**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.**