



Electronic Visit Verification (EVV)

AWARDS Instruction Sheet

Overview

The 21st Century CURES Act requires **Electronic Visit Verification (EVV)** for Medicaid personal care services (PCS) and home health services (HHCS) that require an in-home visit by a provider. EVV involves using an application on a mobile device that allows a provider to demonstrate that they're physically present when providing a service.

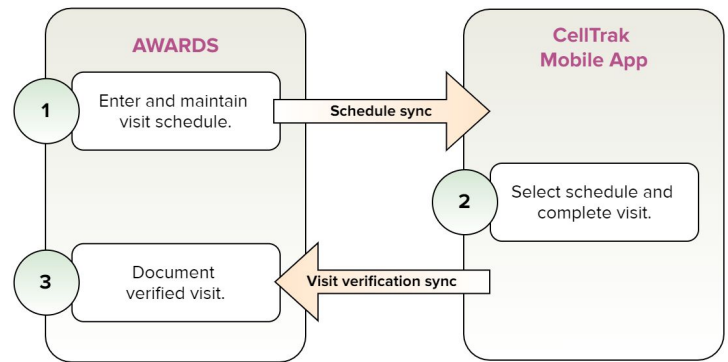
The AWARDS EVV functionality - which is fully compliant with states that allow alternate EVV systems - has an integrated workflow that reduces the need for double data entry, integrates with service documentation, and makes sure that billing works seamlessly with state exchanges and managed care organizations (MCOs).

★ **Important!** AWARDS EVV is an optional add-on service available for subscription as part of AWARDS. If EVV has not yet been turned on in your AWARDS database and you would like to learn more, please review the [Electronic Visit Verification \(EVV\) - Information Sheet & Service Agreement](#).

EVV Workflow

AWARDS EVV works in conjunction with a mobile app provided by our partner, CellTrak, which is installed on the agency providers' mobile devices.

Once an agency configures AWARDS EVV for use in the appropriate programs, the following diagram represents the workflow between AWARDS and the CellTrak app.



⚡ **Tip:** *Unscheduled visits can also be documented using the CellTrak app in the event of unexpected circumstances. In those instances details of the procedure are recorded in the mobile app and require additional information to be added by the CellTrak administrator in order for it to clear and be available for documentation in AWARDS.*

Required Permissions

As noted above, AWARDS EVV is an optional add-on service. In AWARDS databases subscribing to this functionality, its configuration and/or use require the following permissions:

For Administrators / EVV Configuration	For Users / EVV Data Entry
Agency Program Information Display Executive Administration Buttons* Permissions Data Entry* Permissions Data Entry for All Staff and Layers*	Program Chart Access Display Any Chart Records Buttons Display Chart Records Services - Individual Button Visit Schedule (EVV) Data Entry

* You must only have ONE of the permissions noted with an asterisk. Members of the “Executive Officer” and “System Administrator” user groups are exempt from that requirement entirely.

* **Tip:** Additional administrator-specific permissions are required if your AWARDS database is configured to use the BillingBuilder feature and EVV-related procedures must be set up.

About This Document

This document is intended for use by both AWARDS administrators and users, and details the following processes:

[Getting Set Up with EVV](#) - Learn how to get ready for EVV, whether you are an AWARDS administrator or a user.

[Working with Visit Schedules](#) - Learn how to enter and maintain visit schedules in AWARDS for use with EVV.

[Completing a Visit](#) - Learn how to complete a scheduled visit within the CellTrak app on your mobile device.

[Documenting Verified Visits](#) - Learn how to write progress notes for EVV-linked visits.

[Using the Visit Schedule \(EVV\) ReportBuilder](#) - Learn to generate reports of scheduled and/or completed visit data.

[Frequently Asked Questions](#) - Learn the answers to common EVV questions.

[Additional Resources](#) - Access other useful documents and videos, provided by CellTrak.

Getting Set Up with EVV

Prior to using EVV with AWARDS, AWARDS administrators and users need to complete the following basic set up tasks.

- For Administrators** - Learn to set up a program in AWARDS to use EVV, and to grant access to individual users.
 - [Turning on EVV for a Program](#)
 - [Configuring Billing Procedures for EVV](#) (only required when using the AWARDS BillingBuilder)
 - [Working with the CellTrak Administrative Portal](#) (also used for as needed maintenance/administration)
 - [Granting User Access to EVV Visit Schedules](#)
- For Users** - Learn what service providers need to do to get ready for using EVV with AWARDS.
 - [Completing Individual Setup](#)

Turning on EVV for a Program (Administrators)

Each program that is to use the EVV functionality must be configured in AWARDS to reflect that. To do so, complete the following one-time setup for each of those programs:

- Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.
- Click **Agency Program Information**, and then **Add/Edit Entire Program**. The *Add/Edit Programs* page is displayed.
- Click the **Program** drop-down arrow and select the program for which EVV is to be turned on.
- Confirm that the **Database** option is set to its default value - "Data Entry."
- Click **CONTINUE**. The *Agency Program Information* page is displayed.
- Click the **Address/Contact Information** tab.
- Confirm that a full address has been entered for this program and, if not, do so now.

The screenshot shows the 'Agency Program Information' page for a 'Sample Program'. It features several tabs: General Settings, HMIS Settings, HMIS Site Information, Optional Settings, OMH Settings, Address/Contact Information, and Billing Info. The 'Optional Settings' tab is active. The settings include:

- Allowed CSV Import Types: [Dropdown]
- Program Level of Care: [Dropdown]
- Households Share One Common Sleeping Area:
- PRU Number: [Text Input]
- Client Search Record Sharing: No Sharing - Nothing At All Shows
- NYS Developmental Disabilities (DD) Program:
- Central Intake Program: [Dropdown]
- EVV Program:

 At the bottom, there is a 'CONTINUE' button and an 'Add/Edit Menu' link.

8. Click the **Optional Settings** tab.
9. Check off the **EVV Program** checkbox.
10. Click **CONTINUE** to save.
11. Click **CONTINUE** to confirm your changes.

The process of turning on EVV for a program is now complete. Repeat these steps for each program using EVV functionality in AWARDS.

Configuring Billing Procedures for EVV (Administrators)

If your AWARDS database uses BillingBuilder functionality, several additional one-time steps are required to configure billing procedures for EVV. These steps must be completed for each BillingBuilder payer, billing type, and procedure combination where EVV is applicable; they are NOT required when BillingBuilder is not in use.

✳ **Tip:** The following instructions assume modification of existing billing procedures to reflect the EVV component. For detailed instructions on setting up new billing procedures, please see [Billing Setup](#) in AWARDS Online Help.

1. Click **Administration** from the left-hand menu, and then click **Fiscal**. A fly-out menu is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Configure Billing Types**. The *Configure New Billing Types and Procedures* page is displayed.
4. Click the **Payer** drop-down arrow and select the payer for which EVV procedures are applicable.
5. Click **VIEW BILLING TYPES**. The *View Billing Types* page is displayed.
6. Click the **Billing Type** drop-down arrow and select the type for which EVV procedures are applicable.
7. Click **EDIT PROCEDURES**. The *View Procedures of Billing Type* page is displayed.
8. Click the **Billing Procedure** drop-down arrow and select the procedure to be configured for EVV.
9. Click **UPDATE**. The *Billing Procedures Setup* page is displayed.
10. Click **UPDATE & IDENTIFY UNITS OF SERVICE**.
11. At the bottom of the page, click the **EVV Procedure?** checkbox.
12. Click **UPDATE & CONFIRM PROCEDURE SETUP**, and then click **FINISH** to complete the change.

The screenshot shows a web form titled "Billing Procedures Setup". At the top, there are input fields for "Maximum Number Per Week", "Invoices", and "Units (Week begins Sunday)". Below these is a section titled "Program Division Enrollment is Required" with a sub-section "EVV Procedure?" where a checkbox is checked. A yellow button labeled "UPDATE & CONFIRM PROCEDURE SETUP" is highlighted. At the bottom, there are two buttons: "BillingBuilder" and "Billing Procedures ReportBuilder".

The process of configuring a billing procedure for EVV is now complete. Repeat these steps for each BillingBuilder payer, billing type, and procedure combination where EVV is applicable.

★ **Important!** Additional configuration may be required based on your state aggregator requirements. See the optional instructions that follow for details.

OPTIONAL: Updating Payer ID for State Aggregator Requirements

To update the **Payer ID** of a payer for which EVV procedures are applicable, complete the following steps:

1. Click **Administration** from the left-hand menu, and then click **Fiscal**. A fly-out menu is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Payers**. The *Payers* page is displayed.
4. Click the **Payer** drop-down arrow and select the payer for which EVV procedures are applicable.
5. Click **UPDATE**.
6. Enter a value in the **Payer ID** field.
7. Click **Save** to apply your change.

The process of updating the Payer ID is now complete. Repeat as necessary for all applicable payers.

OPTIONAL: Updating Medicaid Provider ID for State Aggregator Requirements

To update the **Medicaid Provider ID** of a payer for which EVV procedures are applicable, complete the following steps:

1. Click **Administration** from the left-hand menu, and then click **Fiscal**. A fly-out menu is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Program Billing Info**. The *Program Billing Info* page is displayed.
4. Select the appropriate **Program** and **Payer**, and then click **CONTINUE**.
5. In the “Atypical Billing Options” portion of the page, enter a value in the **Medicaid Provider ID** field.
6. Click **CONTINUE** to save your change.

The process of updating the payer’s Medicaid ID is now complete. Repeat as necessary for all applicable program/payer combinations.

Granting User Access to EVV Visit Schedules (Administrators)

As noted in the [workflow diagram](#) on the first page of this document, the AWARDS component of EVV functionality consists of visit schedules entry and maintenance, and then the documentation of visits once those visits have been completed using the CellTrak application. While the documentation component of this workflow does NOT require any EVV-specific permissions, the visit schedules component DOES. As a result, whoever of your staff will be maintaining visit schedule records must be granted access. To do so, complete the following steps:

✦ **Tip:** The **Visit Schedule (EVV) Data Entry** permission is not available for assignment until at least one program has been configured to use EVV, as detailed under [Turning on EVV for a Program](#).

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.
2. Click **Permissions Maintenance**. The *Permissions Selection* page is displayed.

3. Click the **Permission Type** drop-down arrow and select “Data Entry/Access.” Adjust other settings as needed.
4. Click **CONTINUE**. The *Worker Selection for Permissions* page is displayed.
5. To assign EVV access to a single user, click the **Worker** drop-down arrow and select that individual; otherwise, leave this selection at its default value - “All Workers.”
6. Click the **All Data Entry/Access** drop-down arrow and select “Visit Schedule (EVV) Data Entry.”
7. Click **CONTINUE**.
8. Click the **Visit Schedule (EVV) Data Entry** permission next to the worker(s) to whom access is being granted.
9. Click **UPDATE PERMISSIONS** to save your change(s).

The process of assigning EVV access permission is now complete.

☀ **Tip:** Remember to also add this permission to relevant permission layers such as User Group, Work Role, and Job Title so that as new staff are brought on board in the future they automatically receive the EVV permission is appropriate.

☀ **Tip:** For more detailed information on permissions in AWARDS, please see [Permissions Maintenance](#) in AWARDS Online Help.

Working Within the CellTrak Administrative Portal (Administrators)

CellTrak provides administrators with a portal through which basic setup and ongoing maintenance can be completed. Documentation on the portal is provided by CellTrak:

- [CellTrak Administrative Setup Training](#)

Completing Individual Setup (Users)

☀ **Tip:** The individual setup detailed in this section must only be completed by the direct service providers who will be completing scheduled visits with clients. If separate staff are responsible for scheduling visits versus carrying them out, the following is NOT relevant for those who will only be doing the scheduling.

As reflected in the second step of the EVV [workflow diagram](#) provided on the first page of this document, electronic visit verification happens within the CellTrak application on the phones or other mobile devices of the staff members completing those visits. Documentation on the setup process is provided by CellTrak:

- [CellTrak Administrative Setup Training](#) - See pages **8** and **9**

Working with Visit Schedules

The **Visit Schedules** feature, located within the AWARDS Services - Individual module, is used to enter and maintain the schedules for those visits which need to be electronically verified. Once visits are scheduled in AWARDS using this feature they are synced into the CellTrak mobile app, from where they can be selected and completed/verified.

✦ **Tip:** Depending on your agency's chosen workflow, visit schedule entry and maintenance may or may not be the responsibility of the service providers who are completing the client visits. Any staff who will be maintaining visit schedule records must have the **Visit Schedule (EVV) Data Entry** permission assigned to them in AWARDS.

To enter, update, or delete a visit schedule record, complete the following steps from the AWARDS Home screen:

1. Click **Charts** from the left-hand menu, and then click **Services - Individual**. A fly-out menu is displayed.
2. Click **Visit Schedule (EVV)**. The *Visit Schedule (EVV)* index page is displayed.

3. Click the **Program** drop-down arrow and select the program associated with the client for whom a visit schedule record is to be worked with.

📌 **Note:** For clients admitted to multiple programs, visit schedules are **NOT** shared across programs.

4. Click the **Client** drop-down arrow and select the client for whom a visit schedule record is to be worked with.

✦ **Tip:** If the visit schedules to be worked with are for a former (discharged) client, first click the **Archives** toggle to the right of the client selection option.

The index is automatically refreshed to display any existing visit schedule records for the selected client.

✦ **Tip:** When working on the index, records are easily accessible using the following tools and navigation features:

- **“Show Records” display options** - By default the index displays all visit schedule records. To limit the display to only those schedules that can be deleted, change the selection to “Available for Deletion.”

- **Sorting options** - By default, records are sorted chronologically based on start date and time, with the most recent schedules listed first. Click a column header in the data table to sort the index by a different type of data. Click the heading again to reverse the sort order.

- **Navigation options** - 10 records are displayed on the page by default. To access records on subsequent pages of the index (when applicable), click the **arrows** in the bottom-right corner of the table. To display 25 or 50 records at a time, click the **Show** drop-down to the left of the record count - also in the bottom-right corner - and make a selection.



Once you select records on the index, a count of how many total records are selected is displayed in the action bar. Selections are maintained while moving from one page of the index to the next; meaning, you can select records on the first page (showing records 1-10 by default) and move to the next page (displaying records 11-20) without losing the selections made on the first page. Links for **Show all selected records** and **Uncheck All** are available beneath the index table for easy navigation.

- **Search and filtering options** - A **Search** field is available on the action bar along with a corresponding **Filter by**

drop-down list. To search the contents of the index (including those records not currently displayed on the page), enter a value in the **Search** field. The index is automatically updated as you type. To further narrow your search, use the **Filter by** selection to indicate whether the search should look at data in “All Columns” (the default) or a specific column.



• **ReportBuilder access** - The **Visit Schedule (EVV) ReportBuilder** link on the left-hand menu bar provides a shortcut to access the ReportBuilder for this feature. For instructions on using that ReportBuilder, click [here](#).

5. At this time, complete one or more of the following tasks as needed:

-  **Add a new visit schedule** - To do so, click the **add new** icon from the action bar above the records table. The data entry page is displayed. Continue with step 6.
-  **Make changes to an existing visit schedule** - To do so, click the record to be updated, or click the checkbox to the left of that record and then click the **edit** icon from the action bar above the records table. The data entry page is displayed. Make changes to the information on this page as needed, and then click **Save**. The visit schedule record is saved, and a confirmation page is displayed.


★ **Important!** Visit schedules are locked from editing when either of the following is true:

- The corresponding visit has been completed using the CellTrak mobile app.
- A progress note has been written and linked to the visit within AWARDS.

-  **View or print an existing visit schedule** - To do so, click the checkbox to the left of the record to be viewed/printed, and then click the **view** icon from the action bar above the records table. A read-only version of the schedule is displayed and can be printed as needed using your browser’s **Print** option.
-  **Delete a visit schedule** - To do so, click the checkbox(es) to the left of the record(s) to be deleted, and then click the **delete** icon from the action bar above the records table. A confirmation message is displayed. Click **OK** to proceed with the deletion. The selected record(s) are deleted and the updated index is displayed.

✳ **Tip:** Only unlocked schedule records can be deleted. Prior to making a selection, click **Available for Deletion** from the left-hand menu to narrow the records display accordingly. The index is automatically refreshed. Unlocked - available for deletion - records are those where

- The corresponding visit has NOT been completed using the CellTrak mobile app.
- A progress note has NOT been written and linked to the visit within AWARDS.

-  **Return to the visit schedules index** - To do so, click the **To Index** icon from the action bar while working in a schedule record to return to the index page. You can also return to the index at any time by clicking **Visit Schedule (EVV)** from the breadcrumbs trail below the AWARDS navigation bar.

✳ **Tip:** The remaining steps only apply when a new visit schedule is being added; however, they provide detailed information on each field/option available on the data entry page and so may be a useful reference during the schedule editing process as well.

6. In the “Visit Information” portion of the page, configure the available fields and options as follows:

- **Service Date** - In this field, type the date on which the visit is scheduled to occur (using mm/dd/yyyy format) or select the date using the available date picker. The selected date must be on or after today’s date.
- **Worker** - Click this drop-down arrow and select the worker who is to complete this visit.

☀ **Tip:** Staff included in this selection list are those with a caseload in the selected program as well as those with the “Include in Direct Care Staff Lists” permission assigned under System Setup > [Permissions Maintenance](#).

- **Start Time** - In this field, type the scheduled start time for this visit (using HH:MM AM/PM format).
- **End Time** - Only displayed once a start time value has been entered. A read-only value automatically calculated based on the **start time** and **estimated duration** values.
- **Estimated Duration** - In these fields, type the estimated visit duration in hours and minutes.
- **Service Location** - Click this drop-down arrow and select the location at which the visit is scheduled to take place. Available options include the client’s address from his/her face sheet, the last three previously used unique addresses used as service locations for this client (if any), and an option to **Add New** in the event that the necessary address is not listed.

📌 **Note:** If an “Other: Add New” address is specified, that value is informational only. It is not saved in a central service locations list, however it is synced to CellTrak as an extra address for informational purposes.

7. In the “Billing Information” portion of the page most information is populated for you automatically. Review the information in this portion of the page and/or make selections as follows:

- **Primary Diagnosis** - A read-only value (diagnosis and code) automatically pulled from the client’s [Diagnoses](#) records. Any adjustments to this information must be made within the AWARDS Medical module.

☀ **Tip:** In order for a diagnosis to be pulled in as “Primary,” its **Diagnosis Date** must be on or before the service date for the visit AND it must have an **Order Level** value of “Primary.”

- **Primary Insurance / ID Number** - A read-only value automatically pulled from the client’s [Certified Entitlements](#) records. Any adjustments to this information must be made within the AWARDS Entitlements module.

☀ **Tip:** In order for an insurance record to be pulled into these fields from the Certified Entitlements records, its **Effective Date** must be on or after the service date for the visit AND it must have a **Coordination of Benefits** value of “Primary.”

- **Procedure** - Click this drop-down arrow and select the procedure for which this visit is being scheduled.

☀ **Tip:** Available procedures in databases configured to use the BillingBuilder are those for the primary insurer (payer) for which the **EVV Procedure?** option was set (as detailed under [Configuring Billing Procedures for EVV](#)). In databases where the BillingBuilder is not in use, this selection list consists of a custom selection list configured by Foothold Technology behind-the-scenes.

8. Click **Save** to complete the data entry process. The visit schedule record is saved and a read-only report version is displayed.

The process of working with visit schedule records is now complete. All scheduled records are synced into the CellTrak mobile app, from where they can now be selected by the specified worker for verification / visit completion purposes. For more information, see [Completing a Visit](#).

Completing a Visit

The process of completing a visit - whether scheduled in AWARDS or unscheduled - is done by service providers using the CellTrak application on their mobile device. Documentation on this process is provided by CellTrak:

- [Using CellTrak to Document Patient Care](#)

Documenting Verified Visits

Once a visit has been completed by a service provider using the CellTrak mobile application, that provider can document the verified visit in AWARDS using the Services - Individual module's [Progress Notes](#) feature. To do so, complete the following steps from the AWARDS Home screen:

- ✦ **Tip:** Documentation does not require that the visit verification be synced to AWARDS from the CellTrak application. In some cases the sync may take up to 15 minutes to complete or there may be alerts that must be cleared by an administrator prior to syncing taking place. If the sync has not yet happened a progress note can still be entered for the visit. Once the sync completes, key information from the CellTrak application (actual visit times/duration, for example) will automatically replace the values you have specified for those items during the note data entry process.
- ✦ **Tip:** The following instructions detail only the key steps in the progress note data entry process, highlighting the EVV-specific components. For a complete run through of all progress notes functionality, including more detailed instructions on entering/updating progress notes, see [AWARDS Online Help](#).

1. Click **Charts** from the left-hand menu, and then click **Services - Individual**. A fly-out menu is displayed.
2. Click **Progress Notes**. The *Progress Notes Data Entry* page is displayed.
3. Click the **Client** drop-down arrow and select the client for whom the verified visit is to be documented.
4. Click **CONTINUE**. The *Progress Notes Editing Index* page is displayed.
5. Click the **Selected** radio button next to "New Note (Section)."
6. Click **CONTINUE**. The *Progress Note Data Entry Settings* page is displayed.
7. Configure the fields and options on this page as needed. There is one EVV-specific setting among these fields/options:
 - **Linked EVV Visit** - Click this drop-down arrow and select the visit this note is documenting. Available selections are categorized in the drop-down as follows:
 - **Unscheduled Visits** - Lists any visits not pre-scheduled using the AWARDS [Visit Schedule](#) feature, and instead recorded directly within the CellTrak mobile application or created by an administrator using the CellTrak Administration Portal. Unscheduled visits shown here are those for which a progress note is not yet linked. They are listed without an address, and display only the date and time at which they took place.
 - **Scheduled Visits** - Lists any visits scheduled for you using the AWARDS [Visit Schedule](#) feature that have not yet been linked to a progress note AND that have not yet been completed/verified in the CellTrak mobile application or that have been completed but for which the verification information has not yet synced to AWARDS from CellTrak. If you write a note for a scheduled visit, any manually selected start time, end time, and duration information for that note will be updated automatically once syncing takes

place to reflect the actual values from the visit if they are not the same. Keep in mind that scheduled visit notes cannot be e-signed until that syncing takes place.

- **Completed Visits** - Lists any visits scheduled for the note writer using the AWARDS [Visit Schedule](#) feature that have been completed in the CellTrak mobile application AND synced back to AWARDS from that application.

☀ **Tip:** Only the worker scheduled to complete a visit can see that visit in the “Scheduled” and “Completed” sections of the selection list. Any visits already linked to a progress note are excluded from the list.

📎 **Note:** Once a progress note is saved with a Linked EVV Visit selection, that selection becomes read-only and cannot be edited. If it is ever necessary to relinquish that linkage (for example, in the event that a mistake was made), you will need to manually delete the note in its entirety.

Once a linkage is selected, key note information for the note is automatically populated based on that selection and displayed on the page in read-only mode; for example, the note date and time.

8. Click **CONTINUE** and complete the note writing process, including entry of the note text on the *Progress Notes Composition* page.
9. Click **SAVE NOTE**. The progress note is saved and a read-only report version of the note is displayed on the confirmation page.

★ **Important!** If electronic signatures functionality is enabled for progress notes and the signing rules indicate that the note should be available for you to sign at this time, you have the option to sign the note directly from the confirmation page; however, in some cases the click to sign option is not available immediately. Specifically, signing requires that the visit verification has been synced to AWARDS from the CellTrak mobile application. If that sync has not yet completed, remember to check back at a later time to sign the note. For instructions on electronically signing progress notes, see [AWARDS Online Help](#).

The process of documenting a verified visit is now complete.

Using the Visit Schedule (EVV) ReportBuilder

The **Visit Schedule (EVV) ReportBuilder** is used to generate customized reports of Visit Information (pulled from the [Visit Schedule](#) feature), as well as Completed Visit Information (pulled from CellTrak mobile application data synced into AWARDS).

☀ **Tip:** EVV-related data variables are also available for inclusion in the [Progress Notes ReportBuilder](#) when run for EVV programs, including both scheduled and completed visit information.


To generate and save a Visit Schedule (EVV) ReportBuilder report that can be rerun in the future, to generate a single-use report, and to use and/or update an existing report format to generate a report, complete the following steps from the AWARDS Home screen:

☀ **Tip:** The following instructions provide an abbreviated walkthrough of the ReportBuilder generation process. For more detailed instructions on ReportBuilder settings and options, please refer to [AWARDS Online Help](#).

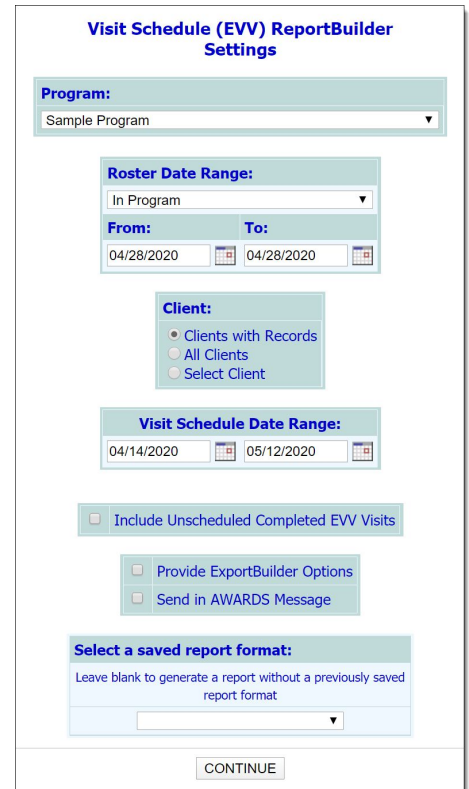
In addition, note that these instructions detail accessing the Visit Schedule (EVV) ReportBuilder from directly within the Visit Schedule feature; however, this report is also available in the [Reports](#) module, where it can be bookmarked for easy access.

1. Click **Charts** from the left-hand menu, and then click **Services - Individual**. A fly-out menu is displayed.
2. Click **Visit Schedule (EVV)**. The *Visit Schedule (EVV)* index page is displayed.
3. Click **Visit Schedule (EVV) ReportBuilder** from the left-hand menu. The *ReportBuilder Settings* page is displayed.
4. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available “All” or “Custom Grouping” selections.

5. Click **Roster Date Range** drop-down arrow and choose which clients are to be included in the report based on their program history.

 **Note:** *In the event that you are creating a new report format that will be saved, please be aware that the selection you make here is not saved with the report. It, along with the date ranges specified in steps 6 and 8, must be set each time the report is run.*

6. By default both **Roster Date Range** fields contain today's date to include in the report only those clients on the current roster. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers. When doing so please keep in mind that a two year period of your choosing is the maximum length of time for which the report can be run.
7. By default the report contents include all clients with records matching the report settings; any client *without* records matching those settings is excluded. If necessary, click one of the other **Client** radio buttons to make an adjustment to the included clients.
8. For the clients included in the report, contents are limited to visit schedules planned for dates at some point during the date range specified using the **Visit Schedule Date Range** fields on this page. By default that date range is set to report visits scheduled for a month, beginning two weeks prior to today through the two following weeks. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers. When doing so please keep in mind that a two year period of your choosing is the maximum length of time for which the report can be run.
9. By default the report contents are limited to records for visits scheduled within AWARDS; however, unscheduled visits may also be recorded in the CellTrak mobile application when needed. If those unscheduled visits should be included in the report as well, click the **Include Unscheduled Completed EVV Visits** checkbox.
10. Leave the **Provide ExportBuilder Options** checkbox *unchecked*. It is NOT relevant to report generation; it is only used to provide access to an ExportBuilder corresponding to this ReportBuilder.
11. To have the report (both its content and an Excel file version) sent to your AWARDS Messages module upon completion, click the **Send in AWARDS Message** checkbox. When this option is selected, you need not wait for the report to generate, and can navigate away from the ReportBuilder after finishing the configuration process.
12. Use the **Select a saved report format** drop-down options at the bottom of the page to specify whether you will be generating the report from scratch, or using a previously saved report format.
13. Click **CONTINUE**.



If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step **21**.

In all other instances, the *Options* page is displayed. Continue with step **14**.

14. The *Options* page contains a list of available report variables grouped by type, including two EVV-specific sections:

- **Visit Information** - Pulls from the Visit Schedule records in AWARDS.
- **Completed Visit Information** - Pulls from what has been recorded in the CellTrak mobile application and synced back in to AWARDS. If a data variable selected here has no data in the report content it is an indication that the visit is either not yet complete, or that the sync for it has not yet happened.

<input type="checkbox"/> Visit Information <input type="checkbox"/> Check All		
<input type="checkbox"/> Estimated Duration	<input type="checkbox"/> ID Number	<input type="checkbox"/> Primary Insurance
<input type="checkbox"/> Program	<input type="checkbox"/> Scheduled End Time	<input type="checkbox"/> Scheduled Service Location
<input type="checkbox"/> Scheduled Start Time	<input type="checkbox"/> Visit Schedule (EVV) ID	<input type="checkbox"/> Worker
<input type="checkbox"/> Completed Visit Information <input type="checkbox"/> Check All		
<input type="checkbox"/> Actual Duration	<input type="checkbox"/> Actual End Time	<input type="checkbox"/> Actual Service Date
<input type="checkbox"/> Actual Start Time	<input type="checkbox"/> EVV Event ID	<input type="checkbox"/> Record Lock
<input type="checkbox"/> Related Note	<input type="checkbox"/> Related Note ID	<input type="checkbox"/> Scheduled/Unscheduled

Click the checkbox next to each variable to be included in the report, and/or use the available **Check All** options as needed.

15. Click **CONTINUE**. The *Report Options - Continued* page is displayed.

16. Configure the options in the “Filter Options” portion of the page as necessary to adjust the scope of the report contents. Set the “Show Individual Detail” and/or “Summary Tables” options to adjust the way in which the contents are displayed.

17. To save the report settings so that this report can easily be re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

✳ **Tip:** If it is not necessary to save the report format and you want only to view the report contents, please skip to step **20**.

18. Configure the fields and options on this dialog box to indicate the specifics of how the format should be saved.

19. Click **Save Report Format**. The report format is saved and the *Report Options - Continued* page is re-displayed.

20. Click **DISPLAY REPORT**. The report is generated and displayed on the *ReportBuilder* page.

📧 **Note:** If you chose to send the report to yourself via the Messages module (in step **11**), a notice is displayed on the page to let you know that the report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report complete, and then proceed with step **21**. If you did NOT set that option, you can do so now by clicking **Send to AWARDS Messages**.

21. At this time, individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel.

The process of generating a Visit Schedule (EVV) ReportBuilder report is now complete.

Frequently Asked Questions

Can I include EVV information in the Service Contacts ReportBuilder?

No, currently EVV-related data variables are limited to inclusion in the Visit Schedule (EVV) and Progress Notes ReportBuilders only.

How do I unlink a visit from a progress note if I made a mistake?

If you accidentally linked the wrong visit to a progress note and want that visit to be returned to the **Linked EVV Visit** list, you must delete the incorrect progress note entirely. For more information on deleting progress notes, see [AWARDS Online Help](#).

Why can't I electronically sign a progress note for a linked EVV visit?

Electronically signing a progress note requires that the visit verification has been synced to AWARDS from the CellTrak mobile application. In some cases that sync may take up to 15 minutes to complete or there may be alerts that must be cleared by an administrator prior to syncing taking place. If the sync has not yet happened it will not have prevented you from writing the progress note, but you will be prohibited from signing it. Check back at a later time to sign the note once syncing is complete.

Additional Resources

The following resources, provided by CellTrak, may be useful to you in administering and/or using the CellTrak mobile application.

- [Activity Summary Report](#) - Training / demonstration video (3 min)
- [Common Device Issues](#) - A troubleshooting guide, including common registration errors
- [Licensing a Device](#) - Training / demonstration video (4 min)
- [Logging in and the Home Screen](#) - Training / demonstration video (4 min)
- [Introduction to the CellTrak App](#) - Demonstration animation (4 min)
- [Registering a User](#) - Training / demonstration video (7 min)
- [Secure Messaging](#) - Training / demonstration video (4 min)