

OVERVIEW OF PROTOCOLS

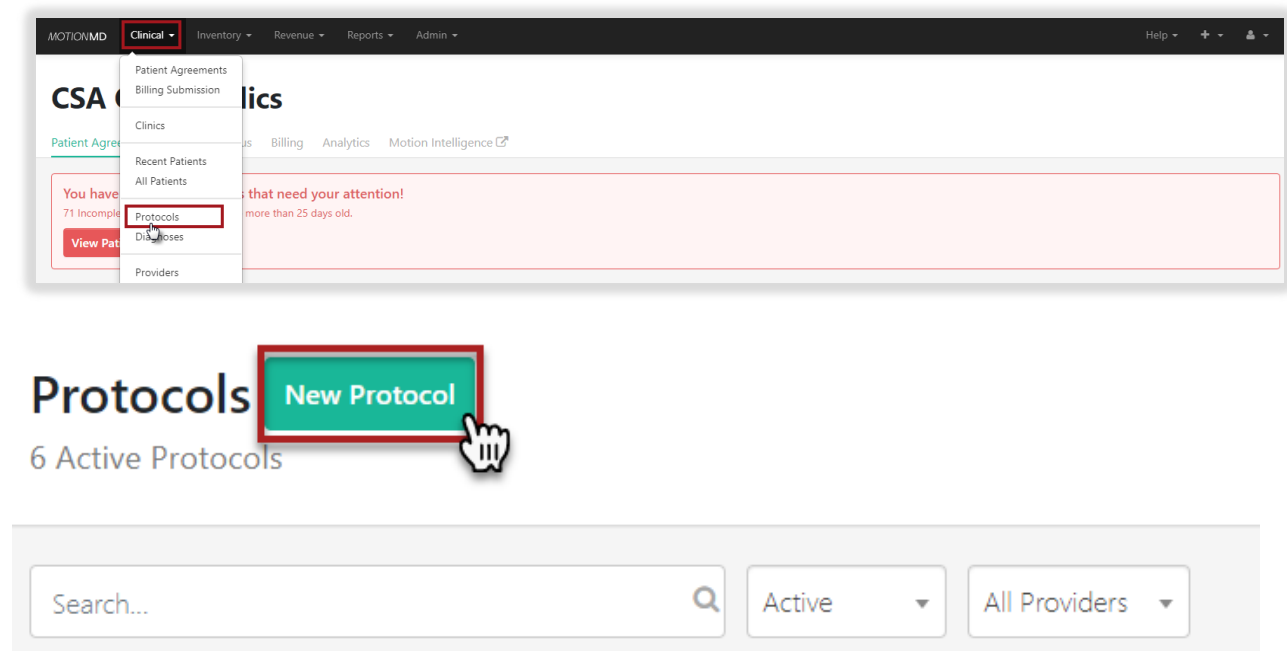
MotionMD® has a protocol library which lists suggested protocols and protocols that are specific to a provider. Users can access the Protocol Library to create a new protocol, copy an existing protocol and review any notes associated with a protocol. Suggested protocols have “Suggested” after the indication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

Diagnoses

Provider: Select a Provider

* Name

Treatment approach: Select Treatment

Considerations/Questions

Create Protocol 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.

MOTIONMD Clinical Inventory Revenue Reports Admin Help

Protocols / Achilles Rupture / Doctor Abductor

Active

Achilles Rupture / Doctor Abductor -
Operative

Copy Edit Print Script Pad

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

Actions

Actions

- Add Product
- Add Diagnosis
- Add Exercise
- Add Section
- Add Note
- All Activity

Details

Provider: Don Jay

Indication: Achilles Rupture

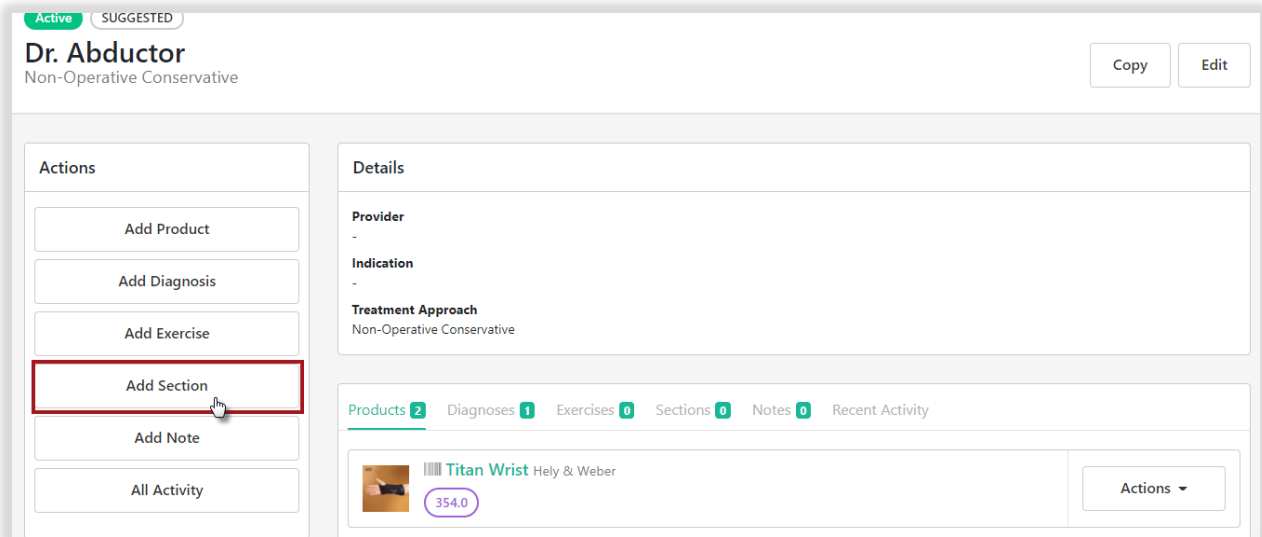
Treatment Approach: Operative

Products 1 Diagnoses 2 Exercises 1 Sections 1 Notes 1 Recent Activity Approval

MaxTrax Air Walker Boot DJO - Dorjay	M67.01 M67.02 M76.6	Actions
Crutches Medline	M67.01 M67.02 M76.6	Actions
IceMan CLEAR3 DJO - Aircast Patient Pay Only	M67.01 M67.02 M76.6	Actions

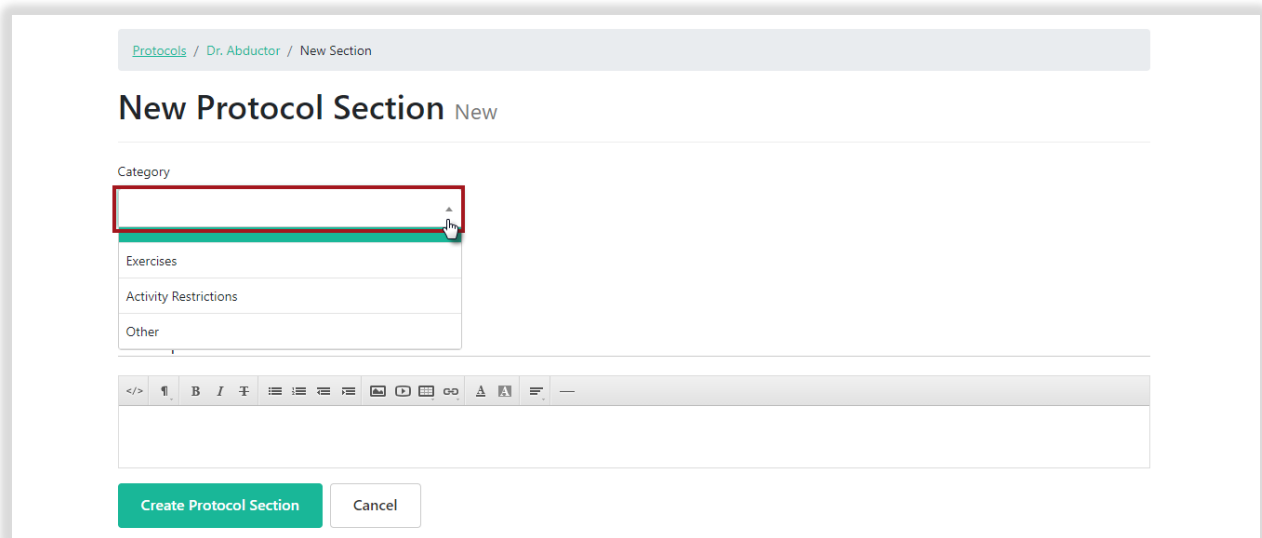
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If there is an exercise not listed in the drop-down menu or add Activity Restrictions, a user may do so by selecting the Add Section tab.



The screenshot shows the 'Dr. Abdutor' protocol page with the 'Non-Operative Conservative' treatment approach. In the left sidebar, the 'Add Section' button is highlighted with a red box. The main content area shows details for the protocol, including a list of products, diagnoses, exercises, sections, and notes. The 'Titan Wrist' product is currently selected, showing a value of 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.

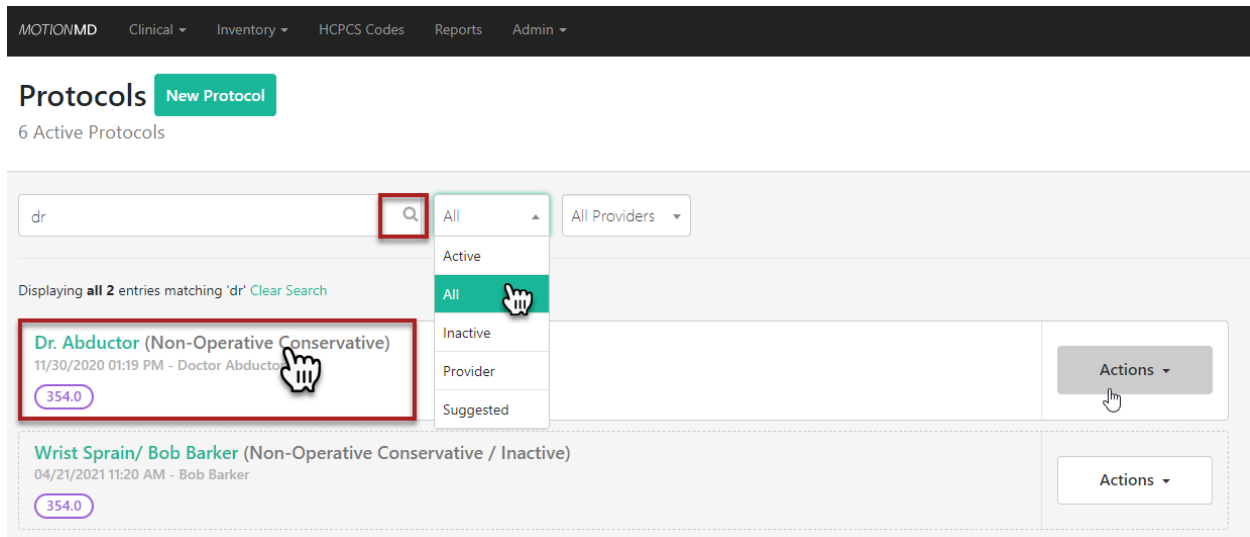


The screenshot shows the 'New Protocol Section' form. The 'Category' dropdown menu is open, showing options: 'Exercises', 'Activity Restrictions', and 'Other'. The 'Exercises' option is highlighted. Below the dropdown is a rich text editor with a toolbar containing various formatting and editing tools. At the bottom, there are 'Create Protocol Section' and 'Cancel' buttons.

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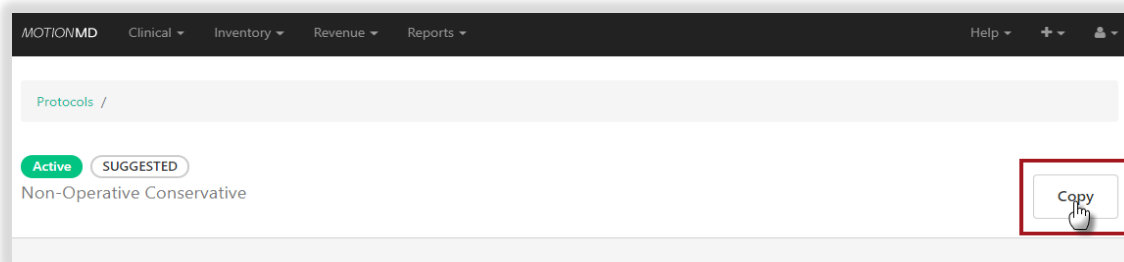
3. Customize an existing Suggested Protocol:

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.

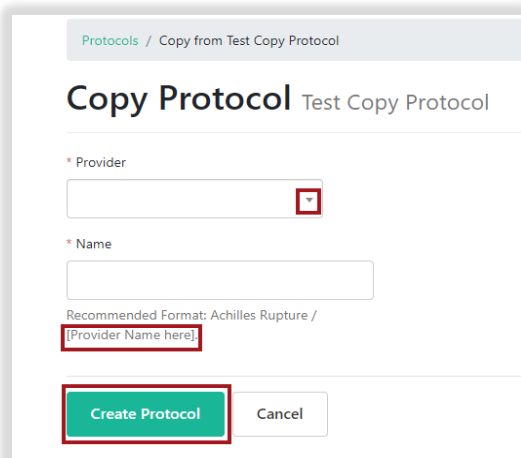


The screenshot shows the MOTIONMD Protocols page. At the top, there is a navigation bar with links: MOTIONMD, Clinical, Inventory, HCPCS Codes, Reports, and Admin. Below this, the 'Protocols' section is active, with a 'New Protocol' button. It shows '6 Active Protocols'. A search bar contains 'dr' and a magnifying glass icon. A dropdown menu is open, showing filters: All (selected), Active, Inactive, Provider, and Suggested. Below the filters, two protocols are listed. The first protocol, 'Dr. Abductor (Non-Operative Conservative)', is highlighted with a red box and a hand cursor. The second protocol, 'Wrist Sprain/ Bob Barker (Non-Operative Conservative / Inactive)', is also listed. Each protocol entry includes a date, time, and a code (354.0). An 'Actions' button is visible next to each protocol entry.

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



The screenshot shows the MOTIONMD Protocols page. The 'Protocols /' breadcrumb is visible. Below it, there are tabs for 'Active' and 'SUGGESTED'. The 'Non-Operative Conservative' protocol is listed. A red box highlights the 'Copy' button in the bottom right corner of the protocol entry.



The screenshot shows the 'Copy Protocol' pop-up box. The title is 'Copy Protocol Test Copy Protocol'. It contains two input fields: '* Provider' and '* Name'. The '* Provider' field has a dropdown arrow. Below the input fields, there is a note: 'Recommended Format: Achilles Rupture / [Provider Name here]'. At the bottom, there are two buttons: 'Create Protocol' and '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.

The left screenshot shows the protocol page for 'Achilles Rupture / Doctor Abductor - Operative'. At the top, a green message box states 'Protocol was successfully created.' Below the breadcrumb 'Protocols / Achilles Rupture / Doctor Abductor -', the status is 'Inactive'. A yellow box labeled 'Requires Approval' contains the text 'This protocol can not be active until the doctor has approved.' and a button 'Sign and Approve Protocol'. To the right, under 'Details', the provider is 'Doctor Abductor', the indication is 'Achilles Rupture', and the treatment approach is 'Operative'.

The right screenshot shows the 'Approve Protocol' modal. It displays 'Protocol Details' with the provider 'Doctor Abductor' and indication 'Achilles Rupture'. Below this is a signature field with a handwritten signature. There is a 'Clear Signature' button and an 'Approve Protocol' button at the bottom.

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

The screenshot shows the protocol page for 'Achilles Rupture / Doctor Abductor - Operative'. At the top, a green message box states 'Protocol approved and activated'. Below the breadcrumb 'Protocols / Achilles Rupture / Doctor Abductor -', the status is 'Active'. On the right side, there are three buttons: 'Copy', 'Edit', and '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

The screenshot shows the MOTIONMD web interface. At the top is a navigation bar with links: MOTIONMD, Clinical, Inventory, HCPCS Codes, Reports, and Admin. Below this is a header section with 'Protocols' and a 'New Protocol' button. It indicates '6 Active Protocols'. A search bar contains 'Dr' and a magnifying glass icon. To the right of the search bar are dropdown menus for 'Active' and 'All Providers'. Below the search bar, it says 'Displaying 1 entry matching 'Dr' Clear Search'. The entry is 'Dr. Abductor (Non-Operative Conservative)' with a date '11/30/2020 04:19 PM - Doctor Abductor' and a code '354.0'. To the right of the entry is an 'Actions' dropdown menu with an 'Edit' option highlighted.

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.

The screenshot shows the 'Dr. Abductor' Edit page. The page has a header with 'Dr. Abductor' and 'Edit'. Below this is a form with fields for 'Indication' (Select Indication), 'Diagnoses' (354.0 CARRAL TUNNEL SYNDROME), 'Name' (Dr. Abductor), and 'Treatment approach' (Non-Operative Conservative). There is a checkbox labeled 'Active?' which is currently checked. Below this is a text area for 'Considerations/Questions'. At the bottom are buttons for 'Save Changes', 'Cancel', and 'Delete'.