

# Entering a Monthly Summary SEMP eVeroMobile App

**\*Monthly Summary-** is a Medicaid required document encompassed in a Self-Hired Supported Employment staff's responsibility. The monthly summary narrative should include:

- the implementation of the individual's SEMP Hab Plan for the month
- a description of the individual's vocational progress
- a description of some of the actions of staff to address vocational challenges
- a description of the individual's response
- any issues or concerns

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

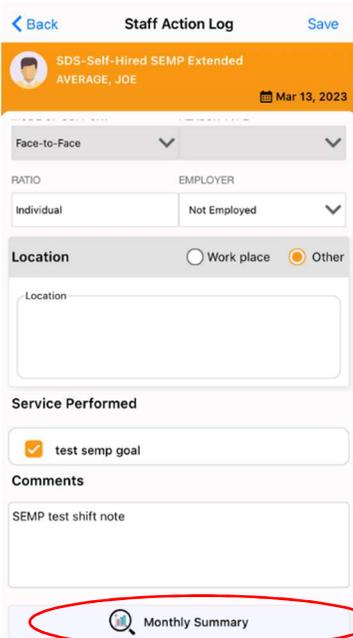
**Monthly Summary due within the first week of the month – as communicated by Self-Directed team and eVero Communication**

Example of a monthly summary note:

This month Joe and I spent time practicing interviewing for a job. Joe has made great progress this month by completing his resume. Joe did require some assistance with looking for applications. I assisted Joe with filling out applications for jobs he was interested in. Joe has been engaged and excited this month about getting closer to his goal. Joe is concerned on how he will be getting to work once he has a job. Next month Joe and I will discuss a travel plan to and from work.

**\*Entering During Shift:**

1. Select 'Monthly Summary' at the bottom of the 'Staff Action Log' screen
2. Under 'Summary' select the month to be completed



Staff Action Log

SDS-Self-Hired SEMP Extended  
AVERAGE, JOE  
Mar 13, 2023

Face-to-Face

RATIO: Individual  
EMPLOYER: Not Employed

Location:  Work place  Other

Service Performed:  test semp goal

Comments: SEMP test shift note

**Monthly Summary**



Staff Action Log Summary

SDS-Self-Hired SEMP Extended  
AVERAGE, JOE

<b>Mar</b>	Draft	: 1	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Feb</b>	Draft	: 1	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Jan</b>	Draft	: 0	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Dec</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Nov</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Oct</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Sep</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		

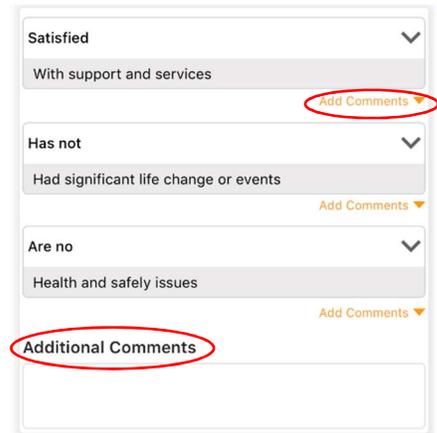
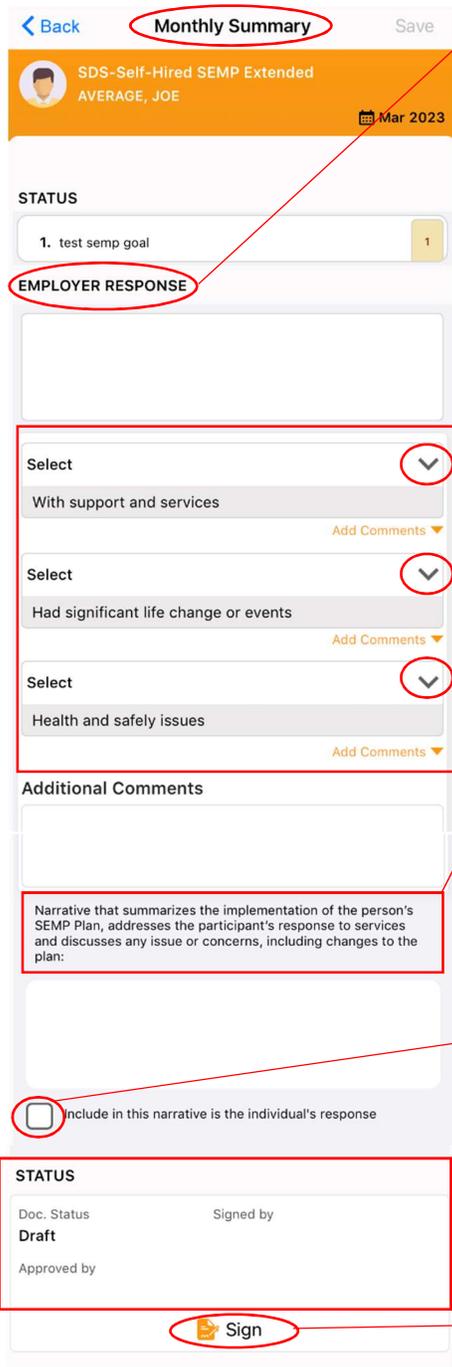
**Note:** review explanations on how to complete each section

3. Under “Monthly Summary” the following will show: **Goal Status, Employer Response, Satisfaction, Narrative and Individual Response, Document Status, and Signature**

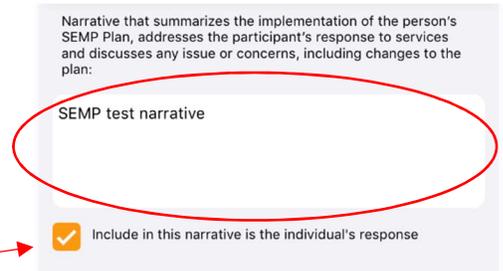
**Employer Response:** enter employer note for the selected month



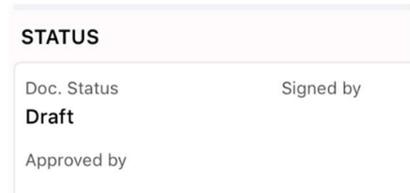
**Satisfaction:** select from dropdown menu; add additional comments if necessary

**Narrative and Individual Response:** include individual’s overall response for the month (selection indicated by **orange checkmark**), a SEMP goal for the month, description of the individual’s vocational progress, actions steps taken by staff to address challenges, or any issues/concerns

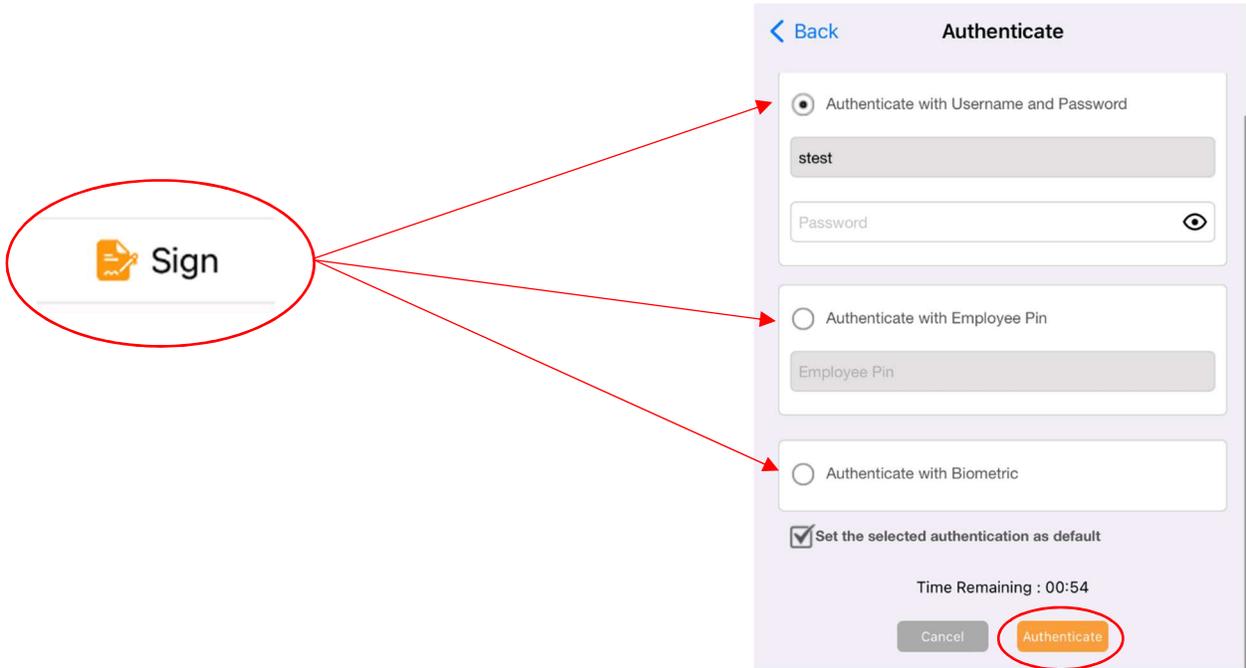


**Document Status:** in draft, signed, or approved

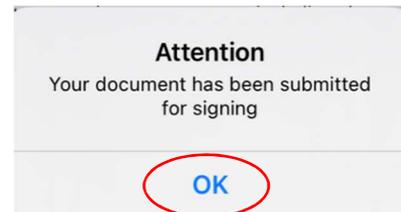
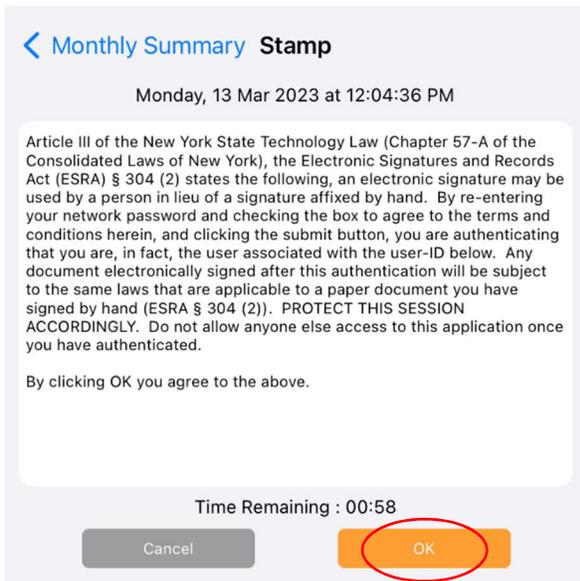


**Signature:** determines document status; Staff will sign draft when ready and SD Coordinator will sign to approve once the month has been completed

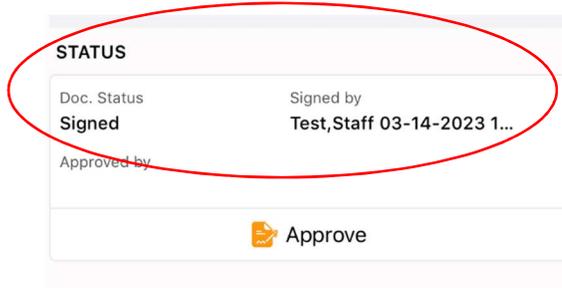
4. Select 'Sign' button (indicated by orange notepad; bottom of 'Monthly Summary' screen)
5. Select 'Authenticate' using 1 of 3 options below (indicated by orange button)



6. Select 'OK' to add signature stamp (indicated by an orange button)
7. Attention screen indicates document has been submitted for signing; Select 'OK'

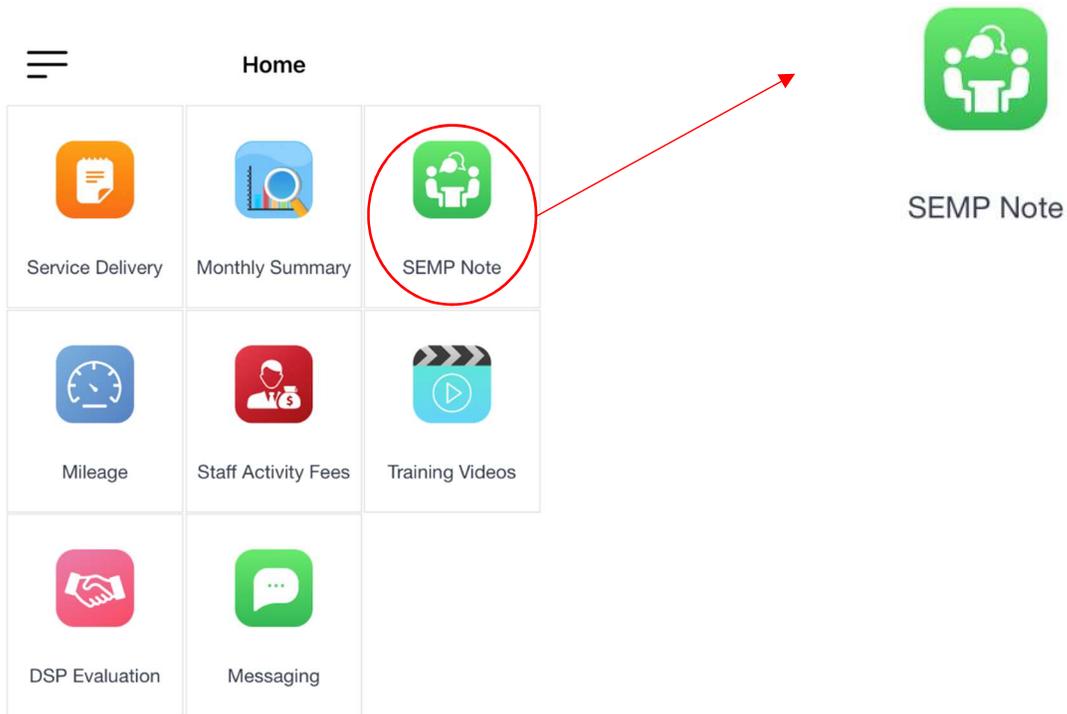


- Once signed status will show as 'Signed' with a stamp of signature from staff, date, and time

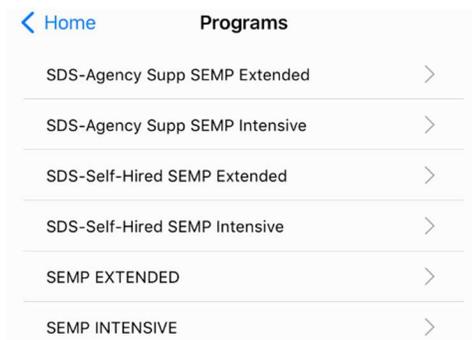


\*Entering after the month has been completed:

- Select 'SEMP Note' to enter monthly summary



- Select Program to enter 'SEMP Note Summary' screen



3. Select the month to be completed
4. Select individual by clicking their name

< Programs SEMP Note Summary

SDS-Self-Hired SEMP Extended

TEST, STAFF

<b>Mar</b>	Draft	: 1	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Feb</b>	Draft	: 1	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Jan</b>	Draft	: 1	Approved	: 0
<b>2023</b>	Signed	: 0		
<b>Dec</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Nov</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Oct</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		
<b>Sep</b>	Draft	: 0	Approved	: 0
<b>2022</b>	Signed	: 0		

< Back Individuals

SDS-Self-Hired SEMP Extended  
TEST, STAFF

Feb 2023

Search

TEST, STAFF

AVERAGE, JOE

5. Under 'SEMP Notes' select 'Monthly Summary' (grey arrow right-hand side of screen)
6. Complete all fields under 'Monthly Summary' screen

< Individuals SEMP Notes

SDS-Self-Hired SEMP Extended  
AVERAGE, JOE

Feb 2023

Employed ?

**Monthly Summary**

Document Status Signed by

**Draft**

Approved by

Staff Action Log

< Back Monthly Summary Save

SDS-Self-Hired SEMP Extended  
AVERAGE, JOE

FEB 2023

STATUS

1. test semp goal 5

EMPLOYER RESPONSE

Satisfied

With support and services

Add Comments

Has not

Had significant life change or events

Add Comments

Are no

Health and safety issues

Add Comments

Additional Comments

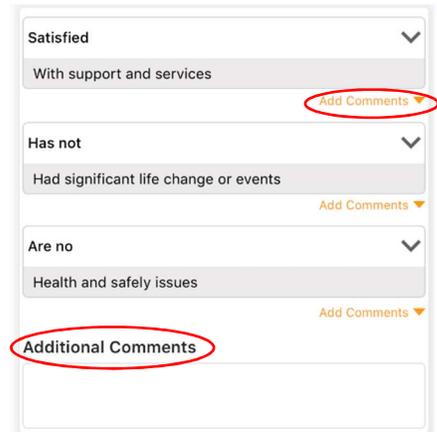
**Note:** review explanations on how to complete each section

3. Under “Monthly Summary” the following will show: **Goal Status, Employer Response, Satisfaction, Narrative and Individual Response, Document Status, and Signature**

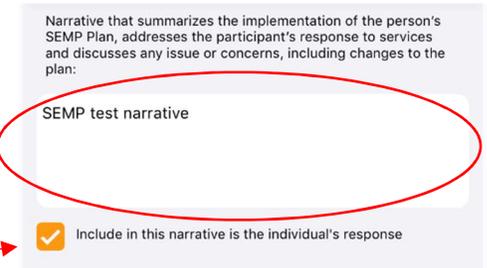
**Employer Response:** enter employer note for the selected month



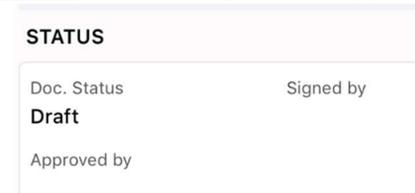
**Satisfaction:** select from dropdown menu; add additional comments if necessary



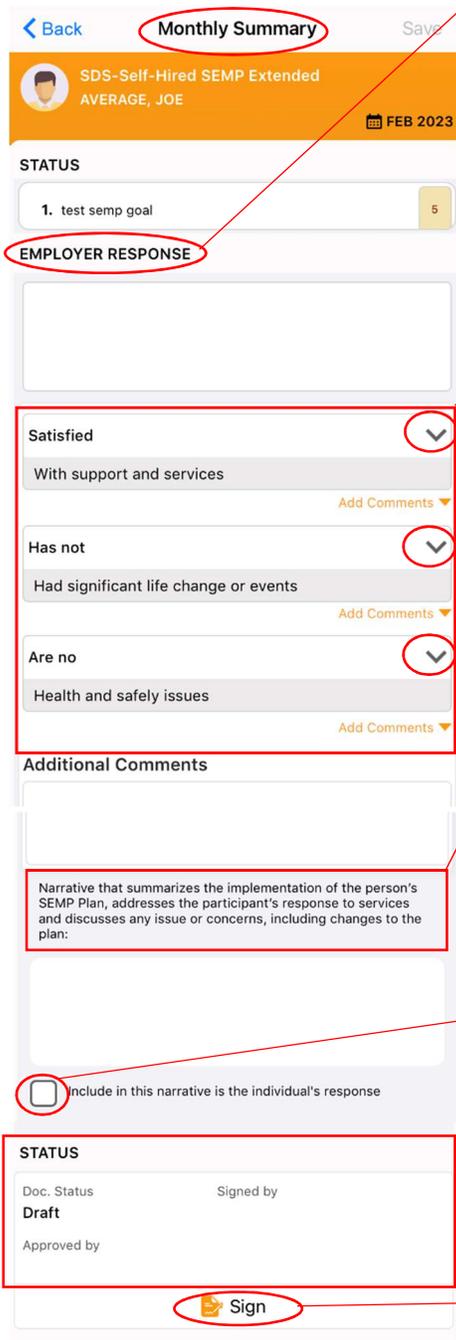
**Narrative and Individual Response:** include individual’s overall response for the month (selection indicated by **orange checkmark**), a SEMP goal for the month, description of the individual’s vocational progress, actions steps taken by staff to address challenges, or any issues/concerns



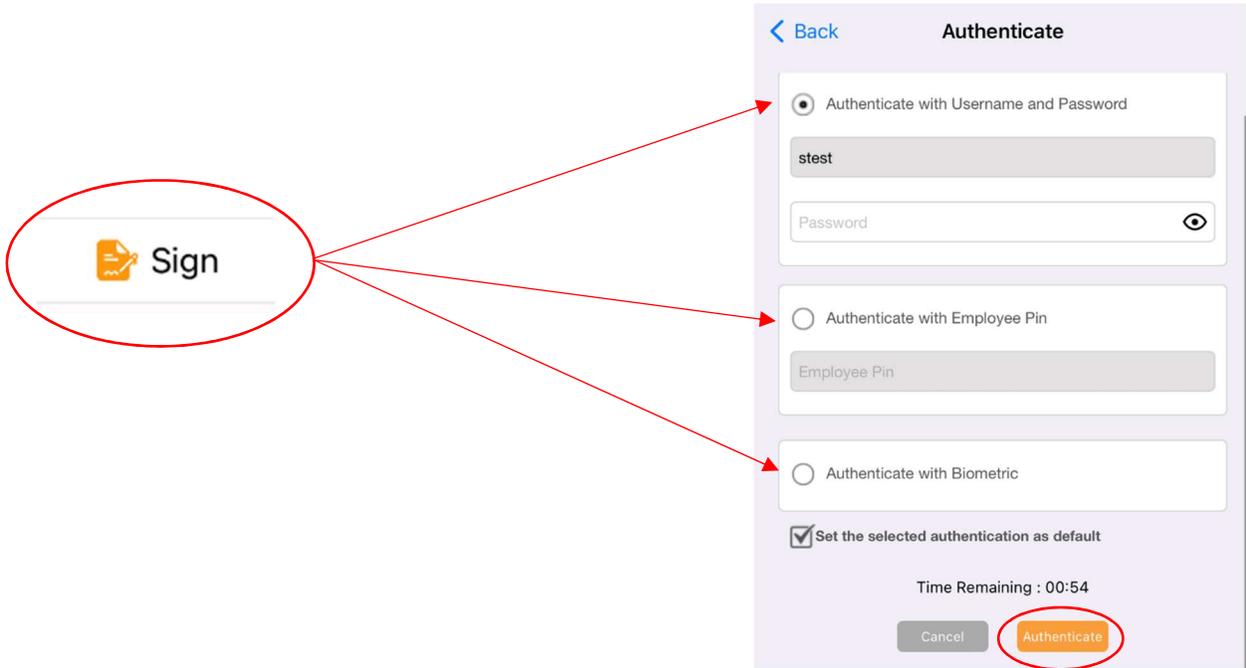
**Document Status:** in draft, signed, or approved



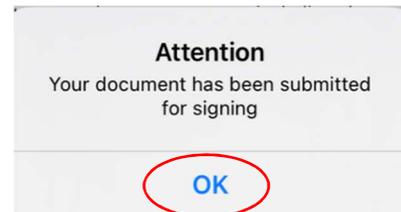
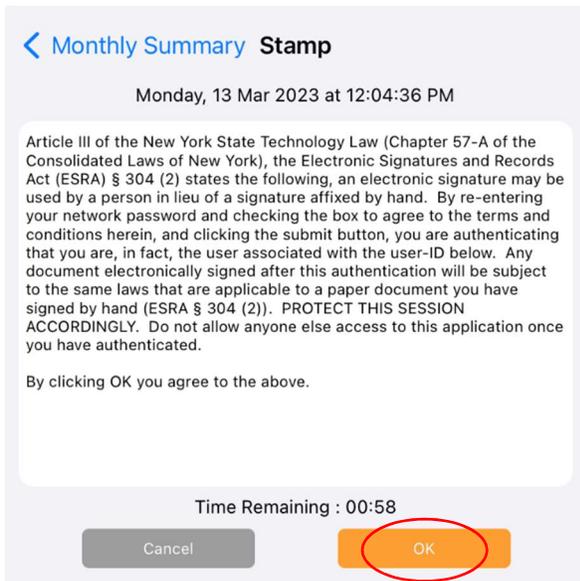
**Signature:** determines document status; Staff will sign draft when ready and SD Coordinator will sign to approve once the month has been completed



9. Select 'Sign' button (indicated by orange notepad; bottom of 'Monthly Summary' screen)
10. Select 'Authenticate' using 1 of 3 options below (indicated by orange button)



11. Select 'OK' to add signature stamp (indicated by an orange button)
12. Attention screen indicates document has been submitted for signing; Select 'OK'



13. Once signed status will show as 'Signed' with a stamp of signature from staff, date, and time

The screenshot shows a document status interface. At the top, the word "STATUS" is displayed. Below it, there are two columns of information. The first column is labeled "Doc. Status" and shows "Signed". The second column is labeled "Signed by" and shows "Test, Staff 03-14-2023 1...". Below these columns, there is a label "Approved by" which is currently empty. At the bottom of the interface, there is a yellow envelope icon followed by the text "Approve". A red oval highlights the "Signed" status and the "Signed by" information.

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