

Monthly Summary Process for Individuals/Families (only needed for Comm Hab and SEMP)

***note that staff can also complete the monthly summary with the individual on their portal – it is a simplified process.

1)Log onto myeveroportal.com

2)Click SDS tab.

3)Start by clicking Response to Services (at bottom of SDS tab)

The screenshot displays the myCarePortal interface, powered by eVero. The header includes the logo and navigation tabs: Dashboard, SDS (selected), Transportation, Staff Activity Fees, Documents, and Help. A notification bell icon shows 0 alerts. The main content area is for a user named "Testgirl, Casey (13823)", born 02/21/1980, 40 yrs, Female. A blue arrow points to the "Response To Service" option in the SDS dropdown menu. The "Contact Info" section shows the address: 100 Smith Street, Middletown, NY, 10940, contact name: TESTGIRL, CASEY, phone: (845) 216-0098, and email: testgirl5@gmail.com. The "Care Team" section is partially visible at the bottom.

myCarePortal™ Powered by eVero

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Testgirl, Casey (13823)
02/21/1980, 40 yrs, Female

Dashboard SDS Transportation Staff Activity Fees Documents Help

Individual

Contact Info

Address: 100 Smith Street, Middletown, NY, 10940

Contact Name: TESTGIRL, CASEY

Phone: (845) 216-0098

Email: testgirl5@gmail.com

Care Team

SDS Summary
Invoice
Daily Note
Broker Documentation
Attendance Roster
Monthly Summary Note
Response To Service

Response to services allows you to review both staff comments and summary of what staff report when providing the services. You can use this information to take notes of things you would like to point out in the monthly summary note. This would include any information gained that would highlight progress, maintenance or lack of progress for each service.

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Testgirl, Casey (13823)
02/21/1980, 40 yrs, Female

Dashboard

SDS

Transportation

Staff Activity Fees

Documents

Help

0

Response To Service List

Response To Service List

All

Show last 12 Months

Program SDS-Self-Hired Community Habilitation

Refresh

Summary Month	Facility Name	Individual Response	Comments	Summary
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
February 2020	CFS Self Directed Supports	F (1)	View	View



823)

Preview

Response To Services Summary

1 of 1 80%

eVero

**CFS Self Directed Supports SDS Self-Hired Community Habilitation
DOCUMENTATION RECORD INDIVIDUAL SUMMARY SHEET**

Name: Casey Testgirl (13823) Agency: The Center for Family Supports
Medicaid #: A E12345E Facility: CFS Self Directed Supports
Tab ID: 147896 Program: SDS Self-Hired Community Habilitation

Month/Year of Service: February 2020 Site Address: 100 Smith Street
Middletown, NY 10940

DESCRIPTION OF THE (INDIVIDUALIZED STAFF SERVICE)	Day of Month																														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
pro Casey would like to learn money management - on going						F																									
						V1																									
						LC																									
ORC/PRATIO						1:1																									
TOTAL HOURS/SERVICES	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Consumer Response Legend

PE Partially Engaged	NR No Response Required	PR Partially Engaged
PR Personal Caregiver	RR Refused, Staff/Client To Prompt	

Staff Support Legend

PH Physical
V Verbal
O Oral/Text
PP Partial Physical
S Supervision

Format

P	Response
Y9+	Support
G1	Support
PP	Partial Physical
SP	Supervision

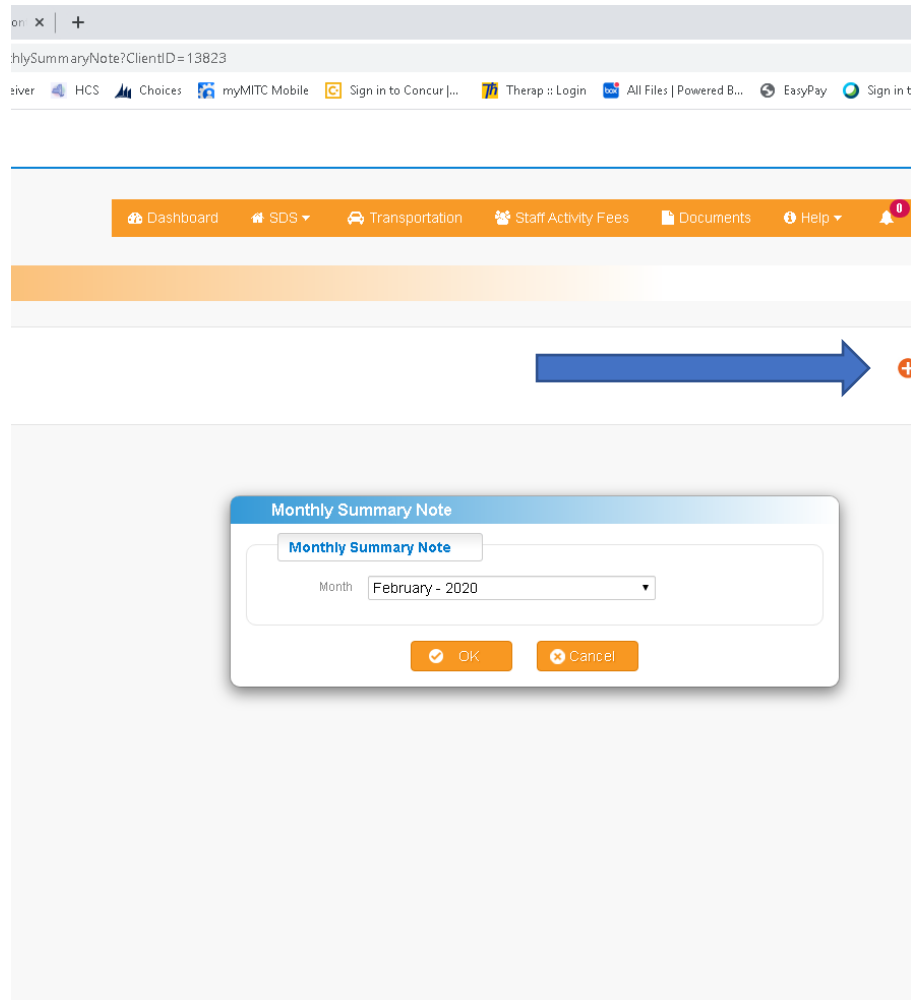
By signing below, we are verifying that on each service date recorded on this form, the program day duration is accurately documented.

INITIALS STAFF NAME SIGNATURE

Cancel

After reviewing Responses to services summary and comments, return to SDS tab and click on Monthly Summary Note.

Click on Red plus at right hand corner to enter a new note, select the month that you are reporting on and click ok.



This Monthly Summary Note is only necessary for Comm Hab and SEMP. You do not need to report on any other services.

1) Under progress click the box Work towards the following goals/valued outcomes.

2) In the box below write in the Valued Outcomes and then summarize implementation of the plan. An example would be:

VO 1 – Increase money management skills. Casey was fully engaged with this goal this month. She has been making progress with learning how to do banking tasks but continues to need support.

The screenshot shows a web application interface for creating a 'Monthly Summary Note' for a client named 'Testgirl, Casey (13823)'. The interface includes a top navigation bar with various links like 'Dashboard', 'SDS', 'Transportation', 'Staff Activity Fees', 'Documents', and 'Help'. The main form is divided into several sections:

- Individual Information:** Contains fields for 'Month' (February, 2020), 'Fiscal Intermediary (FI) Agency' (The Center for Family Supports), 'Medicaid No.' (AE12345E), and 'Services' (Community Habilitation, Supported Employment(SEMP), Other).
- Progress:** Includes a list of services and supports that helped the client, with checkboxes for 'Improve my independence at home and in my community', 'Live safely at home', 'Be more involved in my community', 'Improve my health', 'Engage in meaningful activities such as', and 'Work towards the following goals/valued outcomes'. Below this is a text box for a 'Brief summary of implementation of the Habilitation plans (if applicable)'.
- Follow Up:** Contains two questions: 'Would you like to change anything about your services and supports?' and 'Do you have any service-related concerns that need to be addressed?'. Both have 'Yes' and 'No' options.
- Document Status:** Shows the current status as 'Draft' and includes fields for 'Reviewed By (Individual)' and 'Reviewed By (Staff)'.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The browser's taskbar is visible at the very bottom, showing the time as 10:00 PM.

Answer the follow up questions.

Once complete, click the bottom to Save the report, then click Preview to approve the Report (otherwise it stays in draft).