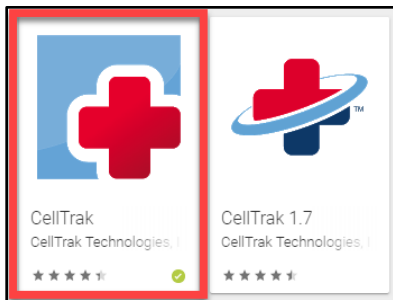# Imagine CellTrak App Manual
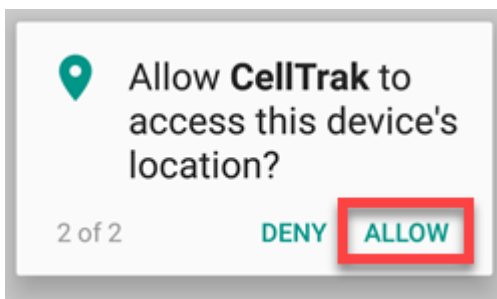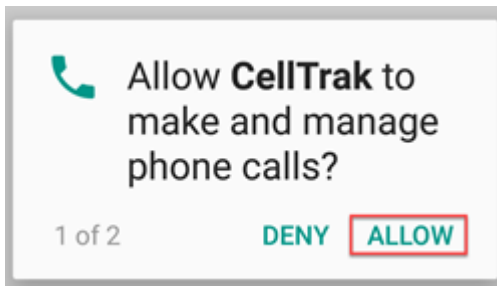
(For Production Environment)
12-10-2020

How to Register the CellTrak App

1. Go to the App Store (iPhone) or Play Store (Android) to download the CellTrak App. Please note that you'll see two options. Select the CellTrak app, **not** CellTrak 1.7.

CellTrak
CellTrak Technologies,

CellTrak 1.7
CellTrak Technologies,

2. Open the app. You will receive a couple of prompts. Please allow both.

Allow **CellTrak** to make and manage phone calls?

1 of 2   DENY   ALLOW

Allow **CellTrak** to access this device's location?

2 of 2   DENY   ALLOW

3. Open the app and enter the License ID and Authentication Code.

   License ID = 200676
   Authentication Code = 311584

4. Enter your phone number on the 3rd line if applicable. *Android will put the phone number in for you. An iPhone user has to type it themselves.*
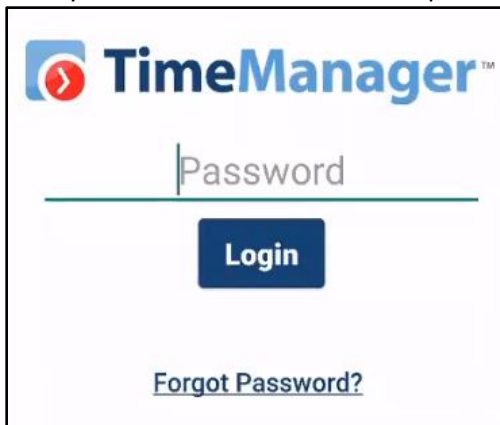
5. Hit **Acquire License**.

6. On the next screen, enter your User ID and Last Name.

   User ID = Your Employee Clock Number

   Last Name must match Evolv exactly. Keep that in mind if there are hyphens or spaces in your last name. It will be entered in lower case, which is fine.

7. Create a Password. Although a minimum of six characters are required, this can be simple. Because you will be going in and out of the app often, a birthday or anniversary is suggested.

8. Finally, answer the two challenge questions. No need to overthink this. Be aware there is a timeout. You have 120 seconds to complete this process.

9. Hit Register User.

10. Next you will be asked to enter the password you created in step 6.

If you are ready to run an activity, enter your password and follow the directions in the next section titled *How to Run an Unscheduled Activity in the CellTrak App*.
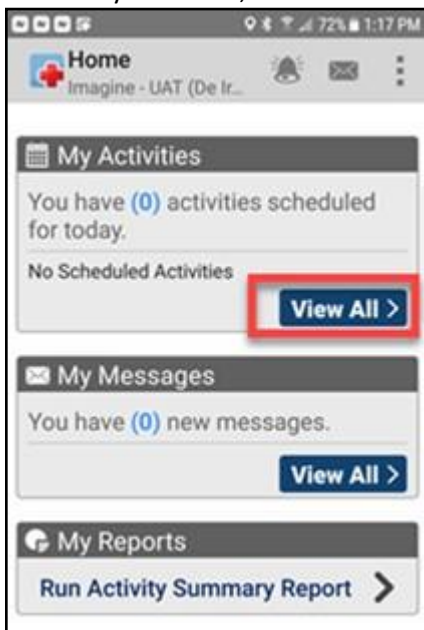
NOTE ABOUT DATA USAGE: Data usage varies, but if a user sees 5 clients a day, 5 days a week, they would use 2MB of data a month.

How to Run an Unscheduled Activity in the CellTrak App

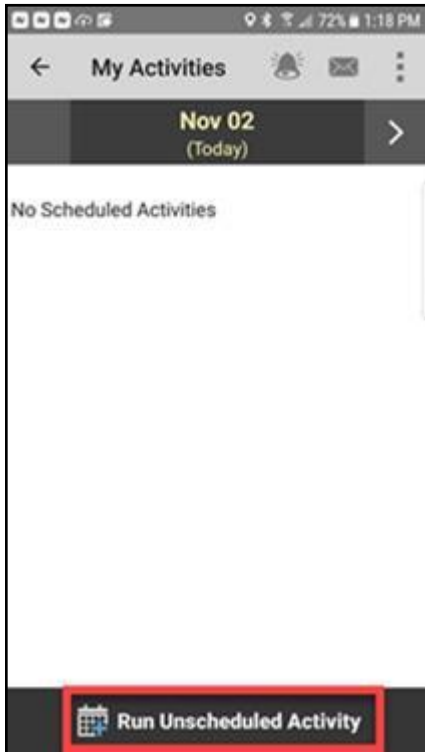1. Log in to the CellTrak app on your device.

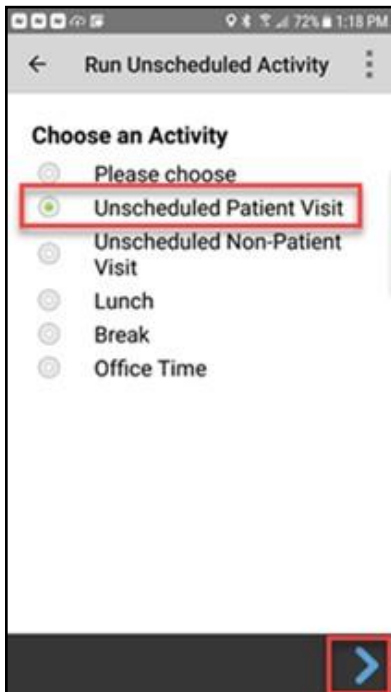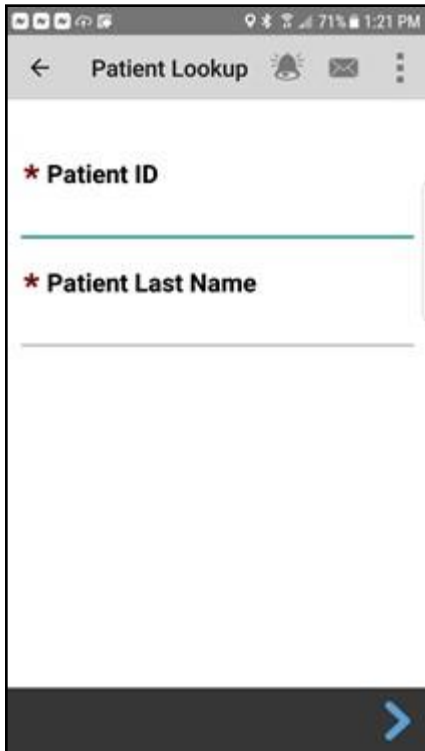2. Under My Activities, select **View All**.

3. Because Imagine! doesn't currently schedule activities ahead of time, you will **not** see any scheduled activities and will select Run Unscheduled Activity at the bottom of the screen.

4. Select **Unscheduled Patient Visit** and tap the blue arrow.

5. Log in with the Patient ID provided to you and the Patient Last Name.

6. Verify that the patient name is correct (hidden in screenshot) and tap **Start**.

7. You will not ordinarily receive a Geo Fence Warning if you are at or near the client's house. If you do receive this warning, hit continue but notify your supervisor right away. The client's address probably needs to be updated.


8. CellTrak recognizes Workgroups by a staff person's credentials. If you have more than one credential, you may need to select the credential that applies to this visit. If you only have one credential documented on your staff record, you will **not** see this screen.
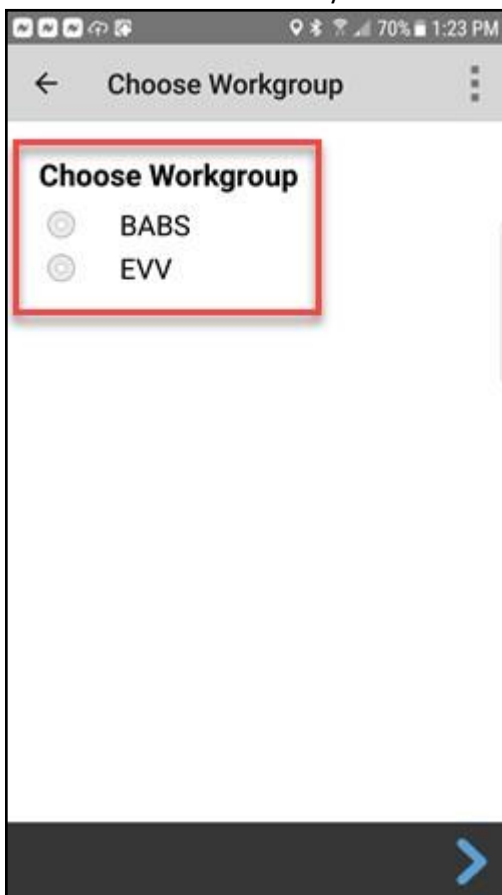
9. Now the visit has started. You'll know it's working because the app tracks the duration. Once you're done providing a service, click **Finish**.
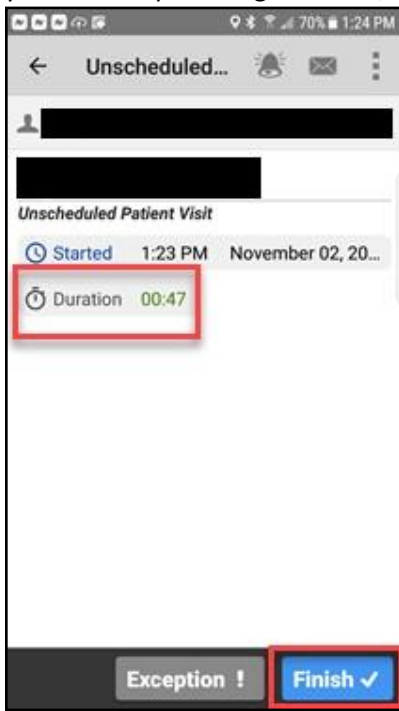
10. On the closing page of the app, you'll be asked if your visit was in person or via telehealth. Use the following menu to indicate which selection applies to this visit.
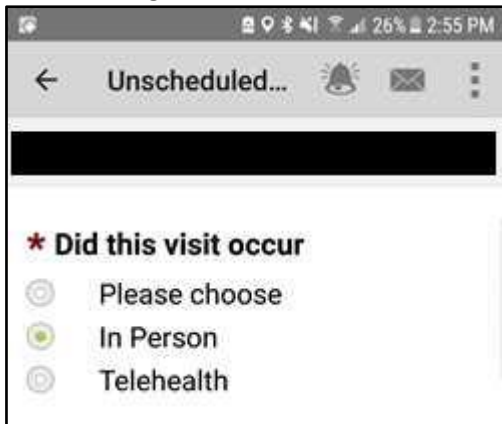
11. Next, indicate whether or not the client or guardian is able to provide a signature and allow them to sign if so. Then you will sign. Notice that you have to tap the pencil icon to do this.

The signature screen looks like this:
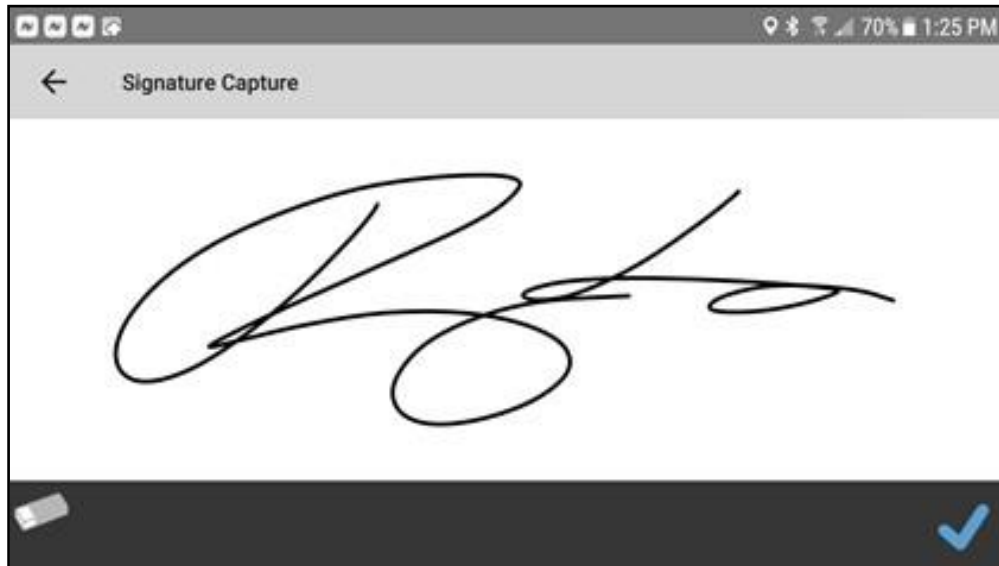
12. Unless otherwise instructed, just keep the default answer of **No** on the question about adjustments.

13. Pay close attention to your choices in the two picklists. First you will enter the service provided by **Funding Source**. Then you will <u>enter the same service again</u> by **Program**. In this example, a client who has SLS as their funding source and is enrolled in the FRE program received the service type *Homemaker-Enhanced*.

Ignore the Visit Summary Notes. They are *not* Progress Notes and do not export to Evolv. Chances are that nobody will ever read them.

Once you've completed the service picklists, tap the blue checkmark.
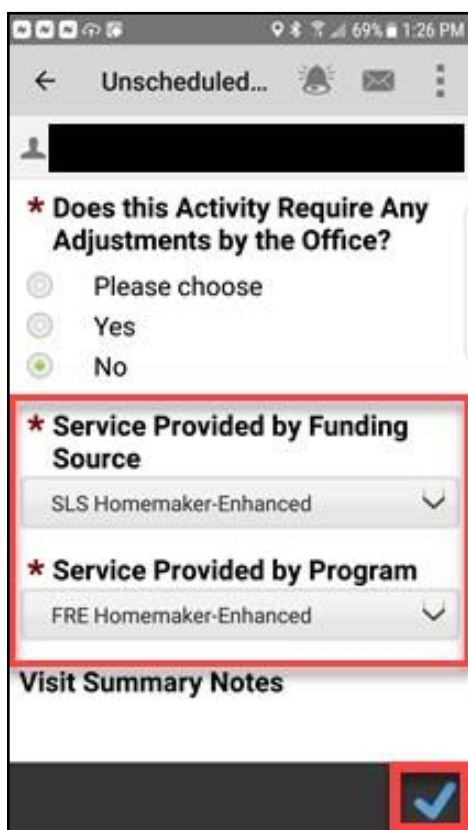
14. You will be asked to Confirm that you want to finish this activity/service. Tap **OK**.
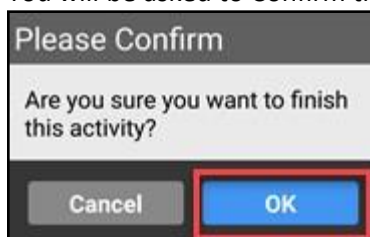
This will take you back to the screen where you can run another unscheduled activity if you're providing more than one service during this visit. Otherwise, close the app. After a few minutes, the visit will export to Evolv.