



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 a mobile device with location services.

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

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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."

Logging a Visit: Overview

Recording a visit in CellTrak is a two step process.

Step One At the start of a shift, the attendant logs in to the CellTrak app and taps "Run Shift." They then pick a participant and a service if prompted.

Step Two At the end of the shift, the attendant logs in to CellTrak again. They make any corrections to the start or end time of this shift if necessary. Then both attendant and EOR sign the shift in Celltrak.

Note: Sometimes an attendant may forget to start CellTrak when they start working or forget to "clock out." The attendant is able to adjust their time right in CellTrak, however this is considered an adjustment. Adjustments are no longer EVV compliant and usage will be monitored.

Starting a Shift

Reminder: Attendants must download and register with CellTrak before they will be able to log time. Location services must be active on your phone (see FAQs, page 10).

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

Starting a Shift, continued next page



Figure 1: Login Screen

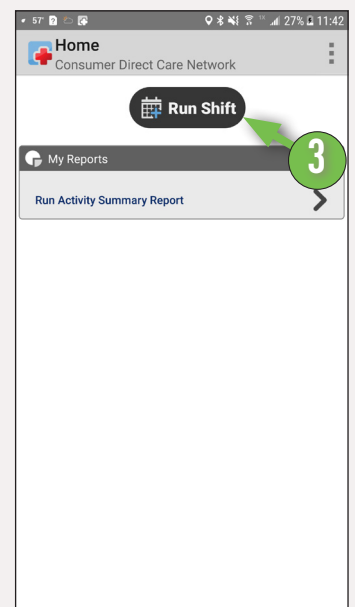


Figure 2: Run Shift Button

Starting a Shift, cont.

4 Pick the **consumer** who will be receiving service (Figure 3).

5 Tap the **blue arrow** at the bottom of the screen (Figure 3).

6 Tap **Start** (Figure 4).
(You may still need to select a service type.)

7 If prompted, pick the correct service type from the **Choose Workgroup** window (Figure 5).
Workgroup means Service.

8 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 6). You may now put your phone away. Instructions for Ending a Shift follow.

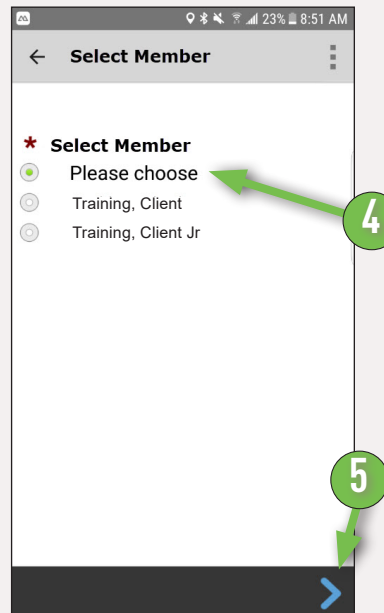


Figure 3: Select Consumer

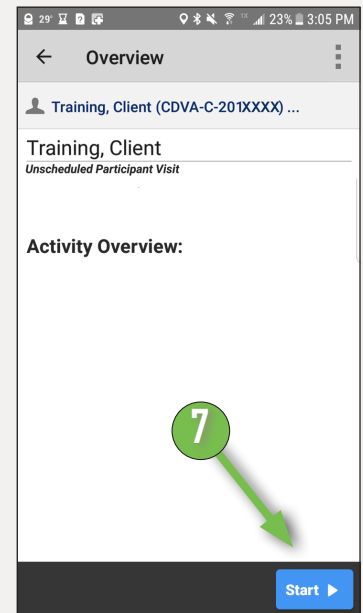


Figure 4: Start Visit Button

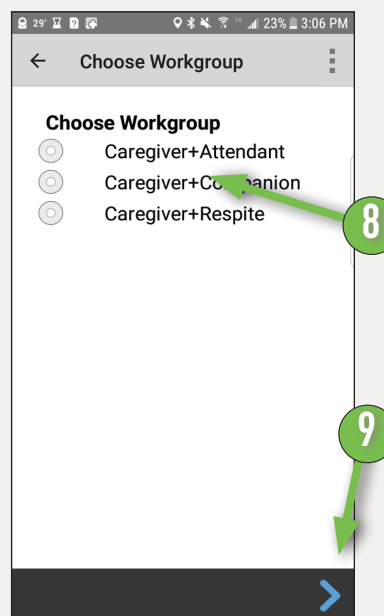


Figure 5: Choose Workgroup

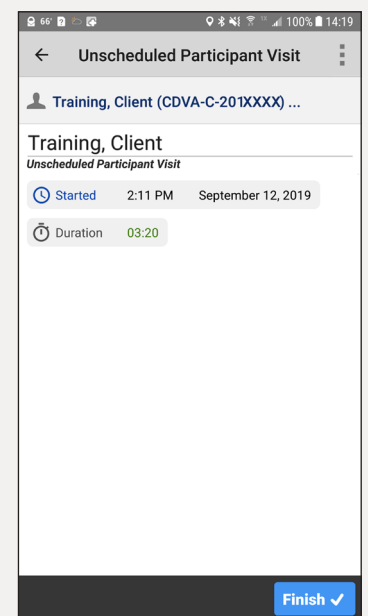


Figure 6: Active Visit Window

Starting a Shift, continued next page

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: Making an adjustment to the start or end time (if necessary), collecting signatures, and submitting the shift.

- 1 Open **CellTrak** and Login again, if needed.
- 2 Tap the **Finish** button to begin completing the visit (Figure 7).

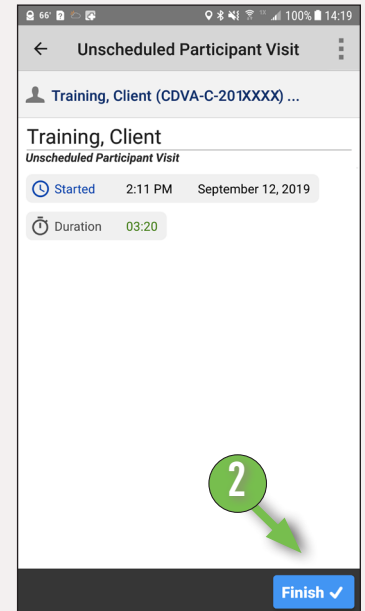


Figure 7: Finish Button

Ending a Shift: Adjusting Time

Important: If you adjust the dates or times of a shift, that shift is no longer EVV compliant.

When you finish a shift, a visit summary is shown at the top of your device. It includes when the shift was started, when it was finished, the duration and service (Figure 8). Note that the Service Delivered is also shown. It is after the Visit Adjustments section.

- 3 You can adjust the start or finish time if they are wrong. If the **started and finished time is right**, leave the "Yes" check box below "Visit Adjustments" **unchecked** and skip to step 7 on page 6 (Figure 8). If the **start or finish time is wrong** check "Yes." You would do this, for example, if you forgot to clock in to start the shift.

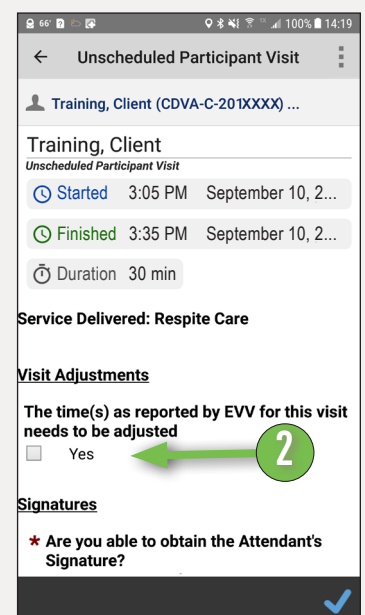




Figure 8: Ending a shift screen

Ending a Shift: Adjusting Time, cont

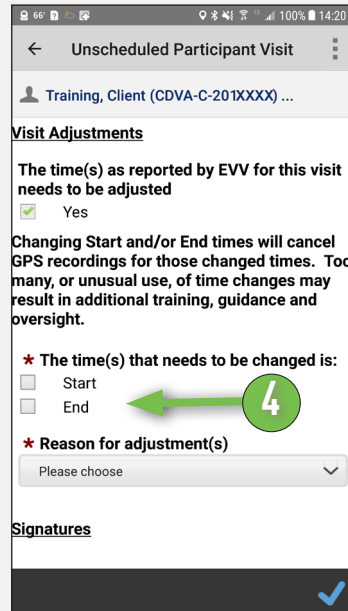
If the start and end time of your shift are correct, skip to step 7 on page 6!

4 Tap the check box if the Start and/or End time needs to be adjusted (Figure 8.5).

This opens fields where the date and time can be changed. You will also be warned that unusual changes or adjusting time too much can result in additional training, guidance, and oversight (Figure 9)

5 Use the calendar  and clock  buttons to pick the correct dates and times (Figures 9 and 9.5).

continued next page



Unscheduled Participant Visit

Training, Client (CDVA-C-201XXXX) ...

Visit Adjustments

The time(s) as reported by EVV for this visit needs to be adjusted

☒ Yes

Changing Start and/or End times will cancel GPS recordings for those changed times. Too many, or unusual use, of time changes may result in additional training, guidance and oversight.

* The time(s) that needs to be changed is:

☐ Start

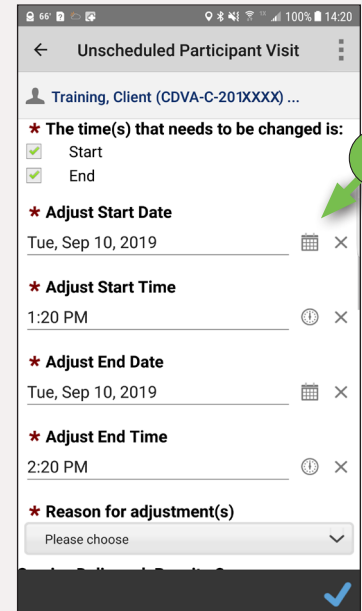
☒ End

* Reason for adjustment(s)

Please choose

Signatures

Figure 8.5: Pick times to change



Unscheduled Participant Visit

Training, Client (CDVA-C-201XXXX) ...

* The time(s) that needs to be changed is:

☒ Start

☒ End

* Adjust Start Date

Tue, Sep 10, 2019

* Adjust Start Time

1:20 PM

* Adjust End Date

Tue, Sep 10, 2019

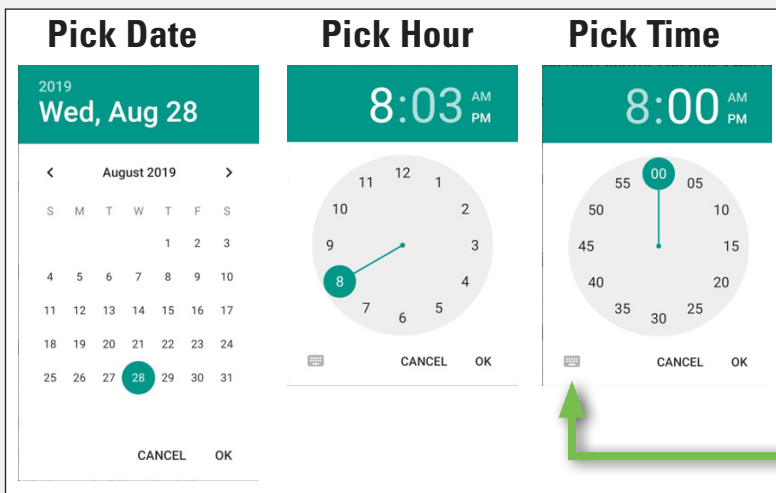
* Adjust End Time

2:20 PM

* Reason for adjustment(s)

Please choose

Figure 9: Adjust Date and Time fields



Pick Date

2019
Wed, Aug 28

August 2019

S M T W T F S

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

CANCEL OK

Pick Hour

8:03 AM PM

CANCEL OK

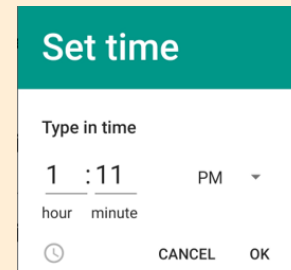
Pick Time

8:00 AM PM

CANCEL OK

Figure 9.5: Picking date and time

Note: There is another way to set time. Tap the keyboard button to type in the time instead of using the round clock.



Set time

Type in time

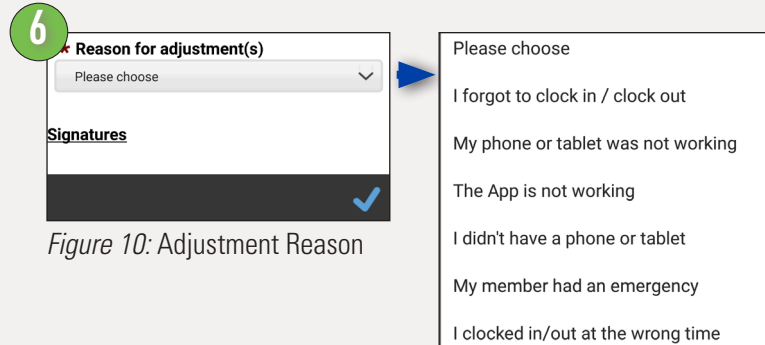
1 : 11 PM

hour minute

CANCEL OK

Ending a Shift: Adjusting Time, cont

6 Choose a reason the shift is being adjusted.



6 Reason for adjustment(s)

Please choose

Signatures

Figure 10: Adjustment Reason

Please choose

- I forgot to clock in / clock out
- My phone or tablet was not working
- The App is not working
- I didn't have a phone or tablet
- My member had an emergency
- I clocked in/out at the wrong time

Ending a Shift: Acquiring Signatures

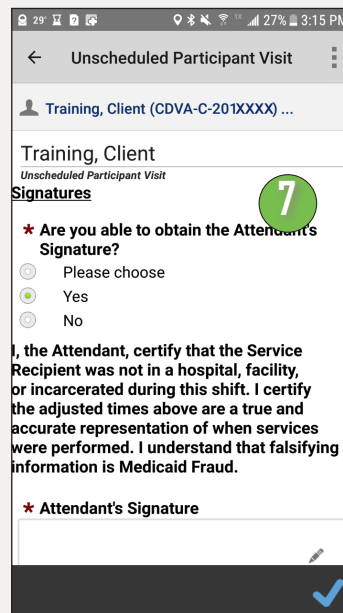
Two signatures are needed when ending a shift (Figure 10.5):

- The attendant's and
- The employers

Each of these is collected in the same way. We'll go through the steps for the attendant's signature, and then the employer will do the same steps for their part.

7 Answer if you are able to obtain the attendant's signature (Figure 10.5).

- If **Yes** (7Y), tap on the signature field below it and a signing window appears. The attendant then signs using their fingers or a stylus (Figures 11 & 12).



Unscheduled Participant Visit

Training, Client (CDVA-C-201XXXX) ...

Training, Client

Unscheduled Participant Visit

Signatures

* Are you able to obtain the Attendant's Signature?

☐ Please choose

☒ Yes

☐ No

I, the Attendant, certify that the Service Recipient was not in a hospital, facility, or incarcerated during this shift. I certify the adjusted times above are a true and accurate representation of when services were performed. I understand that falsifying information is Medicaid Fraud.

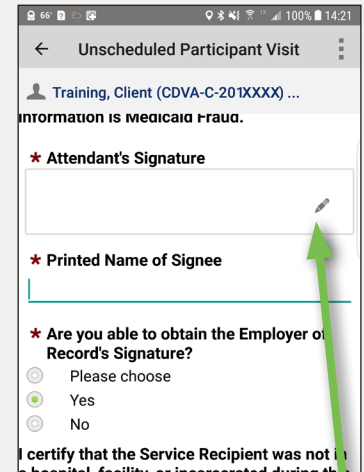
* Attendant's Signature

Figure 10.5: Required Signatures

Figure 10.5: Required Signatures



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



Unscheduled Participant Visit

Training, Client (CDVA-C-201XXXX) ...

Information is Medicaid Fraud.

* Attendant's Signature

* Printed Name of Signee

* Are you able to obtain the Employer or Record's Signature?

☐ Please choose

☒ Yes

☐ No

I certify that the Service Recipient was not in a hospital, facility, or incarcerated during this shift.

Figure 11: Signature Field

Figure 11: Signature Field



Signature Capture

Figure 12: Captured Signature

Figure 12: Captured Signature

**Step 7 continued
on next page**

Ending a Shift: Acquiring Signatures, cont.

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

8 The last step of acquiring the attendant's signature is to **enter the name of the person signing** (Figure 14).

9 Now repeat the signature process for the employer.

The signature process for the employer includes picking a role

10 Pick the employer's role in the Signed By area (Figures 15 and 16).

11 Tap the **Blue Checkmark** to submit time worked! (Figure 17).

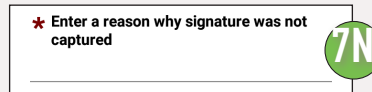


Figure 13: Reason No Signature

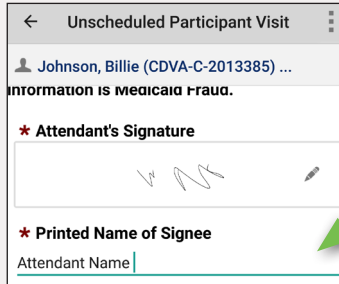


Figure 14: Printed Name of Signee

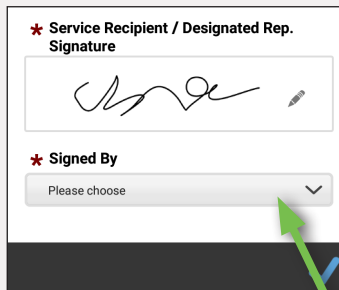


Figure 15: Signed By

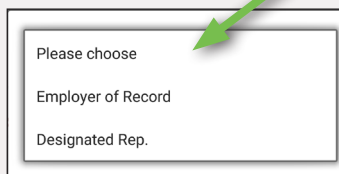


Figure 16: Signed By Selection

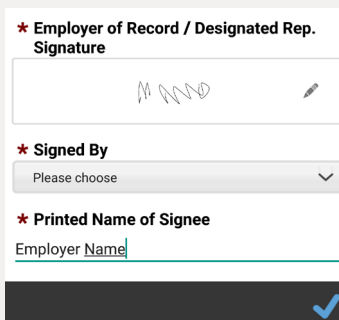


Figure 17: Submit time with checkmark

Forgetting/Changing Your Password

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).

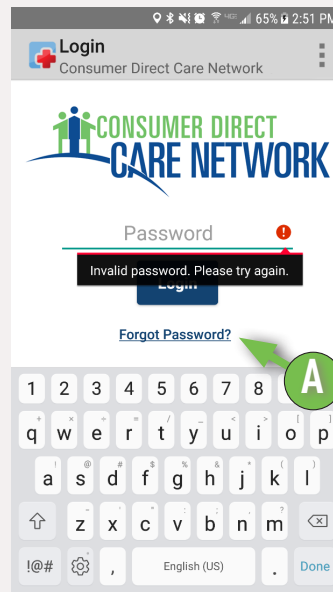


Figure 22: Forgot Password Link

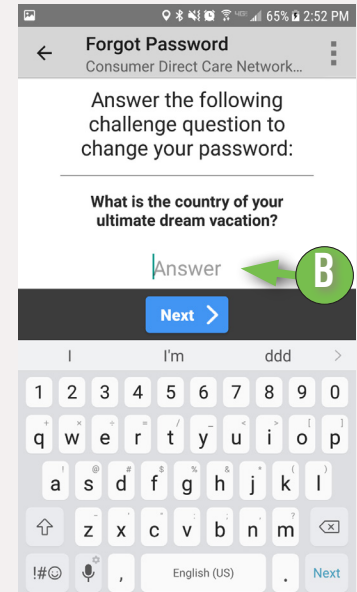


Figure 23: Answer Challenge Questions to reset password.

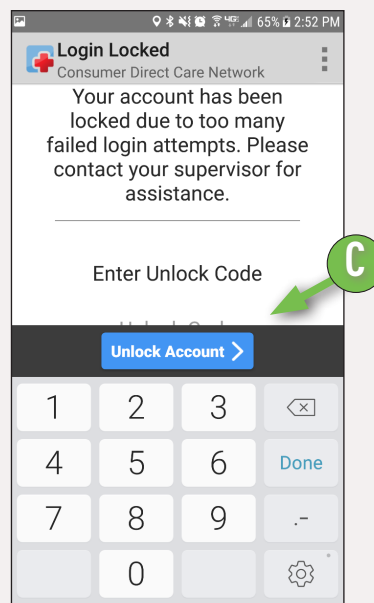


Figure 24: Account Locked.

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!

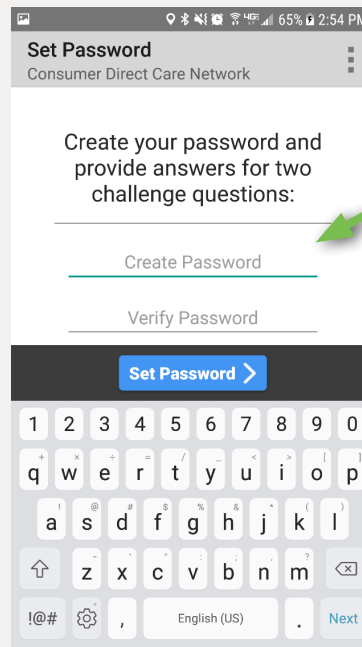


Figure 25: Enter password twice.

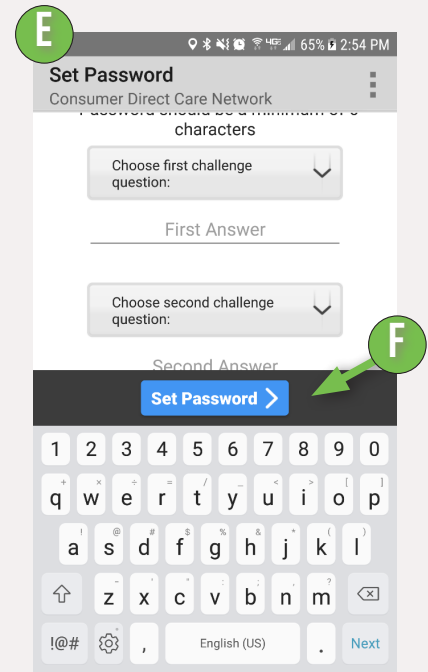


Figure 26: Choose New Challenge Questions

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" or "No matching participant found."

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.

What if I miss a shift?

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 sign and approve in real time?

Your EOR 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 7). 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.

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.

More Frequently Asked Questions, next page

Frequently Asked Questions, cont.

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

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

Yes. Download the CellTrak app to your new phone and contact CDCN. We will need to unregister your old phone so that you can register your new one.

email: infoCDVA@consumerdirectcare.com
phone: 888-444-8182

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 adjust the end time.

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

First try restarting your phone. If that does not work, contact Consumer Direct for assistance.
email: 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, otherwise log it in the CDCN Web Portal. If you are in the middle of a shift, end it

with CellTrak once you are able to log in again (following the Reset Password instructions on page 8). Make an adjustment to the end time (see page 4).

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 FAQ directly before this one for instructions.

Frequently Asked Questions, cont.

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

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. When the attending is finishing a shift they pass the phone on to the employer for their signature.