

Entering a Monthly Summary Com Hab

eVeroMobile App

*Monthly Summary is a Medicaid required document that is encompassed in a Self-Hired Community Habilitation staff's responsibility. The monthly summary should be a short paragraph outlining that month's successes, challenges, and any exciting future plans.

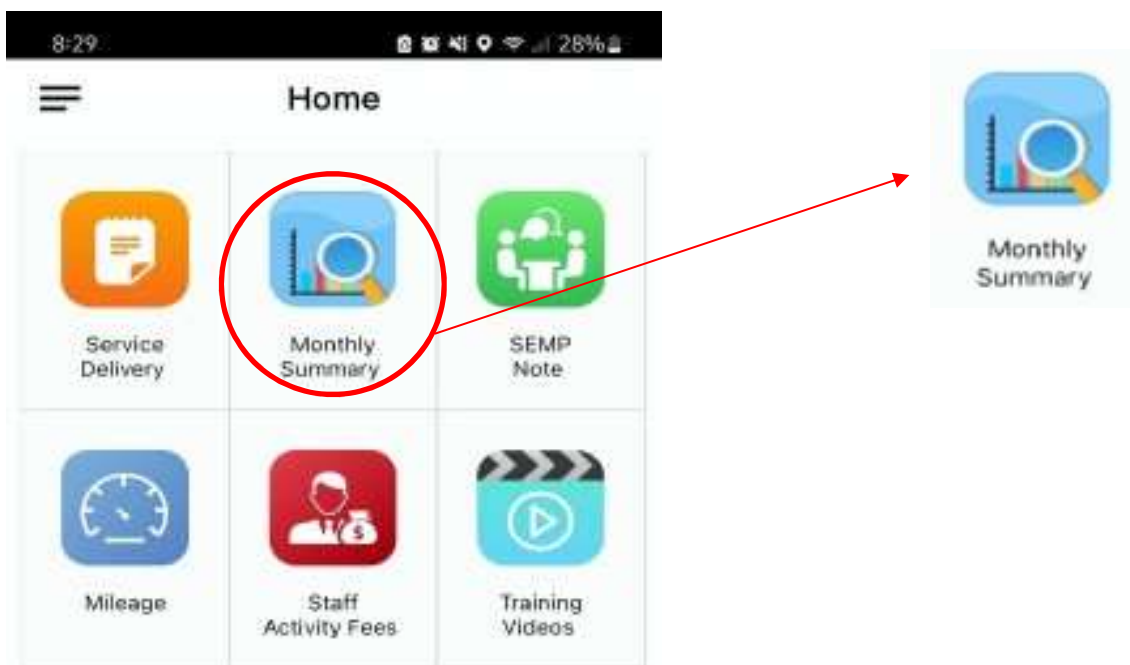
*eVeroMobile app- app utilized by staff to document services when providing NYS Medicaid supports

Monthly Summary due within the first week of the month – as communicated by Self-Directed team and eVero Communication

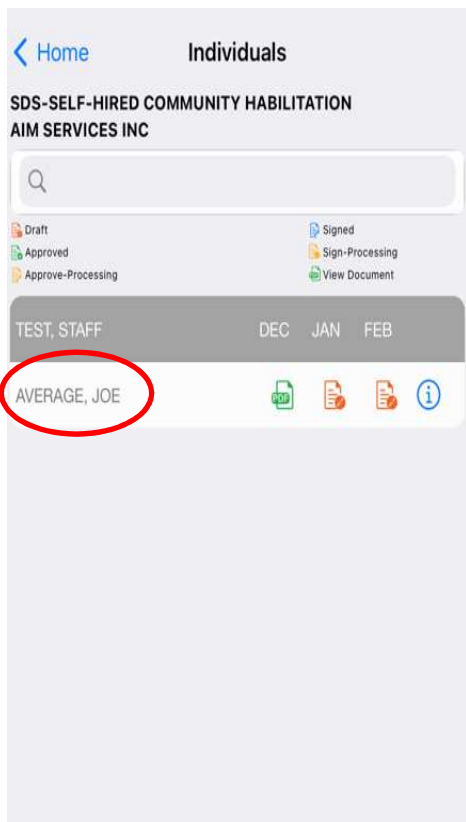
Example of a monthly summary note:

Joe had a great month. We spent a lot of time in the community. Joe has progressed in his laundry skills. He pays attention to when the washer and dryer are complete and knows to transfer clothing on his own. Joe requires promoting to fold his laundry but has made great progress.

1. Log into the eVero application and select the blue 'Monthly Summary' tile.



2. Select the individual's name



Individuals

SDS-SELF-HIRED COMMUNITY HABILITATION
AIM SERVICES INC

Search

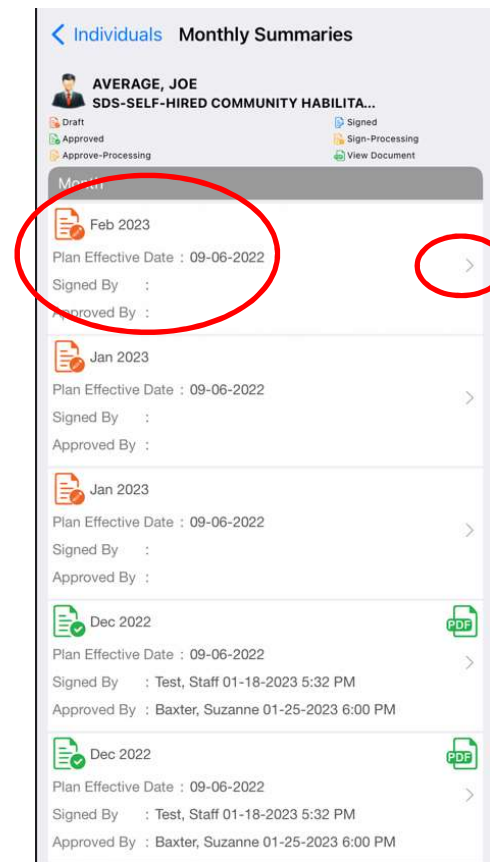
Draft
Approved
Approve-Processing

Signed
Sign-Processing
View Document

TEST, STAFF DEC JAN FEB

AVERAGE, JOE

3. Select the month being completed (grey arrow)



Individuals Monthly Summaries

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION

Draft
Approved
Approve-Processing

Signed
Sign-Processing
View Document

Feb 2023

Plan Effective Date : 09-06-2022

Signed By :>

Approved By :

Jan 2023

Plan Effective Date : 09-06-2022

Signed By :>

Approved By :

Jan 2023

Plan Effective Date : 09-06-2022

Signed By :>

Approved By :

Dec 2022

Plan Effective Date : 09-06-2022

Signed By : Test, Staff 01-18-2023 5:32 PM

Approved By : Baxter, Suzanne 01-25-2023 6:00 PM

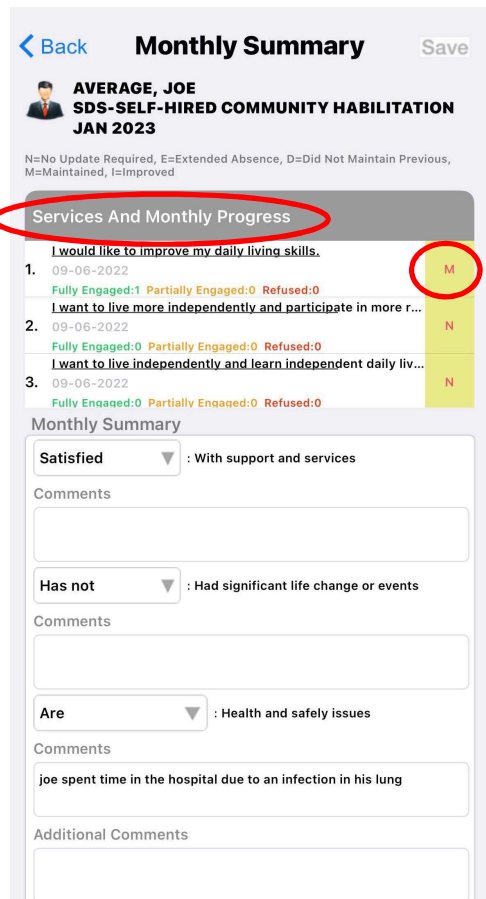
Dec 2022

Plan Effective Date : 09-06-2022

Signed By : Test, Staff 01-18-2023 5:32 PM

Approved By : Baxter, Suzanne 01-25-2023 6:00 PM

4. Select 'Services and Monthly Progress' (yellow box) to open 'Service Summary' page



Monthly Summary

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

N=No Update Required, E=Extended Absence, D=Did Not Maintain Previous, M=Maintained, I=Improved

Services And Monthly Progress

I would like to improve my daily living skills.

1. 09-06-2022 M

Fully Engaged:1 Partially Engaged:0 Refused:0

I want to live more independently and participate in more r...

2. 09-06-2022 N

Fully Engaged:0 Partially Engaged:0 Refused:0

I want to live independently and learn independent daily liv...

3. 09-06-2022 N

Fully Engaged:0 Partially Engaged:0 Refused:0

Monthly Summary

Satisfied : With support and services

Comments

Has not : Had significant life change or events

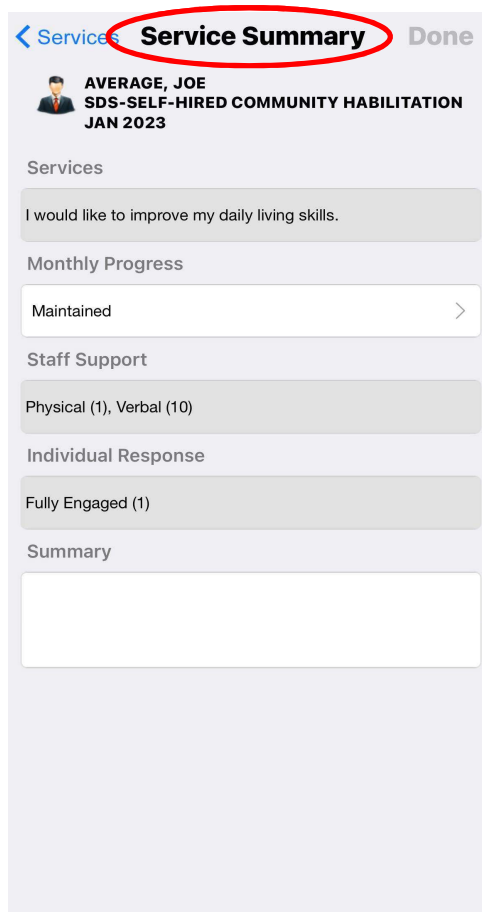
Comments

Are : Health and safety issues

Comments

joe spent time in the hospital due to an infection in his lung

Additional Comments



Service Summary

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

Services

I would like to improve my daily living skills.

Monthly Progress

Maintained

Staff Support

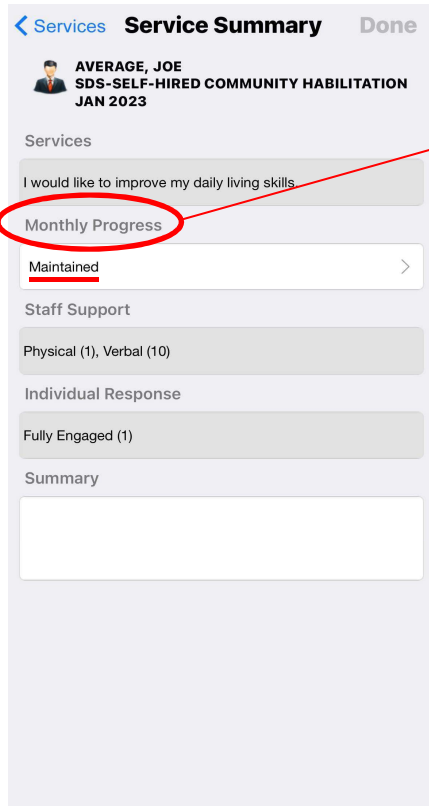
Physical (1), Verbal (10)

Individual Response

Fully Engaged (1)

Summary

5. Select 'Monthly Progress' (grey arrow)



Services **Service Summary** **Done**

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

Services

I would like to improve my daily living skills

Monthly Progress

Maintained

Staff Support

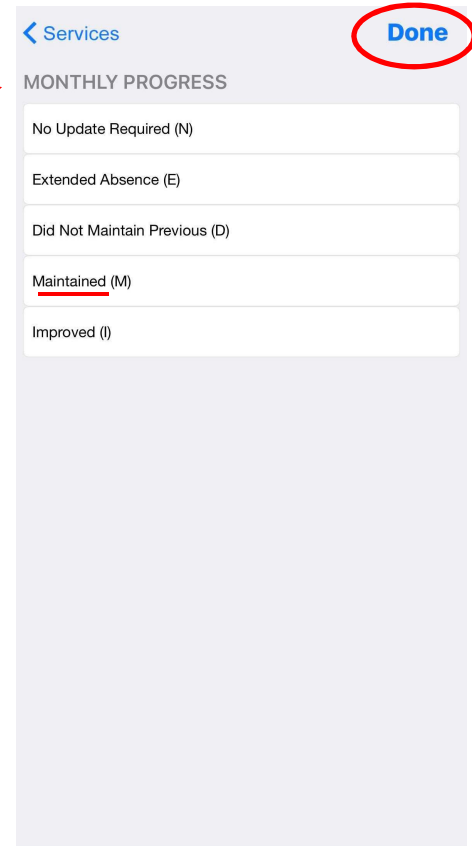
Physical (1), Verbal (10)

Individual Response

Fully Engaged (1)

Summary

6. Select update from dropdown and select 'done'



< Services **Done**

MONTHLY PROGRESS

No Update Required (N)

Extended Absence (E)

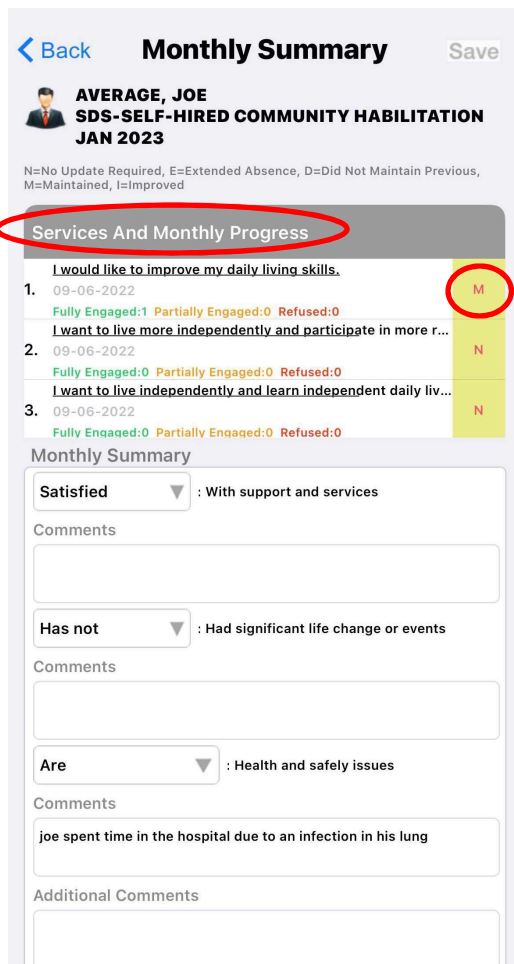
Did Not Maintain Previous (D)

Maintained (M)

Improved (I)

7. Under 'Monthly Summary' complete the 3 dropdowns (comments optional)

- Supports and Services
- Had a significant life change or events
- Health and safety issues



< Back **Monthly Summary** **Save**

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

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Services And Monthly Progress

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I want to live more independently and participate in more r...

2. 09-06-2022 **N**

Fully Engaged:0 Partially Engaged:0 Refused:0

I want to live independently and learn independent daily liv...

3. 09-06-2022 **N**

Fully Engaged:0 Partially Engaged:0 Refused:0

Monthly Summary

Satisfied : With support and services

Comments

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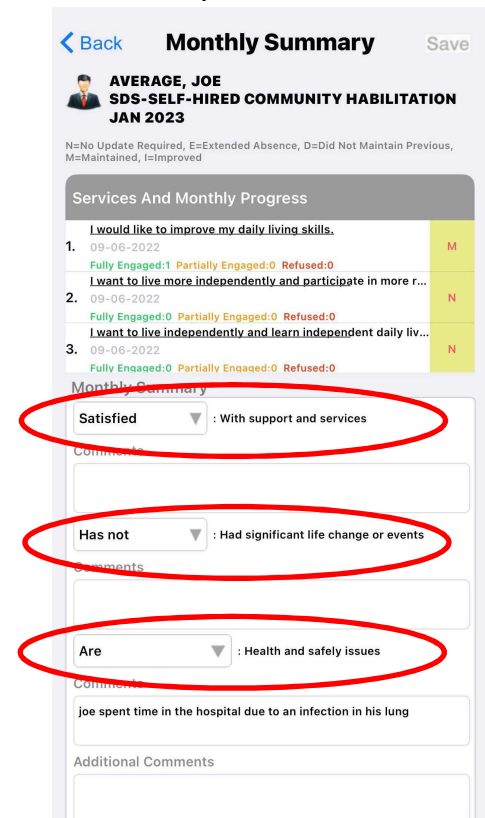
Comments

Are : Health and safety issues

Comments

joe spent time in the hospital due to an infection in his lung

Additional Comments



< Back **Monthly Summary** **Save**

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SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

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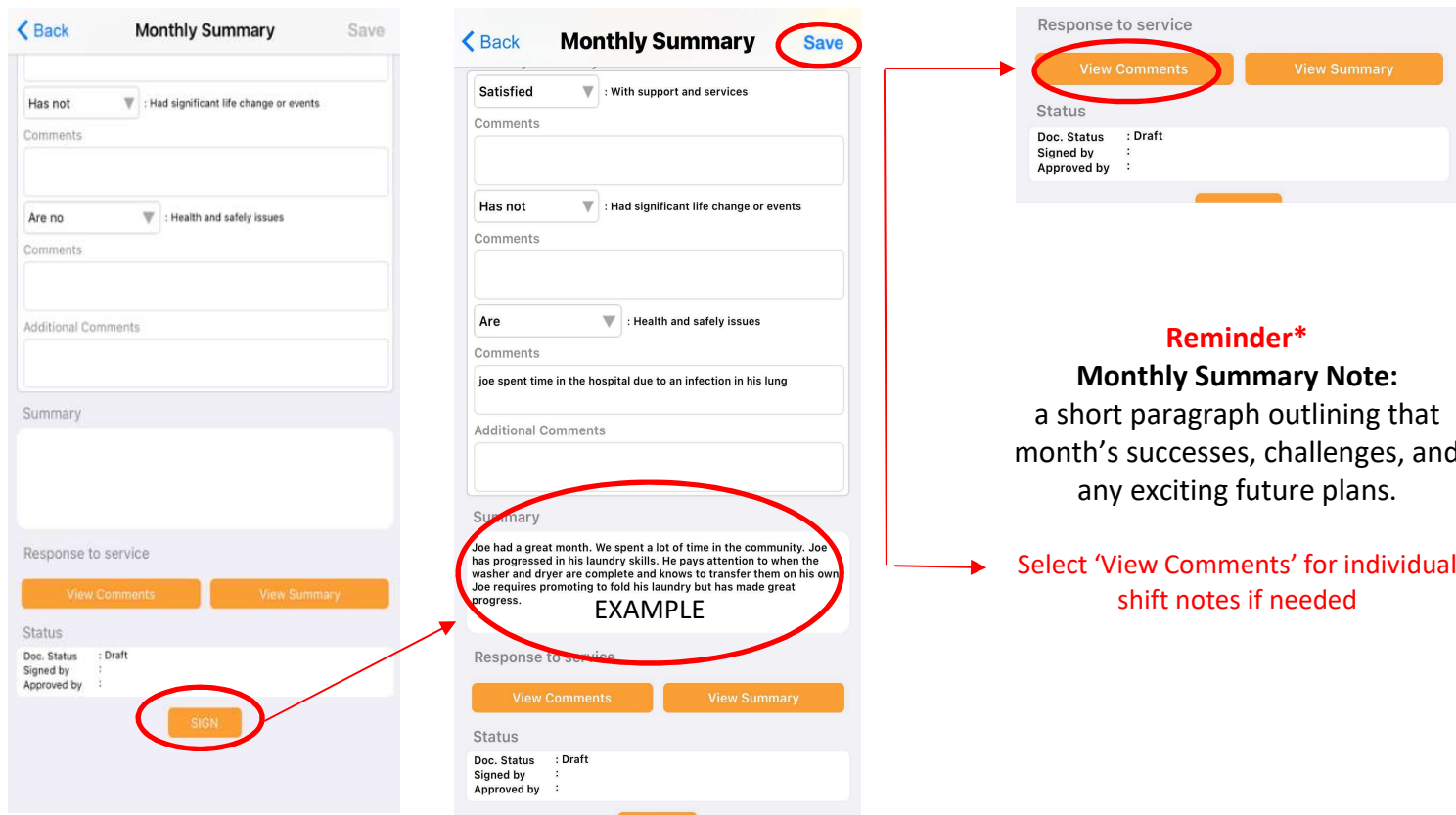
Are : Health and safety issues

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Additional Comments

8. Add monthly notes in the textbox labeled 'summary' and select 'save'



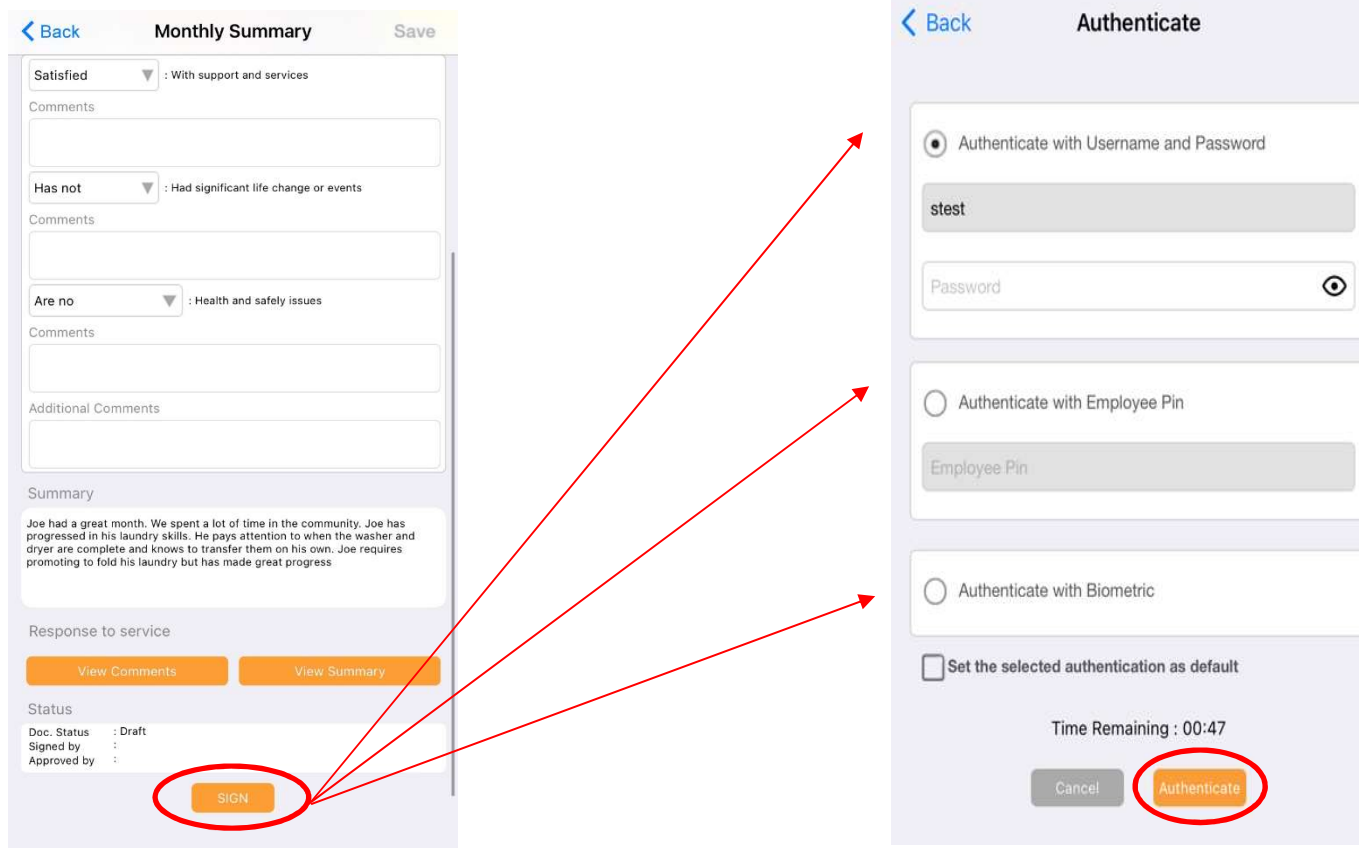
The first screenshot shows the 'Monthly Summary' form with a 'SIGN' button circled in orange at the bottom. The second screenshot shows the 'Save' button circled in orange at the top right, and an example of a summary note: 'Joe had a great month. We spent a lot of time in the community. Joe has progressed in his laundry skills. He pays attention to when the washer and dryer are complete and knows to transfer them on his own. Joe requires promoting to fold his laundry but has made great progress.' The third screenshot shows the 'View Comments' button circled in orange, with a red arrow pointing to it from the 'View Comments' button in the second screenshot.

Reminder*
Monthly Summary Note:
a short paragraph outlining that month's successes, challenges, and any exciting future plans.

Select 'View Comments' for individual shift notes if needed

7. Select 'Sign' at the bottom (indicated by orange button)

8. Select 'Authenticate' using 1 of the 3 options below (indicated by orange button)



The first screenshot shows the 'Monthly Summary' form with the 'SIGN' button circled in orange at the bottom. The second screenshot shows the 'Authenticate' screen with three authentication options: 'Authenticate with Username and Password', 'Authenticate with Employee Pin', and 'Authenticate with Biometric'. The 'Authenticate' button is circled in orange at the bottom right.

Please Note:

- Approval signatures will come from the team's SD Coordinator after the month has been completed and signed off by staff
- Staff cannot sign monthly summaries ahead of time but can save notes throughout the month—monthly summaries can only be signed once the month has been completed
- If corrections are needed reach out to your team's SD Coordinator to unlock document for editing