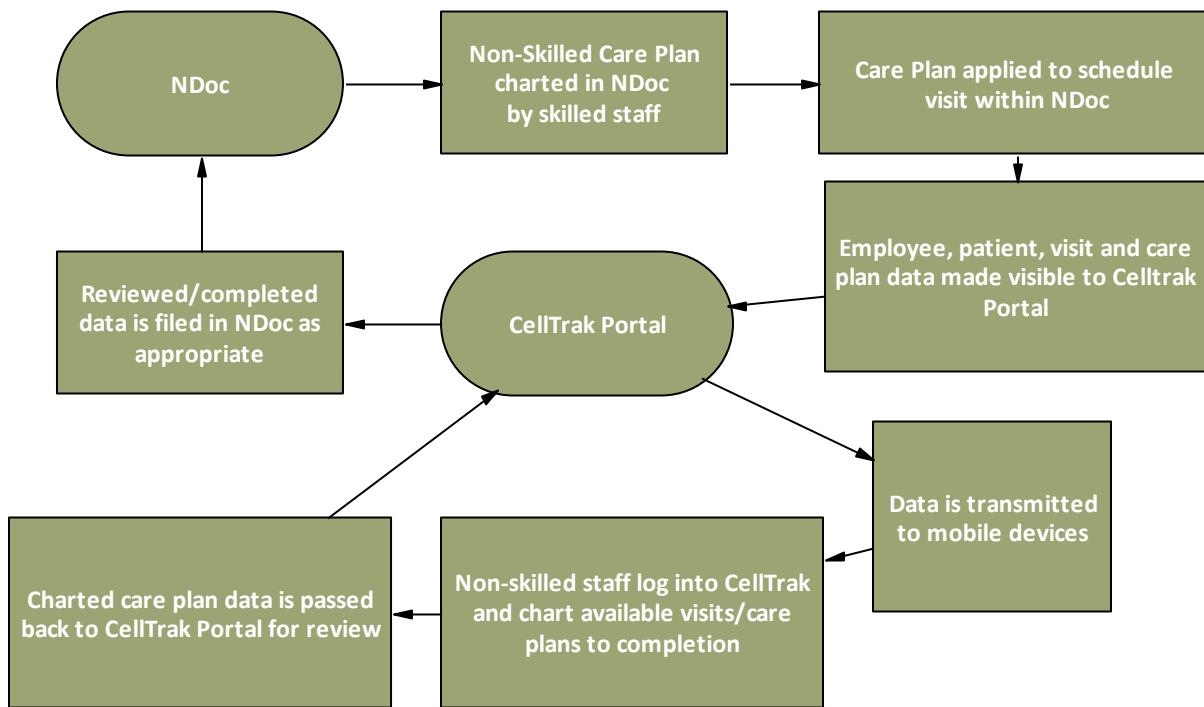


**Interface Purpose:**

This interface leverages NDoc's Non-Skilled Care Plan to the CellTrak Mobile Health Solution. Within CellTrak, users are prompted to chart the NDoc-driven care plan, after which, the visit files back in the NDoc patient record as complete.

**Workflow:**

**- Workflow Notes**

- Data to CellTrak** – Patient and care plan data are sent to CellTrak once a patient has a care plan created in NDoc. Patient and care plan data will stop actively updating CellTrak once the patient is discharged, or once no active care plan exists. Employee and Visit data are sent to CellTrak when an employee has been flagged as a “Mobile Device User” within the **Employee Table** and when a visit is scheduled with an active care plan tied to it. Visits, Care Plan, and Patient Information changes are sent to CellTrak once a day with a nightly process. “On the fly” changes to Visits and Care Plans will also update CellTrak as the changes are made, and will force a patient information update (thought Patient Infor changes do not update throughout the day on their own). Those changes are then leveraged out to devices based on a timeframe determined by CellTrak. Once a scheduled visit is in progress on a CellTrak device, the CellTrak Portal will no longer leverage updates to the device in relation to that visit.
- Data to NDoc** – Once charted on a CellTrak device, visits return to the CellTrak where, based on CellTrak settings, they will remain until any Alerts are cleared, or the visits are “Closed”. “Closed” visits are release to NDoc for import in batches based on a CellTrak Portal setting.

**File Content:**

NDoc to CellTrak	CellTrak to NDoc
Internal Visit ID	Internal Visit ID
Patient Account #	Patient Account #
Patient MR#	Patient MR#
Scheduled Patient and Non-Patient Visit Start/Stop Time	Actual Visit Start/Stop Time
Visit Comment	
Employee ID	Employee ID
Non-Skilled Care Plan Tasks	Non-Skilled Care Plan task responses
Non-Skilled Care Plan Narrative	Patient Signature

NDoc to CellTrak	CellTrak to NDoc
Patient Alert	Mileage
Patient Visit Address	Travel Time
Patient Name	Visit Narrative
Patient MR#	
Patient Account #	
Patient Location	
Patient Home Phone	
Patient DOB	
Patient Gender	
Patient Date of Death	
Patient Emergency Contact	
Patient Emergency Contact Phone*	
Patient Case Manager	
Patient Case Manager Team	
Patient Status	
Patient Discharge Date	
Patient Referral Date	
Patient Religion	
Patient Allergies	
Patient Primary Diagnosis	
Patient Diagnosis Code and Description; Other	
Patient Weight and Height	
Patient Safety and Safety Measures	
Patient Isolation and Special Precautions	
Patient Wound Safety and Risk to Fall	
Patient Current Diet and Fluid Restrictions	
Patient Mental State	
Patient Transfer/Ambulation and Activity/Functional Limits	
Devices: ADL (Dressing, Bathing, Eating)	
Supplies: Bowel/Bladder	
CPAP/Ventilator Settings	
O2 Administration, Frequency and Liters/min	
Patient Advance Directives and DNR	
Pharmacy and Pharmacy Phone #	
Primary Insurance	
Patient Attending Physician and Att. Phys. Phone #	
Primary Caregiver	
Employee Name, Discipline and Location/Company	

\*Patient Emergency Contact Phone – the first populated phone # field for the Emergency Contact will be included (cell, home or work)

#### Pre-requisite Settings:

- **Non-Skilled Care Plan** - The Non-Skilled Care Plan must be in use in order for care plans to transmit to CellTrak. Please review the **Non-Skilled Care Plan FASTForm** for detail regarding set-up, option, and use of this function.
  - **Restrictions** – Upon implementing the NDoc Mobile – CellTrak interface, Thornberry puts a setting in place that causes Category Comments in the care plans to become unavailable for charting, as these fields currently have no context for presenting to the Non-Skilled users within the CellTrak application. If in use prior to rollout, care plans created prior to the implementation will retain any charted values, but any new or carried forward care plans will not present the fields for use.
  - **Frequency** – Prior to CellTrak Portal verification training, customers should review the NDoc **Care Plan Frequency Table** under **Administration>System>Tables>Care Plan Frequency**, inactivating any frequencies deemed inappropriate or unnecessary. The remaining list of active frequencies drives the task-related **Frequency** dropdown in NDoc's Non-Skilled Care Plan function.

- **Care Plan Activity Response** – The default values available for charting of care plan tasks (other than those tasks identified as Clinical Measures – \*see Clinical Measures under “User Interaction”) are: Complete, Patient Refused, Other. Prior to CellTrak Portal verification training, customers should review the activity response options here, and inactivate or add as necessary.
  - **Frequency** – Prior to CellTrak Portal verification training, customers must indicate to Thornberry Ltd which activity responses, when charted, should count against the care plan frequency.
- **Address GPS** - All customers with CellTrak implemented will need to **establish a specific latitude/longitude for their patient, Company, Employee and Location** addresses. Taking the step to record address data accurately in the related tables and as part of your Intake and charting process will ensure your eventual GPS/EVV is as accurate as possible. Please review the GPS Charting video (*Video Resources within the Connected Care Reference section under Documentation*) for clarification regarding how to make use of this functionality as a part of your workflow in address entry via the Patient Referral, Visit Charting, or the Patient Profile.
- **Employee Table** – Prior to CellTrak Portal verification training, and ongoing once live, customers should ensure:
  - Employee **Street 1, Street 2, City, State and Zip Code** as well as **Phone#** are accurate within **Administration>Employee>Employee Table>Demographics**.
  - In order to ensure accurate mileage calculation within CellTrak, customers must also assign a **Primary Company** or **Primary Location** as appropriate within **Administration>Employee>Employee Table>Demographics**
  - In order for an employee to be made available to the CellTrak Portal, customers must indicate **Mobile Device User? Yes** within **Employee Table>Access**.
- **Patient Visits** – When scheduling patient visits in NDoc, the selected **Visit Reason** ties the visit to a Service Provided Code based on the discipline of the employee assigned. These visits are passed to CellTrak with a unique ID, so that when the completed visit is imported from CellTrak into NDoc, it will update the unique visit on the schedule with the appropriate visit date, start/stop time, mileage, travel time, and visit narrative.
  - **Service Provided Codes** – The Service Provided Code Table (**Administration>System>Tables>Service Provided Code**) needs to be configured to apply to the types of visits/services being offered. Although not required, agencies should set the applicable service provided codes for these visits as YES for the *Care Plan Required?-Y/N* option in cases of Non-Skilled Care plan charting. This will ensure that if changes need to be made to the visit within the charting screens that the Care Plan items will be accessible for oversight reasons. As noted, this Service Provided Code needs to be linked to the Visit Reason entry from the Visit Reason table under **Administration>System>Tables>Visit Reason**. This is the reason that is accessible when scheduling these visits.

Note the following considerations for the visits:

  - **Non-scheduled Patient Visits** – Should a non-scheduled patient visit be charted within CellTrak, upon import into NDoc, it will always inherit a single, default Service Provided Code designated by the customer during implementation. If using non-scheduled patient visits within CellTrak, customers must set up a Service Provided Code for this purpose and provide the code to Thornberry Ltd, so it can be configured as the default.
  - **Visit Exception** – In cases where non-skilled staff are unable to provide care for a patient visit, they can chart an exception within CellTrak, including a “Reason” for the exception. All visits charted within CellTrak as an exception, upon import into NDoc, will inherit a default Service Provided Code (one SP Code can be identified per discipline using the solution) designated by the customer during implementation. Customers must set up Service Provided Code (or codes) for this purpose and provide the code to Thornberry Ltd, so they can be configured as the default(s).
- **Non-Patient Visits** – When scheduling non-patient visits in NDoc, selecting an **Agency Reason** from the dropdown in NDoc allows that non-patient visit to be leveraged out to the CellTrak Portal.
  - **Agency Reason** – Prior to CellTrak Portal verification and training, customers should review and update their Agency Reason Table under **Administration>System>Tables>Agency Reason** to ensure it includes all possible non-patient visit reasons that might be appropriate for their CellTrak users going forward. Once the table is updated, please alert Thornberry Ltd.
- **Location/Company** – Within CellTrak, employees reflect as being tied to a specific “Location.” The equivalent can be tied to a specific Company or Location from NDoc in order to provide a means for mileage calculation. Prior to CellTrak Portal verification and training, customers should determine whether NDoc Company or Location is most appropriate for this use case and notify Thornberry Ltd., so we are passing the appropriate value.
- **Signee Type** – Within CellTrak, customers have the option of recording a patient signature and selecting a clarifying indicator of whom it was “Signed By.” The options in the CellTrak “Signed By” dropdown are driven from NDoc’s Signee Type table found under **Administration>System>Tables>Signee Type**. Customers should review the values in this table to ensure they represent any values they’d like their CellTrak users to be presented as an option. Prior to CellTrak Portal

verification and training, customers should provide Thornberry with the list of Signee Types they'd like presented w/in CellTrak based on this table.

**NDoc User Interaction:\***

- **Non-Skilled Care Plan functionality** – Although Non-Skilled Care Plans can be created in NDoc prior to implementing this interface, it is only once the NDoc Mobile – CellTrak interface is active and the data push to the CellTrak portal running that care plans can be exported for charting in CellTrak. Please review the previously mentioned Non-Skilled Care Plan FASTForm for the following clarifications: Creating Care Plans, Scheduling Care Plans with a visit, Changing the Care Plans, Reviewing the Care Plans, Inactivating the Care Plans, Employee Dashboard notifications, etc.
  - o **Clinical Measures** – All tasks under **Non-Skilled Care Plan>Recording>Vitals** have been configured with CellTrak to prompt for values that match the Vital Signs fields and logic within NDoc. When entries for **Non-Skilled Care Plan>Change in Condition** are included in a care plan, the CellTrak user will be prompted to indicate whether or not there was a change in each specific condition, and if there was, whether they contacted the office (and who they contacted).
- **Frequencies** – Each task in the Non-Skilled Care Plan has a frequency attached to it. Charting any task as Performed/Completed within CellTrak will count against the frequency as appropriate. Once the frequency requirements have been met for a given task, CellTrak users will no longer be presented with those tasks for charting during the given week. Once a visit completed in CellTrak is imported into NDoc, and immediate check is performed for charted tasks against the frequency for each task, and to ensure only relevant tasks are available for charting, the appropriately updated care plan is sent “on the fly” to CellTrak. Customers determine which activity response counts against the frequency during the implementation of the solution. The following frequencies include this logic, while tasks associated with any other frequency (as scheduled, every visit, etc.) will always present to the user.
  - o 4x week
  - o 3x week
  - o 2x week
  - o 1x week
  - o Every week

**Managing the Interface:**

- **Managing the Interface Activity** - Customers using the NDoc Mobile CellTrak solution can review a log of all visits completed in CellTrak that were successfully received and filed in NDoc via the interface under Reports>Interface>Interface Activity by selecting “VISITIN CELLTRAK” from the Interface list. The report includes the Employee ID, the Patient Id, and the visit Start/Stop times.
- **Managing Visit Exception Codes** – In the case of visits that are unable to be completed due to designated reasons (patient declined, refused, etc.) the default exception Service Provided Code, described above, is applied to the visit. To manage these visits and update the visit with an appropriate Service Provided Code, customers should refer to the Visit List Report under Reports>Visits. This report can be filtered by Service Provided Code to identify visits that have been set up with the default exception code. Using this information, customers can then go to Administration>Patient>Modify Charted Visits to update the visit where applicable.
- **Managing EVV Processes** – In cases where EVV is managed using CellTrak, agencies should refer to documentation under Documentation>Connected Care References for *EVV Configuration and Set-Up* and *EVV Management Functionality*.