Broker Meeting Minutes

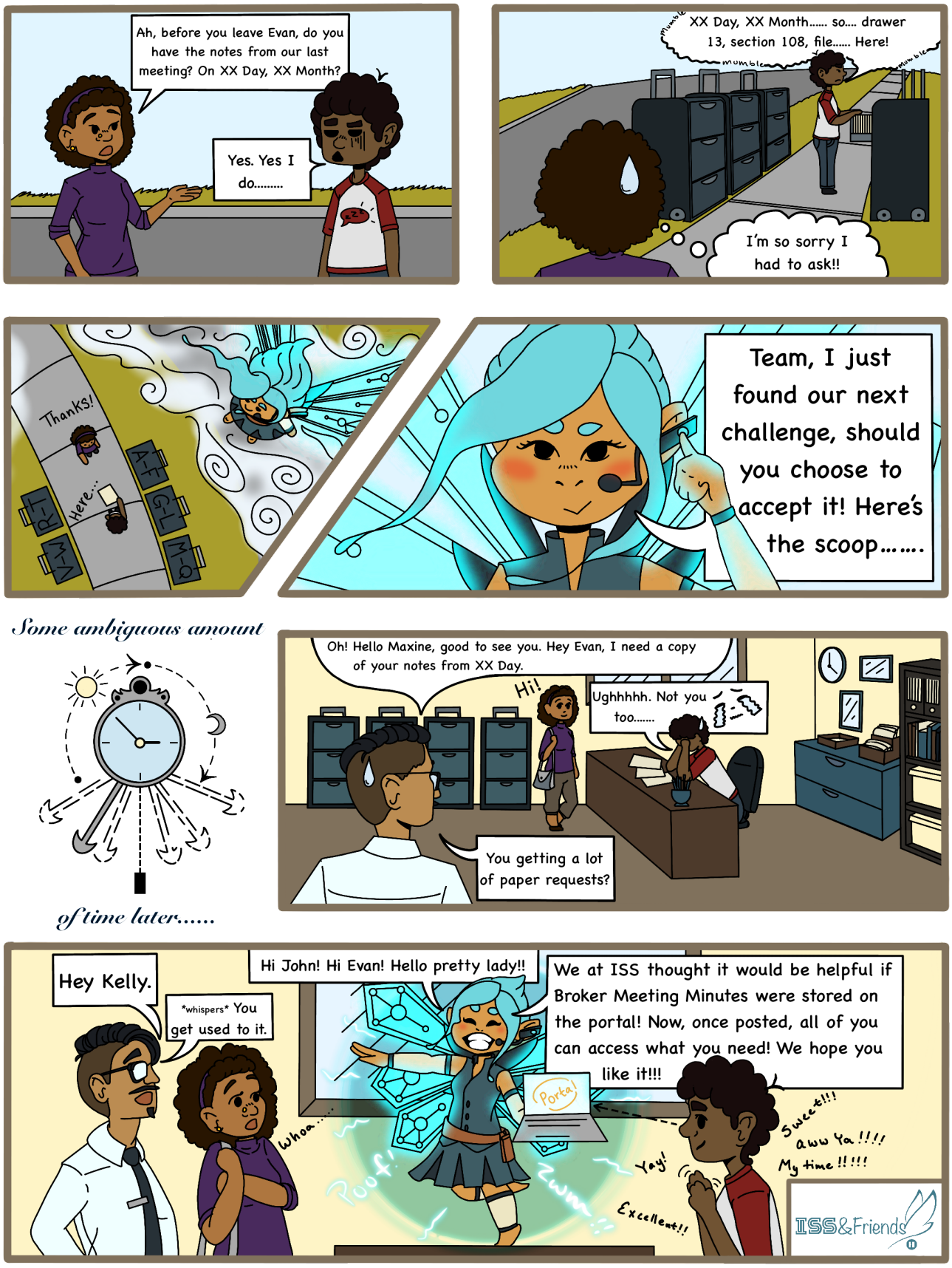
How to upload and view Broker Meeting Minutes in the portal.

- Broker Meeting Minutes Upload Guide
- Upload Broker Meeting Minutes (Brokers Only)
- View Broker Meeting Minutes

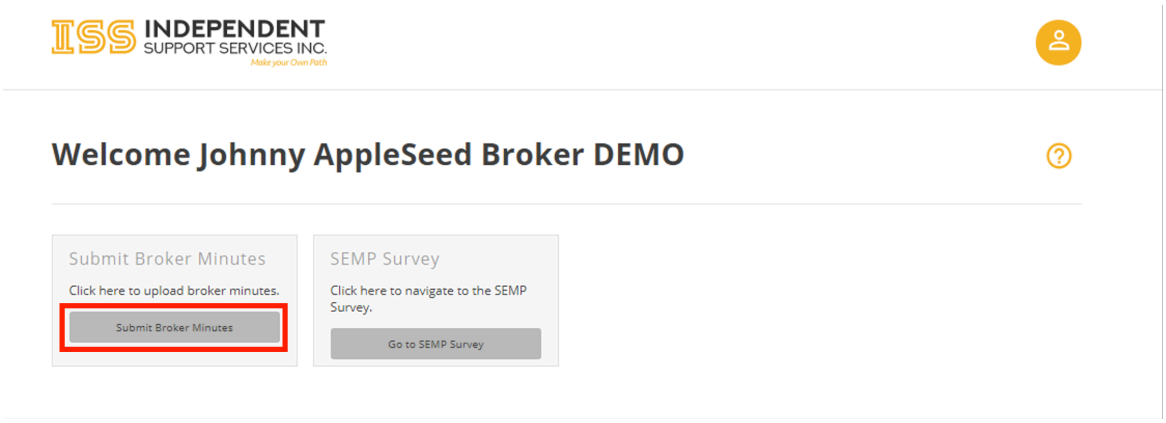
Broker Meeting Minutes Upload Guide

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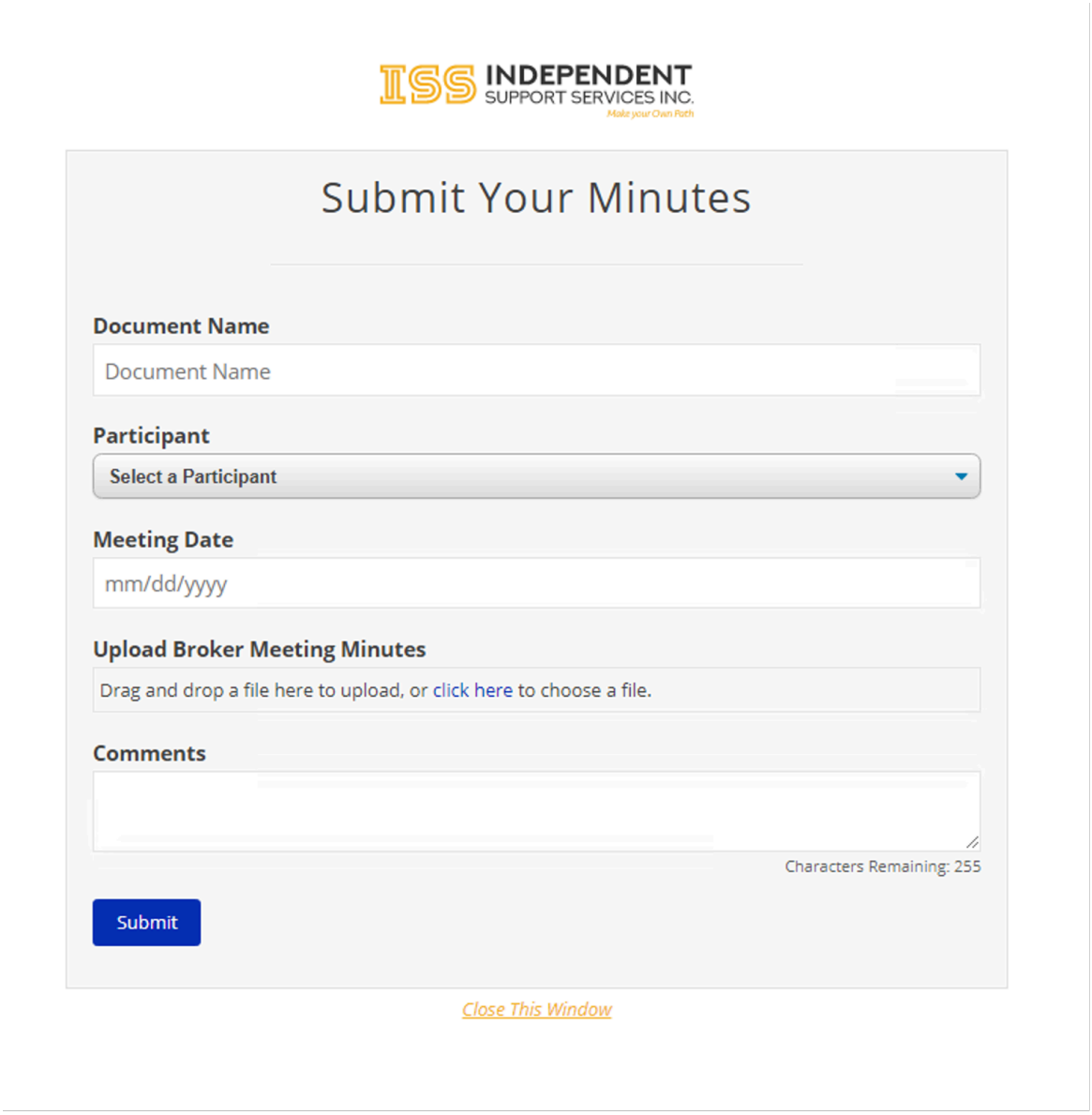
Upload Broker Meeting Minutes (Brokers Only)



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



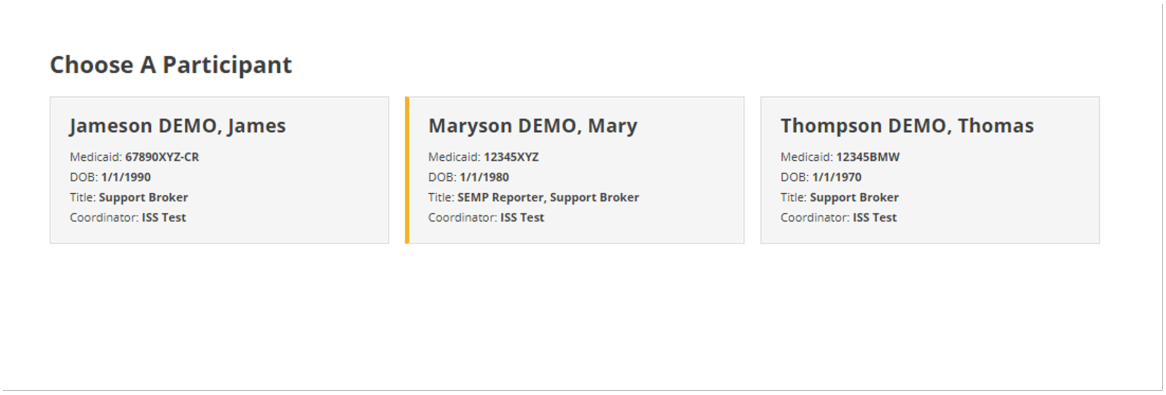
2. Complete the form. Click **Submit** when done.
   *Uploaded files must be PDFs.
   *The SD Coordinator will need to approve the uploaded document. Until it is approved, it will have a status of “Pending”.



3. Close the window when finished

View Broker Meeting Minutes

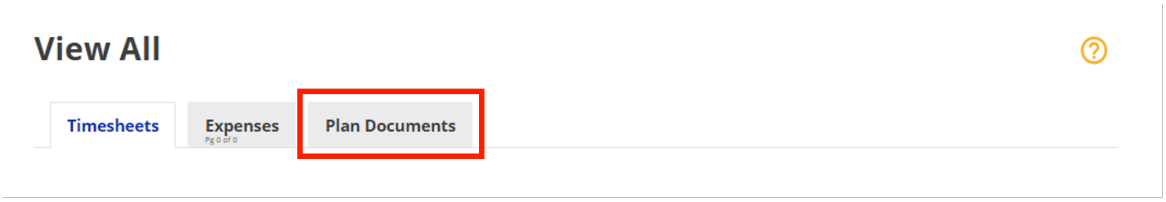
1. From the home page, select the participant from the list.



2. Select the Documents tab across the top.



3. Select the Plan Documents tab.



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

