PowerSchool Tips for.....

Medicaid Monthly Progress Summaries

This is a Medicaid only activity and must be done every month. There is a report on your Home page to assist you with locating students who need a Monthly Progress Summary. As you complete the summaries, your report will shrink down. The goal is to empty the report of all services.

1. **Report is located on your homepage under Reports**
    a. Header/Bucket: Service Capture - Implementation
    b. Report: User Monthly Progress Summaries – CHECK MONTHLY (highlighted in blue)
    c. Click on the report to open it
2. **How to use the report**
    a. User the lookup link to the right of the Pink Staff field
    b. Search for yourself
    c. Click on Select
    d. Your name will appear in the Pink Staff field box
    e. Click on Update Report with Values button
    f. This will give you a list of all your service records that require a monthly progress summary
    g. Click on the File Folder on the left side of the first row
    h. This will open up that service record
3. **How to work within the Service Record   (RECOMMENDED)**
    a. Click on "Add Service Record"
    b. Select the Student Plan Type from the dropdown - (IEP/IFSP/ NPSP [Special Education])
    c. Select Service Provider Type – use the drop down to select your role
    d. Select Service Type – Select **Monthly Progress Summary**
    e. Enter Service Date and Time – select last school day of the month
    f. Progress Report – select Achieved
    g. Provider Notes – type a summation of services delivered for the month
    h. Under Areas Covered/Assessed – select **Monthly Summary** in dropdown
    i. Has this service been completed – check the box
    j. Click on blue "Accept Changes" button
4. **How to work within the Service Records Profile (without using the report/for students not on caseload)**
    a. Complete a new service record as a Monthly Progress Summary
    b. Click on "Add New Service Record"
    c. A Service Record Form should open up
5. **Return to the report**
    a. At the top of the page next to the student name….
    b. Click on report