Lumea™

Required Administrative Items

User Guide

Massachusetts Administrators

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Contents

User Management

User Approval

If new Service Providers, Administrators or Team Leaders register for the District Lumea™ account, make sure to approve them for your Lumea™ account in order to give them access, roles and permissions.

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

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

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.

Add Service Provider Type

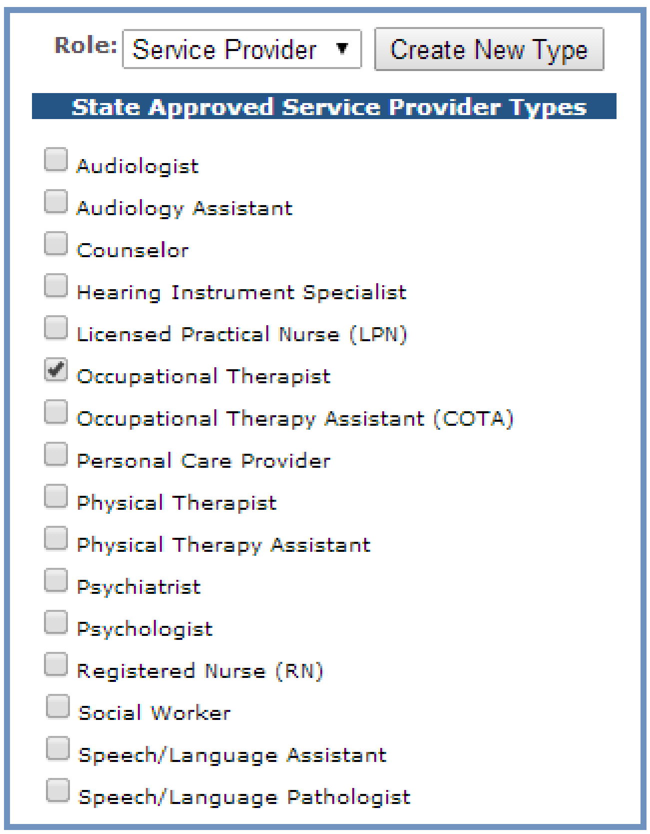
1) In the Administration menu, select User Management>User Details

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 State Approved Service Type



6) Select 

NOTE: *Only State Approved Service Provider Types are billable.*

Add Service Provider Credentials

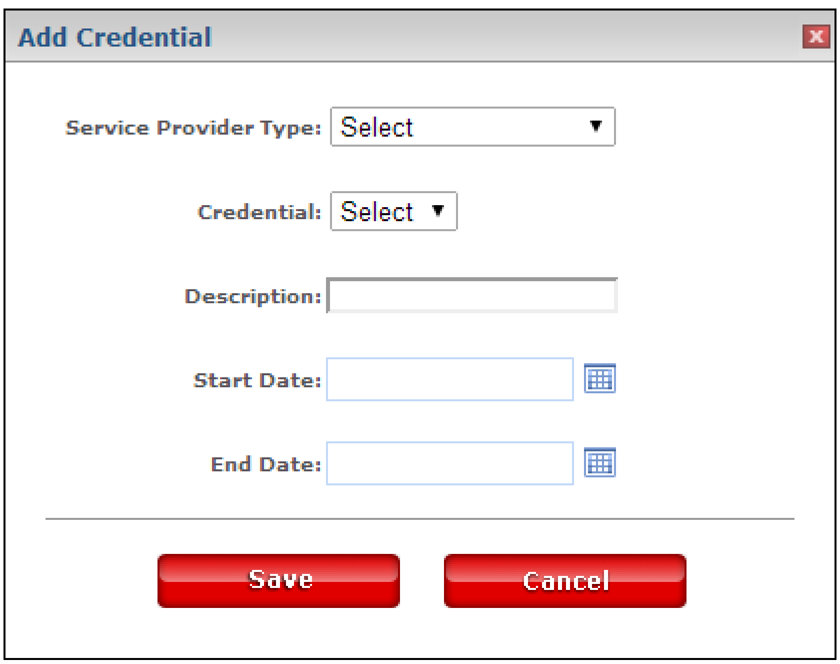
1) In the Administration menu, select User Management>User Details

2) Select Edit/View next to appropriate user

3) Select the Credentials tab

4) Select 

5) Enter appropriate data



6) Select 

NOTE: When updating a credential, do not edit the previous credential start and end dates. Add a new credential to build a history of credentials.

Student Management

Add a Student

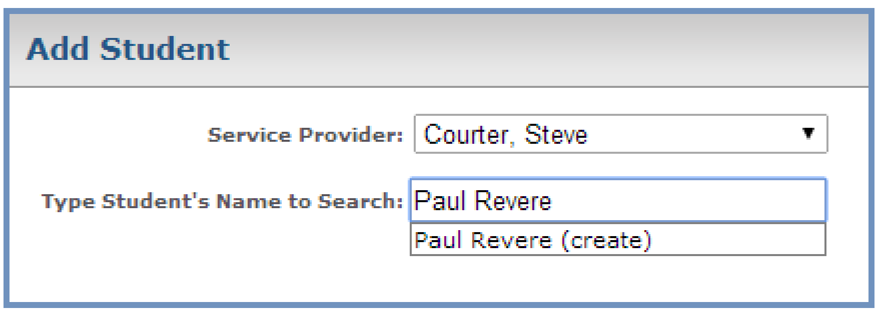
If new students enter the district's Special Education Program, make sure to add them to your Lumea™ account in order to check for Medicaid eligibility.

1) Select 

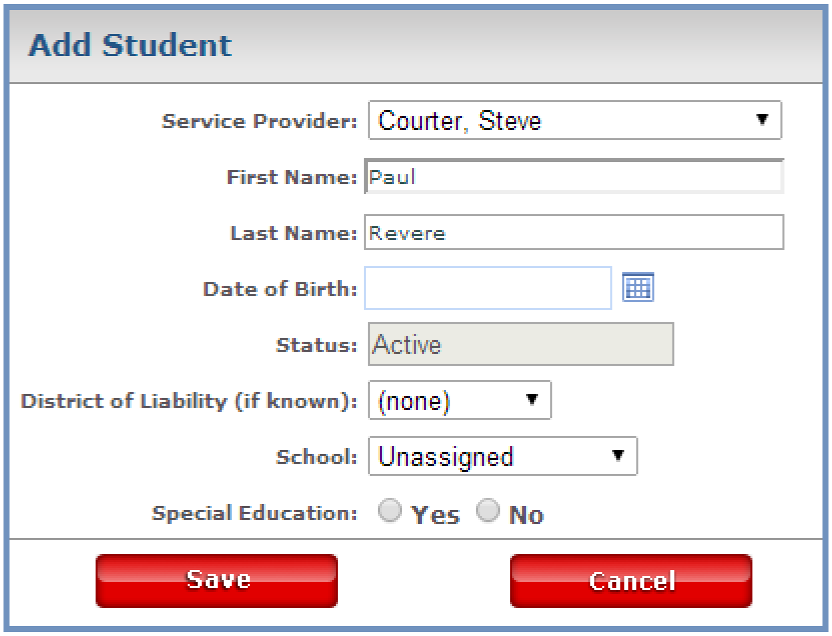
from the Quick Task Work Space

2) Select the student's Service Provider from the drop-down list

3) Type the student's name in the text box. Names will appear in a list as you type. If a record already exists for the student, select it from the list. If not, select the options at the top of the list that says "(create)".



4) Enter appropriate data, including Date of Birth, District of Liability and Special Education Status

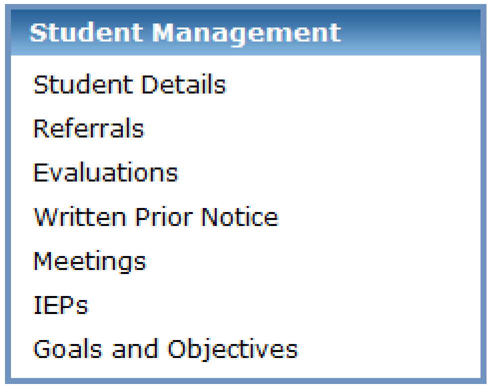


5) Select 

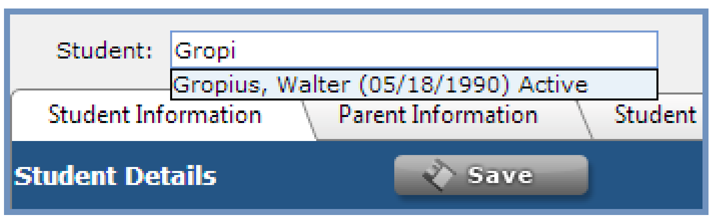
Note: If No is selected for Special Education Status, <u>**no**</u> services for the student will be billed. When a student has been added, the Okay to bill Medicaid toggle is automatically set to "N". Claims cannot be submitted for the student until this toggle has been set to "Y" or "None Selected".

Update Student Details

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



2) Search for Student by typing all or part of the student's last name in Student field at the top. As names appear in the list, choose the appropriate student from the list.



3) Update the following under General Student Information:

- School Name

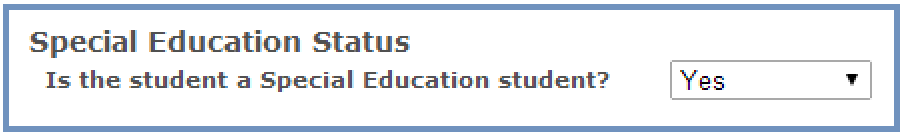
4) Update the following under Medicaid Information:

- OK to Bill Medicaid (None selected or Yes indicates billing <u>is</u> allowed)
- Medicaid ID (if known)

5) Update the following under SIMS Reporting

- DOE009 - Gender

6) Update Special Education Status if necessary



7) Select 

Student Identity Verification

When service providers have permission to add students, the potential for students to be added multiple times exists. Students added to Lumea™ by Service Providers always have a status of “Pending”. A district Administrator confirms that “Pending” students are “Active” through the process outlined below. Also, any duplicate records for a student can be merged into a single record. Administrators will want to review the Student Identity Verification window regularly to ensure that Pending students are updated to Active or to match a Pending student with an existing Active record for the same student.

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.
- You also have the option to search for matches 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

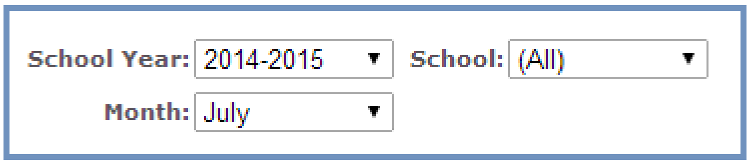
Possible Matches	Birthdate	School	Gender	
Byam, Wally	01/01/2000	My School		Use this match
Gropius, Walter	05/18/1990	Bauhaus	M	Use this match
Testing, Wally	01/01/2000	our school	M	Use this match

Caseload Reports

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) In the Administration menu, select "Service Provider Records Report" under Caseload Reports>District Reports.
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

Service Provider	Service Provider Type	9/01/2010	9/02/2010	9/03/2010	9/04/2010
Martin, Deborah	Ed Tech	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

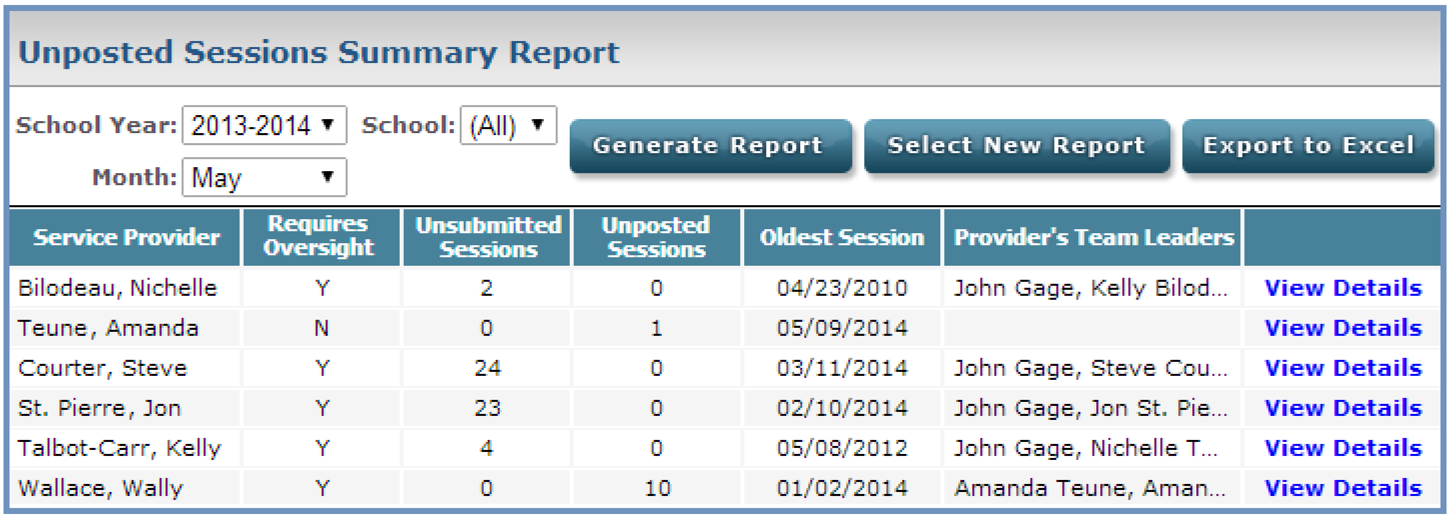
- A Green cell indicates all sessions have been posted for that Service Provider on that day
- A yellow cell indicates some sessions have yet to be posted by that Service Provider on that day
- A red cell indicates no sessions have been posted by that Service Provider on that day
- A blue cell indicates some session have been submitted by a provider who requires professional oversight
- 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, and cannot be billed. The Oldest Session field allows you to focus on sessions that are approaching the claim filing time limit (365 days).

1) In the Administration menu, select “Unposted Sessions Summary Report” under Caseload Reports>District Reports
2) Select School Year, Month, and School fields from drop-down menus
3) Select **Generate Report**

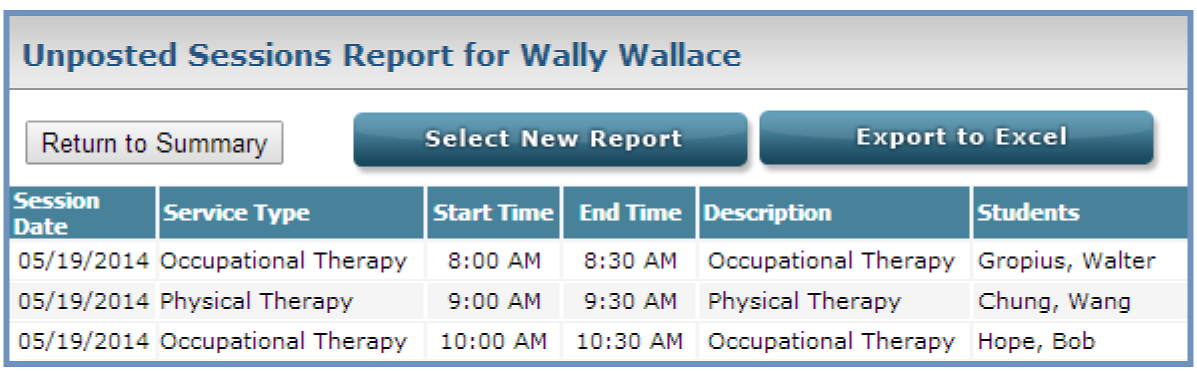


Unposted Sessions Summary Report

School Year: 2013-2014 School: (All) Generate Report Select New Report Export to Excel
Month: May

Service Provider	Requires Oversight	Unsubmitted Sessions	Unposted Sessions	Oldest Session	Provider's Team Leaders	
Bilodeau, Nichelle	Y	2	0	04/23/2010	John Gage, Kelly Bilod...	View Details
Teune, Amanda	N	0	1	05/09/2014		View Details
Courter, Steve	Y	24	0	03/11/2014	John Gage, Steve Cou...	View Details
St. Pierre, Jon	Y	23	0	02/10/2014	John Gage, Jon St. Pie...	View Details
Talbot-Carr, Kelly	Y	4	0	05/08/2012	John Gage, Nichelle T...	View Details
Wallace, Wally	Y	0	10	01/02/2014	Amanda Teune, Aman...	View Details

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



Unposted Sessions Report for Wally Wallace

Return to Summary Select New Report Export to Excel

Session Date	Service Type	Start Time	End Time	Description	Students
05/19/2014	Occupational Therapy	8:00 AM	8:30 AM	Occupational Therapy	Gropius, Walter
05/19/2014	Physical Therapy	9:00 AM	9:30 AM	Physical Therapy	Chung, Wang
05/19/2014	Occupational Therapy	10:00 AM	10:30 AM	Occupational Therapy	Hope, Bob

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

Service Provider Details Report

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

1) In the Administration menu, select "Service Provider Details Report" under Caseload Reports>District Reports
2) The results will display automatically

Service Provider Details Report

Service Provider	Provider Type	Credential	Expires	Current Caseload	Average Session Hours Per Week	In RMTS	Federal Funding Description	Federal Funding Amount
Anderson, Terri Lee	Behavioral Health Professional (BHP)			3	3	Yes		
Antell, Karla	Occupational Therapist	State Licensed Occupational Therapist	12/31/12	0	0	Yes	Federal Funding	20%
Bakley, Louise	Physical Therapist	State Licensed Physical Therapist	08/22/11	3	3	Yes	Federal Funding	30%
Bakley, Louise	Speech/Language Pathologist			3	3	Yes		
Batchelder, Judy	Rehabilitative Assistant			0	0	Yes		
Beaudry, Anne	Speech/Language Assistant			2	0	No		
Bickford, Mahlon	Speech Language Pathologist	State Licensed Speech/ Language Pathologist	02/26/12	1	1	Yes	Federal Funding	50%

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

NOTE: *To update Provider Types, Credentials and Federal Funding for a particular user, proceed to User Management>User Details*

Calendar Management

District - No School Days

NOTES:

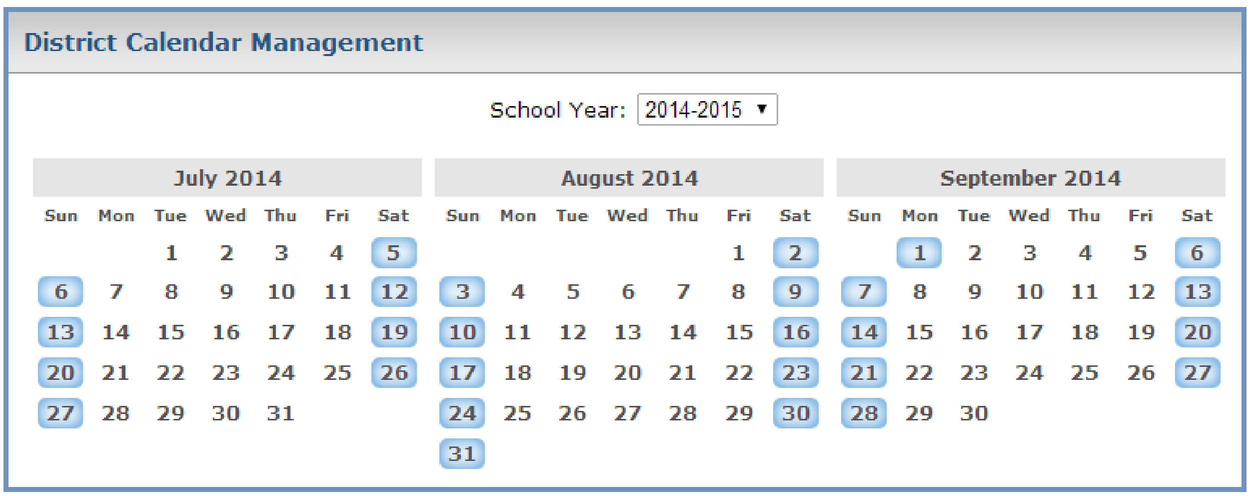
- *Only mark full days off as non-school days. Leave half-days marked as a "School Day" so the valid sessions on that day can be billed.*
- *All District Non-School days are automatically copied to each of the school's calendars. Differences in specific school schedules can be accommodated using the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

1) In the Administration Menu, select Calendar Management

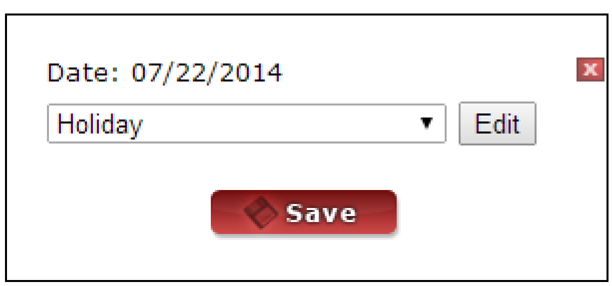
2) Select District—No School Days

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

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



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



6) Select 

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Revision Date 8/6/2014

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 of the school's calendars. Use the instruction below to set non-school days for specific schools that are in addition to district-wide non-school days.*

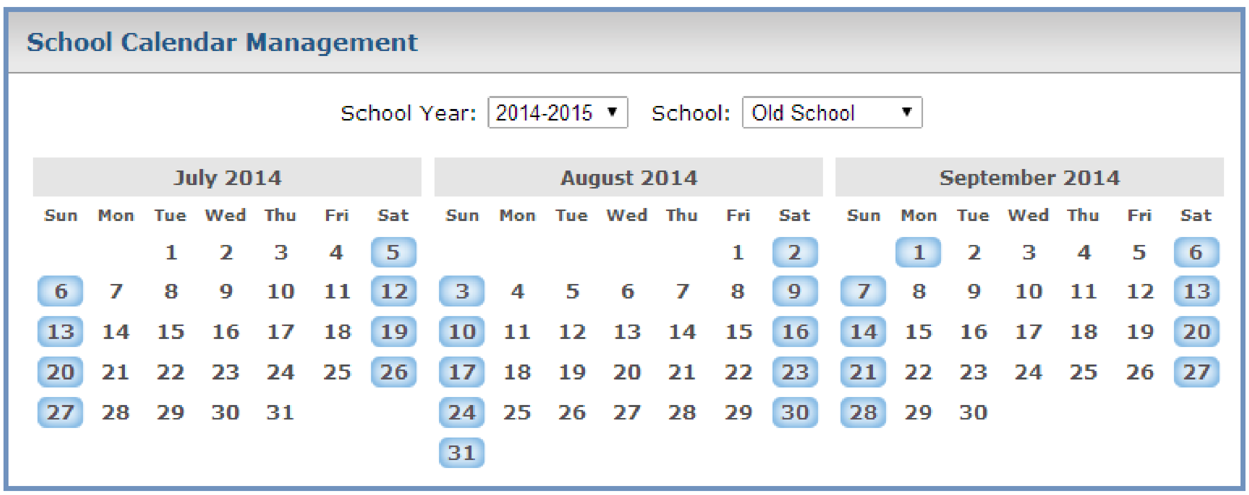
1) In the Administration Menu, select Calendar Management

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 date has been selected, indicate the reason for no school on that day

7) Select