

Lumea Administrative Tasks and Recommended Schedule

Below is a table of tasks and responsibilities that should be handled by those district staff who are assigned with Administrator Roles in Lumea. For detailed instructions for each task, please review the Lumea Required Administrative Items User Guide.

Task	Location in Lumea (Administrator Role)	Recommended Administrator	Recommended Frequency	Description
Update User Roles	User Management>User Details	Central Office Administrator or Building Level Administrators with knowledge of Lumea User Role requirements	As often as new users register and/or need to have Roles added or removed	i.e. if a Licensed Practitioner of the Healing Arts is already assigned as a "Service Provider" Role, they may need to be assigned the "Team Leader" Role in order to "co-sign" sessions submitted by Rehabilitative Assistance providers and assistants (only needed when the electronic signature feature is being utilized by the district)
Update User Permissions	User Management>User Details	Central Office Administrator or Building Level Administrators with knowledge of Lumea User Permission requirements	Only in rare occasions or exceptions where User permissions need to be changed from default User permissions	i.e. if some users are given permission to add students, but others are not, individual User permissions would need to be changed. <u>This option can be limited to specific Administrators.</u>
Update User Types	User Management>User Details	Central Office Administrator or Building Level Administrators with knowledge of Lumea User Type requirements	Upon registration of new user. This setting will limit the service area choices the particular User will have when logging sessions as a Service Provider	i.e. after a paraprofessional (1:1 or shared Aide) registers for Lumea, the Administrator should immediately, upon User approval, set the User Types so the service area choices are limited for the Service Provider

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Update Credentials	User Management>User Details	Central Office Administrator or Building Level Administrators with knowledge of Lumea User credentials	Immediately upon the User approval following the registration process, and each time a credential expires	By maintaining a history of credentials for each User (Service Provider), the district can run reports that will show the credential status of all Medicaid Service Providers using the district Lumea account. This allows the Central Office administrator to know which outstanding or expiring credentials need to be obtained for compliance purposes.
User Approval	User Management>User Approval	Central Office Administrator or Building Level Administrators with knowledge of new User registrations	As often as new users are registering for the district Lumea account.	New Users may register for the district Lumea account by going to https://login.msb-services.com/ and following the registration instructions. Administrators will need to approve Users before the User will have access to the Lumea account. <u>This option can be limited to specific Administrators.</u>
Caseload Management	Caseload Management	Central Office Administrator or Building Level Administrators with knowledge of Service Provider or Team Leader assignments	Whenever a Service Provider's student caseload for service delivery changes, or whenever a Licensed Practitioner of the Healing Arts (aka Team Leader for Lumea purposes) is assigned to review sessions for Service Providers they direct or provide consultation to	In order for Service Providers to see students in their caseload column, the Administrator will need to "assign" students to the Service Providers by utilizing the Caseload management feature of Lumea. <u>This option can be limited to specific Administrators.</u>

Task	Location in Lumea (Administrator Role)	Recommended Administrator	Recommended Frequency	Description
Caseload Reports	Caseload Reports>District Reports> Service Provider Records Report	Primarily Central Office Administrators and Building Administrators who are monitoring the completion of sessions by Service Providers in Lumea	Every two weeks	This report replaces the former “practitioner records report” formerly sent by MSB. Administrators can monitor the level of participation and utilization of Lumea by Service Providers.
Caseload Reports	Caseload Reports>District Reports> Unposted Sessions Summary Report	Primarily Central Office Administrators and Building Administrators who are monitoring the posting of sessions by Service Providers in Lumea	Every two weeks	Administrators can more closely monitor Service Provider participation by running this report to see who has un-posted/unsubmitted sessions, how many, and the specifics of the un-posted/unsubmitted sessions.
Caseload Reports	Caseload Reports>District Reports> Service Provider Details Report	Primarily Central Office Administrators and Building Administrators who wish to see an overview of registered users, their credentials and federal funding status, etc.	Monthly	Administrators can also get an idea of how many students are in the Service Provider caseload and how many average session hours are being logged by the Service Providers.
Caseload Reports	Caseload Reports>District Reports> Service Provider Activity	Primarily Central Office Administrators and Building Administrators who are monitoring the completion of sessions by Service Providers in Lumea	When Administrators would like to monitor the activity of given provider(s) who may be delinquent with posting sessions or not fully utilizing Lumea	This detailed report allows Administrators to see specific activity, both posted and unposted, for all or for specific Service Providers using Lumea.

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Caseload Reports	Caseload Reports>District Reports> Student Records Report	Primarily Central Office Administrators and Building Administrators who would like to see more specific information about services delivered to a particular student	When Administrators are looking for information related to services documented in Lumea for particular students	This report is similar to the Service Provider Records Report, but rather than showing sessions logged by Service Provider, it shows sessions for particular students logged by any Service Provider using Lumea
Student Management	Student Management>Student Details>Student Information	Central Office Administrator or Building Level Administrators with permissions to update student information	As often as new students are entering or exiting special education or the district; also when student information that is pertinent to Medicaid changes	Districts may want to set certain Administrators' permissions to allow or not allow the ability to "edit" student information.
Student Identity Verification	Student Identity Verification>Student Identity Verification	Central Office Administrator or Building Level Administrators with knowledge of new students being added by Service Providers (when Service Providers' permissions allow the "add student" function)	Weekly	If Service Providers are permitted to add (create) students to their own caseloads, Administrators will want to review Student Identity Verification weekly to "activate" these students so sessions can be submitted for reimbursement .

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Calendar Management	Calendar Management>District - No School Days	Central Office Administrator	At the start of each school year, the Central Office Administrator should update the district calendar in Lumea; the Administrator will also want to add any unexpected school closing days, such as snow days	Setting the District and/or School calendar with scheduled days off (see "School – No School Days") will prevent any posted sessions from being submitted for reimbursement on those days