



## Instructions – CSS Monthly Summary Note (CSS-01)

Each month, the participant **must complete** a CSS Monthly Summary Note (CSS-01) **describing the supports and services he/she received for the service month and addressing any issues or concerns**. The participant may complete the CSS Monthly Summary Note independently or with the help of his/her designee or staff, or may ask a designee to complete it for him/her.

This report must be **sent to the Financial Management Services agency (FMS) prior to the 10<sup>th</sup> day of the month following the service month** or as agreed upon in the FMS/Participant Memo of Understanding so that the FMS can bill for the services and supports the participant receives. Late submission may result in disruption of your continuing CSS services.

### Participant Instructions:

As a CSS participant, it is your responsibility to complete the CSS Monthly Summary Note as explained below and then send the completed form to your FMS agency in a timely manner. You may ask your staff, a family member, your circle of support, your support broker or another individual to help you complete this form, or an individual you designate may complete it for you. If you need monthly reminders to complete the CSS Monthly Summary Note, please ask your FMS.

*Complete the top of the form:*

- enter the month/year that you are reporting on,
- enter the participant's name,
- If you held a Circle of Support meeting this month, **check** " Yes," otherwise check " No."
- In the box labeled "**This month I used the following items that are included in my ISP and/or CSS budget,**" **check** any of the activities and expenses from the participant's CSS budget that were used during the month. For example, if all or part of the rent is paid from the participant's CSS budget, check " Household supports".

*Complete the Valued Outcomes section of the form:*

- Valued Outcomes:  
The participant's valued outcomes and some related supports and services are preprinted on this form by the FMS. They should match the appropriate valued outcomes identified in the ISP and listed on the employee time sheet or contractor service record. This form may not include every valued outcome listed in the ISP.
- Four statements must be completed for each valued outcome:
  - "This month I participated in the following activities related to this valued outcome:" – **write down what activities** the participant did this month
  - "I was satisfied with the following services and supports I received to help me take part in the activities:" – **write down whether the participant was satisfied with the services and supports** he/she received to help him/her participate in these activities
  - "These activities helped me progress toward my valued outcomes by:" – **write down how the activities helped** the participant make progress toward reaching the valued outcome
  - "I would like to make the following changes to my services and supports:" – **write down any changes the participant wants to make** to supports and services

*Complete the bottom of the form:*

- You or your designee **sign and date EVERY PAGE of this form** to affirm that the information contained on this form is correct. Enter the **month/day/year** the form is signed in the space provided. Any person you give permission to sign this form **must** be identified in your CSS Plan/Budget.
- Write the name of any person helping you complete this form, his/her relationship with you, and the date in the box in the lower right hand corner of the CSS Monthly Summary Note.
- Then **send the completed, signed and dated form to the FMS prior to the 10<sup>th</sup> day of the month following the service month**.



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### FMS Instructions:

The **FMS must supply** each participant with customized CSS Monthly Summary Note forms that contain:

- the name of the FMS agency (on front & back of each sheet)
- the participant's name (on front & back of each sheet)
- **preprinted valued outcomes and the supports/services to be provided** as identified in the participant's ISP – you may need to use more than one sheet

Once the FMS receives the completed CSS Monthly Summary Note, the FMS must check it to ensure that it is properly completed, signed, and dated by the CSS participant or his/her designee.