

# Self-Hired Staff Toolkit

## Self-Hire Community Habilitation Monthly Summaries

### WHAT ARE MONTHLY SUMMARIES?

To ensure that a person's community habilitation goals are meaningful and person-centered, it's important to be able to gauge a person's progress toward their goals. A community habilitation monthly summary is intended to summarize the person's progress on their community habilitation goals along with any concerns that arose throughout the month. Everyone progresses differently, and it is expected progress will ebb and flow. The monthly summary allows a snapshot of progress and can be used to help the team determine if a goal needs to be revised.

Community habilitation monthly summaries address each goal in the person's staff action plan and are used to record an update on how the goal was worked on throughout the month. This document summarizes the implementation of the person's staff action plan, addresses their response to the services provided and if there were any issues or concerns. For each goal, self-hire staff members review what was provided and document if the person they support regressed, maintained or improved on that skill/goal. For any goal not worked on, staff members document what barriers prevented them from working on the goal.

### MONTHLY SUMMARY TIMEFRAME REQUIREMENTS:

**The monthly summary is an OPWDD-required document for habilitative services. Failure to complete this summary within the appropriate timeframe may jeopardize service billing and program sustainability.**

OPWDD has strict timeframe expectations for when monthly summaries are due. To meet that timeframe, Heritage Christian Services expects that monthly summaries are completed by the designated staff member\* by the 15th of the following month. For example, January's monthly summary is due by February 15th.

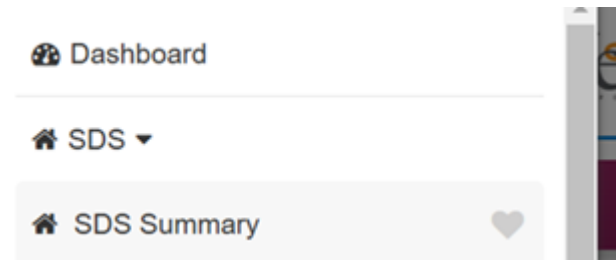
*\*If you have multiple staff members, please designate one staff member to complete the summary each month. If you only have one staff member, it is their responsibility to complete the monthly summary.*

**See computer and mobile device directions on following pages.**

# HOW CAN YOU REVIEW A STAFF MEMBERS MONTHLY SUMMARY?

From your laptop/desktop computer:

1. Log into the eVero at myeveroportal.com and click on **SDS Summary**:



2. Scroll down to click on **Monthly Summary List** and select the monthly summary you'd like to view:

Monthly Summary List: Jun 2024 - Nov 2024					
Summary Month	Summary ID	Facility Name	Program	Service Plan Date	Status
05/01/2022	11115	Corporate Office	SDS-Self-Hired Community Habilitation	08/01/2021	
04/01/2022	10831	Corporate Office	SDS-Self-Hired Community Habilitation	08/01/2021	

3. When you click on the summary month, you will be able to view and click **Review** to acknowledge that you have read the summary.

Monthly Summary - Self-Hired Community Staff Action Plan

Enrolled In Waiver

Name: Chew Bacca (14302)

Agency: Heritage Christian Services, Inc.

Medicaid #: CHEWY123

Facility: Corporate Office

Tabs ID: 1

Category of Service: SDS-Self-Hired Community Habilitation

Start Date: 10/20/2023

Site Address: 275 Kenneth Dr., Suite 100  
Rochester, NY 14623

Valued Outcome: To be more independent

Key:

S Service

CS Clinical Service

PS Personal Safeguard

TS Transition Service

Monthly Progress:

I Improved

D Did Not Maintain Previous

N No Update Required

M Maintained

E Extended Absence

Staff Support

S Supervision

V Verbal Prompt

Individual Response

P Partially Engaged

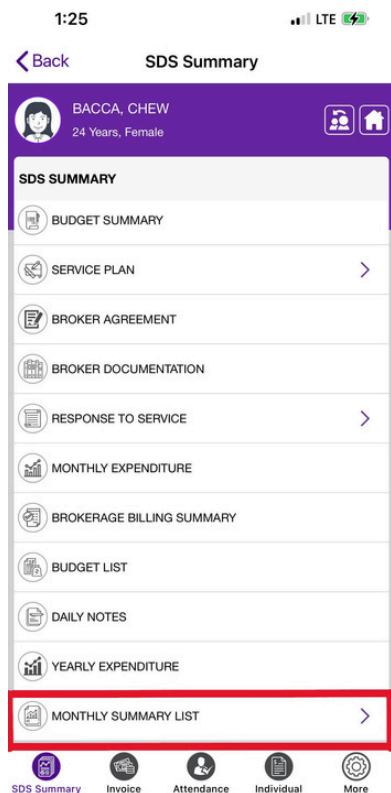
#	Services and Personal Safeguards	Key	Date		Monthly progress	Individual Response	Staff Support
			Initiated	Completed			
1	Teach skills for Independent Living	HG	10/20/2023		I	P (1)	S (1), V (1)

Review

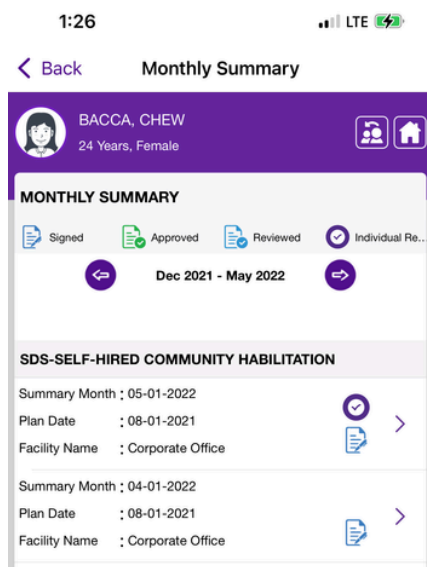
Cancel

## From your mobile device:

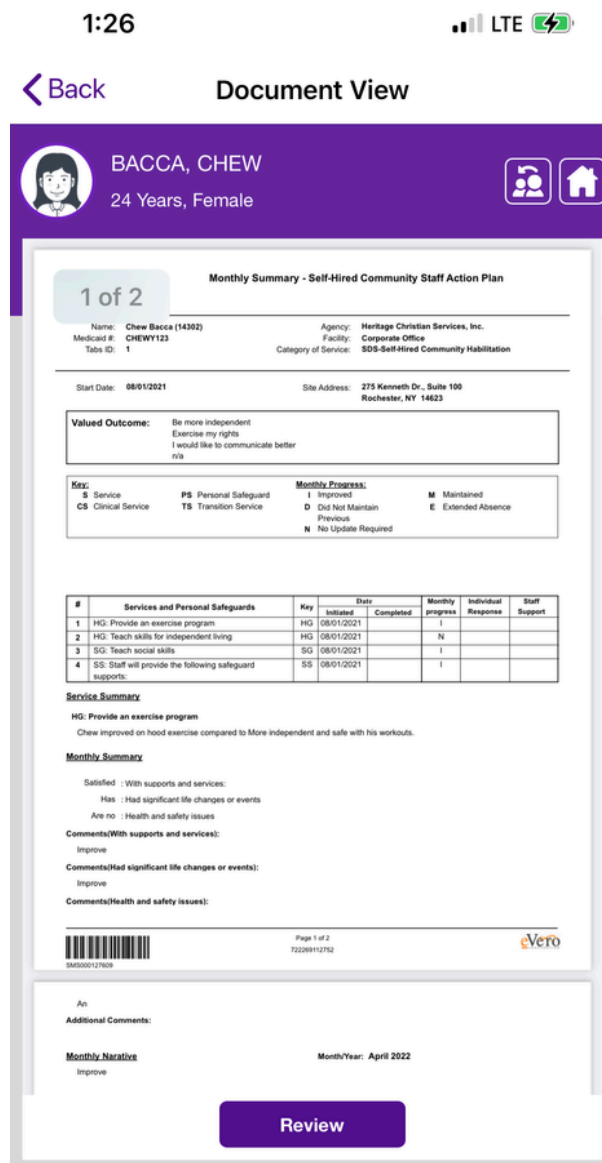
1. Log into the eVero Portal app and select **SDS**, scroll to the bottom of the list and select **Monthly Summary**



2. Click on the **summary** you want to view.



3. **Review the summary.** You can add your review using the 'review' button if in agreement with the summary.



If you have questions or trouble accessing monthly summaries to review, please reach out to your Fiscal Intermediary and they will be happy to assist you.

**Note: Monthly summaries are not required for respite services.**

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