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	x	✔
	Client Address Map View	x	✔
	Mobile Session Notes	x	✔
	Electronic Visit Verification (EVV)	x	✔

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-EVV 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.

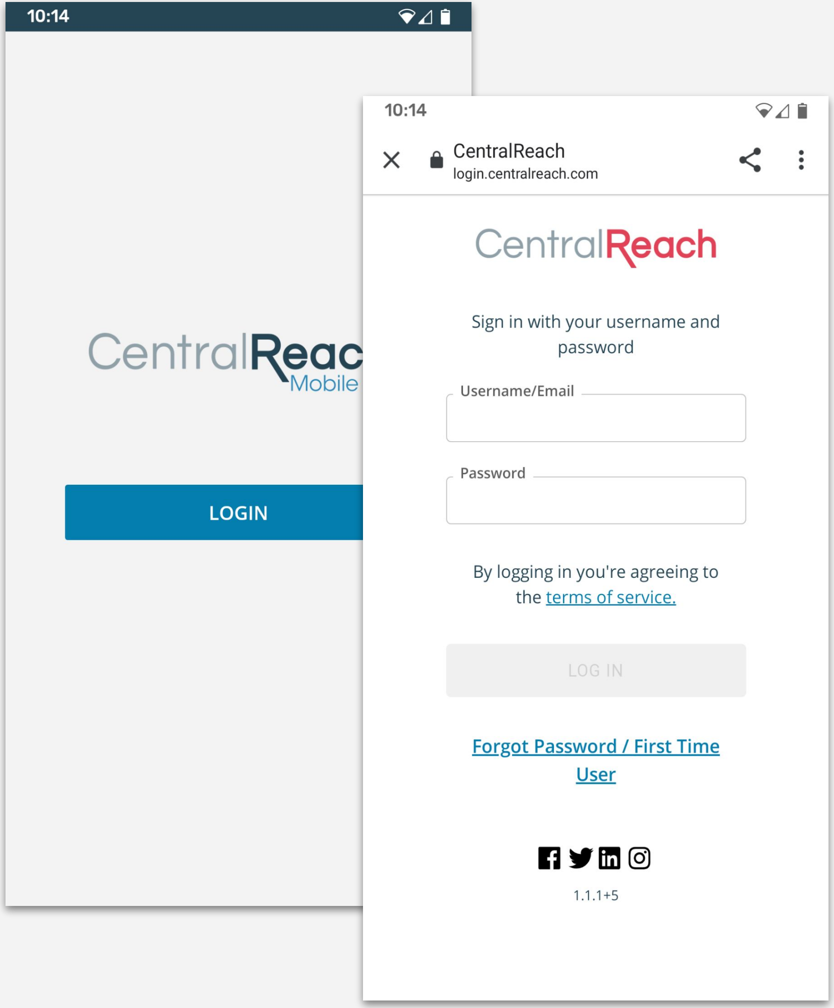
User Access:

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.



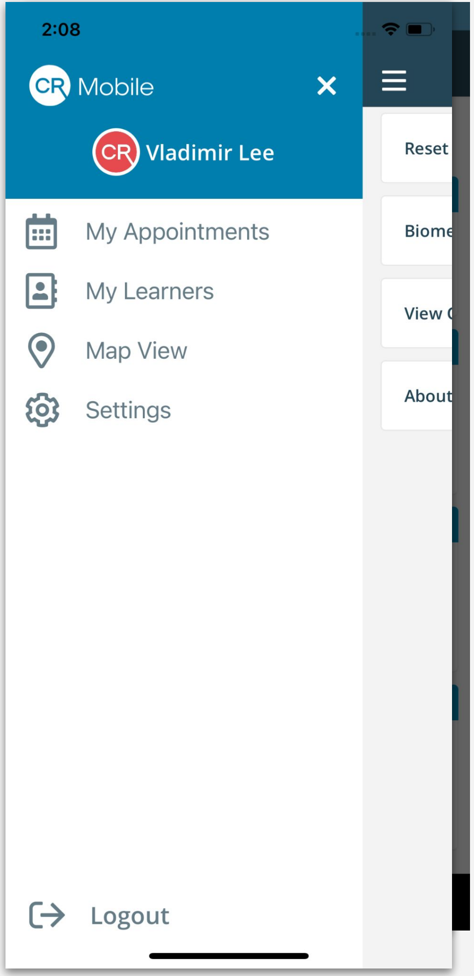
Main Menu

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 recommended checking to ensure that your appointment(s) and session(s) have downloaded prior to going to offline.



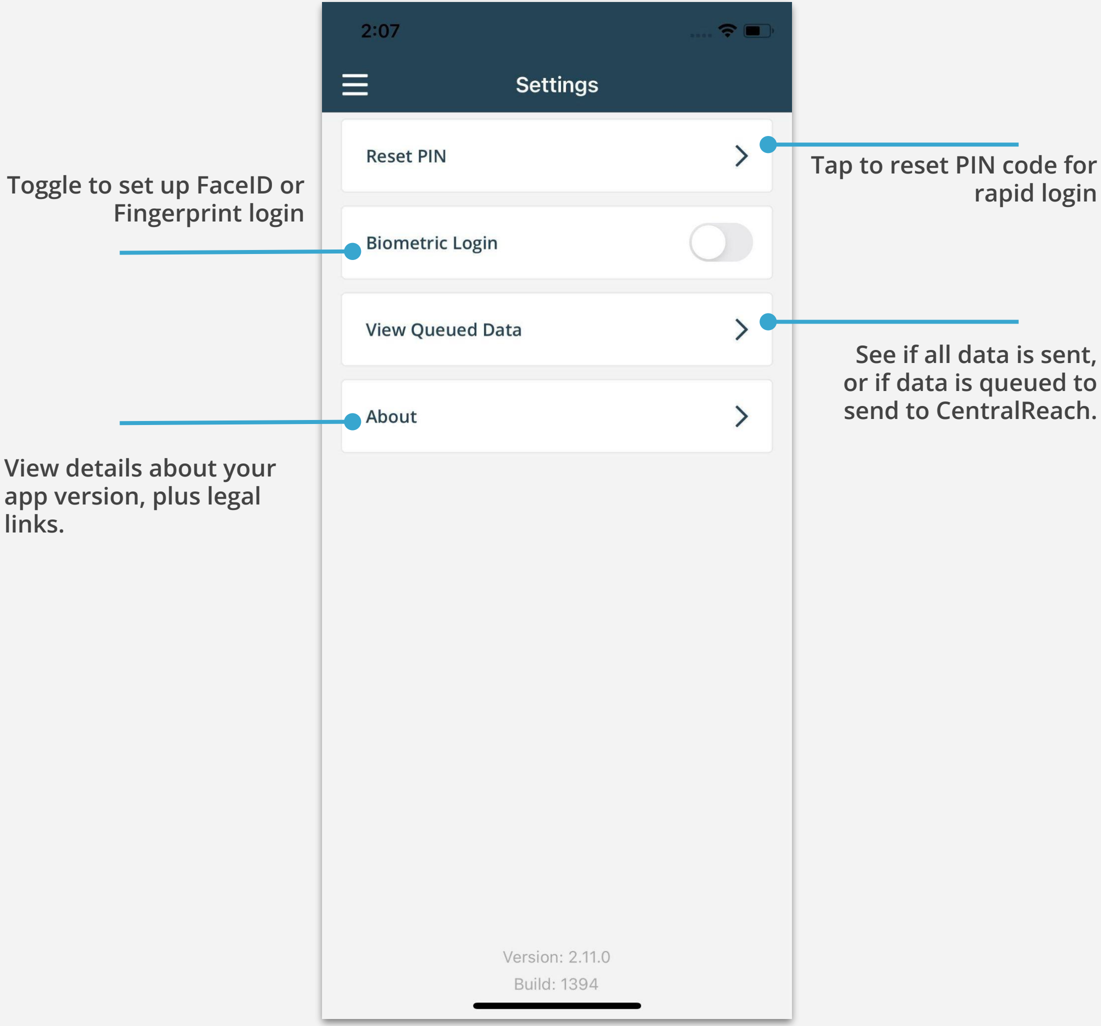
Main Menu

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

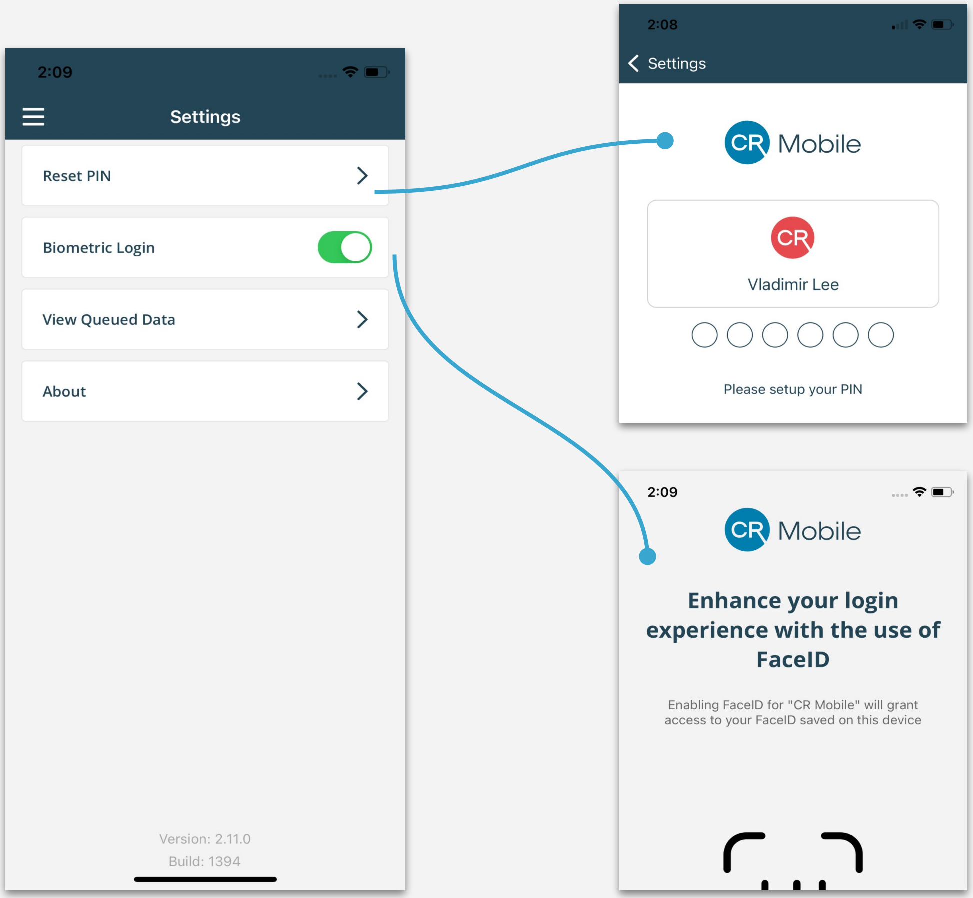
Note: We recommended checking to ensure that your appointment(s) and session(s) have downloaded prior to going to offline.



Resetting Your Pin & Biometrics Login

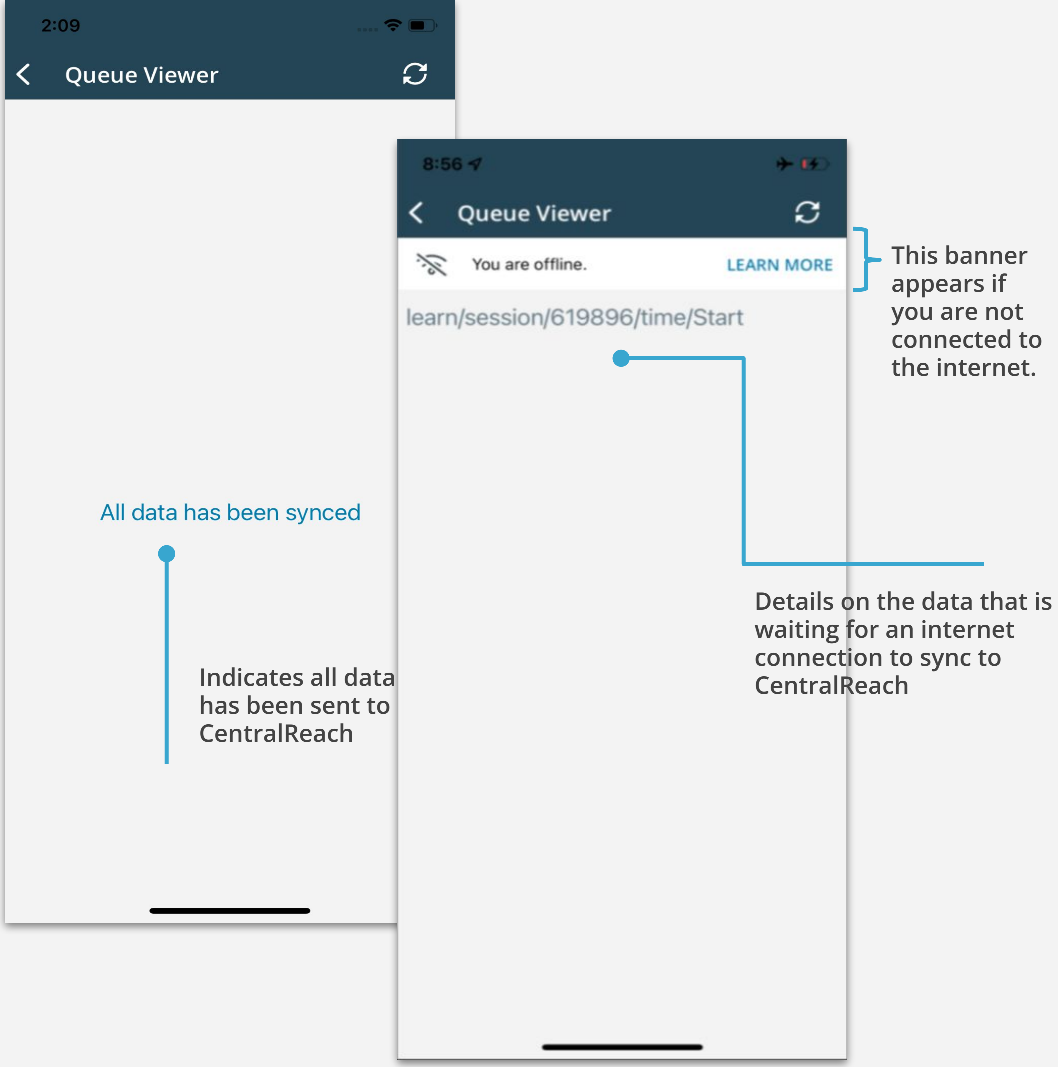
Reset PIN allows users to reset the quick PIN code that supports rapid login.

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.



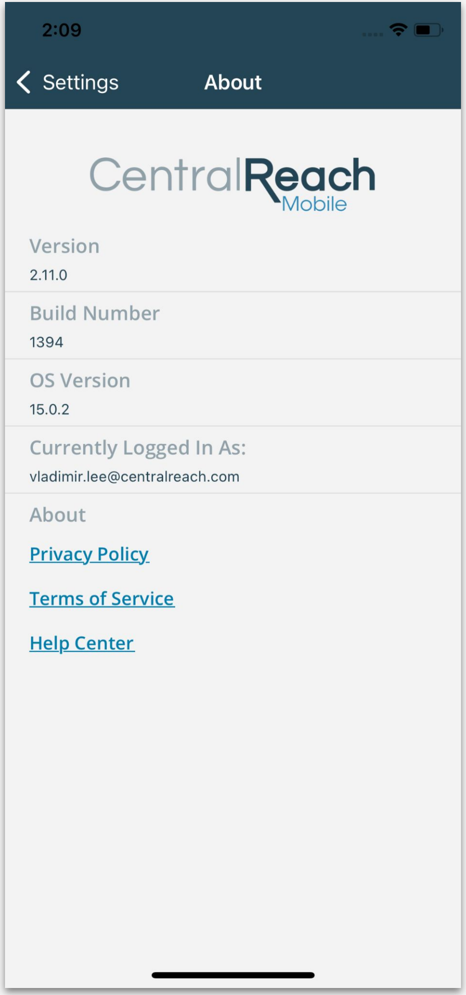
View Queued Data

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.



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

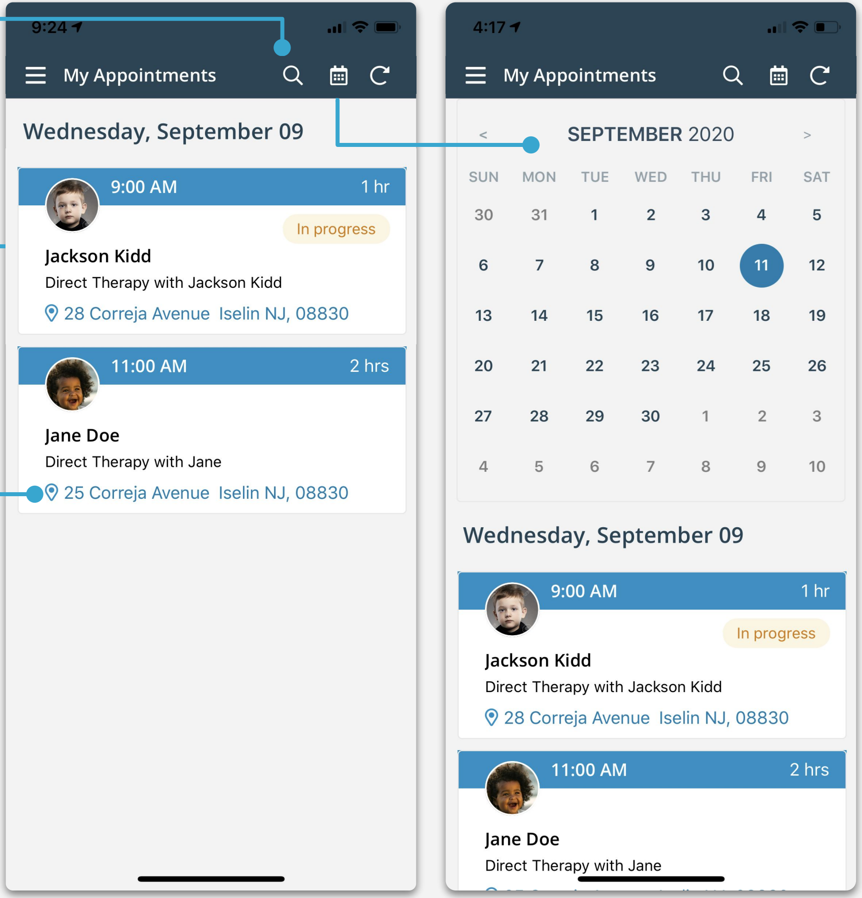
When accessing My Appointments providers will land on the current date to view appointments already booked and other information including:

- 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

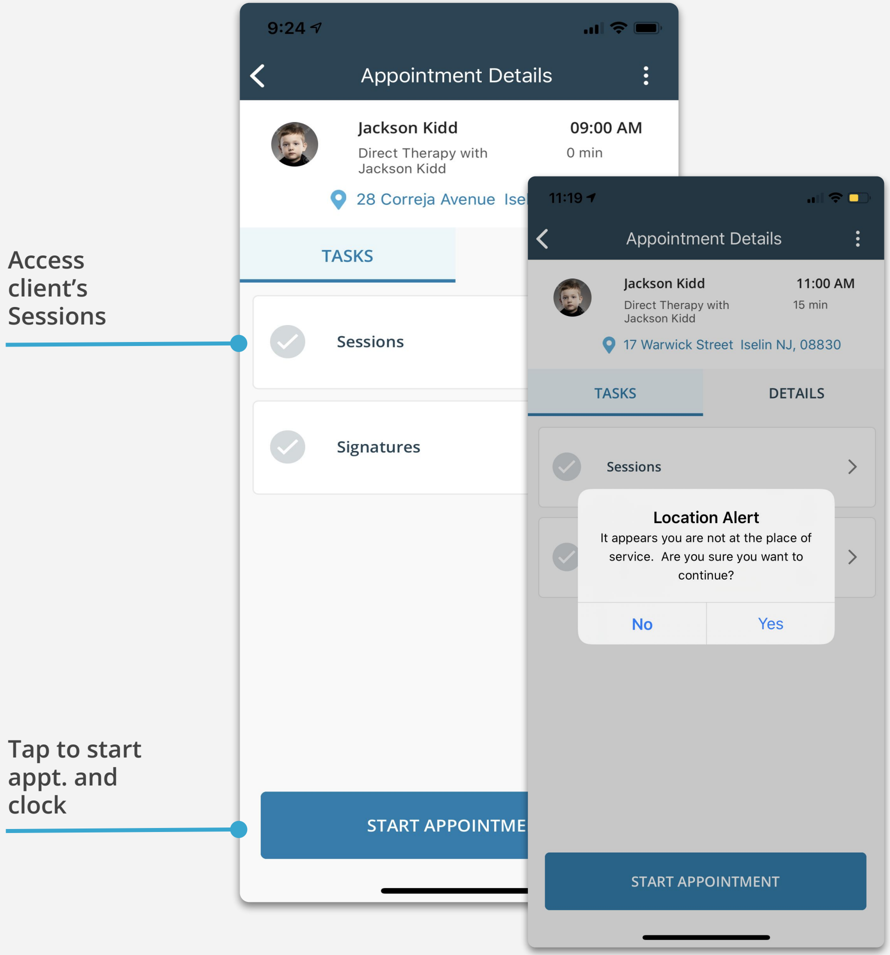


Tap to select date

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.



My Learners:

Collecting ABA Data

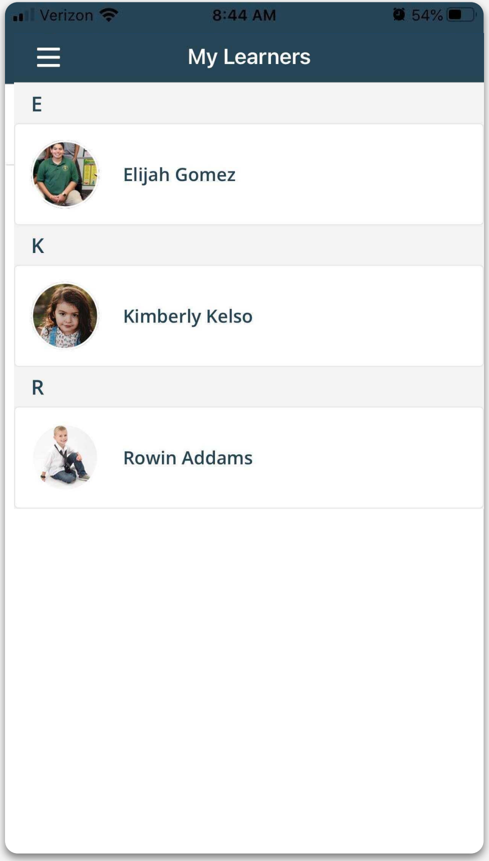
My Learners

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.

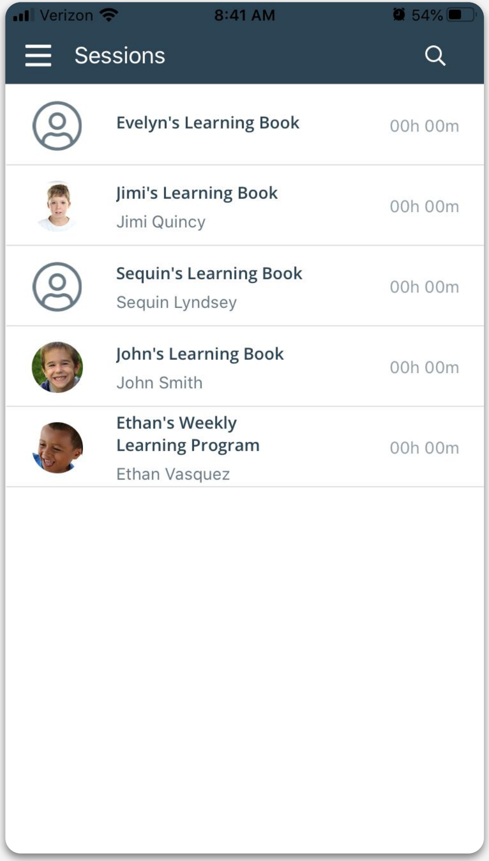
My Learners can be accessed from the main menu. Premium users can also access Learners from the Appointment Card.

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

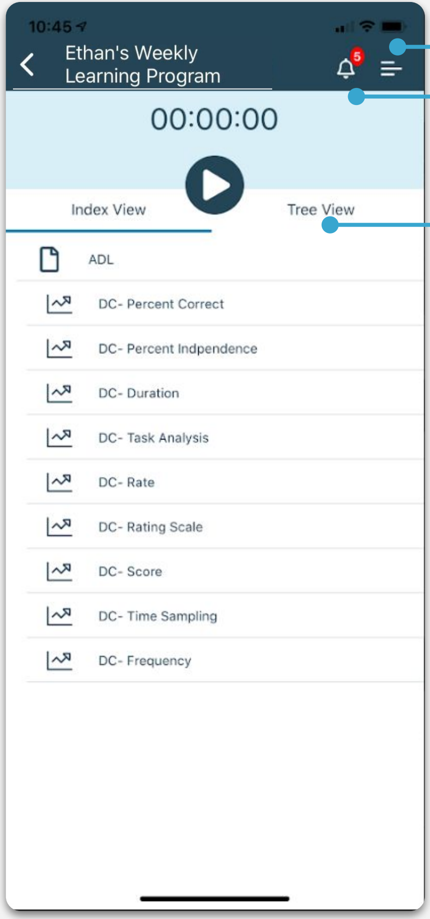


Sessions:
Data Sheet

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



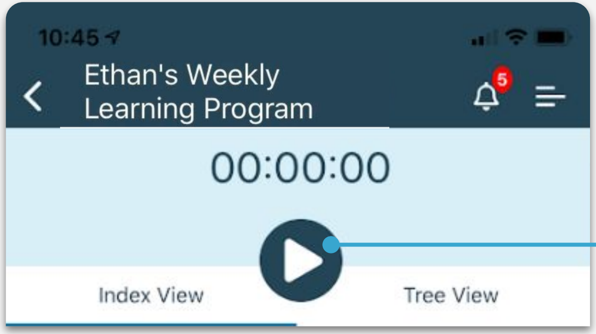
Tap to access NET view

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

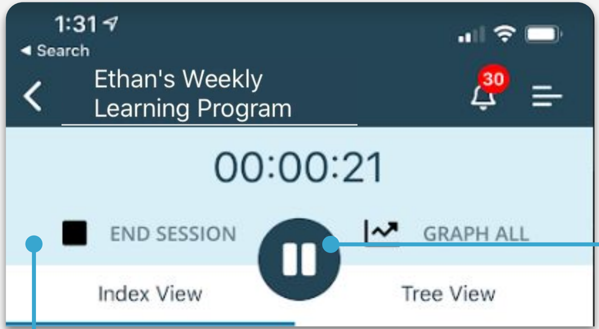
Tap to view goals as a Tree View

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.



Tap to start a Session



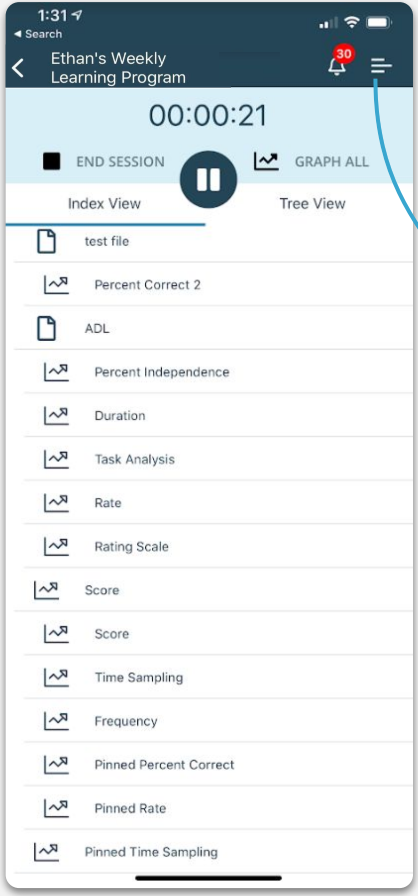
Tap to pause the Session

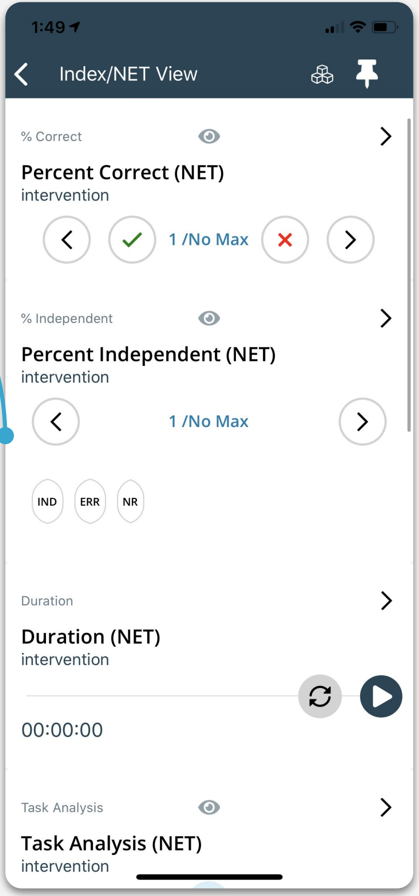
Tap to end the Session and clear the data (forfeit data without graphing)

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.

Sessions:
INDEX/NET View

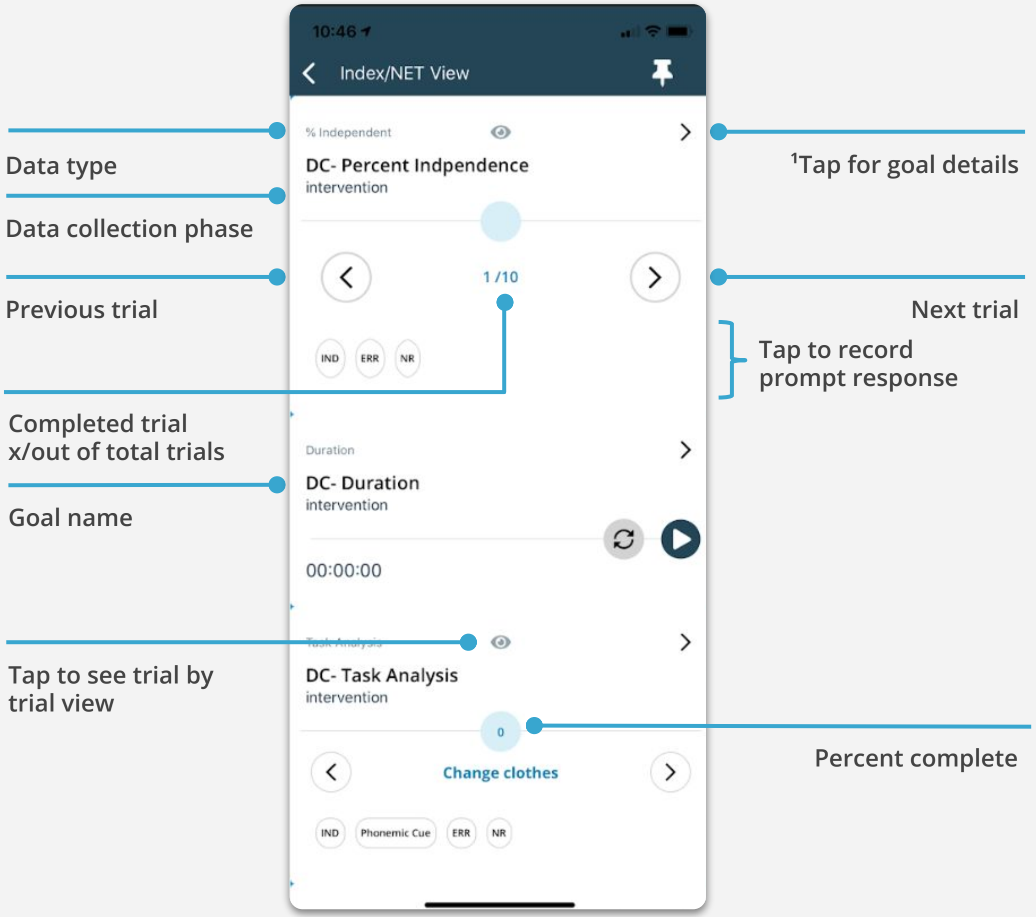
Tap play and then tap the goal or the hamburger icon on top to start collecting data.





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.

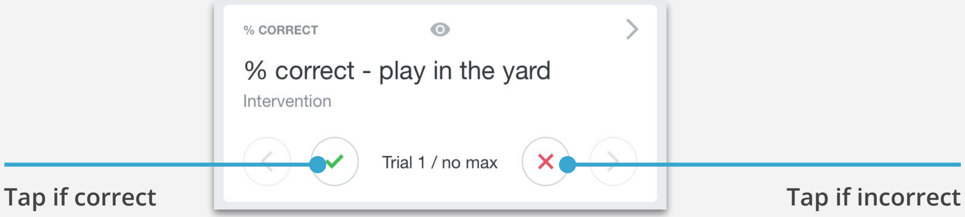


Note: "Trials" and "Routine" data types are not available in this version of CR Mobile.

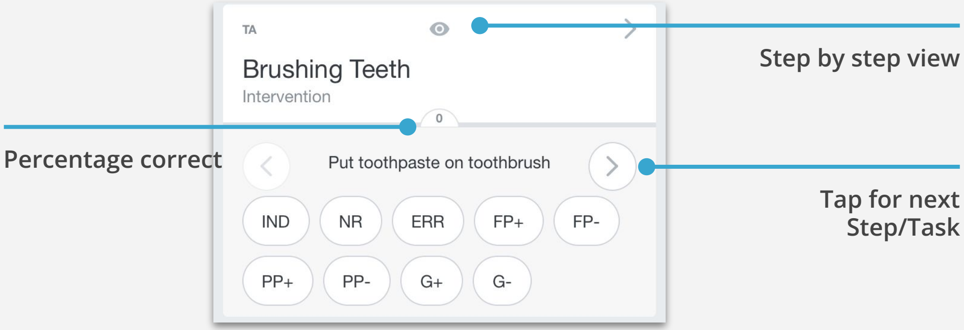
Sessions:
Data Collection Types

- 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

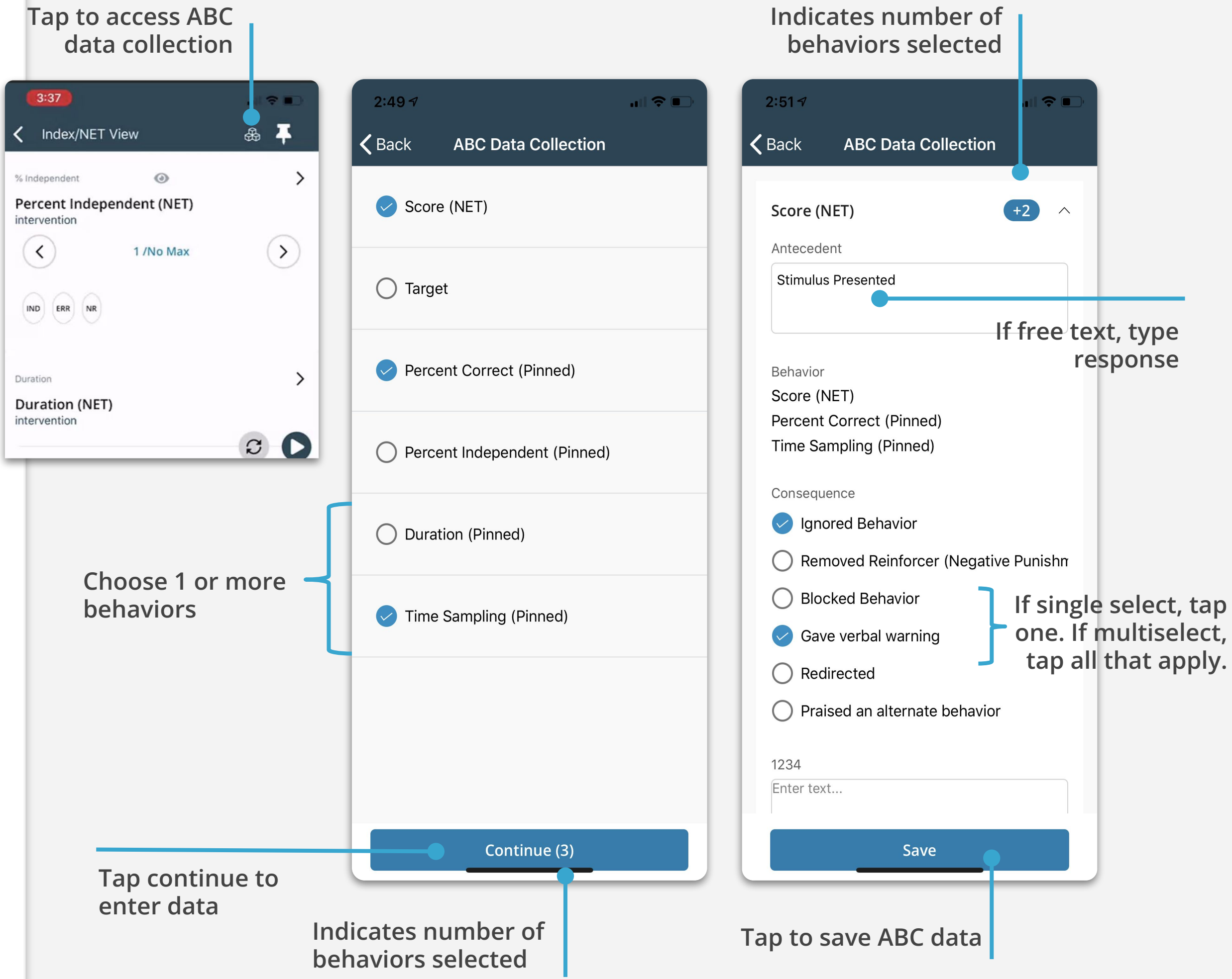
To access ABC data collection, tap the ABC icon in the top right corner of the screen.

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.



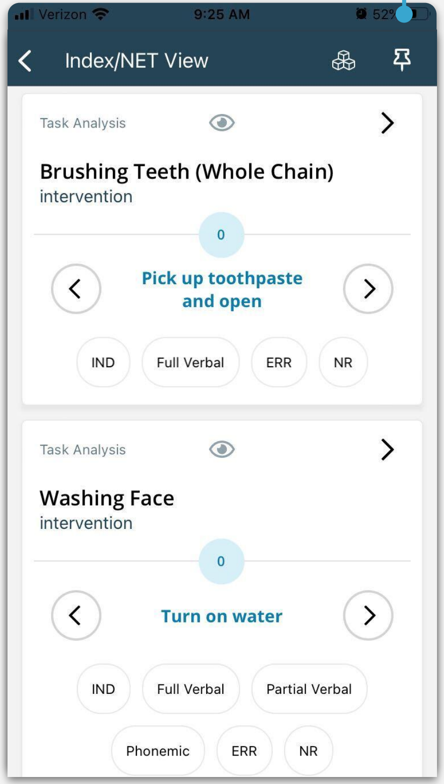
Sessions:
Pinned View

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

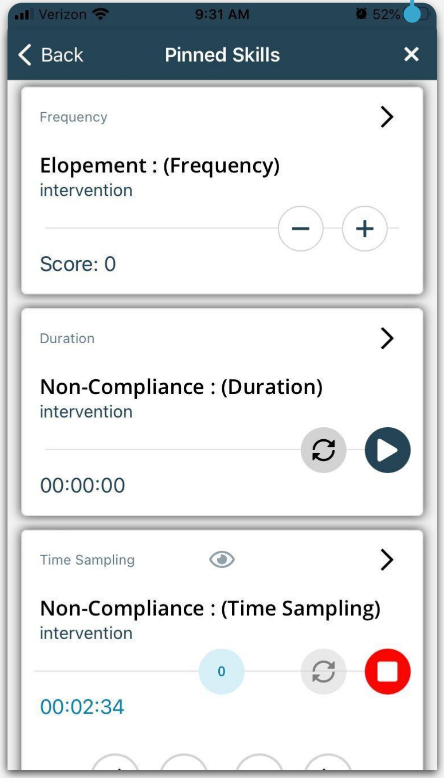
Tap the pin icon to open, then scroll to see all the pinned skills in the pinned view at once.

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

Tap to access pinned targets



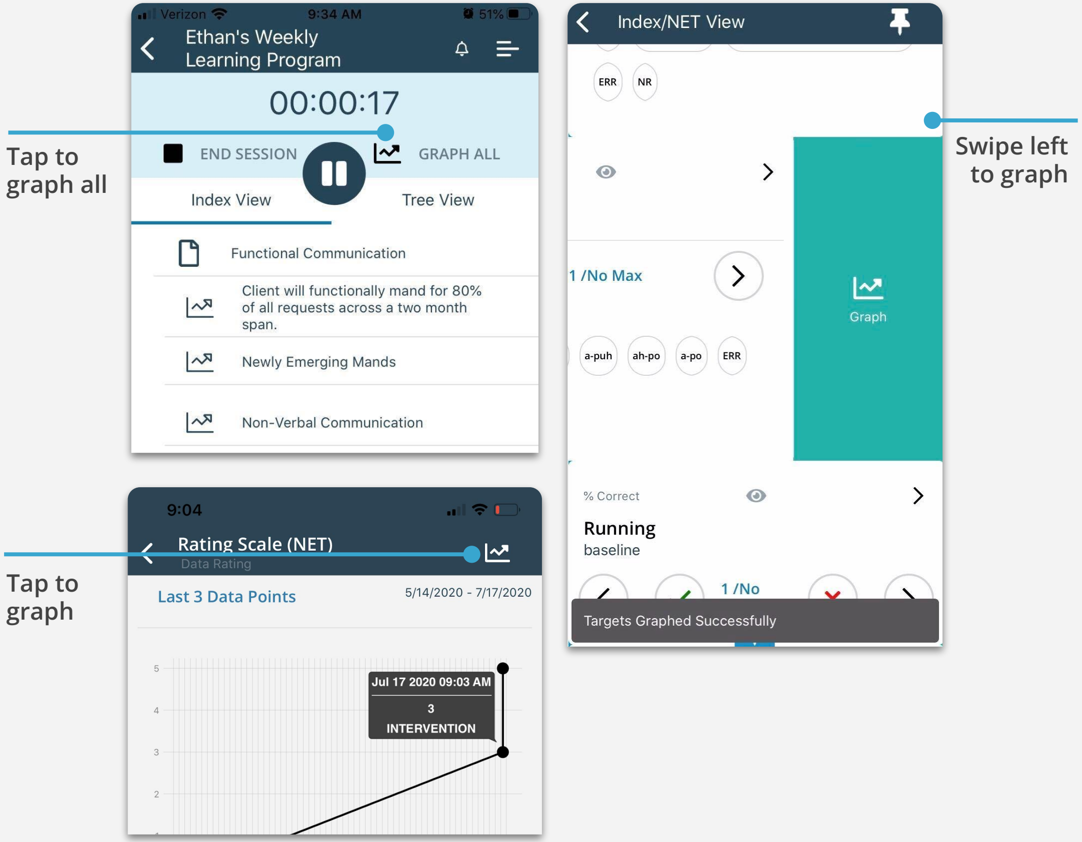
Tap Back or X to close pinned view



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.

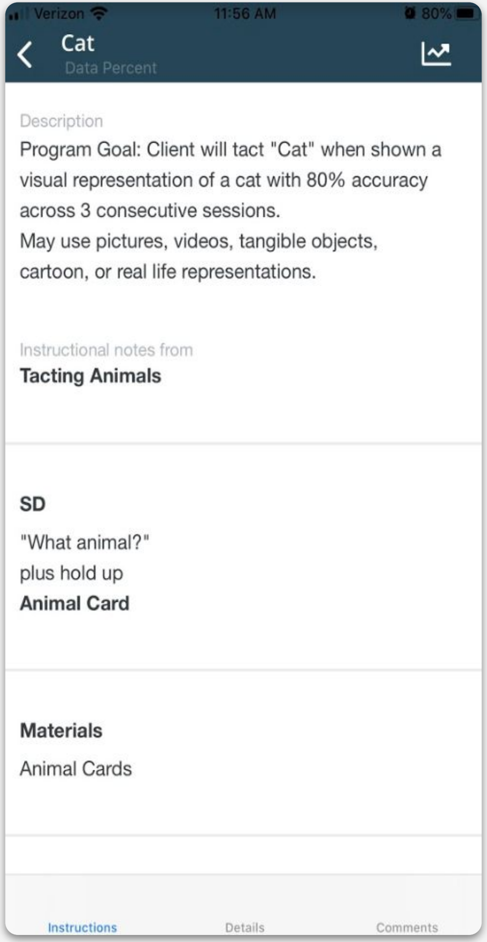
To graph in bulk, tap **Graph All** next to the timer on the Session's Data Sheet. If the data is not graphed, and the Session is paused, the data will be saved locally on the device until graphed. **If the data is not graphed, and you End Session, the data will be lost.**



Sessions:
Target Instructions

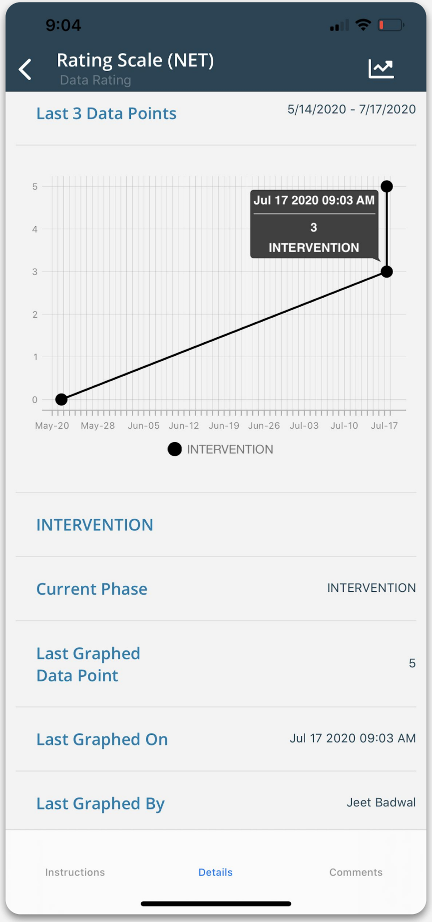
Any Instructions, Details and Comments can be viewed for each target in CR Mobile.

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



Sessions:
Target Details

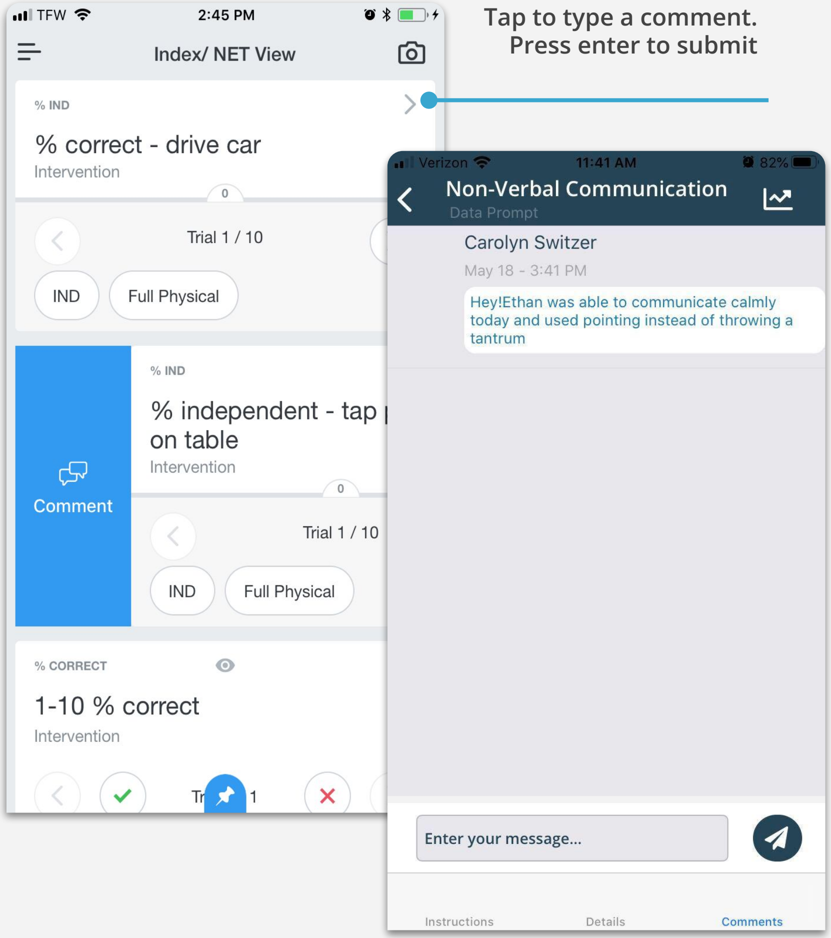
See the last 3 graphed data points on an improved interface. Tap the data point to see the date and time the data was captured, plus the phase and the score.



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 target. These comments are saved in the corresponding Learning Tree branch and Session.

Tap to type a comment.
Press enter to submit

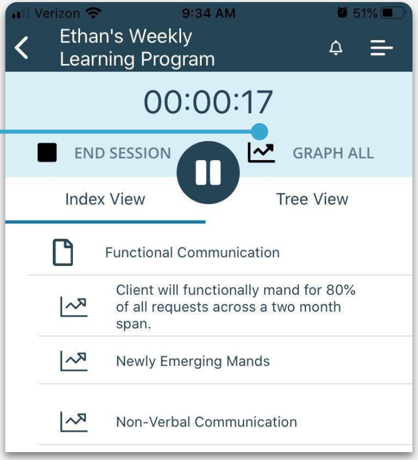


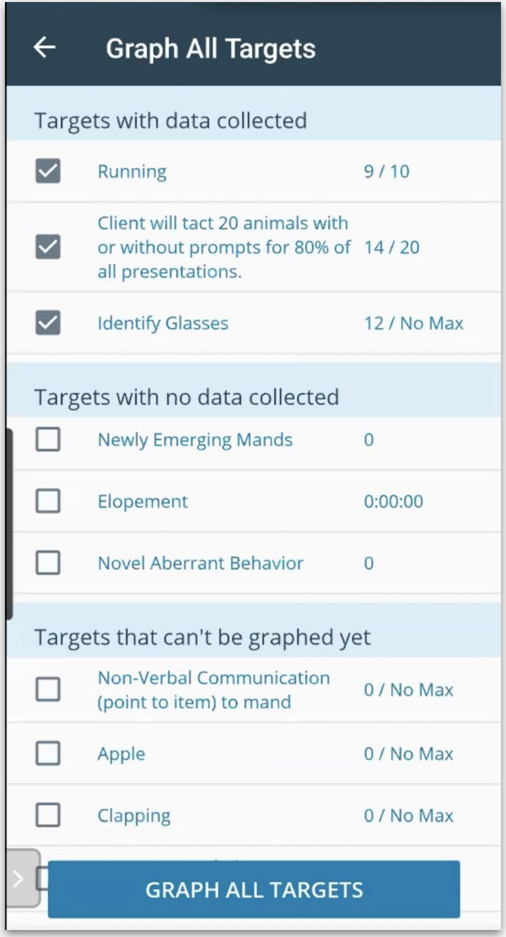
End Session

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



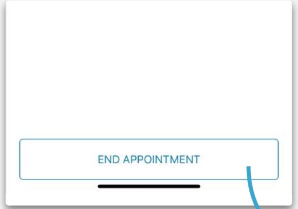


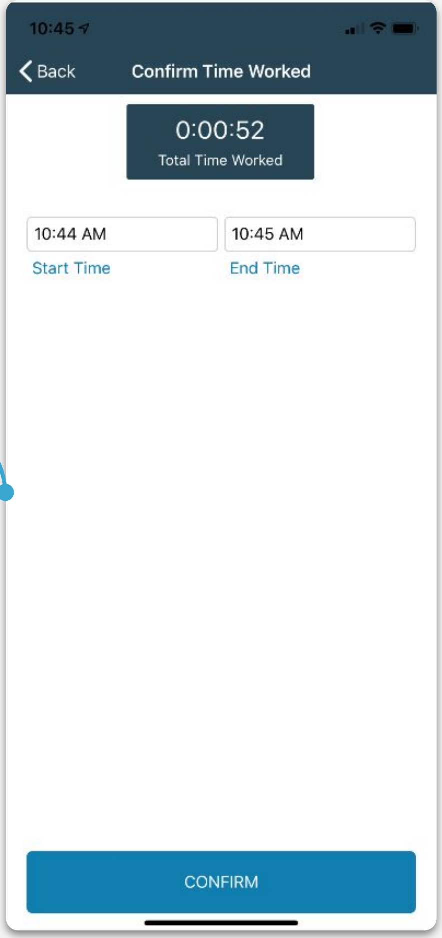
Completing the Appt:
Session Notes & Last Steps

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.



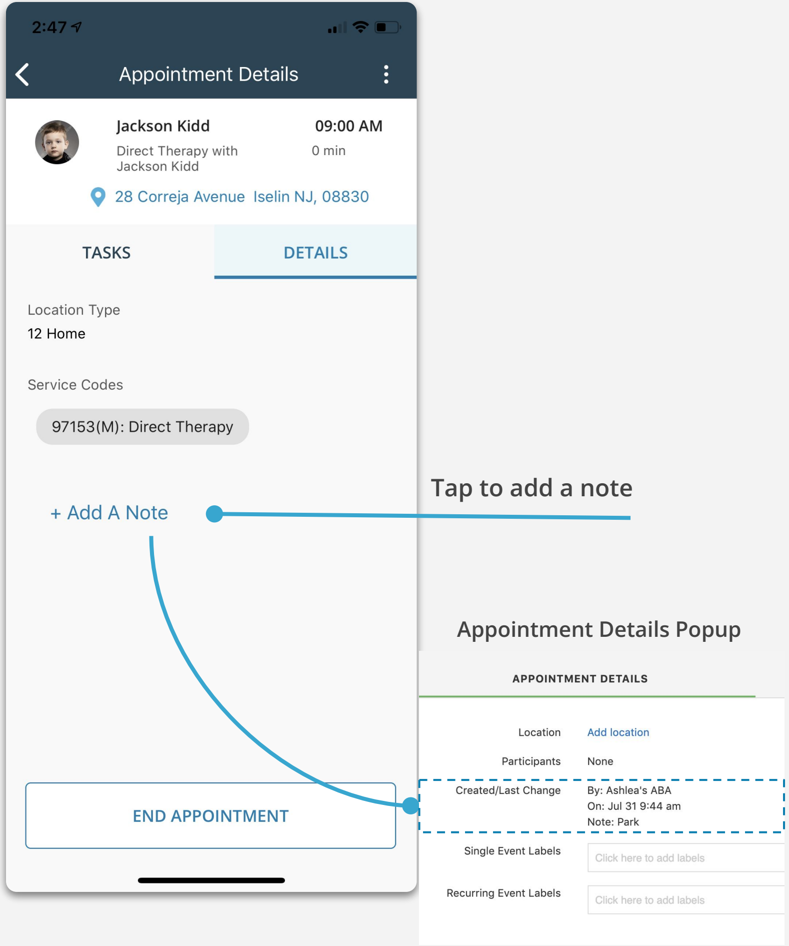


Tap to edit time

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.



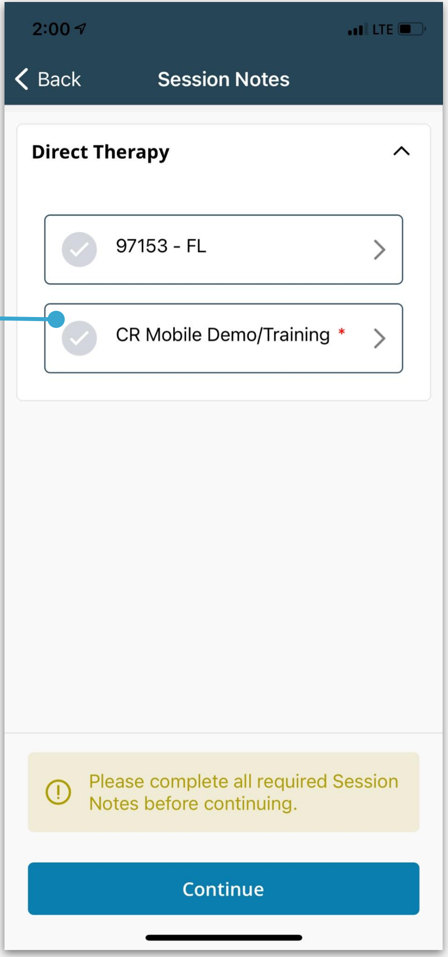
Complete Session Note

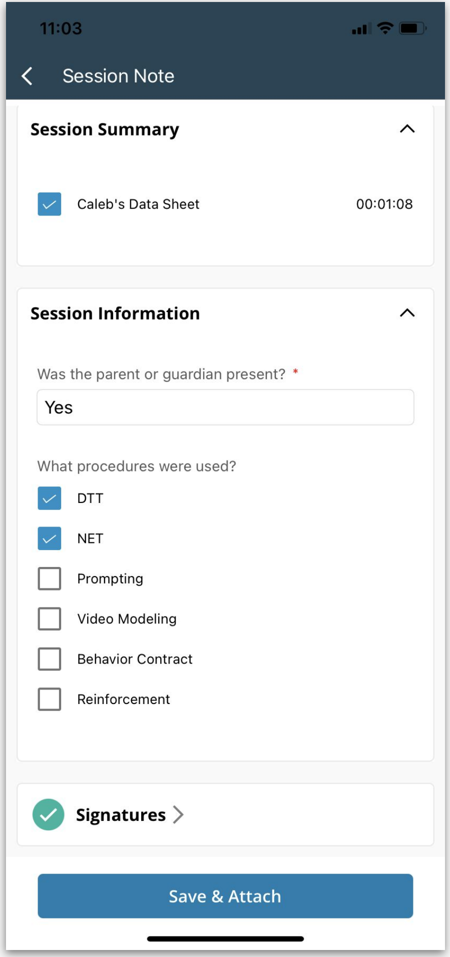
After the appointment is ended, the Session Note(s) will appear. The system will prompt you to complete Session Note(s) before continuing, but you may click 'Continue' and complete notes later in Draft Timesheets.

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.

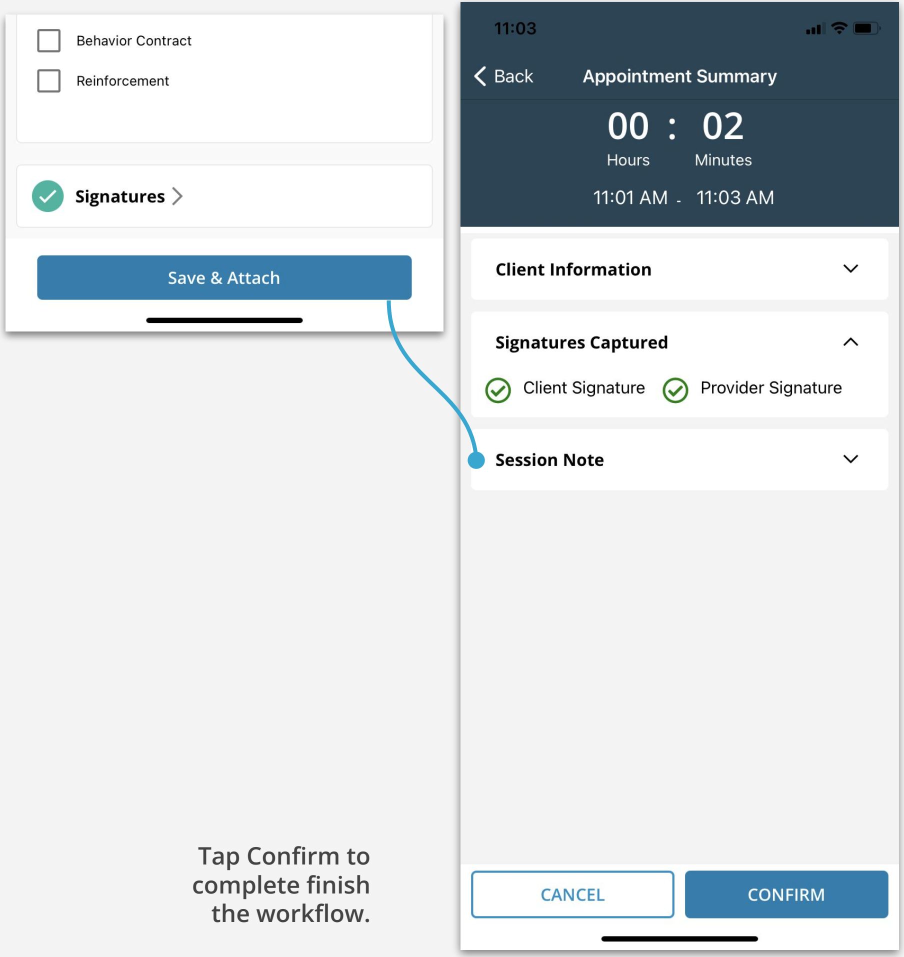




Confirm Appointment

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.



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.

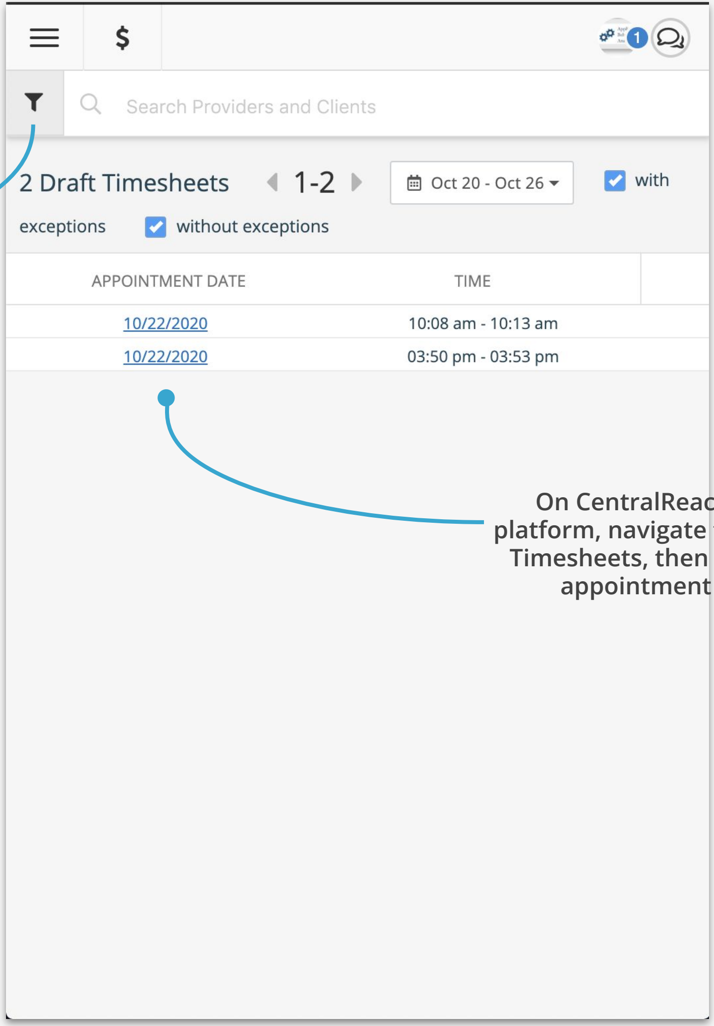
Finishing Your Appointment
Draft Timesheets

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

Filters and search available



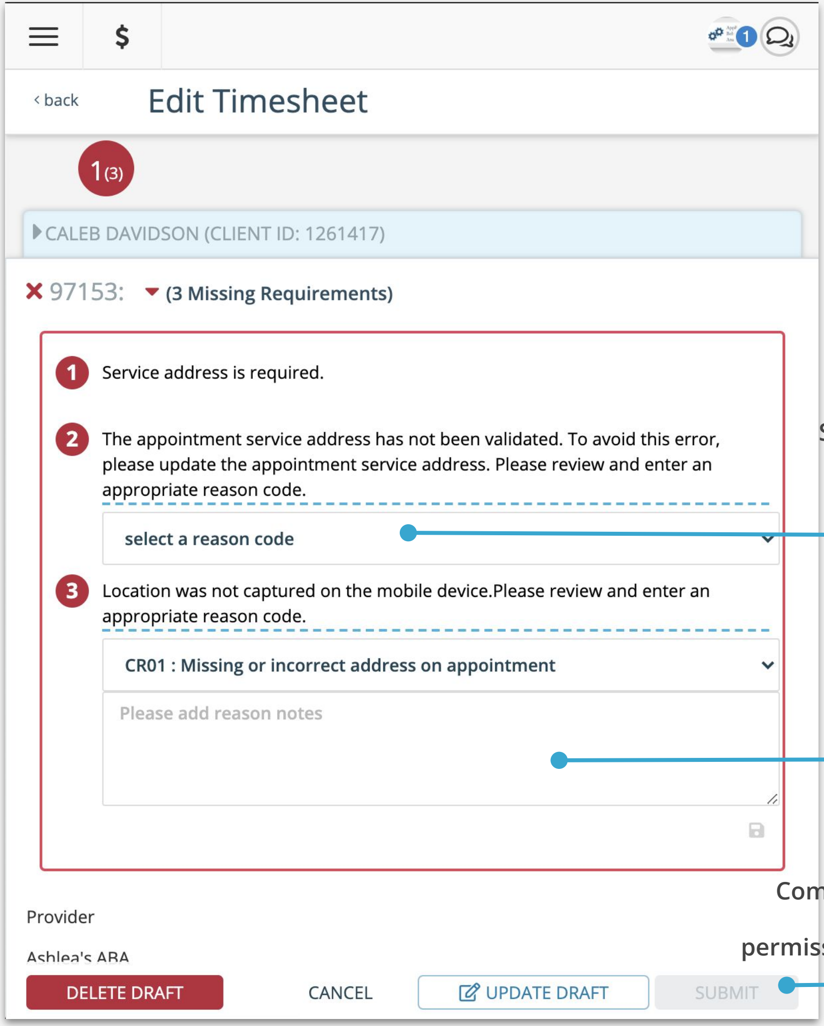
On CentralReach's web platform, navigate to $ > Draft Timesheets, then select the appointment date.

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.



Select a reason code for EVV exceptions

Type details.

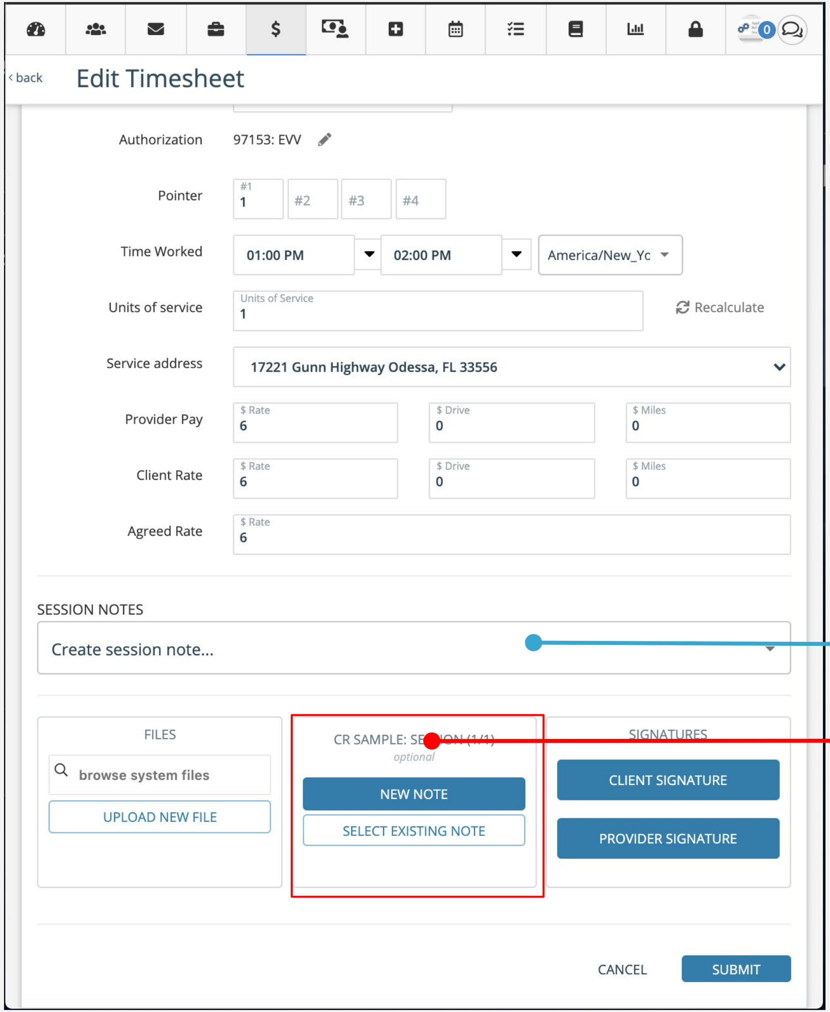
Complete required fields + have permission to submit.

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.



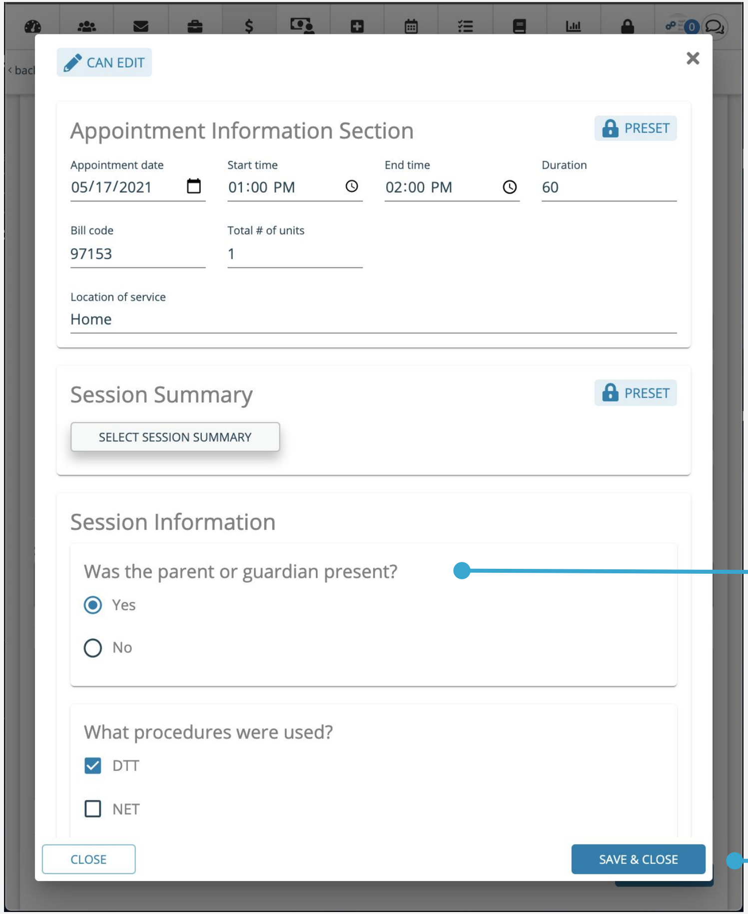
Click the dropdown to select & create a session note.

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.



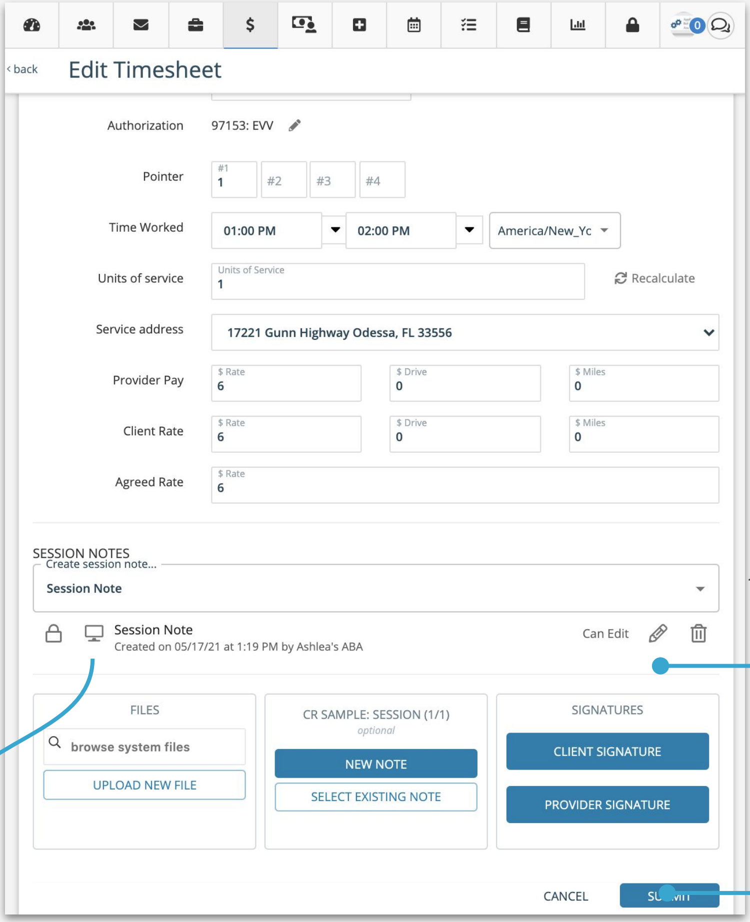
Complete all required areas.

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.



Use the pencil to edit, and the trashcan to delete.

Indicates whether completed by Mobile or web.

Click “submit” when finished.