

Monthly Summary Wizard

A monthly summary is required for Medicaid eligible students to summarize services that have been recorded. They are required for billing and must cover overall progress for the month and include potential treatment plan changes. Monthly summaries should be dated the last school day of the month.

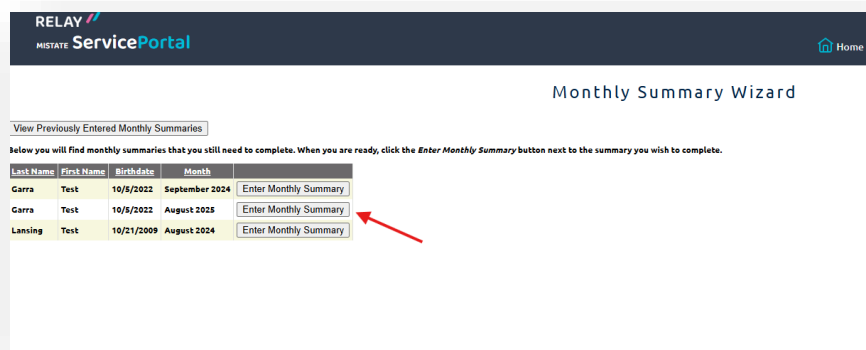
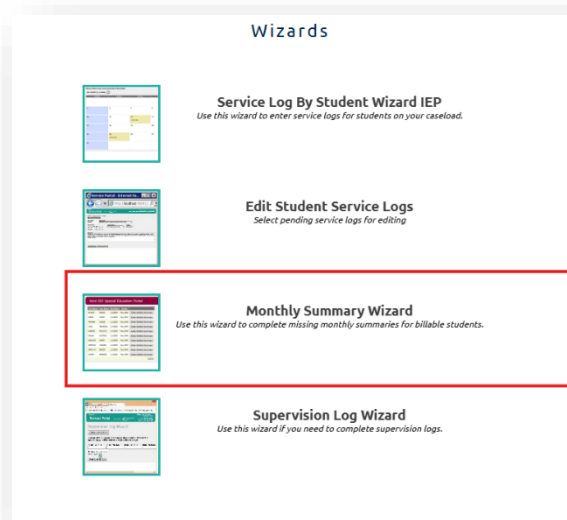
Step 1: Click on Wizards on the navigation bar.

You'll be taken to a screen containing different types of logging wizards

Select Monthly Summary Wizard.

Step 2: Select the student and month you wish to provide a monthly summary for

This list contains outstanding monthly summaries. The goal should be to complete your summaries at the end of each month.



Claims will not be sent to Medicaid if a monthly summary has not been completed. You have up to a year to complete any outstanding summaries.

Step 3: Enter the service date and comments

The service date should always be the last school day of the month. Comments must include overall progress for the month and include potential treatment plan changes. Save and Return to List.

Provider	Service Type	Service Date	Start Time	End Time	Group Size	Progress Report	Comments	Areas Covered
User: TestUser	OT Therapy-Individual	9/9/2024	9:00 AM	9:30 AM		Not Applicable	test entry to display monthly summaries	Neuromuscular Development
User: TestUser	OT Therapy-Individual	9/10/2024	9:00 AM	9:30 AM		Not Applicable	test entry to display monthly summaries	Neuromuscular Development
User: TestUser	OT Therapy-Individual	9/11/2024	9:00 AM	9:30 AM		Not Applicable	test entry to display monthly summaries	Neuromuscular Development

For more information or support:

Danielle Redman-
Medicaid Coordinator
Email: dredman@inghamisd.org
Phone: (517) 244.1208