

# USING CELLTRAK VISIT MANAGER

The federal 21st Century CURES Act signed into law on December 13, 2016 requires states to implement Electronic Visit Verification (EVV). CellTrak is a mobile application used to meet EVV requirements. The app records both the duration and location worked by an attendant at the time of service.

This guide is about using CellTrak to log and approve time worked on the attendant's smart phone.

**Note:** Attendants must first register their mobile device with CellTrak. Please refer to the registration guide available on your local Consumer Direct website or by contacting Consumer Direct for more information.

## Note on Terminology:

People enrolled in a Medicaid program and who receive Consumer Direct payroll services are called a **"Consumer."** They may also be called a "Service Recipient" or "Participant."

Workers who provide services to the Medicaid recipient are called an **"Attendant."** They may also be called an "Employee" or "Direct Service Worker."

An **"Activity"** in CellTrak may also be referred to as a "Visit."

## Contents

- Participant Visit Overview**..... Page 2
- Starting a Visit**..... Page 2
- Completing a Visit** ..... Page 4
- Changing Your Password**..... Page 7
- Frequently Asked Questions** ..... Page 9

# Logging a Visit: Overview

Recording a visit in CellTrak is a two step process.  
Everything is done from the attendant's smart phone.

**Step One** At the start of a shift, the attendant logs in to the CellTrak app and begins an "Unscheduled Participant Visit." It's called an "Unscheduled Visit" because visits are not scheduled in CellTrak ahead of time.

**Step Two** At the end of the shift, the attendant logs in to CellTrak again and answers some questions. Then both attendant and EOR sign the shift in Celltrak.

After the shift has been logged it is submitted electronically to Consumer Direct for processing. Sometimes an attendant may forget to start CellTrak when they start working or forget to "clock out." The attendant will have the option to make corrections and submit to the EOR for approval through the web portal.

## Starting a Shift

*Reminder: Attendants must download and register with CellTrak before they will be able to log time and location services must be active on your phone (see FAQs, page 12).*

- 1 On your mobile device open the CellTrak App.
- 2 Log in to CellTrak with your password (Figure 1).
- 3 Tap **Run Unscheduled Participant Visit** (Figure 2).

*Starting a Shift, continued next page*

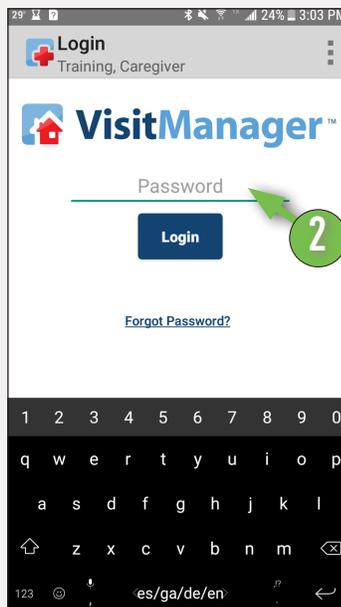


Figure 1: Login Screen

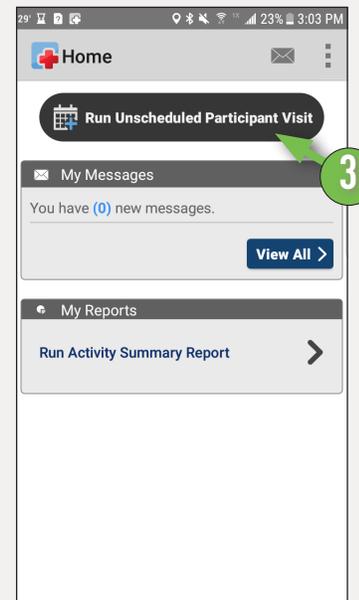


Figure 2: Run Unscheduled Participant Visit Button

# Starting a Shift, cont.

**4** On the **Participant Lookup Screen** tap either the search bar or the magnifying glass (Figure 3).

**5** From the list of consumers **tap the name of the consumer** who will be receiving service (Figure 4).

*Note: If you tap the wrong name you can search again by tapping the magnifying glass icon (Figure 5, A).*

**6** **Tap the blue arrow** at the bottom of the screen (Figure 5).

**7** **Tap Start** (Figure 6).  
(you still need to select a service type, see next page)

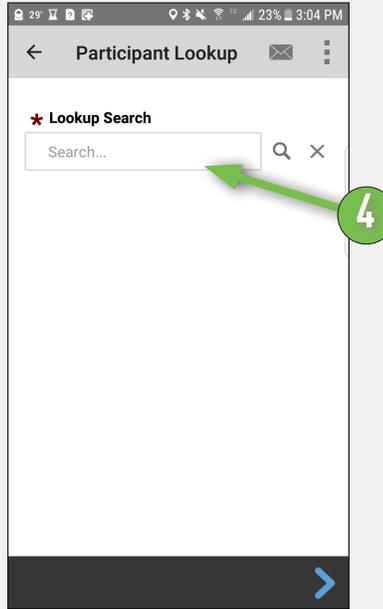


Figure 3: Participant Lookup

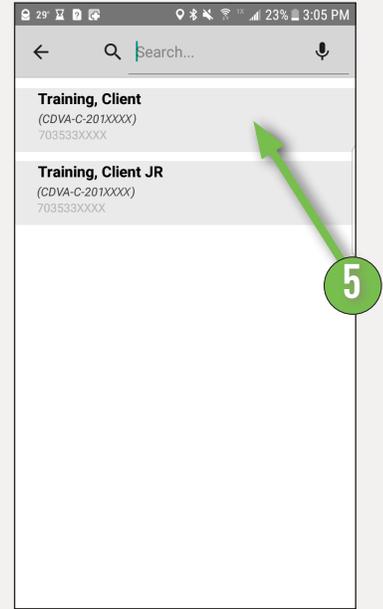


Figure 4: List Of Consumers

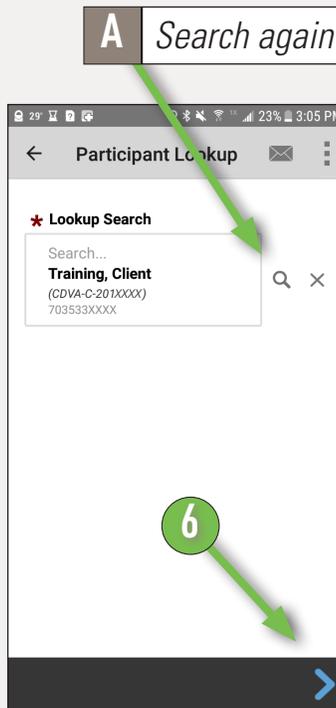


Figure 5: Tap Forward button

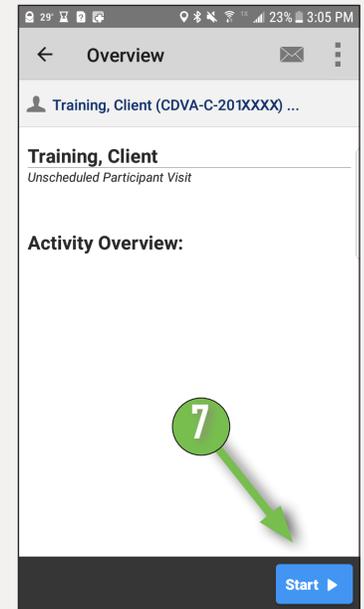


Figure 6: Start Visit Button

Starting a Shift, continued next page

# Starting a Shift, cont.

**8** Next pick the correct service type from the **Choose Workgroup** window (Figure 7). Workgroup means Service Type.

**9** Tap the **blue arrow** at the bottom of the screen to continue.

This starts your shift. **Do not tap Finish** at this time (as seen in Figure 8). You may now put your phone away. Instructions for Ending a Shift follow.

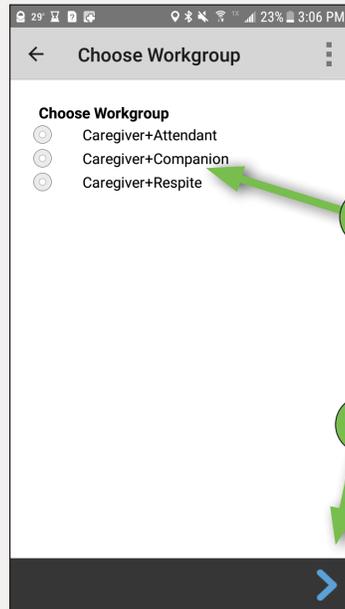


Figure 7: Choose Workgroup

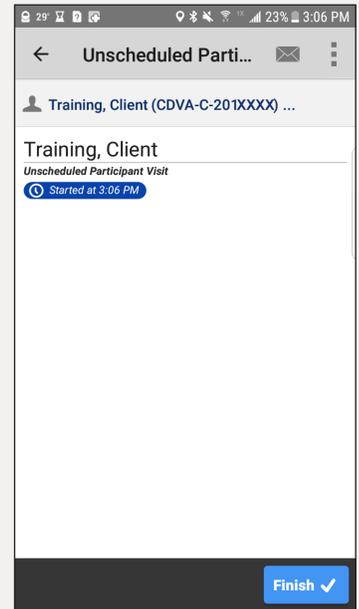


Figure 8: Active Visit Window

# Ending a Shift

When the attendant completes their shift they need to **Finish** the shift in CellTrak.

Finishing a shift in CellTrak has several steps: Collecting signatures, identifying if an adjustment is needed, and submitting the shift.

**1** Open **CellTrak** and Login again, if needed.

**2** Tap the **Finish** button to begin completing the visit (Figure 9).

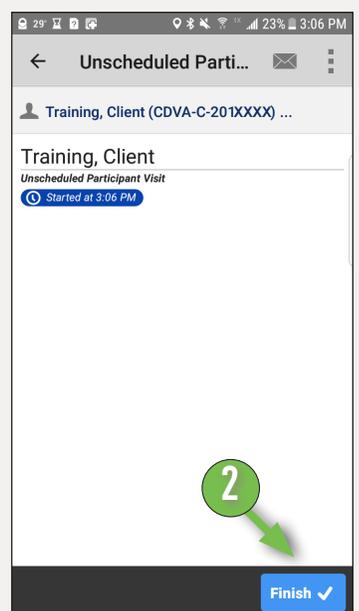


Figure 9: Finish Button

*Ending a Shift, continued next page*

# Ending a Shift: Acquiring Signatures

Two signatures are needed when ending a shift (Figure 10):

- The EORs and
- The attendant's

Each of these is collected in the same way. We'll go through the steps for the EOR signature, and then you'll do the same thing for the attendant.

**3** Answer if you are able to obtain the EORs signature (Figure 10).

- If **Yes** (3Y), a signature field will appear. Tap on it and a signing window appears. The EOR then signs using their fingers or a stylus (Figures 11 & 12).

- If **No** (3N), you will need to enter a reason why the signature was not captured (Figure 13). Also see the FAQs.

**4** If you were able to obtain a signature, select who's signature was captured (Figures 14 & 15).

*continued next page*

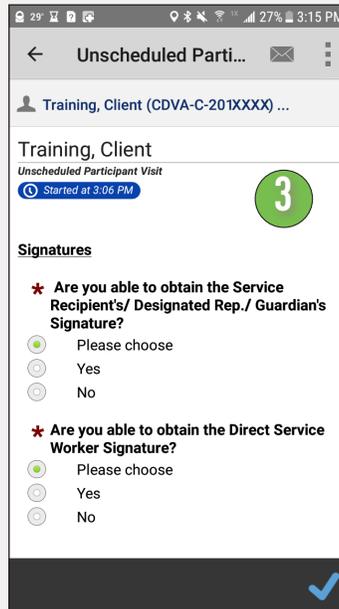


Figure 10: Required Signatures

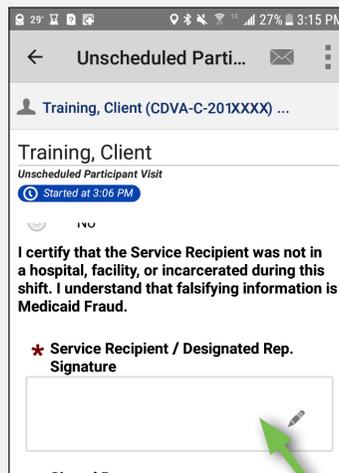


Figure 11: Signature Field



Figure 12: Captured Signature

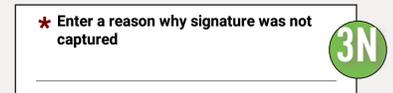


Figure 13: Reason No Signature

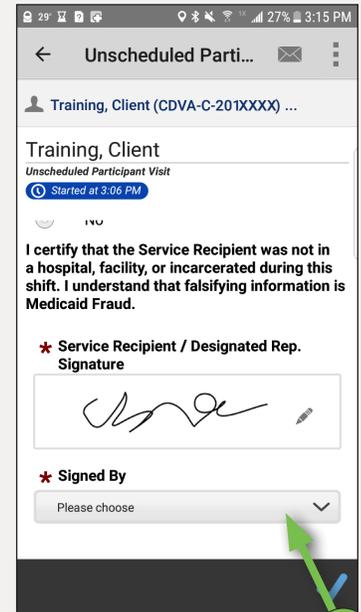


Figure 14: Signed By

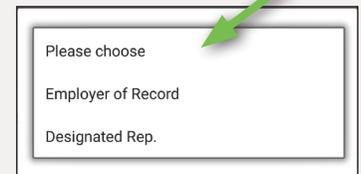


Figure 15: Signed By Selection

Note the eraser icon when signing. This allows you to make changes if there is an error.

# Ending a Shift, Acquiring Signatures, cont

5 The last step of acquiring a signature is to **enter the name of the person signing** (Figure 16).

6 Now repeat the signature process for the attendant (CellTrak refers to the attendant as a *Direct Service Worker* here).

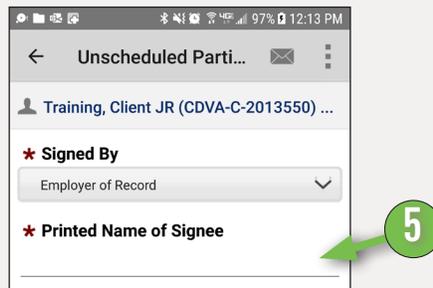


Figure 16: Printed Name of Signee

# Ending a Shift: Wrapping Up

7 If need to make a correction to your shift, such as changing the service type, start or end time, select Yes to make an adjustment.

**Enter the specific adjustment and the reason** (e.g. "change start time to 7:00 am" "logged in late"). (Figure 17).

7 You are not required to enter any **Visit Summary Notes** (Figure 18).

9 Tap the **Blue Checkmark** to submit time worked!

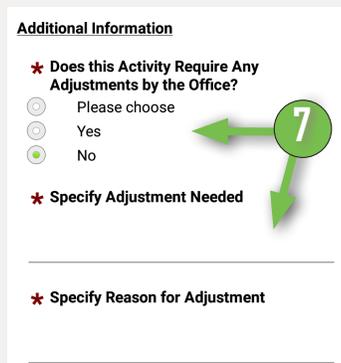


Figure 17: Entering an Adjustment

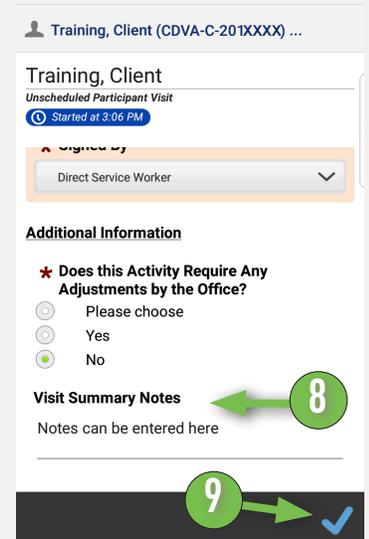


Figure 18: Summary Notes

# Forgetting/Changing Your Password

If you have forgotten your password, or would like to change it, you can do so directly from the CellTrak mobile application. The simplest way to begin is to correctly answer the two Challenge Questions you chose during registration.

**A** Resetting your password begins either by entering it wrong three times or by tapping "Forgot Password" (Figure 22).

**B** You'll be asked to correctly answer the two Challenge Questions you chose during registration. You'll have three attempts for each Challenge Question.

**If successful**, you can choose a new password (next page).

**C** Your account will be locked after three wrong answers to a Challenge Question (Figure 24). You will need an Unlock Code to reset your password. Contact CDCN for an unlock code. Email: infoCDVA@consumerdirectcare.com Phone: 888-444-8182

Entering the unlock code and tap "Unlock Account >" You can now enter a new password (next page).

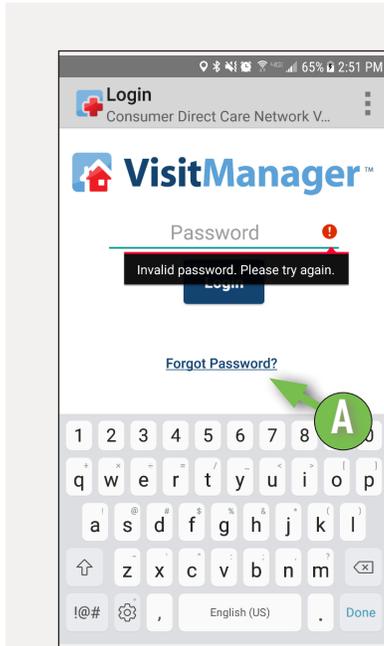


Figure 22: Forgot Password Link

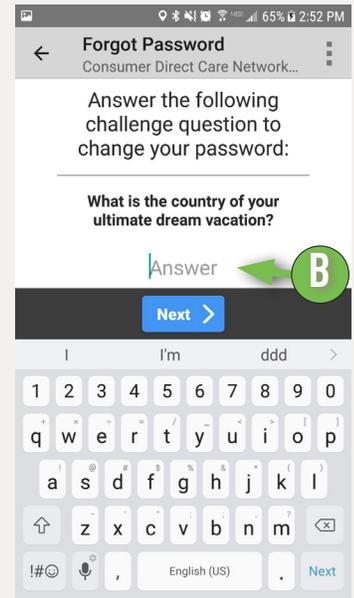


Figure 23: Answer Challenge Questions to reset password.

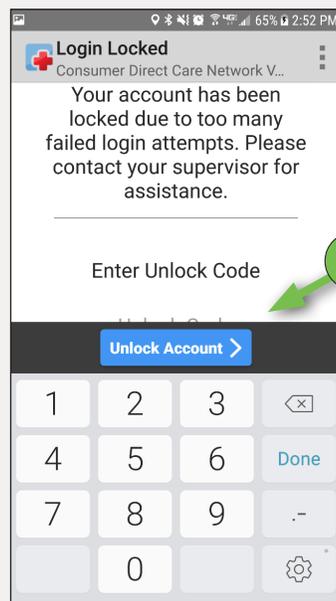


Figure 24: Account Locked.

# Forgetting/Changing Your Password, cont.

**D** **Pick your new password.** Enter it once to create it and then again to verify it. (Figures 13 & 14).

Your password must be 6 characters long and does not have any special requirements.

**E** You'll then need to pick and answer new Challenge Questions (Figure 26).

**F** Tap "Set Password" and you'll be able to login to CellTrak with your new password!

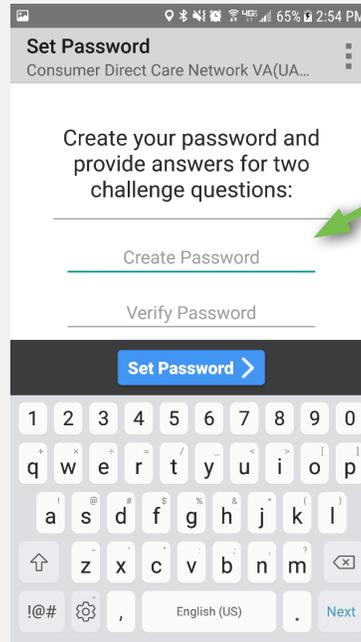


Figure 25: Enter password twice.

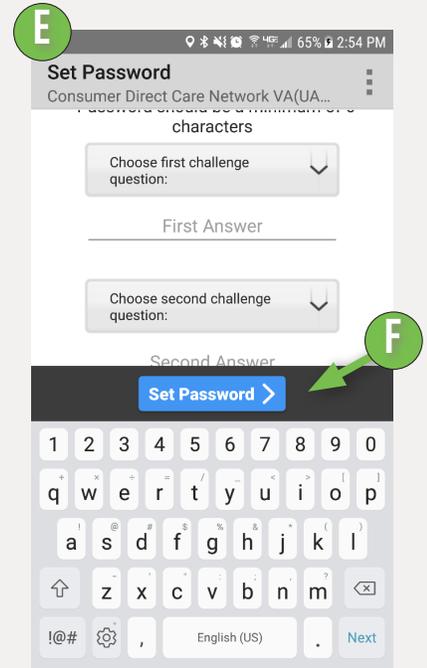


Figure 26: Choose New Challenge Questions

# Frequently Asked Questions

More training materials are online at <https://www.consumerdirectva.com/training-materials/>

## SHIFT QUESTIONS

### **I received an error "Invalid User ID or Last Name."**

Your User ID or Last Name may have been incorrectly entered. This can also happen when CellTrak does not find an active authorization for any of your consumers. You must have at least one active consumer to use CellTrak.

**How do I make a correction to my shift?** Any corrections to your time will be fixed on the CDCN Web Portal. When you select Yes to make an adjustment in CellTrak, (see step 8 on page 6), your shift is sent to the Web Portal. Make the corrections on the Web Portal then submit to your EOR for approval. If you miss a shift, enter it on the CDCN Web Portal (see the [Web Portal Guide](#) on how to enter time).

### **Do EORs have to approve in real time?**

EORs can approve in real time in CellTrak or at a later time on the CDCN Web Portal (see the [Web Portal Guide](#)).

### **What happens when I'm unable to get the EOR's signature?**

If your EOR is unable or unavailable to enter their signature in Celltrak, select No when

you are asked for the EORs signature. Enter a reason why you were unable to get their signature (page 5). The shift will be sent to the CDCN Web Portal for the EOR to approve (see the [Web Portal Guide](#) on how to approve time).

### **I work more than one service in a shift.**

#### **What do I do?**

Each service performed must be logged separately. For example, if you perform Respite from 11:00 am to 12:00 pm and then Attendant services from 12:00 pm to 3:00 pm, You would need to start Respite in CellTrak at 11 and end it at 12, then start a new shift for Attendant at 12 and end it at 3.

### **Do I have to log my shifts in real time?**

Yes. CellTrak or the IVR option must be used to comply with the 21st century CURES Act EVV requirements.

### **I received an Invalid User ID or Last Name" or "No matching participant found" error.**

This can also happen when CellTrak does not find an active authorization for the consumer you are looking for.

# Frequently Asked Questions, cont.

More training materials are online at <https://www.consumerdirectva.com/training-materials/>

## PHONE QUESTIONS

### **How much data does CellTrak use?**

CellTrak typically uses less than 100 Mb/month.

### **I'm using the same phone but have a new phone number, do I need to do anything?**

You do not need to do anything. CellTrak is registered to your device, not your phone number.

### **I have a new phone, do I need to register again?**

Yes. Download the CellTrak app to your new phone and follow the registration steps again.

### **My phone died and I don't have a charger. How do I end my shift?**

Your shift will keep running in CellTrak even if your phone runs out of batteries or is turned off. After charging your phone and turning it back on, open CellTrak, complete the shift and enter an adjustment. It will need to be corrected in the CDCN Web Portal (see the [Web Portal Guide](#)).

### **CellTrak won't open or won't let me complete my shift.**

Contact Consumer Direct for assistance. email: [infoCDVA@consumerdirectcare.com](mailto:infoCDVA@consumerdirectcare.com) phone: 888-444-8182

### **I'm locked out of CellTrak after CDCN hours. What do I do?**

If you have not started your shift, use IVR if possible. If you are in the middle of a shift, end it with IVR or with CellTrak once you are able to log in again (following the Reset Password instructions on page 7). A shift ended in CellTrak this way will need an adjustment so it can be corrected on the CDCN Web Portal (see the [Web Portal Guide](#)).

# Frequently Asked Questions, cont.

More training materials are online at <https://www.consumerdirectva.com/training-materials/>

## GPS/LOCATION SERVICES

### **Do I need to turn on location services on my smart phone?**

Yes. Effective 10/10/2019 using location services will be required. This is to comply with the 21st century CURES Act EVV requirements.

### **How do I turn on location services for my phone?**

If you have an Android, follow the instructions at: <https://support.google.com/accounts/answer/3467281?hl=en>

If you have an iPhone, follow the instructions at: <https://www.wikihow.com/Turn-On-Location-Services-on-an-iPhone-or-iPad>

You may need to ask your cell phone provider for help.

### **I tapped "Don't show me again" when asked about turning on location services.**

### **How do I turn them on again?**

See the How do I turn on location services FAQ above.

## REGISTRATION

### **How do I register?**

Registration is covered in a separate guide. See the [Registration Guide](#) on how to register.

### **Do consumers need to register?**

Only attendants need to register. You pass your phone on to the employer for their signature.

## OTHER QUESTIONS

### **I see a messaging button. What is that for?**

Messaging in CellTrak allows you to correspond with other attendants who work with your consumers.

Consumer Direct may also send you messages in CellTrak.