

OVERVIEW OF PROTOCOLS

MotionMD® has a protocol library which lists suggested protocols and protocols that are specific to a provider. Users can access the Protocol Library to create a new protocol, copy an existing protocol and review any notes associated with a protocol. Suggested protocols have “Suggested” after the indication and are highlighted in Blue. For protocols specific to providers, the protocol name will include the indication and the provider’s name.

This document provides guidance on the each of the following components related to protocols:

1. **Creating a New Protocol**
2. **Build and Modifying a Protocol**
3. **Customize an existing Suggested Protocol**
4. **Approval and Activating a Protocol**
5. **Inactivating a Protocol**

1. Creating a New Protocol:

On the main dashboard, select **Clinical > Protocols > New Protocol**



The **Protocol** window will open to add details to create the protocol:

- **Indication** - select the from the drop-down menu
- **Provider** - select provider name from the drop-down menu
- **Name** – the protocol name will auto-generate based on the Indication and Provider selected
- **Treatment Approach**- select the drop-down menu.

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Once complete, **Create Protocol**.

Protocol
New

Indication	Select Indication	<input type="button" value=""/>
Diagnoses		
Provider	Select a Provider	<input type="button" value=""/>
* Name		
Treatment approach	Select Treatment	<input type="button" value=""/>
Considerations/Questions		
<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 5px; width: 100px; height: 30px; border-radius: 5px; text-decoration: none; font-weight: bold; margin: 10px 0;" type="button" value="Create Protocol"/> <input style="border: 1px solid #0070C0; padding: 5px; width: 100px; height: 30px; border-radius: 5px; text-decoration: none; font-weight: bold; margin: 10px 0;" type="button" value="Cancel"/>		

2. Build and Modify a Protocol

Protocols can be built by selecting Actions to add and complete each section. Users can edit a protocol with the same process. **Once an edit is made the protocol will become inactive until the provider signs off on the changes.** NOTE: The ability to Edit is limited based on user role assigned.

Active

Achilles Rupture / Doctor Abductor - Operative

Actions

Update Protocol Requires Provider Approval
By editing, the protocol will become inactive until the provider signs off on the changes.

Details

Provider
Don Joy

Indication
Achilles Rupture

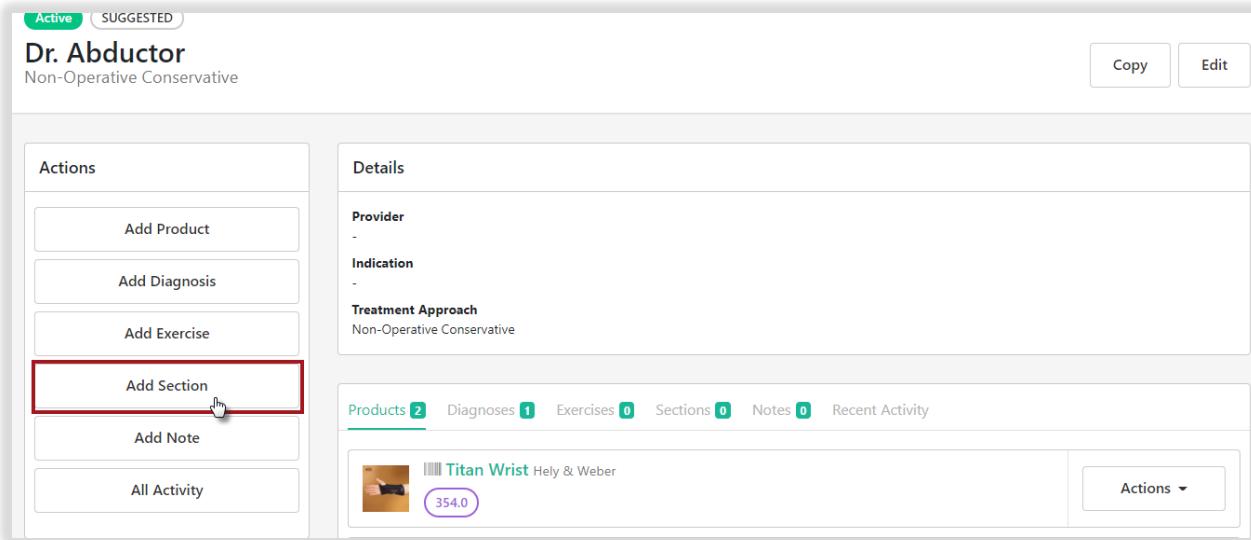
Treatment Approach
Operative

Products **Diagnoses** **Exercises** **Sections** **Notes** **Recent Activity** **Approval**

 MaxTrax Air Walker Boot DIO - Donjoy M67.01 M67.02 M76.6	<input type="button" value="Actions"/>
 Crutches Medline M67.01 M67.02 M76.6	<input type="button" value="Actions"/>
 IceMan CLEAR3 DIO - Aircast Patient Pay Only M67.01 M67.02 M76.6	<input type="button" value="Actions"/>

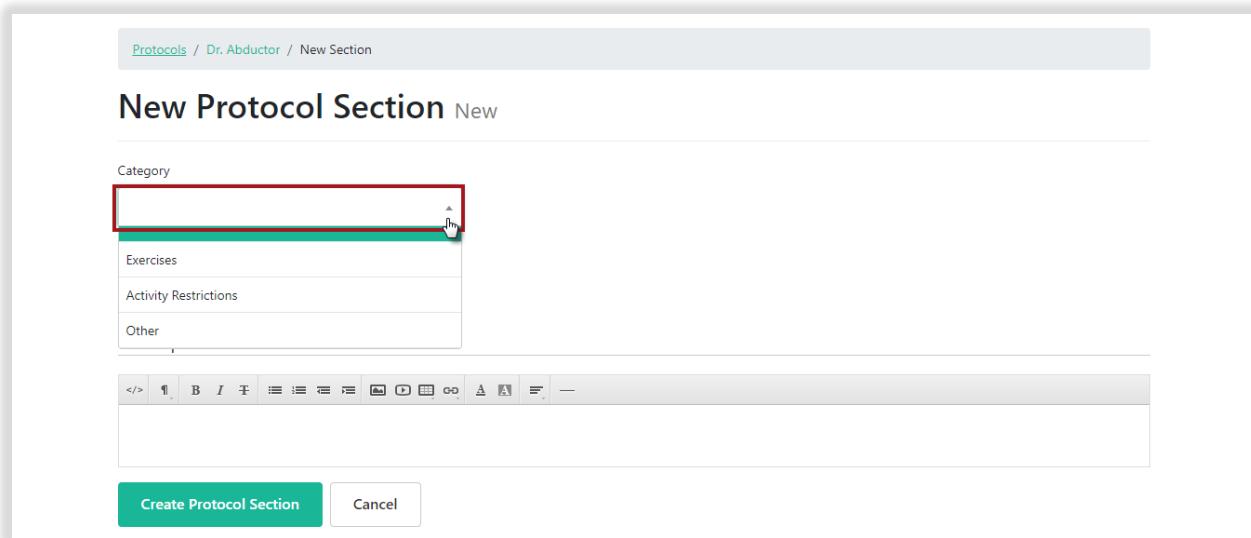
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If there is an exercise not listed in the drop-down menu or add Activity Restrictions, a user may do so by selecting the Add Section tab.



The screenshot shows the 'Dr. Abductor' protocol details page. The 'Actions' sidebar on the left includes buttons for 'Add Product', 'Add Diagnosis', 'Add Exercise', 'Add Section' (which is highlighted with a red box and a cursor icon), 'Add Note', and 'All Activity'. The 'Details' section on the right shows 'Provider' (empty), 'Indication' (empty), and 'Treatment Approach' (Non-Operative Conservative). Below the details is a navigation bar with links for Products (2), Diagnoses (1), Exercises (0), Sections (0), Notes (0), and Recent Activity. A product card for 'Titan Wrist' is listed, showing an image of a hand, the name 'Titan Wrist', the author 'Hely & Weber', and the price '354.0'.

That will open the New Protocol Section, where a user can select a category, choose from the drop-down menu, and customize it to their desire.

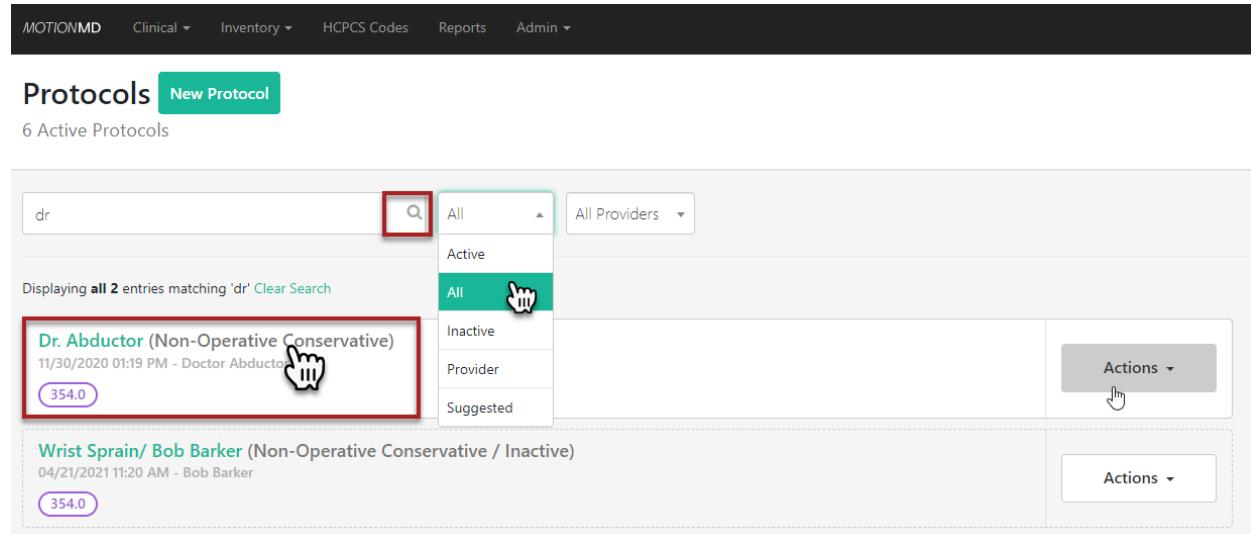


The screenshot shows the 'New Protocol Section' dialog box. The 'Category' dropdown menu is open, showing options: Exercises, Activity Restrictions, and Other. The 'Create Protocol Section' button is at the bottom left, and the 'Cancel' button is at the bottom right. The dialog box has a title 'New Protocol Section' and a 'New' indicator. The background shows a navigation bar with 'Protocols / Dr. Abductor / New Section'.

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3. Customize an existing Suggested Protocol:

Users may elect to customize a suggested protocol (highlighted in blue) or an existing provider protocol by utilizing the Copy feature. Under protocols, search and select the desired protocol.



MOTIONMD Clinical ▾ Inventory ▾ HCPCS Codes Reports Admin ▾

Protocols New Protocol

6 Active Protocols

dr

Displaying all 2 entries matching 'dr' [Clear Search](#)

Dr. Abductor (Non-Operative Conservative) [Actions](#)

1/30/2020 01:19 PM - Doctor Abductor

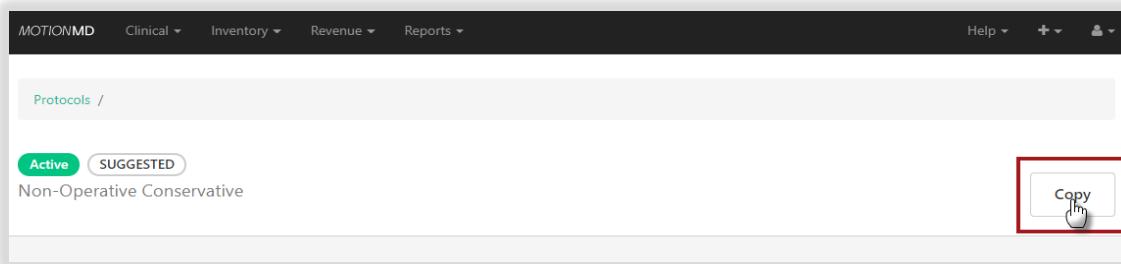
354.0

Wrist Sprain/ Bob Barker (Non-Operative Conservative / Inactive) [Actions](#)

04/21/2021 11:20 AM - Bob Barker

354.0

Select **Copy** and a pop-up box will appear to update the provider and protocol name.



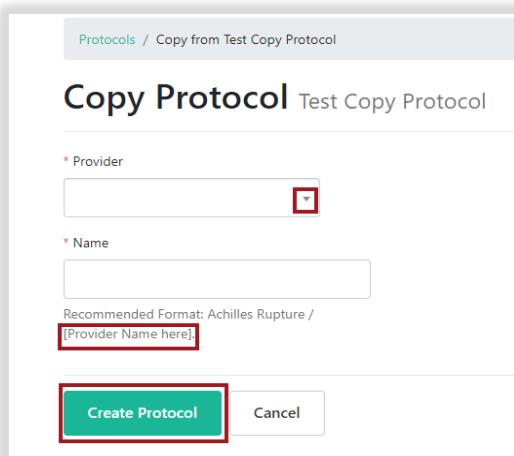
MOTIONMD Clinical ▾ Inventory ▾ Revenue ▾ Reports ▾ Help ▾

Protocols /

Active **SUGGESTED**

Non-Operative Conservative

Copy



Protocols / Copy from Test Copy Protocol

Copy Protocol Test Copy Protocol

* Provider

* Name

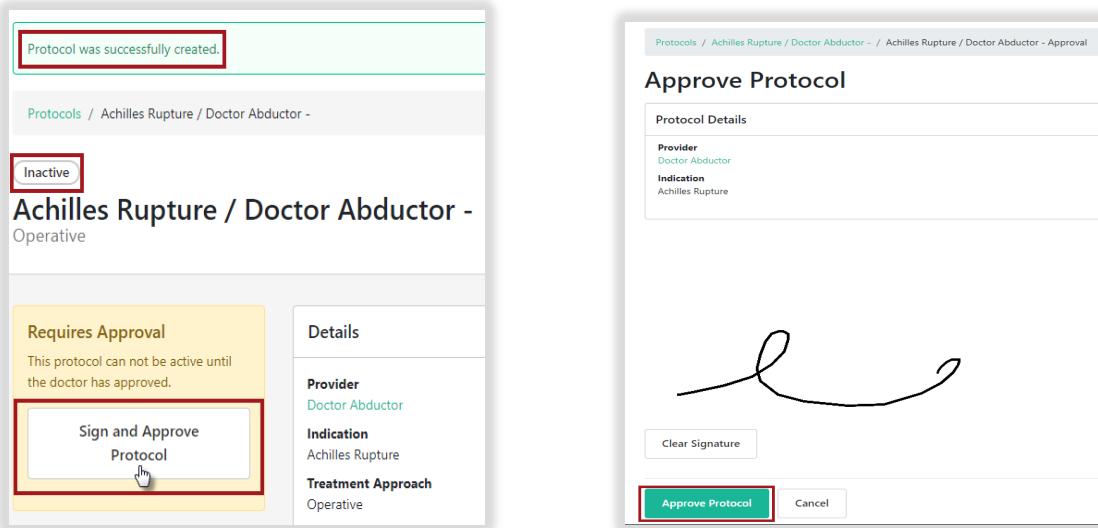
Recommended Format: Achilles Rupture / [Provider Name here]

Create Protocol **Cancel**

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4 . Approval and Activating a Protocol

Once the Protocol is successfully created it will remain inactive pending approval and provider signature to activate.



Protocol was successfully created.

Protocols / Achilles Rupture / Doctor Abductor -

Inactive

Achilles Rupture / Doctor Abductor -
Operative

Requires Approval
This protocol can not be active until the doctor has approved.

Sign and Approve
Protocol

Details

Provider
Doctor Abductor

Indication
Achilles Rupture

Treatment Approach
Operative

Approve Protocol

Protocol Details

Provider
Doctor Abductor

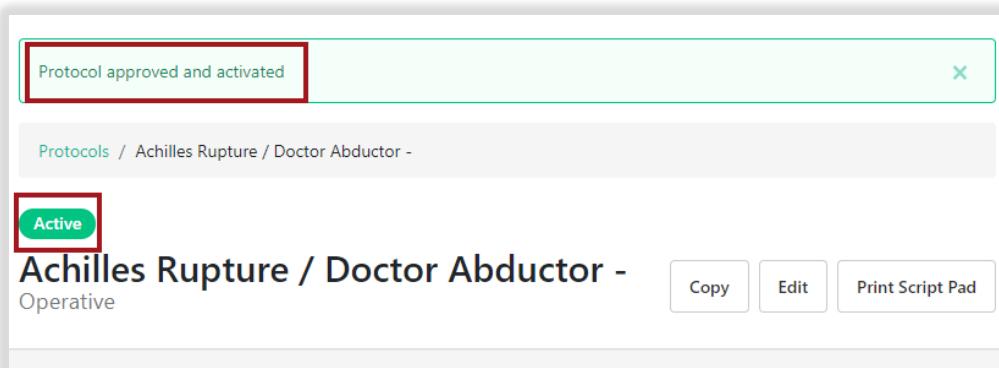
Indication
Achilles Rupture

Clear Signature

Approve Protocol

Cancel

Once the provider has signed, the protocol will show **Approved and Activated**.



Protocol approved and activated

Protocols / Achilles Rupture / Doctor Abductor -

Active

Achilles Rupture / Doctor Abductor -
Operative

Copy

Edit

Print Script Pad

After a protocol is approved any edits made to the protocol will require provider signature to reactivate the protocol.

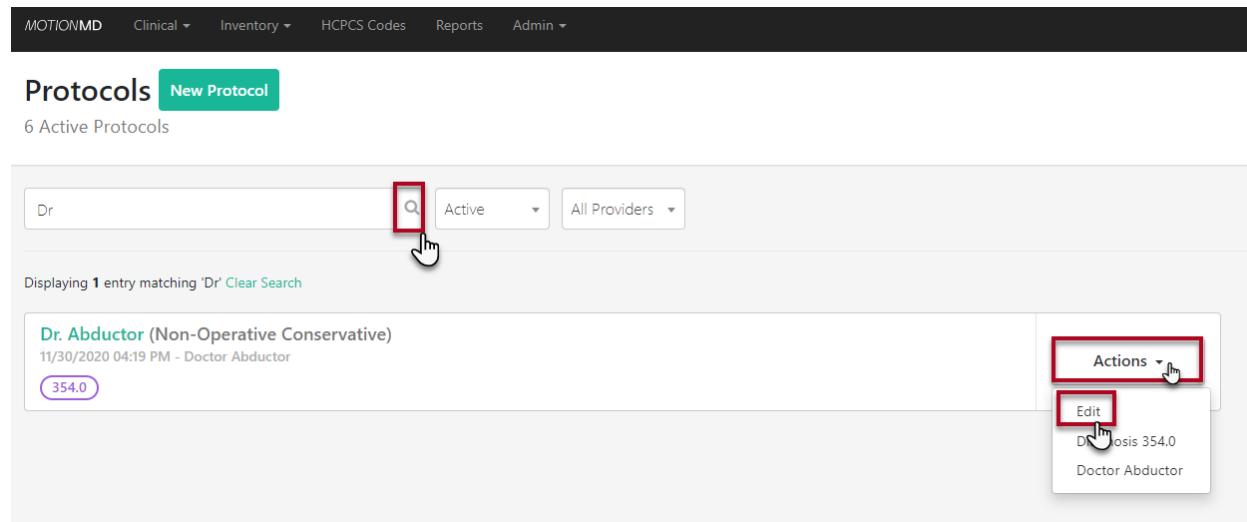
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5. Inactivating a Protocol

A protocol can be inactivated if the account no longer deems it necessary. **NOTE:** The ability to Edit is limited based on user role assigned.

Once a user is on the main Protocol page, search for the Protocol in question using the search box.

Select Action > Edit



MOTIONMD Clinical ▾ Inventory ▾ HCPCS Codes Reports Admin ▾

Protocols **New Protocol**

6 Active Protocols

Dr Q Active All Providers

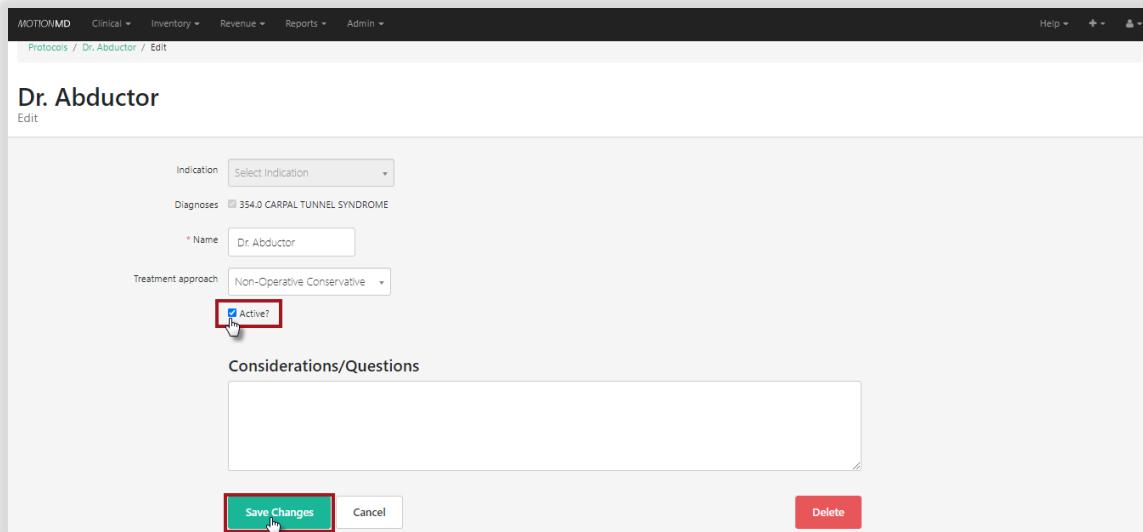
Displaying 1 entry matching 'Dr' [Clear Search](#)

Dr. Abductor (Non-Operative Conservative)
11/30/2020 04:19 PM - Doctor Abductor
354.0

Actions ▾

Edit Q Diagnosis 354.0 Doctor Abductor

The Edit page for the protocol will open. Unselect the **Active** box so it is unchecked. Then select **Save Changes**. The protocol is now inactive.



MOTIONMD Clinical ▾ Inventory ▾ Revenue ▾ Reports ▾ Admin ▾ Help ▾ + ▾

Protocols / Dr. Abductor / Edit

Dr. Abductor

Edit

Indication: Select Indication

Diagnoses: 354.0 CARPAL TUNNEL SYNDROME

* Name: Dr. Abductor

Treatment approach: Non-Operative Conservative

Active?

Considerations/Questions

Save Changes **Cancel** **Delete**