Self-Hired Staff Information

4227 Route 50
Saratoga Springs, NY 12866

Main Office: 518-587-3208

Table of Contents

Self-Hired Staff Information

Welcome to AIM!

As a Self-Hired Staff, you will need to know and understand the following information in order to fulfill the requirements of your role:

Meet your AIM Team:

Self-Direction Coordinator

- Self-Direction expectations or updates
- maintain team communications
- assist with management of compliance documents
- eVero assistance

HR Coordinator

- labor policies
- annual staff trainings
- assist with annual DSP Evaluations
- employment benefits
- leave of absence

Bookkeeper

- processing reimbursements
- reimbursement policies
- reimbursement criteria
- communication on reimbursements

AIM Self-Direction Department Supports:

Self-Direction Payroll

- Process payroll
- Time off approval
- Support staff with documentation changes
- Communicate with staff for shift updates/corrections

Self-Direction Support Coordinator

- Additional team resource as needed
- Routine eVero trainings
- new staff/participant support

Self-Direction Leadership

- Self-Direction Lead
    - SD Lead Fiscal
    - SD Lead Coordinator
- Self-Direction Assistant Directors
    - AD of Self-Direction Fiscal
    - Ad of Self-Direction
    - AD of Self-Direction Payroll
- Associate Executive Director

Software:

AIM Self-Direction uses 2 software systems; **eVero and Paylocity**—please note the differences below:

eVero

- Time Keeping: Shift Documentation
- Reimbursement Request
    - Staff Activity Fees
    - Transportation
- Monthly Summaries

Paylocity

- Paystubs
- Tax Documents
- Paid Time Off
- Annual Trainings
- Employee Handbook (Holiday Schedule)
- Paylocity Code: N8726

Additional Resources

EVero Payroll everopayroll@aimservicesinc.org

- o All shifts must be documented real-time via the eVeroMobile App on your electronic device per federal (EVV) Electronic Visit Verification mandates.
- o Any missed shifts or shift corrections must be submitted to EVero Payroll utilizing the below template:

Date: Shift times worked:

Why the punch was not documented via EVV standards:

Physical location of start time (full address):

Where was the clock in location category (select from choices): Participant's Home or Community

Physical location of stop time (full address):

Where was the clock out location category (select from choices): Participant's Home or Community

Staff name:

Individual:

Service: CH / Respite / SEMP

Valued Outcome worked on:

Prompting (Indicate # of choices): Physical, Verbal, Gestural, Supervision

Individual Response (Indicate # of each): Fully Engaged, Partially Engaged, Refused-staff continued to prompt

Service Note:

Providing Services for Community Habilitation:

In order to provide services staff must have the following:

- o Username provider by HR
- o Password set up by Staff
- o EVero App downloaded
- o Start Date from Individual/Rep
- o Paylocity/New Hire Trainings completed within **30 days** of hire

Requirements of Com Hab Staff:

Shift Note:

a detailed note for each shift including the *rule of 3*:

1. Where you Went/What you Did (Covers SAF and Transportation)
2. Staff Support
3. Individual Response

Monthly Summary:

a Medicaid required document that outlines that entire month's successes, challenges, and any other exciting future plans.

Documentation due within the 1st week of the current month for the previous month

Shift Note Example: I went to the grocery store with Joe to get items to prepare lunch. On the way home Joe wanted to stop for ice cream. I assisted Joe with using the correct change when paying for ice cream. *(Where and What covers Mileage and Staff Activity Fee).* When making lunch I helped Joe cut his sandwich in half safely *(Staff Support).* Joe had a great day. He loved his ice cream and lunch *(Individual Response).*

Monthly Summary Example: Joe had a great month. We spent a lot of time in the community. Joe has progressed in his laundry skills. He pays attention to when the washer and dryer are complete and knows to transfer clothing on his own. Joe requires promoting to fold his laundry but has made great progress.

Providing Services for Respite:

In order to provide services staff must have the following:

- o Username provider by HR
- o Password set up by Staff
- o eVero App downloaded
- o Start Date from Individual/Rep
- o Paylocity/New Hire Trainings completed within **30 days** of hire

Pay Date Schedule:

2024 Pay Schedule

Pay Period Starting	Pay Period Ending	Timesheet Approved by	Pay Date
12/10/2023	12/23/2023	12/24/2023	1/5/2024
12/24/2023	1/6/2024	1/7/2024	1/19/2024
1/7/2024	1/20/2024	1/21/2024	2/2/2024
1/21/2024	2/3/2024	2/4/2024	2/16/2024
2/4/2024	2/17/2024	2/18/2024	3/1/2024
2/18/2024	3/2/2024	3/3/2024	3/15/2024
3/3/2024	3/16/2024	3/17/2024	3/29/2024
3/17/2024	3/30/2024	3/31/2024	4/12/2024
3/31/2024	4/13/2024	4/14/2024	4/26/2024
4/14/2024	4/27/2024	4/28/2024	5/10/2024
4/28/2024	5/11/2024	5/12/2024	5/24/2024
5/12/2024	5/25/2024	5/26/2024	6/7/2024
5/26/2024	6/8/2024	6/9/2024	6/21/2024
6/9/2024	6/22/2024	6/23/2024	7/5/2024
6/23/2024	7/6/2024	7/7/2024	7/19/2024
7/7/2024	7/20/2024	7/21/2024	8/2/2024
7/21/2021	8/3/2024	8/4/2024	8/16/2024
8/4/2024	8/17/2024	8/18/2024	8/30/2024
8/18/2024	8/31/2024	9/1/2024	9/13/2024
9/1/2024	9/14/2024	9/15/2024	9/27/2024
9/15/2024	9/28/2024	9/29/2024	10/11/2024
9/29/2024	10/12/2024	10/13/2024	10/25/2024
10/13/2024	10/26/2024	10/27/2024	11/8/2024
10/27/2024	11/9/2024	11/10/2024	11/22/2023
11/10/2024	11/23/2024	11/24/2024	12/6/2023
11/24/2024	12/7/2024	12/8/2024	12/20/2024
12/8/2024	12/21/2024	12/22/2024	1/3/2025
12/22/2024	1/4/2025	1/5/2025	1/17/2025

- Staff are required to enter timesheets via the eVero app
- Individual/Family review and approval of timesheets are due every Sunday by 12PM
- Timesheets may be due early due to extenuating circumstances (i.e. Holidays)
- Submit any late time to eVeropayroll@aimservicesinc.org

2024 AIM Services Self-Hired DSP Holidays

1/1/2024	New Year's Day
1/15/2024	Martin Luther King Jr. Day
2/19/2024	Presidents' Day
5/27/2024	Memorial Day
7/4/2024	Independence Day
9/2/2024	Labor Day
10/14/2024	Indigenous Peoples' Day/Columbus Day
11/11/2024	Veteran's Day
11/28/2024	Thanksgiving Day
12/25/2024	Christmas Day

- Full Time DSPs' are entitled to 8 hours of unworked holiday pay (dates outlined above)
- Part Time and Per Diem DSPs' are entitled to double time pay up to 8 hours of worked time on a holiday (dates outlined above)

Reimbursement Requests:

If Staff Activity Fees or Transportation are available to you through the budget (this is established by the participant):

- **Reimbursement Policy Dates—**
  - Submitted by the 1st → paid out by the **16th of the month (or next business day)**
  - Submitted by the 15th → paid out by the **31st of the following month (or the last business day of the month)**
  - Entered directly on the **eVeroMobile App**
  - Reimbursement Request Criteria;
    - Staff Activity Fee (proof of payment, itemized receipt, justification in note)
    - Transportation (documentation of shift and justification in note)
      - reimbursed at the current federal mileage rate

Please reach out to your team for the following:

Self-Direction Coordinator—
- eVero Resources
- Payroll Needs
- Com Hab Monthly Summaries

HR Coordinator—
- Paylocity Information
- Annual Paylocity Trainings
- Payroll Schedule
- Holiday Schedule

Bookkeeper—
- Staff Activity Fees (SAF) questions or rejections
- Mileage questions or rejections
- Reimbursement Policies

Visual Shortcuts:

eVero download is available on the Apple App Store/Google Play Store titled **'eVeroMobile'**

Clock in/Out Com Hab and Respite
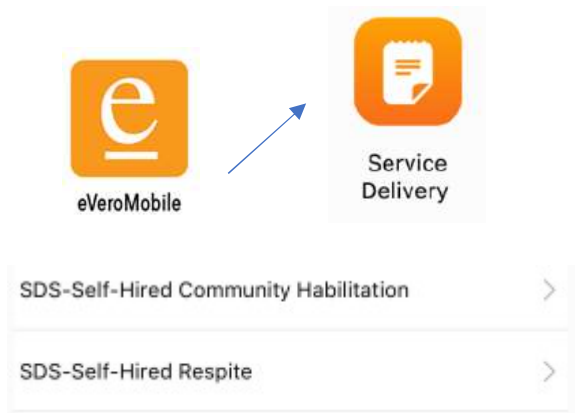
Monthly Summary
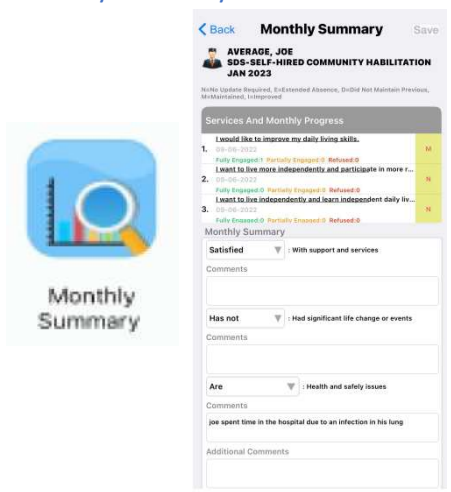
Staff Activity Fee
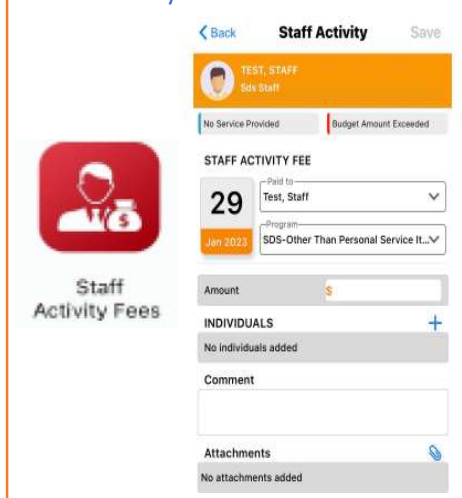
Mileage
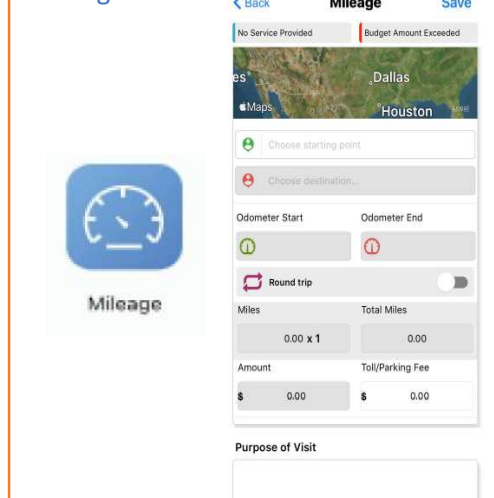
Clock In/Out Self-Hired Respite
eVeroMobile App

*Respite- Respite is a service that provides relief to unpaid caregivers who are responsible for the primary care and support of a person with a developmental disability

Direct Service- For scheduled shifts within 24 hours of the same day.
Example: Staff clock in on *day 1 at 7pm* and clock out on *day 1 at 10pm*

DirectService-Overnight- For scheduled shifts to begin within a 24-hour day and end the following day.
Example: Staff clock in on *day 1 at 7pm and clock out on day 2 at 5am*

*eVeroMobile app- timekeeping app utilized by staff when providing NYS Medicaid supports

*Staff Attendance- All shifts must be documented real-time by staff via the eVeroMobile App on an electronic device per federal (EVV) Electronic Visit Verification mandates. Any missed shifts or shift corrections must be submitted by staff to eVero Payroll at everopayroll@aimservicesinc.org utilizing the manual payroll template
- Please reach out to SD Team if the staff needs a manual payroll template
- Submissions must be timely in order to avoid delays in payment
- Manual Payroll Templates must be submitted via AIM Self-Direction
  https://www.aimservicesinc.org/self-direction/

*Overtime Policy: Overtime must be requested and confirmed by AIM team to ensure sufficient support in the budget prior to staff providing services (overtime is billed at time and a half)
- Overtime cannot be scheduled using the AIM Notice of Employment form

*eVero Payroll (everopayroll@aimservicesinc.org) - Assists with processing payroll, time off approval, and communications with staff on shift updates/corrections in accordance to AIM Payroll Schedule

AIM SERVICES, INC.
The power of potential

1. Select 'Click Here to Log In' and proceed to 'eVero Sign In' screen
2. Enter username and password; Select 'Sign In'

eVeroMobile

Click Here to Log In

By logging in you accept and agree to eVero's Terms of Service and Privacy Policy. For help email support@evero.com or call (516)345-1460.

Version 5.7

eVero
CORPORATION

Sign in to continue

Username   Forgot your username?

Password   Forgot your password?

Sign In

Forgot your login information?

eVero
CORPORATION

Sign in to continue

Username   Forgot your username?

Password   Forgot your password?

Sign In

Forgot your login information?

Sign in with your Agency Code

You are accessing a private Cloud Service. This Cloud Service is for the exclusive use of authorized users of the eVero Platform™. Unauthorized use of the eVero Platform™ is prohibited and is subject to criminal and civil penalties.

Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

3. Select 'Service Delivery' (orange icon top left)
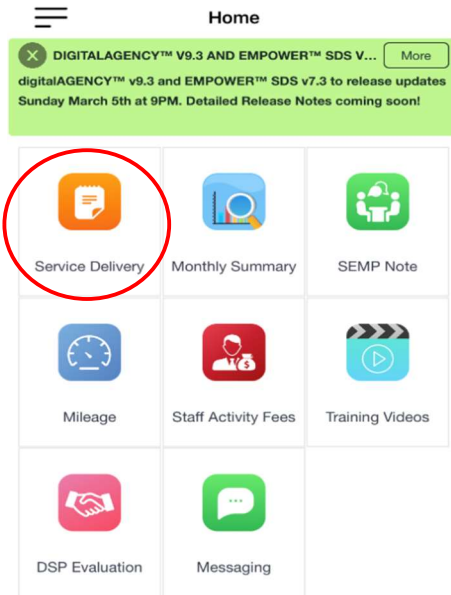
4. Select 'SDS-Self-Hired Respite (grey arrow) and proceed to Punch in from the 'Attention Screen' by selecting 'OK'
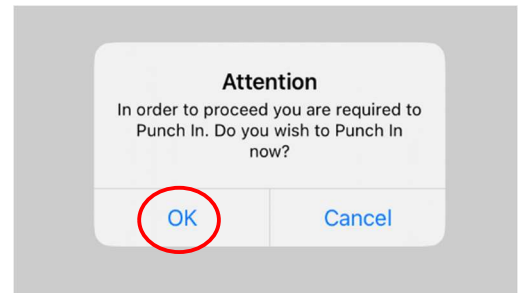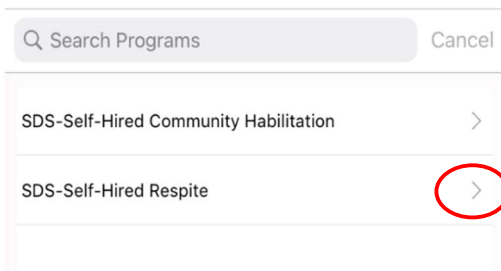
5. Select 'Department' (grey arrow); select 'Self-Hired Respite' from dropdown
6. Select 'Reason' (grey arrow); select 'Direct-Service' or 'DirectService-Overnight' from dropdown
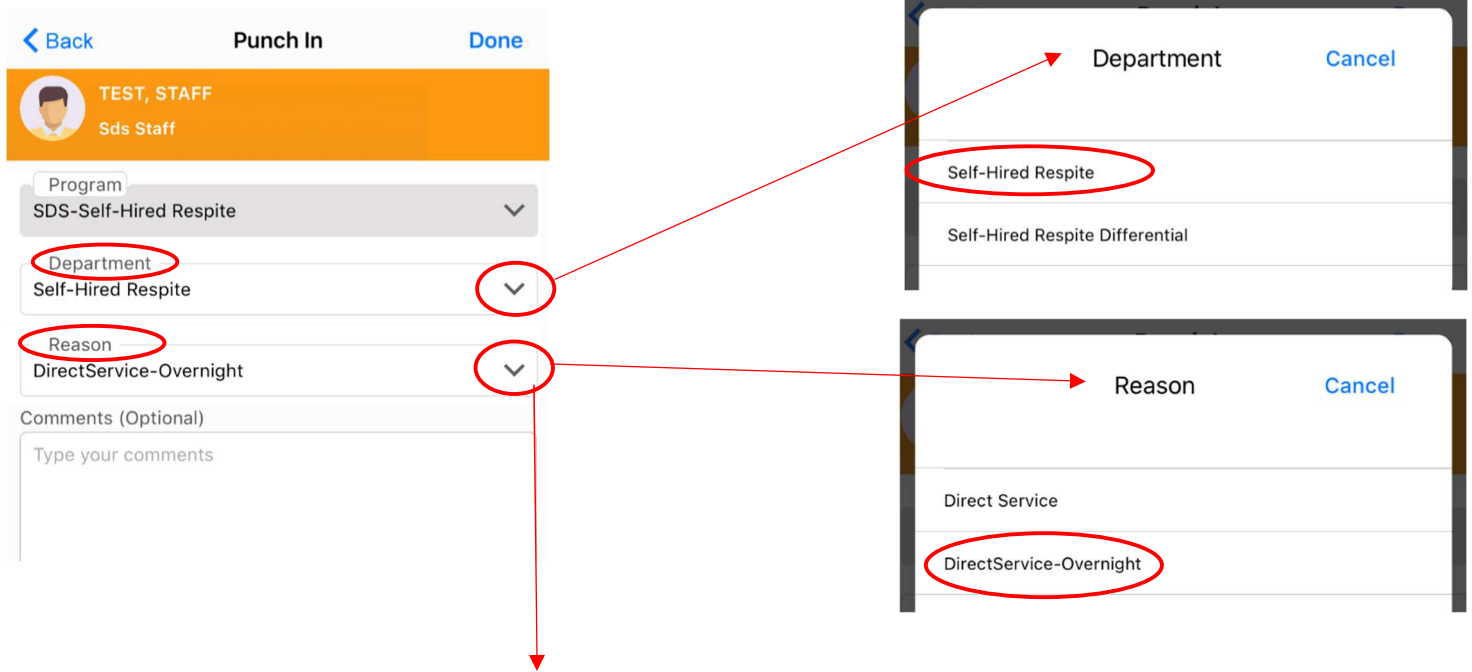
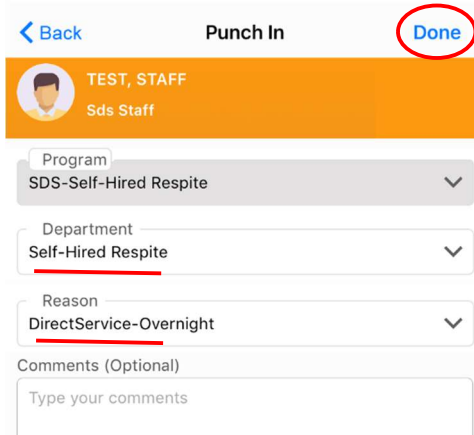Note for 'Reason' selection:

Direct Service-
Select this option for scheduled shifts within 24 hours of the same day. Example: Staff clock in on *day 1 at 7pm* and clock out on *day 1 at 10pm*

DirectService-Overnight-
Select this option for scheduled shifts that begin within a 24-hour day and end the following day.
Example: Staff clock in on *day 1 at 7pm and clock out on day 2 at 5am*

7. Verify information is correct on 'Punch In' screen (comments are optional); select 'Done' (upper right-hand corner)

8. Select Individual by clicking empty checkbox (selection indicated by orange checkmark); Select 'Done' (upper right-hand corner)

9. Select 'Mode-of-Support' (upper right-hand corner); Select 'Face-to-Face' supports from dropdown. Select 'Done' (upper right-hand corner) to return to 'Individuals' screen
10. On 'Individuals' screen, select 'Done' to proceed to 'Session'

11. Press 'Start' (green play icon) to proceed to session and begin Face-to-Face supports (indicated by 'Start Time' stamp)

12. Stop session by selecting 'Stop' (indicated by a red circle)
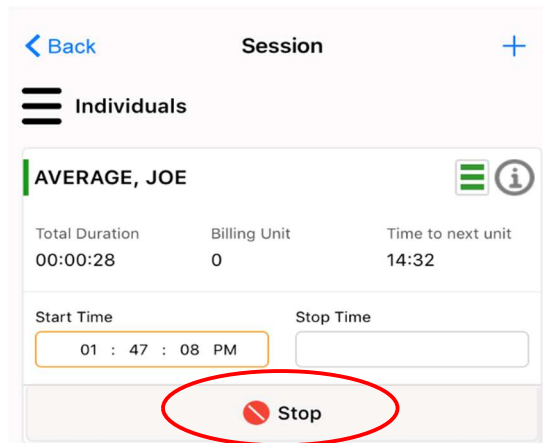
13. 'Attention Screen' will verify if you wish to clock out to end current session; select 'Yes' to end current session (indicated by 'Stop Time' stamp)
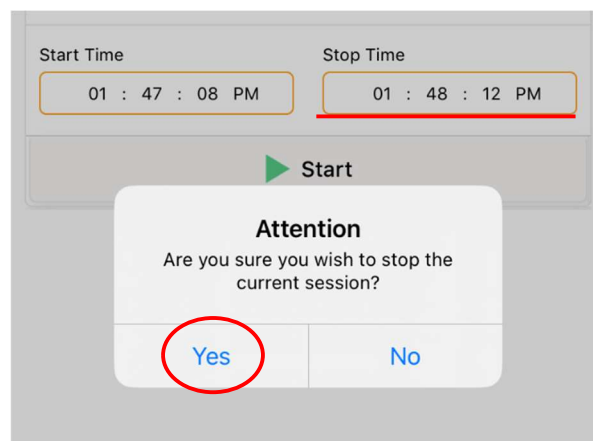
14. Under 'Session Summary' screen this will show a report of service location, date, times, and total duration of shift

Left screen:

‹ Back   **Session Summary**

AVERAGE, JOE
SDS-Self-Hired Respite

Service Location Details

Community   ✎
4227 NY-50, Saratoga Springs, NY, 12866
◎ Start 01:47 PM

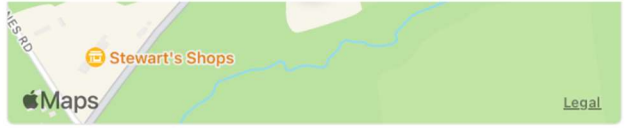**Community**   ✎
4227 NY-50, Saratoga Springs, NY, 12866
◎ Stop 01:48 PM

422 NY-50

 Stewart's Shops
 Maps   Legal

Service Detail   **02-14-2023**

Service Given by   Total Duration
Test, Staff   **0 hrs 1 mins**

Start Time   Stop Time
01 : 47 : PM   01 : 48 : PM

Right screen:

‹ Back   **Session Summary**

AVERAGE, JOE
SDS-Self-Hired Respite

 Stewart's Shops
 Maps   Legal

Service Detail   **02-14-2023**

Service Given by   Total Duration
Test, Staff   **0 hrs 1 mins**

Start Time   Stop Time
01 : 47 : PM   01 : 48 : PM

Services
No service added

Signature
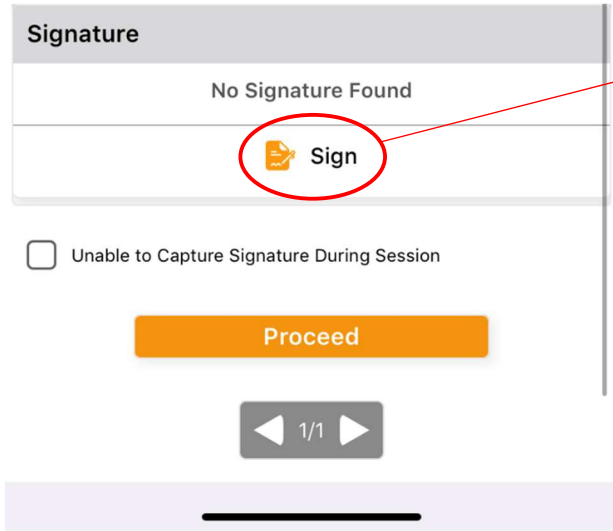
No Signature Found

📝 **Sign**

☐ Unable to Capture Signature During Session

Proceed

17. Individuals/Reps may require a signature after each shift; to sign select 'Sign' (indicated by an orange paper at the bottom middle of screen)

18. Signature screen will prompt the type of signature, name, and title of signer; sign by using finger on the signature pad; select 'Done'
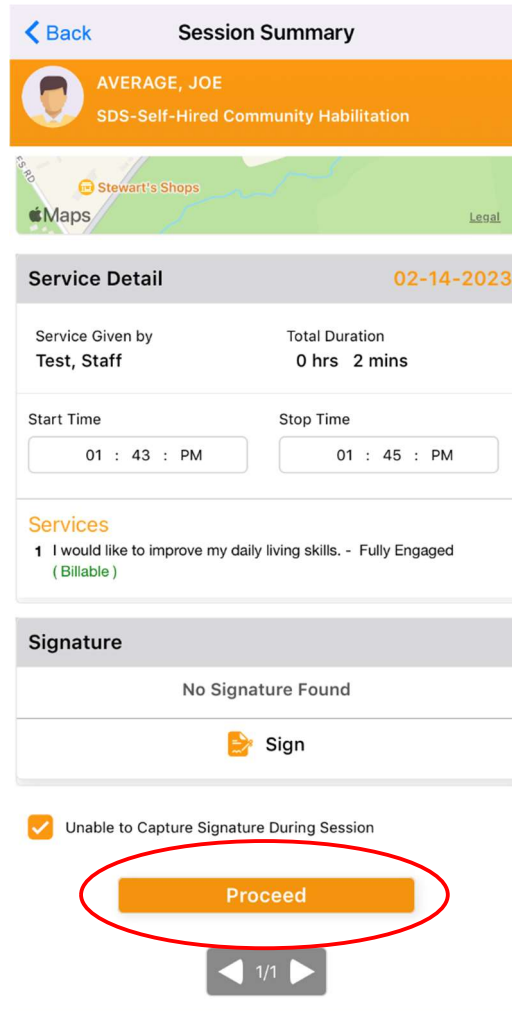

OR

19. If Individual/Rep is unable to sign after a shift is complete, select the empty checkbox 'Unable to Capture Signature During Session' (selection indicated by orange checkmark)
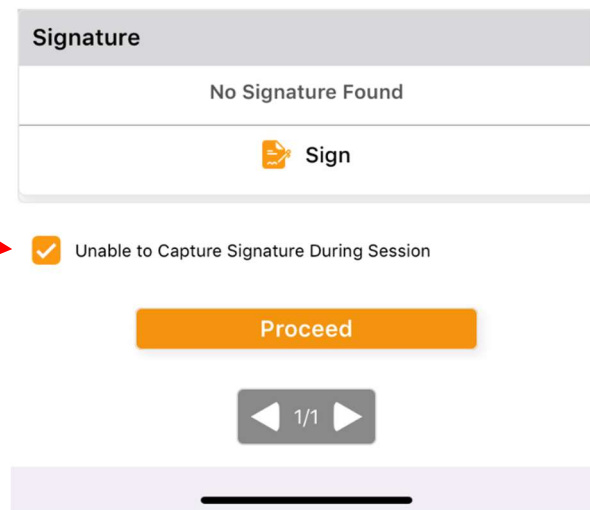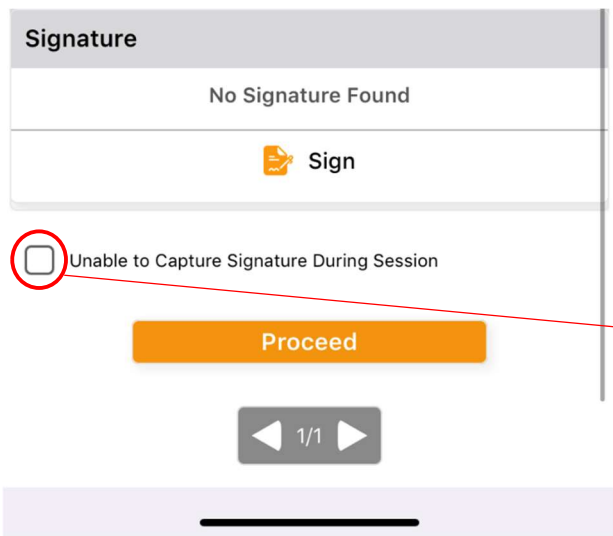
20. Select 'Proceed' (orange button at bottom middle of screen) to successfully punch out of the program

21. 'Attention' screen will indicate that you have successfully punched out from the program
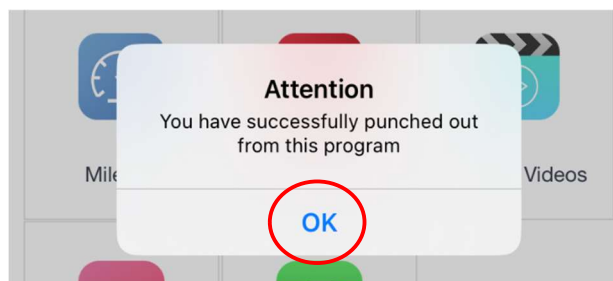
Clock In/Out <u>Self-Hired Community Habilitation</u>

eVeroMobile App

*<u>Community Habilitation-</u> a service delivered in the community to facilitate inclusion, integration, skill and relationship building

*<u>eVeroMobile app-</u> timekeeping app utilized by staff when providing NYS Medicaid supports

*<u>Staff Attendance-</u> All shifts must be documented real-time by staff via the eVeroMobile App on an electronic device per federal (EVV) Electronic Visit Verification mandates. Any missed shifts or shift corrections must be submitted by staff to eVero Payroll at everopayroll@aimservicesinc.org utilizing the manual payroll template

- Please reach out to SD Team if the staff needs a manual payroll template
- Submissions must be timely in order to avoid delays in payment
- Manual Payroll Templates must be submitted via AIM Self-Direction https://www.aimservicesinc.org/self-direction/

*<u>Overtime Policy:</u> Overtime must be requested and confirmed by AIM team to ensure sufficient support in the budget prior to staff providing services (overtime is billed at time and a half)

- Overtime cannot be scheduled using the AIM Notice of Employment form

*<u>eVero Payroll (everopayroll@aimservicesinc.org) -</u> Assists with processing payroll, time off approval, and communications with staff on shift updates/corrections in accordance to AIM Payroll Schedule

Clock In/Out Self-Hired Community Habilitation

eVeroMobile App

Quality Notes- staff will enter daily shift notes when providing Community Habilitation services. Notes should include important details of the supports provided during that shift. This should directly relate to the individual's goals/valued outcomes as indicated in the 'Methods' Section of the eVeroMobile app (NYS Medicaid requirement for quality documentation)
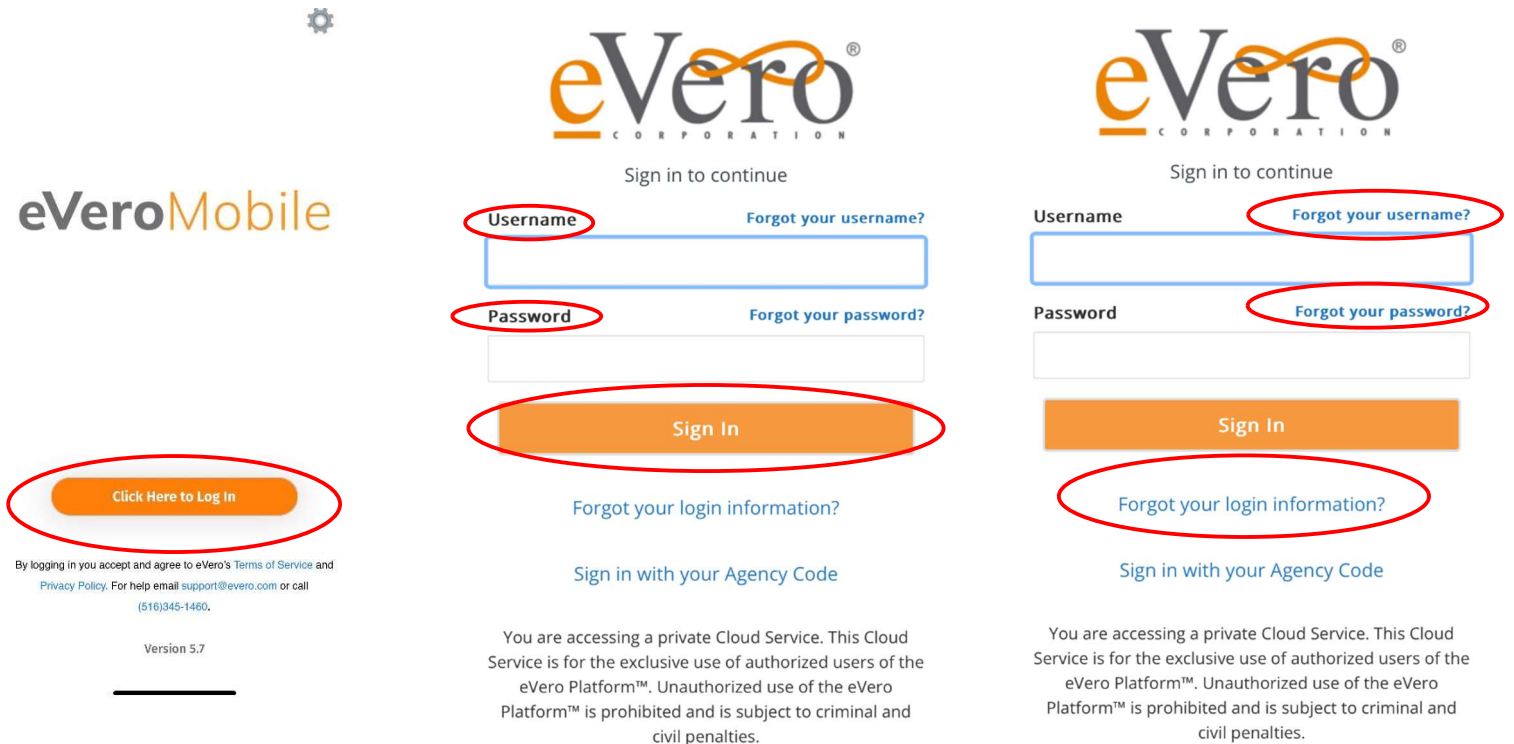

Shift Note Rule of 3:

1. *Where you Went/What you Did (Covers SAF and Transportation)*
2. *Staff Support*
3. *Individual Response*

Example Shift Note:
I went to the grocery store with Joe to get items to prepare lunch. On the way home Joe wanted to stop for ice cream. I assisted Joe with using the correct change when paying for ice cream. *(Where and What covers Mileage and Staff Activity Fee).* When making lunch I helped Joe cut his sandwich in half safely *(Staff Support).* Joe had a great day. He loved his ice cream and lunch *(Individual Response)*
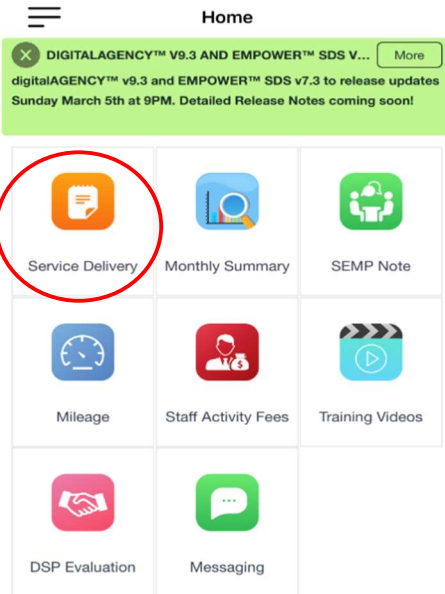
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1. Select 'Click Here to Log In' and proceed to 'eVero Sign In' screen
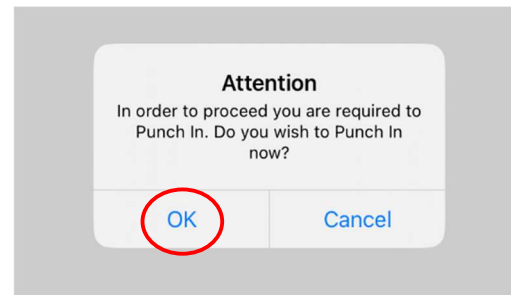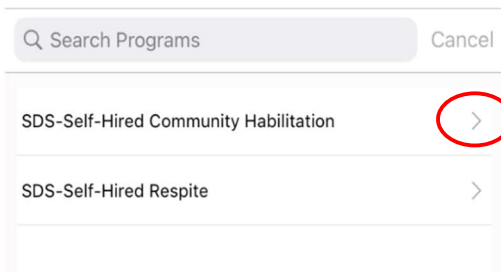2. Enter username and password; Select 'Sign In'

Forgotten User/Password: Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

3. Select 'Service Delivery' (orange icon top left)

Service Delivery

4. Select 'SDS-Self-Hired Community Habilitation (grey arrow) and proceed to Punch in from the 'Attention Screen' by selecting 'OK'

5. Select 'Department' (grey arrow); select 'Self-Hired Comm-Hab' from dropdown
6. Select 'Reason' (grey arrow); select 'Direct-Service' from dropdown

7. Verify information is correct on 'Punch In' screen (comments are optional); select 'Done' (upper right-hand corner)

8. Select Individual by clicking empty checkbox (selection indicated by orange checkmark); Select 'Done' (upper right-hand corner)

9. Select 'Mode-of-Support' (upper right-hand corner); Select 'Face-to-Face' supports from dropdown. Select 'Done' (upper right-hand corner) to return to 'Individuals' screen

10. On 'Individuals' screen, select 'Done' to proceed to 'Session'

11. Press 'Start' (green play icon) to proceed to session and begin Face-to-Face supports (indicated by 'Start Time' stamp)
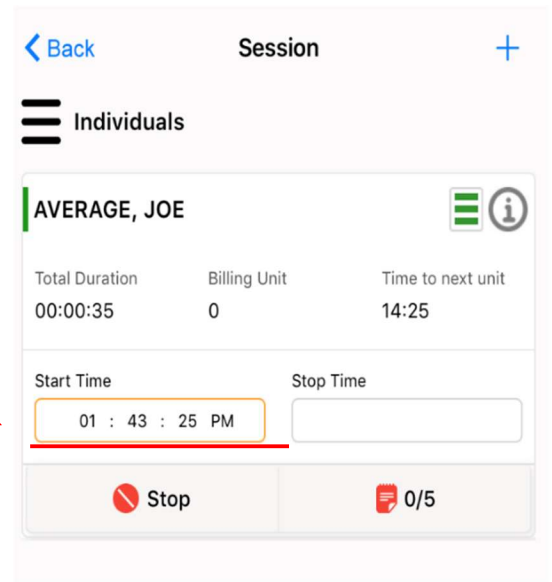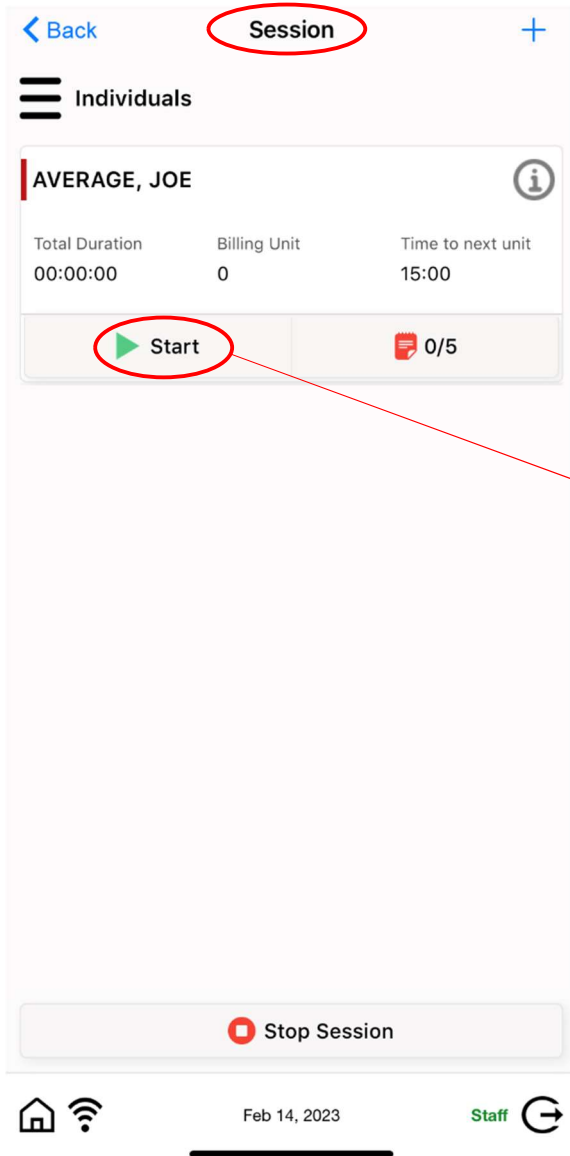
14. Select orange notepad (indicated by '0/5') to open 'Services' page which will expand **all current** goals
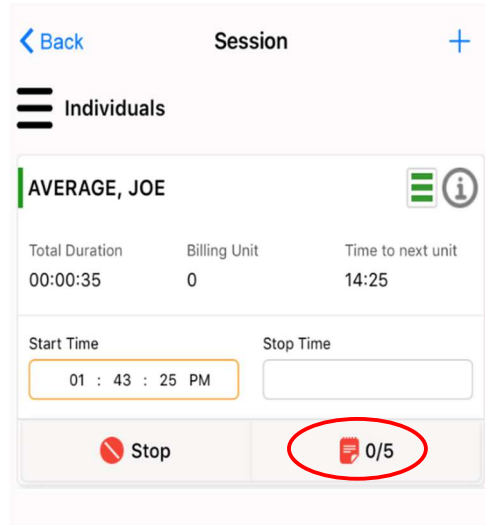
15. Select grey arrow (right-hand side of screen) to expand and review **one** goal
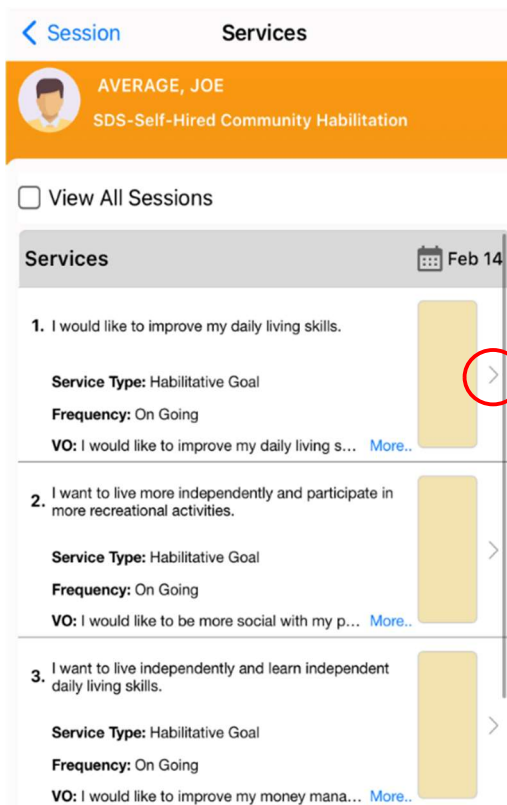
16. Review 'Methods' section of selected goal (this is how staff will assist/support individual)
17. Under 'Staff Support' select at least one, Physical, Verbal, Gestural, Supervision (grey arrow); indicate # of prompts for that support and select 'Done'
18. Select 'Individual Response' (grey arrow); choose from dropdown and select 'Done'
19. Select 'Service Location' as either **Home** or **Community** and select 'Done'
20. Select 'Comments' to enter shift note and select 'Done'

Note: review methods for all goals by using the grey set of arrows (top middle of screen)

Staff Supports   Done

1	2	3
4	5	6
7	8	9
	Other	

Cancel

< Services   ◄ 1/5 ►   Save

AVERAGE, JOE
SDS-Self-Hired Community Habilitation

SERVICE

I would like to improve my daily living skills.

VALUED OUTCOME

I would like to improve my daily living skills.

METHODS

Staff will assist with skills in the kitchen to ensure safety and daily living skills like laundry and cleaning.

Staff Support

Physical	Select >
Verbal	Select >
Gestural	Select >
Supervision	Select >

Individual Response

| Select | ⌄ |

Service Location

| Select | ⌄ |
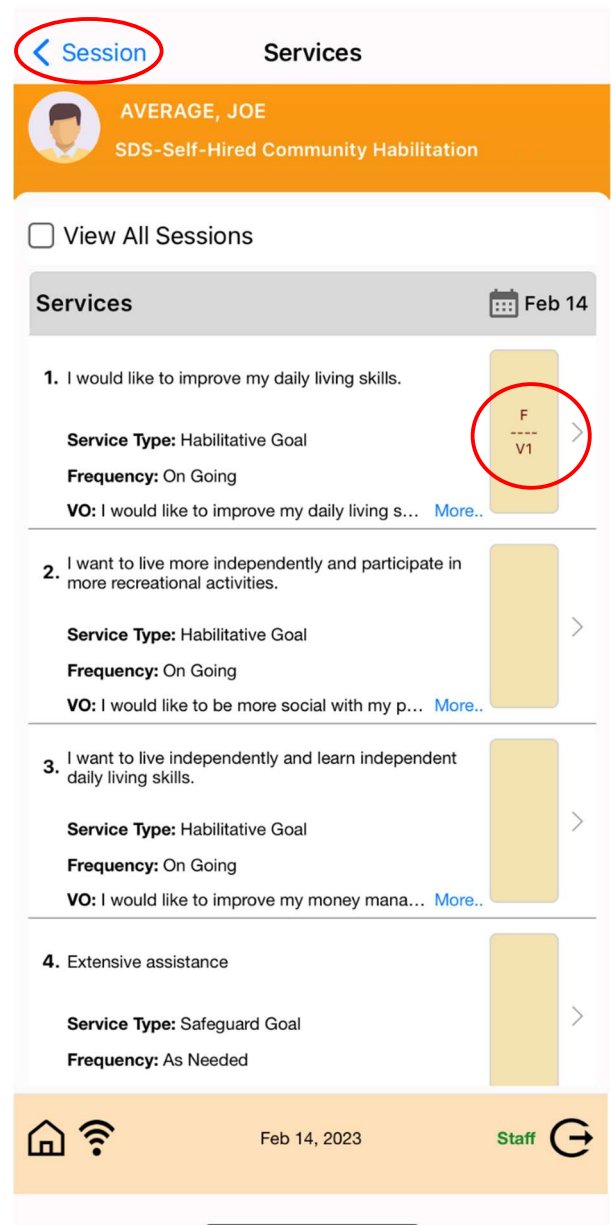
Enter service location description

Comments

Individuals Response   Cancel

Fully Engaged

No Response Required

Partially Engaged

Personal Safeguard

Refused, Staff Cont. To Prompt

Service Location   Done

At Home

In the Community

Other

Cancel

Cancel   Comments   Done

Shift Note Here

*Reminder:

Rule of 3:
-Where you went and what you did
(covers reimbursement requests)
-Staff Support
-Individual Response

* Shift Note Example:
I went to the grocery store with Joe to get items to prepare lunch. On the way home Joe wanted to stop for ice cream. I assisted Joe with using the correct change when paying for ice cream. *(Where and What covers Mileage and Staff Activity Fee).* When making lunch I helped Joe cut his sandwich in half safely *(Staff Support).* Joe had a great day. He loved his ice cream and lunch *(Individual Response).*

21. Verify all information entered on screen is correct and select 'Save' (top right-hand corner)
22. On 'Services' screen documentation will be recorded in the yellow box next to the selected goal
23. Select 'Session' (upper left-hand corner) to return to 'Session' screen

24. 'Session' page will reflect 1/5 goals documented on (indicated by green notepad with 1/5)
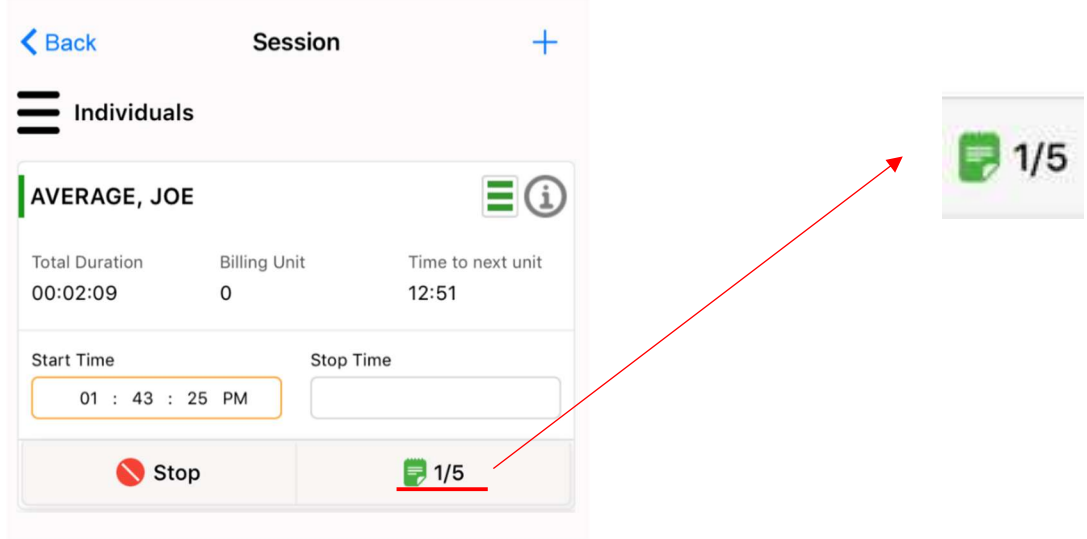
25. Stop session by selecting 'Stop' (indicated by a red circle)
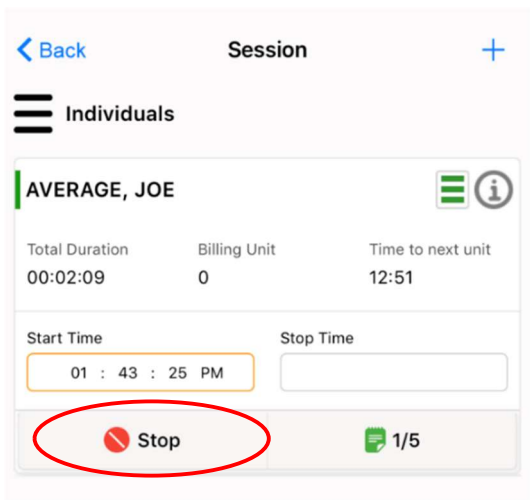
26. 'Attention Screen' will verify if you wish to clock out to end current session; select 'Yes' to end current session (indicated by 'Stop Time' stamp)
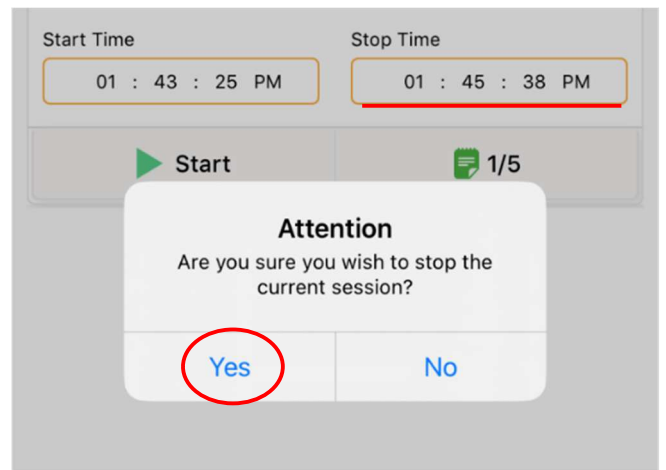
27. Under 'Session Summary' screen this will show a report of service location, date, times, total duration of shift, and services billed

R. Nov-23
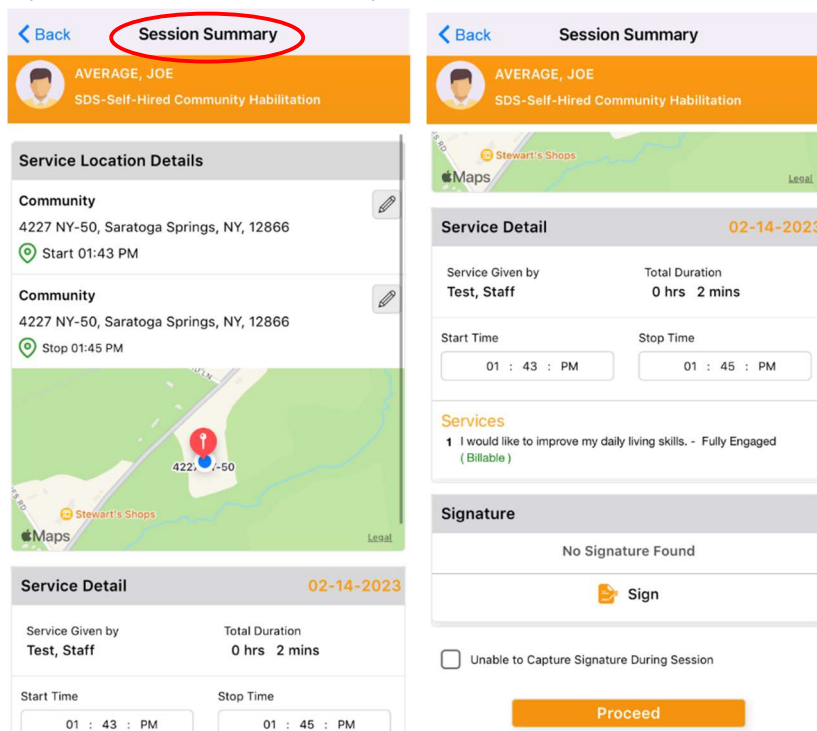
28. Individuals/Reps may require a signature after each shift; to sign select 'Sign' (indicated by an orange paper at the bottom middle of screen)

29. Signature screen will prompt the type of signature, name, and title of signer; sign by using finger on the signature pad; select 'Done'

Signature

No Signature Found

Sign

☐ Unable to Capture Signature During Session

Proceed

◀ 1/1 ▶

OR

< Back   Signature   Done

Signature Type

-- Select -- ▼

Name

Title

Use Finger to Sign Here

Remove Signature

30. If Individual/Rep is unable to sign after a shift is complete, select the empty checkbox 'Unable to Capture Signature During Session' (selection indicated by orange checkmark)

Signature

No Signature Found

Sign

☐ Unable to Capture Signature During Session

Proceed

◀ 1/1 ▶

Signature

No Signature Found

Sign

☑ Unable to Capture Signature During Session

Proceed

◀ 1/1 ▶
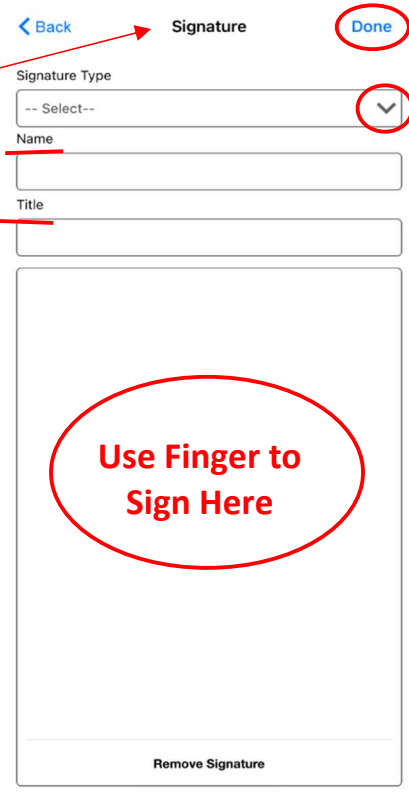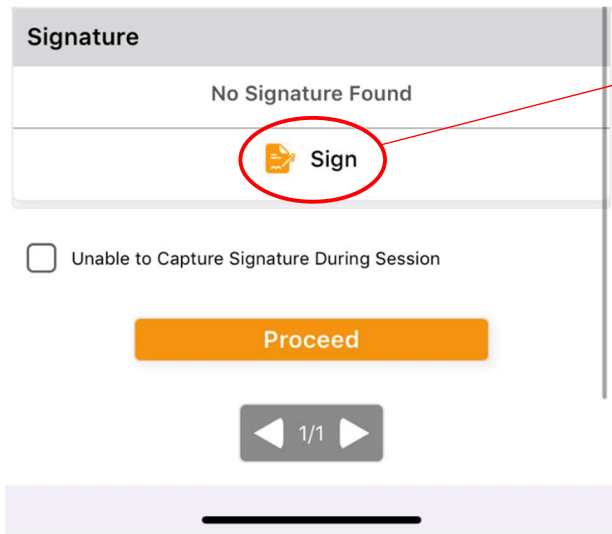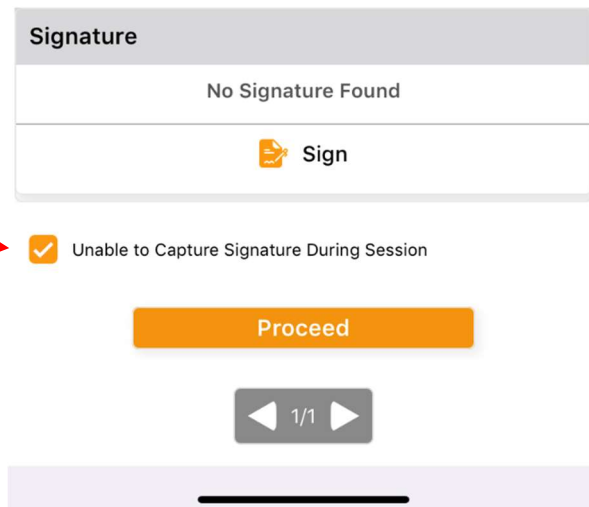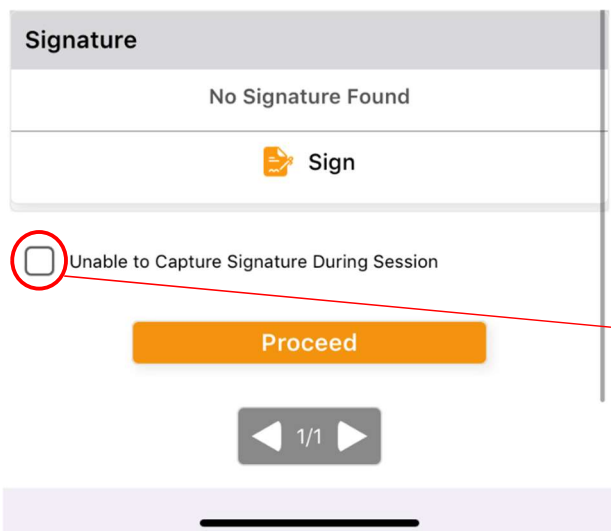
31. Select 'Proceed' (orange button at bottom middle of screen) to successfully punch out of the program
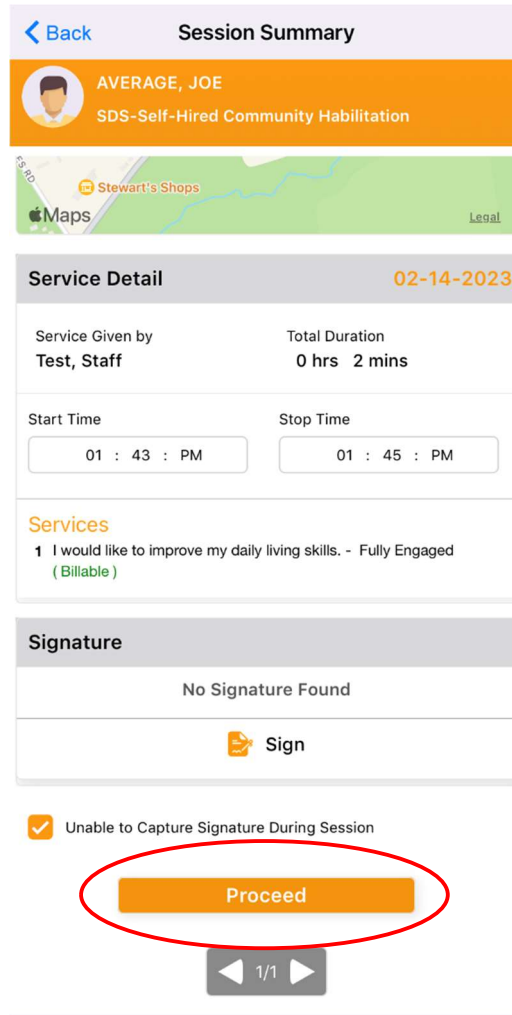
32. 'Attention' screen will indicate that you have successfully punched out from the program

Self-Hired Community Habilitation Billable Note Example
eVeroMobile App

*Community Habilitation- a service delivered in the community (i.e., non-certified settings) to facilitate inclusion, integration, and relationship building

*Quality Notes- staff will enter daily shift notes when providing Community Habilitation services. Notes should include important details of the supports provided during that shift. This should directly relate to the individual's goals/valued outcomes as indicated in the 'Methods' Section of the eVeroMobile app (NYS Medicaid requirement for quality documentation)

*eVeroMobile app- timekeeping app utilized by staff when providing NYS Medicaid supports

Example includes: Assigned Goal, Staff Methods/Supports, an Example of a Billable Note, and Staff Tips (to ensure documentation and reimbursements entered (if available to staff) can be supported)

Staff Action Plan:

Assigned Goal:
I would Like to Improve my Daily Living Skills (G)

Staff Methods:
Staff will assist with skills in the kitchen to ensure safety and daily living skills like laundry and cleaning

---

Example Shift Note:

I went to the grocery store with Joe to get items to prepare lunch. On the way home Joe wanted to stop for ice cream. I assisted Joe with using the correct change when paying for ice cream. *(Where and What covers Mileage and Staff Activity Fee).* When making lunch I helped Joe cut his sandwich in half safely *(Staff Support).* Joe had a great day. He loved his ice cream and lunch *(Individual Response)*

Shift Note Rule of 3:

4. *Where you Went/What you Did (Covers SAF and Transportation)*
5. *Staff Support*
6. *Individual Response*

Entering a Monthly Summary Com Hab
eVeroMobile App

*Monthly Summary is a Medicaid required document that is encompassed in a Self-Hired Community Habilitation staff's responsibility. The monthly summary should be a short paragraph outlining that month's successes, challenges, and any exciting future plans.
*eVeroMobile app- app utilized by staff to document services when providing NYS Medicaid supports

Monthly Summary due within the first week of the month – as communicated by Self-Directed team and eVero Communication

Example of a monthly summary note:
Joe had a great month. We spent a lot of time in the community. Joe has progressed in his laundry skills. He pays attention to when the washer and dryer are complete and knows to transfer clothing on his own. Joe requires promoting to fold his laundry but has made great progress.

1. Log into the eVero application and select the blue 'Monthly Summary' tile.

2. Select the individual's name

Home   **Individuals**

SDS-SELF-HIRED COMMUNITY HABILITATION
AIM SERVICES INC

🔍

📄 Draft   📄 Signed
📄 Approved   📄 Sign-Processing
📄 Approve-Processing   📄 View Document

TEST, STAFF   DEC   JAN   FEB

AVERAGE, JOE   📄 📄 📄 ⓘ

3. Select the month being completed (grey arrow)

Individuals Monthly Summaries

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITA...

📄 Draft   📄 Signed
📄 Approved   📄 Sign-Processing
📄 Approve-Processing   📄 View Document

Month

📄 Feb 2023
Plan Effective Date : 09-06-2022
Signed By   :   >
Approved By :

📄 Jan 2023
Plan Effective Date : 09-06-2022
Signed By   :   >
Approved By :

📄 Jan 2023
Plan Effective Date : 09-06-2022
Signed By   :   >
Approved By :

📄 Dec 2022   📄 PDF
Plan Effective Date : 09-06-2022
Signed By   : Test, Staff 01-18-2023 5:32 PM   >
Approved By : Baxter, Suzanne 01-25-2023 6:00 PM

📄 Dec 2022   📄 PDF
Plan Effective Date : 09-06-2022
Signed By   : Test, Staff 01-18-2023 5:32 PM   >
Approved By : Baxter, Suzanne 01-25-2023 6:00 PM

4. Select 'Services and Monthly Progress' (yellow box) to open 'Service Summary' page

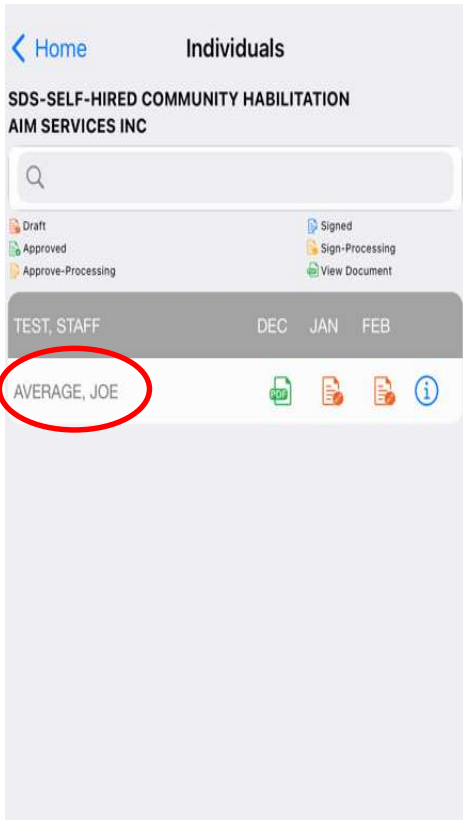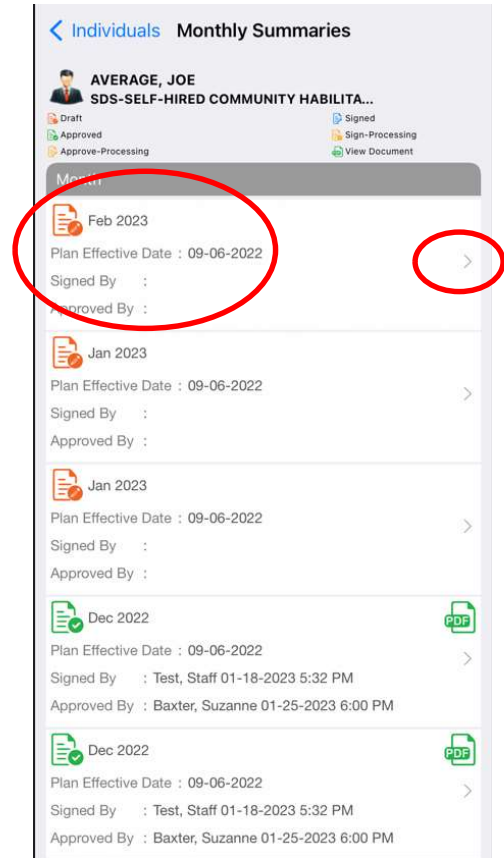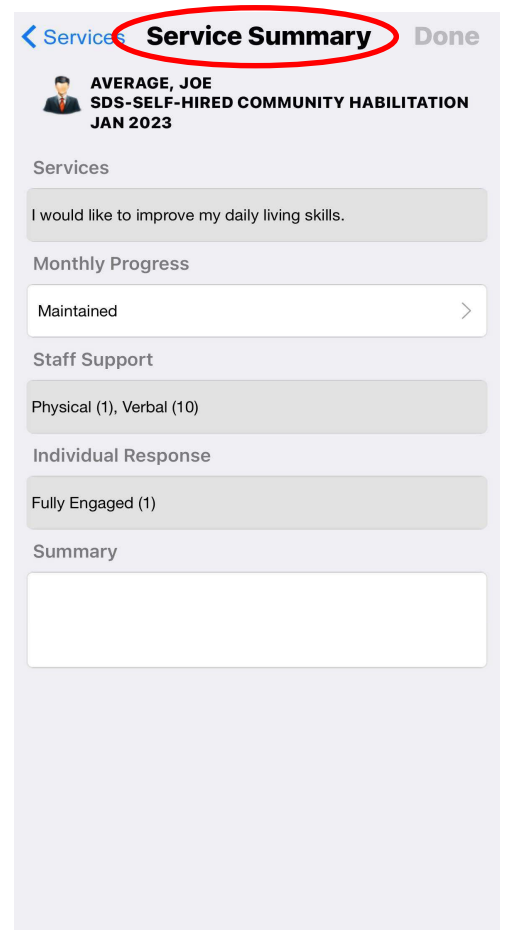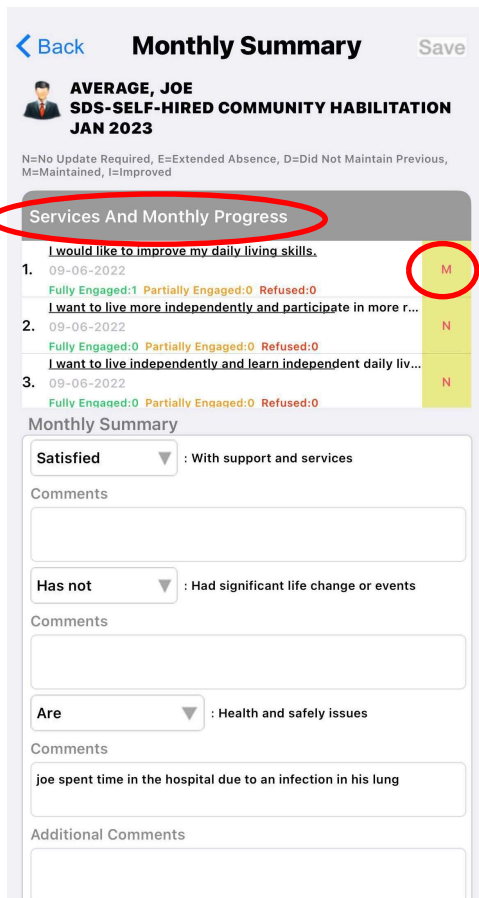**< Back   Monthly Summary   Save**

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

N=No Update Required, E=Extended Absence, D=Did Not Maintain Previous,
M=Maintained, I=Improved

Services And Monthly Progress

I would like to improve my daily living skills.
1.   09-06-2022   M
Fully Engaged:1 Partially Engaged:0 Refused:0
I want to live more independently and participate in more r...
2.   09-06-2022   N
Fully Engaged:0 Partially Engaged:0 Refused:0
I want to live independently and learn independent daily liv...
3.   09-06-2022   N
Fully Engaged:0 Partially Engaged:0 Refused:0

Monthly Summary

Satisfied ▼ : With support and services
Comments
[   ]

Has not ▼ : Had significant life change or events
Comments
[   ]

Are ▼ : Health and safely issues
Comments
[joe spent time in the hospital due to an infection in his lung]

Additional Comments
[   ]

< Services   Service Summary   Done

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

Services

I would like to improve my daily living skills.

Monthly Progress

Maintained   >

Staff Support

Physical (1), Verbal (10)

Individual Response

Fully Engaged (1)

Summary

[   ]

5. Select 'Monthly Progress' (grey arrow)

6. Select update from dropdown and select 'done'

Services **Service Summary** Done

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

Services

I would like to improve my daily living skills

Monthly Progress

Maintained

Staff Support

Physical (1), Verbal (10)

Individual Response

Fully Engaged (1)

Summary

Services **Done**

MONTHLY PROGRESS

No Update Required (N)

Extended Absence (E)

Did Not Maintain Previous (D)

Maintained (M)

Improved (I)

---

7. Under 'Monthly Summary' complete the 3 dropdowns (comments optional)

a. Supports and Services
b. Had a significant life change or events
c. Health and safety issues

Back **Monthly Summary** Save

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

N=No Update Required, E=Extended Absence, D=Did Not Maintain Previous,
M=Maintained, I=Improved

Services And Monthly Progress

1. I would like to improve my daily living skills.
   09-06-2022
   Fully Engaged:1 Partially Engaged:0 Refused:0   M

2. I want to live more independently and participate in more r...
   09-06-2022
   Fully Engaged:0 Partially Engaged:0 Refused:0   N

3. I want to live independently and learn independent daily liv...
   09-06-2022
   Fully Engaged:0 Partially Engaged:0 Refused:0   N

Monthly Summary

Satisfied ▼ : With support and services

Comments

Has not ▼ : Had significant life change or events

Comments

Are ▼ : Health and safely issues

Comments

joe spent time in the hospital due to an infection in his lung

Additional Comments

Back **Monthly Summary** Save

AVERAGE, JOE
SDS-SELF-HIRED COMMUNITY HABILITATION
JAN 2023

N=No Update Required, E=Extended Absence, D=Did Not Maintain Previous,
M=Maintained, I=Improved

Services And Monthly Progress

1. I would like to improve my daily living skills.
   09-06-2022
   Fully Engaged:1 Partially Engaged:0 Refused:0   M

2. I want to live more independently and participate in more r...
   09-06-2022
   Fully Engaged:0 Partially Engaged:0 Refused:0   N

3. I want to live independently and learn independent daily liv...
   09-06-2022
   Fully Engaged:0 Partially Engaged:0 Refused:0   N

Monthly Summary

Satisfied ▼ : With support and services

Comments

Has not ▼ : Had significant life change or events

Comments

Are ▼ : Health and safely issues

Comments

joe spent time in the hospital due to an infection in his lung

Additional Comments

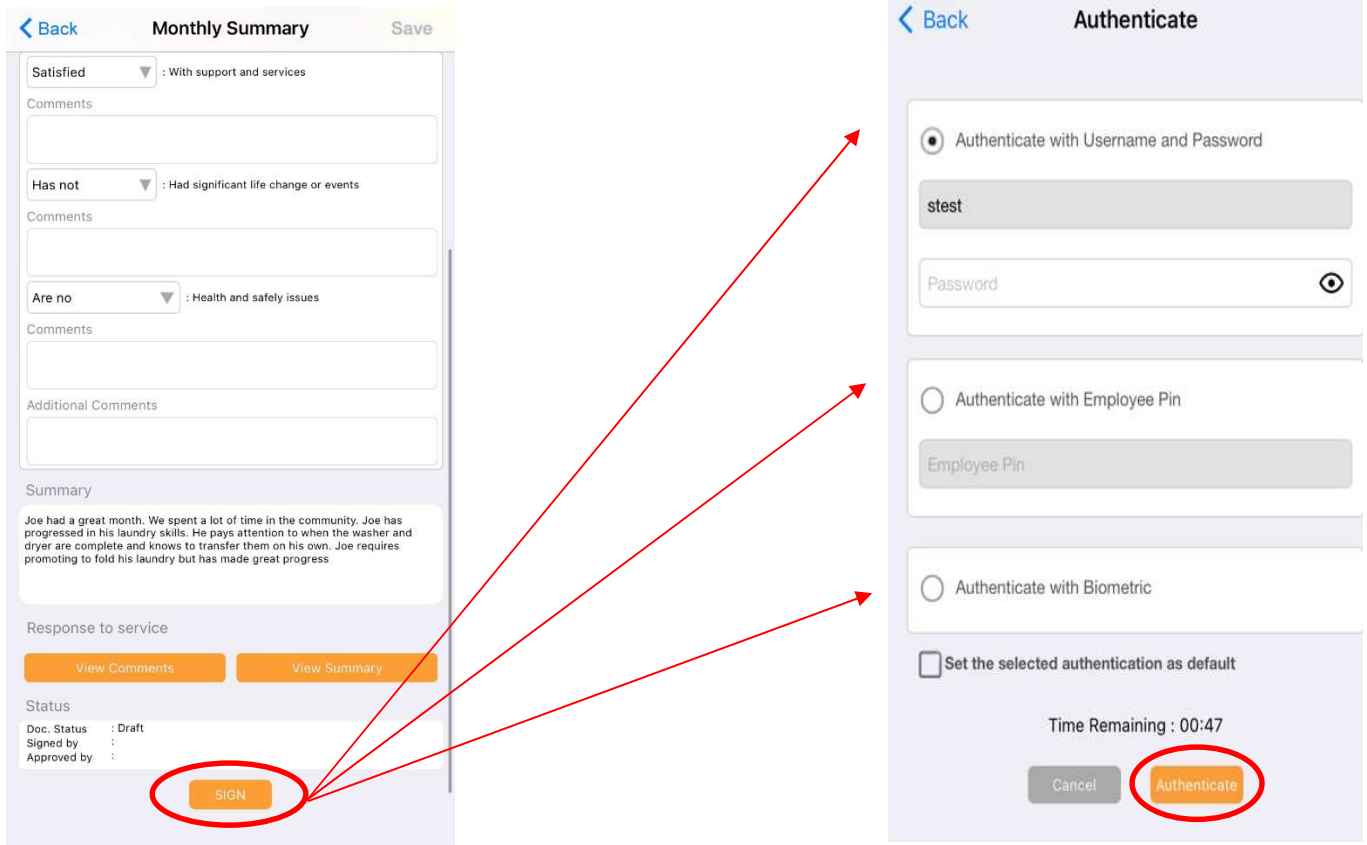**8. Add monthly notes in the textbox labeled 'summary' and select 'save'**

EXAMPLE

Reminder*
Monthly Summary Note:
a short paragraph outlining that month's successes, challenges, and any exciting future plans.

Select 'View Comments' for individual shift notes if needed

7. Select 'Sign' at the bottom (indicated by orange button)

8. Select 'Authenticate' using 1 of the 3 options below (indicated by orange button)

Please Note:

- Approval signatures will come from the team's SD Coordinator after the month has been completed and signed off by staff

- Staff cannot sign monthly summaries ahead of time but can save notes throughout the month—monthly summaries can <u>only</u> be signed once the month has been completed

- If corrections are needed reach out to your team's SD Coordinator to unlock document for editing

Entering Mileage Reimbursement Request
eVeroMobile App

*Mileage- When a person needs transportation to/from a service-related activity. Transportation costs and mileage must be related to a Medicaid reimbursable service within the Self-Direction Budget. Transportation related to IDGS services or those delivered by Self-Hired staff would be considered allowable reimbursable costs

* eVeroMobile app- app utilized by staff to submit reimbursement requests. All reimbursement requests must be submitted directly on the eVero app

*Transportation Note-
- In order to reimburse for IDGS mileage staff must be clocked in/providing services
- Transportation locations/destinations must be mentioned in the daily note in order to qualify for reimbursement

1. From the 'Home' screen select 'Mileage' icon

2. Under 'Mileage' screen, select the blue plus sign to enter new mileage request (top right-hand corner)
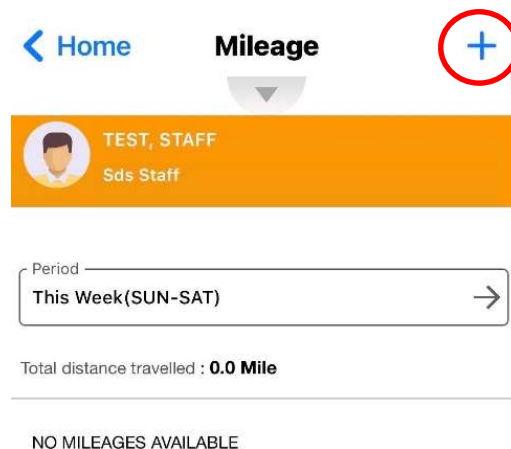
3. Select date of expense using the calendar icon (upper left-hand side of screen)
4. Ensure the 'Paid to' section reflects who is seeking reimbursement
5. Verify Program category is 'Individual Directed Goods and Services'
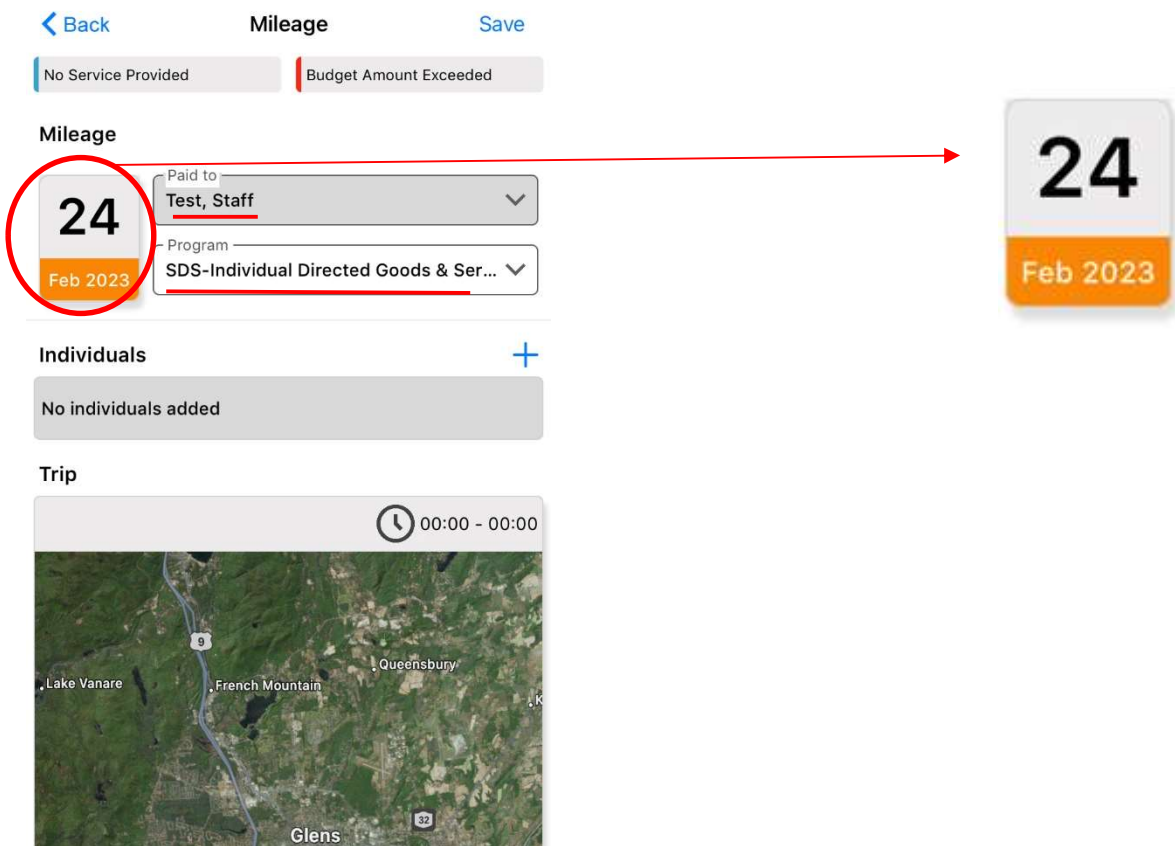
6. To choose individual select the blue plus sign (upper right-hand corner)
7. Select individual by clicking empty checkbox (selection indicated by grey checkmark)
8. Select 'Done' (upper right-hand corner)
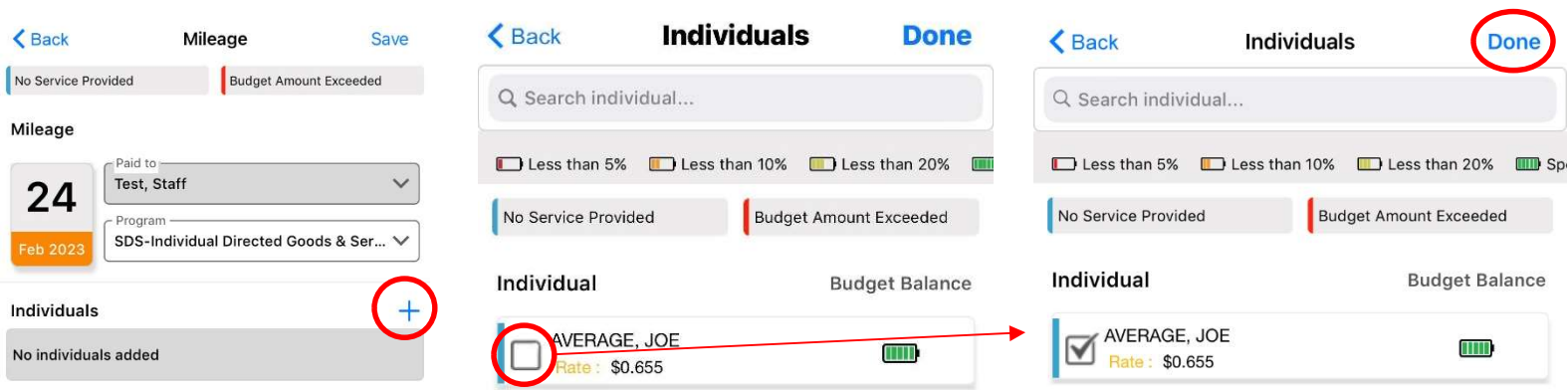
9. Enter 'Start' and 'Stop' locations ('Start' indicated by a green icon; 'Stop' indicated by a red icon)
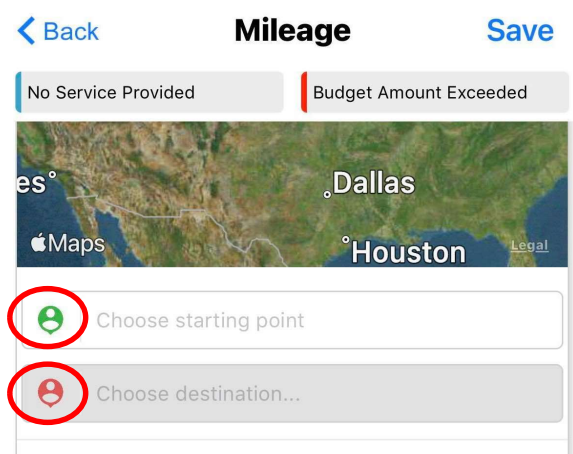
10. Locations list will populate with any favorited locations (you can edit or delete by swiping left on the location box)

11. Select 'New' to enter new location
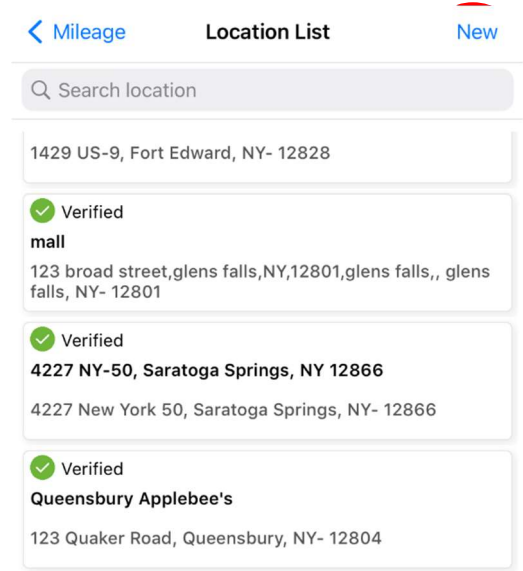
11. To 'Search Location' select 'Search Location' (upper left-hand side of screen)

12. For 'Current Location' select 'Current Location' (upper right-hand side of screen)

13. Once location is selected the address will populate; select 'Done' to continue entry
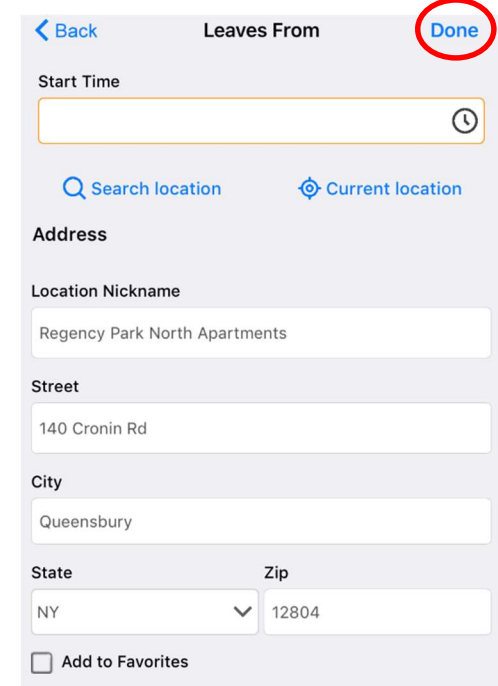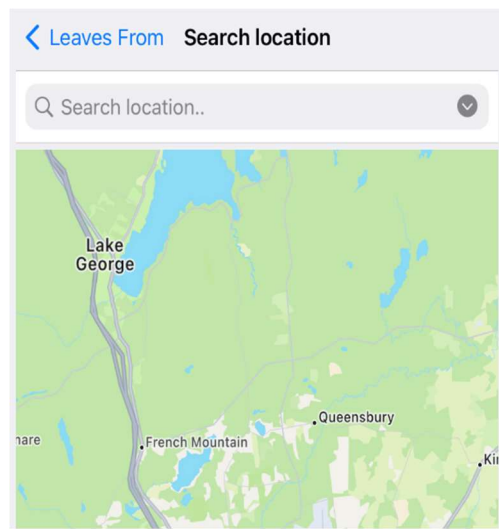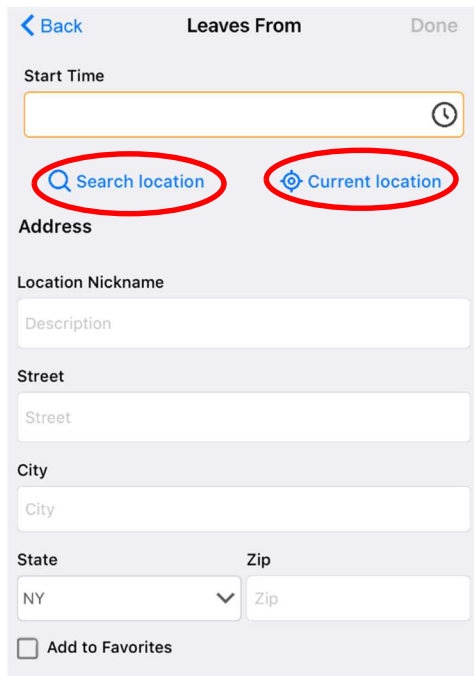
Note: To add <u>frequented addresses</u> to favorites, select 'Add to Favorites' (selection indicated by grey checkbox and will populate on locations list)
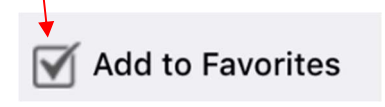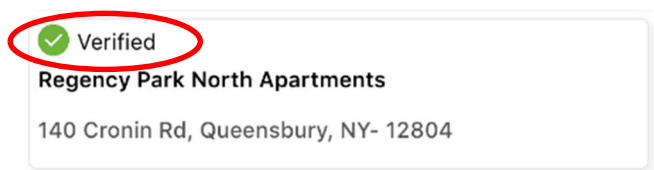
14. Verify number of miles traveled under 'Miles' and 'Total Miles' (indicated in purple)
15. If miles are 'Round Trip' select 'Round Trip' (selection indicated by orange toggle)
16. Reimbursement amount will calculate under 'Amount'
17. Enter note on visit under 'Purpose of Visit'
18. If mileage requires attachments due to parking fees/tolls attach using the blue paperclip and select 'From Camera' or 'From Photo Library'
19. Select 'Save' to save mileage entry

Note for 'Round Trip'
Select 'Round Trip' if you are traveling from point A to point B and back to point A
(no other stops taken)

20. Attention screen will indicate mileage was saved successfully; Select 'OK'

21. Return to 'Mileage' screen to review entry populated
22. Select blue plus sign (upper right-hand corner) for additional entries
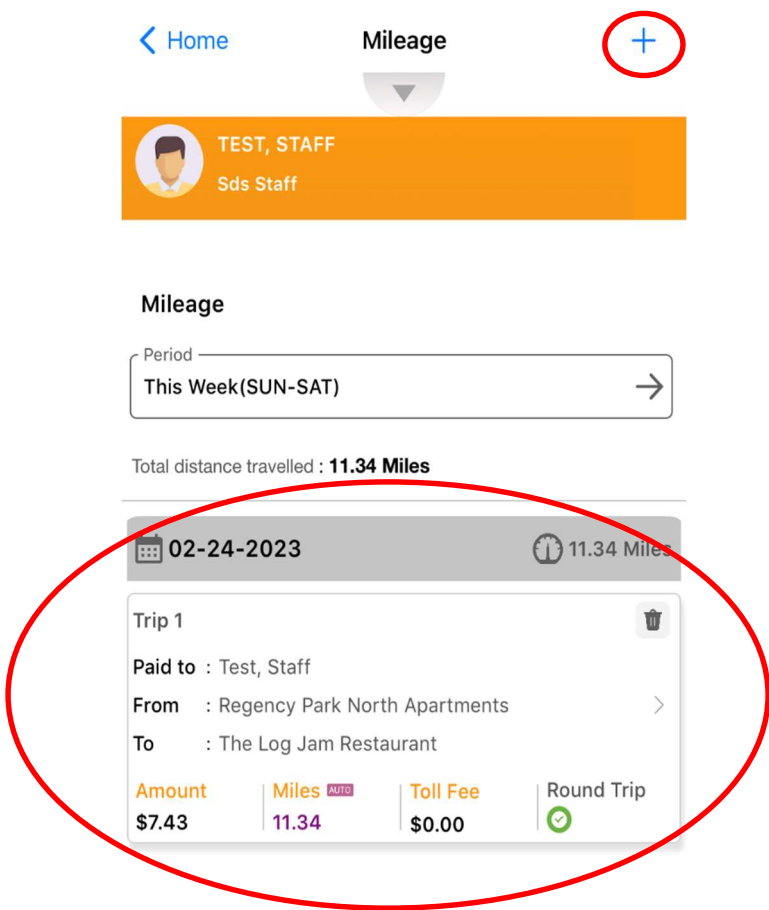
Entering Staff Activity Fees Reimbursement Request
eVeroMobile App

*Staff Activity Fees (SAF)- Staff activity fees to cover meals, admissions, fees, transportation or other costs incurred by staff when providing support to the self-directing person in activities that support a valued outcome (requires itemized receipt and proof of payment for activities in the community)

* eVeroMobile app- app utilized by staff to submit reimbursement requests. All reimbursement requests must be submitted directly on the eVero app.

*Staff Activity Fee Note-
- In order to reimburse for OTPS Staff Activity Fees staff must be clocked in/providing services
- Locations/destinations of the activity fee must be mentioned in the daily note in order to qualify for reimbursement
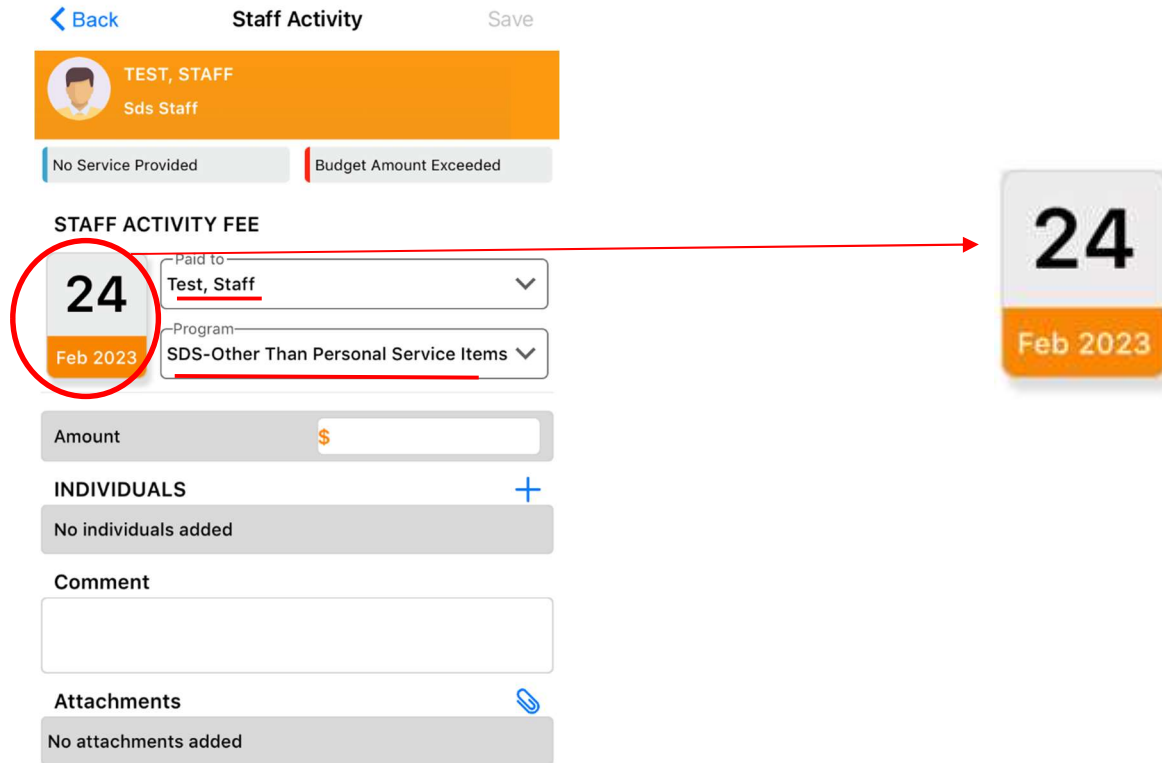
1. From the 'Home' screen select 'Staff Activity Fees' icon
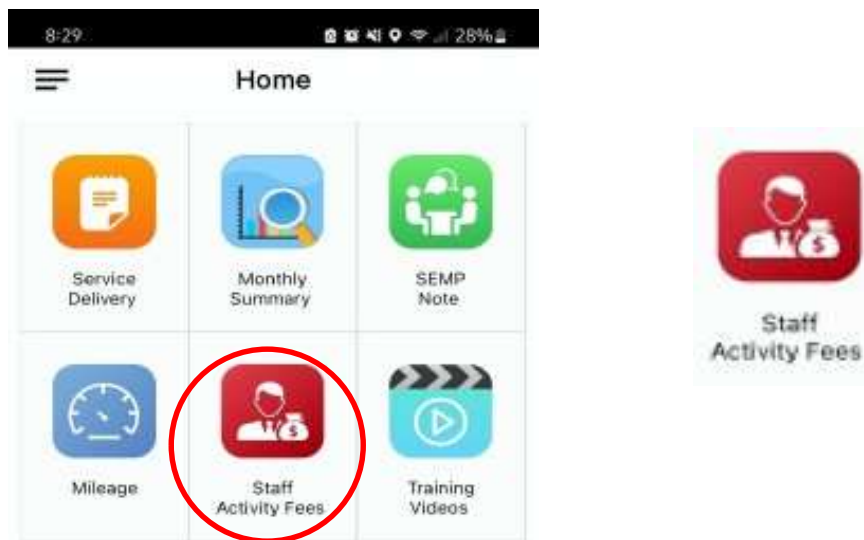
2. Under 'Staff Activity Fees' screen, select the blue plus sign to enter new staff activity fee request (top right-hand corner)

3. Select date of expense using the calendar icon (upper left-hand side of screen)
4. Ensure the 'Paid to' section reflects who is seeking reimbursement
5. Verify Program category is 'Other Than Personal Service Items'

6. To choose individual select the blue plus sign (upper right-hand corner)
7. Select individual by clicking empty checkbox (selection indicated by grey checkmark)
8. Select 'Done' (upper right-hand corner)

9. Under 'Amount' enter dollar amount of the reimbursement request
10. Under 'Comment' enter note on staff activity fee
11. To upload attachments, select the blue paperclip and select 'From Camera' or 'From Photo Library' (indicated by red and orange photo icons)
12. Once an attachment is selected enter 'Photo Description' (example: Photo 1 or ice cream receipt) and select 'OK'

13. Verify all information is correct and receipt is legible upon upload
14. Select 'Save' to save staff activity fee entry
15. Attention screen will indicate data was saved successfully; Select 'OK'

16. Return to 'Staff Activity Fees' screen to review entry populated
17. Select blue plus sign (upper right-hand corner) for additional entries

Self-Hired Community Habilitation <u>Billable Note Example</u>
eVeroMobile App

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*Community Habilitation- a service delivered in the community (i.e., non-certified settings) to facilitate inclusion, integration, and relationship building

*Quality Notes- staff will enter daily shift notes when providing Community Habilitation services. Notes should include important details of the supports provided during that shift. This should directly relate to the individual's goals/valued outcomes as indicated in the 'Methods' Section of the eVeroMobile app (NYS Medicaid requirement for quality documentation)

*eVeroMobile app- timekeeping app utilized by staff when providing NYS Medicaid supports

Example includes: Assigned Goal, Staff Methods/Supports, an Example of a Billable Note, and Staff Tips (to ensure documentation and reimbursements entered (if available to staff) can be supported)

Staff Action Plan:

Assigned Goal:
I would Like to Improve my Daily Living Skills (G)

Staff Methods:
Staff will assist with skills in the kitchen to ensure safety and daily living skills like laundry and cleaning

---

Example Shift Note:

I went to the grocery store with Joe to get items to prepare lunch. On the way home Joe wanted to stop for ice cream. I assisted Joe with using the correct change when paying for ice cream. *(Where and What covers Mileage and Staff Activity Fee).* When making lunch I helped Joe cut his sandwich in half safely *(Staff Support).* Joe had a great day. He loved his ice cream and lunch *(Individual Response)*

Shift Note Rule of 3:

1. *Where you Went/What you Did (Covers SAF and Transportation)*
2. *Staff Support*
3. *Individual Response*