FAQ

Updated 05/10/22.

What are Monthly Summary Notes?

Monthly Summary Notes act as progress indicators of the work being done as part of the participant's Staff Action Plan.

Why are Monthly Summary Notes required?

Monthly Summary Notes are part of the feedback mechanism required by law to be eligible to bill Medicaid.

How often do I need to submit Monthly Summary Notes?

A Monthly Summary Note must be submitted for each Budget Group (ComHab and SEMP) for each month that support staff work a ComHab or SEMP job for a participant. For example, if a participant has support staff who worked hours for Job Developer and ComHab during September 2020, two different Monthly Summary Notes need to be submitted for that month: one for SEMP (Job Developer) and one for ComHab.

When can I submit a Monthly Summary Note?

A Monthly Summary Note for a given month can be submitted no earlier than the last day of that month. For example, a Monthly Summary Note for September 2020 can be submitted anytime on or after September 30, 2020, but not before.

Who can submit Monthly Summary Notes?

The following can submit Monthly Summary Notes, if they have a portal account:

- Participant
- Primary Contact
- Parent/Guardian (if designated as an approver)
- Family/Circle Contact (if designated as an approver)
- Support Broker

To designate someone as an approver, contact your SD Coordinator.

What is a "Budget Group"?

Budget Group is related to the participant's Budget Summary. Budget Group is what is used to bill Medicaid, and can be the parent to other budget lines. For instance, a number of budget lines are all included under the IDGS Budget Group.

For the purposes of Monthly Summary Notes, the only Budget Groups that apply are ComHab and SEMP.

The Budget Group I'm looking for doesn't show up. What do I do?

The values in the Budget Group dropdown are based on past and currently active support staff for the participant. If, for instance, SEMP does not show up as an option in the dropdown, that means the participant does not currently have a support staff hired into a SEMP job role.

If the Budget Group you are looking for doesn't show as an option, contact ISS People Services at peopleservices@issny.org.

Why is a Budget Group I no longer have still showing?

The values in the Budget Group dropdown are based on past and currently active support staff for the participant. If you previously had both ComHab and SEMP in your plan and staff working those jobs, you will continue to see both options even if one of them is no longer in your plan.

Both choices must remain active to allow a Monthly Summary Note to be created for any that are due currently as well as might not have been done in the past and are still due.

What is a "Draft" Monthly Summary Note?

The "draft" Monthly Summary Note shows a list of all the activities on the Staff Action Plan that was active during the month/year selected for the Budget Group selected. If multiple Staff Action Plans were active, the activities for each will be shown. If the selected month/year falls before the participant's first Staff Action Plan, activities from the oldest Staff Action Plan on file will be shown.

What shows on the PDF version of the Monthly Summary Note?

The downloadable PDF of the Monthly Summary note shows a list of all the activities on the Staff Action Plan that was active during the month/year selected for the Budget Group selected, as well as the responses provided to each question. If multiple Staff Action Plans were active for the month/year and Budget Group selected, the activities for each will be shown. If the selected month/year falls before the participant's first Staff Action Plan, activities from the oldest Staff Action Plan on file will be shown.