

Submitting Monthly Summary Notes

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

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.

<https://player.vimeo.com/video/891991252?title=0&byline=0>

Step By Step Instructions

To submit Monthly Summary Notes, first navigate to the Plan Docs section of the participant for whom you are submitting.

From the home page,

1. Select the participant.

Welcome Maxine Ellis

Expenses

Upload your latest expenses and receipts for review and approval.

[Submit Now »](#)

Choose A Participant

Ellis, Owen

Medicaid:

DOB:

Title: **Primary Contact**

Coordinator:

2. Select the **Documents** tab.

Showing: Owen Ellis

ISS INDEPENDENT
SUPPORT SERVICES INC.
Make your Own Path

Dashboard Budget Documents Staff Action Plan Staff Contacts **MENU**

Dashboard For Owen Ellis



3. Select the **Plan Docs** tab.

View All



Timesheets

Pg 0 of 0

Expenses

Pg 0 of 0

Plan Documents

Category: All

Filter

+ Monthly Summary Notes

MONTHLY SUMMARY NOTES

NAME	TYPE	SUBMISSION DATE	ACTIONS
Jul 2020 - COMHAB - 2276 - MSN.pdf	pdf	9/22/2020	Download

4. Click + **Monthly Summary Notes**.

5. Fill in Month/Year and Budget Group.

- Month/Year must be in the form MM/YYYY.
- Budget Group is either ComHab or SEMP.

◦ Don't see what you're looking for? See [Monthly Summary Notes FAQ](#).

6. Click **View Draft** to view a draft of the Monthly Summary Note.

- [Learn more about Draft Monthly Summary Notes](#).

Submit Monthly Summary Note



Month/Year*

08/2020

Budget Group*

COMHAB



View Draft

Next

7. Click **Next** to complete the form.

8. Fill in all required fields.

- Only one Monthly Summary Note per month per Budget Group is allowed.

Submit Monthly Summary Note ×

1. This month I participated in activities related to my ComHab Staff Action Plan by working on the following goals: **(required)**

Characters Remaining: 255

2. Due to the support I received from my ComHab staff, I was able to: **(required)**

Characters Remaining: 255

3. Were there any concerns or issues this month?

Characters Remaining: 255

[Back](#) [Submit](#)

9. Click **Submit** when done.

The participant's SD Coordinator will receive an email notification to review the Monthly Summary Note.

The person who submitted the Monthly Summary Note will receive a confirmation email when the SD Coordinator either approves or rejects the Monthly Summary Note. If it is rejected, a new one will need to be submitted.

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.

Updated 12/7/2023

🔄Revision #22

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