**Medicaid Monthly Summaries**

This is a Medicaid only activity and must be done every month.

**Use a report to find Monthly Summaries on Medicaid Eligible Students**

1. **Report is located on your homepage under Reports**
   1. Header: Service Capture Implementation
   2. Report: User Monthly Progress Summaries – CHECK MONTHLY (highlighted blue)
   3. Action: Click on the report to open it
2. **How to use the report**
   1. Action: User the lookup link to the right of the Pink Staff field
   2. Search for yourself
   3. Action: Click on Select
   4. Your name will appear in the Pink Staff field box
   5. Action: Click on Blue Button Update Report with Values
   6. This will open so you may see all records that require a monthly progress summary
   7. Action: Click on the File Folder on the left side of the first row
   8. This will open up the service record
3. **How to work within the Service Records Profile**
   1. Action: Complete a new service record as a Monthly Progress Summary
   2. How to open an new Service Record
   3. Action: Click on the **+** next to “Add New Service Record”
   4. A Service Record Form should open up
4. **How to work within the Service Record**
   1. Action: Service Field – use the drop down to select your role
   2. Action: Service Type – Select **Monthly Progress Summary**
   3. Action: Service Date Time – select last school day of the month
   4. Action: Provider Notes – type a summation of services delivered for the month
   5. Action: Has this service been completed – check the box
   6. Action: Click on Green Action Button – Accept Changes
5. **Return to the report**
   1. Next to the student name
   2. Action: Click on report

**Goal is to empty the report of all names.**