

Submitting Monthly Summary Notes with ISS' AI Summary Helper

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

The MSN widget on the Portal home page shows any Monthly Summary Notes that are ready to be completed. The new MSN process brings the month's activities, summary, and callouts together in one place. It can also create a draft response for each question to help you get started.

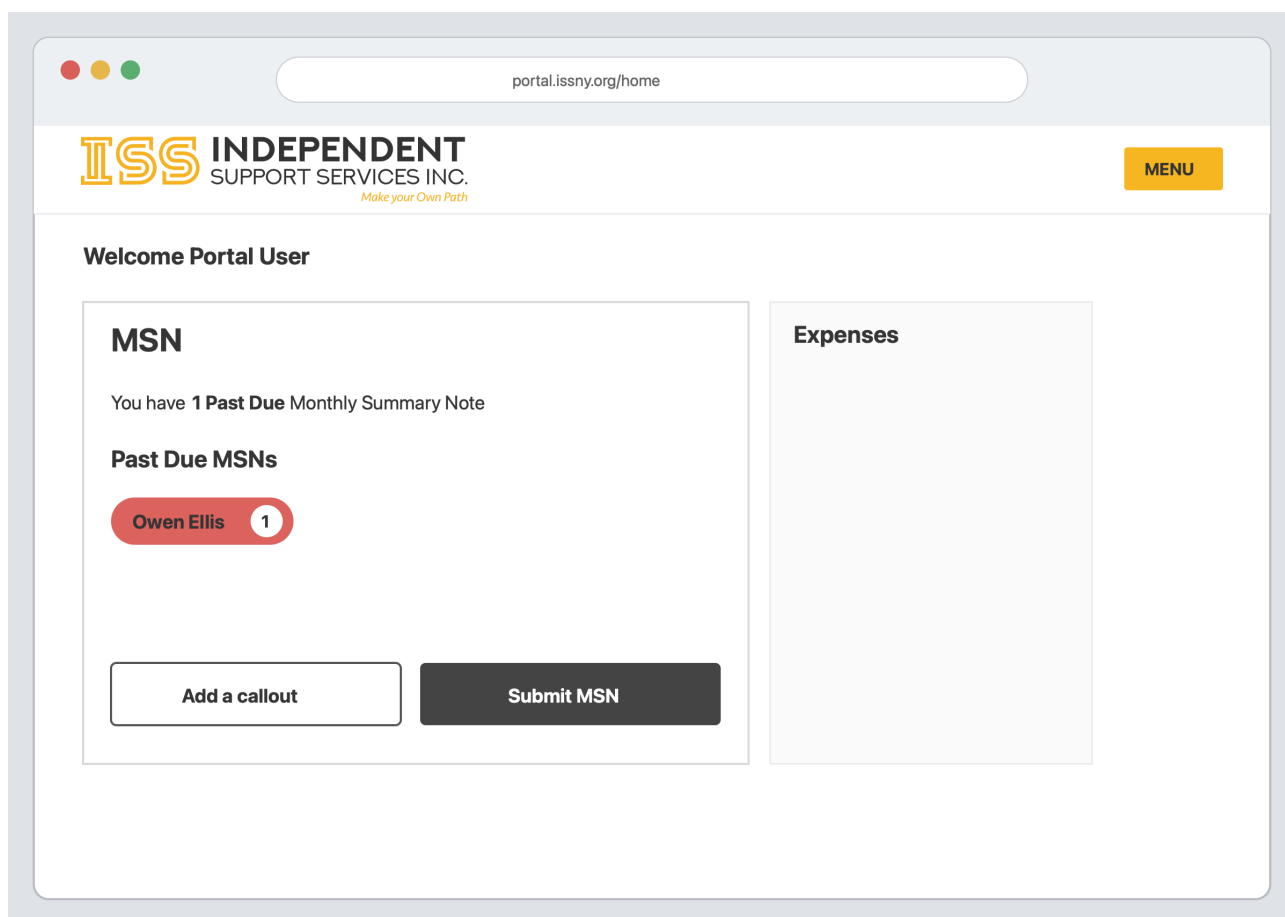
The draft is based on the information shown in the MSN. Be sure to read each response and make any needed changes before submitting it.

Images in this guide use fictional names and sample information.

The MSN Widget

The *MSN* widget is located on the Portal home page. It shows:

- The number of past due Monthly Summary Notes
- The participant who needs a Monthly Summary Note
- *Add a callout* button
- *Submit MSN* button



Adding a Callout

A callout is a short note about something that happened during the month. You can add a callout for an accomplishment, a new skill, an important event, or a concern. You cannot add callouts for past MSNs.

Callouts are only available to the Portal user who creates them. If another Portal user has permission to do an MSN for the same participant, they will not see callouts created by another user.

Callouts are included with the other information used to create draft responses so make sure the callout is for the correct participant, Bill Type, and month.

From the home page:

1. Click *Add a callout* in the MSN widget.
2. Check the month shown at the top of the window.
3. Select the *Participant*.
4. Select the *Bill Type*.
5. Enter the note in the *Callout* field.
6. Click *Add callout*.

Use clear and specific information in a callout. Remember that the information may appear in a draft Monthly Summary Note.

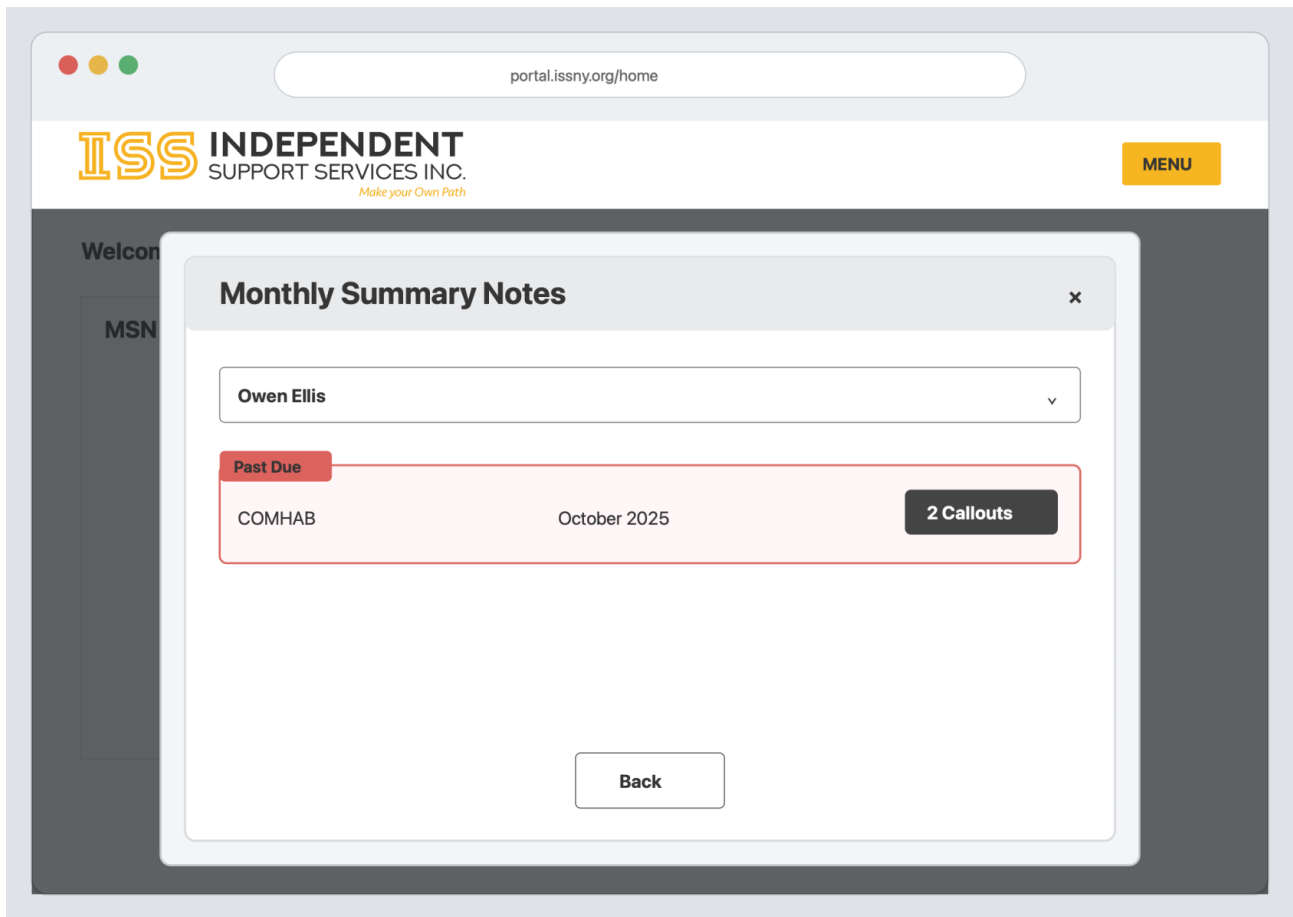
The screenshot shows a web browser window with the URL `portal.issny.org/home`. The header features the ISS Independent Support Services Inc. logo with the tagline "Make your Own Path" and a yellow "MENU" button. The main content area is a modal titled "Add a callout" for "September 2026". It contains three dropdown menus: "Participant" (selected: Owen Ellis), "Bill Type" (selected: COMHAB), and "Callout" (empty). A text area for the callout message is below the dropdowns, with a "255 characters remaining" indicator. At the bottom are "Back" and "Add callout" buttons.

Step By Step Instructions

From the home page:

1. Click *Submit MSN* in the *MSN* widget.
2. Select the participant from the dropdown.
3. Find the Monthly Summary Note you want to complete.
4. Click the row for that Bill Type and month.

A red *Past Due* label shows if that Monthly Summary Note is overdue. The number of callouts for the month is shown on the right.



Reviewing the Monthly Information

The Monthly Summary Note opens with three tabs: **Activity**, **Summary**, and **Callouts**. The number beside each tab shows how many items are available.

Review all three tabs before completing the questions.

Activity

The *Activity* tab shows the activities worked on during the month. It also shows the hours, number of times, and the staff who provided support.

portal.issny.org/home

ISS INDEPENDENT

SUPPORT SERVICES INC.

Make your Own Path

MENU

Welcom

MSN

COMHAB October 2025

x

Activity 4

Summary 1

Callouts 2

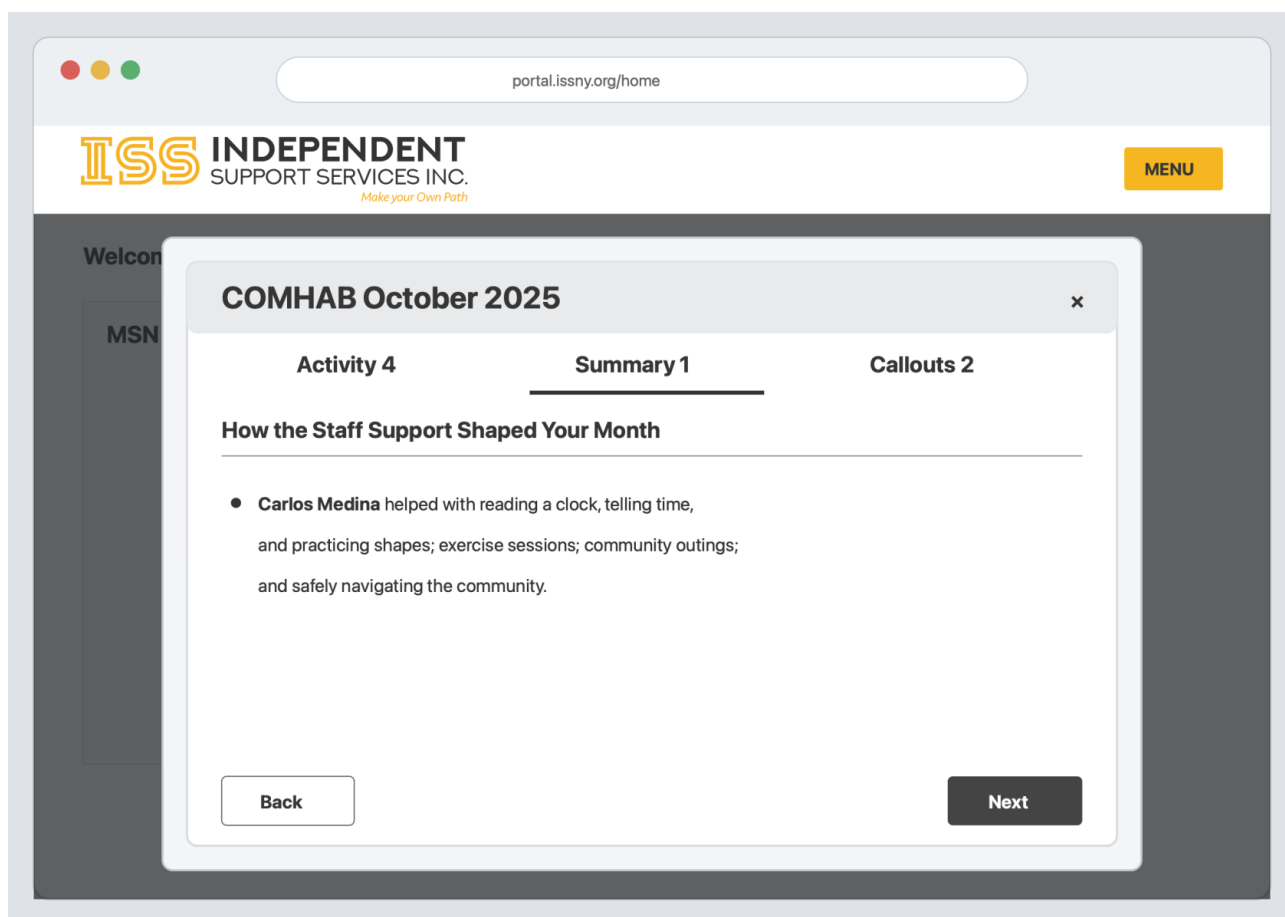
Activity snapshot with the People who helped

Activity	Times
Practice reading a clock, telling time, and identifying shapes.	1
5.5 Hrs	Carlos Medina (1)
Encourage, model, and motivate exercise.	4
15.32 Hrs	Carlos Medina (4)
Support community classes, events, errands, and outings.	8
31.52 Hrs	Carlos Medina (8)

Next

Summary

The *Summary* tab gives an overview of the support provided during the month.



Callouts

The *Callouts* tab shows the callouts added for the month. Check that each callout belongs to the Monthly Summary Note you are completing.

The screenshot shows a web browser window with the URL `portal.issny.org/home`. The header features the ISS INDEPENDENT logo with the tagline "SUPPORT SERVICES INC. Make your Own Path" and a yellow "MENU" button. The main content area displays a form titled "COMHAB October 2025" with a close button (x). The form has three tabs: "Activity 4", "Summary 1", and "Callouts 2", with "Callouts 2" being the active tab. Under the "Callouts for this month" section, there are two entries: one for "Oct 8, 2025" with the text "Carlos helped me learn how to read a map." and another for "Oct 21, 2025" with the text "I practiced using community safety skills during an outing." Below these entries is a confirmation statement: "Confirm that each callout applies to this service and reporting month." At the bottom of the form are "Back" and "Next" buttons.

When you are finished reviewing the information, click *Next*.

Completing the Questions

There are a few questions to complete. The circles and page number at the bottom of the window show your progress.

For each question:

1. Read the question.
2. Click *Generate Draft*.
3. Wait for the response to appear.
4. Read the entire response.
5. Make any needed changes in the response field.
6. Click *Next* to continue.

The screenshot shows a web browser window with the URL `portal.issny.org/home`. The header features the ISS INDEPENDENT logo with the tagline 'SUPPORT SERVICES INC. Make your Own Path' and a yellow 'MENU' button. The main content area displays a modal window titled 'COMHAB October 2025'. Inside the modal, the text reads: 'Due to the support I received from my ComHab staff, I was able to:'. Below this is a text input field containing the sentence: 'This month, I practiced reading a clock, telling time, and shapes; exercised; attended community outings; and worked on safe community navigation, including reading a map.' To the right of the text field is a 'Generate Draft' button. Below the text field, it indicates '84 characters remaining' and '1 of 3' questions. At the bottom of the modal are 'Back' and 'Next' buttons. The background of the portal shows a 'Welcome' message and a 'MSN' button.

The draft may include information from the **Activity**, **Summary**, and **Callouts** tabs. If you see something you did not expect, go back and check those tabs. Correct anything that is inaccurate before continuing.

Click *Previous* if you need to return to an earlier question.

Submitting the Monthly Summary Note

On the last question:

1. Read the question and the full response.
2. Make any needed changes.
3. Click *Submit MSN*.

The screenshot shows a web browser window with the URL `portal.issny.org/home`. The header features the ISS INDEPENDENT logo with the tagline "SUPPORT SERVICES INC. Make your Own Path" and a yellow "MENU" button. The main content area displays a modal window titled "COMHAB October 2025" with a close button (x). Inside the modal, the question "Were there any concerns or issues this month?" is followed by a large text input area. A "Generate Draft" button is located in the top right of the input area. Below the input area, a message states: "Review the generated response and make any necessary corrections before submitting the Monthly Summary Note." A character count "255 characters remaining" is shown on the right. At the bottom of the modal, there are three radio buttons, a "Back" button, a "Previous" button, and a "Submit MSN" button. The background of the portal shows a "Welcome" message and an "MSN" widget.

Only one Monthly Summary Note per month and Bill Type can be submitted. After it is submitted, it will no longer show as available in the MSN widget.

You can still add callouts when there are no Monthly Summary Notes ready to submit.

Disclaimer: All names displayed in the above screen shots are fictional characters. No identification with actual persons (living or dead) is intended or should be inferred.

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