

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

[Download PDF](#)



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

 **INDEPENDENT**
SUPPORT SERVICES INC.
Help you succeed



Welcome Johnny AppleSeed Broker DEMO

Submit Broker Minutes

Click here to upload broker minutes.

Submit Broker Minutes

SEMP Survey

Click here to navigate to the SEMP Survey.


Go to SEMP Survey

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

Participant

Select a Participant

Meeting Date

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	Download