

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

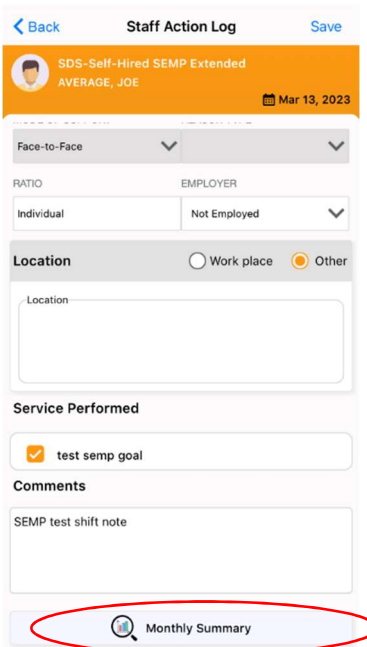
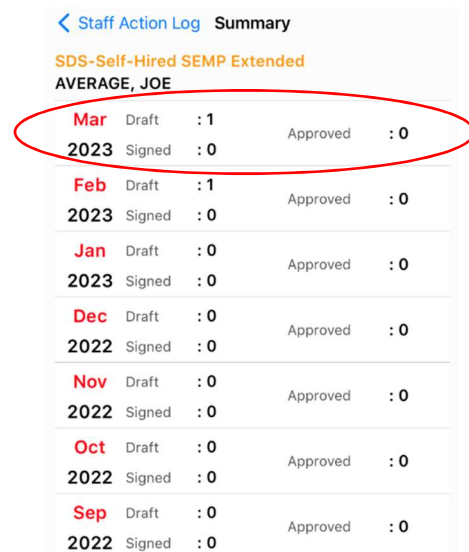
Monthly Summary due within the first week of the month – as communicated by Self-Directed team and eVero Communication

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

Month	Draft	Signed	Approved	Count
Mar	1	0	0	0
Feb	1	0	0	0
Jan	0	0	0	0
Dec	0	0	0	0
Nov	0	0	0	0
Oct	0	0	0	0
Sep	0	0	0	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**

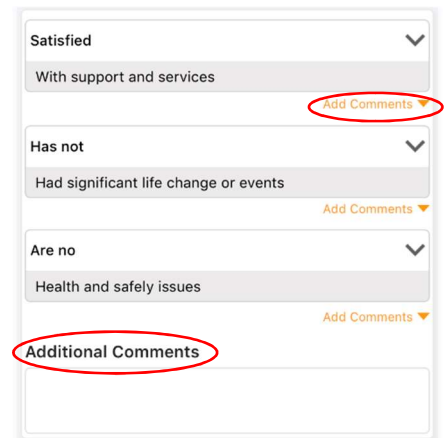
Employer Response: enter employer note for the selected month



Back Employer Response Done

AVERAGE, JOE
SDS-SELF-HIRED SEMP EXTENDED
MAR 2023

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



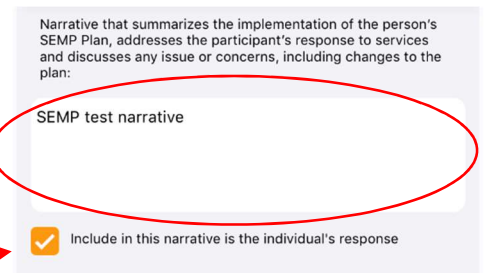
Satisfied
With support and services
Add Comments

Has not
Had significant life change or events
Add Comments

Are no
Health and safety issues
Add Comments

Additional Comments

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

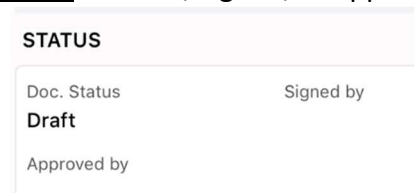


Narrative that summarizes the implementation of the person's SEMP Plan, addresses the participant's response to services and discusses any issue or concerns, including changes to the plan:

SEMP test narrative

☒ Include in this narrative is the individual's response

Document Status: in draft, signed, or approved



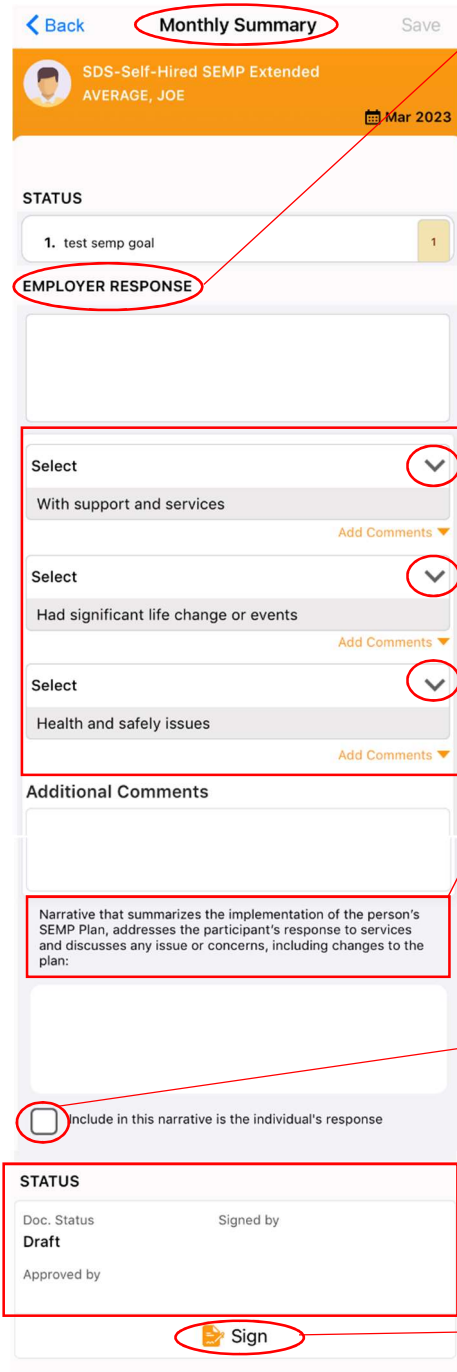
STATUS

Doc. Status Signed by

Draft

Approved by

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



Back Monthly Summary Save

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

STATUS

1. test semp goal 1

EMPLOYER RESPONSE

Select
With support and services
Add Comments

Select
Had significant life change or events
Add Comments

Select
Health and safety issues
Add Comments

Additional Comments

Narrative that summarizes the implementation of the person's SEMP Plan, addresses the participant's response to services and discusses any issue or concerns, including changes to the plan:

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STATUS

Doc. Status Signed by

Draft

Approved by

Sign

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)

The image shows a mobile application interface. On the left, a button labeled 'Sign' with an orange notepad icon is circled in red. Three red arrows originate from this button and point to the 'Authenticate' screen on the right. The 'Authenticate' screen has a title bar with a back arrow and the word 'Authenticate'. It contains three radio button options: 'Authenticate with Username and Password' (selected), 'Authenticate with Employee Pin', and 'Authenticate with Biometric'. The first option has input fields for 'test' and 'Password'. The second has an 'Employee Pin' field. The third is empty. Below these is a checked checkbox labeled 'Set the selected authentication as default'. At the bottom, there is a 'Time Remaining : 00:54' timer and two buttons: 'Cancel' and 'Authenticate' (circled in red).

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

The image shows a mobile application screen titled 'Monthly Summary Stamp'. It has a back arrow and the title. Below the title is a timestamp: 'Monday, 13 Mar 2023 at 12:04:36 PM'. The main content area contains a block of legal text regarding the New York State Technology Law (Chapter 57-A) and the Electronic Signatures and Records Act (ESRA) § 304 (2). It states that by re-entering the network password and checking the box to agree to the terms and conditions, the user is authenticating that they are, in fact, the user associated with the user-ID below. It also states that any document electronically signed after this authentication will be subject to the same laws that are applicable to a paper document signed by hand. It ends with 'PROTECT THIS SESSION ACCORDINGLY. Do not allow anyone else access to this application once you have authenticated.' Below the text is a line: 'By clicking OK you agree to the above.' At the bottom, there is a 'Time Remaining : 00:58' timer and two buttons: 'Cancel' and 'OK' (circled in red).

The image shows a mobile application screen titled 'Attention'. It has a message: 'Your document has been submitted for signing'. At the bottom, there is a button labeled 'OK' (circled in red).

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

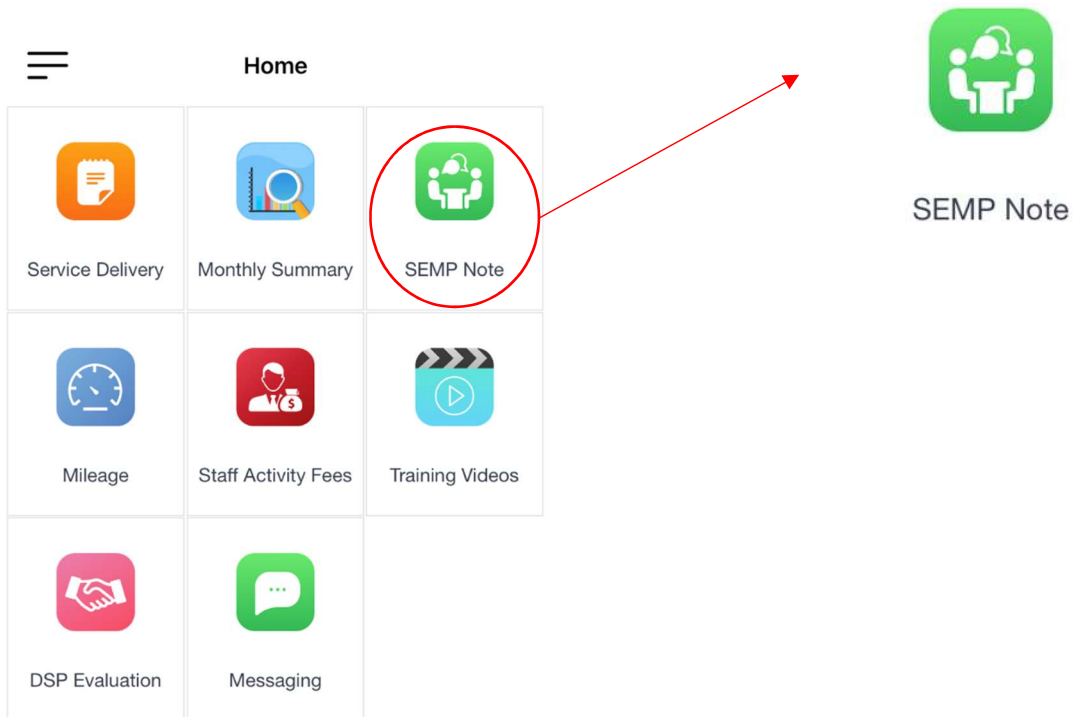
STATUS

Doc. Status	Signed by
Signed	Test,Staff 03-14-2023 1...
Approved by	

Approve

*Entering after the month has been completed:

- Select 'SEMP Note' to enter monthly summary



- Select Program to enter 'SEMP Note Summary' screen

Home	Programs
	SDS-Agency Supp SEMP Extended >
	SDS-Agency Supp SEMP Intensive >
	SDS-Self-Hired SEMP Extended >
	SDS-Self-Hired SEMP Intensive >
	SEMP EXTENDED >
	SEMP INTENSIVE >

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

Mar	Draft	: 1	Approved	: 0
2023	Signed	: 0		
Feb	Draft	: 1	Approved	: 0
2023	Signed	: 0		
Jan	Draft	: 1	Approved	: 0
2023	Signed	: 0		
Dec	Draft	: 0	Approved	: 0
2022	Signed	: 0		
Nov	Draft	: 0	Approved	: 0
2022	Signed	: 0		
Oct	Draft	: 0	Approved	: 0
2022	Signed	: 0		
Sep	Draft	: 0	Approved	: 0
2022	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**

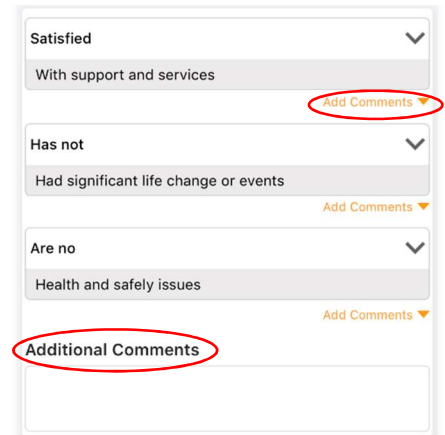
Employer Response: enter employer note for the selected month



Back Employer Response Done

AVERAGE, JOE
SDS-SELF-HIRED SEMP EXTENDED
Feb 2023

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



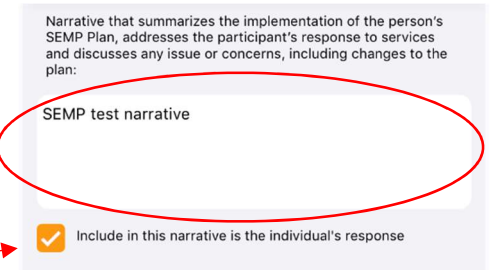
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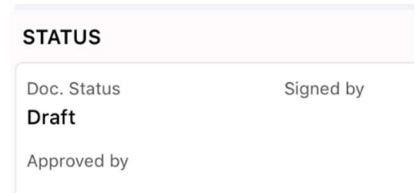


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SEMP test narrative

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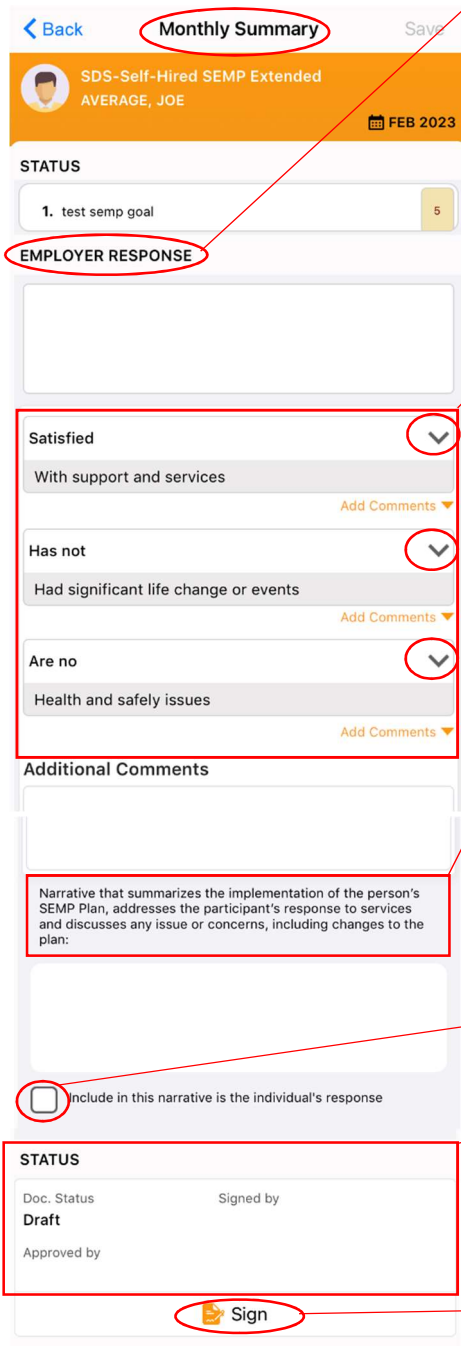
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Back Monthly Summary Save

SDS-Self-Hired SEMP Extended
AVERAGE, JOE
FEB 2023

STATUS

1. test semp goal 5

EMPLOYER RESPONSE

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Sign

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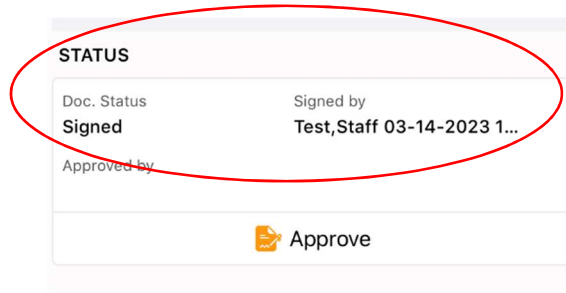
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11. Select 'OK' to add signature stamp (indicated by an orange button)
12. Attention screen indicates document has been submitted for signing; Select 'OK'

The image shows a screen titled 'Monthly Summary Stamp'. It displays the date and time: 'Monday, 13 Mar 2023 at 12:04:36 PM'. Below this is a large text block containing legal disclaimers about the New York State Technology Law (Chapter 57-A) and the Electronic Signatures and Records Act (ESRA). At the bottom, there is a 'Time Remaining : 00:58' timer and two buttons: 'Cancel' and 'OK' (circled in red).

The image shows a screen titled 'Attention'. It displays the message: 'Your document has been submitted for signing'. At the bottom, there is a button labeled 'OK' (circled in red).

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 left column is labeled "Doc. Status" and shows "Signed". The right 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 button with a checkmark icon and the text "Approve". A red oval is drawn around 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