MOTIONMD ROLES OVERVIEW

This guide provides an overview of the roles that can be assigned to New Users in MotionMD. Users can only be created or modified by users with the Admin role. To determine the appropriate roles to provide a user, Admins should evaluate which business operations the user needs access to with their job responsibilities.

All roles in MotionMD are based on the following key functions: Claims Management, Inventory Management, and Administration. An overview of the operations a user can perform under those functions is listed below:

ADMIN: Account administrator who is responsible for managing users and all aspects of the account. This role is the highest level of visibility and access in the system.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	Create/View/Edit Products	Create/View/Edit Users
Add Attachments	Create/View/Edit/Check-in POs	Administrative Reports
Add Payment Methods	Create/View /Edit Manufacturers	
Utilize VeriPro (if enabled in account)	Create/View/Edit Stock Records	
Create Providers	Inventory Counts (if role assigned)	
Create/View/Edit Protocols	Inventory Usage (if role assigned)	
Billing Submission	Inventory Reports	

CLINICAL COORDINATOR: Recommended for users who oversee the daily management of DME.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	Create/View/Edit/Check-in POs	Administrative Reports
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create~~/View/~~Edit~~ Stock Records	
Create Providers	Inventory Counts (if role assigned)	
~~Create~~/View/~~Edit~~ Protocols	Inventory Usage (if role assigned)	
Billing Submission	Inventory Reports	

CLINICAL SPECIALIST: Recommend for users dispensing product, creating and managing patient agreements. Rental Products are excluded under limited inventory management.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	Create/View/Edit/Check-in POs	Administrative Reports
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create~~/View/~~Edit~~ Stock Records	
Create Providers	Inventory Counts (if role assigned)	
Create/View/Edit Protocols	Inventory Usage (if role assigned)	
Billing Submission	Inventory Reports	

MotionMD Roles Overview

KEY ACCOUNT REP: Recommended for users with greater responsibility than Clinical Coordinator.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	Create/View/Edit Products	~~Create/View/Edit Users~~
Add Attachments	Create/View/Edit/Check-in POs	Administrative Reports
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create~~/View/Edit Stock Records	
Create Providers	Inventory Counts (if role assigned)	
Create/View/Edit Protocols	Inventory Usage (if role assigned)	
Billing Submission	Inventory Reports	

PROCUREMENT: Inventory management role with minimal patient access.

~~CLAIMS MANAGEMENT~~	INVENTORY MANAGEMENT	~~ADMINSTRATION~~
~~Create/View/Edit Patient Agreements~~	Create/View/Edit Products	~~Create/View/Edit Users~~
~~Add Attachments~~	Create/View/Edit/Check-in POs	~~Administrative Reports~~
~~Add Payment Methods~~	~~Create~~/View /~~Edit~~ Manufacturers	
~~Utilize VeriPro (if enabled in account)~~	Create/View/Edit Stock Records	
~~Create Providers~~	Inventory Counts (if role assigned)	
~~Create/View/Edit Protocols~~	Inventory Usage (if role assigned)	
~~Billing Submission~~	~~Inventory Reports~~	

SALES REP: Patient claim management with no ability to manage inventory.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	~~ADMINSTRATION~~
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	~~Create/View/Edit/Check-in POs~~	~~Administrative Reports~~
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create/View/Edit Stock Records~~	
Create Providers	~~Inventory Counts (if role assigned)~~	
Create/View/Edit Protocols	~~Inventory Usage (if role assigned)~~	
Billing Submission	~~Inventory Reports~~	

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ADD-ON ROLES

These roles are intended to be utilized in addition to standard roles assigned above to provide additional access to specific features in the platform.

INVENTORY ADMIN: Administrative role designated for users to have access to all inventory management features.

INVENTORY COUNTS: Allows users to create and review inventory counts. Does not include permission to apply counts.

PROTOCOL CREATOR: Adding this role allows users to access protocol pages to create and manage protocols for providers within the system.

PSR: Patient Service Representative responsible for creating PAs and restock orders. Similar responsibilities as the Clinical Specialist role. Adding this role will expand permissions for managing restocks.

VERIPRO™ COLLECTOR: Provides visibility to process collections for patient EPR. Adding this role provides users with visibility to the VeriPro™ dashboard in an account enabled with VeriPro™.

STANDALONE ROLES

The roles below were designed to be standalone roles. Additional roles assigned to a user with one of these roles will override the permissions.

BILLING: A user with this role has access to claims with no inventory permissions.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	~~Create/View/Edit/Check-in POs~~	Administrative Reports
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create/View/Edit Stock Records~~	
Create/View Providers	~~Inventory Counts (if role assigned)~~	
~~Create/View/Edit Protocols~~	~~Inventory Usage (if role assigned)~~	
Billing Submission	~~Inventory Reports~~	

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CLINICAL SUPPORT TECHNICIAN: A user with this role has access to only claims and inventory management.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	Create/View/Edit/Check-in POs	Administrative Reports
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create~~/View/~~Edit~~ Stock Records	
Create Providers	Inventory Counts (if role assigned)	
~~Create~~/View/Edit Protocols	Inventory Usage (if role assigned)	
~~Billing Submission~~	Inventory Reports	

EXTERNAL CLINICAL SPECIALIST: Recommended for users managing claims with only view access in limited areas of inventory management.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	~~ADMINSTRATION~~
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	~~Create/View/Edit/Check-in POs~~	~~Administrative Reports~~
Add Payment Methods	~~Create~~/View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create/View/Edit Stock Records~~	
Create Providers	~~Inventory Counts (if role assigned)~~	
Create/View/Edit Protocols	~~Inventory Usage (if role assigned)~~	
Billing Submission	~~Inventory Reports~~	

EXTERNAL PROVIDER: Recommended for providers to log in and access the e-signing page. This role needs to be created from the Provider's page.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	~~ADMINSTRATION~~
Create/View/Edit Patient Agreements	~~Create~~/View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	~~Create/View/Edit/Check-in POs~~	~~Administrative Reports~~
Add Payment Methods	~~Create/View /Edit Manufacturers~~	
Utilize VeriPro (if enabled in account)	~~Create/View/Edit Stock Records~~	
~~Create Providers~~	~~Inventory Counts (if role assigned)~~	
~~Create~~/View/~~Edit~~ Protocols	~~Inventory Usage (if role assigned)~~	
~~Billing Submission~~	~~Inventory Reports~~	

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PA CREATOR: A role with limited responsibilities. For users who are only creating the Patient Agreement while fitting the patient and need to quickly capture the product and the patient's signature.

CLAIMS MANAGEMENT	~~INVENTORY MANAGEMENT~~	~~ADMINSTRATION~~
Create/View/Edit Patient Agreements	~~Create/View/Edit Products~~	~~Create/View/Edit Users~~
~~Add Attachments~~	~~Create/View/Edit/Check-in POs~~	~~Administrative Reports~~
~~Add Payment Methods~~	~~Create/View /Edit Manufacturers~~	
~~Utilize VeriPro (if enabled in account)~~	~~Create/View/Edit Stock Records~~	
Create Providers	~~Inventory Counts (if role assigned)~~	
~~Create/~~View~~/Edit~~ Protocols	~~Inventory Usage (if role assigned)~~	
~~Billing Submission~~	~~Inventory Reports~~	

PA CREATOR PLUS: Expanded PA Creator Role with the ability to complete a claim for billing. Users with this role are restricted from submitting PAs to billing and can only view inventory management.

CLAIMS MANAGEMENT	INVENTORY MANAGEMENT	ADMINSTRATION
Create/View/Edit Patient Agreements	~~Create/~~View/~~Edit~~ Products	~~Create/View/Edit Users~~
Add Attachments	~~Create/~~View/~~Edit~~/Check-in POs	Administrative Reports
Add Payment Methods	~~Create/~~View /~~Edit~~ Manufacturers	
Utilize VeriPro (if enabled in account)	~~Create/~~View/~~Edit~~ Stock Records	
Create Providers	~~Inventory Counts (if role assigned)~~	
~~Create/~~View/Edit Protocols	~~Inventory Usage (if role assigned)~~	
~~Billing Submission~~	Inventory Reports (Limited)	

ROLES NO LONGER SUPPORTED

All roles listed below should not be assigned to any Users as these roles are not tested nor supported in development.

- Collector
- Customer Care
- MotioniQ
- Protocol Financial Reviewer
- Scheduler