



**CR Mobile
Premium Users
PLAYBOOK**

January 2022
Version 2.11

CentralReach

CR Mobile

CR Mobile is CentralReach's end-to-end mobile application for behavior technicians, designed to streamline the workflow for direct 1:1 ABA therapy appointments.

This playbook is for the premium version for organizations who subscribe to CR Mobile, and assign CR Mobile permissions to their users. Features include both data collection and scheduling, client information, session notes, and Electronic Visit Verification.

Looking for the free version included with a CentralReach clinical subscription? [View clinical-only CR Mobile Playbook.](#)



CR Mobile Features Overview

	Feature	Included with CR Clinical Subscription	Premium CR Mobile Features
My Learners: Collecting ABA Data	Offline mode	✓	✓
	Data Collection with 9 acquisition data types	✓	✓
	Session graphs, instructional notes and comments	✓	✓
	ABC Data Collection	✓	✓
	Sessions organized by learner	✓	✓
My Appointments: Schedule + Notes	Appointment conversion	✗	✓
	Client Address Map View	✗	✓
	Mobile Session Notes	✗	✓
	Electronic Visit Verification (EVV)	✗	✓

Recommended Devices & Operating Systems

Minimum Recommended Devices:

- iPhone 8 & X: iOS 13.x
- Samsung S9: Android 9.x or Android 10.x
- iPad 6th Gen. (A1822/3): iOS 13.x
- iPad Pro 3rd Gen.: iOS 13.x
- iPad Mini 4 (A1538/50): iOS 13.x
- Galaxy Tab A 8.0 2017 (SM-T380): Android 9.x
- Galaxy Tab A 2018 (SM-T387): Android 9.x
- Galaxy Tab A 10.5 (SM-T590): Android 9.x

Operating Systems (OS):

- iOS: current version and the version prior
- Android: current version and the version prior



Note: For best results, we recommend an iOS or Android device released in the last couple of years, updatable to the most recent operating system, and equipped with GPS capability.

Before Getting Started: Setup & Permissions

Before getting started...

Non-EVW Workflow

Complete the following before providers can begin using CR Mobile:

1. Enable CR Mobile permissions for applicable users.
2. Ensure client appointments have both a geocoded address and a service code attached.
3. Download the CR Mobile app from GooglePlay or App store.
4. *If using clinical:* Sessions/Data Sheets must be created and shared with providers. Ensure these are download prior to going offline.
5. *If using Session Notes:* Create Session Note templates in Learn, then attach templates in Service Codes > Associate Templates. (Remove other templates from Service Codes > Note Templates as appropriate.)



Before getting started: EVV Workflow

Complete the following before providers can begin using CR Mobile to deliver services requiring Electronic Visit Verification (EVV):

- Freely subscribe to [Tellus EVV](#) and/or [Sandata EVV](#).
- Enable CR Mobile permissions for applicable users.
- Tick the “Visit Verification” checkbox in Service Code Properties. Ensure client appointments have both a geocoded address and an EVV service code attached.
- Download the CR Mobile app from GooglePlay or App store.
- To validate EVV geolocation when the appointment starts, the mobile device location services must be enabled, and user must have internet connectivity
- *If using clinical:* Sessions/Data Sheets must be created and shared with providers. Ensure these are download prior to going offline.
- *If using Session Notes:* Create Session Note templates in Learn, then attach templates in Service Codes > Associate Templates. (Remove other templates from Service Codes > Note Templates as appropriate.)



Recommended Permissions for CR Mobile Users

- **CR Mobile > Access:** this provides the employees with the ability to access and use the CR Mobile application
- **CR Mobile > Map > Access:** this provides the employees with the ability to access and use map feature
- **Learn > Access:** this provides the employee the ability to open a Session within CR Mobile (As usual, you will also need to share pertinent Sessions with the employee)
- **Learn > Session Note > Edit Note:** this provides the employee with the ability to edit session notes
- **Learn > Session Note > Add Note:** this provides the employee with the ability to add session notes
- **Learn > Session Note > Delete Note (optional):** this provides the employee with the ability to delete session notes
- **Scheduling > Access:** employees with need this permission enabled to have access to the Scheduling Module
- **Billing > Access:** this provides the employee the ability to see the \$ (Billing) Module icon which is needed to access Timesheets
- **Billing > Draft Timesheets > Access:** this provides the employee the ability to open Draft Timesheets
- **Billing > Timesheets > Access:** this provides the employee the ability to review completed Timesheets that are created by them from CR Mobile if there are no exceptions to the Timesheet
- **Billing > Timesheets > Allow Conversion Modification (optional):** this will allow the employee to edit certain pieces of information on the Draft Timesheet, such as time worked, Service Code, Units, etc.

Plus, choose one or both of the permissions below:

- **Billing > Draft Timesheets > Manage:** this allows employees to edit Electronic Visit Verification (EVV) exceptions and submit drafts when EVV exceptions are present.
- **Draft Timesheets > Submit Draft:** this allows employees to edit non-EVV exceptions (like note required) and submit drafts with any exceptions other than EVV exceptions.
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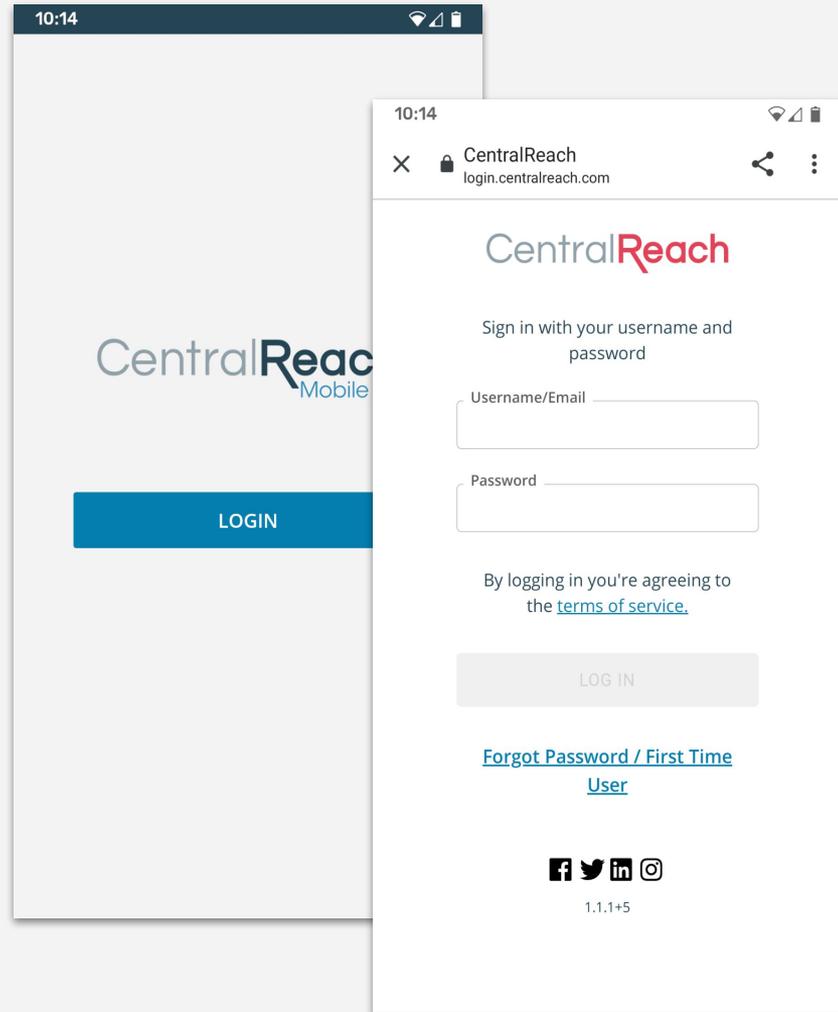
User Access:

Menu and Settings

User Access

Users will be able to log in using their CentralReach credentials. *You must be online to log in, set up your pin, and download information from CentralReach.*

Once logged in, set up a pin code for quick and secure *offline* access.



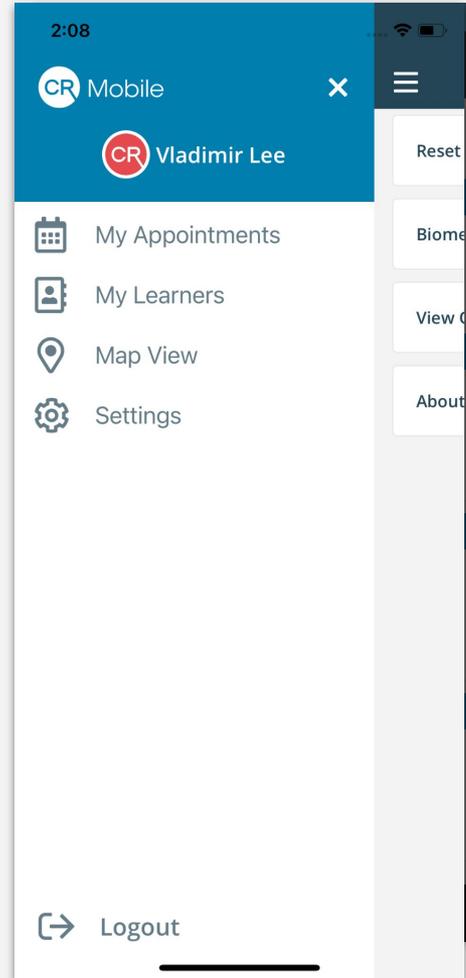
Main Menu

For premium users (with a CR Mobile subscription and permission), the main menu will display:

- My Appointments
- My Learners
- Map View
- Settings

CR Mobile automatically syncs for offline data collection, and uses cellular data when available to sync back to the CentralReach web platform.

Note: We recommend checking to ensure that your appointment(s) and session(s) have downloaded prior to going to offline.



Main Menu

Settings

Users can set up (or reset) their login preferences on the Settings screen.

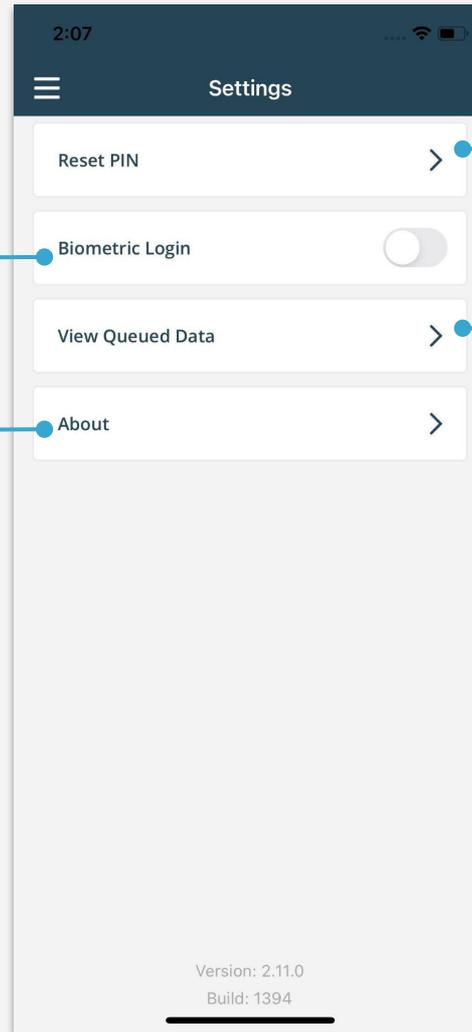
Plus, this screen allows users to see if data has been sent to CentralReach or is still in the queue.

- Reset PIN
- Biometric Login
- View Queued Data
- About

Note: We recommend checking to ensure that your appointment(s) and session(s) have downloaded prior to going to offline.

Toggle to set up FaceID or Fingerprint login

View details about your app version, plus legal links.



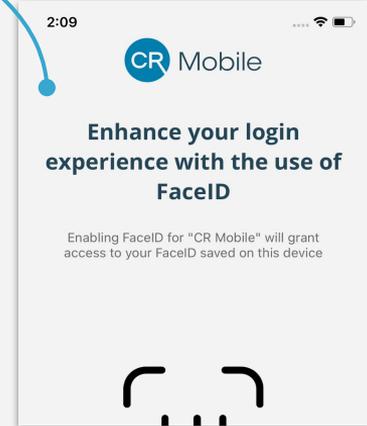
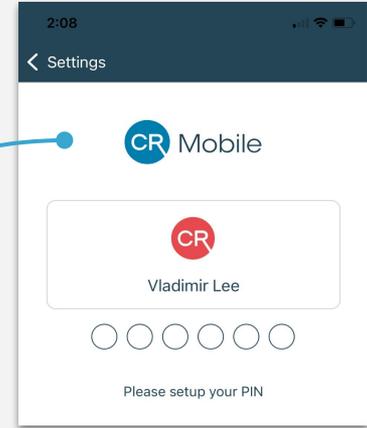
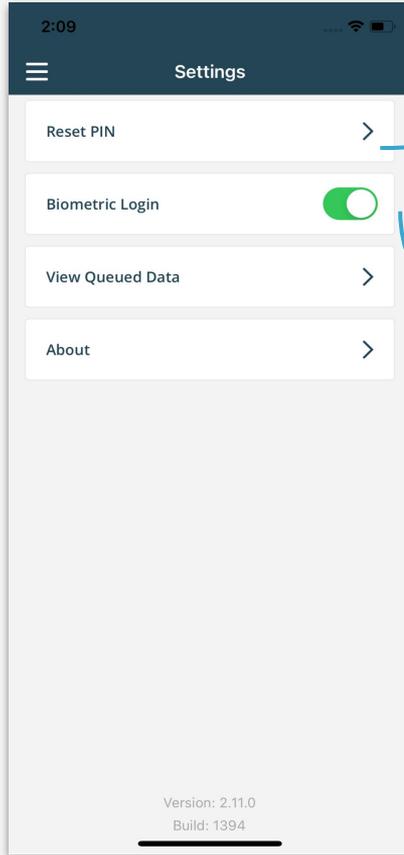
Tap to reset PIN code for rapid login

See if all data is sent, or if data is queued to send to CentralReach.

Resetting Your Pin & Biometrics Login

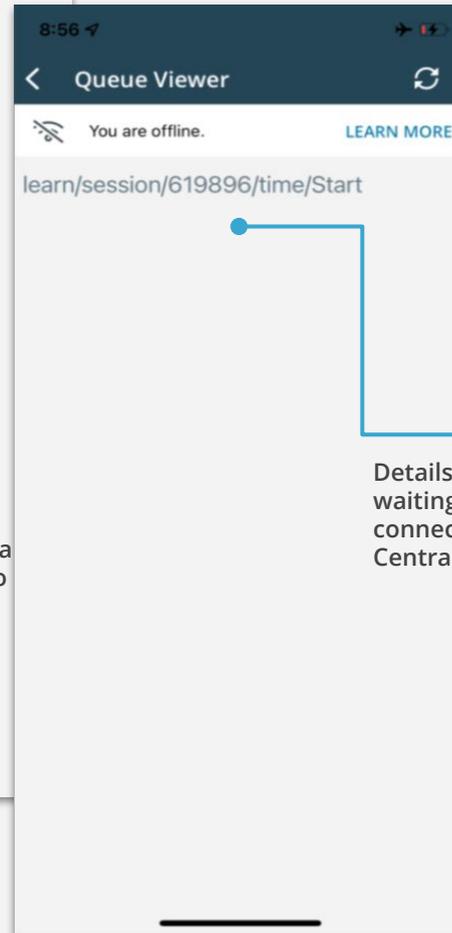
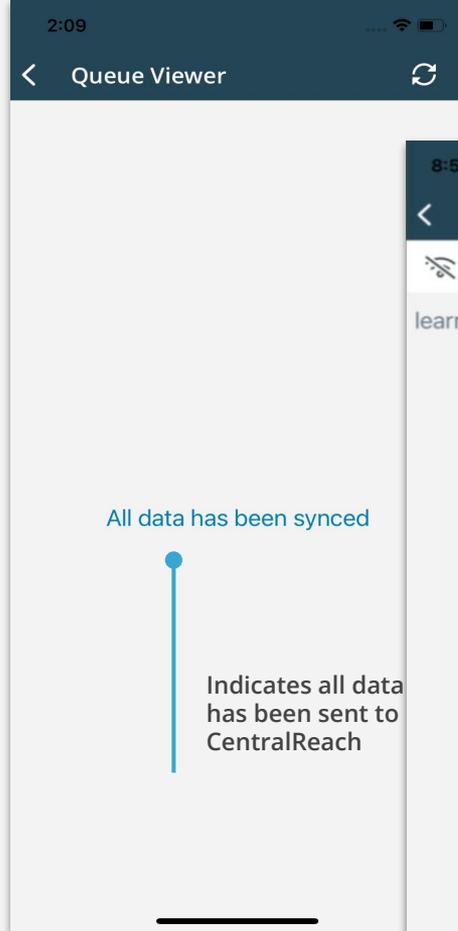
Reset PIN allows users to reset the quick PIN code that supports rapid login.

Users may also toggle on **Biometric Login** and to open CR Mobile via FaceID (if supported by your device) or Fingerprint, rather than by PIN code.



View Queued Data

From the **Settings** screen, tap **View Queued Data** to see if any data that was collected is waiting to be synced back to the CentralReach platform.

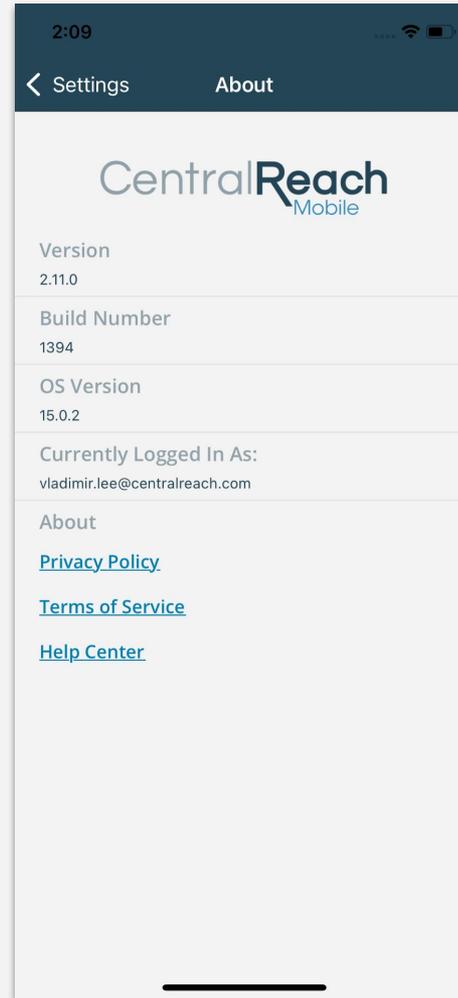


This banner appears if you are not connected to the internet.

Details on the data that is waiting for an internet connection to sync to CentralReach

About Screen

Users may also tap **About** to see information on your version, build, OS, and more, which can be useful when logging support cases.



My Appointments:

Starting a Session

My Appointments

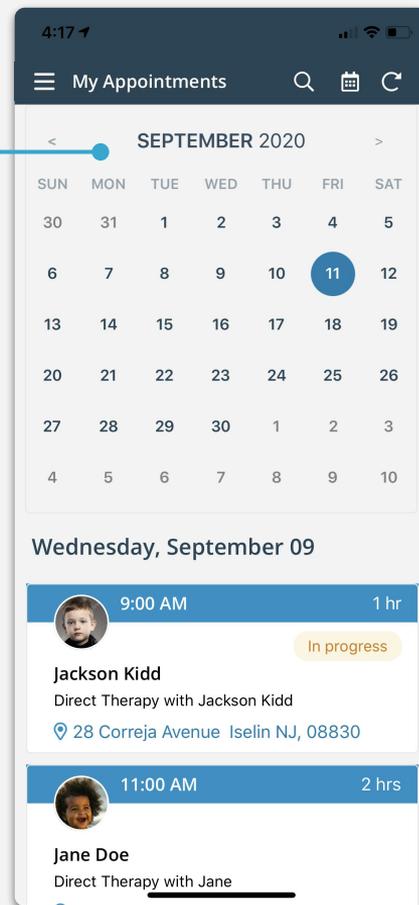
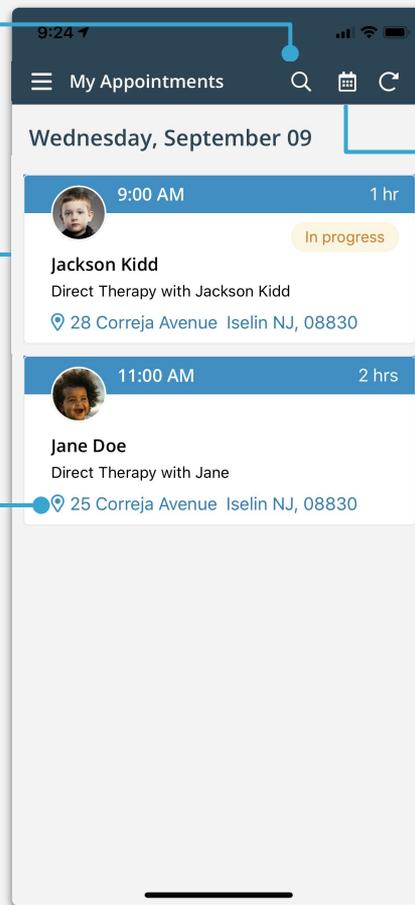
When accessing My Appointments providers will land on the current date to view appointments already booked and other information including:

- Client's contact details
- Appointments status
- Access to Appointment Card to start/end appointment, collect signatures, and more

Search for an appt.

Tap to access appointment card to start/end appt. and view more details

Tap to start GPS navigation



Tap to select date

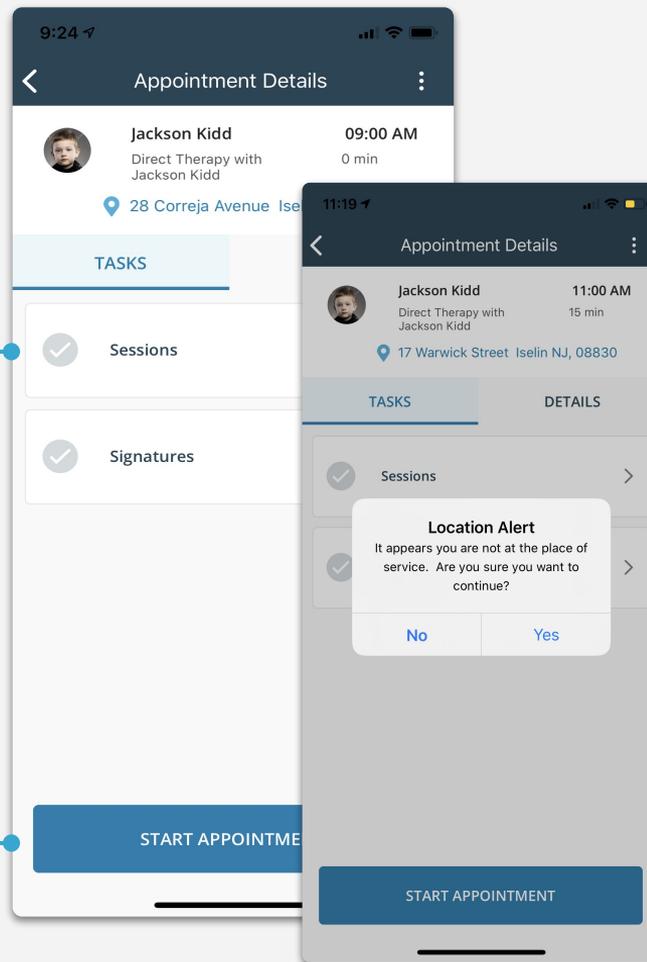
Appointment Card

The client's Appointment Card contains appointment information and contact details. Here providers are able to:

- Start appointment and automatically save timestamp.
- Automatically record appointment geolocation (for EVV) based on the provider's real time location when the appointment begins.
- Access client's Sessions to begin data collection.

Access client's Sessions

Tap to start appt. and clock



My Learners:

Collecting ABA Data

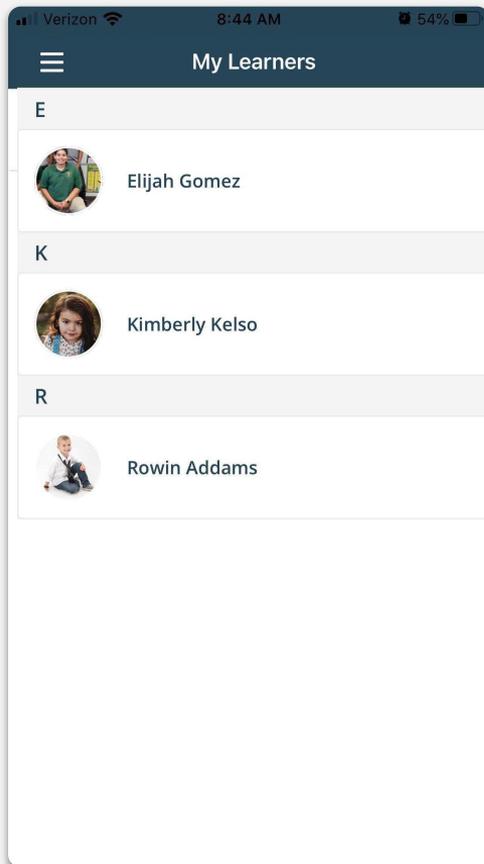
My Learners

My Learners provides access to the client's data and non data collection branches, for tracking of skill acquisition and behavior reduction goals in one centralized location.

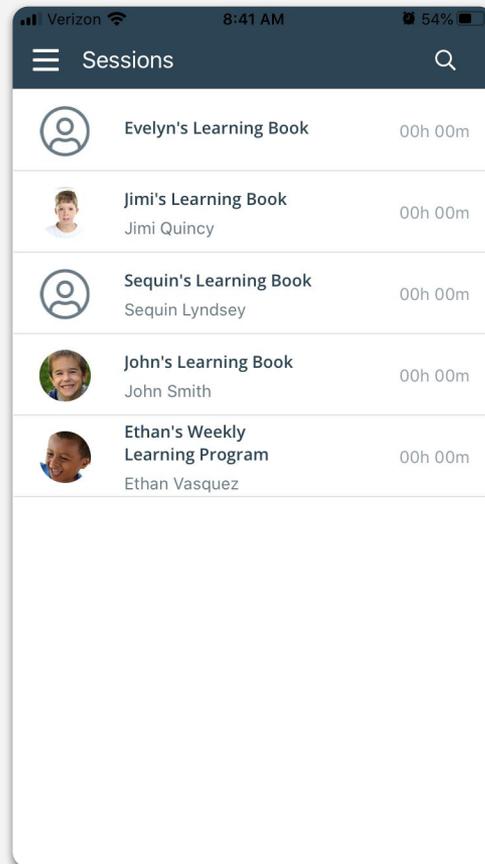
My Learners can be accessed from the main menu. Premium users can also access Learners from the Appointment Card.

Note: Criterion Advancement and Session Handoff are not supported on this version of CR Mobile.

My Learners
list of clients



Choose a client
to see their sessions

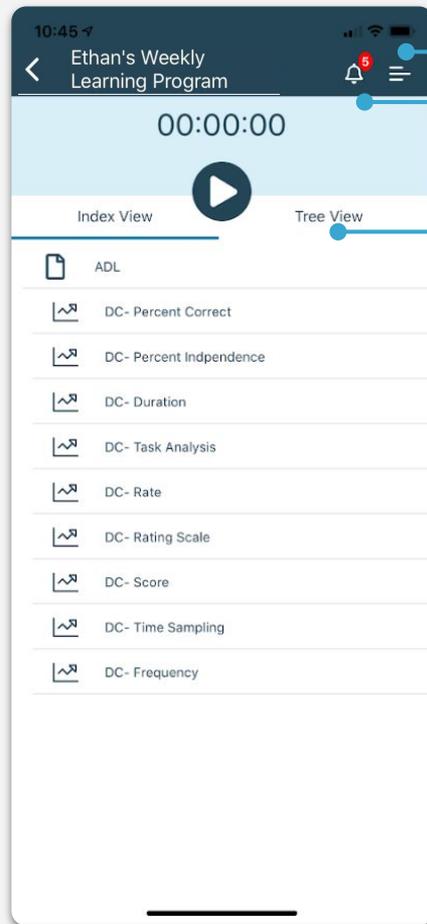


Sessions: Data Sheet

The Data Sheet shows all the targets/programs in the client's Data Sheet, and provides access to both data and non data collection branches.

Goals can be viewed as:

- Index View: displays targets with corresponding parent branch as ordered on the Session
- Tree View: displays targets as ordered in Learning Tree under the correspondent parent branch



Tap to access
NET view

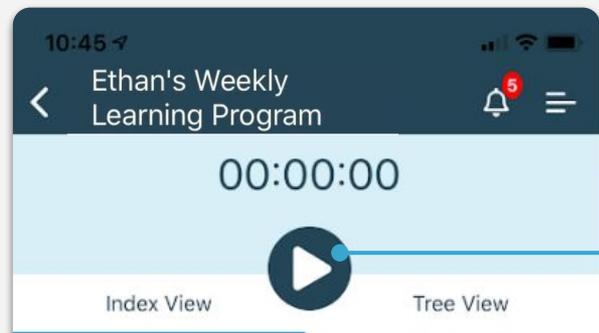
Tap to access
branches'
comments.
The red bubble
identifies new
unread comments.

Tap to view goals as a
Tree View

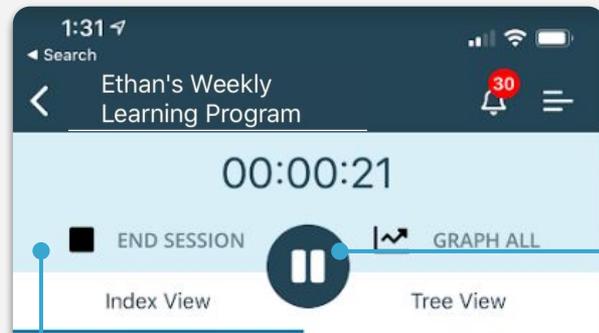
Sessions: Data Sheet Timer

The Data Sheet timer tracks the time spent working on the Data Sheet. You must tap **play** to start collecting data. Any data collected without starting the session will not sync to CentralReach.

Note: In this version of CR Mobile, the Session timer and the 'End Session' button are not connected to the appointment timer. Starting or pausing a Session does not Start/End an appointment.



Tap to start a Session

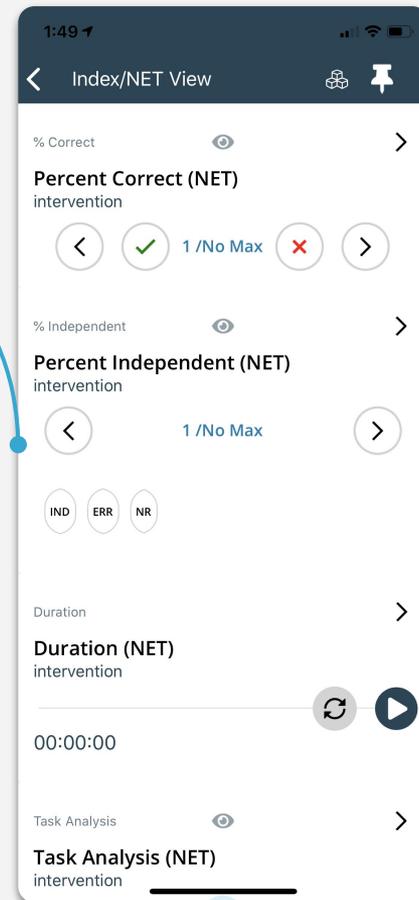
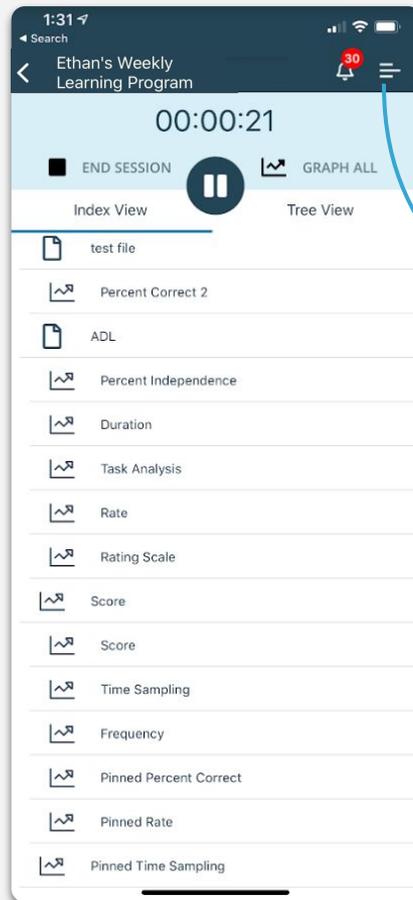


Tap to pause the Session

Tap to end the Session and clear the data (forfeit data without graphing)

Sessions: INDEX/NET View

Tap play and then tap the goal or the hamburger icon on top to start collecting data.



Sessions: INDEX/NET View

Collect data on the client's goals/targets.
Swipe up and down, find the program
you are working on and score your trials
or occurrences.

Note: "Trials" and "Routine" data types are not available in this version of CR Mobile.

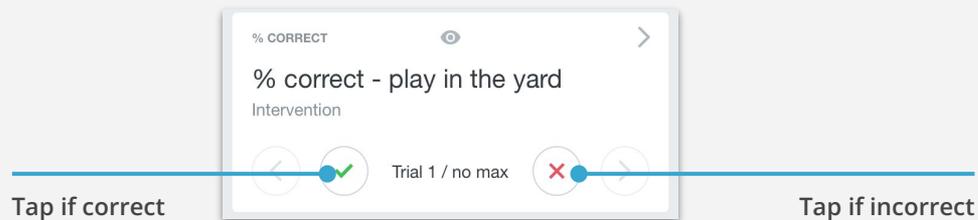
The screenshot shows the 'Index/NET View' interface on a mobile device. The screen displays a list of interventions with progress indicators. Annotations on the left and right sides point to specific UI elements:

- Data type:** Points to the '% Independent' label at the top of the first intervention card.
- Data collection phase:** Points to the 'DC- Percent Independence' text and the progress slider.
- Previous trial:** Points to the left arrow button and the '1/10' trial count.
- Completed trial x/out of total trials:** Points to the '1/10' trial count.
- Goal name:** Points to the 'DC- Duration' text.
- Tap to see trial by trial view:** Points to the 'Task Analysis' label and the right arrow button.
- Tap for goal details:** Points to the right arrow button at the top of the first card.
- Next trial:** Points to the right arrow button.
- Tap to record prompt response:** Points to the 'IND', 'ERR', and 'NR' buttons.
- Percent complete:** Points to the '0' value on the progress slider of the second intervention card.

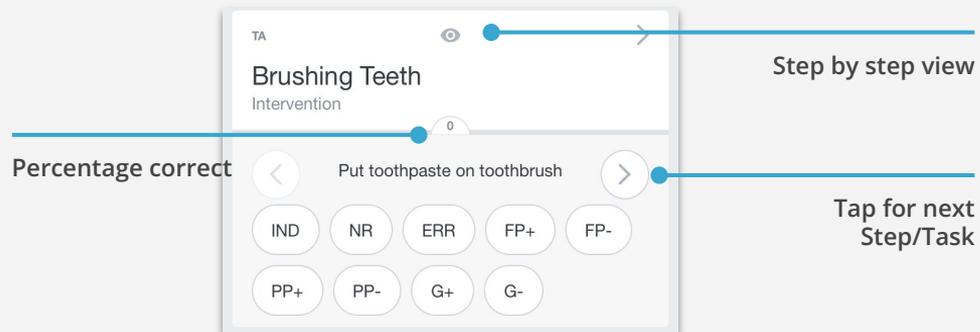
Sessions: Data Collection Types

- ABC data
- Percent correct
- Percent independent
- Task analysis - click the eye to see the current step in bold
- Frequency
- Rate
- Rating scale
- Duration
- Time sampling
- Score

Percent Correct



Task Analysis



Sessions: ABC Data Collection

To access ABC data collection, tap the ABC icon in the top right corner of the screen.

Then, choose one or more behaviors using your assigned ABC data templates.

Use single-select, multi-select, or free type to enter information on the behavior.

Tap **Save** to save your ABC data.

Note: To use ABC data collection, set up templates in CentralReach and add them to the client's Session.

The image displays three sequential screenshots of the ABC Data Collection app interface, annotated with blue lines and text boxes:

- First Screenshot (Index/NET View):** Shows the main menu with an ABC icon in the top right corner. An annotation points to this icon with the text "Tap to access ABC data collection".
- Second Screenshot (ABC Data Collection):** Shows a list of behaviors to be selected. Annotations include:
 - A bracket on the left side with the text "Choose 1 or more behaviors".
 - A line pointing to the "Continue (3)" button at the bottom with the text "Tap continue to enter data".
 - A line pointing to the "(3)" in the button with the text "Indicates number of behaviors selected".
- Third Screenshot (Behavior Selection):** Shows a form for entering behavior details. Annotations include:
 - A line pointing to a "+2" indicator at the top right with the text "Indicates number of behaviors selected".
 - A line pointing to a text input field with the text "If free text, type response".
 - A bracket on the right side with the text "If single select, tap one. If multiselect, tap all that apply.".
 - A line pointing to the "Save" button at the bottom with the text "Tap to save ABC data".

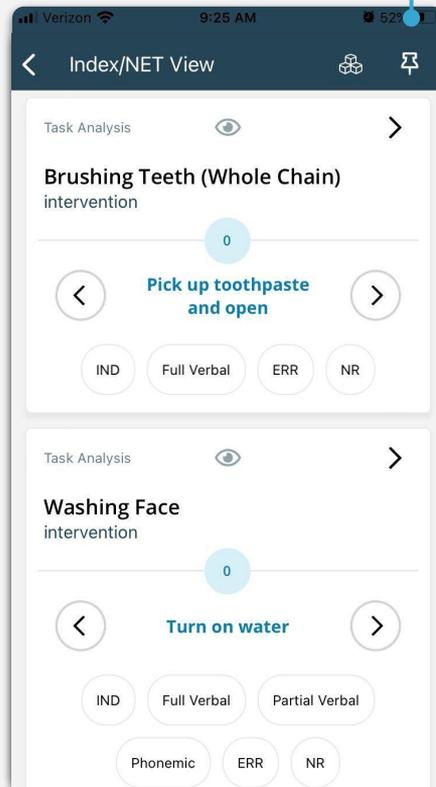
Sessions: Pinned View

Pinned View is available via the top right icon on Index/NET View and provides quick access to highly recurring behaviors.

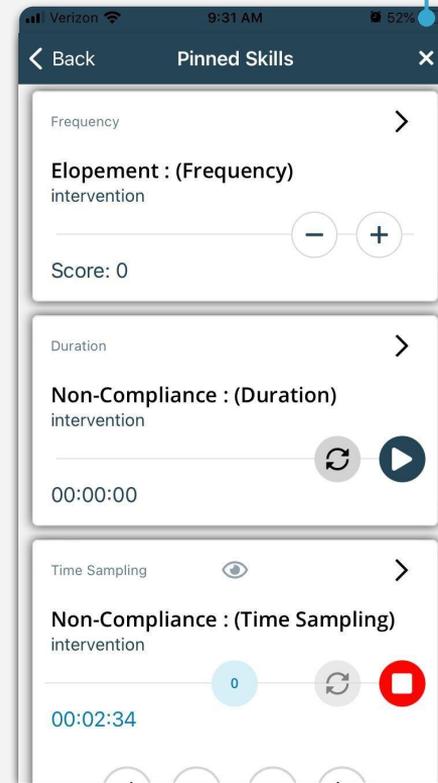
Tap the pin icon to open, then scroll to see all the pinned skills in the pinned view at once.

Tap **Back** or **X** to return to the previous screen.

Tap to access pinned targets



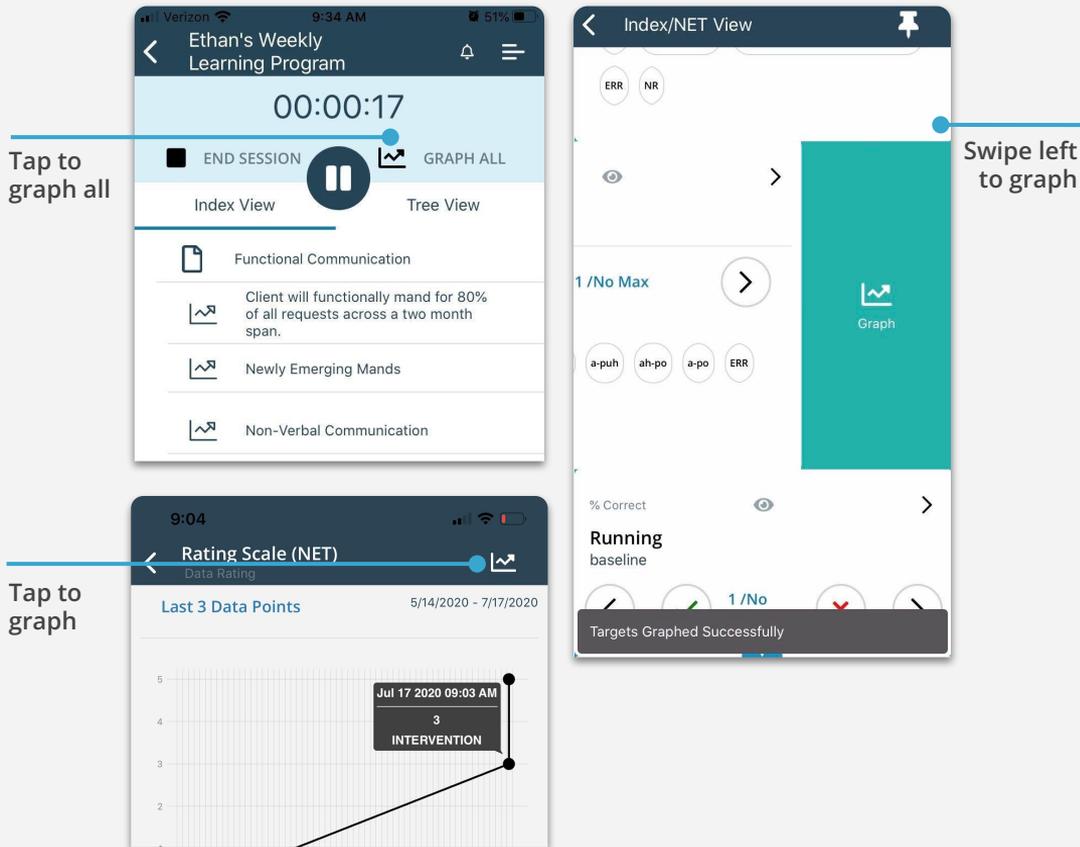
Tap Back or X to close pinned view



Sessions: Graph

To graph a goal, swipe left on the target in the Index/NET View, or tap the > icon next to the **goal name** and then tap the **graph** icon on the top right corner.

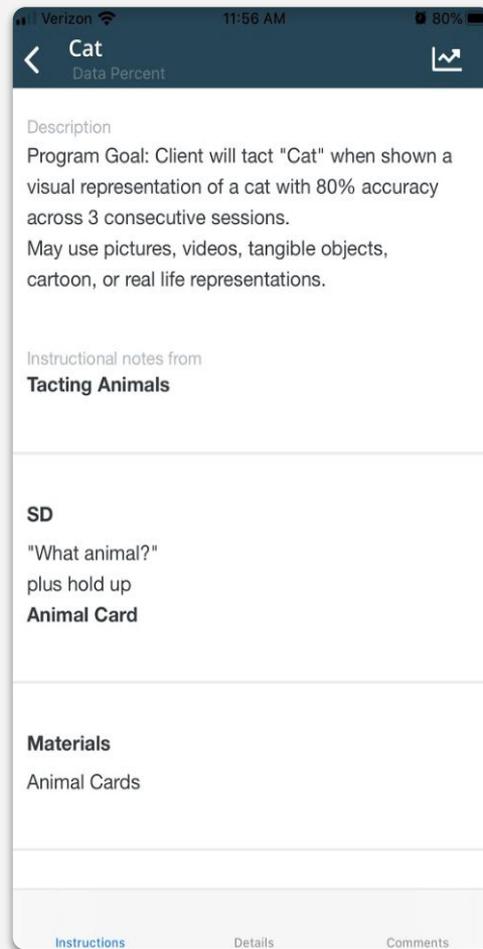
To graph in bulk, tap **Graph All** next to the timer on the Session's Data Sheet. If the data is not graphed, and the Session is paused, the data will be saved locally on the device until graphed. **If the data is not graphed, and you End Session, the data will be lost.**



Sessions: Target Instructions

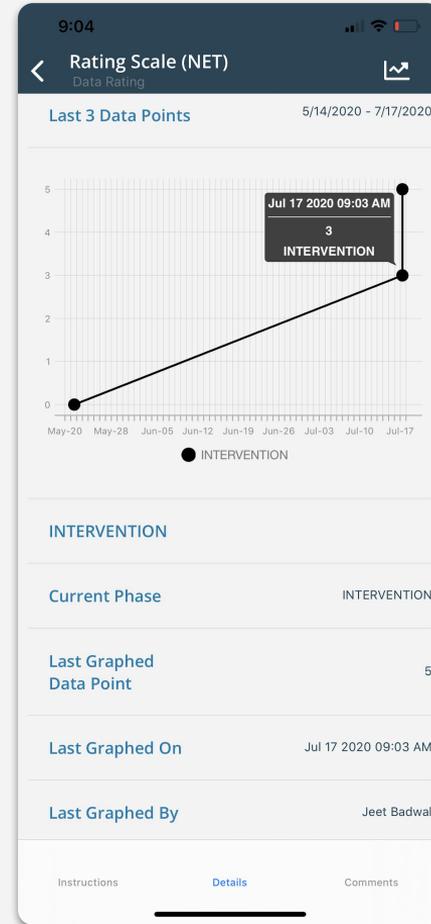
Any Instructions, Details and Comments can be viewed for each target in CR Mobile.

Instructions show the description of a target and accompanying Instructional Notes. Instructional Notes will be shown from parent goals.



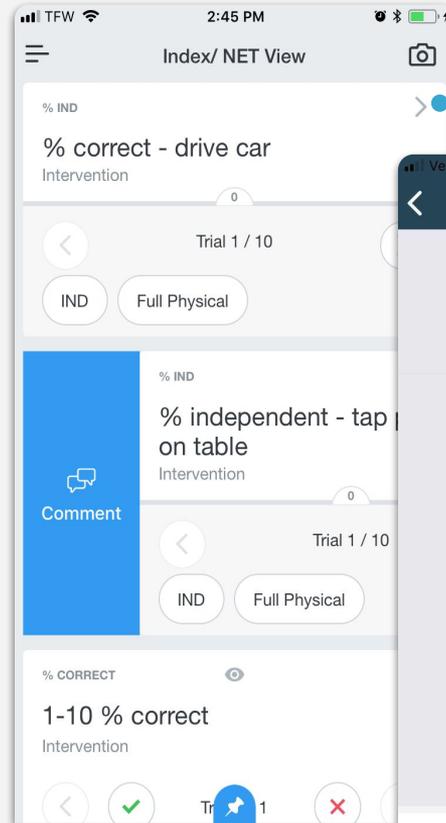
Sessions: Target Details

See the last 3 graphed data points on an improved interface. Tap the data point to see the date and time the data was captured, plus the phase and the score.

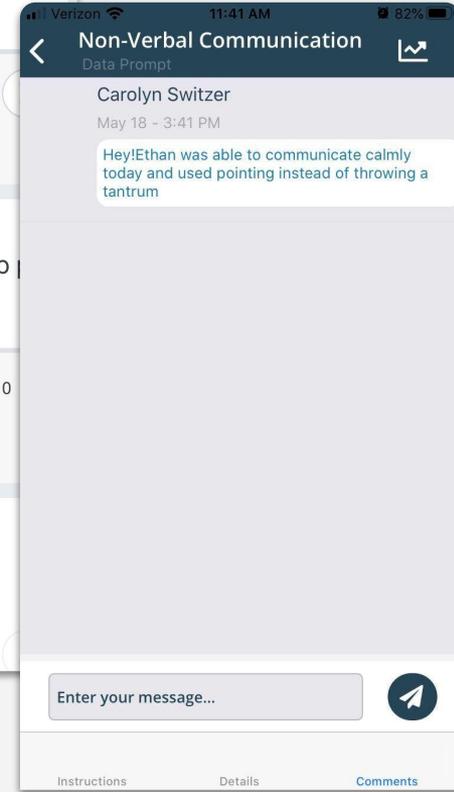


Sessions: Target Comments

Comments show all comments added pertaining the target. Comments can also be added by swiping right on the target. These comments are saved in the corresponding Learning Tree branch and Session.



Tap to type a comment.
Press enter to submit

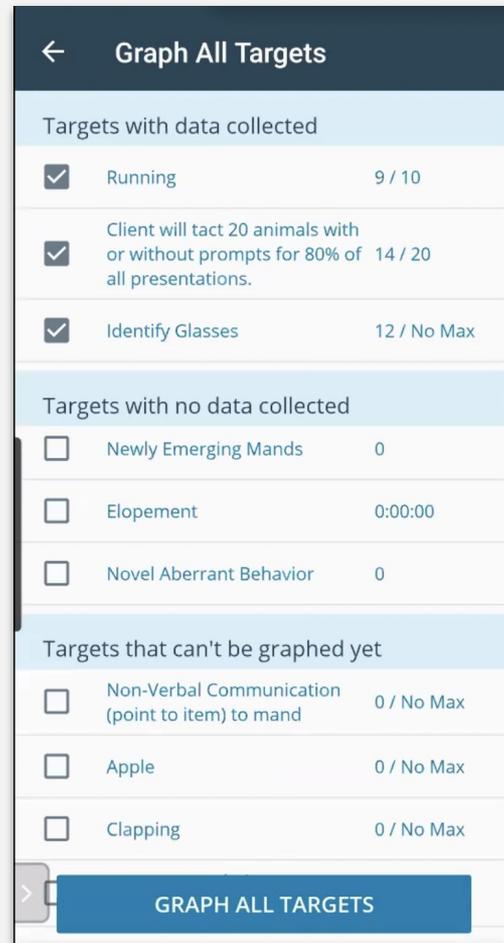
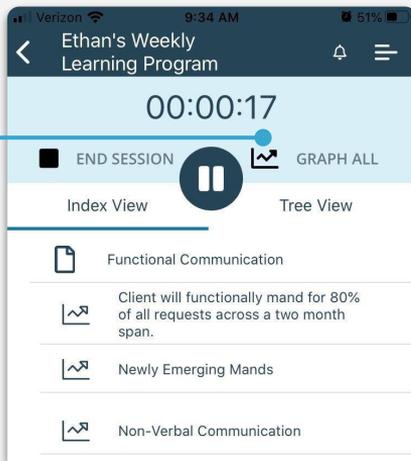


End Session

In order to successfully end a data collection session, touch **Graph All** choose the data to save and **Graph All Targets** which will save your data.

Then tap **End Session** which will stop your data collection session timer. Confirm **Yes**.

Tap to graph all

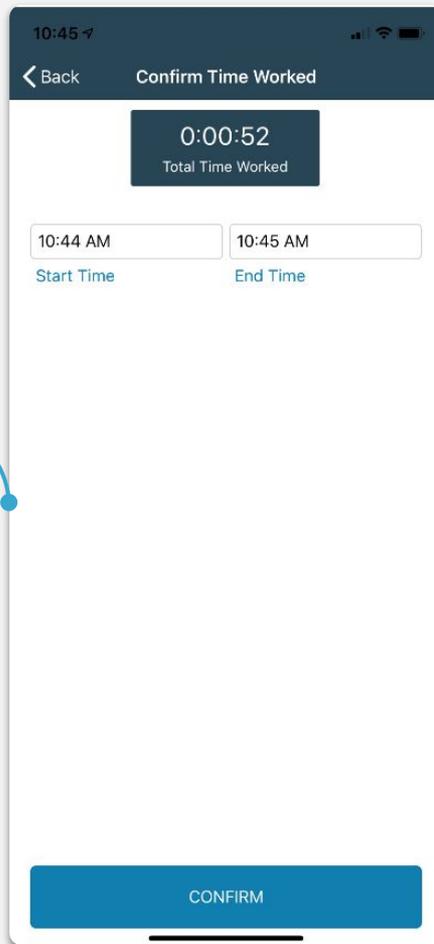
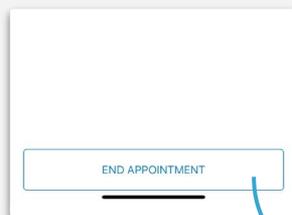


Completing the Appt: Session Notes & Last Steps

End Appointment

When ending the appointment, and after signatures are collected, providers will be view total time worked and can edit start/end time of non-EVV appointments. *For compliance purposes, start/end time **cannot** be modified on EVV appointments. This time worked will be populated on the draft timesheet in the CentralReach platform.*

Once the appointment ends, the appointment status will change to Appointment Completed. Please note that completing appointments does not graph data nor end a client Session in progress.

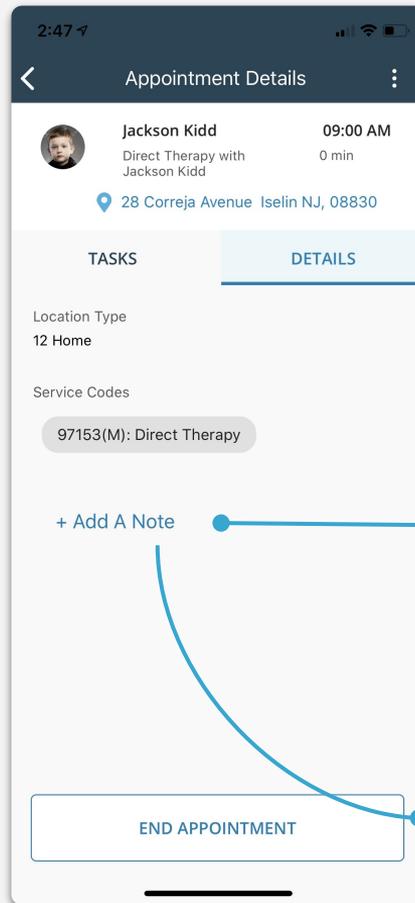


Tap to edit time

Notes

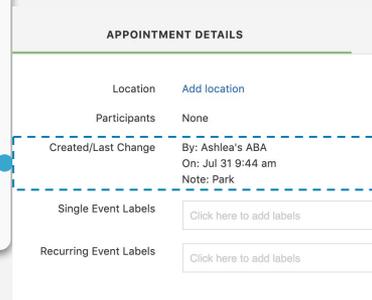
Enter Appointment Notes on the “Details” tab. These will be displayed on the Appointment Details Popup, under “Created/Last Change” on the CentralReach web application.

Please note this is not a Session Note. Session Notes are to be completed after the session on CR Mobile, or optionally on the CentralReach web platform.



Tap to add a note

Appointment Details Popup



Complete Session Note

After the appointment is ended, the Session Note(s) will appear. The system will prompt you to complete Session Note(s) before continuing, but you may click 'Continue' and complete notes later in Draft Timesheets.

Note: Session Notes will only appear on CR Mobile if set up by an administrator on the CentralReach web platform. These Session Notes may be completed on CR Mobile, or optionally in the Draft Timesheets on the CentralReach web version.

The asterisk * indicates a required note.

Tap Continue to complete notes later or on the browser.

2:00 LTE

Back Session Notes

Direct Therapy

- 97153 - FL
- CR Mobile Demo/Training *

Please complete all required Session Notes before continuing.

Continue

11:03

Session Note

Session Summary

- Caleb's Data Sheet 00:01:08

Session Information

Was the parent or guardian present? *

Yes

What procedures were used?

- DTT
- NET
- Prompting
- Video Modeling
- Behavior Contract
- Reinforcement

Signatures >

Save & Attach

Confirm Appointment

After you **Save & Attach** the Session Note, the CR Mobile app will display a short appointment summary. Tap **Confirm** to complete the workflow.

If you are offline, appointment and session information will be securely stored on your device until you connect (or reconnect) to the internet. Then, it will sync back to CentralReach.

Behavior Contract

Reinforcement

Signatures >

Save & Attach

11:03

< Back Appointment Summary

00 : 02
Hours Minutes
11:01 AM - 11:03 AM

Client Information ▾

Signatures Captured ▲

Client Signature Provider Signature

● Session Note ▾

CANCEL CONFIRM

Tap Confirm to complete finish the workflow.

If Required:

Finishing on the Web Platform

An alternative workflow if additional steps, such as EVV exceptions, are required to be completed on CR web platform.

Finishing Your Appointment Draft Timesheets

If your timesheet requires additional steps, such as completing EVV reason codes or adding a session note, it will appear in **draft timesheets** on the CentralReach web platform.

If your timesheet is complete — no exceptions or further steps — it will **automatically convert to a billing entry**.

Note: Never convert a CR Mobile appointment from the calendar. Always go to \$ > Draft Timesheets to view/complete appointments.

Filters and search available

On CentralReach's web platform, navigate to \$ > Draft Timesheets, then select the appointment date.

APPOINTMENT DATE	TIME
10/22/2020	10:08 am - 10:13 am
10/22/2020	03:50 pm - 03:53 pm

Finishing Your EVV Appointment Draft Timesheets

For EVV requirements, you will need to select a reason code + type in notes, such as the actual start/stop time or the actual alternative location. CentralReach EVV reason codes map to the various state reason codes.

For other requirements, simply type in the information needed.

Only users with the proper permissions can submit, but all users with access should be able to update the draft.

The screenshot shows the 'Edit Timesheet' screen in a mobile application. At the top, there is a navigation bar with a hamburger menu, a dollar sign, and utility icons. Below the navigation bar, the title 'Edit Timesheet' is displayed. A red circle with the number '1 (3)' indicates three missing requirements. The user's name 'CALEB DAVIDSON (CLIENT ID: 1261417)' is shown. A red 'X' icon and the text '97153: (3 Missing Requirements)' are displayed. The main content area contains three error messages, each with a red circle and a number:

- 1 Service address is required.
- 2 The appointment service address has not been validated. To avoid this error, please update the appointment service address. Please review and enter an appropriate reason code.
- 3 Location was not captured on the mobile device. Please review and enter an appropriate reason code.

Each error message has a corresponding dropdown menu to select a reason code. The second dropdown menu is currently selected, showing 'CR01 : Missing or incorrect address on appointment'. Below the dropdown menu is a text input field labeled 'Please add reason notes'. At the bottom of the screen, there is a 'Provider' section with the name 'Ashlea's ARA' and four buttons: 'DELETE DRAFT', 'CANCEL', 'UPDATE DRAFT', and 'SUBMIT'.

Annotations on the right side of the screenshot:

- 'Select a reason code for EVV exceptions' points to the dropdown menu for error 2.
- 'Type details.' points to the text input field for error 3.
- 'Complete required fields + have permission to submit.' points to the 'SUBMIT' button.

Finishing Your Session Note

Draft Timesheets

Session Notes may be completed on the CentralReach web platform.

After going to the \$ Billing module > Draft Timesheets and selecting your timesheet, use the dropdown to select and create a session note on the web browser.

Click the dropdown to select & create a session note.

Only use this area if your organization requests, or the above Session Notes section does not populate.

Finishing Your Session Note

Draft Timesheets

Complete your session note as per usual in the Draft Timesheet. Click **Save & Close** when finished.

CAN EDIT

Appointment Information Section PRESET

Appointment date: 05/17/2021 Start time: 01:00 PM End time: 02:00 PM Duration: 60

Bill code: 97153 Total # of units: 1

Location of service: Home

Session Summary PRESET

SELECT SESSION SUMMARY

Session Information

Was the parent or guardian present?

Yes No

What procedures were used?

DTT NET

CLOSE SAVE & CLOSE

Complete all required areas.

Save & Close when finished.

Editing Your Session Note Draft Timesheets

If required and the appropriate permissions are granted, you may be able to edit and/or delete a session note. *If the Session Note is edited or deleted, client and provider signatures will need to be collected again.*

A phone or computer icon indicates whether a session note was completed by CR Mobile, or on the web version.

Authorization 97153: EVW

Pointer #1 #2 #3 #4

Time Worked 01:00 PM 02:00 PM America/New_Yc

Units of Service 1 Recalculate

Service address 17221 Gunn Highway Odessa, FL 33556

Provider Pay \$ Rate 6 \$ Drive 0 \$ Miles 0

Client Rate \$ Rate 6 \$ Drive 0 \$ Miles 0

Agreed Rate \$ Rate 6

SESSION NOTES
Create session note...

Session Note

Session Note
Created on 05/17/21 at 1:19 PM by Ashlea's ABA

Can Edit

FILES
browse system files
UPLOAD NEW FILE

CR SAMPLE: SESSION (1/1)
optional
NEW NOTE
SELECT EXISTING NOTE

SIGNATURES
CLIENT SIGNATURE
PROVIDER SIGNATURE

CANCEL SUBMIT

Indicates whether completed by Mobile or web.

Use the pencil to edit, and the trash can to delete.

Click "submit" when finished.