial encounter

Rotator cuff tendinitis, right

Status: Active (Confirmed)

Onset Date: 2026-04-20

ICD-10: M75.81 - Other shoulder lesions, right shoulder

Notes

Author:	Category: Clinical Note	Date:	2026-05-29 02:24 PM
Status: FINAL	Signer:	Role: Signer	Encounter: Office Visit (ID:)
	Time: 2026-05-29T14:27:46Z		
Setting: Orthopedic Surgery	Custodian:)	Doc ID:	)

Patient ID:

DOB:

MRN:

Chief Complaint

4. Glossary

- **HL7:** Healthcare data exchange standard.
- **API:** Application Programming Interface.
- **FHIR:** Fast Healthcare Interoperability Resources; a modern standard for structuring and sharing healthcare data.
- **Order Date:** The date patient is seen and used to filter which chart notes are retrieved from the EMR/EHR.
- **Patient Agreement (PA):** The MotionMD record used to manage patient care, product selection, and documentation.
- **Get EMR Documents Button:** The action button in the Attachments section that retrieves

chart notes from the EMR/EHR.

- **Final/Amended Status:** Indicates that a chart note has been reviewed and signed off by the provider; only these are imported.

5. Troubleshooting and Support

5.1 “Get EMR Documents” button is missing.

If the button does not appear in the Attachments section:

- Confirm Chart Notes Integration is enabled for your account.
- Verify the user has the correct MotionMD role permissions.
- Check whether the EMR/EHR (Epic, Athena) is fully activated for chart note retrieval.
- Ensure the patient agreement is associated with a valid encounter.

5.2 No Chart Notes retrieved

If clicking **Get EMR Documents** returns no files:

- Confirm the chart note is in **Final** or **Amended** status in the EMR/EHR system. Draft notes are not retrieved.
- Check the **Order Date** — only notes tied to the encounter’s order date are eligible.

5.3 Incorrect Chart Notes appear

If the wrong documents are retrieved:

- Review the Patient Agreement order date to ensure the correct visit is selected.
- Confirm the provider finalized the correct note in the EMR/EHR.
- Remove any unnecessary files from the Attachments section.
- Check whether multiple encounters share similar timestamps or visit types.

5.4 Chart Notes fail to attach to the PA

If retrieved notes do not attach:

- Refresh the Patient Agreement and retry the attachment.
- Ensure the file type is supported (PDF only).
- Confirm the user has permission to modify attachments.
- Check for network connectivity issues that may interrupt the upload.

5.5 EMR/EHR connection errors

If **MotionMD** cannot connect to the EMR/EHR:

- Verify VPN or secure tunnel connectivity.
- Confirm API/FHIR endpoints are reachable.
- Check whether the EMR/EHR team recently changed firewall rules or certificates.
- Ask IT to confirm that the integration engine (Cloverleaf, Mirth, Rhapsody) is running.

5.6 Slow retrieval or timeout

If chart notes take longer than expected to load:

- Check for high network latency or VPN congestion.
- Confirm the EMR/EHR is not experiencing performance issues.
- Retry during off-peak hours to rule out load-related delays.
- Ask IT to review interface engine logs for bottlenecks.

5.7 Duplicate Chart Note retrieved

If multiple copies of the same note appear:

- Confirm whether the provider amended the note multiple times.
- Check the EMR/EHR if multiple encounters share the same order date.
- Remove duplicates manually from the Attachments section.

Please contact **MotionMD** Support if issues affect multiple PAs or appear system-wide to investigate further if needed.