

USING CELLTRAK VISIT MANAGER

Note on Terminology:

People enrolled in a Medicaid program and who receive Consumer Direct payroll services are called a **"Participant."** They may also be called a "Service Recipient" or "Consumer."

A worker who is hired to care for a participant is called a **Direct Service Worker** (DSW).

An **"Activity"** in CellTrak may also be called a "Visit."

Federal law requires states to implement Electronic Visit Verification (EVV). This is a part of the 21st Century Cures Act. CellTrak is an app for smart phones, and tablets with gps, which meets EVV requirements. The app logs the time in, time out, and the place where a Direct Service Worker (DSW) worked in real time.

This guide is about using CellTrak to log and approve time worked on the DSWs smart phone.

Note: DSWs must first register their mobile device with CellTrak. Visit <https://consumerdirectfl.com/forms> to learn more about CellTrak registration.

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Logging a Visit: Overview

Logging a visit with CellTrak is a two-step process.
Everything is done from the DSWs smart phone.

Step One When a shift starts the DSW signs in to the CellTrak app and begins an "Unscheduled Participant Visit." It's called an "Unscheduled Visit" because visits are not put in CellTrak ahead of time.

Step Two At the end of the shift the DSW signs in to CellTrak again. They answers some questions. Then both DSW and Participant/Designated Representative (DR) sign the shift in Celltrak.

A shift completed in CellTrak is sent over the internet to Consumer Direct for processing. Sometimes a DSW may forget to start CellTrak when they start a shift or forget to "clock out." The DSW can change the shift in the web portal and submit to the participant/DR for approval. This happens when the DSW chooses "needs adjustment" in CellTrak

Starting a Shift

Reminder before starting a shift:

- DSWs must download and register with CellTrak.
- Location services must be active on your phone (see FAQs, page 12).

1 Open CellTrak on your mobile device.

2 Log in to CellTrak with your password (Figure 1).

3 Tap **Run Unscheduled Participant Visit** (Figure 2).

Starting a Shift, continued next page

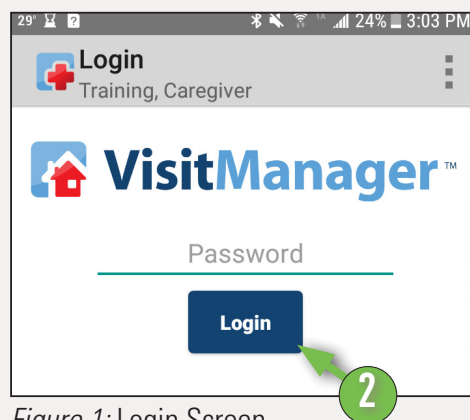


Figure 1: Login Screen

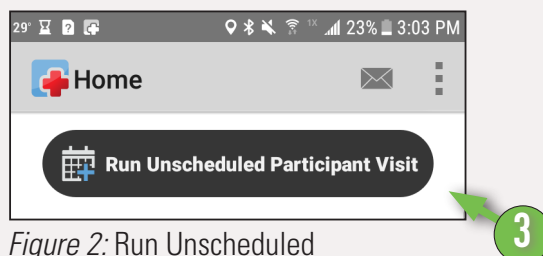


Figure 2: Run Unscheduled Participant Visit Button

Starting a Shift, cont.

4 On the **Participant Lookup Screen** tap the search bar or tap the magnifying glass (Figure 3).

5 You will see a list of participants. **Tap the name of the participant** you are working for (Figure 4).

Note: If you pick the wrong name you can search again. Tap the magnifying glass again (Figure 5, A).

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

7 **Tap Start** (Figure 6).



(you still need to select a service type, see next page)

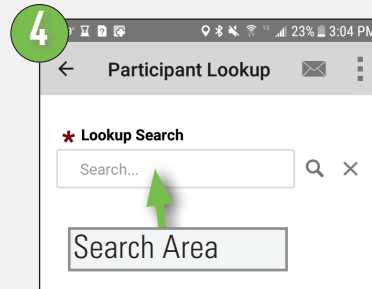


Figure 3: Participant Lookup

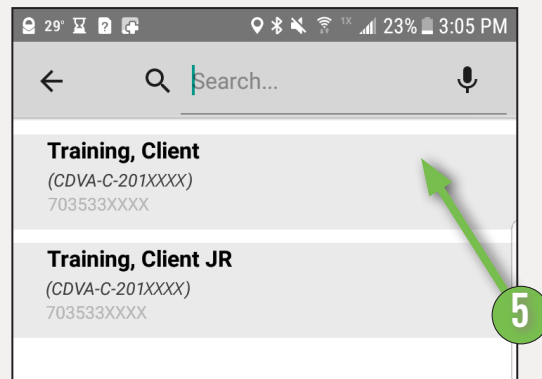


Figure 4: List Of Participants

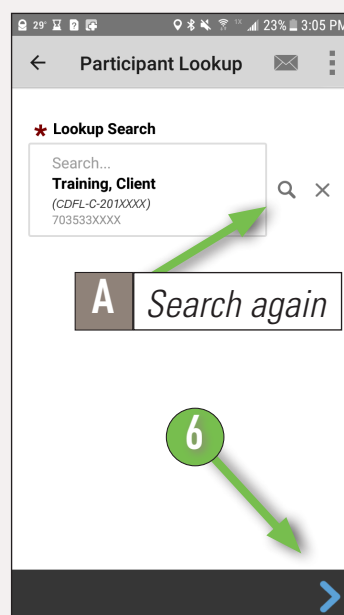


Figure 5: Tap Forward button

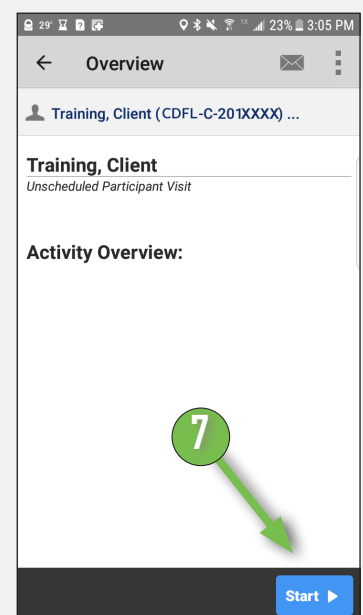


Figure 6: Start Visit Button

Starting a Shift, continued next page

Starting a Shift, cont.

- 8 Next pick the right service type when you see **Choose Workgroup** (Figure 7). Workgroup means Service.
- 9 Tap the **blue arrow** at the bottom of the screen to start your shift.
Do not tap Finish at this time (as seen in Figure 8). You may now put your phone away. Steps for Ending a Shift follow.

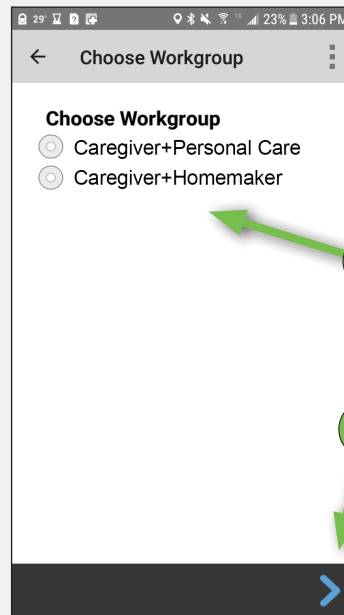


Figure 7: Choose Workgroup

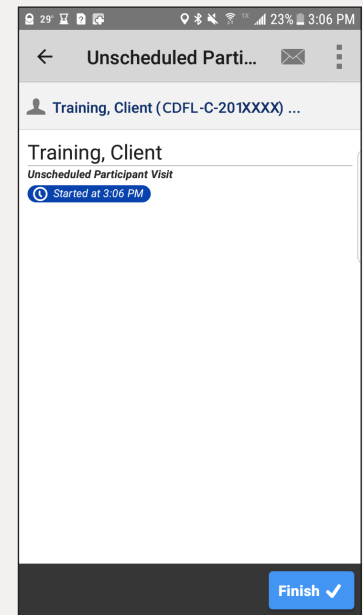


Figure 8: Active Visit Window

Ending a Shift

When the DSW ends their shift they need to **Finish** it in CellTrak.

Finishing a shift in CellTrak has three basic steps: Signing the shift, note if an adjustment is needed, and submit the shift.

- 1 Open **CellTrak** and Login again, if needed.
- 2 Tap the **Finish** button to begin completing the visit (Figure 9).

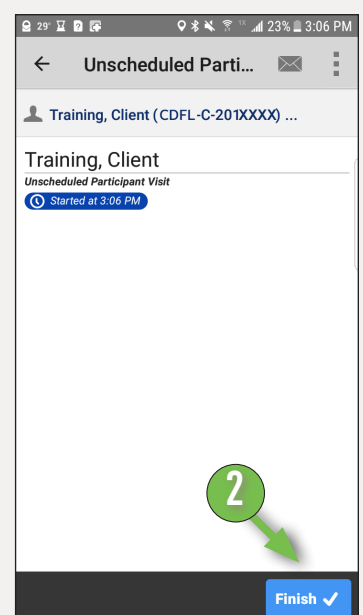


Figure 9: Finish Button

Ending a Shift, continued next page

Ending a Shift: Signing

Two people sign in CellTrak when ending a shift (Figure 10):

- The participant/designated representative (DR) and
- The DSW

Both sign in the same way. We'll go over the signing steps for the participant/DR. Then you'll do the same thing for the DSW.

3 Answer if you are able to obtain the employer's signature (Figure 10).

- If **Yes** (3Y), a signature field appears. Tap it and a signing area pops up. The employer can sign with their fingers or a stylus (Figures 11 & 12).

- If **No** (3N), enter a reason why you were unable to get the signature (Figure 13). Also see the FAQs.

4 If you were able to obtain a signature, select the role of the person who signed (Figures 14 & 15).

continued next page

3 * Are you able to obtain the Service Recipient's/ Designated Rep./ Guardian's Signature?

☒ Please choose

☐ Yes

☐ No

Figure 10: Required Signatures

* Service Recipient / Designated Rep. Signature



Figure 11: Signature Field

Enter a reason why signature was not captured

3N


Figure 13: Reason No Signature

3Y

Signature Capture



Figure 12: Captured Signature

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

* Signed By

Please choose

Figure 14: Signed By

Please choose

Employer of Record

Designated Rep.

4

Figure 15: Signed By Selection

Ending a Shift, Signing, cont

5 The last signing step is to **enter the name of the person signing** (Figure 16).

6 Now go through the signing steps again. This time for the DSW.

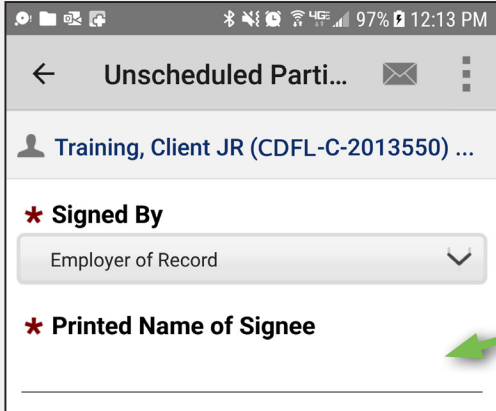


Figure 16: Printed Name of Signee

Ending a Shift: Wrapping Up

7 If you need to make a correction to your shift select Yes. Then **enter the specific adjustment and the reason** (e.g. "change start time to 7:00 am" "logged in late") (Figure 17).

Do this step when you need to change the:

- Service Type
- Start Time
- End Time

8 You do not need to enter any **Visit Summary Notes** (Figure 18).

9 Tap the **Blue Checkmark** to submit your time!

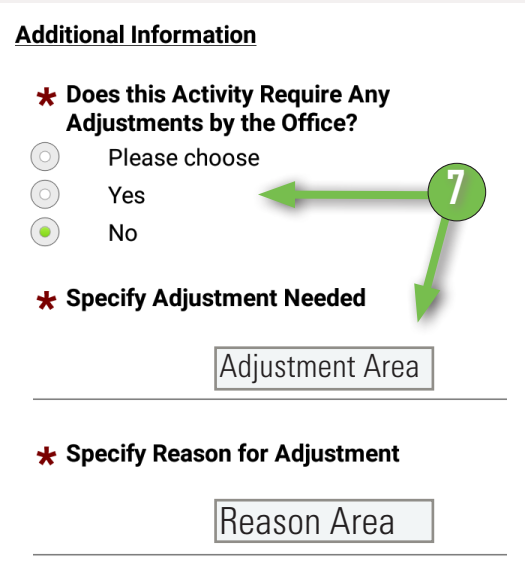


Figure 17: Entering an Adjustment

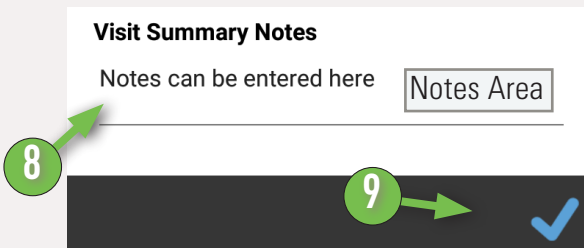


Figure 18: Summary Notes

Reset Your Password

If you forget or want to change your password you can do so in CellTrak. The easiest way is to answer the two Challenge Questions you chose during registration.

- A** Password reset happens when:
- you enter the wrong password three times or
 - you tap "Forgot Password" (Figure 22).

- B** You will need to answer two Challenge Questions. You chose these during registration. You have three tries for each question.

If your answers are right you pick a new password (next page).

- C** Your account locks after three wrong answers to a Challenge Question (Figure 24). You will need an Unlock Code to reset your password. Contact CDCN for the code. Email: infoCDFL@consumerdirectcare.com Phone: 888-444-8182

Enter the unlock code and tap "Unlock Account >" You can then enter a new password (next page).

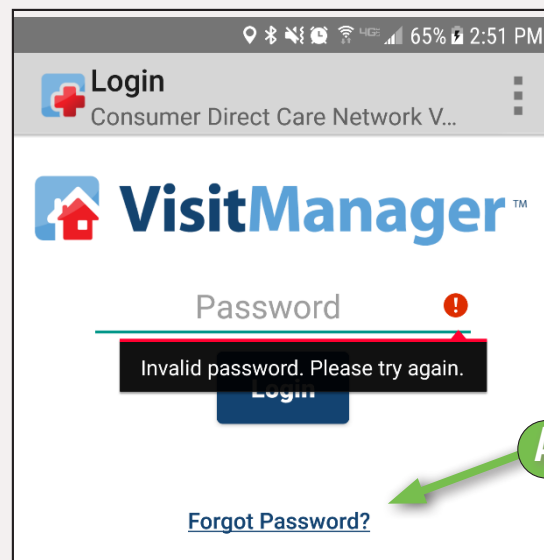


Figure 22: Forgot Password Link

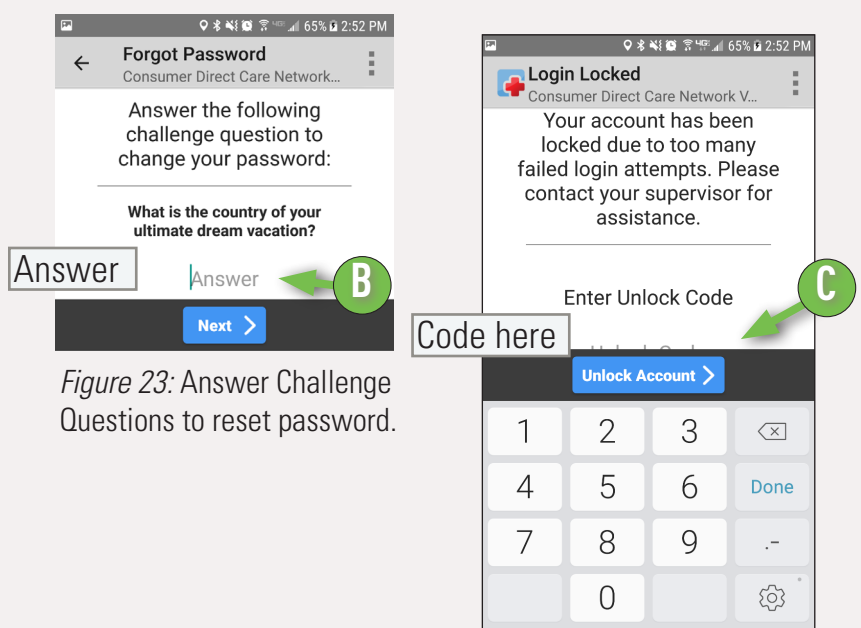


Figure 23: Answer Challenge Questions to reset password.

Figure 24: Account Locked.

Reset Your Password, cont.

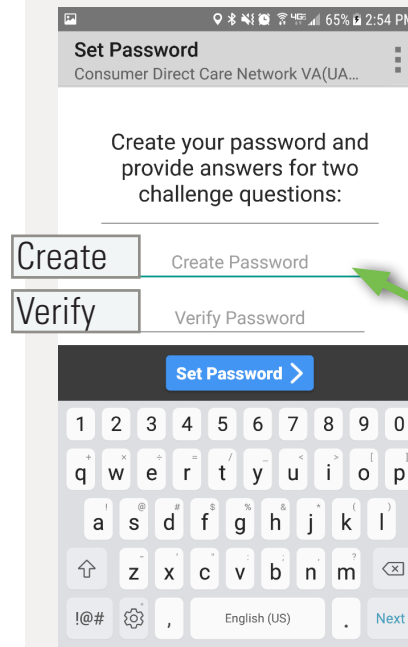
D **Pick a new password.** Enter it twice to make sure it is right. (Figures 25 & 26).

Your password must be six characters long and does not need special symbols.

E You'll then need to choose and answer new Challenge Questions (Figure 26).

F Tap "Set Password" and you'll be able to login to CellTrak with your new password!

Set Password >



Set Password
 Consumer Direct Care Network VA(UA...)

Create your password and provide answers for two challenge questions:

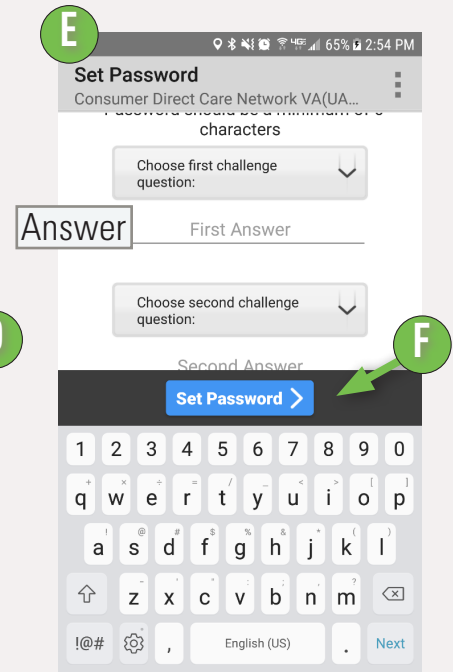
Create Create Password

Verify Verify Password

Set Password >

1 2 3 4 5 6 7 8 9 0
 q w e r t y u i o p
 a s d f g h j k l
 ↑ z x c v b n m <X>
 !@# , English (US) . Next

Figure 25: Enter password twice.



Set Password
 Consumer Direct Care Network VA(UA...)

password should be a minimum of 6 characters

Choose first challenge question:

Answer First Answer

Choose second challenge question:

Second Answer

Set Password >

1 2 3 4 5 6 7 8 9 0
 q w e r t y u i o p
 a s d f g h j k l
 ↑ z x c v b n m <X>
 !@# , English (US) . Next

Figure 26: Choose New Challenge Questions

FAQ

More training materials are online at <https://www.consumerdirectfl.com/forms/>

SHIFT QUESTIONS

I received an error "Invalid User ID or Last Name."

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 participants. You must have at least one active participant to use CellTrak.

How do I make a correction to my shift?

Any updates to your time or missing signatures must be fixed on the CDCN Web Portal. When you select Yes to make an adjustment in CellTrak, (see step 8 on page 6), your shift is sent to the Web Portal. Make your changes on the Web Portal then submit to your participant/DR for approval.

If you miss a shift, enter it on the CDCN Web Portal (see the [Web Portal Guide](#) on how to enter time).

Do participants/DRs have to approve in real time?

Your participant/DR can approve shifts in real time in CellTrak or at a later time on the CDCN Web Portal (see the [Web Portal Guide](#)).

What happens when participant/DR is unable to sign?

If your participant/DR is not present or unable to sign using Celltrak, select No when you are asked for the participant/DRs signature. Enter a reason why they were unable to sign (page 5). The shift will be sent to the CDCN Web Portal for the participant/DR 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 must be logged on its own. For example, let's say you perform Homemaker from 11:00 am to 12:00 pm and then Companion services from 12:00 pm to 3:00 pm. You would need to start Homemaker in CellTrak at 11 and end it at 12, then start a new shift for Companion at 12 and end it at 3.

Do I have to log my shifts in real time?

Time must be logged in real time to comply with the 21st Century CURES Act.

Frequently Asked Questions, cont.

More training materials are online at <https://www.consumerdirectfl.com/forms/>

SHIFT QUESTIONS, CONT

I received an error "Invalid User ID or Last Name." or "No matching participant found" error.

This can also happen when CellTrak does not find an active authorization for any of your participants.

- Open CellTrak
- Complete the shift
- Enter an adjustment.

It will need to be corrected in the CDCN Web Portal (see the [Web Portal Guide](#)).

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

Contact Consumer Direct for help.
email: infoCDVA@consumerdirectcare.com
phone: 888-444-8182

PHONE QUESTIONS

How much data does CellTrak use?

Usually less than 100 Mb a 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.

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

Yes. Download the CellTrak app to your new phone and follow the registration steps again.

My phone died and I don't have a charger. How do I end my shift?

Your shift keeps running in CellTrak even if your phone dies or is turned off. After charging your phone and turning it back on:

I'm locked out of CellTrak after CDCN hours. What do I do?

Interactive Voice Response (IVR) is an option that works with landline phones. If you have not started your shift, use IVR if possible. If IVR is not an option you will need to log it in the CDCN Web Portal.

If you are in the middle of a shift, end it with IVR or with CellTrak once you are able to log in again (following the Reset Password instructions on page 7). A shift ended in CellTrak this way will need to be an adjustment. Then you can change it on the CDCN Web Portal (see the [Web Portal Guide](#)).

Frequently Asked Questions, cont.

More training materials are online at <https://www.consumerdirectfl.com/forms/>

GPS/LOCATION SERVICES

Do I need to turn on location services on my smart phone?

Yes. Effective 10/1/2019 using location services will be required. This is to comply with the 21st century CURES Act.

How do I turn on location services for my phone?

For Android, follow the steps at:

<https://support.google.com/accounts/answer/3467281?hl=en>

For iPhone, follow the steps 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.

REGISTRATION

How do I register?

Registration is in a separate guide. See the [Registration Guide](#) to learn more.

Do participants need to register?

Only DSWs need to register. You pass your phone on to the participant/DR for their signature.

OTHER QUESTIONS

I see a message button. What is that for?

Messaging in CellTrak lets you chat with other DSWs who work with your participants.

Consumer Direct may also send you messages in CellTrak.

Non-Discrimination Disclosure

United Healthcare Community Plan does not treat members differently because of sex, age, race, color, disability or national origin.

If you think you were treated unfairly because of your sex, age, race, color, disability or national origin, you can send a complaint to:

Civil Rights Coordinator United Healthcare Civil Rights Grievance

P.O. Box 30608, Salt Lake City, UT 84130

UHC_Civil_Rights@uhc.com

You must send the complaint within 60 days of when you found out about it. A decision will be sent to you within 30 days. If you disagree with the decision, you have 15 days to ask us to look at it again.

If you need help with your complaint, please call Member Services at **1-888-716-8787**, TTY 711, Monday through Friday, 8:00 a.m. to 8:00 p.m.

You can also file a complaint with the U.S. Dept. of Health and Human Services.

Online: <https://ocrportal.hhs.gov/ocr/portal/lobby.jsf>

Complaint forms are available at <http://www.hhs.gov/ocr/office/file/index.html>

Phone: Toll-free **1-800-368-1019, 1-800-537-7697 (TDD)**

Mail: U.S. Dept. of Health and Human Services,

200 Independence Avenue SW Room 509F, HHH Building Washington, DC 20201

If you need help with your complaint, please call the toll-free member phone number listed on your member ID card.

We provide free services to help you communicate with us. Such as, letters in other languages or large print. Or, you can ask for an interpreter. To ask for help, please call Member Services at **1-888-716-8787**, TTY 711, Monday through Friday, 8:00 a.m. to 8:00 p.m.

Non-Discrimination Policy, cont.

ATTENTION: If you do not speak English, language assistance services, at no cost to you, are available. Call **1-888-716-8787, TTY 711.**

ATENCIÓN: Si no habla inglés, los servicios de asistencia de idiomas están disponibles sin costo para usted. Llame al **1-888-716-8787, TTY 711.**

ATANSYON: Si w pa pale Anglè, gen sèvis èd pou lang ki disponib san w pa peye anyen. Rele **1-888-716-8787, TTY 711.**

ВНИМАНИЕ: Если Вы не говорите по-русски, Вы можете воспользоваться бесплатной языковой помощью. Позвоните по телефону **1-888-716-8787, телетайп 711.**

ATENÇÃO: Se não fala inglês, estão disponíveis serviços de assistência linguística sem nenhum custo para si. Ligue para o **1-888-716-8787, TTY 711.**

注意：如果您不會說英文，您可獲得免費語言協助服務。請致電 **1-888-716-8787，聽障專線 (TTY) 711。**