Lumea™

Required Administrative Items

User Guide

Maine Administrators

EDMS Customer Care

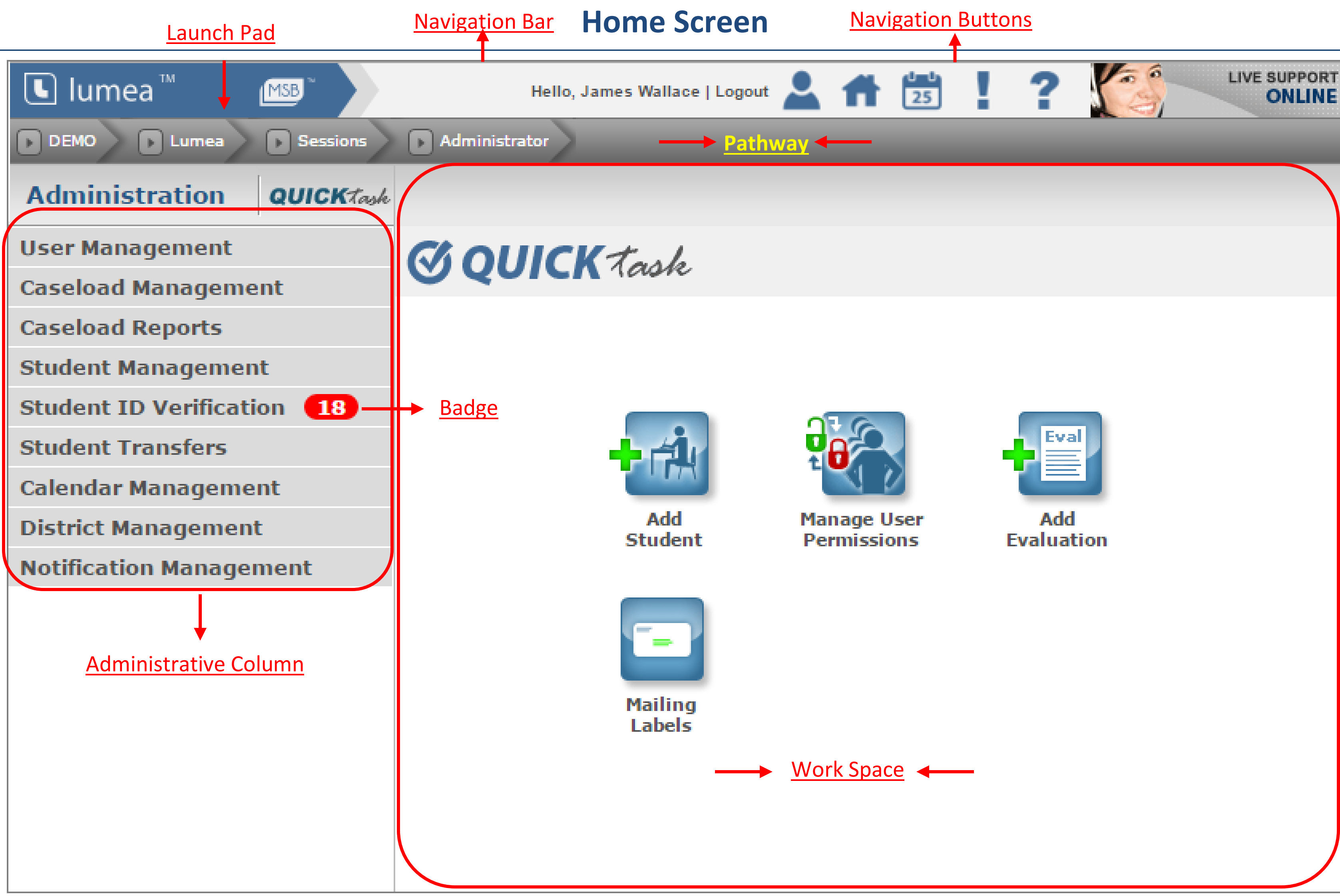
800.810.4220

support@eddatasolutions.com

eddatasolutions.com

Contents

Home Screen


Launch Pad
Navigation Bar
Navigation Buttons
lumea TM
MSB
Hello, James Wallace | Logout
25
LIVE SUPPORT
ONLINE
DEMO
Lumea
Sessions
Administrator
Pathway
Administration
QUICKtask
User Management
Caseload Management
Caseload Reports
Student Management
Student ID Verification 18
Student Transfers
Calendar Management
District Management
Notification Management
Badge
QUICKtask
Eval
Add Student
Manage User Permissions
Add Evaluation
Mailing Labels
Administrative Column
Work Space

Introduction

What is this workbook all about?

In the following pages, you will find all the fields in Lumea that a Lumea Administrator will need to update throughout the year to ensure Medicaid billing is processed for your school district. We provide step-by-step instructions and screenshots to assist you with all workspaces. Please contact your Program Specialist or Claims Analyst with any questions.
Before you get started, we thought it might be helpful to provide you with a quick summary of some of the ways that Lumea helps your district with information that is utilized for Medicaid claiming and documentation purposes.

Lumea allows districts to store student specific information in Student Details that is required for claiming:

- Name
- Date of birth
- Gender
- Medicaid identification number
- District of liability

The following fields found in Student Details either allow or restrict claims from being submitted, depending on how they are indicated, and whether they are used by districts:

Field Name – Student Information Tab	Selections/Field Type	Note
Parent/Guardian Medicaid Consent Signed	Radio button: Y / N / R / None Selected	A "Y" or "None Selected" allows claiming unless Parental Consent Start or End Dates (see below) further restrict claiming; an "N" or "R" selection restricts claiming from occurring. **Note**: An "N" selection means the district has not received consent. An "R" selection indicates the parent has specifically refused to provide or has revoked consent
Parental Consent Start Date	Date field	When provided, no claims will be submitted for dates of service prior to the date set; however, claims may have been submitted for dates of service prior to the date being set
Parental Consent End Date	Date field	When provided, no claims will be submitted for dates of service following the date set; however, claims may have been submitted before the date was set
Medicaid #	Open text field	EDMS does regular "matching" with the state database to collect and store this number in Lumea; without a Medicaid id, no claiming can occur. To facilitate Medicaid ID matching, please be sure student's name is spelled correctly with full legal first name in first name field and full legal last name in last name field. Nicknames or extraneous data in these two fields may result in no match found.

Bill Medicaid as of date	Date field	When a date is provided, no claiming will occur prior to that date; however, it is possible claims were submitted prior to the date being set
Medicaid billing stop date	Date field	When a date is provided, no claiming will occur after that date; however, it is possible claims were submitted prior to the date being set
Okay to bill Medicaid	Radio button: Y / N / None Selected	If set to “Y” or “None Selected”, claiming can occur; if set to “N”, no claiming will occur
If yes, bill for SAC	Radio button: Y / N / None Selected	If set to “Y” or “None Selected”, claiming can occur; if set to “N”, no claiming will occur
SAC Status Effective Date	Date field	When effective date is entered, “bill for SAC” instructions begin on the effective date entered
Exit Date	Date field	When a date is provided, no claiming will occur after that date, however, it is possible claims were submitted prior to the date being set
Is the Student a Special Education student?	Dropdown field: No selection / Y / N	If set to “No selection or “Y”, claiming can occur; if set to “N”, no claiming will occur

For any service types the district intends to claim per student, the district must add records in the billing dates tab including the following:

Field Name – Billing Dates Tab	Selections/Field Type	Note
Start Date	Date field	
End Date	Date field	
Service Type	Dropdown	
Prior Authorization Number	Open text field	Only for Section 65 CBHDT or Section 28 RCS
ICD-10 Code	Open text field	Be sure Lumea verifies code entered as Valid code
Ready to Bill section ##	Radio button: Y / N / None Selected	

For claims to be processed, Lumea requires current credentials, including type and dates, be provided in the User Details area of each service provider. Without credential records that cover the dates of service, claims cannot be submitted. EDMS does not provide oversight with respect to credentials beyond either allowing or restricting claims from being submitted based on the credentials and dates as added by the district. Additionally, OT, PT and Speech providers must also be linked to the district’s MaineCare portal account in order to avoid claims being rejected by MaineCare.

EDMS in no way monitors or restricts claiming based on whether or not a Covered Service meets any of the following criteria (if any of the following are not in place, the district would have to restrict claiming by utilizing one of the fields described above, i.e. *Okay to Bill Medicaid – “N”*):

1) Is ordered in an IEP
2) Is appropriately documented in a Plan of Care, Plan of Service, or Individual Treatment Plan, if applicable
3) Has been appropriately authorized (order, referral, recommendation) by a licensed practitioner of the healing arts, physician, or appropriate authorizer of services under Medicaid policy
4) Is considered to be medically necessary or medically appropriate
5) Is supported adequately by the appropriate plan (i.e. IEP, ITP, POC, etc.)
6) Is supported adequately by evaluations
7) Service narratives, progress notes, or other descriptions are available, maintained for the appropriate amount of time, and adequate

Now that we've reviewed the basics, let's get started!

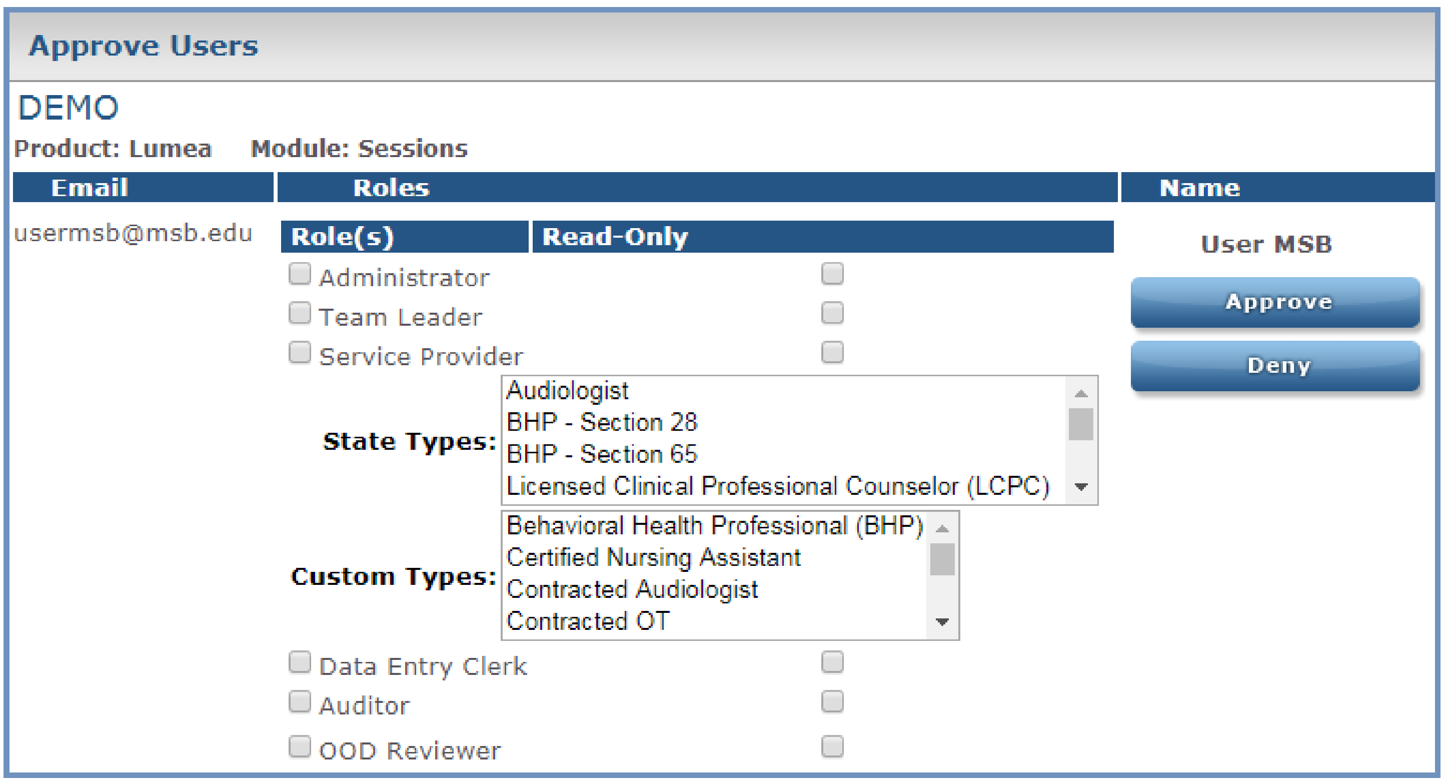
User Management

User Approval

If new Service Providers, Administrators, or Team Leaders register for the District's Lumea account, make sure to approve them so you can give them access, roles, and permissions.

1) In the Administration menu, select User Management>User Approval

2) Find the Users you wish to approve in the Workspace



3) Check the appropriate role(s) and select Approve to grant the user access to the account

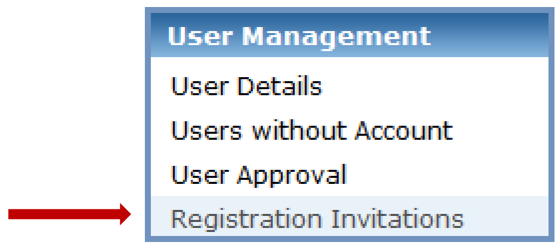
NOTE: Any role can be made "read-only" using the read-only check box. Read-only users will have access to the same information as other users with that role, but editing is restricted.

EDMS Registration Invitation Process

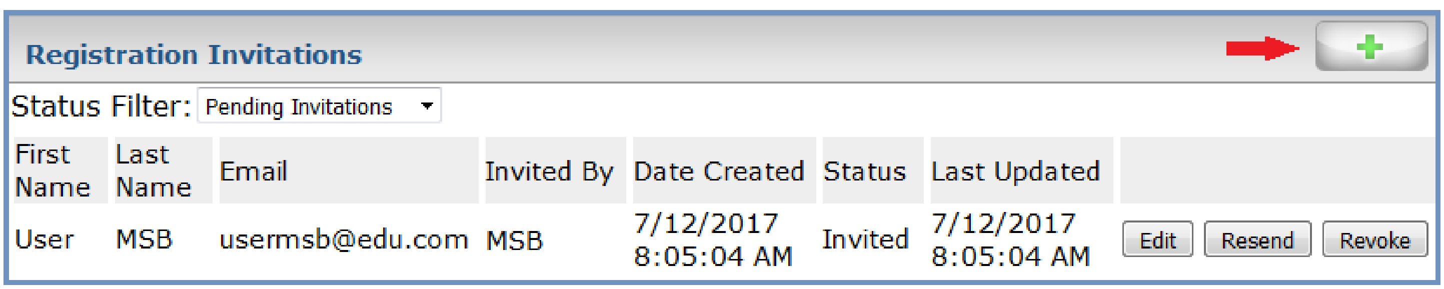
As an alternative to the user requesting access and requiring approval, administrators may also use the Registration Invitation process on the following pages.

Accessing Registration Invitations

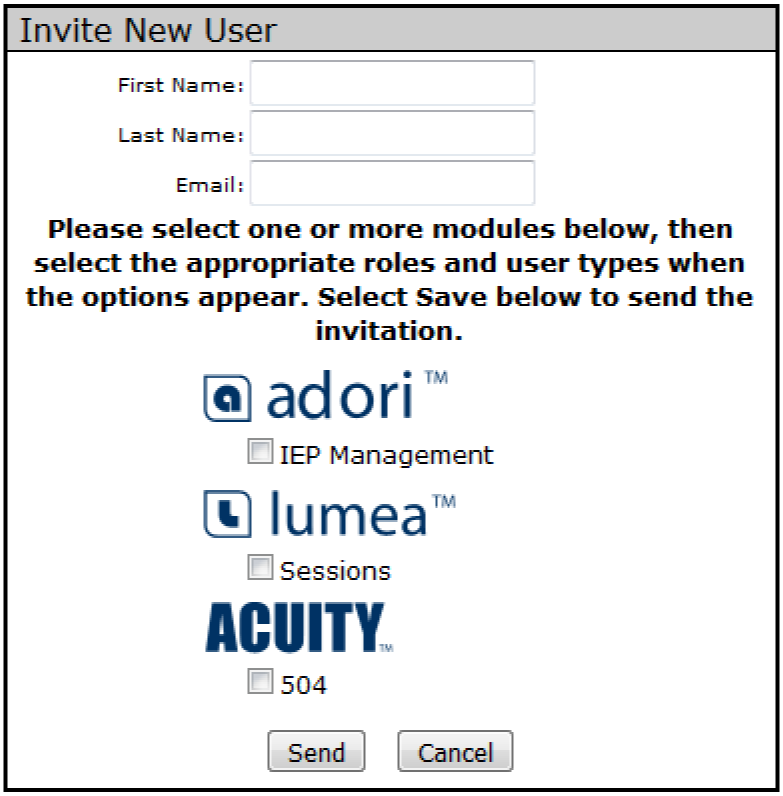
1) Go to User Management > User Details and click on Registration Invitations



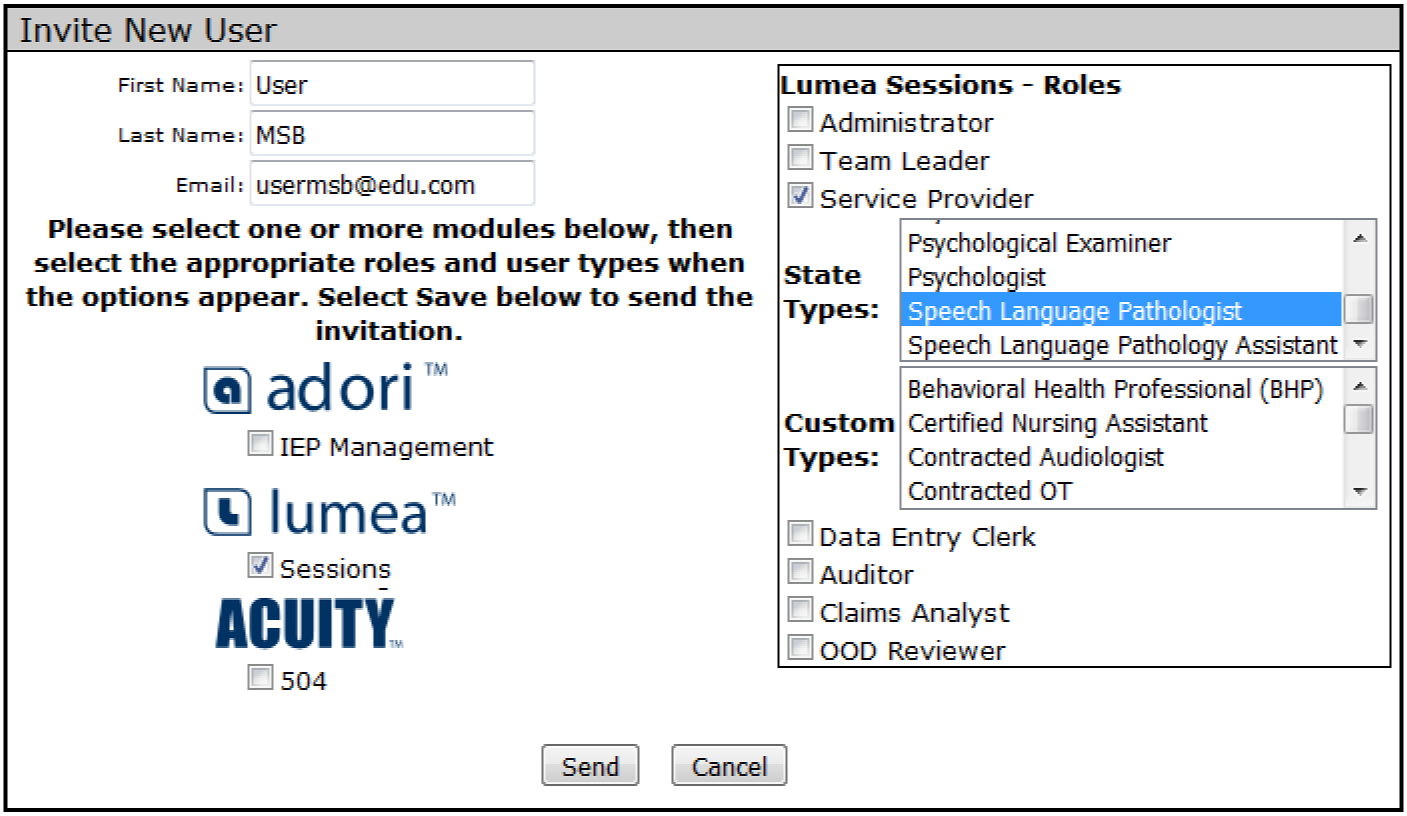
2) To send a new registration invitation click on the  icon.



3) Type in the first name, last name, and email address of the recipient and select the appropriate module.



4) Selecting a module will also allow you to select the recipient's role and type(s), if applicable.



5) When you have completed filling out and selecting all appropriate fields, click the Send button.

6) The saved information will display. You will have the option to Edit, Resend, or Revoke the Invitation.

7) To view other statuses of a registration invitation, click on the Status Filter drop-down menu.

Registration Invitations

Status Filter: Pending Invitations

First Name	Last Name	Email	Invited By	Date Created	Status	Last Updated	
User	MSB	usermsb@edu.com	MSB	7/12/2017 8:05:04 AM	Invited	7/12/2017 8:05:04 AM	Edit Resend Revoke

8) The pending user will receive an email message along with instructions on the final steps to complete the registration process.

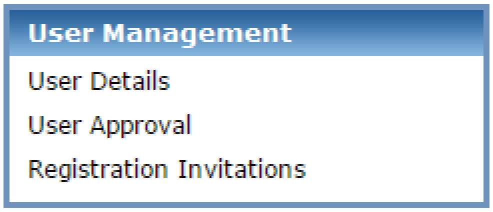
Professional Oversight Signature

If a Service Provider's sessions require a Professional's signature for oversight, this can be set under User Details by following the steps below.

Note: When setting professional oversight for a Service Provider, it is critical that the Service Provider be assigned to a Team Leader's caseload so the Team Leader may sign off on the Provider's sessions.

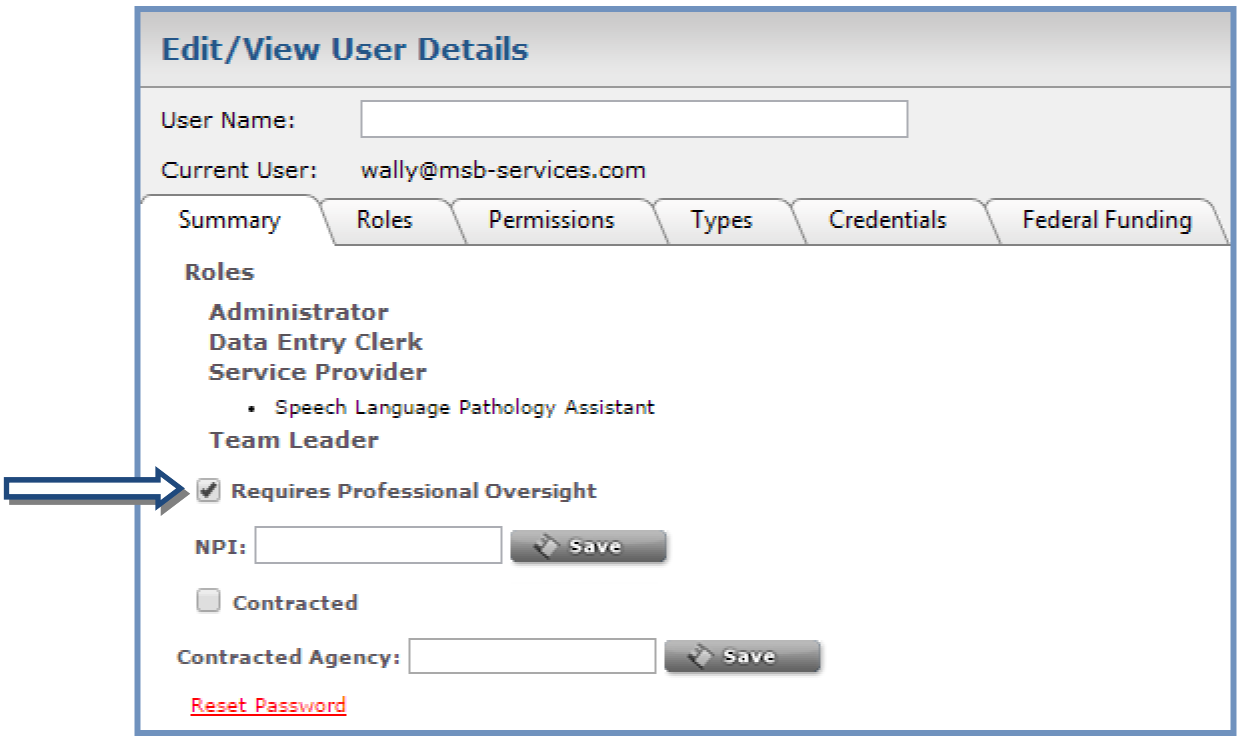
If Professional Oversight is removed from a Service Provider, any submitted sessions on the Provider's calendar with be changed from Submitted to Posted because the Provider will no longer require a Professional's signature.

1) In the Administration menu, select User Management>User Details



2) Select "Edit/View" next to appropriate user

3) In the Summary tab, check the box for "Requires Professional Oversight"



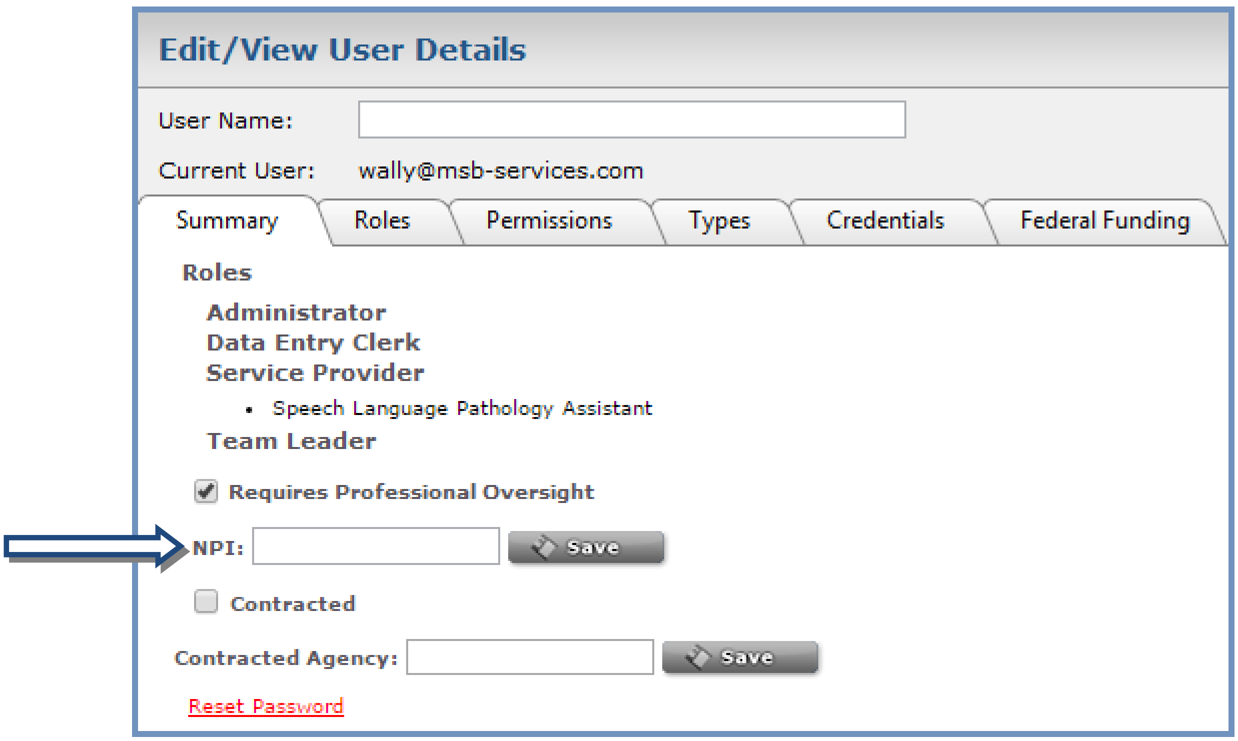
4) If the provider is contracted, check the Contracted box and enter their agency name under Contracted Agency.

Add Service Provider NPI

NOTES

- Service Provider NPI numbers are only required for OT, PT, and Speech service providers. Claims for Section 28 and Section 65 are submitted with the district NPI.
- NPI information for all licensed providers is available at https://nppes.cms.hhs.gov
- Please contact your EDMS Claims Analyst-, if you need assistance, when new PT, OT, or Speech providers are hired by your district as they will need to be added to your district's MaineCare account before services will become eligible for billing. EDMS can no longer complete this step on behalf of school districts since the provider's social security number must be entered.
- Service Providers may also add or edit their NPI in their profile

1) Select User Management/User Details from the Administrative Column
2) Select **Edit/View** next to appropriate user
3) Enter Service Provider's NPI number



4) Select **Save** to complete

Add Service Provider Type

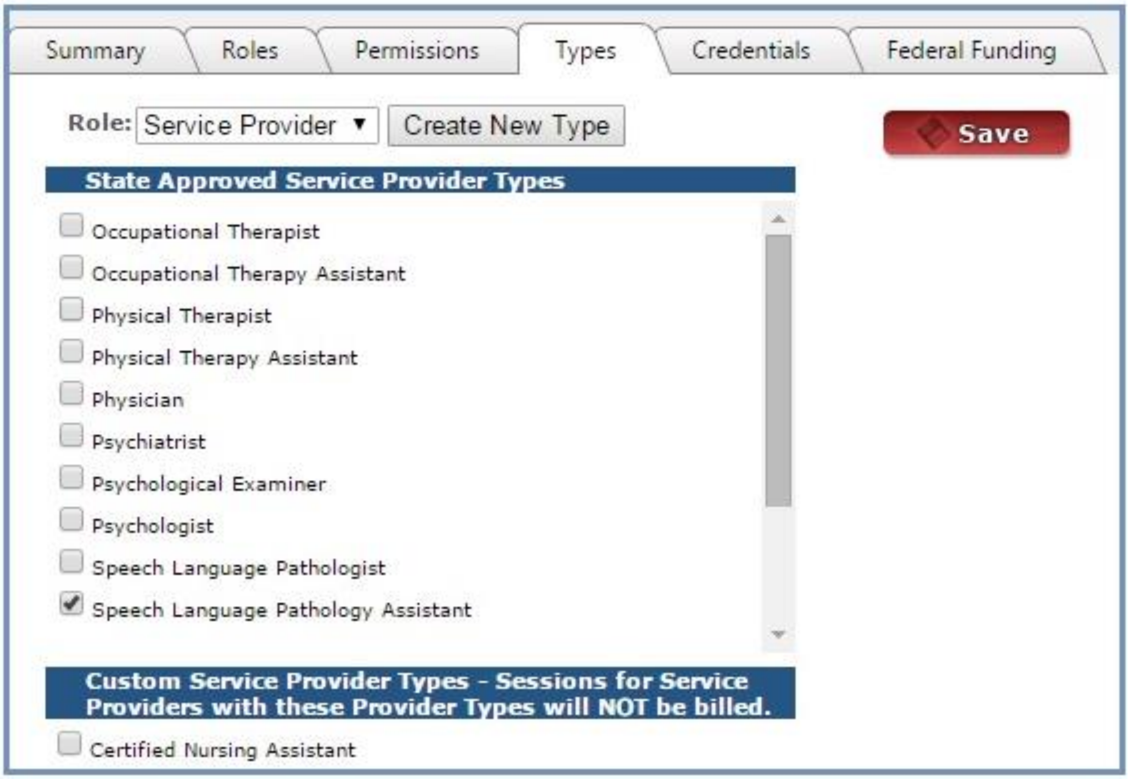
1) In the Administration menu, select User Management>User Details

2) Select **Edit/View** next to the appropriate user

3) Select the Types tab

4) In the Role drop-down box, select "Service Provider"

5) Select the State Approved Service Provider Types that apply to the selected Service Provider



6) Select **Save**

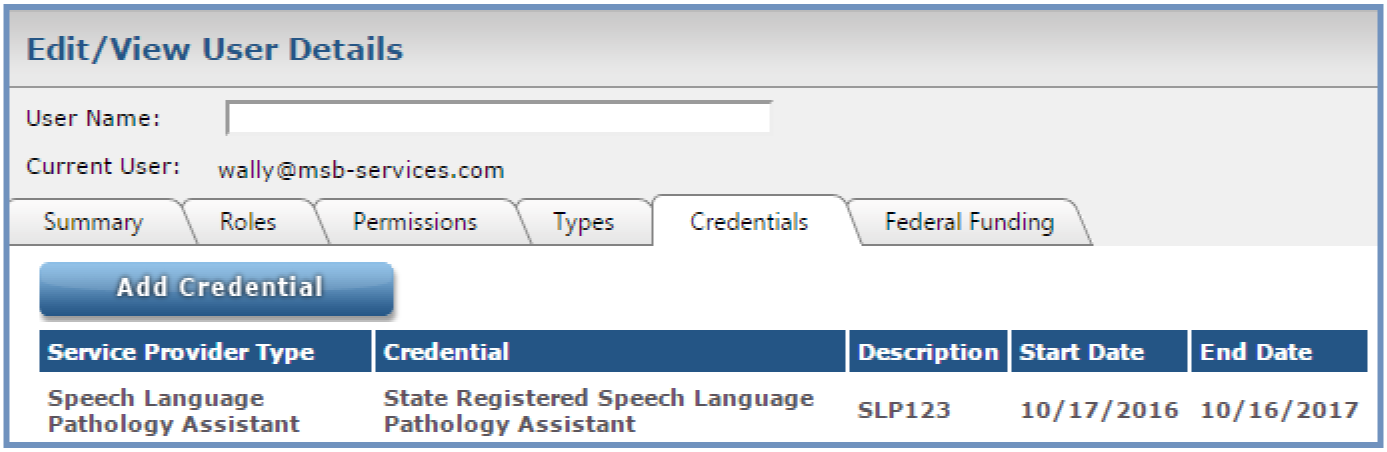
NOTE: *Only State Approved Service Provider Types are billable. Contact your Program Specialist or Claims Analyst if you have questions regarding Custom Provider Types.*

Add Service Provider Credential

1) In the Administration menu, select User Management>User Details

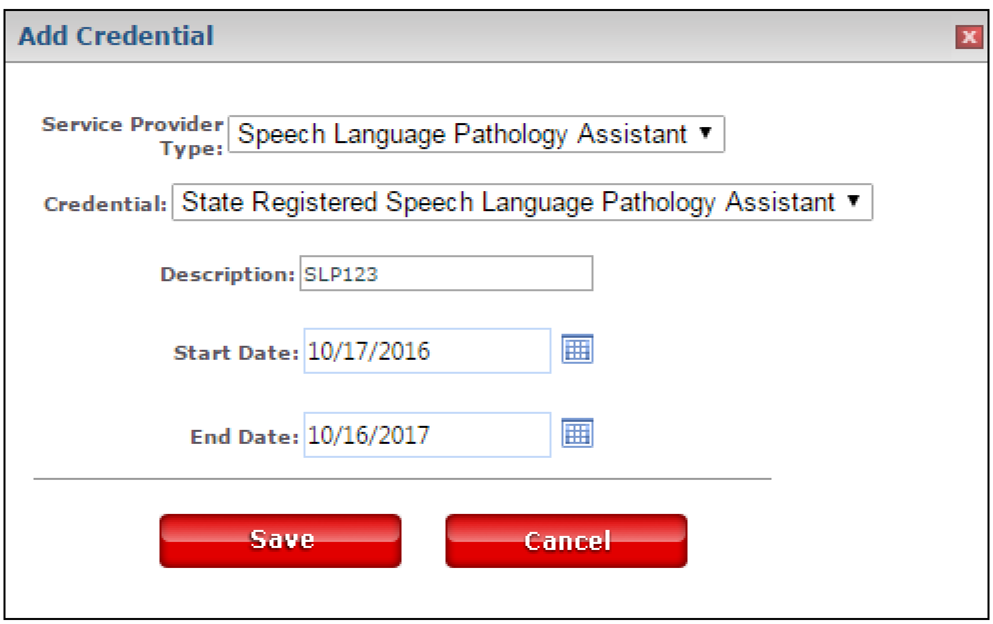
2) Select **Edit/View** next to the appropriate user

3) Select the Credentials tab



4) Select **Add Credential**

5) Enter appropriate information



NOTE: To edit an existing credential record, please contact your district's EDMS Claims Analyst

Submit Rates Template

NOTE: Claims will not be processed until a rate is obtained for the provider(s). The rates template must be submitted annually, however any time a practitioner's rate or Federally Funded status changes, or a new practitioner is hired, EDMS requires updated rate information.

EDMS requires that a rates template be submitted showing salary and benefits information for all providers as well as indicating which providers are federally funded and the federal funding amount.

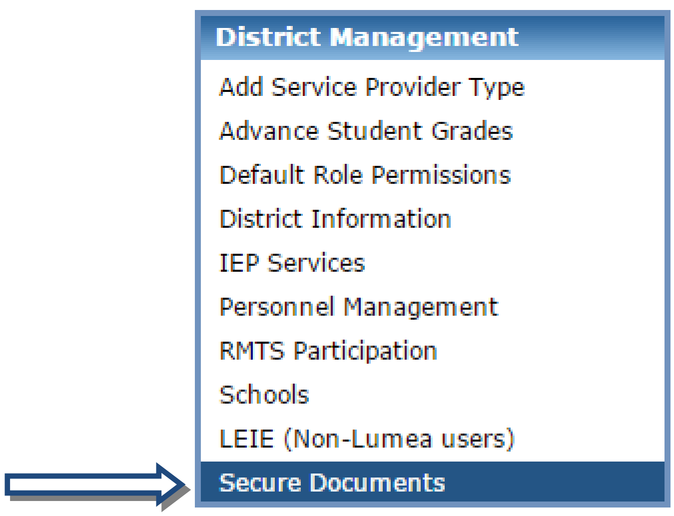
1) Access the rate sheet via EDMS's website by:

   a. Clicking here or
   b. From Lumea

      i. Select EDMS from the Launchpad
      ii. Select Resources/Maine Resources/Maine General
      iii. Select the current Practitioner Rates Calculation template

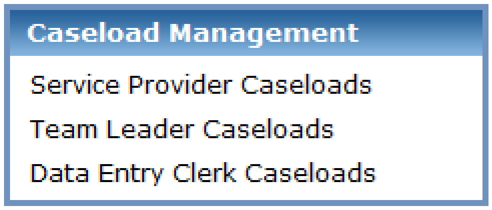
2) Fill out the Excel template. Include Service Provider Dates of Birth to ensure they are checked against the List of Excluded Individuals and Entities (LEIE) and the General Services Administration's Excluded Persons List System (EPLS)

3) Send the completed rates template to your EDMS Claims Analyst or upload to the Secure Documents area under District Management in Lumea. If you choose the Secure Documents option, be sure to let your EDMS Claims Analyst know you have uploaded the file.



Caseload Management

Administrators and Team Leaders, if assigned the “Manage Caseloads” permission, can manage caseloads in the Caseload Management folder.



- Service Providers have a caseload of students
- Team Leaders and Data Entry Clerks have a caseload of Service Providers

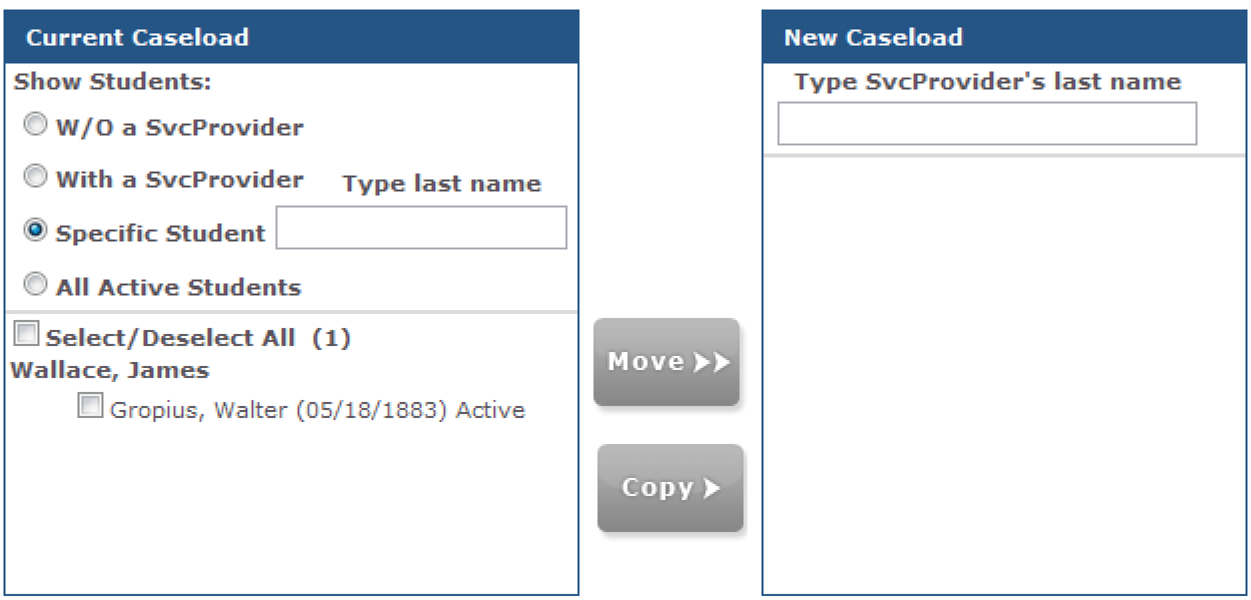
In all cases, Caseload Management is managed with two windows – the Current Caseload window and the New Caseload window.

Service Providers

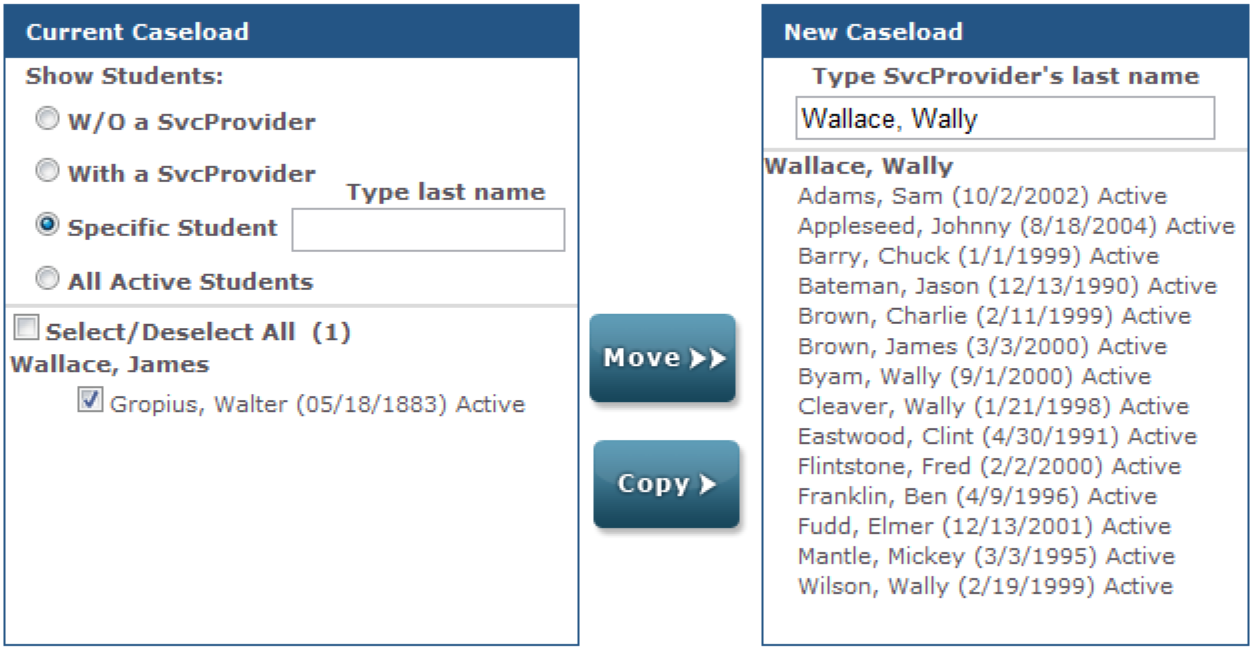
Filters are available in the Current Caseload window to refine the list of students that will show in Current Caseload list.

Assign Students to a Service Provider

1) Locate student(s) in the “Current Caseload” pane on the left



2) Type the name of the new Service Provider in the “New Caseload” pane. The Service Provider’s existing caseload will display



3) Select the check box next to each appropriate student in the “Current Caseload” window

4) You have two options when assigning student(s) to the new Service Provider:

a. 

will move the student from the current caseload to the new caseload

b. 

will copy the student from the current caseload to the new caseload and leave the student in the current caseload as well

5) The student will appear in the New Caseload list

Remove Student from a Service Provider

1) Select Service Provider from drop-down in the “Current Caseload” window

2) Select the check box next to each student to remove

3) Select 

at the bottom of the workspace

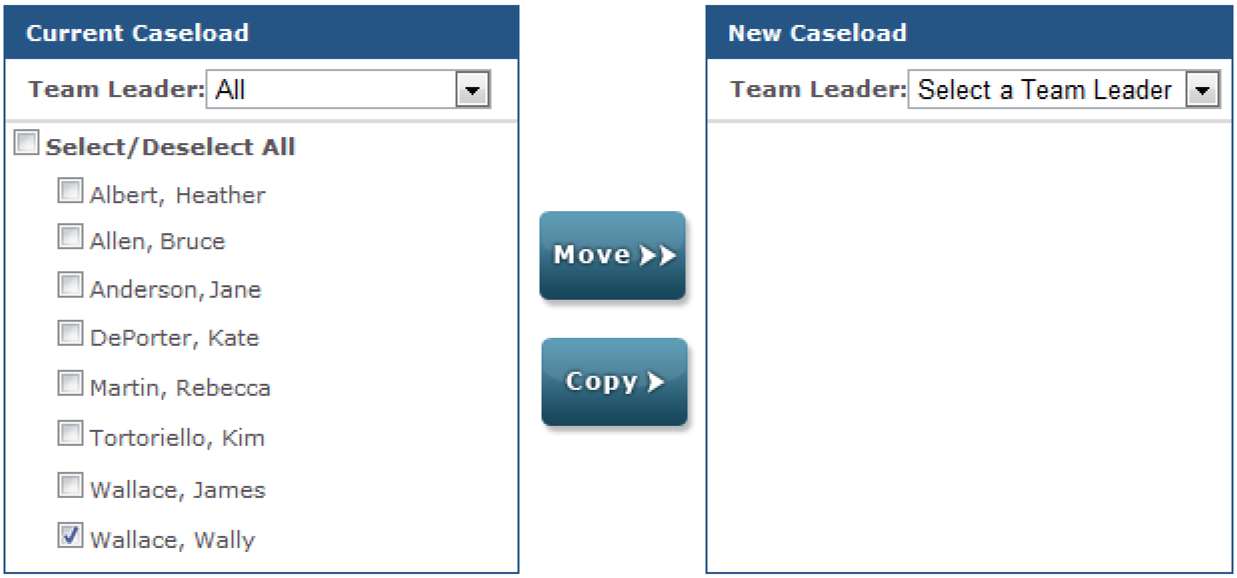
Team Leaders and Data Entry Clerks

The examples shown are for Team Leader Caseloads, but Data Entry Clerks work the same way.

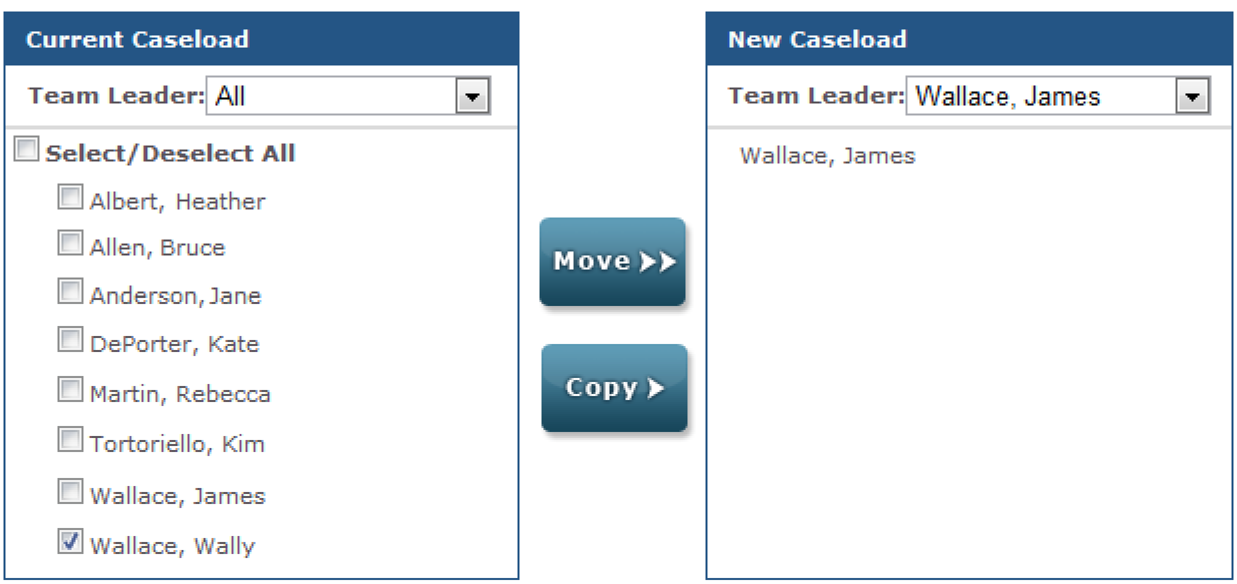
Assign Service Providers to a Team Leader or Data Entry Clerk

1) In the "Current Caseload" window, check the box next to the Service Provider you wish to add to a Team Leader's caseload.

NOTE: You may choose a Team Leader from the drop down list to view that Team Leader's caseload



2) In the "New Caseload" window on the right, choose the new Team Leader from the drop down list



3) You have two options to assign Service Provider to the new Team Leader:

a. 

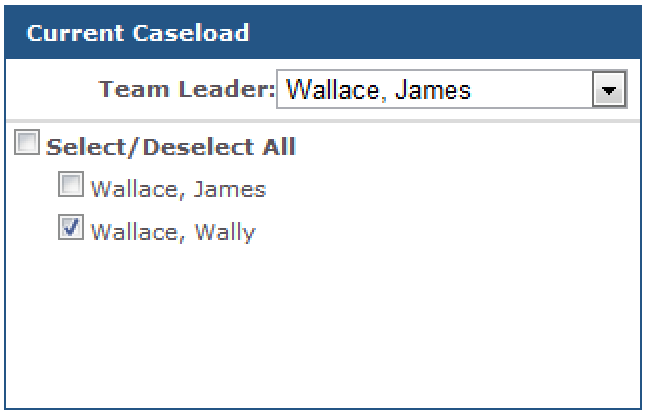
will move the Service Provider from the current caseload to the new caseload

b. 

will copy the Service Provider from the current caseload to the new caseload and leave the Service Provider in the current caseload as well

Remove Service Provider from a Team Leader

1) Select Team Leader from drop-down in the "Current Caseload" window



2) Select the check box next to each Service Provider to remove

3) Select 

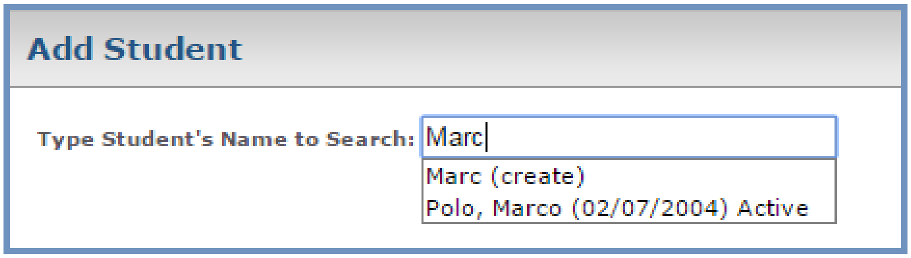
at the bottom of the workspace

Add a Student

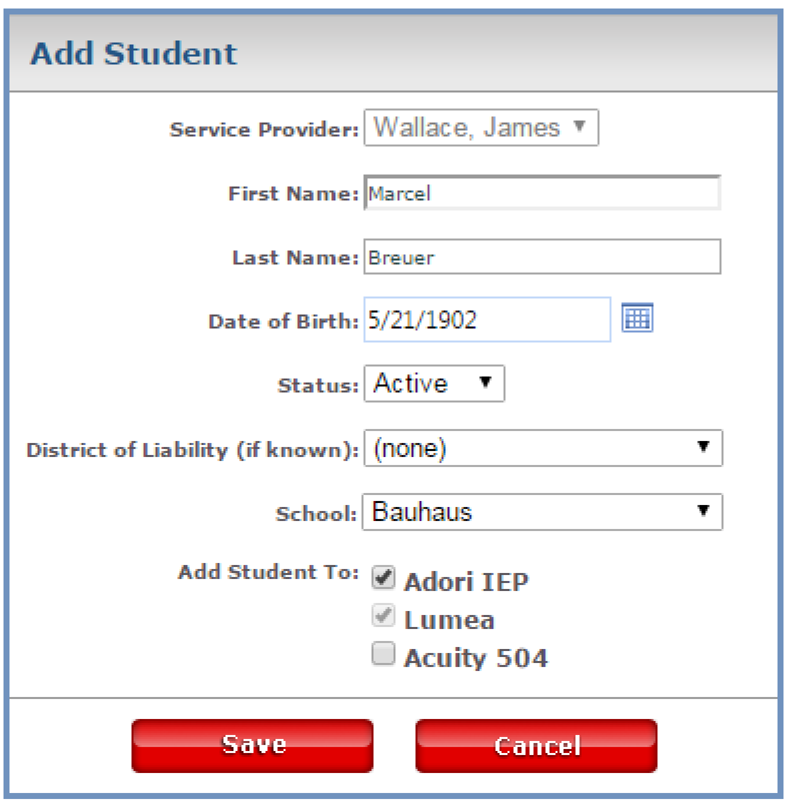
1) Select 

in the Student Details ***Workspace***

2) In the Add Student ***Workspace***, enter the student's name to determine if student exists in the database. If the student's name exists, select the name from drop-down to display the student's information. If student's name does not appear in the list, select the first option in list that states "(create)"



3) If selecting "(create)," enter in appropriate information. Please use the child's legal first and last names, spelled correctly. This helps to facilitate discovery of a child's Medicaid ID.



4) Select 

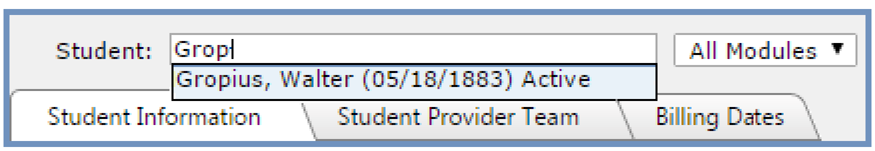
when done

Update Student Details

NOTE: Dates within the Medicaid Information and Parental Consent sections, as well as a student's Exit date, if applicable, control whether or not sessions for all service areas can be submitted for billing. Managing submission of sessions by a specific service area can be done through the Billing Dates Tab.

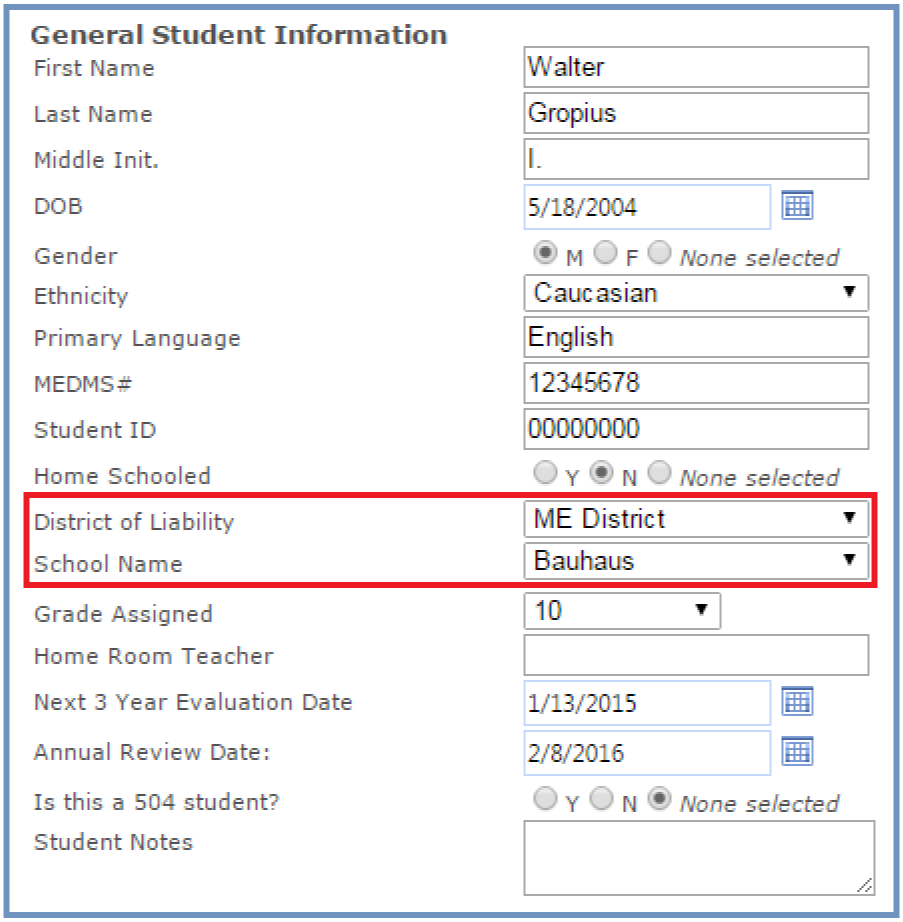
1) In the Administration Menu, select Student Management>Student Details

2) Search for Student by typing all or part of the student's name in the student search field box, then select the student's name from the list.



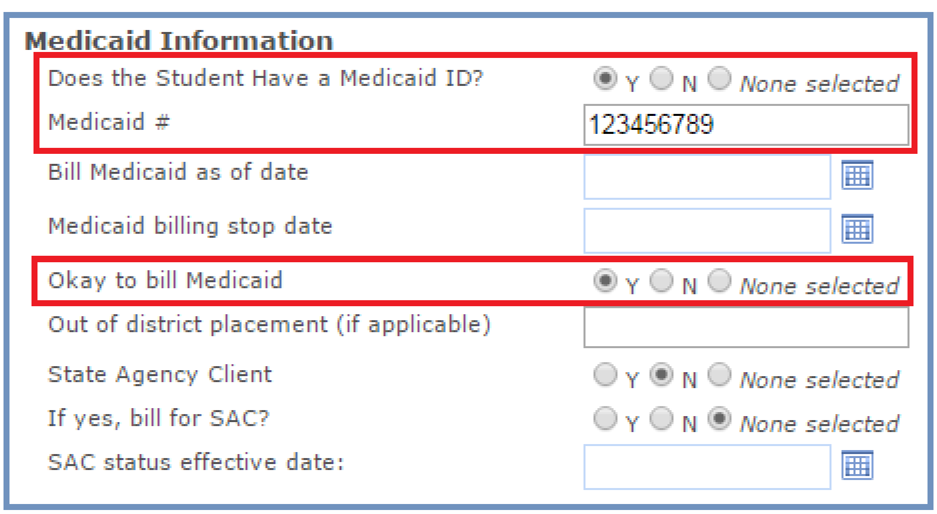
3) Update the following under General Student Information as needed:

   a. District of Liability
   b. School Name
   c. Grade Assigned



4) Update the following under Medicaid Information:

   a. Does the Student Have a Medicaid ID?
   b. Medicaid # – update if known, otherwise, EDMS periodically searches for eligibility on students with posted sessions.
   c. Okay to bill Medicaid (None selected or Yes indicates billing is allowed) – This field automatically defaults to No for all new students.
   d. Select Save

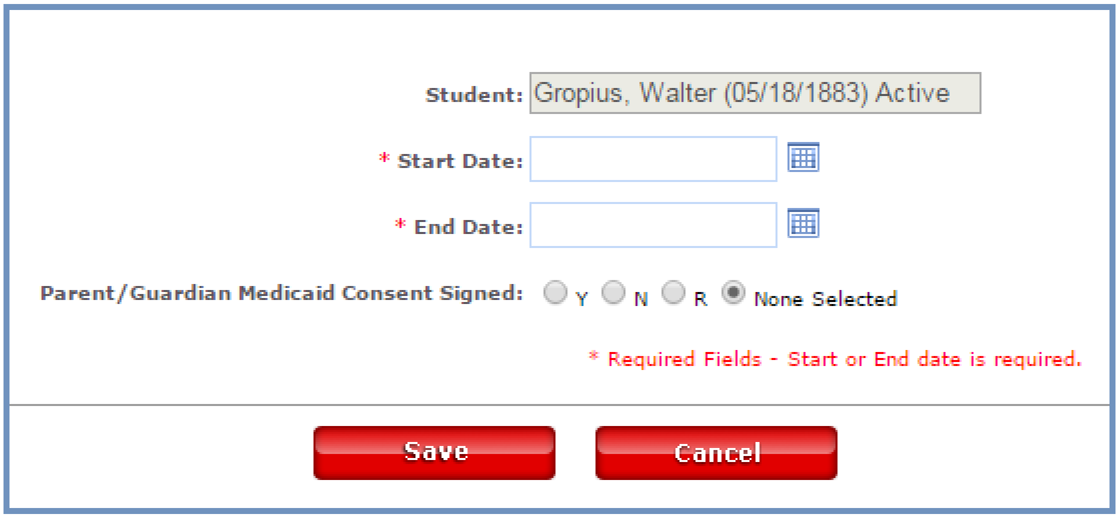


5) Update the following under Parental Consent:

NOTE: As of July 19, 2013, Maine state special education regulations no longer require annual parental consent. After July 19, 2013, the school district may utilize the one-time consent. Once you have obtained a one-time consent (no IEP dates on form) and have provided the Annual Notification of Parental Consent Rights, you may add a new one-time parental consent record if you would like to track this information in Lumea. If you have any further questions, please contact your Claims Analyst or Program Specialist.

a. Select Add Parental Consent Date

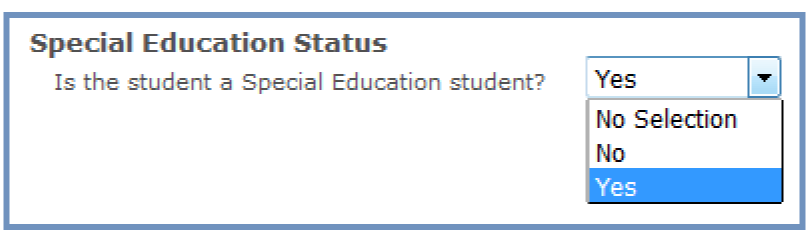
b. Enter the date of parental consent signature as the start date and leave the end date blank



c. Select Save

NOTE: If a parent ever revokes consent, then an end date for the active Parental Consent record must be added. Then a new Parental Consent record should be added with the date of revocation and the Parent/Guardian Medicaid Consent Signed toggled to R (Revoked). **Sessions that have not yet been billed will be not be released for billing once the revocation record has been added.**

6) Update the following under Special Education Status as appropriate



7) Select Save

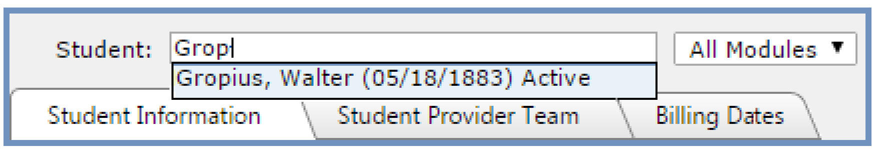
Billing Dates Tab

As of October 1, 2015, the appropriate ICD-10 codes must be entered for each student receiving Speech and Hearing, Occupational Therapy, Physical Therapy, Section 65 CBHDT, and/or Section 28 RCS services in Lumea. Guidance and best practice indicate that practitioners who are ordering/referring IEP ordered health-related services should be choosing the appropriate diagnosis/ICD-10 codes instead of using a default code. Thus, claims with dates of service beginning Oct 1, 2015 will require an ICD-10 code to be supplied by the district in Lumea before the claims can be processed. Billing can be controlled within the Billing Dates Tab by service section (i.e. OT, Sec 65, etc.); each Section can have different start and end billing dates, if applicable. Sec. 65 and 28 require Prior Authorizations submitted by your district to KEPRO to be added to Lumea once approved. Your Claims Analyst can assist you with management of this area; please contact them if you have any questions.

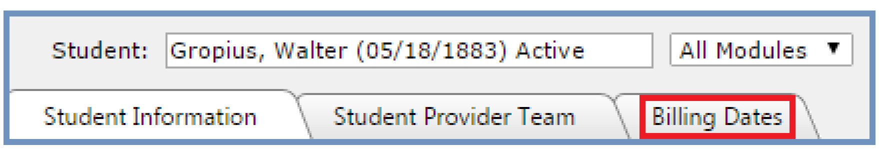
NOTES: *Yes* or *None Selected* under "Ready to Bill" indicates that billing is allowed.

- Any new students added will be defaulted to *No* for OK to Bill Medicaid.

1) Select Student Management from the Administrative Column
2) Select Student Details
3) Search for Student by typing all or part of the student's last name in the search box.

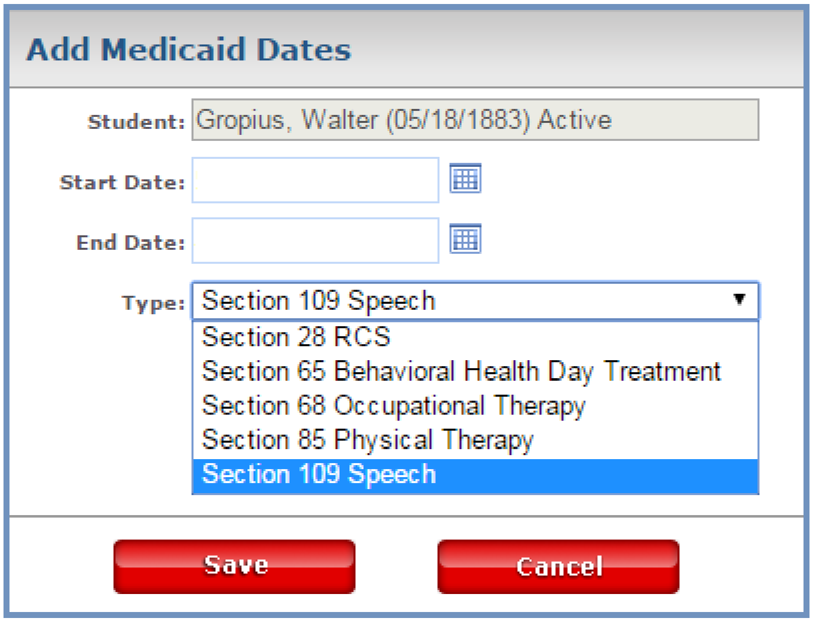


4) Select Billing Dates tab



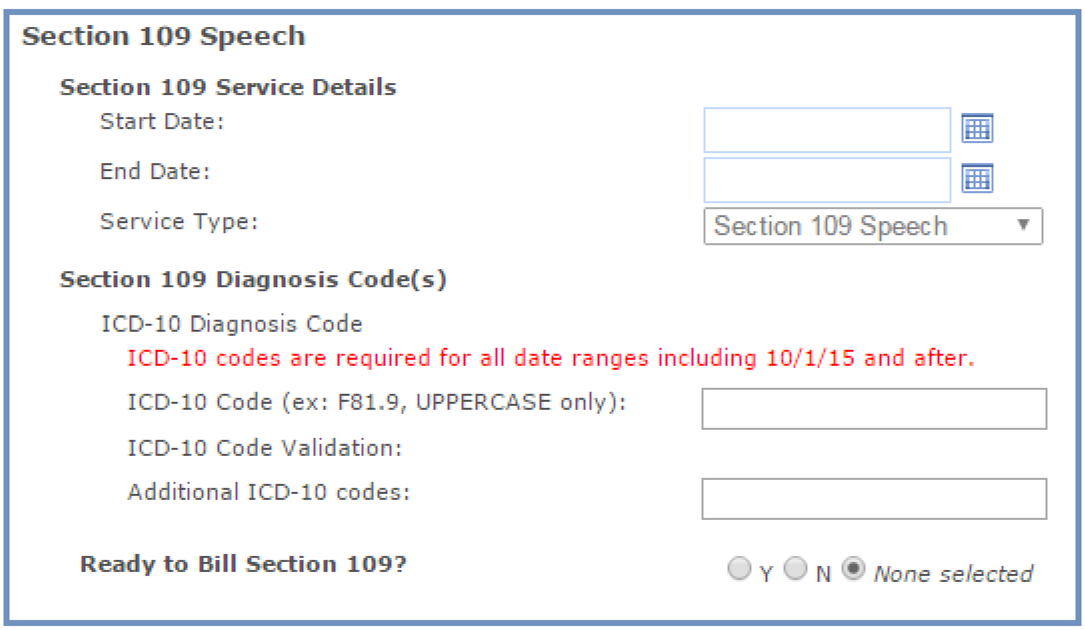
5) Select  Action Icon

6) Enter approriate start and/or end dates and the appropriate billing section, or leave dates blank for OT, PT or Speech if there are no date restrictions for those services.



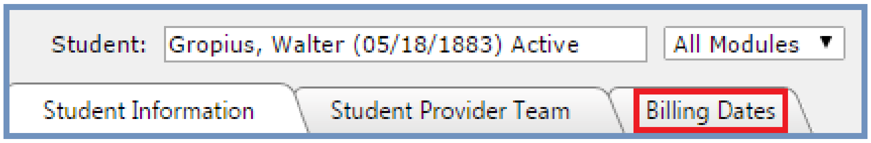
7) Select 

8) In the workspace, navigate to the appropriate service section and edit as necessary. ICD-10 codes are required for all service areas. Lumea will verify valid ICD-10 codes. If the ICD-10 Code Validation line shows “Invalid” after saving, please correct the ICD-10 Code.



Sections 28 and 65

If billing for Section 65 (including testing services) and/or Section 28, specific information is required in the Billing Dates tab.

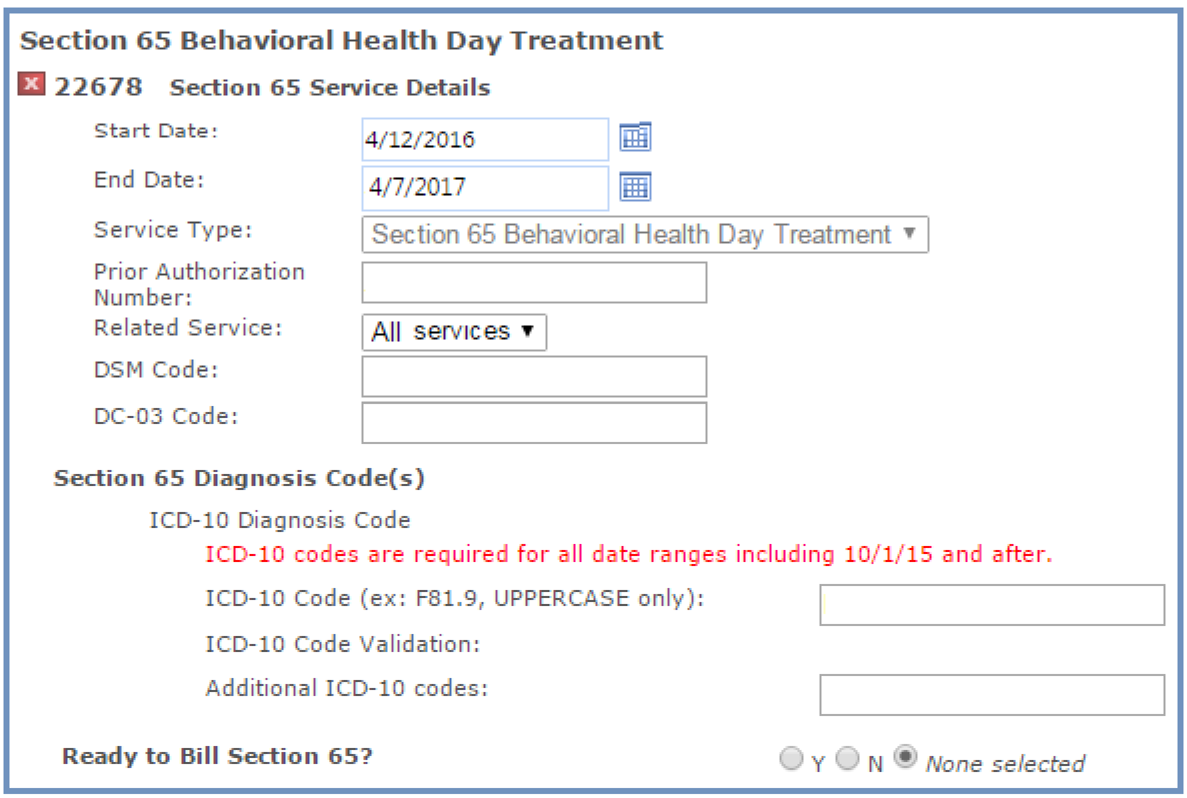


Section 65 CBHDT

If billing for Section 65 CBHDT, update the following under Section 65 Behavioral Health Day Treatment:

1) Start Date and End Date (must fall within Prior Authorization start and end date)
2) Prior Authorization Number — including KEPRO prefix (except Section 65 testing, which is covered below)
3) Related Service (must correspond with related service on Prior Authorization)
4) Diagnosis Code (ICD-10)
5) Ready to bill? (None selected or Yes indicates billing is allowed)

NOTE: If you provide the needed information to your Claims Analyst, they will be happy to input this information on your behalf. Please contact your Claims Analyst for assistance.

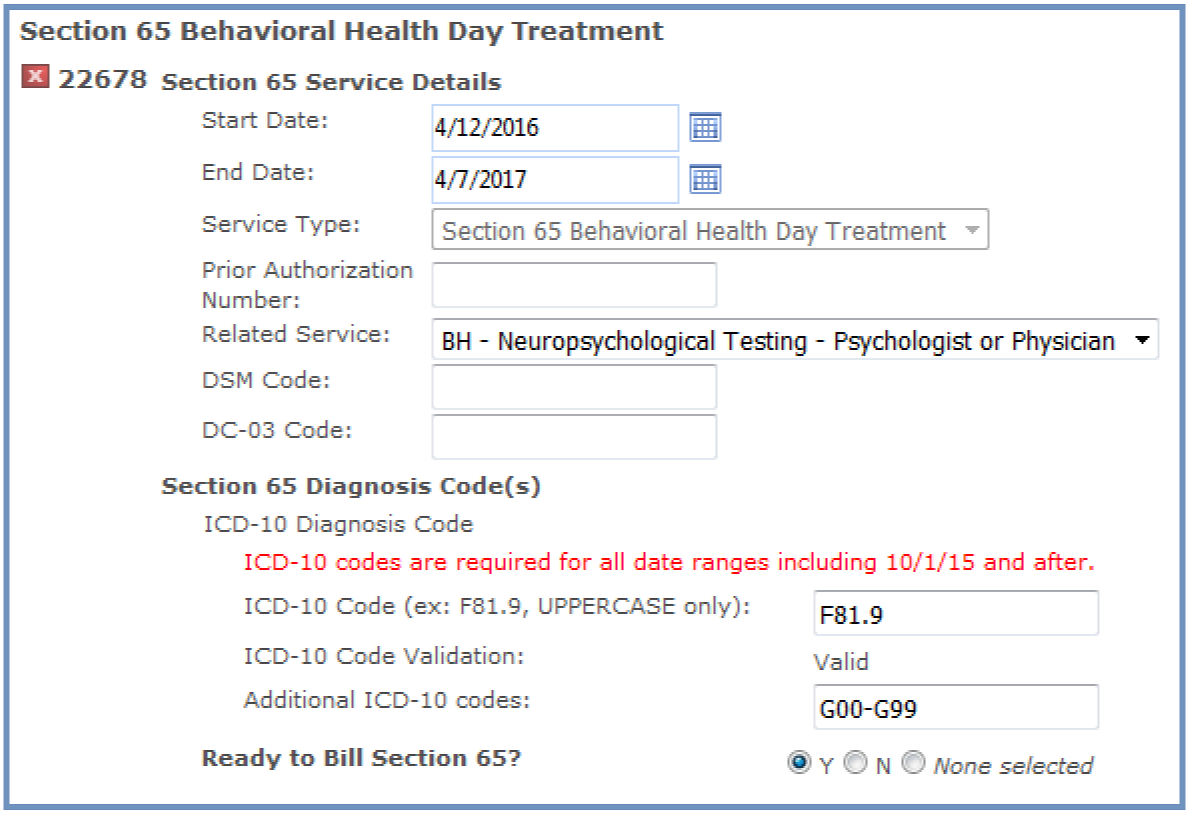


6) Select 

Section 65 Testing

If billing for Section 65 Psychological Testing, Neuropsychological Testing, or Neurobehavioral Status Exam, update the following under Section 65 Behavioral Health Day Treatment:

1) Start Date and End dates – optional
2) Prior Authorization – **LEAVE BLANK** – any data in this field will cause claims to deny
3) Related Service – choose according to service rendered and the provider's credentials
4) Diagnosis Code (ICD-10)
5) Ready to bill? (*None selected* or *Yes* indicates billing is allowed)



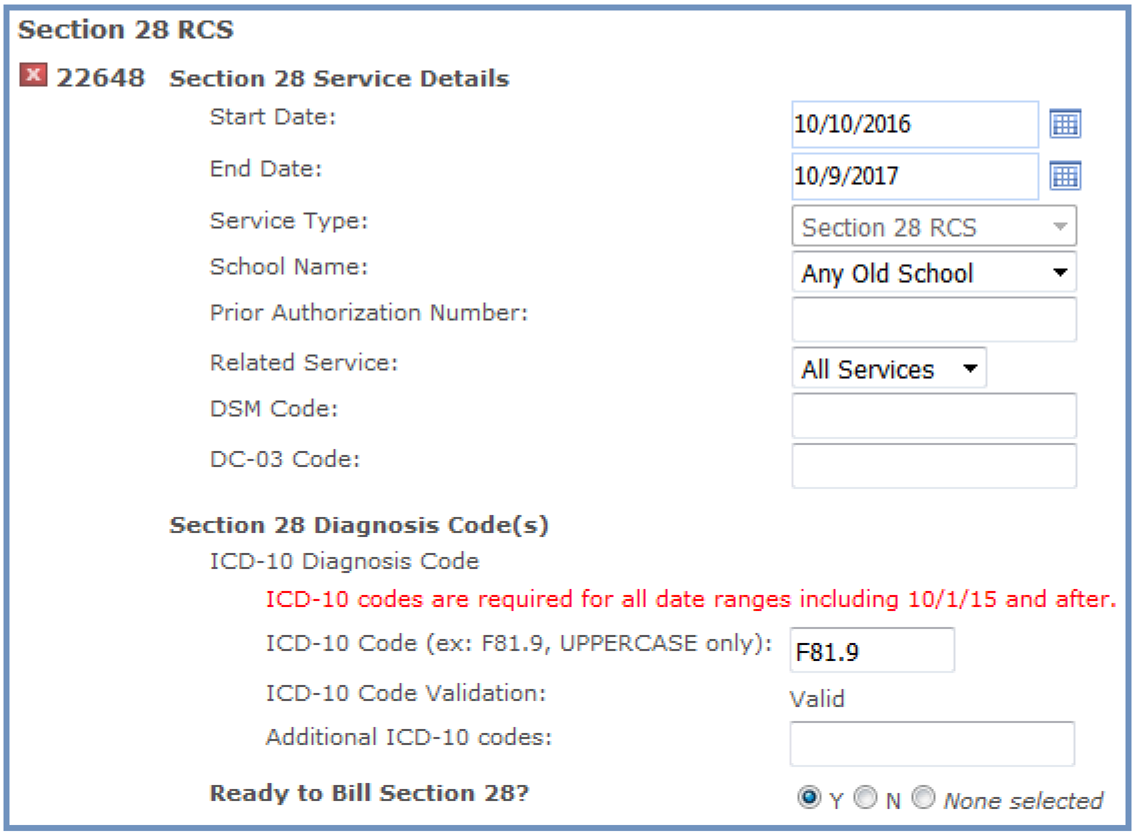
6) Select 

Section 28 RCS

If billing for Section 28, update the following under Section 28 RCS:

1) Start Date and End Date (must fall within Prior Authorization start and end date)
2) School Name
3) Prior Authorization — including KEPRO prefix
4) Related Service
5) Diagnosis Code (ICD-10)
6) Ready to bill for Section 28 (*None selected* or *Yes* indicates billing is allowed)

NOTE: If you provide the needed information to your Claims Analyst, they will be happy to input this information on your behalf. Please contact your Claims Analyst for assistance.


Section 28 RCS

22648 Section 28 Service Details

Start Date:	10/10/2016
End Date:	10/9/2017
Service Type:	Section 28 RCS
School Name:	Any Old School
Prior Authorization Number:	
Related Service:	All Services
DSM Code:	
DC-03 Code:	

Section 28 Diagnosis Code(s)

ICD-10 Diagnosis Code

ICD-10 codes are required for all date ranges including 10/1/15 and after.

ICD-10 Code (ex: F81.9, UPPERCASE only):	F81.9
ICD-10 Code Validation:	Valid
Additional ICD-10 codes:	
Ready to Bill Section 28?	Y N *None selected*

7) Select 

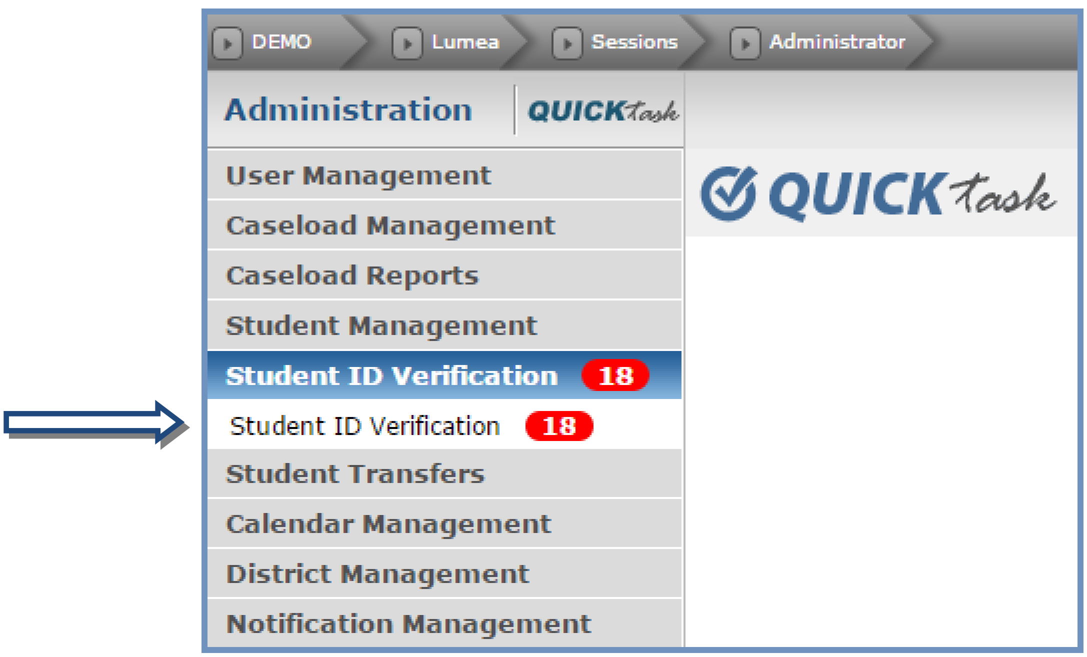
Student Identity Verification

When Service Providers have permission to add students, the potential exists for students to be added multiple times by different providers. Students added to Lumea by Service Providers always have a “Pending” status. A district Administrator can merge “Pending” student records into an existing “Active” record for the same student or make the “Pending” student “Active” using the process outlined below. Administrators should review the Student ID Verification window regularly to update “Pending” students to “Active” or to match a “Pending” student with an existing “Active” record for the same student. If pending students are present, the Student ID Verification menu will display a red number badge indicating the number of pending students for review, as shown below.

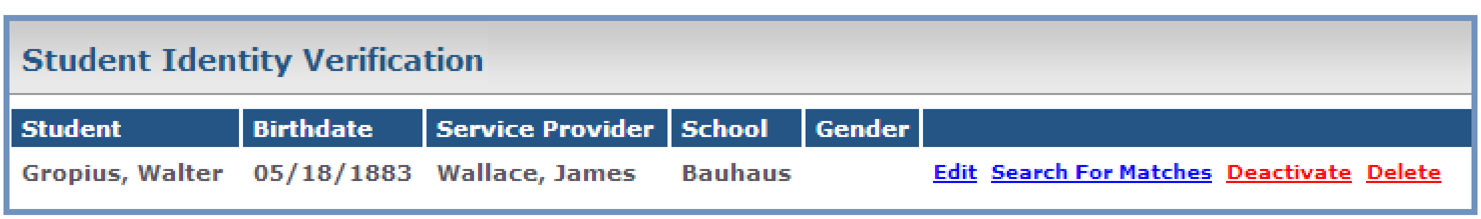
NOTES

- Any student with a status of “Pending” will not be processed for Medicaid reimbursement
- Select the “Delete” button only if you wish to delete all traces of a student from the database. Once a student is deleted all information associated with that particular student will be deleted as well. Only students who have no Medicaid billing will show the Delete option.
- Searching for matches to pending students will help to ensure that there are no duplications in student information.

1) Select Student Identity Verification from the Administration menu

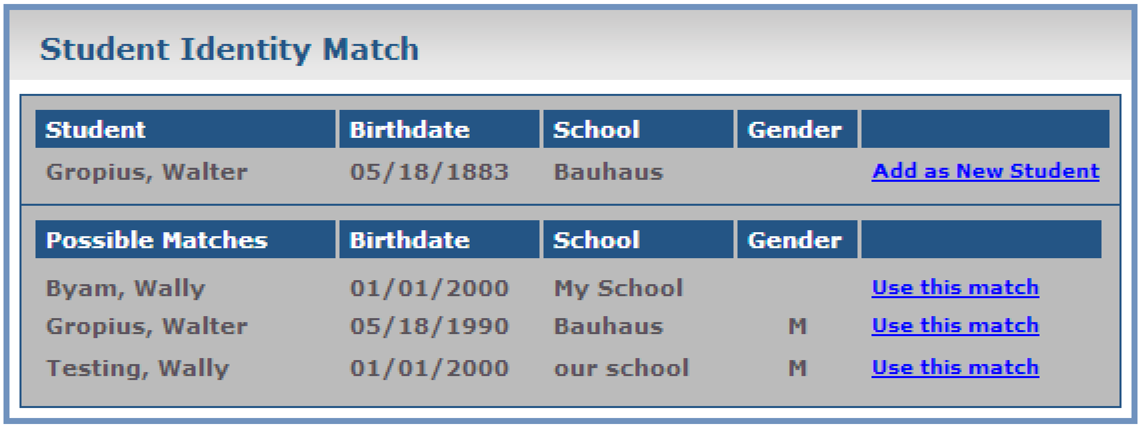


2) Select “Search for Matches” to the right of the appropriate student to determine if an active record already exists for the student.


Student Identity Verification

Student	Birthdate	Service Provider	School	Gender	
Gropius, Walter	05/18/1883	Wallace, James	Bauhaus		Edit Search For Matches Deactivate Delete

3) If an appropriate match is found, select “Use this Match.” If no appropriate matches are found, select “Add as New Student.” Both options will change the student status from “Pending” to “Active.” When selecting a match, the pending student’s session records will be merged into the active record.


Student Identity Match

Student	Birthdate	School	Gender	
Gropius, Walter	05/18/1883	Bauhaus		Add as New Student

Possible Matches	Birthdate	School	Gender	
Byam, Wally	01/01/2000	My School		Use this match
Gropius, Walter	05/18/1990	Bauhaus	M	Use this match
Testing, Wally	01/01/2000	our school	M	Use this match

NOTE: The Deactivate option will change the pending student’s status to Inactive. The Delete option will be available as long as the student does not have submitted or posted sesssions in Lumea.

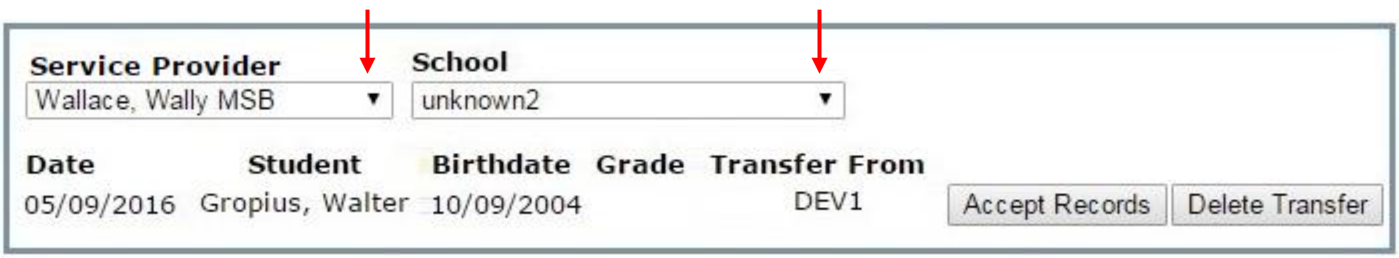
Student Transfers

The **Student Transfers** folder of the ***Administrative Menu*** allows Admins to manage electronic transfer of students between Lumea districts.

Incoming Transfers

1) In the Administration menu, select Student Transfers>Incoming Transfers

2) In the Workspace, associate the student with the Service Provider and School from the drop-down lists



3) Click 

 to accept the transfer or click 

 to refuse the transfer

Outgoing Transfers

The Outgoing Transfers window displays a list of students who have been exited with an exit reason of “Moved, Known to be continuing” along with the selection of a transfer district that also uses Lumea. The student’s records will be transferred electronically to the receiving district upon acceptance of the transfer records by that district.

1) To review if the transfer completed, go to the Administration menu, select Student Management>Outgoing Transfers

2) The transfer will remain in the Pending Status until the receiving district accepts the record. Once accepted, the record will show a completed status finalizing the transfer as show in an example below. Using the Delete Transfer option removes the transfer from the respective Outgoing and Incoming transfer windows in both districts.

Outgoing Student Transfers

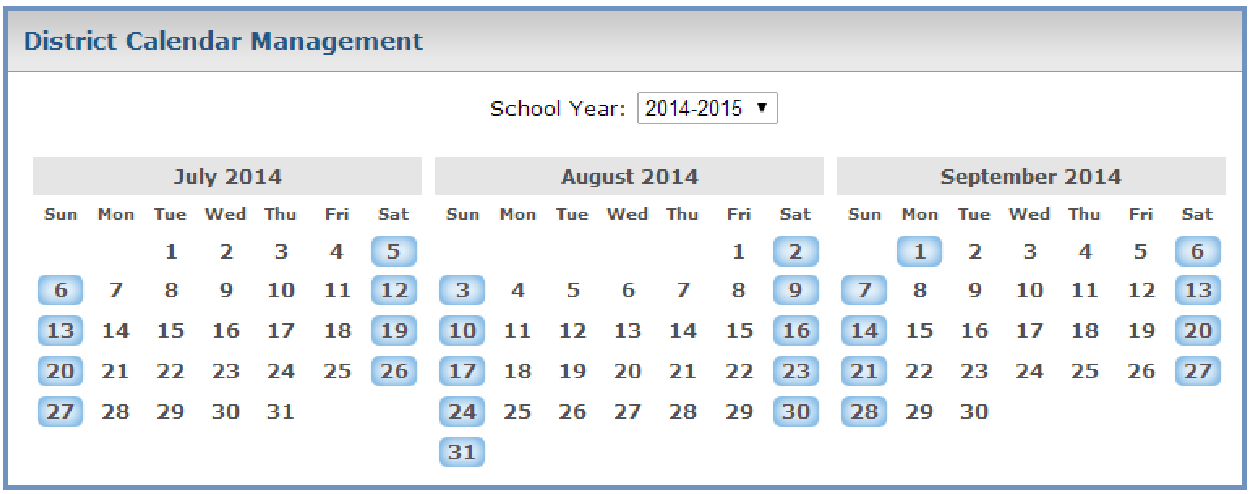
Date	Student	Birthdate	Grade	Transfer To	Status	
05/12/2016	Gropius, Walter	05/18/1883		DEV1	Pending	Delete Transfer
05/12/2016	Gropius, Walter	05/18/1883		DEV1	Complete	Delete Transfer

District – No School Days

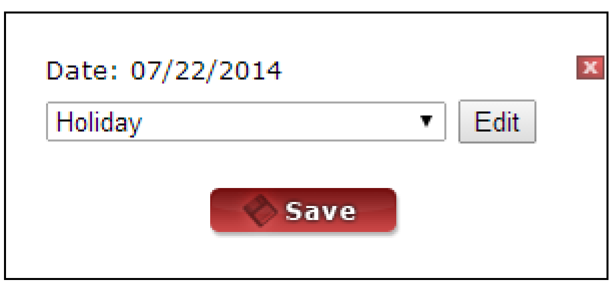
NOTES:

- Only mark full days off as non-school days. Leave half-days marked as a "School Day" so the valid sessions on that day can be billed.
- All District Non-School days are automatically copied to each school's calendar. Differences in specific school schedules can be accommodated using the instructions on the following page.

1) In the Administration Menu, select Calendar Management
2) Select District – No School Days
3) Select the School Year from the drop-down list
4) Select a non-school day by clicking on the date



5) Once a date has been selected, indicate the reason for no school on that day



6) Select 

School – No School Days

NOTES:

- Only mark full days off as non-school days. Leave half-days marked as a “School Day” so the valid sessions on that day can be billed.
- All District Non-School days are automatically copied to each school’s calendar. Use the instruction below to set non-school days for specific schools that are in addition to district-wide non-school days.
- If a day is marked on the district wide non-school days calendar, then those dates cannot be adjusted on the non- school days’ school calendar.

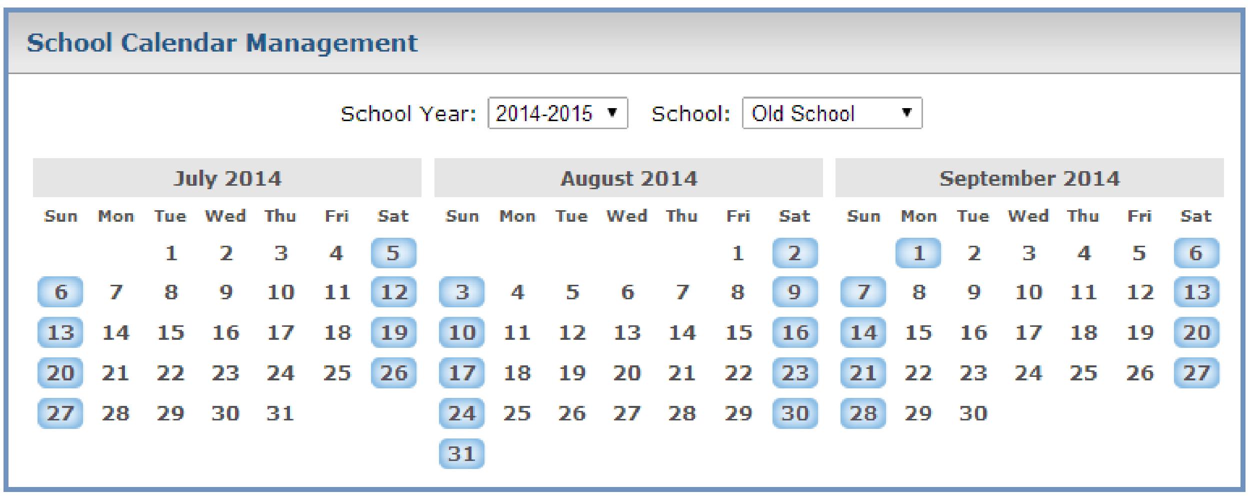
1) In the Administration Menu, select Calendar Management

2) Select School – No School Days

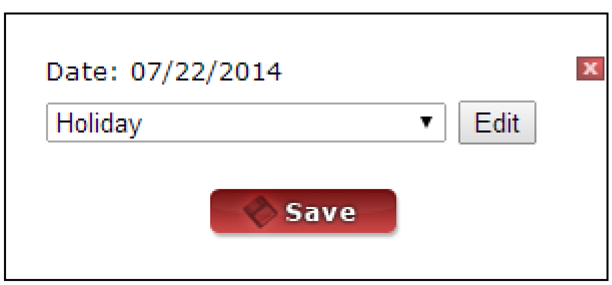
3) Select the School Year from the drop-down list

4) Select the School from the drop-down list

5) Select a non-school day by clicking on the date



6) Once a date has been selected, indicate the reason for no school on that day



7) Select 

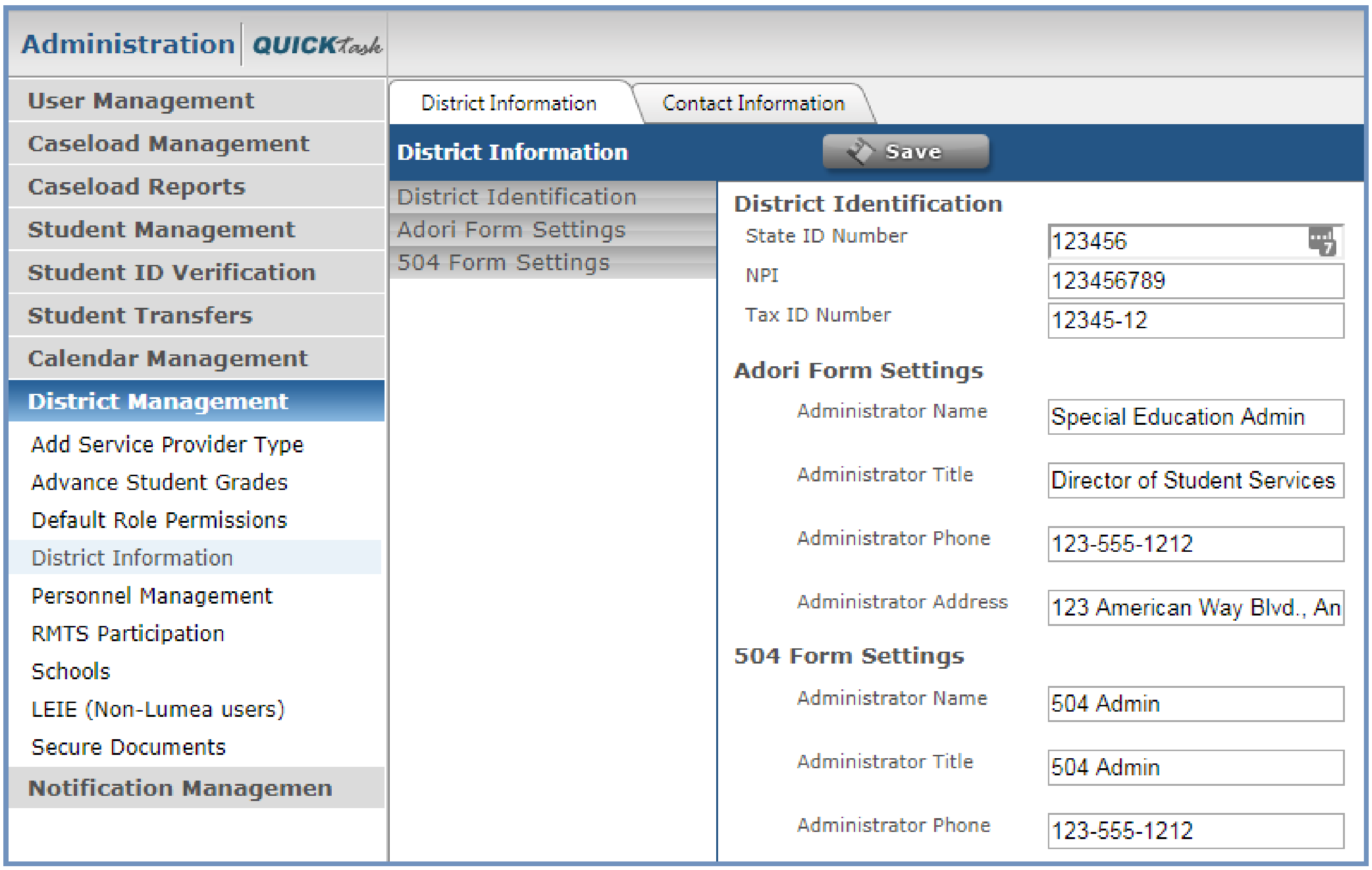
District Information

The District Information section of the District Management menu allows Administrators to input relevant District ID information, administrator information that populates on some Special Education and 504 forms, as well as contact information for key district personnel.

District Information Tab

In the District Information tab of the District Information window, there are three sections:

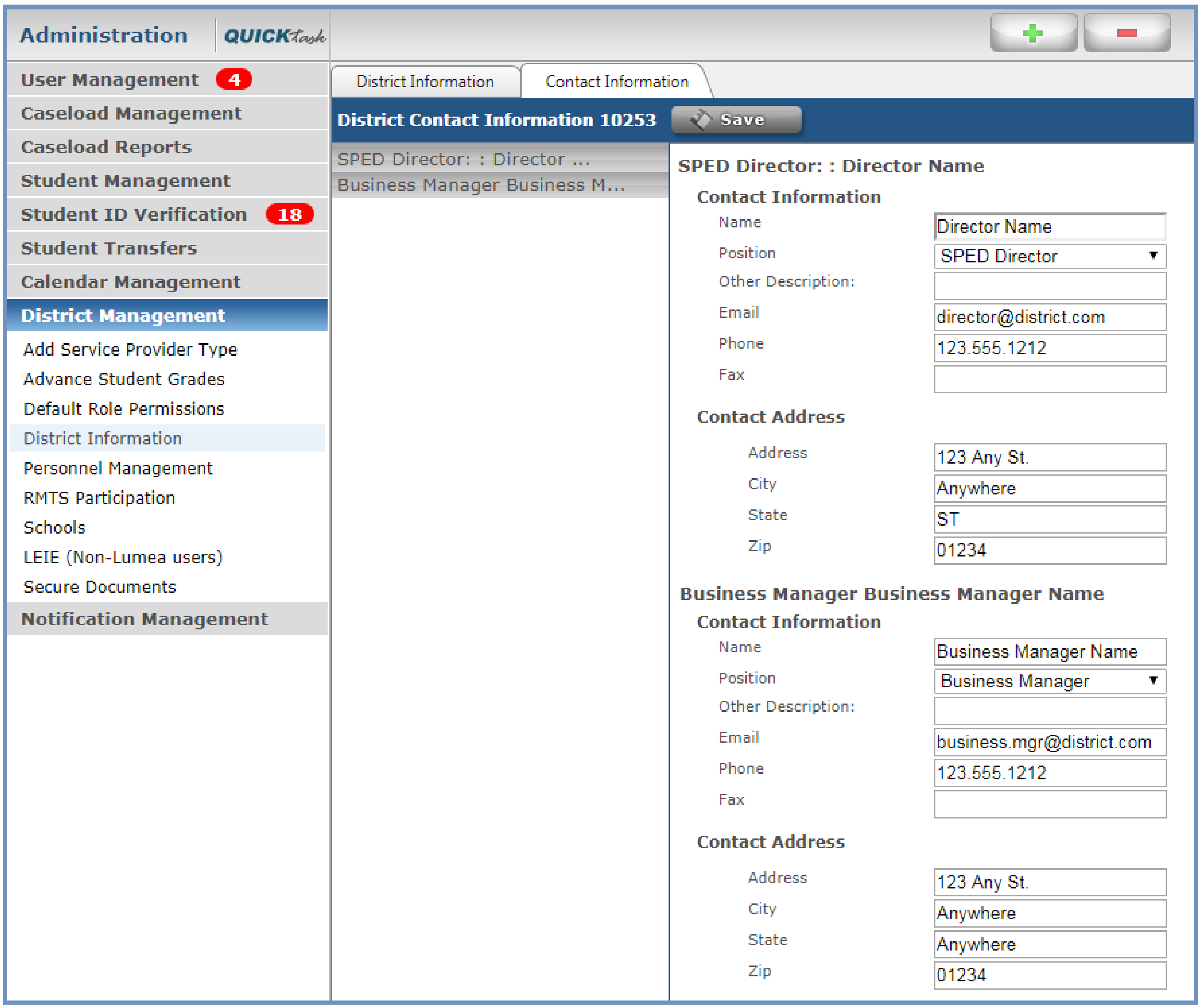
- District Identification – District ID numbers relevant to Medicaid billing
- Adori Form Settings – information for the district contact who should display on some Special Education forms in Adori™ (if applicable)
- 504 Form Settings – information for the district contact who should display on some 504 forms in Acuity™ 504 (if applicable)



Contact Information Tab

The Contact Information tab is the place to keep EDMS informed of new or updated information for key district personnel.

- New contacts may be added by using the  icon
- Existing contacts may be updated directly in the Contact Information tab
- Existing contacts may be deleted using the  icon
- EDMS will be automatically notified of additions or updates so there is no need to contact us about changes

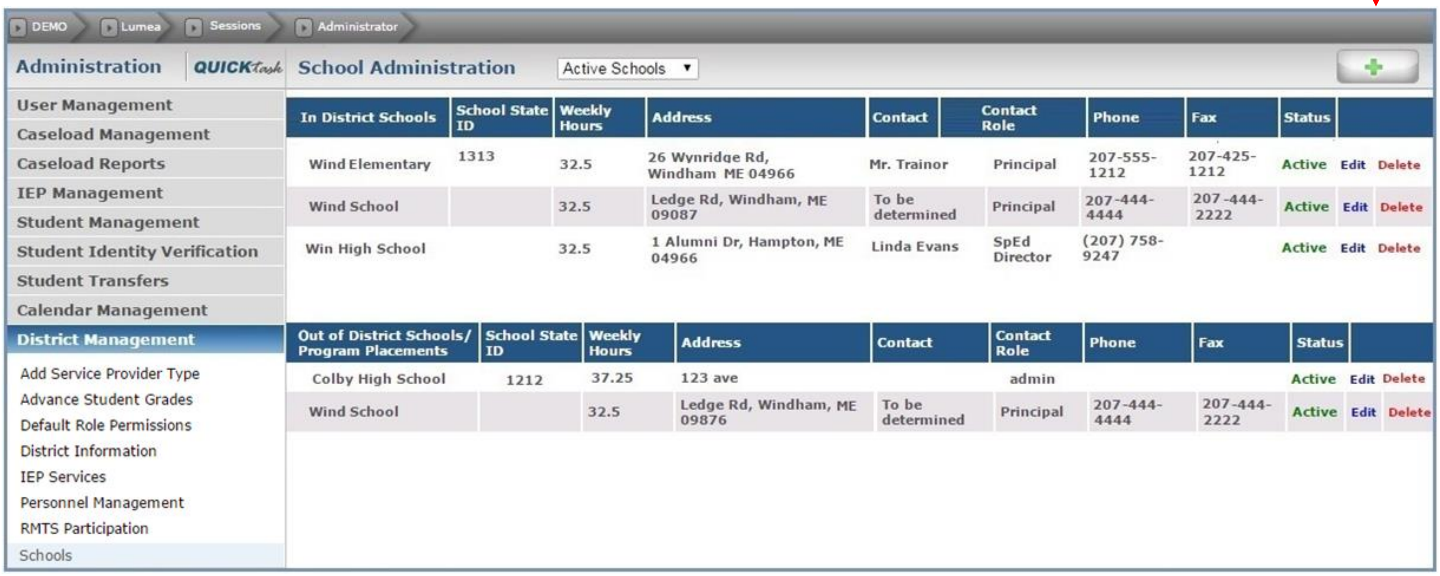


Schools Window

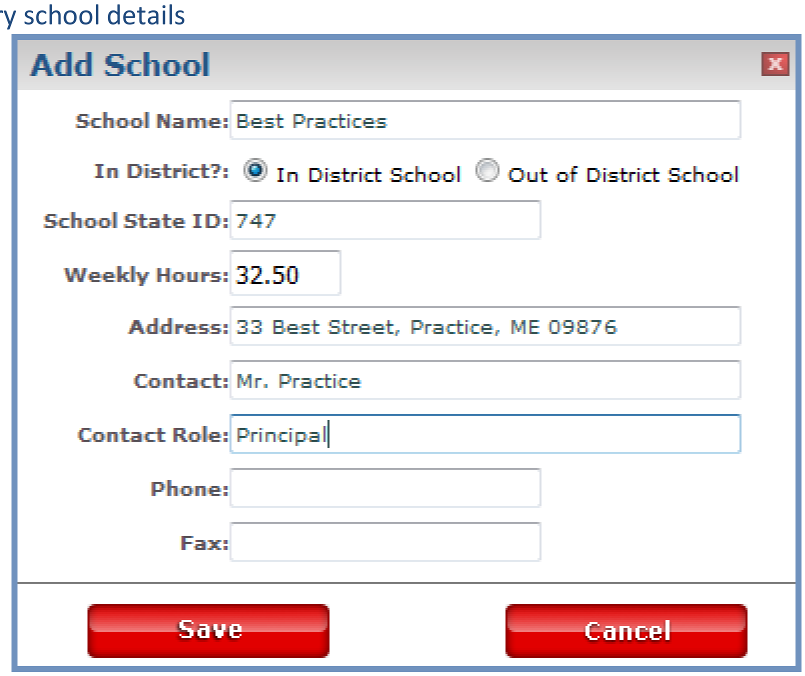
Note: When adding or editing School information, please inform your Claims Analyst in case the changes or additions affect billing.

Add a New School

1) In the Administration menu, select District Management>Schools
2) Select the  icon to create a new school record



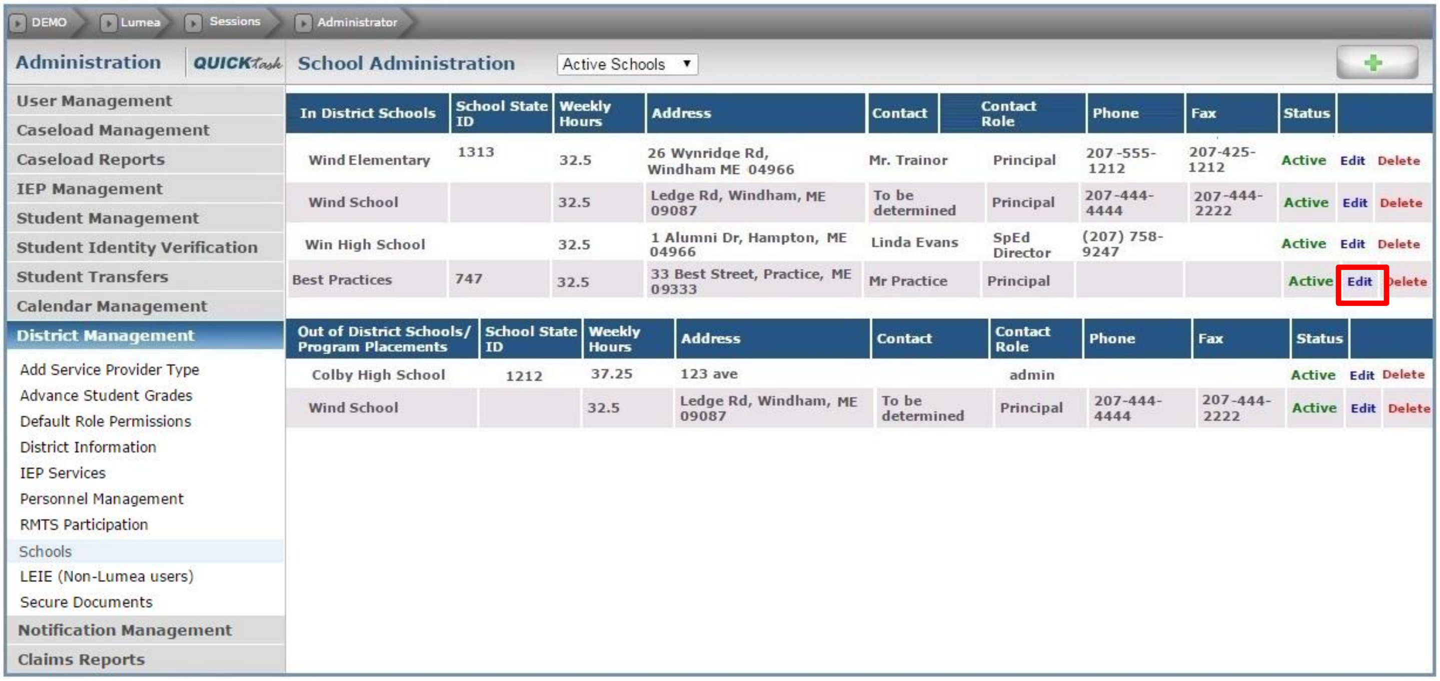
3) Enter the necessary school details



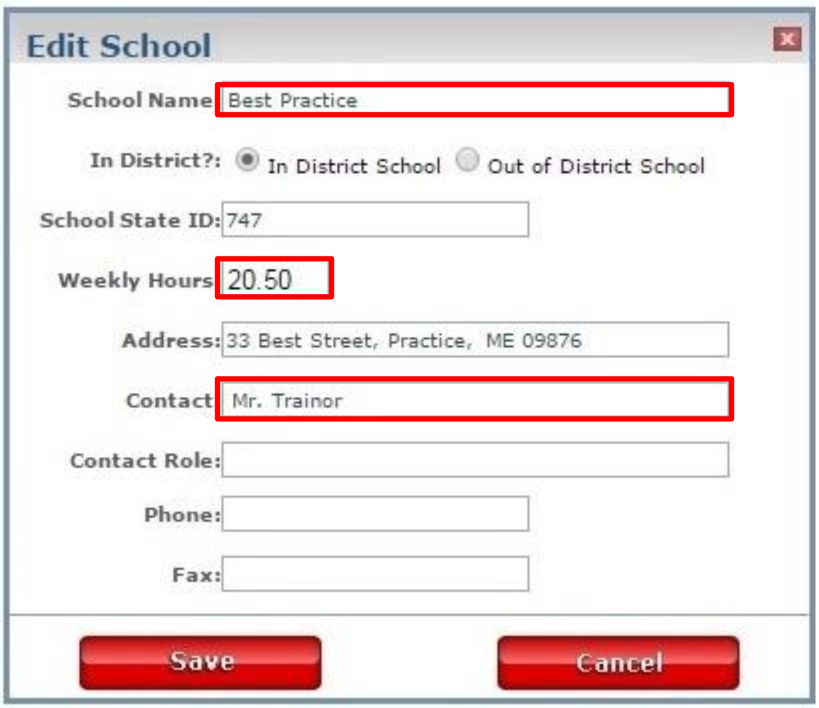
4) Select 

Update School Information

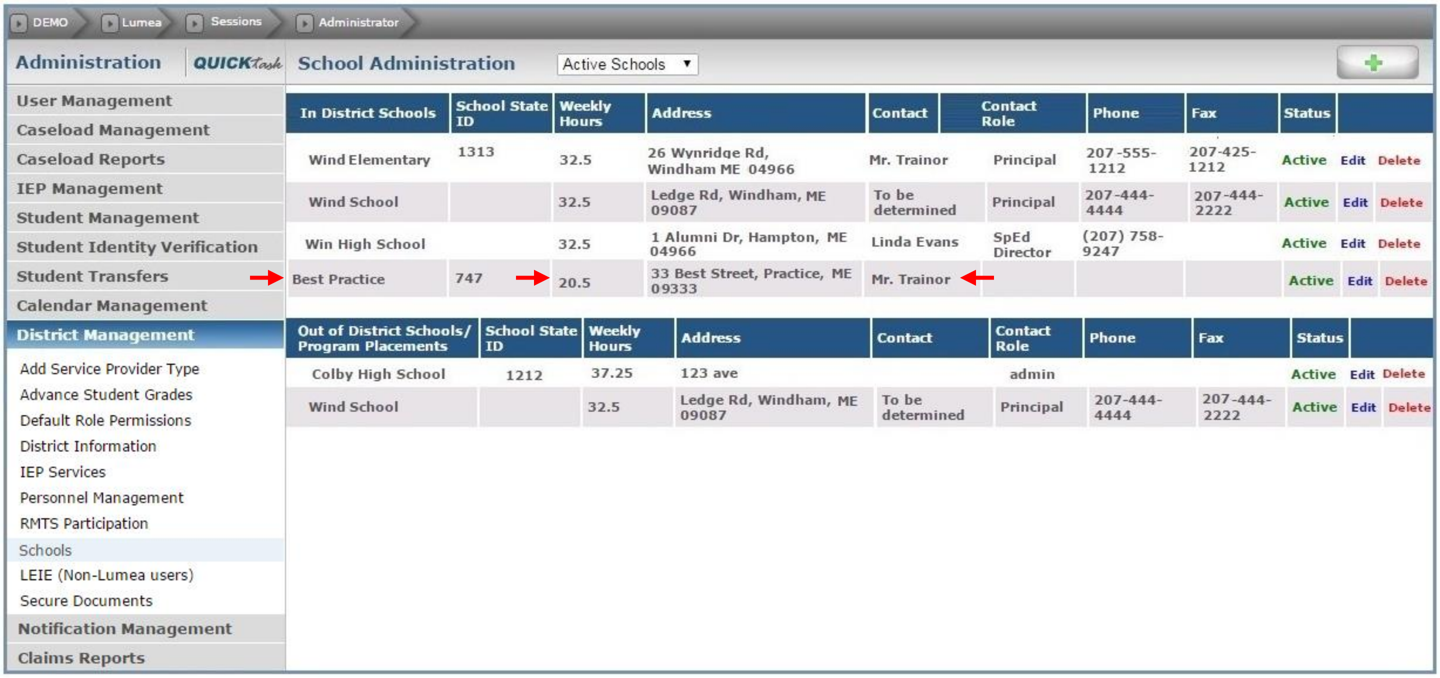
1) To edit a school's information click on the **Edit** link and update the necessary school details



Update the necessary school information in the edit school window



2) Select 


DEMO
Lumea
Sessions
Administrator
Administration
QUICKtask
School Administration
Active Schools
User Management
Caseload Management
Caseload Reports
IEP Management
Student Management
Student Identity Verification
Student Transfers
Calendar Management
District Management
Add Service Provider Type
Advance Student Grades
Default Role Permissions
District Information
IEP Services
Personnel Management
RMTS Participation
Schools
LEIE (Non-Lumea users)
Secure Documents
Notification Management
Claims Reports
In District Schools | School State ID | Weekly Hours | Address | Contact | Contact Role | Phone | Fax | Status
Wind Elementary | 1313 | 32.5 | 26 Wynridge Rd, Windham ME 04966 | Mr. Trainor | Principal | 207-555-1212 | 207-425-1212 | Active | Edit | Delete
Wind School | 32.5 | Ledge Rd, Windham, ME 09087 | To be determined | Principal | 207-444-4444 | 207-444-2222 | Active | Edit | Delete
Win High School | 32.5 | 1 Alumni Dr, Hampton, ME 04966 | Linda Evans | SpEd Director | (207) 758-9247 | Active | Edit | Delete
Best Practice | 747 | 20.5 | 33 Best Street, Practice, ME 09333 | Mr. Trainor | Active | Edit | Delete
Out of District Schools/ Program Placements | School State ID | Weekly Hours | Address | Contact | Contact Role | Phone | Fax | Status
Colby High School | 1212 | 37.25 | 123 ave | admin | Active | Edit | Delete
Wind School | 32.5 | Ledge Rd, Windham, ME 09087 | To be determined | Principal | 207-444-4444 | 207-444-2222 | Active | Edit | Delete

LEIE (List of Excluded Individuals and Entities)

Lumea allows districts to input the names of those individuals who may not be Lumea users, but are directly involved with the Medicaid billing process, for our monthly check against the Office of Inspector General's List of Excluded Individuals and Entities (LEIE) or the federal government's Excluded Parties List System (EPLS).

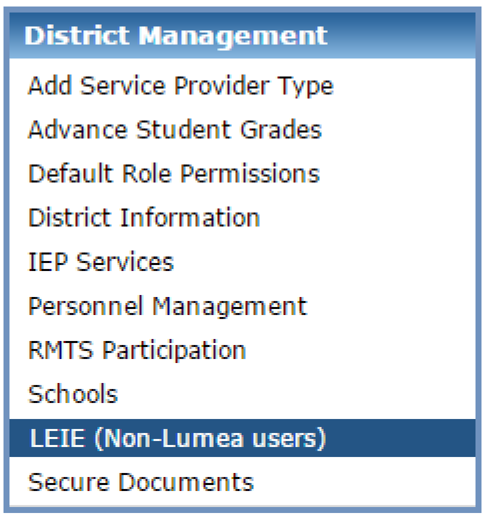
Under District Management in Lumea, Administrators will now see a workspace titled "LEIE (Non-Lumea Users)." In this workspace, Administrators may enter the first name, last name, and date of birth for any individuals involved in the Medicaid billing process that are not already users in Lumea. Examples could include referring licensed practitioners of the healing arts, clinicians developing ITPs, evaluators, and managing employees (special education director, building coordinator, business manager, superintendent). Any potential matches will be part of the report sent to you monthly by your Claims Analyst.

It is very important that schools consider participating in this process by inputting all individuals, on an ongoing basis, who are involved in the Medicaid billing process at any level as described above. School districts are subject to substantial fines if an excluded individual is utilized in the Medicaid billing process.

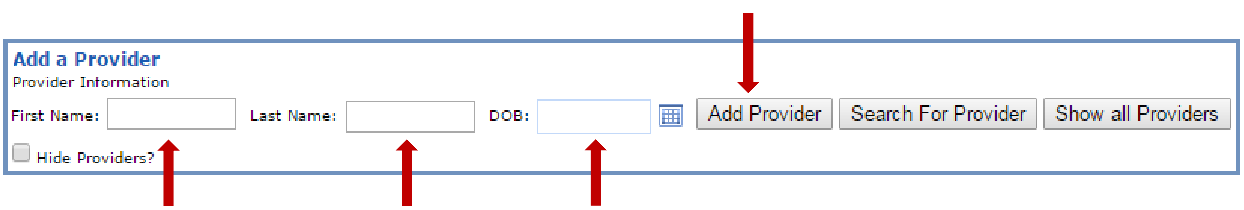
Please contact your Program Specialist with any questions.

Add a Non-Lumea Provider

1) To add a provider to the list of individuals to check against the LEIE, select District Management>LEIE (Non-Lumea users)



2) Enter the First Name, Last Name, and DOB, then click on Add Provider



Edit a Provider

1) Select the edit button to make changes to a provider's information

		First Name	Last Name	DOB
Edit	Delete	John	Smith	12/1/1972
Edit	Delete	Davey	Wavey	4/18/1981
Edit	Delete	Nina	Pinta	8/14/1960

2) Confirm the changes by selecting update

		First Name	Last Name	DOB
Update	Cancel	John	Smith	8/1/1975

Delete a Provider

1) Select the delete button to make remove a provider's information

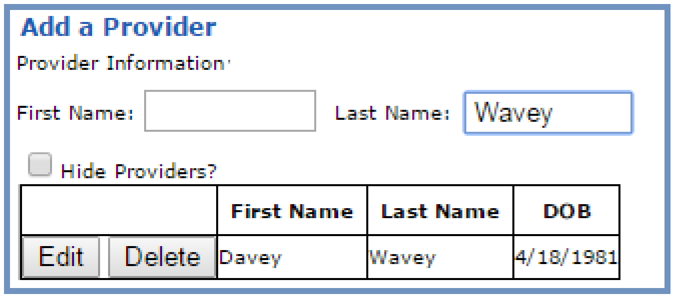
		First Name	Last Name	DOB
Edit	Delete	John	Smith	12/1/1972
Edit	Delete	Davey	Wavey	4/18/1981
Edit	Delete	Nina	Pinta	8/14/1960

Search for a Provider

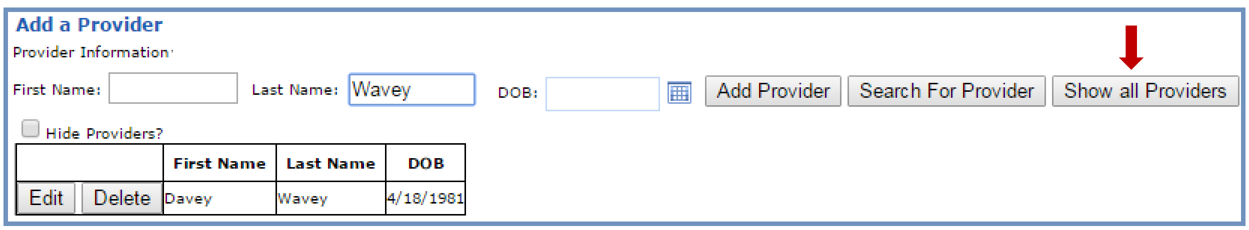
The Search for Provider button allows you to search the existing list of entered providers

1) Enter data in any or all of the available fields and click on Search for Provider

2) The search results will display

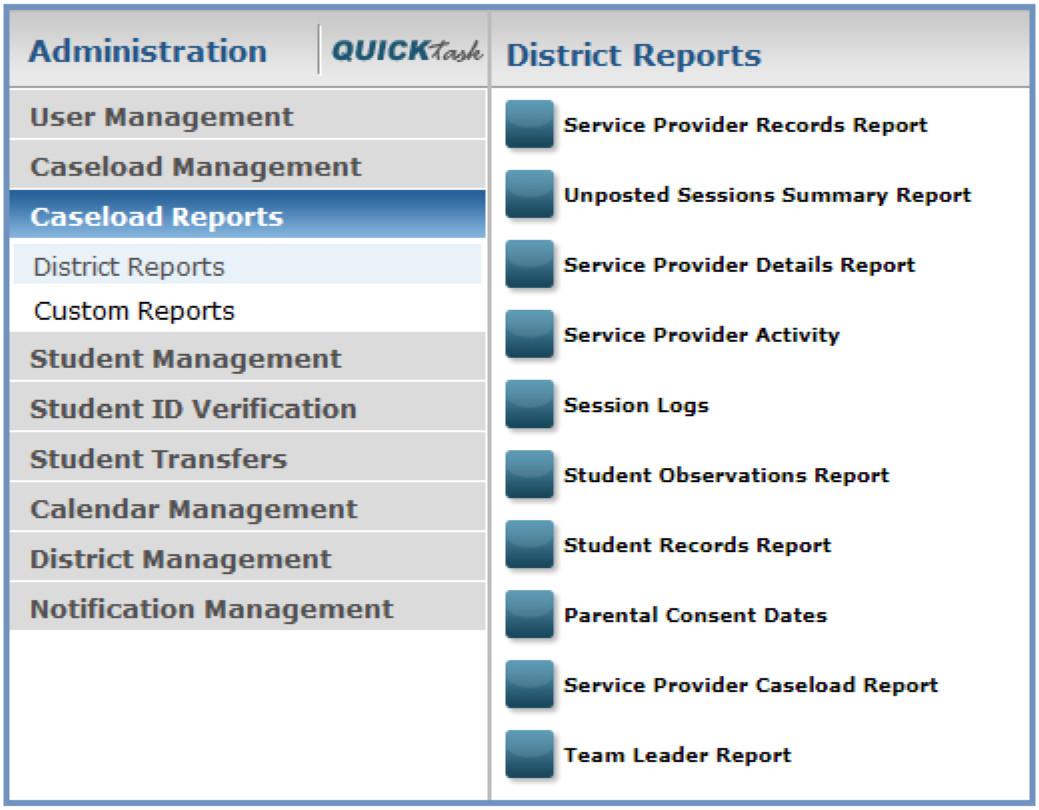


3) To return to the full list of providers, select Show All Providers



District Reports

Administrators have the ability to run several reports in Lumea. These reports enable Administrators to review utilization. Administrators can access these reports by selecting the Caseload Reports section of the Administrative Column – District Reports task.

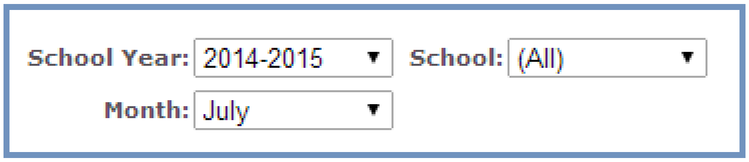


An overview of several key reports is provided on the following pages.

Service Provider Records Report

This report allows Administrators to review utilization of Lumea by their providers in regard to scheduling, submitting and posting sessions.

1) Select **Service Provider Records Report**
2) Select the School Year, Month, and School filters for the report



3) Select **Generate Report**
4) Review Results

Format: Posted/Unposted/Submitted

All sessions posted | Some sessions posted | Some sessions submitted
No sessions posted | No sessions scheduled | Future scheduled sessions

Service Provider	Service Provider Type	9/01/2010	9/02/2010	9/03/2010	9/04/2010
Martin, Deborah	Speech Language Pathologist	0/0/1	0/0/1		0/0/1
Littlefield, Chris	Occupational Therapist	1/1/0		1/1/0	0/1/0
Nix, Rebecca	Speech Language Pathologist	0/1/0	1/1/0		0/1/0
Perkins, Mary	Physical Therapist	1/1/0	1/0/0	0/1/0	1/0/0

- A green cell indicates all sessions have been posted for that Service Provider on that day
- A yellow cell indicates some sessions have yet to be posted by that Service Provider on that day
- A red cell indicates no sessions have been posted by that Service Provider on that day
- A blue cell indicates some session have been submitted by a provider who requires professional oversight
- A light gray cell indicates a future scheduled session
- A dark gray cell indicates a non-school day
- The numbers in the cells are displayed in a “Posted/Unposted/Submitted” format. (i.e. “3/2/0” indicates a total of five sessions with three being posted, two unposted and none submitted)
- Blank cells indicate no sessions scheduled on that day

OPTIONAL: Select **Export to Excel** to export the report to Excel for further manipulation and/or printing.

Unposted Sessions Summary Report

This report shows all service providers with sessions that have not been posted, thus unavailable for billing. The Oldest Session field allows you to focus on sessions that are approaching the claim filing time limit (365 days).

1) Select **Unposted Sessions Summary Report**

2) Select School Year, Month, and School fields from drop-down menus

3) Select **Generate Report**

Unposted Sessions Summary Report — Select New Report

Start Date: 7/15/2016 End Date: 7/14/2017 School: (All) — Generate Report — Export to Excel

Service Provider	Requires Oversight	Unsubmitted Sessions	Unposted Sessions	Oldest Session	Provider's Team Leaders	
Black, John	Y	13	0	07/18/2016	Wall, Martin	View Details
Carr, Ryder	N	0	19	06/05/2017		View Details
Foster, Rebecca	N	0	46	07/20/2016		View Details
Wallace, Wally	Y	3	0	08/01/2016	Torio, Kim	View Details

4) Select View Details to display additional details for a specific provider

Unposted Sessions Report for Wally Wallace — Select New Report

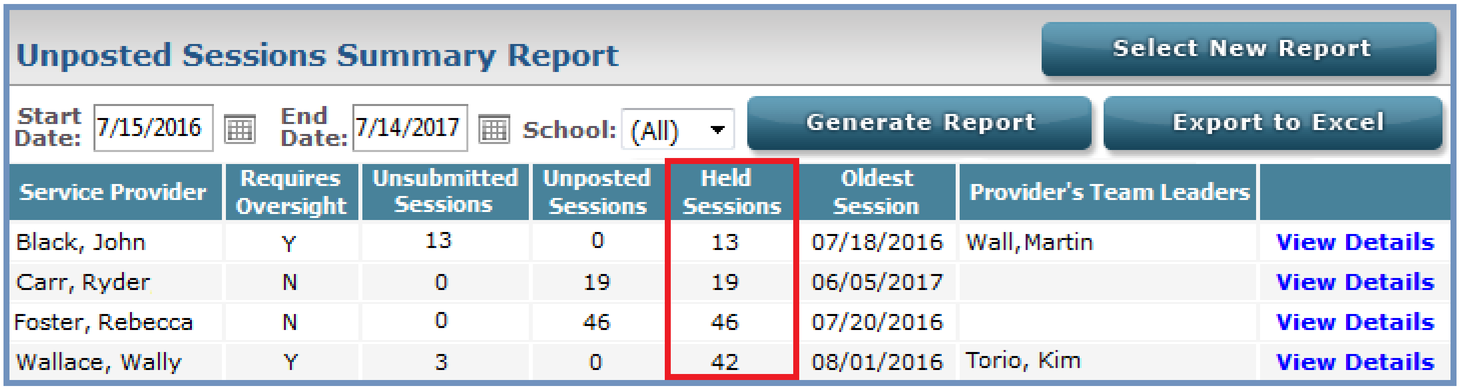
Return to Summary — Export to Excel

Session Date	Service Type	Start Time	End Time	Description	Students
08/01/2016	Occupational Therapy	8:00 AM	8:30 AM	Occupational Therapy	Gropius, Walter
12/12/2016	Physical Therapy	8:00 AM	8:30 AM	Physical Therapy	Gropius, Walter
02/06/2017	Occupational Therapy	8:00 AM	8:30 AM	Occupational Therapy	Gropius, Walter

5) Select **Return to Summary** to go back to the overall report

OPTIONAL: Select **Export to Excel** in either the Summary window or the Detail window to export the results to Excel

Note: If your district has chosen to lock session posting for sessions with incomplete goals, an additional column, called Held Sessions, will display in the Unposted Sessions Summary Report. The Held Sessions column indicates the number of sessions that are unable to be posted by the Service Provider for reasons such as goals in the session not being marked as complete or goals in the session being linked to an IEP that is not Activated/Printed (for accounts that also use Adori™)


Unposted Sessions Summary Report

Select New Report

Start Date: 7/15/2016 End Date: 7/14/2017 School: (All) Generate Report Export to Excel

Service Provider	Requires Oversight	Unsubmitted Sessions	Unposted Sessions	Held Sessions	Oldest Session	Provider's Team Leaders	
Black, John	Y	13	0	13	07/18/2016	Wall, Martin	View Details
Carr, Ryder	N	0	19	19	06/05/2017		View Details
Foster, Rebecca	N	0	46	46	07/20/2016		View Details
Wallace, Wally	Y	3	0	42	08/01/2016	Torio, Kim	View Details

Service Provider Details Report

This report allows Administrators to review all users' details such as credentials, current caseload count, etc.

1) Select **Service Provider Details Report**

2) The results will display automatically

Service Provider	DOB	Provider Type	Contracted	Contracted Agency	Credential	Expires	Assigned Team Leader(s)	Current Caseload	Average Session Hours Per Week
Benjamin, Rebecca	11/25/1979	BHP - Section 65	Yes	Test	Certified BHP	11/30/2016	Benjamin, Tina	3	0
Benjamin, Rebecca	11/25/1979	Licensed Master Social Worker (LMSW)	Yes	Test		09/20/2019	Benjamin, Tina	3	0
Benjamin, Rebecca	11/25/1979	Occupational Therapist	Yes	Test	State Licensed OT	11/30/2016	Benjamin, Tina	3	0

Note: The Average Session Hours Per Week only applies to sessions that are part of a series.

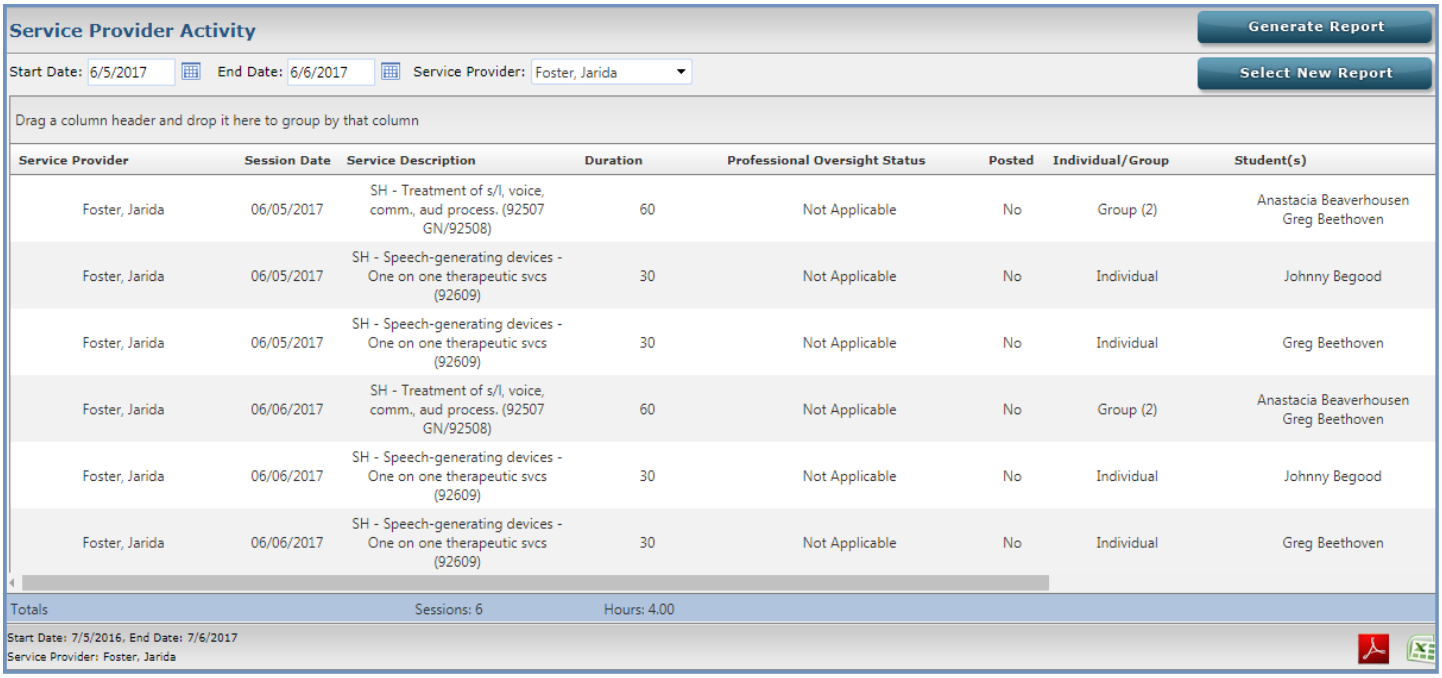
OPTIONAL: Select or in the lower right corner to export the report to PDF or Excel for printing.

Service Provider Activity

This report allows Administrators to review all sessions for one or all Service Providers for any date range.

1) Select **Service Provider Activity**

2) Review Results


Service Provider Activity — Generate Report — Select New Report

Start Date: 6/5/2017 End Date: 6/6/2017 Service Provider: Foster, Jarida

Drag a column header and drop it here to group by that column

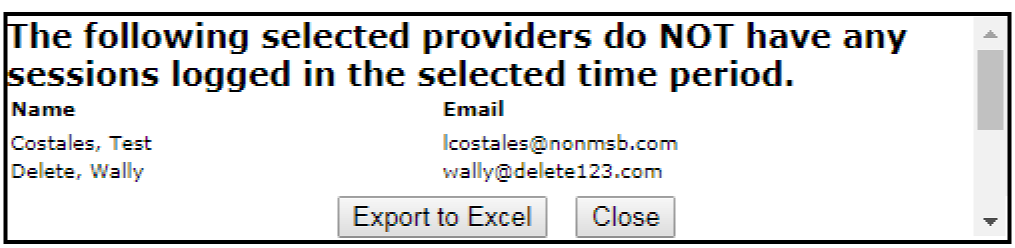
Service Provider	Session Date	Service Description	Duration	Professional Oversight Status	Posted	Individual/Group	Student(s)
Foster, Jarida	06/05/2017	SH - Treatment of s/l, voice, comm., aud process. (92507 GN/92508)	60	Not Applicable	No	Group (2)	Anastacia Beaverhousen Greg Beethoven
Foster, Jarida	06/05/2017	SH - Speech-generating devices - One on one therapeutic svcs (92609)	30	Not Applicable	No	Individual	Johnny Begood
Foster, Jarida	06/05/2017	SH - Speech-generating devices - One on one therapeutic svcs (92609)	30	Not Applicable	No	Individual	Greg Beethoven
Foster, Jarida	06/06/2017	SH - Treatment of s/l, voice, comm., aud process. (92507 GN/92508)	60	Not Applicable	No	Group (2)	Anastacia Beaverhousen Greg Beethoven
Foster, Jarida	06/06/2017	SH - Speech-generating devices - One on one therapeutic svcs (92609)	30	Not Applicable	No	Individual	Johnny Begood
Foster, Jarida	06/06/2017	SH - Speech-generating devices - One on one therapeutic svcs (92609)	30	Not Applicable	No	Individual	Greg Beethoven
Totals		Sessions: 6	Hours: 4.00				

Start Date: 7/5/2016, End Date: 7/6/2017
Service Provider: Foster, Jarida

If viewing the report for all Service Providers, the report is sorted and grouped by Service Provider name, by default.

Additional column headings may be dragged into the bar just above the column headings to sort by those options, as well.

Note: If a user does not have any sessions logged, the following pop up screen will appear with the option to export this information into a Microsoft Excel document for review.


The following selected providers do NOT have any sessions logged in the selected time period.

Name	Email
Costales, Test	lcostales@nonmsb.com
Delete, Wally	wally@delete123.com

Export to Excel   Close

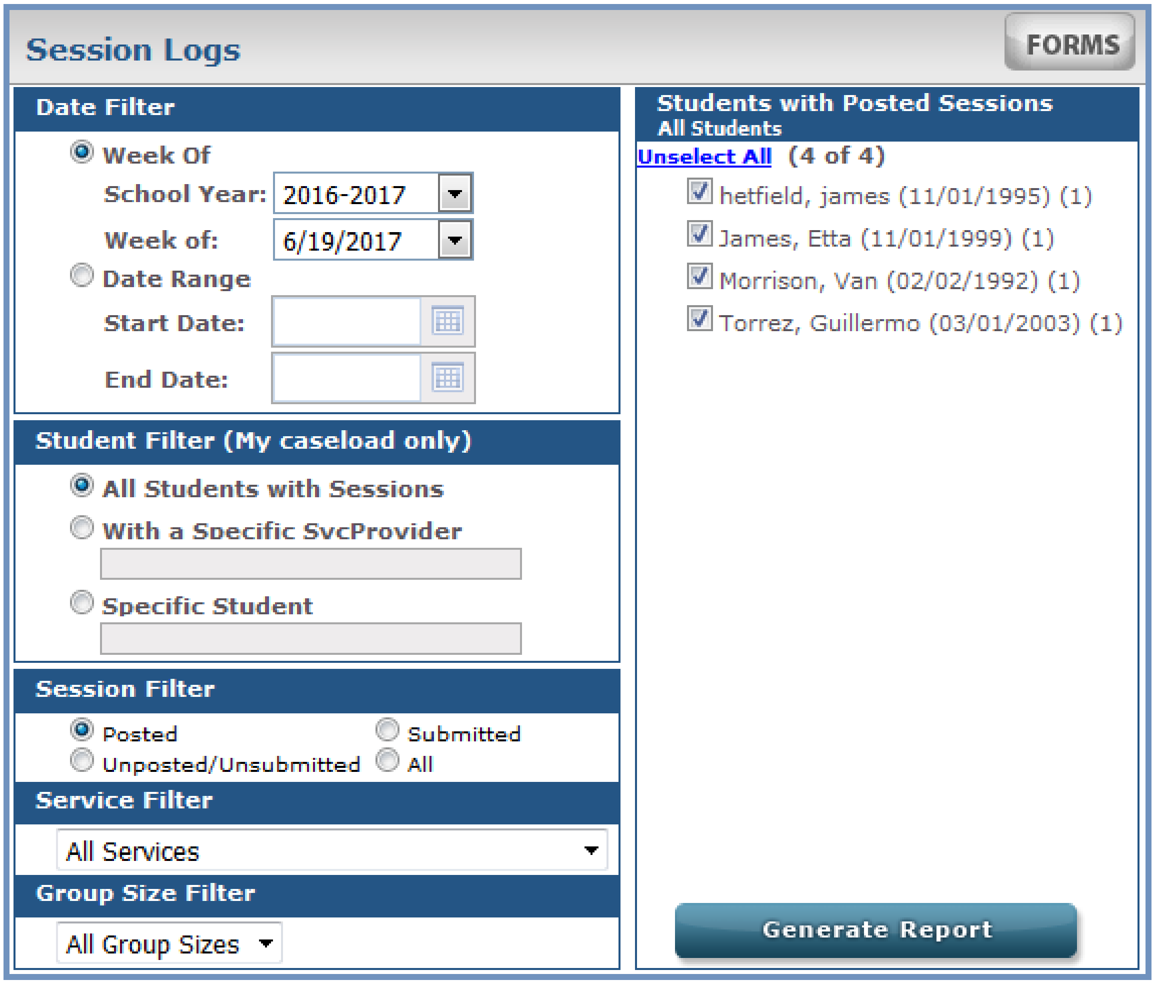
OPTIONAL: Select or in the lower right corner to export the report to PDF or Excel for printing.

Session Logs

This report allows Administrators to review all sessions created by providers as well as the ability to print any logs.

1) Select **Session Logs**

2) Select appropriate filters on the left, then select the students for the report on the right



3) Select **Generate Report**

Service Provider	Student	Status	Date	Service Type	Session Type	Group Size	Scheduled Duration	Net Duration	Start	End	Signed By	Signed Date	Activities	Goals/Objectives with Observations
Foster, Jarida	Beethoven, Greg	Posted	06/05/2017	SH - Speech-generating devices therapeutic svcs (92609)	Individual	1	30	30	7:00 AM	7:30 AM	DEC	07/12/2017 09:30:17 AM	Activity 1	1
Foster, Jarida	Beethoven, Greg	Posted	06/06/2017	SH - Speech-generating devices therapeutic svcs (92609)	Individual	1	30	30	7:00 AM	7:30 AM	DEC	07/12/2017 09:30:39 AM	Activity 2	1
Foster, Jarida	Beethoven, Greg	Posted	06/07/2017	SH - Speech-generating devices therapeutic svcs (92609)	Individual	1	30	30	7:00 AM	7:30 AM	DEC	07/12/2017 09:31:16 AM	Activity 1	1

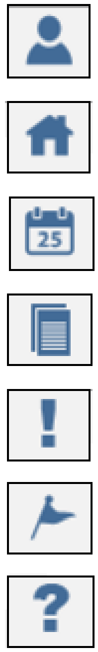
4) Select **FORMS** to print Session Log forms or select **Export to Excel** to export report to Excel

Additional Tools

1. Action Icons and Navigation Buttons:

Navigation Buttons:

- My Profile
- Home Screen
- Session Calendar
- Blank Forms
- Notifications
- Reminders
- Help Menu



Work Space Action Icons:

- Add Information
- Delete Information
- View/Print Forms
- Personal Calendar View
- School Calendar View

2. Pop-up Blockers:

Lumea utilizes a variety of pop-up windows to display information. To disable pop-up blockers, follow the steps below for your specific browser:

Google Chrome

- Click the Chrome Menu icon (three vertical dots in the upper right corner)
- Select Settings
- Scroll down and click on the “Advanced” link at the bottom of the screen
- Scroll down and click the " Content Settings" section under the Privacy and Security heading
- Select the “Pop-ups” section
- Under the “Allow” section, click on “Add” at the right
- Type login.eddatasolutions.com in the box
- Click “Add” to finish
- Close all browser windows before trying again

Internet Explorer

- Click on Tools at the top of your browser screen or the gear icon on the upper right side of your browser screen
- From the list select Internet Options
- Choose the privacy tab
- Under the pop up blocker heading leave the “Turn on Pop-up Blocker” box checked and select Settings
- In "Address of the website to allow: enter login.eddatasolutions.com
- Click on the Add button
- Click Close, then “OK” on the screen

Microsoft Edge
- Open Edge
- Click the More button in the top right (the one with the three dots)
- Click Settings
- Scroll down and click "View Advanced Settings"
- Click the slider under the heading that says "Block pop-ups"

Firefox
- Click on Firefox Menu (square box in the upper right corner with three horizontal lines)
- Select Options from the menu
- In the Options window, select Content from the left menu bar
- In the Pop-ups section, click on the exceptions button
- In the field for "Address of the website:" enter login.eddatasolutions.com
- Click on the add button

Safari on a Mac
- Click on the Safari menu in the upper left corner of your screen
- Select preferences
- Select the security tab and make sure the "block pop-up windows" option is not checked under web content

Safari on an iPad
- Open the "Settings" menu on your Home screen
- Tap the "Safari" tab on the Settings page
- In the Safari preferences screen, scroll down the page to the "Security" section
- Slide the "Block Pop-Ups" switch to the "Off" position
- Press the "Home" button to return to your Home screen

3. Clearing Cache:

Google Chrome
- Click the Chrome Menu icon (three vertical dots in the upper right corner)
- Select Settings
- Scroll down and click on the “Advanced” link at the bottom of the screen
- Scroll down and click the “Clear Browsing Data” section under the Privacy and security heading
- After “Clear the following items from”, select “the beginning of time”
- Check the box for “Cached images and files”
- Click Clear Browsing Data. This should take a few seconds to minutes depending on amount of cached information
- Close all open browsers and log in again

Internet Explorer
- Click on Tools
- Select Internet Options
- Select the General tab
- In the Browsing History section click on Delete
- Check off temporary internet files, cookies and history
- Click Delete

Microsoft Edge
- Click the Hub icon
- Click the History icon
- Click the link labeled Clear all history
- Check the boxes for each item you want to clear
- Click the Clear button. The message "All Clear!"

Firefox

- Click on Tools
- Select Clear Recent History
- Choose Time Range “Everything” and clear Browsing & Download History, Cookies, and Cache

Safari on a Mac

- Click Safari in the upper left hand side of your screen. In the menu that appears, click Preferences
- In the window that appears, click the Privacy tab. Click the button Remove All Website Data
- Click Remove Now in the pop up window that appears

4. **User Guides:** Additional user guides for Lumea are available under the  ***Navigation Button.***
5. **Medicaid Information:** Click on the Launch Pad in Lumea to visit www.eddatasolutions.com and click on “Resource Center” where you can access information such as the EDMS Snapshot and Medicaid Regulations.
6. **Training and Events:** Contact your Program Specialist for more information or to schedule training.
7. **Social Media:** Follow EDMS on Social Media for upcoming events, product releases, federal, state, and company announcements. Click on the Launch Pad in Lumea to visit www.eddatasolutions.com and see the social media options available.
8. **Stay Informed:** Click on the Launch Pad in Lumea to visit www.eddatasolutions.com and click on “Contact EDMS.” Click on “Stay Informed” and enter your information to receive our newsletter.

NOTES