CR Mobile – Clinical and CR Mobile Session Notes (Overview for Admins)

V2.0

Organization

Subscribes to CR Mobile, CR PM Bundle, CR Clinical Bundle

Session Note Template Permissions/Access

1. Set up permissions for creator of session note templates
   - Recommendation is for creators to have access to create and delete session note templates and add the session note template to service codes (Learn -> Session Template-> Access; ; Learn -> Session Template -> Add New Templates; Learn -> Session Template -> Delete Templates)
2. Set up permissions for admin, billing, or quality assurance teams
   - Recommendation is for admins, billers, or QA teams to unlock and delete a session note via timesheets. *Unlocking will remove any signatures from the session note (Learn->Session Notes >Unlock; Learn->Session Note -> Delete Note)
3. Add users to newly created permission groups or add permissions to existing permission groups

Session Note Template Setup

1. Create Session Note Templates
2. Associate with service codes
   - Employee with Billing->Settings-> Manage; AND Billing -> Service Codes -> Associate Templates permissions

(Refer to 'CR Mobile Session Notes for Admins' workflow or video)

CR Mobile and CR Session Note Permissions/Access for Providers

1. Set up permission groups for CR Mobile and CR Session Notes Users (providers/ technicians)
   - Recommendation is for providers to have ability to use CR Mobile and mapping abilities (CR Mobile -> Access; CR Mobile -> Map -> Access)
   - Recommendation is for providers to have ability to fill out/add a note via timesheets and edit their own session notes in the browser (Learn -> Session Note -> Add Note; Learn -> Session Note -> Edit Note)
     (Optional Learn -> Session Note -> delete note)
2. Add providers to permission groups

Download CR Mobile

1. Instruct providers how to download CR Mobile Premium to their devices
2. Org downloads CR Mobile to org devices

Setup Complete

Scheduler

Create Appointments for Provider and Client

Appointments for providers and clients are created in browser

* We recommend geolocating appointment locations, which may require you to create new appointments/series. Geolocation is required for Map View and for EVV, if applicable.

Provider/Tech

CR Mobile is downloaded on device

Complete Appointment on CR Mobile App

Prior to appt., confirm appts and client sessions are visible on the app

1. Login to app using email and/or MFA (pin/biometrics)
2. My Appointments -> Choose today's appt
3. Touch START APPOINTMENT -> Yes
4. Touch Sessions -> Choose client's session
5. Start Session (>) and collect data
6. When data collection is completed, touch GRAPH ALL -> Graph All Targets
7. Touch END SESSION –> Confirm Yes
8. Go back to Appointment Details page (using <)
9. At end of appt., on TASKS tab -> Signatures ->
Collect client and/or provider signatures for timesheet, if required -> Done
10. Touch DETAILS -> Add Notes summary (optional)
11. END APPOINTMENT -> Yes

(Refer to 'CR Mobile Session Notes for Technicians' workflow or video)

Complete Session Note on CR Mobile App

1. After completing appt the Session Notes screen will display
2. Choose Note to complete
3. Complete Note (All required fields * must be completed prior to next step) -> Save & Attach -> Confirm Saving and Attaching this note by 'Save'
4. At Appointment Summary, verify time of appt (displayed on timesheet; edit if necessary based on company policy) -> CONFIRM

*If the technician does not complete the required or optional note in CR Mobile, they will need to log into the browser and fill out the note at $ -> draft timesheet OR $-> timesheet

Appt converted with session note attached

Draft Timesheet Approver

Validation errors?

Yes → Review draft timesheets

Approve Exceptions and Submit Draft Timesheets

1. Login to browser
2. $ -> Draft Timesheets
3. If there are entries, click on date of timesheet
4. Complete draft timesheet
   - Audit/Approve/Complete exceptions
5. 'Submit' timesheet

Draft timesheet is now a timesheet/ billing entry

No → Draft timesheet is now a timesheet/ billing entry