Monthly Summary Notes FAQ

General Questions

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.

Submission Questions

When is a Monthly Summary Note due?

Monthly Summary notes are due on the first day of the month for services provided the previous month. For example, September's MSN is due on October first.

A count down will show on the upper right of the MSN widget on your Portal home page. That count down will show you how long before the currently due MSN is considered past due. The count down starts on the first of the month.

ISS requests that MSNs be submitted by the 10th of the following month. Please contact your Self-Direction Coordinator if you have any questions regarding due dates and compliance.



How often do I need to submit Monthly Summary Notes?

A Monthly Summary Note must be submitted for each Bill Type / Budget Group (ComHab and SEMP) for each month that support staff work a ComHab or SEMP job for a participant.

Billable work is what triggers the requirement for an MSN. If PTO is the only thing paid during a month, then an MSN is not required.

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 can be submitted no earlier than the first day of the following month. For example, September's MSN is due on October 1st.

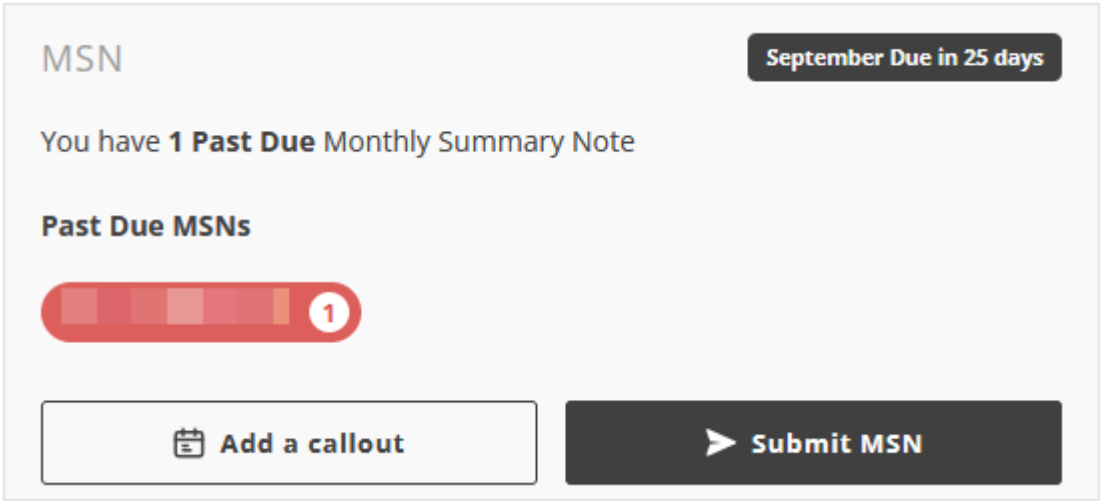
The old Monthly Summary Note feature allowed MSNs to be completed on the last day of the month. The MSN AI Summary Helper has been aligned better with OPWDD requirements and ISS business rules as noted above.

> **If staff only worked near the end of a month**, a Monthly Summary Note may not appear to be needed until ISS has finished processing and billing the payroll that covers all the dates at the end of the month. Depending on the calendar and how late in the month the staff worked, the need for an MSN may not appear until after the first or second staff payday of the following month.

When is a Monthly Summary Note Past Due?

A Monthly Summary Note is past due at the end of the month following the month of service. For example, September's MSN is due on October 1st and is past due on November 1st.

The MSN widget on your Portal home page will let you know if you have any past due MSNs. You will see a note that tells you how many are past due and you will see a list of the Participants with past due MSNs in red ovals with the number of MSNs that are past due indicated on the right in a white circle.



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 (if designated as an approver)

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

Why don't I see the MSN widget or Submit MSN button?

You must be assigned the permission to submit a Monthly Summary Note for a given participant. If you believe you should have access, but do not see the MSN options, reach out to your SD Coordinator.

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 Bil Type / 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 Bil Type / Budget Group selected, as well as the responses provided to each question. If multiple Staff Action Plans were active for the month/year and Bill Type / 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.

Bill Type and Budget Group Questions

What is a "Bill Type" or "Budget Group"?

Bill Type (on the new MSN with AI Summary Helper) or Budget Group (on the old MSN feature) is related to the participant's Budget Summary. Bill Type / 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 Bill Types or Budget Groups that apply are ComHab and SEMP.

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

The values in the Bill Type and 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 Bill Type or Budget Group you are looking for doesn't show as an option, contact ISS People Services at peopleservices@issny.org.

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

The values in the Bill Type and 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.

Updated 10/07/26.

Revision #23
★Created 2020-09-22 16:38:11 UTC by Admin
Updated 2026-10-07 20:57:24 UTC by Elizabeth Lukan