

Broker Meeting Minutes

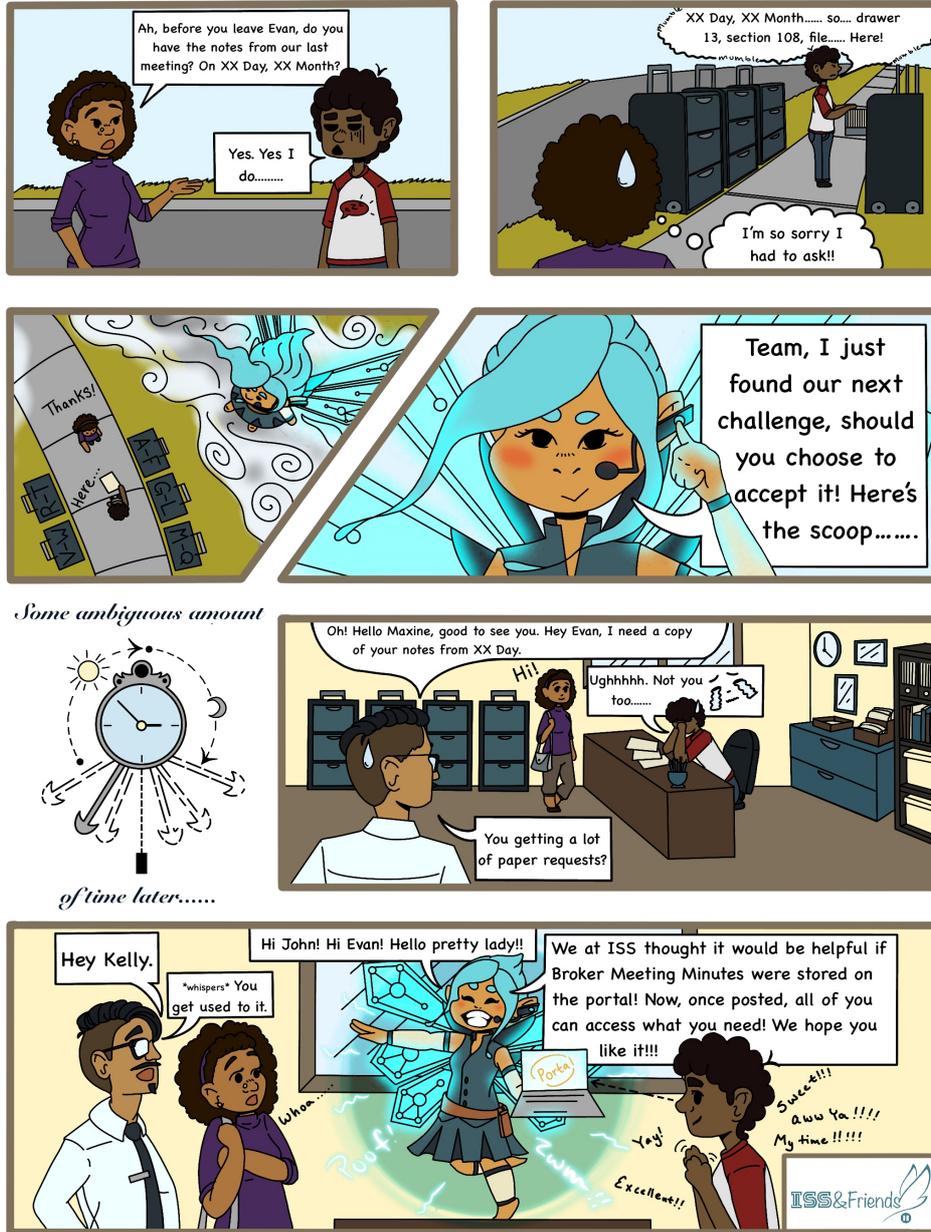
How to upload and view Broker Meeting Minutes in the portal.

- [Broker Meeting Minutes Upload Guide](#)
- [Upload Broker Meeting Minutes \(Brokers Only\)](#)
- [View Broker Meeting Minutes](#)

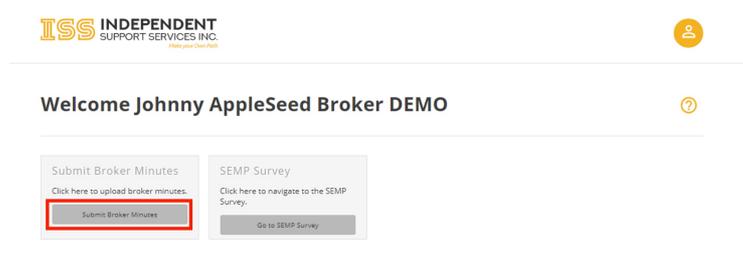
Broker Meeting Minutes Upload Guide

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Upload Broker Meeting Minutes (Brokers Only)



1. From the home page, click **Submit Broker Minutes**.



2. Complete the form. Click **Submit** when done.

*Uploaded files must be PDFs.

*The SD Coordinator will need to approve the uploaded document. Until it is

approved, it will have a status of "Pending".

ISS INDEPENDENT
SUPPORT SERVICES INC.
www.iss.com

Submit Your Minutes

Document Name
Document Name

Participant
Select a Participant

Meeting Date
mm/dd/yyyy

Upload Broker Meeting Minutes
Drag and drop a file here to upload, or [click here](#) to choose a file.

Comments
Characters Remaining: 255

Submit

[Close This Window](#)

3. Close the window when finished

View Broker Meeting Minutes

1. From the home page, select the participant from the list.

Choose A Participant

Jameson DEMO, James

Medicaid: 67890XYZ-CR
DOB: 1/1/1990
Title: Support Broker
Coordinator: ISS Test

Maryson DEMO, Mary

Medicaid: 12345XYZ
DOB: 1/1/1980
Title: SEMP Reporter, Support Broker
Coordinator: ISS Test

Thompson DEMO, Thomas

Medicaid: 12345BMW
DOB: 1/1/1970
Title: Support Broker
Coordinator: ISS Test

2. Select the Documents tab across the top.

Dashboard

Budget

Documents

Staff Action Plan

Hab Plan

Contacts



3. Select the Plan Documents tab.

View All



Timesheets

Expenses
Pg 0 of 0

Plan Documents

4. Broker Meeting Minutes are listed under their category heading.
5. Click Download to download the file.

BROKER MEETING MINUTES

NAME	STATUS	MEETING DATE	ACTIONS
Test 12/10/2019	Approved	12/06/2019	Download