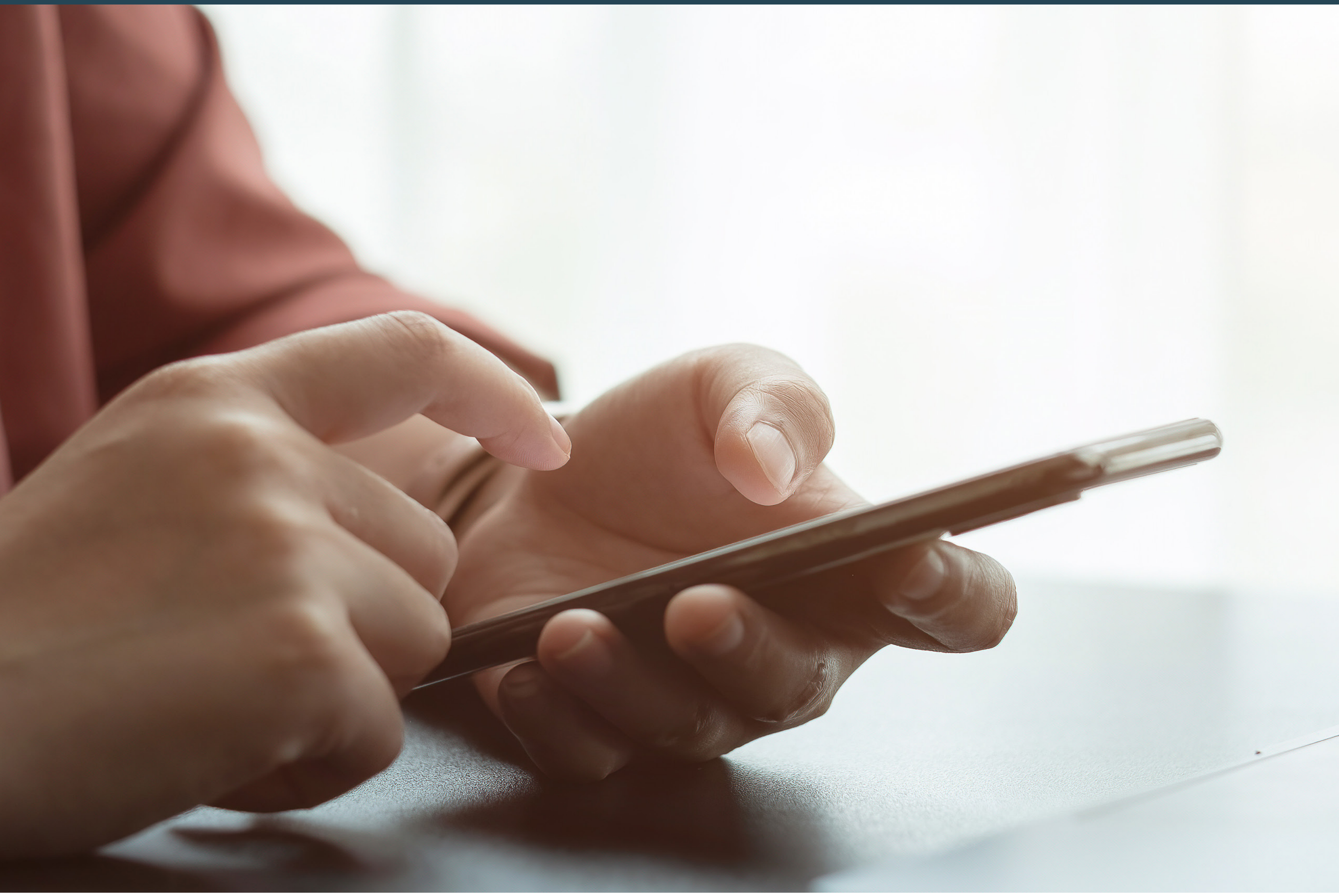

CR Mobile®

CR Mobile Premium Setup in 3 Simple Steps!

Quick, successful setup for the leading CR Mobile application.

Congratulations! You've now subscribed to the leading mobile application for ABA data collection and scheduling, designed to streamline the RBT workflow right in the palm of your hands. So what's next? Here's how to get set up in 3 simple steps.

1. Set up your permission groups.

This may be the most important step -- getting users the access they need for CR Mobile success! Consider these three groups below. Either add the listed permissions to your existing group(s), or make new permission groups and add users to the new groups.

Session Note Template Creators (often admins or managers)	**CR Mobile Users** (usually RBTs)	**Timesheet Approvers** (often admin and billing staff who may change timesheets)
In addition to all permissions these users have today, please add at minimum: 1. Learn > Session Template > Access 2. Learn > Session Template > Add New Templates 3. Learn > Session Template > Delete Templates 4. Billing > Service Code* 5. Billing > Settings > Manage*	Please ensure CR Mobile users have these permissions. 1. CR Mobile > Access 2. CR Mobile > Map > Access 3. Learn > Access 4. Learn > Session Note > Add Note 5. Learn > Session Note Edit Note 6. Learn > Session Note > Delete Note (optional) 7. Scheduling > Access 8. Billing > Access 9. Billing > Draft Timesheets > Access 10. Billing > Timesheets > Access 11. Billing > Timesheets > Allow Conversion Modification (optional) *Plus, choose one or both of the permissions below. Permission 13 is sufficient if you do not use EVV.* 12. Billing > Draft Timesheets > Manage 13. Draft Timesheets > Submit Draft	In addition to all permissions these users have today, please consider the following: 1. Learn > Session Note > Unlock 2. Learn > Session Note > Delete 3. Billing > Service Code* > Associate Template 4. Billing > Settings > Manage* 5. Billing > Access 6. Billing > Draft Timesheets > Access 7. Billing > Timesheets > Access 8. Billing > Manage Timesheets 9. Billing > Timesheets > Allow Conversion Modification (optional) *Plus, choose one or both of the permissions below. Permission 10 is sufficient if you do not use EVV.* 10. Billing > Draft Timesheets > Manage 11. Draft Timesheets > Submit Draft

***These permissions are required to associate a new Session Note Template to a service code (see step 3 below).**

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2. Make a Session Note Template.

While Notes & Forms can be used for many things, Session Note Templates are specific to -- you guessed it -- Session Notes! Users with the right permissions (see above) should navigate to the Learn Module > Clinical Section > Session Note Templates.

Then make a template! Use the **Preset Sections** to automatically pull-in basic information like Provider, Client, Appointment, Session Summary, Signatures, and more. Then, add **Custom** sections if you need technicians to type any other information or type of data to your session note. **Watch the video**

3. Associate your new Session Note Template to a Service Code.

For your Session Note to appear to CR Mobile users, it has to be connected to a service code (which is linked to an appointment). Users with the right permissions (see above) should navigate to the **$ Billing Module > Service Codes** and then click on the appropriate service code.

Then associate templates! Use the **Associate Templates** tab on the far right. A dropdown will enable you to select the new Session Note Template and associate it to the service code. *And clean up as needed! Use the middle Note Templates tab and delete/make optional the old Notes & Forms templates that you don't need anymore.* **Watch the video**

*Don't forget! You'll also see a new section in the $ Billing Module: **Draft Timesheets.** If users do not complete the whole workflow on the CR Mobile app (for instance, if they skip session notes), their timesheet will appear in Draft Timesheets to finish the last steps. ***Never*** *convert a CR Mobile appointment from the calendar. Users should always go to $ > Draft Timesheets to view/complete appointments.*

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Now you're ready to go!

You've completed steps 1-3. You have appointments with service codes (associated to the new Session Note Templates). And your technicians are assigned data sheet Sessions. Now it's time to tell your technicians!

Ask your technicians to download the app from GooglePlay or Apple stores, then login with their CentralReach credentials while connected to the internet. Their appointments and sessions should immediately download. If they need any help knowing what to do, they can watch the 2-minute training **here** or review the detailed **playbook**.