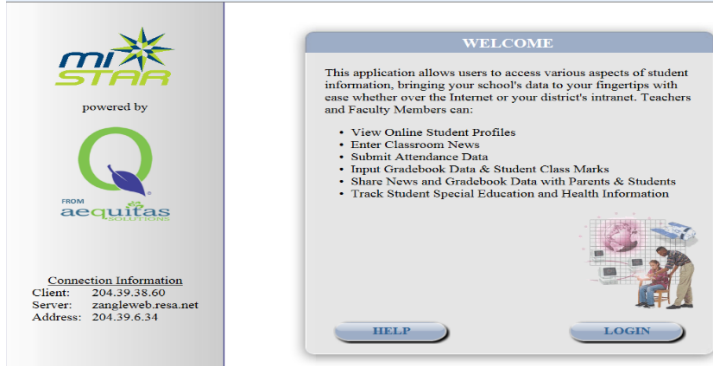


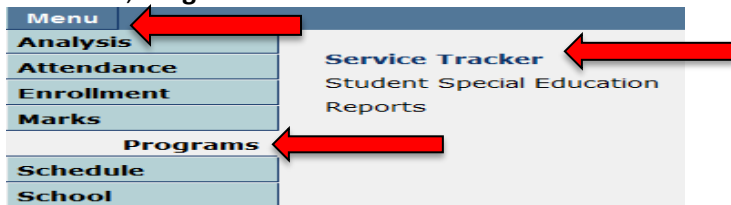
# Recording Designated Case Management Services In MISTAR “Service Tracker” Quick Start Guide

## Logging on to MISTAR Q Service Tracker

Log in to MISTAR using your Name (last name, first name), and Password.



Click **Menu, Programs** and Select **“Service Tracker”** from the list.



After you’ve logged in - The first thing you will see is a *“Shade Caseload”* popup window. The shade caseload lists all of the students assigned to you for this school year. To select a student to enter services for, use the slide bar on the right side of the box to scroll through your students until you find the student you are looking for. Then click on their name to select them.

Local ID	Student	Birth Date	Grade	Track
20141256	Abernathy, Tara	02/14/2001	10	16/17 T Saturn High-Q3.4 (Saturn High)
20143281	Abraham, Madison	10/04/2011	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136231	Adams, Christopher	09/21/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141179	Aldrich, Owen	10/12/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20142036	Baker, Jaylen	01/27/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136175	Betts, Anthony	08/19/2006	5	16/17 T Umbriel Elem-Q3.4 (Umbriel Elementary)
20139114	Bilko, Keith	01/07/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20141170	Bobbitt, Ethan	11/13/2011	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136932	Botkins, Joseph	04/12/2006	5	16/17 T Umbriel Elem-Q3.4 (Umbriel Elementary)
20136778	Boyd, Stephanie	08/04/2005	6	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138867	Burroughs, Michael	04/14/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141208	Chapman, Amna	06/28/2012	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20137732	Clotfelter, Macy	08/27/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141145	Dahabra, Brittany	05/29/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20140992	Dennis, Deon'ta	02/11/2012	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20133548	Dennis, Willie	12/05/2001	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20143607	Embry, Christina	05/31/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20138510	Fleming, Ryan	04/24/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20138572	Flemming, Raphael	10/18/2004	7	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138209	Fortenberry, Hayden	12/28/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20140450	Friske, Marlin	12/11/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20134498	Gazda, Gregory	08/24/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20134471	Gibbs, Maya	04/02/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138068	Glover, Jayon'te	04/14/2004	7	16/17 T Vesta Middle-Q3.4 (Vesta Middle)

**\*\*NOTE –** Normally you will see a Red \* next to the student’s names that are Medicaid eligible. You won’t see any \* on this screen because it’s showing a demo district.

The next screen you will see is the student’s information page. Displayed at the top is the student’s demographic information. Underneath this is the student’s Special Education Placement information. Listed are the dates of placement, type of service, location, provider’s name and service time. Before entering services for a student, make sure the support service delivery method is Direct or Direct/Consult.

To the right of the placements box is Special Education Program information.

- If the Medicaid consent says “one-time consent received” your district has obtained consent to bill Medicaid. If the consent status is “unset”, you may want to contact your SE office and let them know.
- If the Personal care box is checked – personal care is marked yes on the student’s IEP.
- If the Transported box is checked – specialized transportation is marked yes on the IEP.

Question Ridge Schools - Question Ridge Dst 16/17-Q3.4

Student Name: Stephanie Boyd, Local ID: 20136778, Gender: Female, Birth Date: 8/4/2005, Grade: 6, Track: 16/17 T Vesta Middle-Q3.4, Status: Active, Counselor: Unassigned

Dates	Type/Service	Location/Provider	Service Time
05/19/2015	Supporting	Jefferson Elementary	0.25
09/06/2016	290-Speech&Language Impaired	Anthony, Anne	Hours per Week
Support Services Delivery Method: Consultation			
09/07/2016	Supporting	Jefferson Elementary	0.25
	290-Speech&Language Impaired	Medicaid, Linda	Hours per Week
Support Services Delivery Method: Direct/Consultation			
05/19/2015	Primary	Jefferson Elementary	3.00
	194-K-12 Lvl Resource Prg	Duplicate, Annie	Hours per Week

IEPDate:  
 Medicaid Consent: One-Time Consent Received  
 Personal Care:   
 Transported:

Click the + Service History button to view all the services you have saved for the student in the current school year (if any). Services with a Status of “Open” are not complete. Completed services will have a status of either “Ready to Bill” (which means you have completed the service, but RESA has not yet billed it), or “Billed” (which means the service was both completed and billed).

### Entering A Service – Service History

To record a service for the student, click on the + Next to Service History and click the “Add” button.

Service History

Add Edit Delete Copy Filter Filtered By Year: 2017, Practitioner: Swan, Amanda

No services available for selected filter.

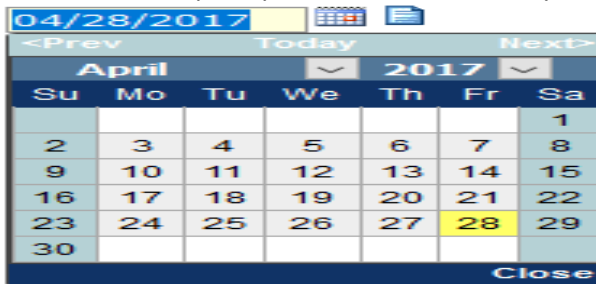
Monthly History

## Monthly History - Edit Service Screen

This is where you enter the details of the service. There are six basic steps to entering a service: 1) Enter the Service Date, 2) Select the student's Presenting Problem, 3) Select the Procedure Code, 4) Select a TCM code, 5) Enter a Service Note, 6) Click on Submit.

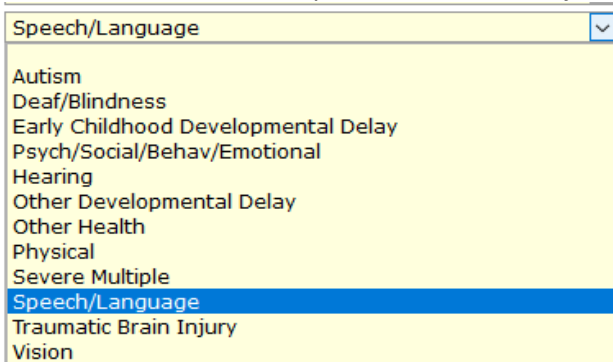
### Service Date

On the Record Service screen (shown below), go to the "Service Detail" section and start by entering your Service Date. We recommend the last school day of the month because you are recording all the services you rendered throughout the entire month. You can either type the date in the following format: 01/31/2017, OR you can use the little blue calendar icon to pull up a calendar and select your date.



### Presenting Problem

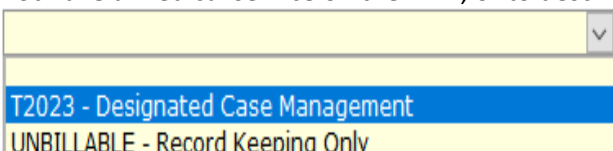
When your date has been accepted, use the drop down box to select a Presenting Problem. For case managers the presenting problem is a medical service on the student's IEP that justifies case management services. For example, if Speech services are on the IEP, select Speech/Language, or for Social Work select Psych/Social/ Behavioral/Emotional. If the student receives multiple medical services, just select one.



### Procedure Code

You have two options for procedure codes. If you have billable Designated Case Management services during the month, you may use procedure code T2023. This code is used when the student has at least one medical service on their IEP (Speech, Social Work, OT, PT, Nursing, Psychology, Audiology, Personal Care or Orientation and Mobility) and you have contact with a parent (or guardian), another staff member, or an outside agency to discuss services related to the medical issue. These contacts include preparing for and facilitating MET and IEP meetings (except for the initial MET/IEP), face-to-face meetings and consultations, phone calls and emails. Case Management also includes record-keeping that relates to the medical service(s) on the IEP (such as preparing progress reports, behavior plans, etc.)

Use the UNBILLABLE code for the initial MET and IEP, contacts with parents/staff/agencies regarding students that do not have a medical service on their IEP, or to describe why no billable service was rendered during the month.



TCM Code

Targeted Case Management Code – When procedure code T2023 has been selected, you will need to identify the corresponding TCM code. Always pick the TCM Code that best describes any one of the services you rendered during the month.

C - Follow-up re: Student Services

- A - Arrange for Periodic Evaluations
- B - Assist Families w/Services
- C - Follow-up re: Student Services**
- D - Maintain Case Records
- E - Coordinate Services w/Parents
- F - Monitor/Recom. Plan of Action
- G - Coord. Evals/Other Services
- H - IEP Plan Development/Review
- I - Link/Coord Health Services
- J - Summarizing Consults
- K - Coord Continuum of Services

Notes

The service note field is now a mandatory field, but is actually intended for “direct” service notes. This means you have two options for this field. You can type a detailed description of that months case management services here or you can type “See monthly note” in this box.

See Monthly Note

Submit

The Submit button saves your service information, clears all information from the Service Detail section, and allows you to scroll down to the “Monthly History/Summary Detail” section to finish recording your service(s) for the month. Click the + Monthly History button. From here, you can write a summary of your services for the month, and make your service “Ready to Bill”.

Menu Student Reports Home

Question Ridge Schools - Question Ridge Dst 16/17-Q3.4

Student Name	Local ID	Gender	Birth Date	Grade	Track	Status	Counselor	Programs
Stephanie Boyd	20136778	Female	8/4/2005	6	16/17 T Vesta Middle-Q3.4	Active	Unassigned	

Student 10 of 57  Include Inactive  Include Exited Add

Service History Group Services

**Service History**

**Monthly History**

Dates	Type/Service	Location/Provider	Service Time
05/19/2015	Supporting	Jefferson Elementary	0.25
09/06/2016	290-Speech&Language Impaired	Anthony, Anne	Hours per Week
Support Services Delivery Method: Consultation			
09/07/2016	Supporting	Jefferson Elementary	0.25
	290-Speech&Language Impaired	Medicaid, Jill	Hours per Week
Support Services Delivery Method: Direct/Consultation			
05/19/2015	Primary	Jefferson Elementary	3.00
	194-K-12 Lvl Resource Prg	Duplicate, Annie	Hours per Week

IEPDate:  
 Medicaid Consent: One-Time Consent Received  
 Personal Care:   
 Transported:

Service History

Add Edit Delete Copy Filter Filtered By Year: 2017, School: All Schools, Practitioner: Medicaid, Jill

Date	Procedure Code	Practitioner	Start	End	Status	Status Reason
04/28/2017	T2023 - Designated Case Management	Medicaid, Jill			Open	

Monthly History

Edit Ready To Bill Filter Filtered By Year: 2017, Practitioner: Medicaid, Jill

Month	Practitioner	Signed	Status
April 2017	Medicaid, Jill		Open

## Finishing the Month and Making Service “Ready to Bill”

### Monthly Progress Note – Monthly History

Select the month you are finishing up (select the month you wish to finish up by clicking on the row). The highlighted row is the “selected” month, you can move to the next step by clicking the Edit button or by double clicking on the selected/highlighted row.

When you click on the edit button, an edit summary window will appear. Next, click in the Monthly Progress note box and type a detailed summary of the months case management services. Remember to include actual service dates, what you did, with whom (Parent, Speech Path, Social Worker, OT, PT, psychologist, Nurse, etc) and why. Make sure that your note describes how the service relates to a “medical” service on the student’s IEP. Notice that under the Monthly progress note box your daily service notes are listed and you copy and paste them directly in to the Monthly Progress Note box.

Menu Student Reports Home Question Ridge Schools - Question Ridge Dst 16/17-Q3.4

Service Tracker

Student Name	Local ID	Gender	Birth Date	Grade	Track	Status	Counselor	Programs
Stephanie Boyd	20136778	Female	8/4/2005	6	16/17 T Vesta Middle-Q3.4	Active	Unassigned	

Service History Group Services

Cancel Reset Submit **Update**

**Edit Summary**

Practitioner: Medicaid, Jill (20000663) Practitioner's District Code: 82002

Monthly Progress Date: April 2017

Monthly Progress Note: 4.18 - Met with Speech Pathologist. Discussed the student's speech goals. 4.26 - Met with mom. Discussed the student's progress with speech goals and provided invitation for student's upcoming IEP meeting.

Practitioner Signature: Jill Medicaid Date Signed:

Billing Status: Open

Service Date	Procedure Code	Notes
04/28/2017	T2023 - Designated Case Management	"See Monthly Note"

Click on the “Submit” button to save your note (you are returned to the Service History Screen). From here, you will select the month you wish to mark “Ready to Bill”.

### Marking Service Ready to Bill – Monthly History

Menu Student Reports Home Question Ridge Schools - Question Ridge Dst 16/17-Q3.4 Date: 06/15/2017 File Help Log Out

Service Tracker

Student Name	Local ID	Gender	Birth Date	Grade	Track	Status	Counselor	Programs
Stephanie Boyd	20136778	Female	8/4/2005	6	16/17 T Vesta Middle-Q3.4	Active	Unassigned	

Service History Group Services

Placements:

Dates	Type/Service	Location/Provider	Service Time
02/19/2015	Supporting	Jefferson Elementary	0.25 Hours per Week
09/06/2016	290-Speech&Language Impaired	Anthony, Anne	0.25 Hours per Week
09/07/2016	Supporting	Jefferson Elementary	0.25 Hours per Week
05/19/2015	Primary	Jefferson Elementary	3.00 Hours per Week

IEP Dates: Medicaid Consent: One-Time Consent Received

Personal Care: Transported:

Confirmation

This will mark all open services within the given month as "Ready To Bill".

Press OK to continue or Cancel to quit.

OK Cancel

Monthly History

Month	Practitioner	Signed	Status
April 2017	Medicaid, Jill	09/07/2017	Open

Monthly Summary Details

Practitioner Signature: Jill Medicaid

Practitioner Sign Date: 09/07/2017

Billing Status: Open

Monthly Progress Note: 4.18 - Met with Speech Pathologist. Discussed the student's speech goals. 4.26 - Met with mom. Discussed the student's progress with speech goals and provided invitation for student's upcoming IEP meeting.

Select the month you are finishing up (select the month you wish to finish up by clicking on the row). The highlighted row is the “selected” month, you can move to the next step by clicking the Edit button or by double clicking on the selected/highlighted row.

Select the month Click on the “Ready to Bill” button and when the Medicaid Confirmation pop up appears, click on the OK button. Clicking the OK button marks a given month as “Ready to Bill”.

## Completing OPEN Services

If you notice on the Service History screen that a student has a service with a status of “Open”, you need to complete your monthly summary note and make the service status “Ready to Bill”. To do this, click on the + **Monthly History** button.

Service History							
Add		Edit	Delete	Copy	Filter	Filtered By Year: 2017, Practitioner: Swan, Amanda	
Date	Procedure Code	Practitioner	Start	End	Status	Status Reason	
01/31/2017	T2023 - Designated Case Management	Swan, Amanda			Open		

### + Monthly History

Then, on the Monthly History screen, click on the Summary Date link for the month that had the Open service (in this case we would click on January 2017).

Service History							
Add		Edit	Delete	Copy	Filter	Filtered By Year: 2017, Practitioner: Swan, Amanda	
Date	Procedure Code	Practitioner	Start	End	Status	Status Reason	
01/31/2017	T2023 - Designated Case Management	Swan, Amanda			Open		

### Monthly History

Month	Practitioner	Signed	Status
January 2017	Swan, Amanda		Open

This takes us to the Edit Summary section where we can enter our note(s) in the Monthly Progress Note field and Submit/save the monthly note.

Service History							
Add		Edit	Delete	Copy	Filter	Filtered By Year: 2017, Practitioner: Swan, Amanda	
Date	Procedure Code	Practitioner	Start	End	Status	Status Reason	
01/31/2017	T2023 - Designated Case Management	Swan, Amanda			Open		

Monthly History			
Edit	Ready To Bill	Filter	Filtered By Year: 2017, Practitioner: Swan, Amanda

Month	Practitioner	Signed	Status	Monthly Summary Details			
January 2017	Swan, Amanda	02/15/2017	Open	Practitioner Signature: Amanda Swan Practitioner Sign Date: 02/15/2017 Billing Status: Open Monthly Progress Note: On 1/9/2017 - I mailed the invitations for the upcoming IEP meeting. The invitation was mailed to the team members and the parent. On 1/16/2017, I prepared for the upcoming meeting by reviewing the student's current IEP goals. On 1/17/2017, I spoke with the social worker regarding some behavior concerns. On 1/23/17, I convened the IEP meeting.			

The submit returns you to the Service History Screen, select the month you wish to wrap up and click “Ready to Bill”. To mark a given months services “Ready to Bill” you must click OK.

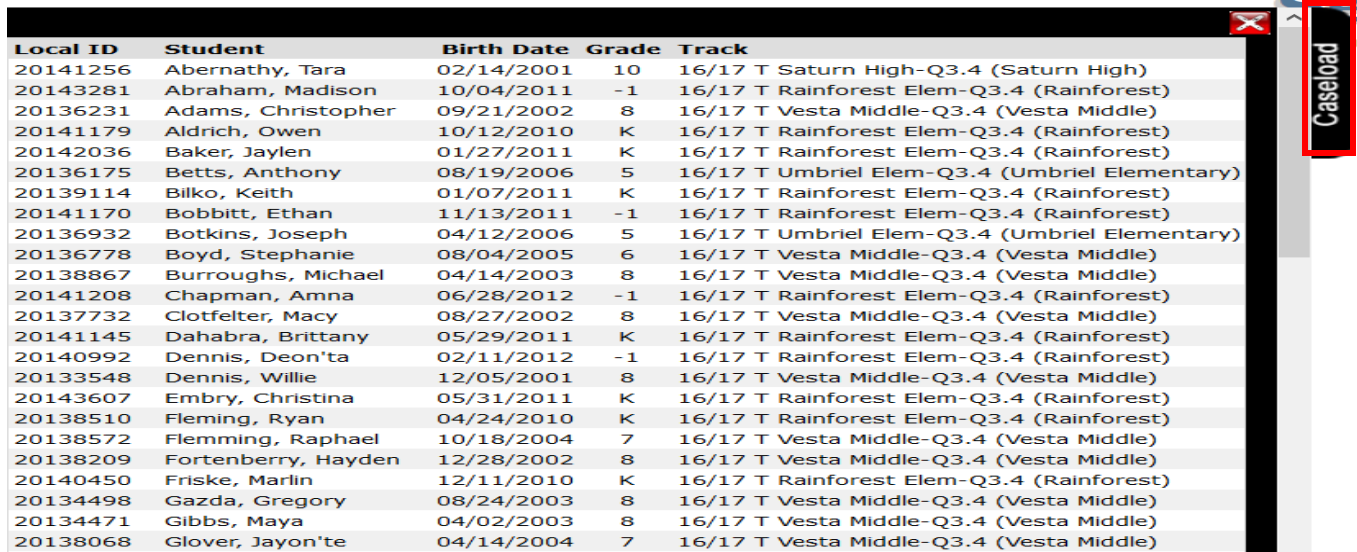
**Confirmation**

? This will mark all open services within the given month as "Ready To Bill".

Press OK to continue or Cancel to quit.

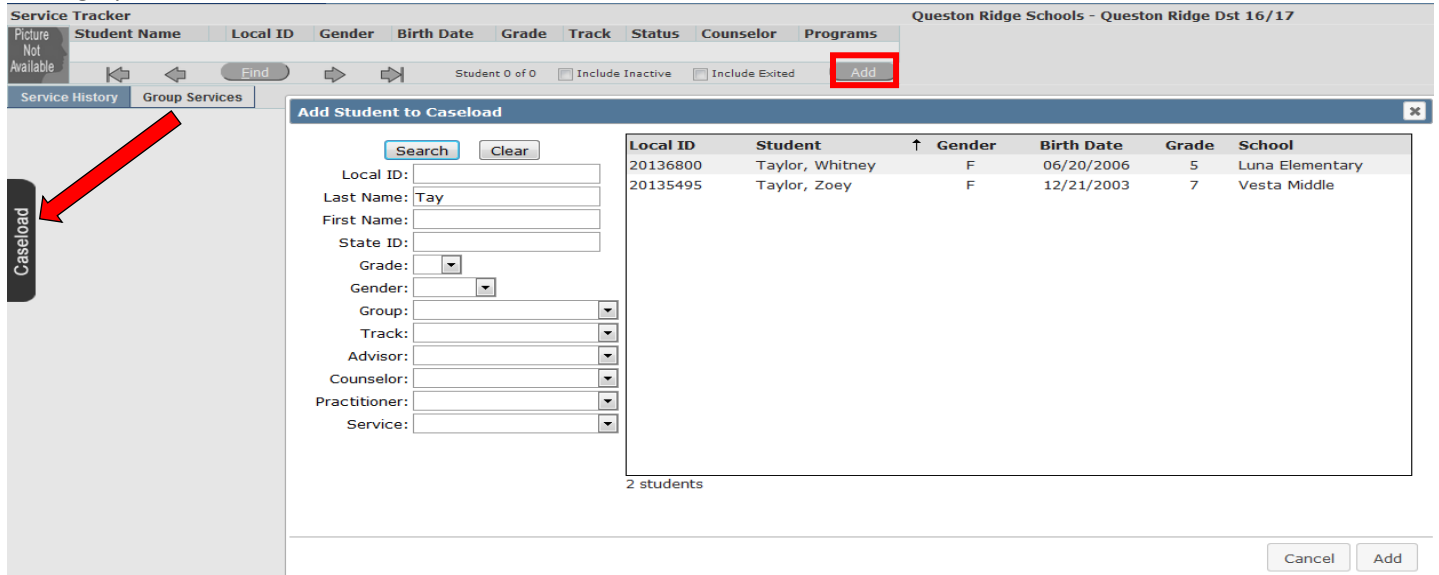
## Adding a Student to Your “Temporary” Caseload

To Add a student to your caseload, you will first need to close the Shade Caseload pop up by click on the red x.



Local ID	Student	Birth Date	Grade	Track
20141256	Abernathy, Tara	02/14/2001	10	16/17 T Saturn High-Q3.4 (Saturn High)
20143281	Abraham, Madison	10/04/2011	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136231	Adams, Christopher	09/21/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141179	Aldrich, Owen	10/12/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20142036	Baker, Jaylen	01/27/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136175	Betts, Anthony	08/19/2006	5	16/17 T Umbriel Elem-Q3.4 (Umbriel Elementary)
20139114	Bilko, Keith	01/07/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20141170	Bobbitt, Ethan	11/13/2011	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20136932	Botkins, Joseph	04/12/2006	5	16/17 T Umbriel Elem-Q3.4 (Umbriel Elementary)
20136778	Boyd, Stephanie	08/04/2005	6	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138867	Burroughs, Michael	04/14/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141208	Chapman, Amna	06/28/2012	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20137732	Clotfelter, Macy	08/27/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20141145	Dahabra, Brittany	05/29/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20140992	Dennis, Deon'ta	02/11/2012	-1	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20133548	Dennis, Willie	12/05/2001	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20143607	Embry, Christina	05/31/2011	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20138510	Fleming, Ryan	04/24/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20138572	Flemming, Raphael	10/18/2004	7	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138209	Fortenberry, Hayden	12/28/2002	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20140450	Friske, Marlin	12/11/2010	K	16/17 T Rainforest Elem-Q3.4 (Rainforest)
20134498	Gazda, Gregory	08/24/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20134471	Gibbs, Maya	04/02/2003	8	16/17 T Vesta Middle-Q3.4 (Vesta Middle)
20138068	Glover, Jayon'te	04/14/2004	7	16/17 T Vesta Middle-Q3.4 (Vesta Middle)

To search for a student, click on the Add button on the right hand side of the screen, underneath the student's demographic banner.



Service Tracker

Question Ridge Schools - Question Ridge Dst 16/17

Student Name Local ID Gender Birth Date Grade Track Status Counselor Programs

Find Student 0 of 0  Include Inactive  Include Exited **Add**

Service History Group Services

**Add Student to Caseload**

Search Clear

Local ID:

Last Name:

First Name:

State ID:

Grade:

Gender:

Group:

Track:

Advisor:

Counselor:

Practitioner:

Service:

Local ID	Student	Gender	Birth Date	Grade	School
20136800	Taylor, Whitney	F	06/20/2006	5	Luna Elementary
20135495	Taylor, Zoey	F	12/21/2003	7	Vesta Middle

2 students

Cancel Add

Notice that the caseload window does not disappear completely; but it remains on your screen as a tab. You can reopen the Shade Caseload screen by clicking on it.

This will bring up the “add student to caseload” window. Here you see all of the special education students enrolled in your school track. \*\*NOTE – Normally there will be a Red \* next to the student's name that are Medicaid eligible. You won't see any on this screen because it's showing a demo district.

Here, you can enter the student's last name and click on the search button at the top of the screen. If you're not sure how to spell the student's name, you can enter the first couple of letters and when you click on search, it will bring up all of the students that last names start with those letters. This will also work if you need to search by the student's first name. In addition, you can use the scroll slider to scroll down until you see their name.

When you find the student you need, select their name to highlight it and then click on the ADD button at the bottom of the add student to caseload window. By doing this, it will take you directly into the Record Service Record for the

student, which is where you will record your daily service. Student will remain on your caseload as long they have “Open” or “Ready to Bill” services.

If you have Medicaid policy questions, or if you need assistance with recording services, please feel free to contact the Medicaid Reimbursement Office at Wayne RESA:

Leanne Smith at 734-334-1464 – Email: [smithle@resa.net](mailto:smithle@resa.net)

Tia Williams at 734-334-1397 – Email: [williat@resa.net](mailto:williat@resa.net)