

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.

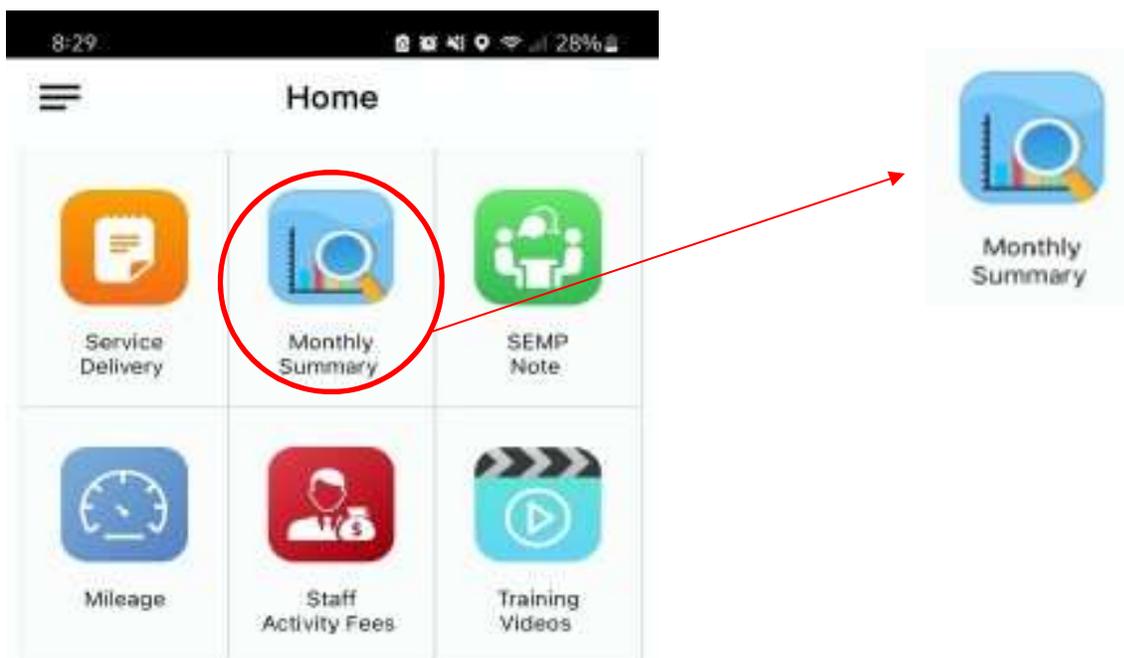
*eVeroMobile app- app utilized by staff to document services when providing NYS Medicaid supports

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

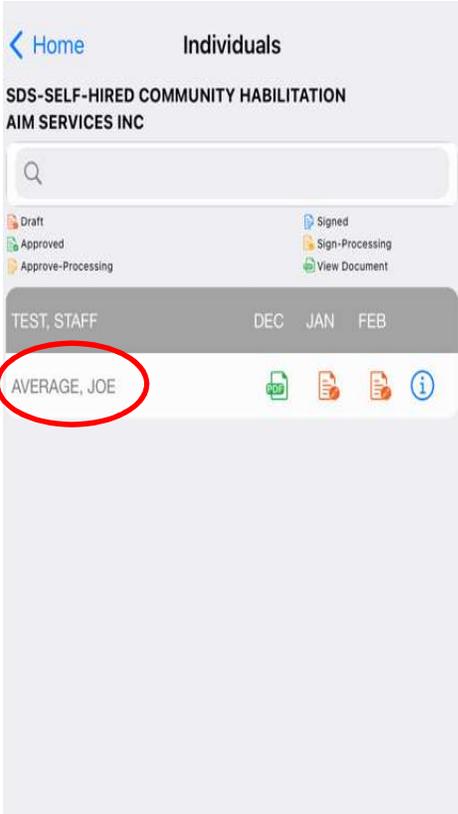
Example of a monthly summary note:

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.

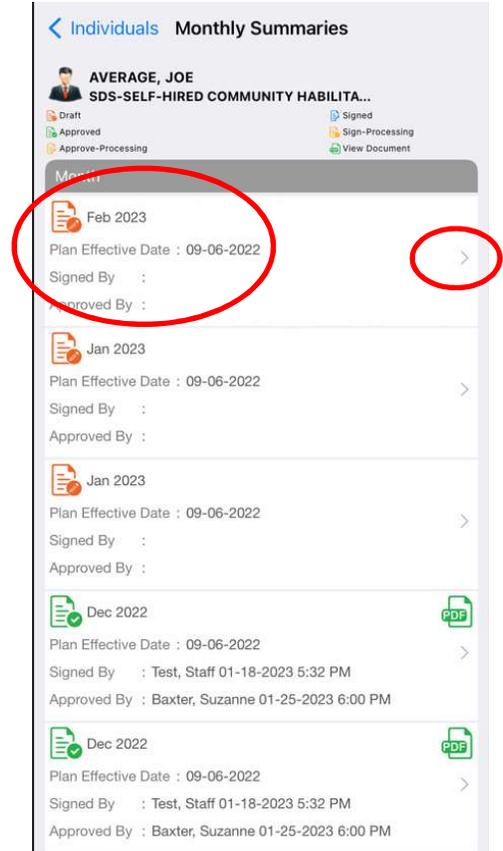
1. Log into the eVero application and select the blue 'Monthly Summary' tile.



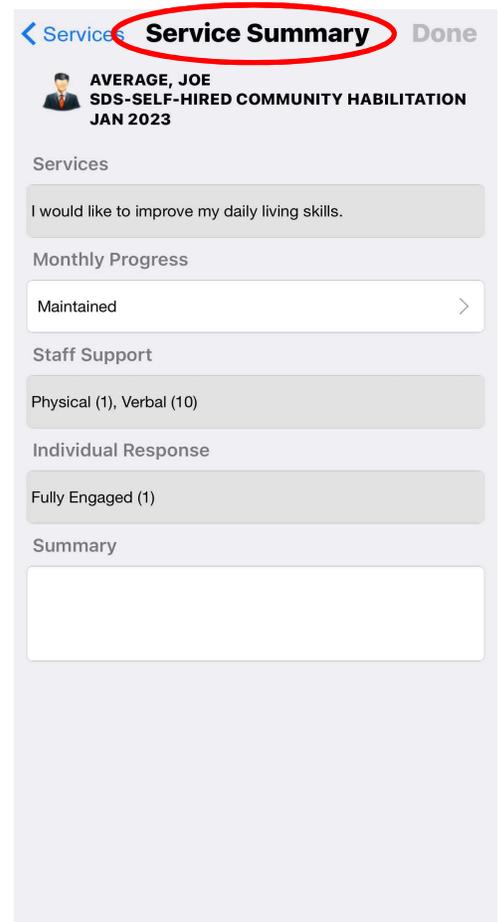
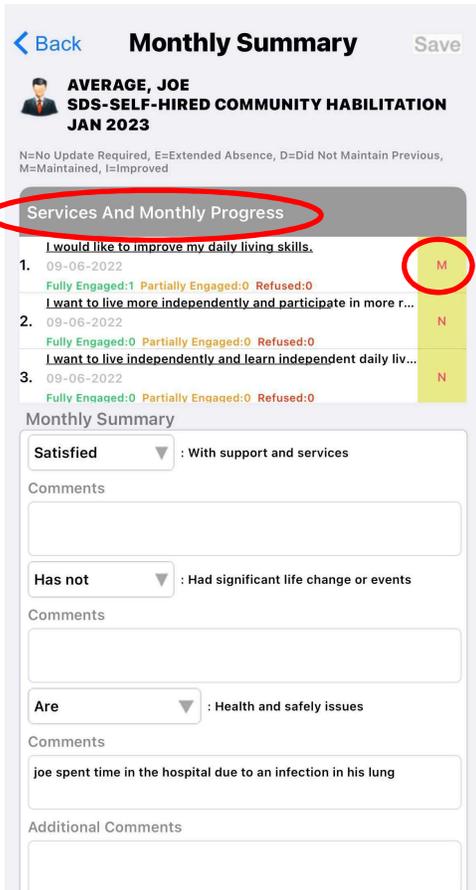
2. Select the individual's name



3. Select the month being completed (grey arrow)



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



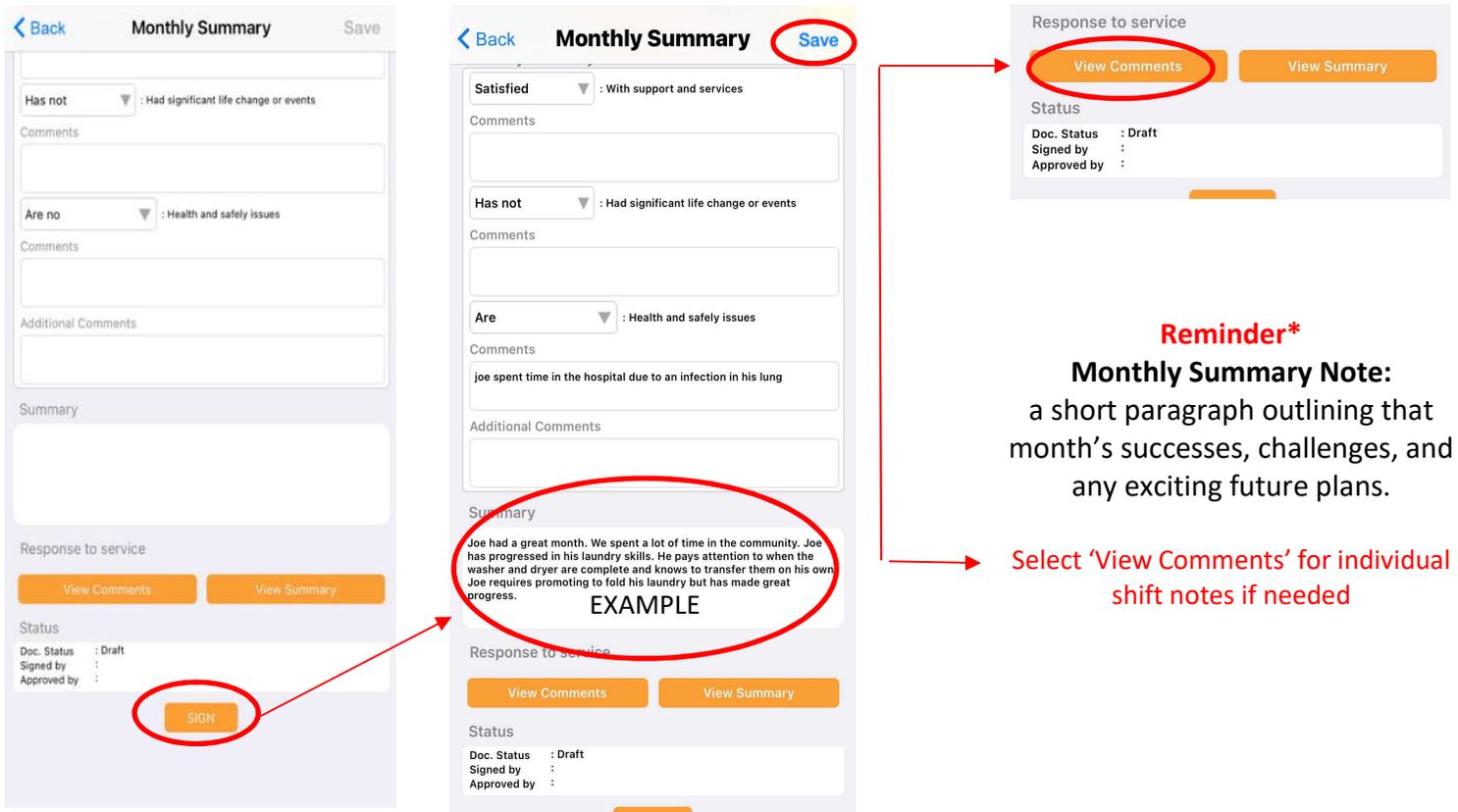
5. Select 'Monthly Progress' (grey arrow)

6. Select update from dropdown and select 'done'

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

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

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

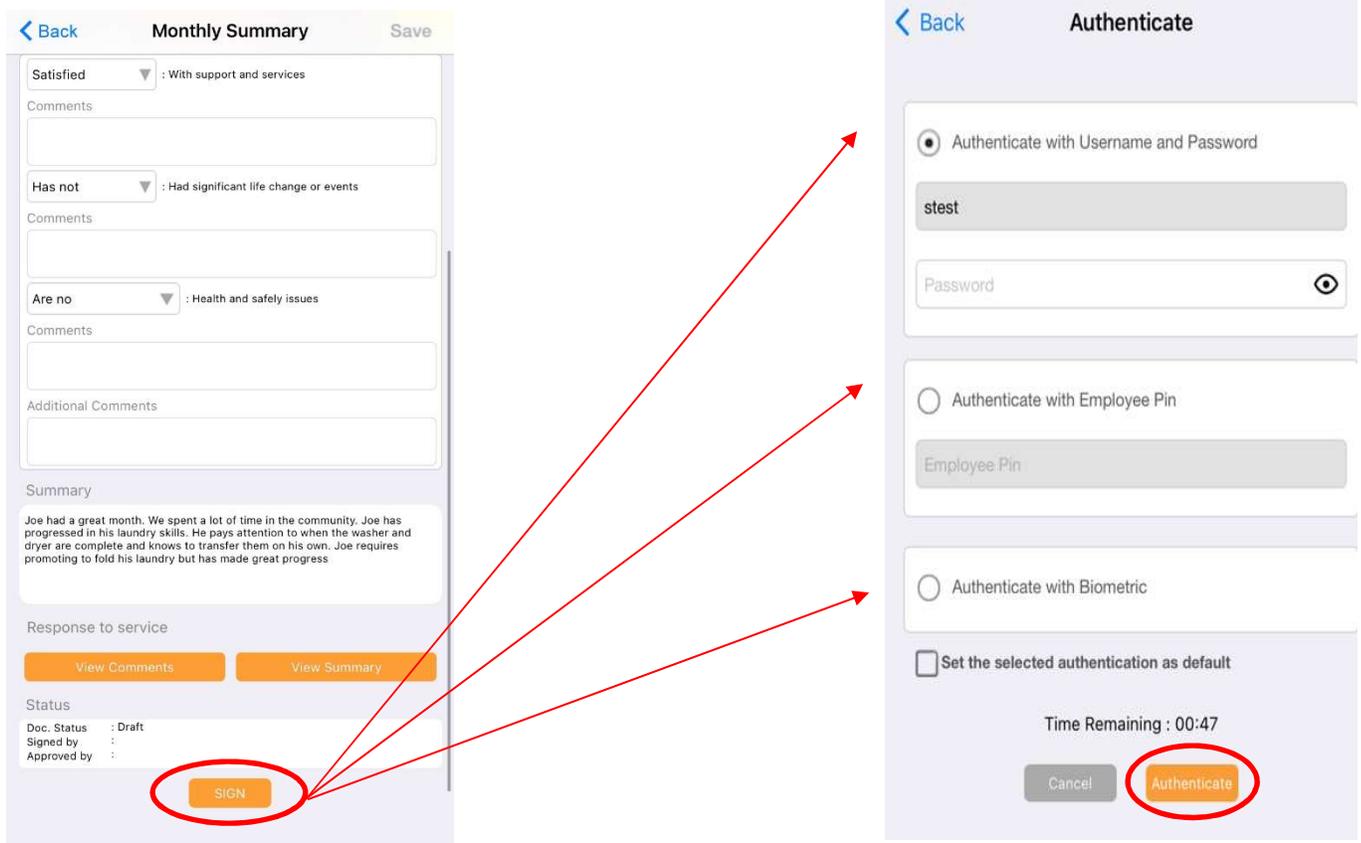


Reminder*
Monthly Summary Note:
a short paragraph outlining that month's successes, challenges, and any exciting future plans.

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)



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