

# Broker Meeting Minutes

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

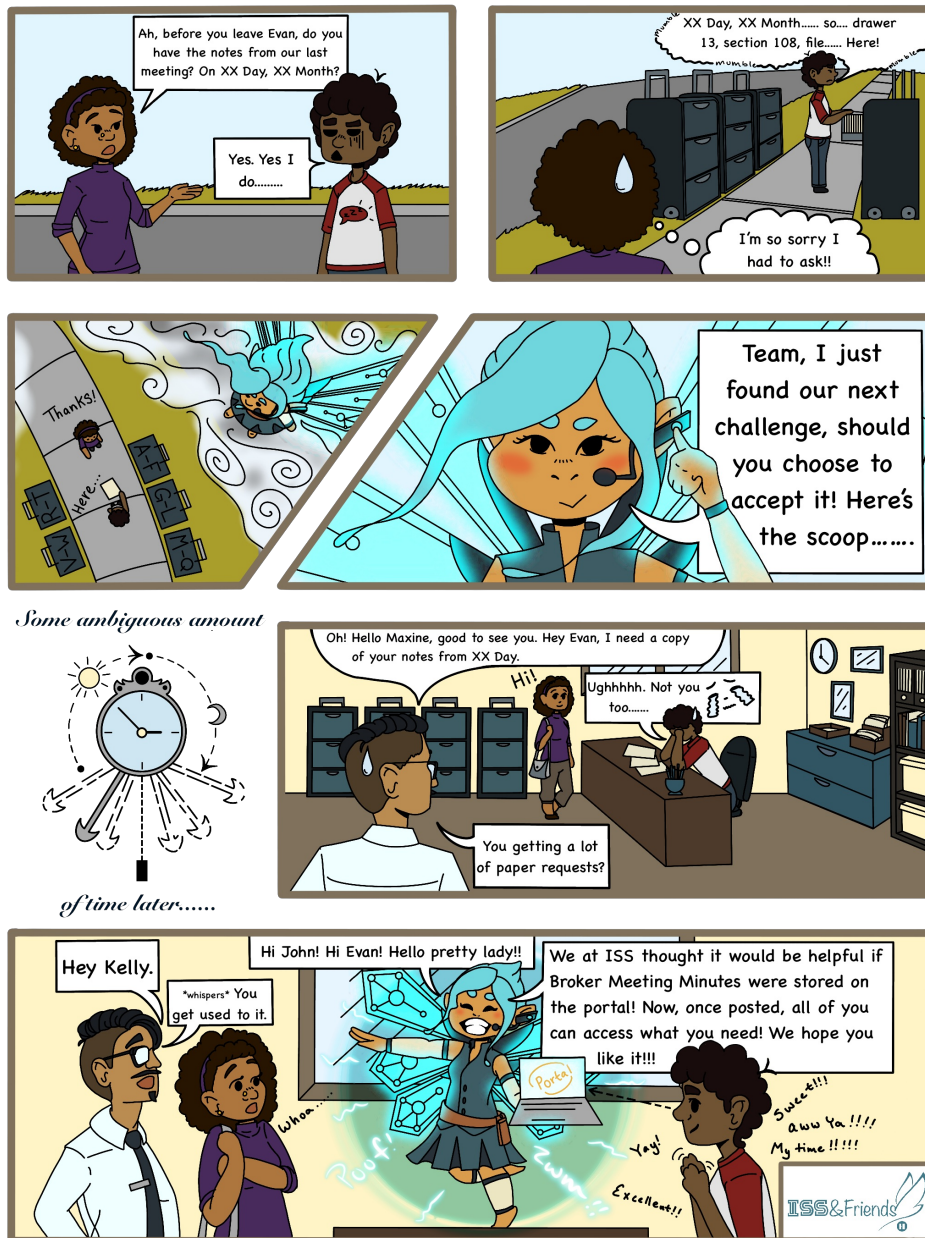
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# Broker Meeting Minutes Upload Guide

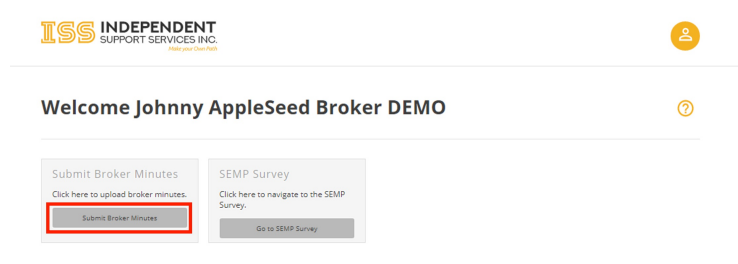
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# Upload Broker Meeting Minutes (Brokers Only)



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.

Make your claim fast

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](#)[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   | <a href="#">Download</a> |