

# 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](#)

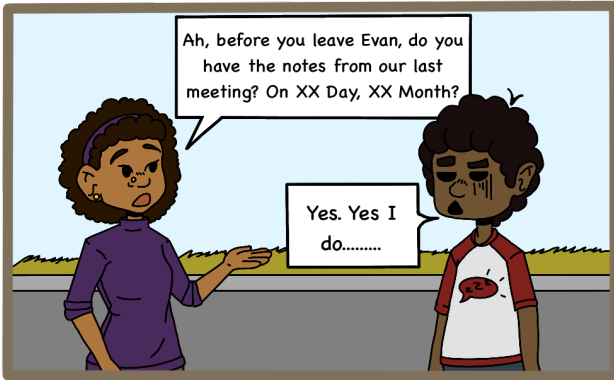
# Broker Meeting Minutes Upload Guide

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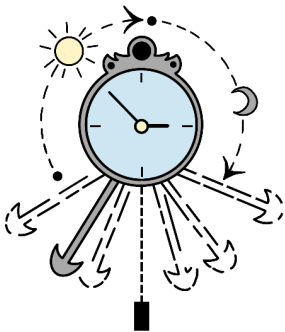
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# Upload Broker Meeting Minutes (Brokers Only)

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*Some ambiguous amount*



*of time later.....*



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

## Welcome Johnny AppleSeed Broker DEMO



<p>Submit Broker Minutes</p> <p>Click here to upload broker minutes.</p> <p><b>Submit Broker Minutes</b></p>	<p>SEMP Survey</p> <p>Click here to navigate to the SEMP Survey.</p> <p>Go to SEMP Survey</p>
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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".

### 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

<b>Jameson DEMO, James</b> Medicalid: 67890XYZ-CR DOB: 1/1/1990 Title: <b>Support Broker</b> Coordinator: ISS Test	<b>Maryson DEMO, Mary</b> Medicalid: 12345XYZ DOB: 1/1/1980 Title: <b>SEMP Reporter, Support Broker</b> Coordinator: ISS Test	<b>Thompson DEMO, Thomas</b> Medicalid: 12345BMW DOB: 1/1/1970 Title: <b>Support Broker</b> Coordinator: ISS Test
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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	<b>Download</b>