Submitting Monthly Summary Notes

> We have released a new MSN AI Summary Helper! Visit Submitting Monthly Summary Notes with ISS' AI Summary Helper for more information. We'll be leaving the old MSN feature online for now.

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.

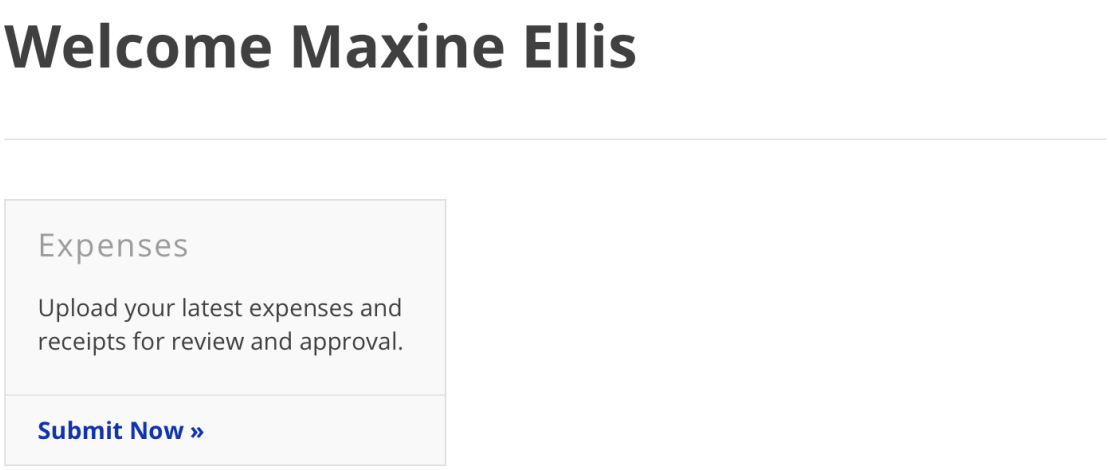
https://player.vimeo.com/video/891991252?title=0&byline=0

Step By Step Instructions

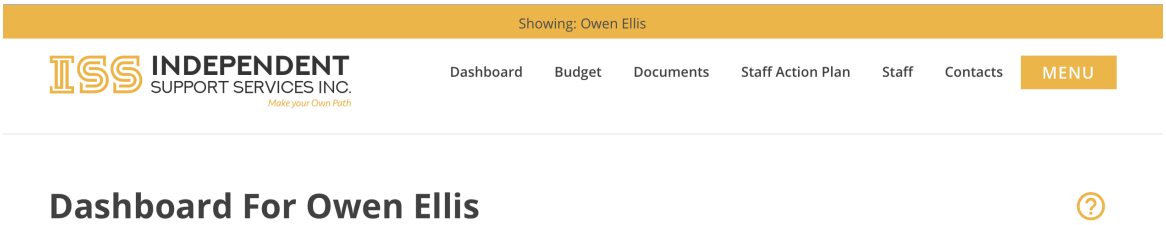
To submit Monthly Summary Notes, first navigate to the Plan Docs section of the participant for whom you are submitting.

From the home page,

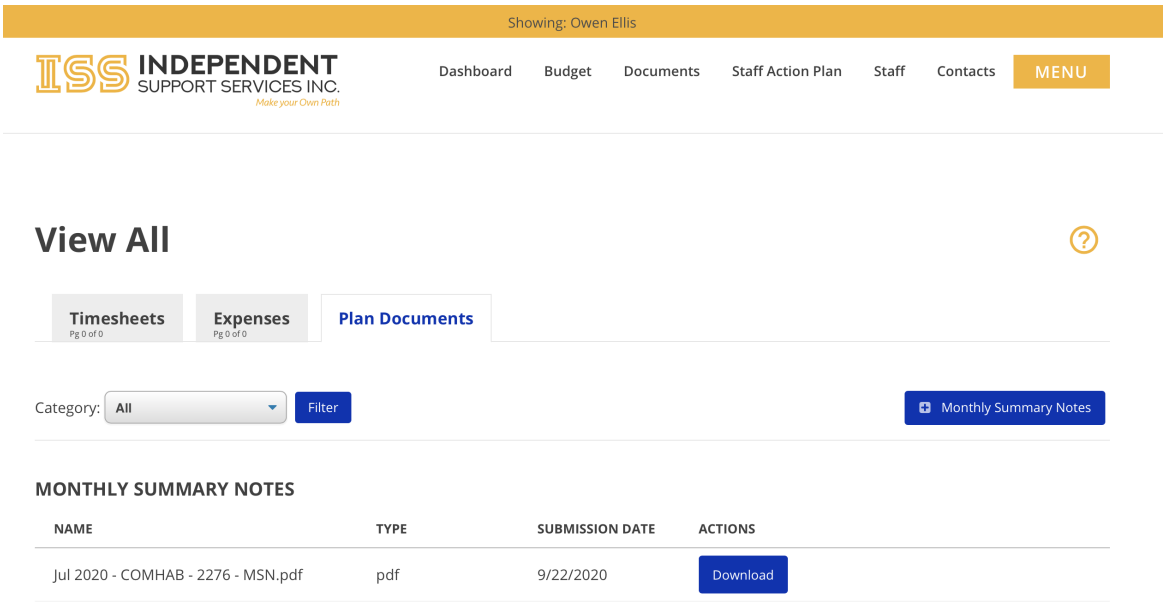
1. Select the participant.



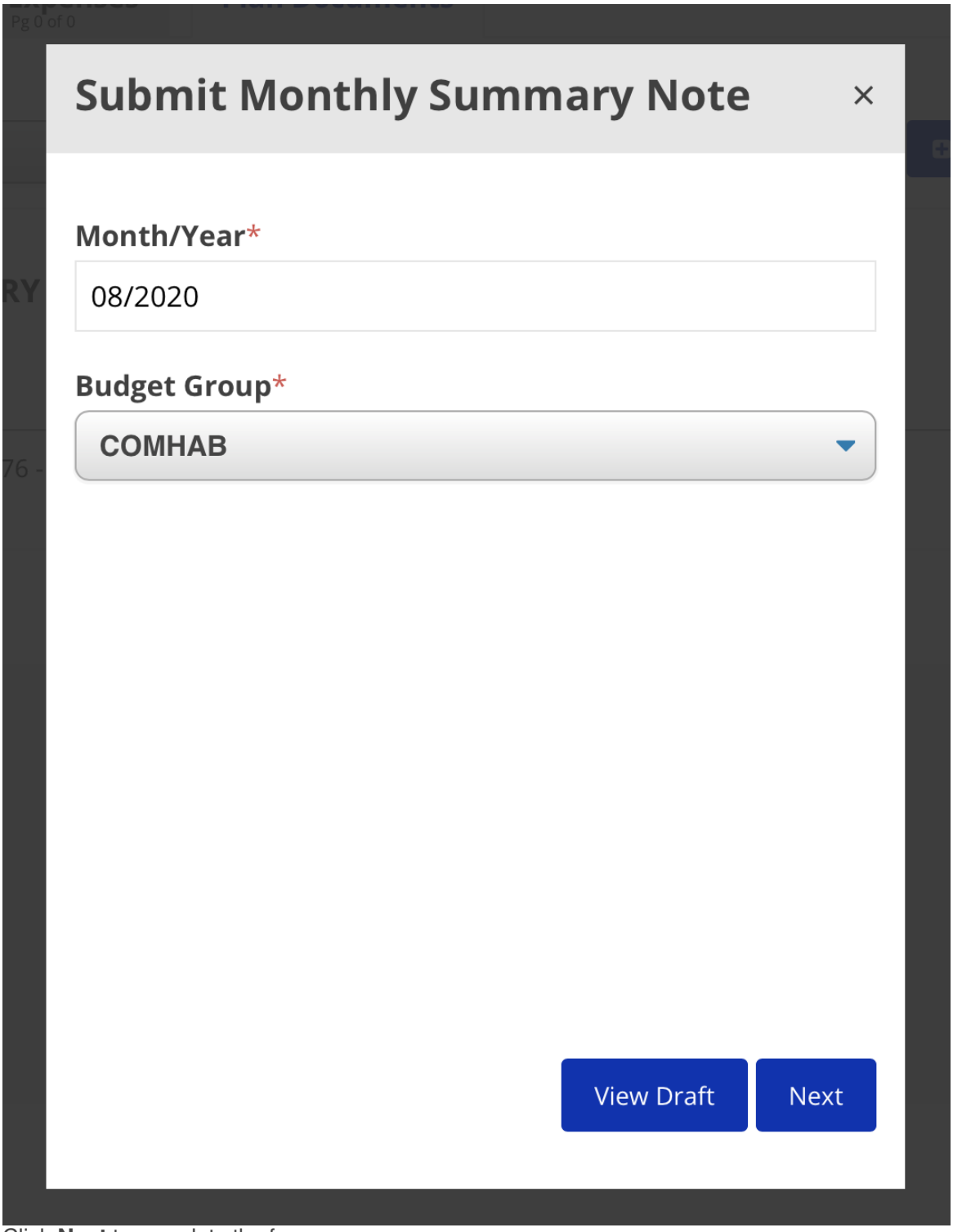
2. Select the **Documents** tab.



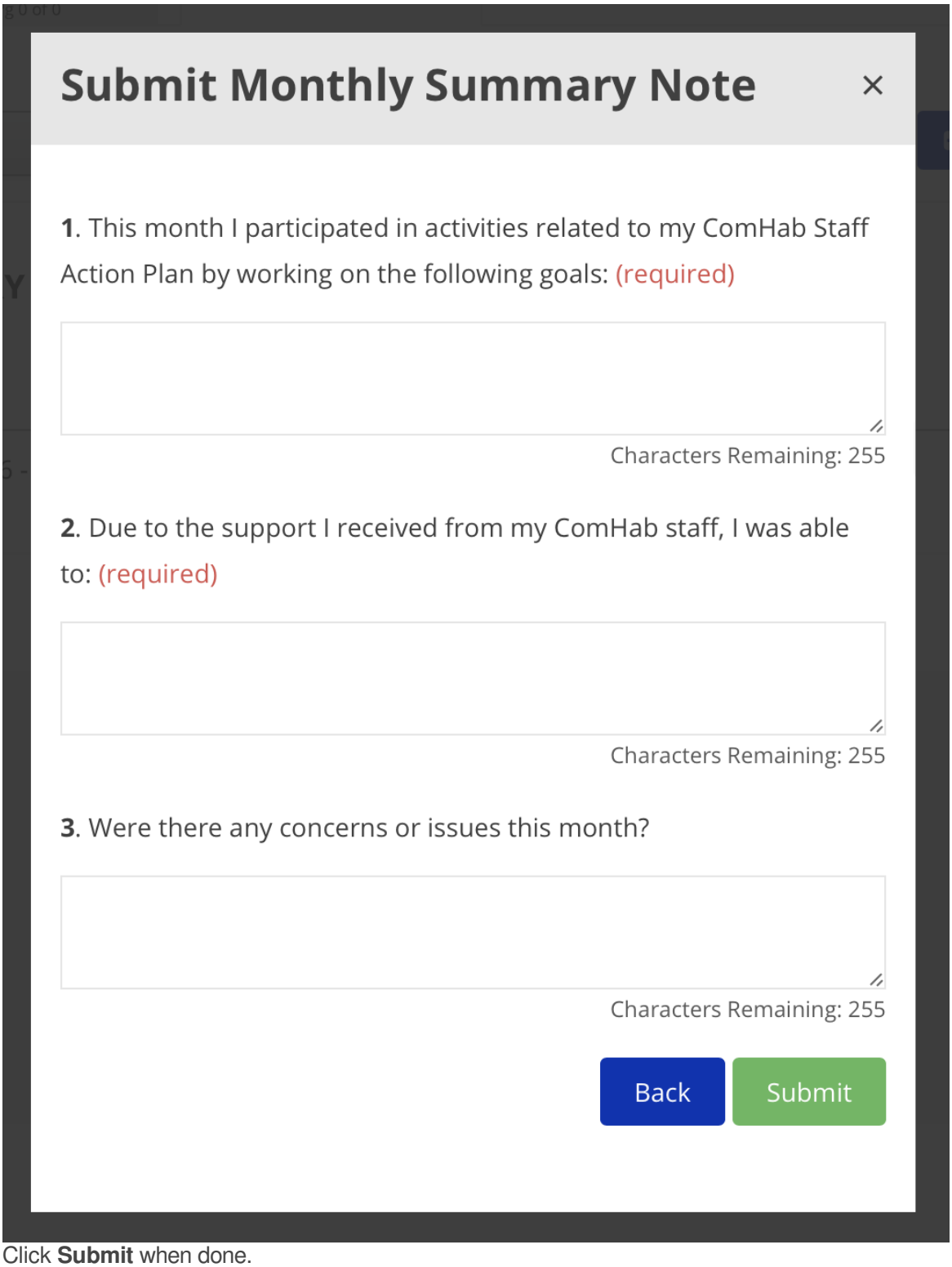
3. Select the **Plan Docs** tab.



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.



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.



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 10/01/26.

Revision #23
★Created 2020-09-22 16:36:18 UTC by Admin
Updated 2026-10-01 14:55:40 UTC by Elizabeth Lukan