Entering a Monthly Summary for Self-Hired Com Hab

eVeroMobile App

Community Habilitation a service delivered in the community to facilitate inclusion, integration, skill and relationship building

Monthly Summary is a Medicaid required document that is encompassed in a Self-Hired Community Habilitation staff's responsibility

- Quality Documentation: the monthly summary should be a short paragraph outlining that month's successes, challenges, and any exciting future plans of the self-directed person

eVeroMobile app software app utilized by self-hired staff to document services when providing NYS Medicaid supports including but not limited to timekeeping, shift notes, and monthly documentation of staff services provided

- On-Demand 'How to' eVero Videos Link: https://www.youtube.com/@aimservicesinc/playlists

Quality Notes staff will enter daily shift notes when providing Community Habilitation services. Notes should include important details of the supports provided during that shift. This should directly relate to the individual's goals/valued outcomes as indicated in the staff action plan

- Daily shift notes are encompassed in monthly summary documentation and used to outline overall progress of the self-directed person ultimately building on valued outcomes over time

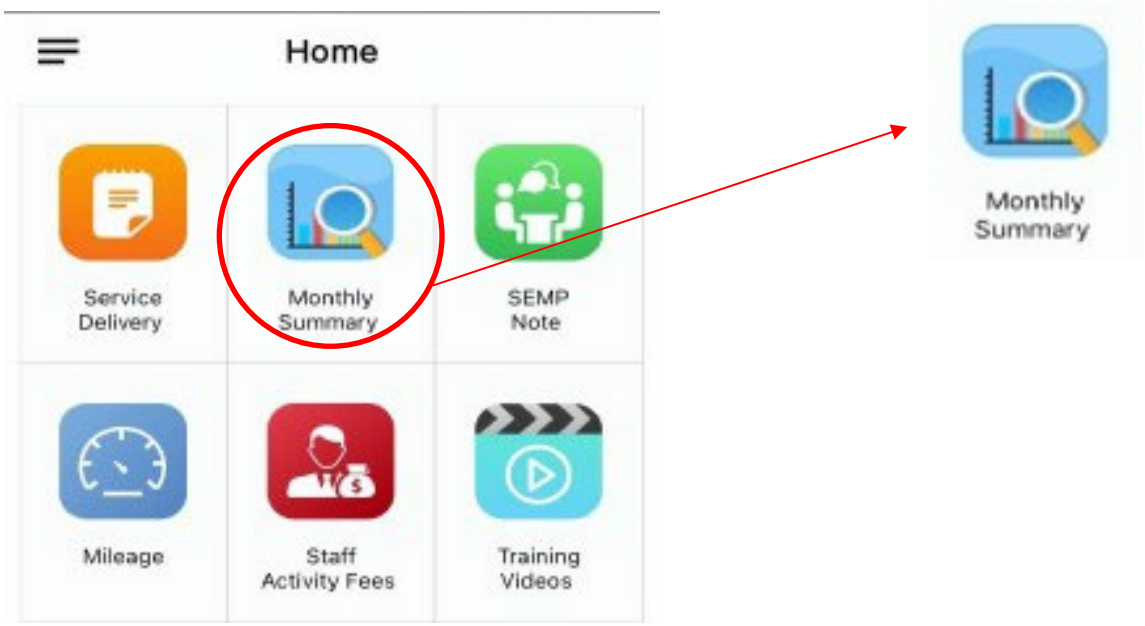
Monthly Summary Timeline of Completion:

- Self-Hired staff will be expected to complete all documentation and sign off to maintain com hab responsibilities
- Monthly Summaries are due by the first week of the month for the previous month
    - Example: April Monthly Summary due by the first week of May
- Staff are only able to sign documentation once the month is completed (1st of the month)
- AIM routinely communicates timeline of completion and supports via Self-Direction Coordinator and eVero Announcements in the mobile app

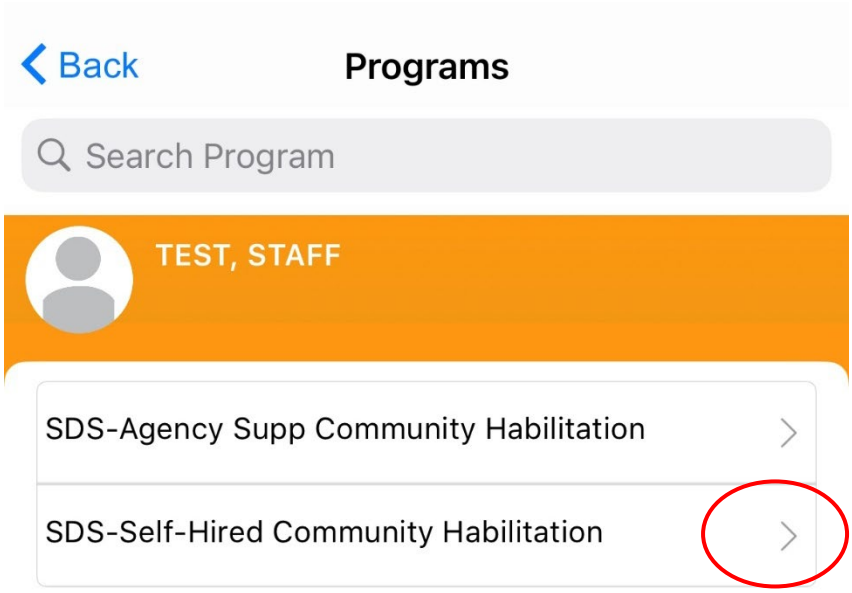
Example Monthly Summary Note:

Joe had a great month. We spent a lot of time in the community. We were successful in scheduling a few basketball games with friends. Joe and I went to the movies to see a comedy and worked on some budgeting skills while out making purchases. Joe and I had a busy few weeks with the nice weather and plan to work on more community opportunities next month. Joe has been talking about volunteering at the local pet shelter, so we plan on doing research on this together! Joe has also progressed in his independent skills throughout our time together particularly with laundry skills. He pays attention to when the washer and dryer are complete and knows to transfer clothing on his own. Joe requires prompting to fold his laundry but has made great progress. Joe and I had a great month overall and have made plans for volunteering with animals and starting a new cooking class next month because Joe wants to expand his knowledge in healthy choices and meal prep.

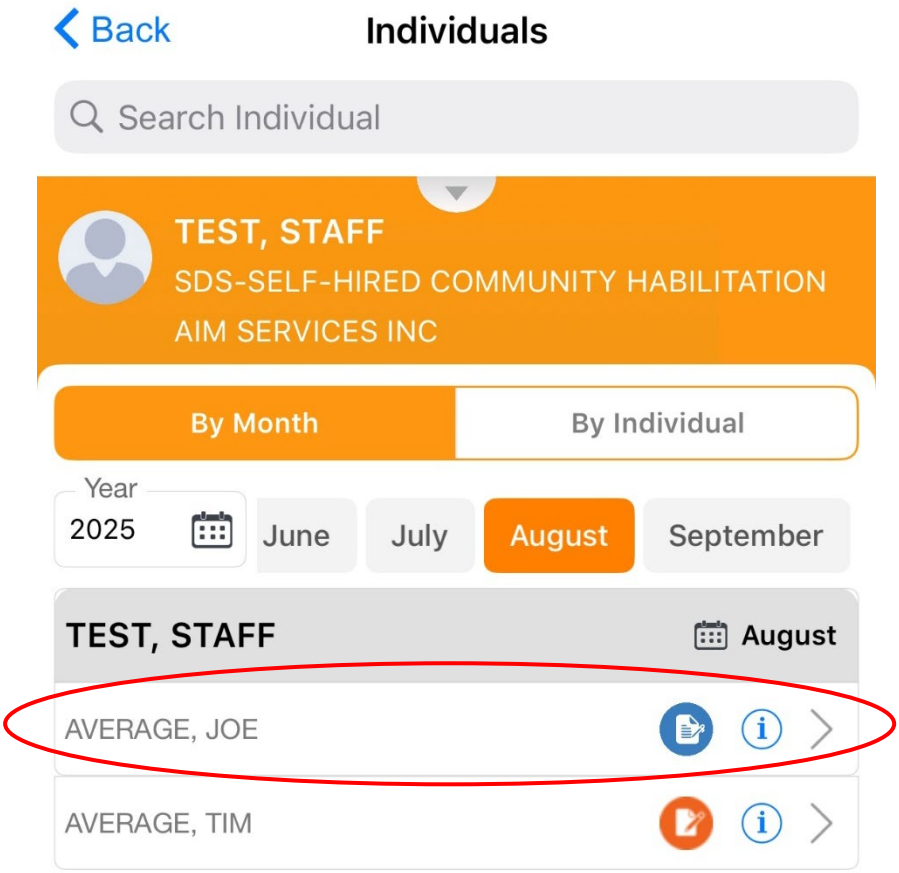
1. Log into the eVero application and select the blue ‘Monthly Summary’ tile.



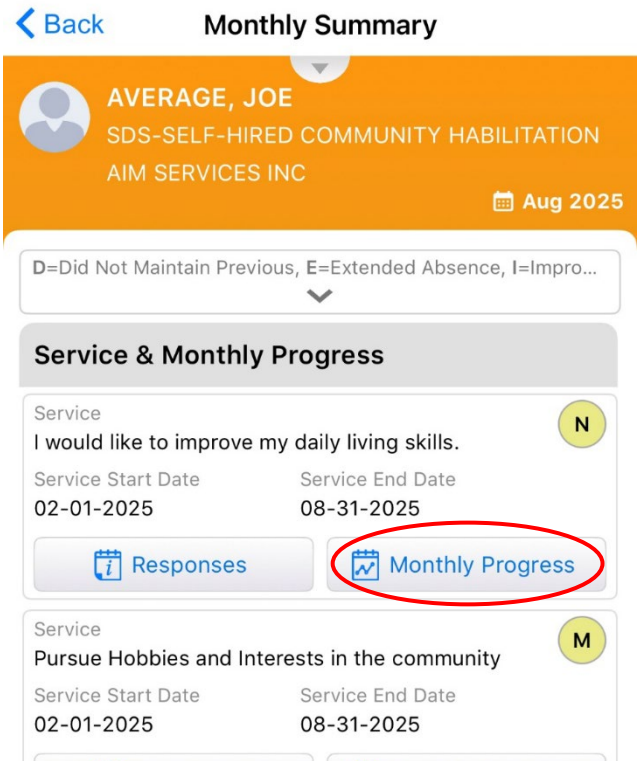
2. Select program as ‘Self-Hired Community Habilitation’ to access monthly summaries



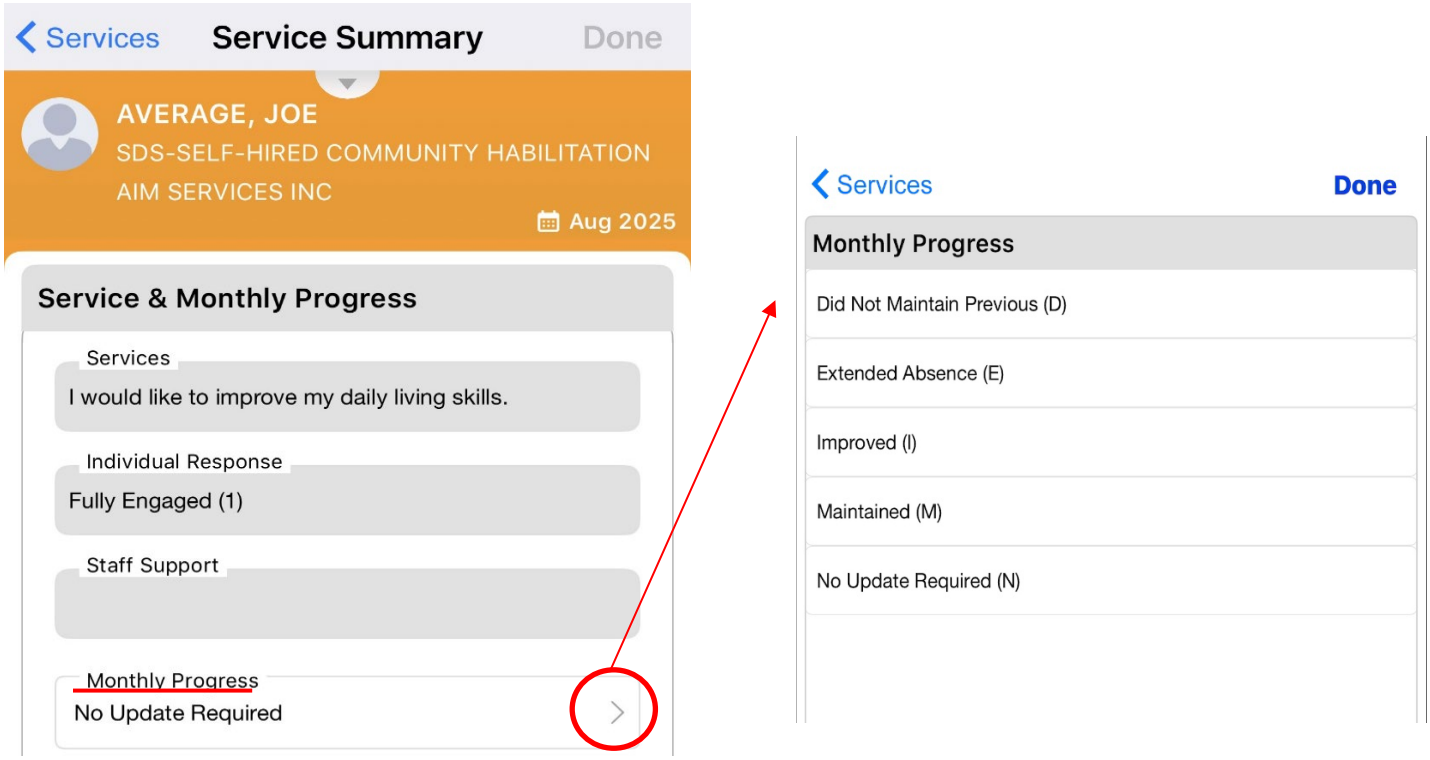
3. Filter ‘By Month’ to select the desired month
4. Select the name of the person whose monthly summary you wish to complete



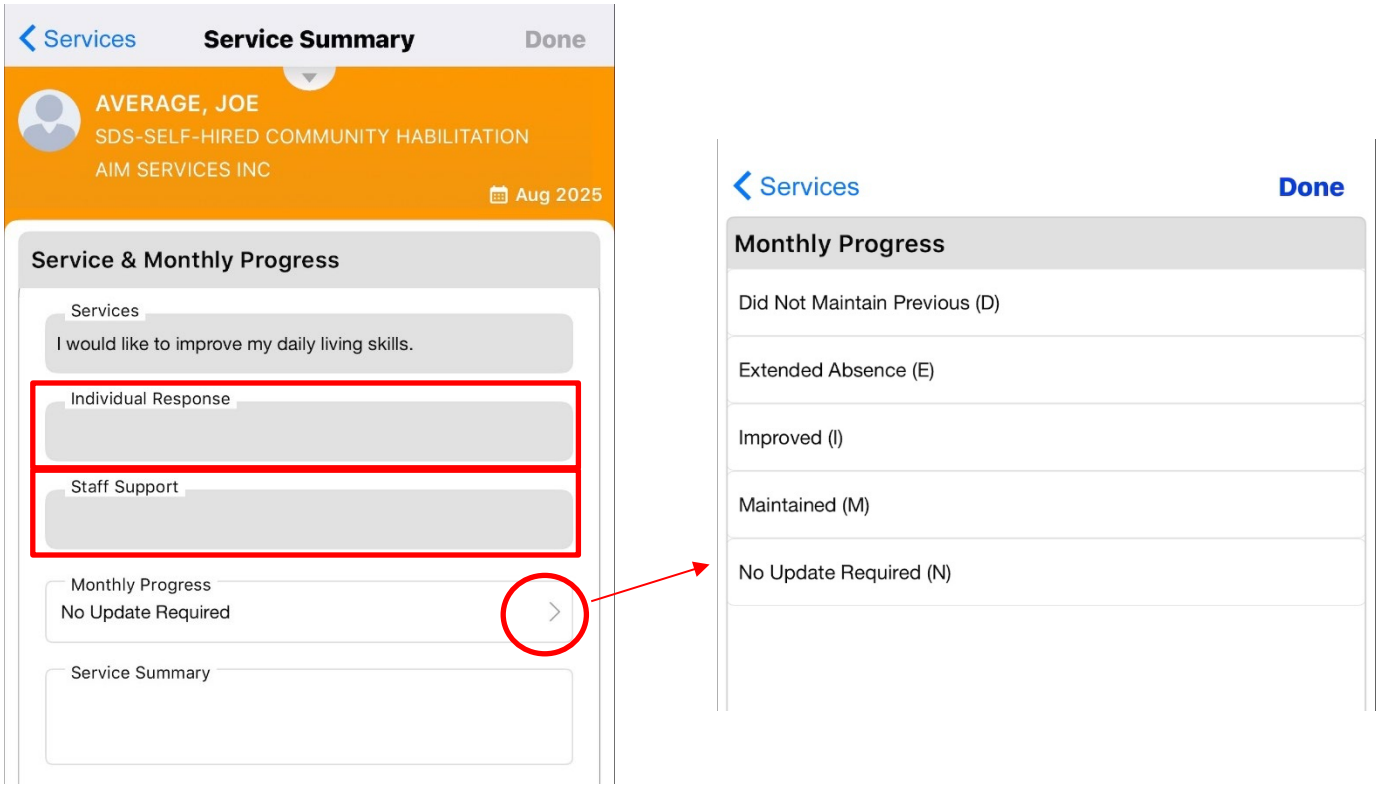
5. Select ‘Monthly Progress’ on bottom righthand side of individual service goals



6. Select the ‘Monthly Progress’ dropdown, when a goal was worked on, and select appropriate response

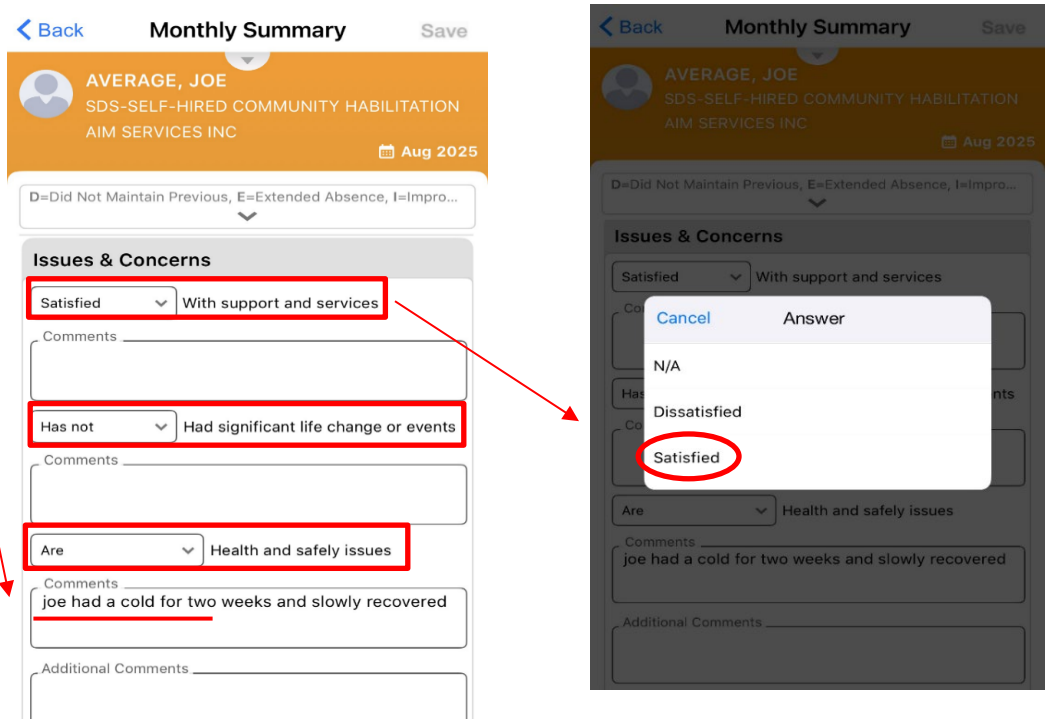


Note: if a goal was not worked on during the month ‘No Update Required’ will be selected due to no response listed in ‘Individual Response’ or ‘Staff Support’ sections

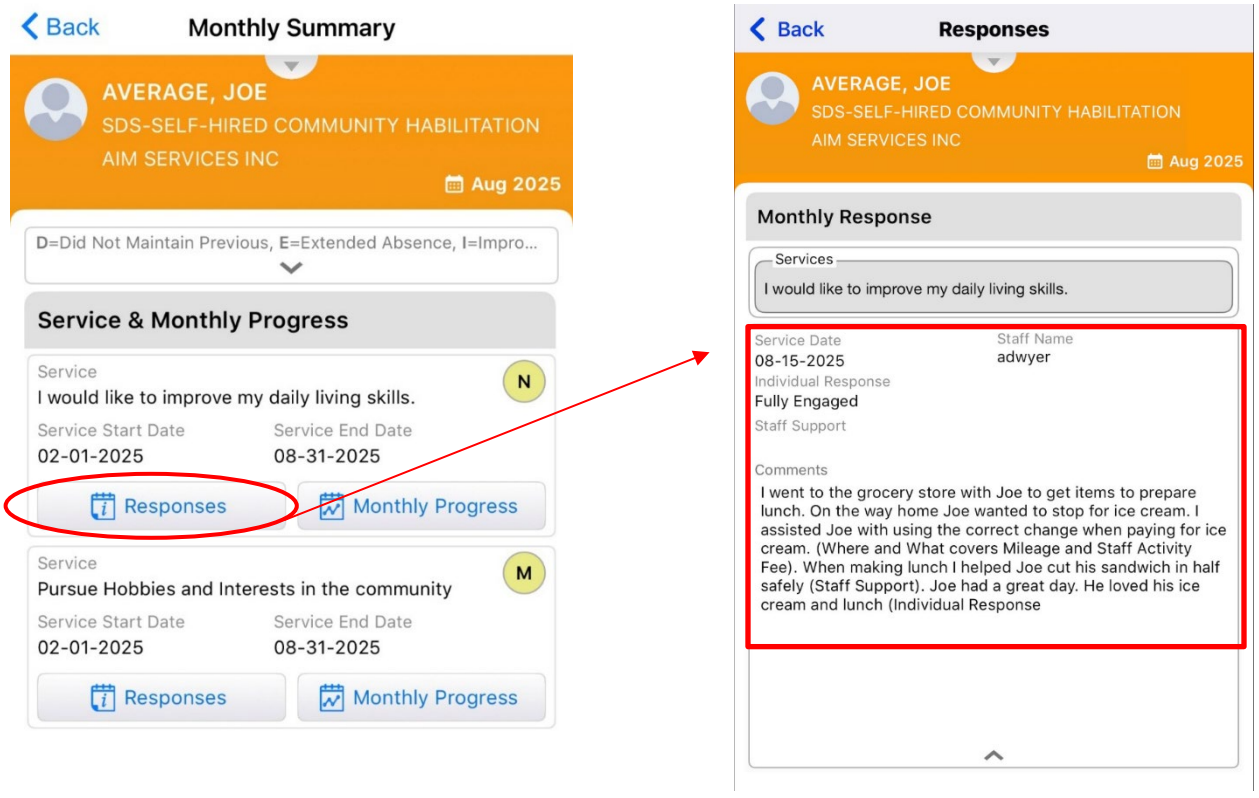


8. Under ‘Issues and Concerns’ complete the 3 dropdowns (comments optional)
    a. Supports and Services
    b. Had a significant life change or events
    c. Health and safety issues

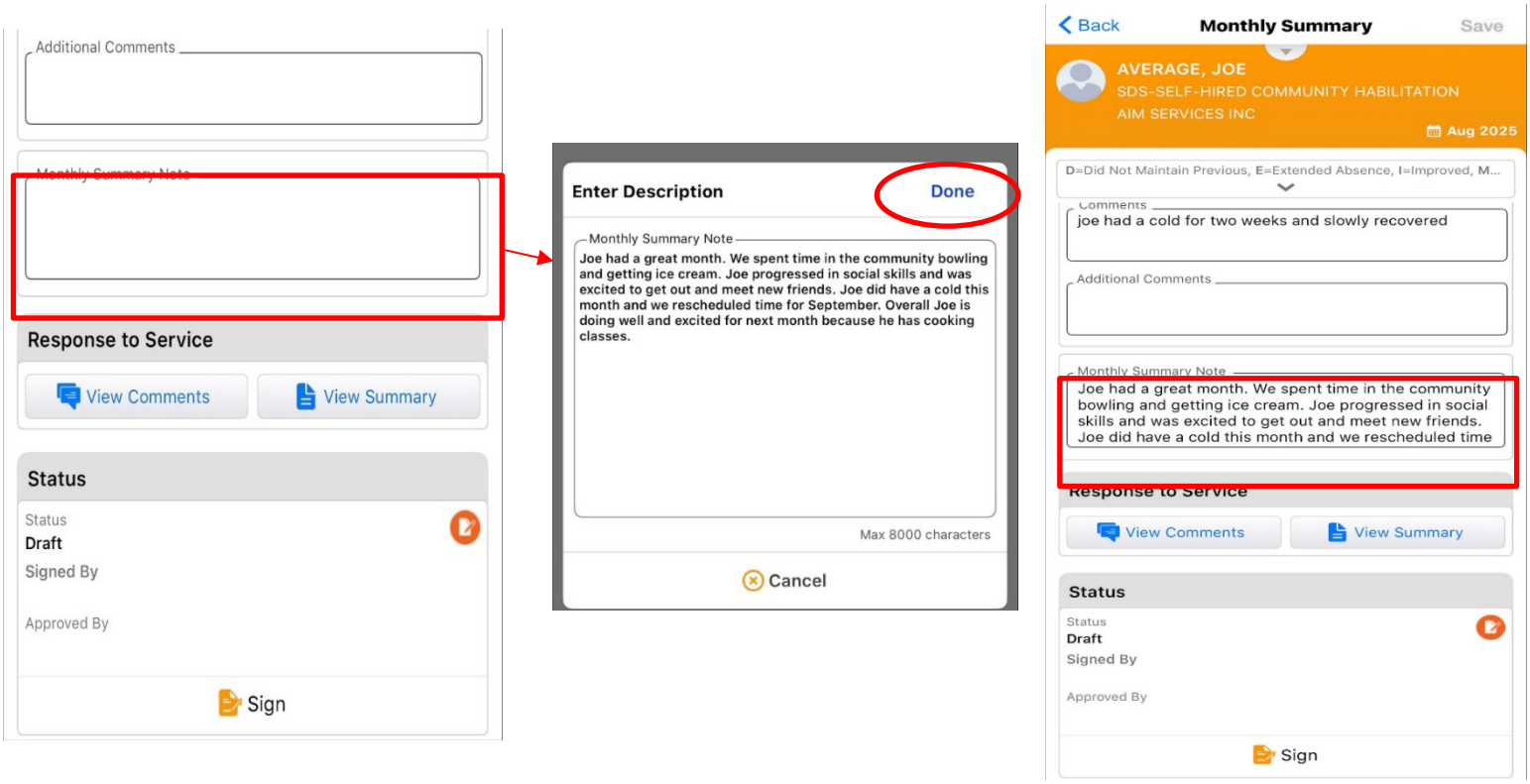
Note: Comments are encouraged if there is significant detail to support the answer selected supporting quality documentation for future team planning



9. To assist in authoring monthly summary notes users can select ‘Responses’ on the lefthand side of each service goal to expand daily shift notes for each goal supporting quality documentation



10. User will add monthly note in the free textbox labeled ‘Monthly Summary Note’ and select ‘Done’

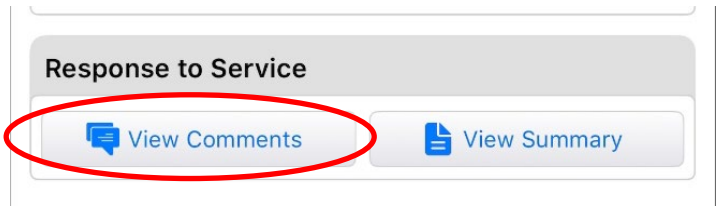


Reminder*

Monthly Summary Note:

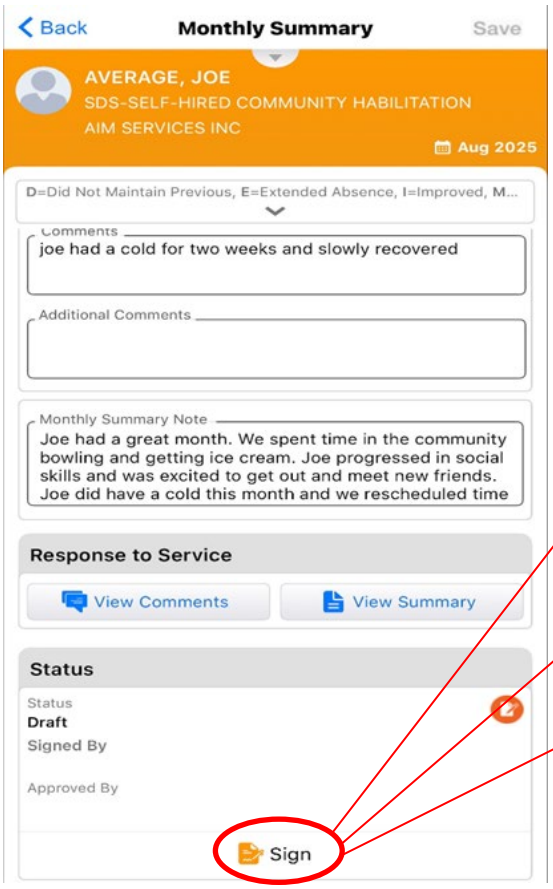
a short paragraph outlining that month’s successes, challenges, and any exciting future plans.

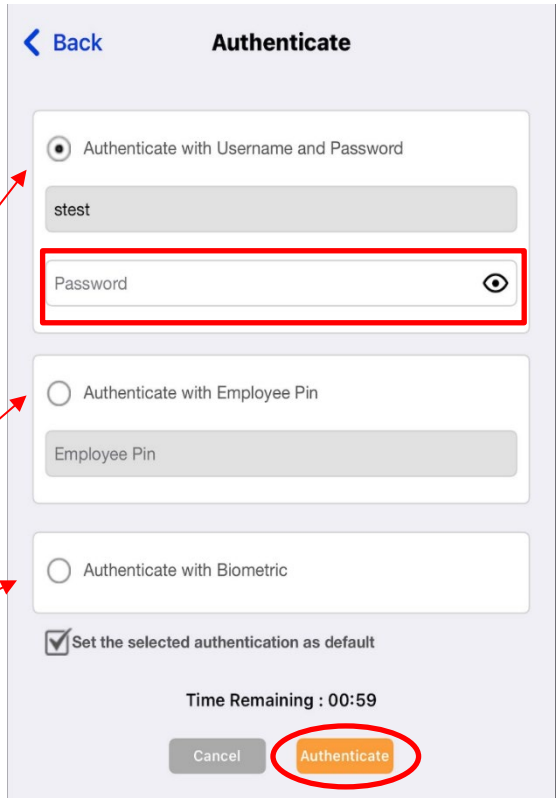
Select ‘View Comments’ for individual shift notes if needed



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

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





Review and Approval of Monthly Summaries:

- Review and approval of monthly summaries will be completed by 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 (1st of the month)
    - Example: April Monthly Summary due by the first week of May
- If corrections are needed reach out to your team's SD Coordinator to unlock document for editing
- If a monthly summary is rejected due to missing information staff can edit the document and resign to satisfy responsibilities (within a reasonable timeframe)