

## End of Year Lumea™ Account Wrap-up Checklist

**Medicaid Key Items** – This is a great time to make sure you are caught up and will end the year with a clean account!

- Unposted Sessions Report
  - Get all old sessions updated and submitted/posted so they can be submitted for reimbursement within the 90-day filing deadline. Cleaning up sessions helps Service Providers start the new year positively
- Check the Service Provider Details and Activities Reports
  - Confirm all Service Providers that should be scheduling sessions doing so
- Review the Non-billable and Missing Information Reports in Secure Documents
  - Contact [Sharon](#) for guidance, support, and assistance
- Confirm Team Leaders have signed off on all sessions by Service Providers they supervise
  - Lumea sessions – Team Leader has posted all sessions submitted to them
  - Paper Logs – Service Provider has printed off all sessions logs, Team Leader has signed off on them, Admin has filed signed logs in Medicaid file for the student
- Prepare your Random Moment Time Study Calendar – due approximately August 1<sup>st</sup>
  - Sharon will be in touch to review the start and stop times and calendar groups
  - Accuracy of the calendar and appropriate “school/group” assignment will increase the likelihood that random moments occur when staff is expected to work
- Set reminder to submit July 5<sup>th</sup> rosters to [Sharon](#)

**Special Considerations** – These items are good to check on at the end of the year *if* your district participates in these items:

- Extended School Year Setup
  - Input ESY dates on calendar
  - Communicate with Out-of-District facilities on the transaction logs that need to be completed
- Review Professional Oversight Setting
  - Confirm Service Providers requiring Professional Oversight are assigned to a Team Leader
  - Confirm Team Leaders are posting sessions submitted to them
- Student Identify Verification
  - Ensure there are no duplications
  - Ensure all students are in Active **not** Pending status
- Out of District Students
  - Forward all logs to [Sharon](#) for Processing
- Complete January 5<sup>th</sup> Special Education Roster
  - Must include additional information to identify students with both Medicaid Eligible Services on IEP and Parental Consent as of January 5<sup>th</sup>.
  - See EDMS January 5<sup>th</sup> Roster Request [email](#)

**On-going but Good to Review** – These items are consistently reviewed throughout the year, but this is a great time to double check and plan for making some changes over Summer!

- Current Year Calendar Review
  - Be sure that all emergency closing/snow days, vacations, in-service days have been marked on the Calendar in Lumea – only mark days that were full non-student days, do not mark days that were partial attendance for students
  - Update your last day of school to reflect changes for unexpected closings
  - Contact [Sharon](#) if you have possible errors to correct
  - Input the School Year Calendar as it becomes final
- Caseload Management
  - Update Staff to Student Assignments as needed – ESY, new year, new staff
  - Update Team Leader Caseloads as needed – program changes, new staff
  - All staff requiring supervision have Professional Oversight turned on
- Update Student Details
  - Important fields that change annually – grade, school,
  - Other considerations – Contact information, Okay to Bill, District of Liability
  - Exit students that have aged out, no longer receive services, or have left the district
- Update User Details
  - Remove old users from account – reassign their caseload first
  - Review and update credentials as needed
  - Ensure providers have the correct State-approved Provider Type
  - Adjust Permissions and Roles if needed