**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. **Report is located on your homepage under Reports**

a. Header: Service Capture Implementation  
b. Report: **User Monthly Progress Summaries – CHECK MONTHLY** (highlighted blue)  
c. Action: Click on the report to open it

2. **How to use the report**
   a. Action: User the lookup link to the right of the Pink Staff field  
   b. Search for yourself  
   c. Action: Click on Select  
   d. Your name will appear in the Pink Staff field box  
   e. Action: Click on Blue Button Update Report with Values  
   f. This will open so you may see all records that require a monthly progress summary  
   g. Action: Click on the File Folder on the left side of the first row  
   h. This will open up the service record

3. **How to work within the Service Records Profile**
   a. Action: Complete a new service record as a Monthly Progress Summary  
   b. How to open a new Service Record  
   c. Action: Click on the + next to “Add New Service Record”  
   d. A Service Record Form should open up

4. **How to work within the Service Record**
   a. Action: Service Field – use the drop down to select your role  
   b. Action: Service Type – Select **Monthly Progress Summary**  
   c. Action: Service Date Time – select last school day of the month  
   d. Action: Provider Notes – type a summation of services delivered for the month  
   e. Action: Areas Covered/Assessed – **Monthly Summary**  
   f. Action: Has this service been completed – check the box  
   g. Action: Click on Green Action Button – Accept Changes

5. **Return to the report**
   a. Next to the student name  
   b. Action: Click on report