# 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!

- [ ] Review Unposted Sessions Report
  - Get all old sessions updated and submitted/posted so they can be submitted for reimbursement
  - If a session has not occurred as scheduled, Service Providers must either delete the session, or mark the student as Not Present and Submit/Post.

- [ ] Review Student Identity Verification (if Service Providers have permission to add new students to Lumea) so these pending students may be billed

- [ ] Check the Service Provider Records Report
  - Are all Service Providers that should be scheduling sessions doing so?
  - Check for missing practitioners/services (contracted practitioners, district staff, etc.)

- [ ] Review the Non-billable and Missing Information Reports in Secure Documents
  - Contact your District Claims Analyst for guidance, support, and assistance

- [ ] Update the District Calendar with any snow days

- [ ] Enter Exit Information for any students who have left the district

- [ ] Advance Student Grades in District Management

**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
  - Contact your Claims Analyst about rates for ESY
- [ ] Section 65 and Section 28 Review
  - CSR and 90-day Review planning for ESY
  - What to do if you won't bill for ESY
- [ ] Review Professional Oversight Setting
  - Are all Service Providers requiring Professional Oversight assigned to a Team Leader?
  - Are Team Leaders posting sessions submitted to them?

**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!

- [ ] Calendar Updates
  - Make sure you have accounted for all 2016-2017 SY closings
  - Input the 2017-2018 SY Calendar as it becomes final
- [ ] Rates for Providers
  - Make sure MSB has updated rates for all providers recording sessions
- [ ] Billing Dates Tab
  - ICD-10 codes input
  - Updates as needed with your Claims Analyst
- [ ] Caseload Management
  - Update Staff to Student Assignments as needed – ESY, new year, new staff
  - Update Team Leader Caseloads as needed – program changes, new staff
- [ ] Update Student Details – Remember, if this is managed in Adori, it will carry over to Lumea
  - Important fields that change annually – grade, school, status
  - Other considerations – SAC, contact information, Okay to Bill field
- [ ] Update User Details
  - Deactivate/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


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