

Broker Meeting Minutes

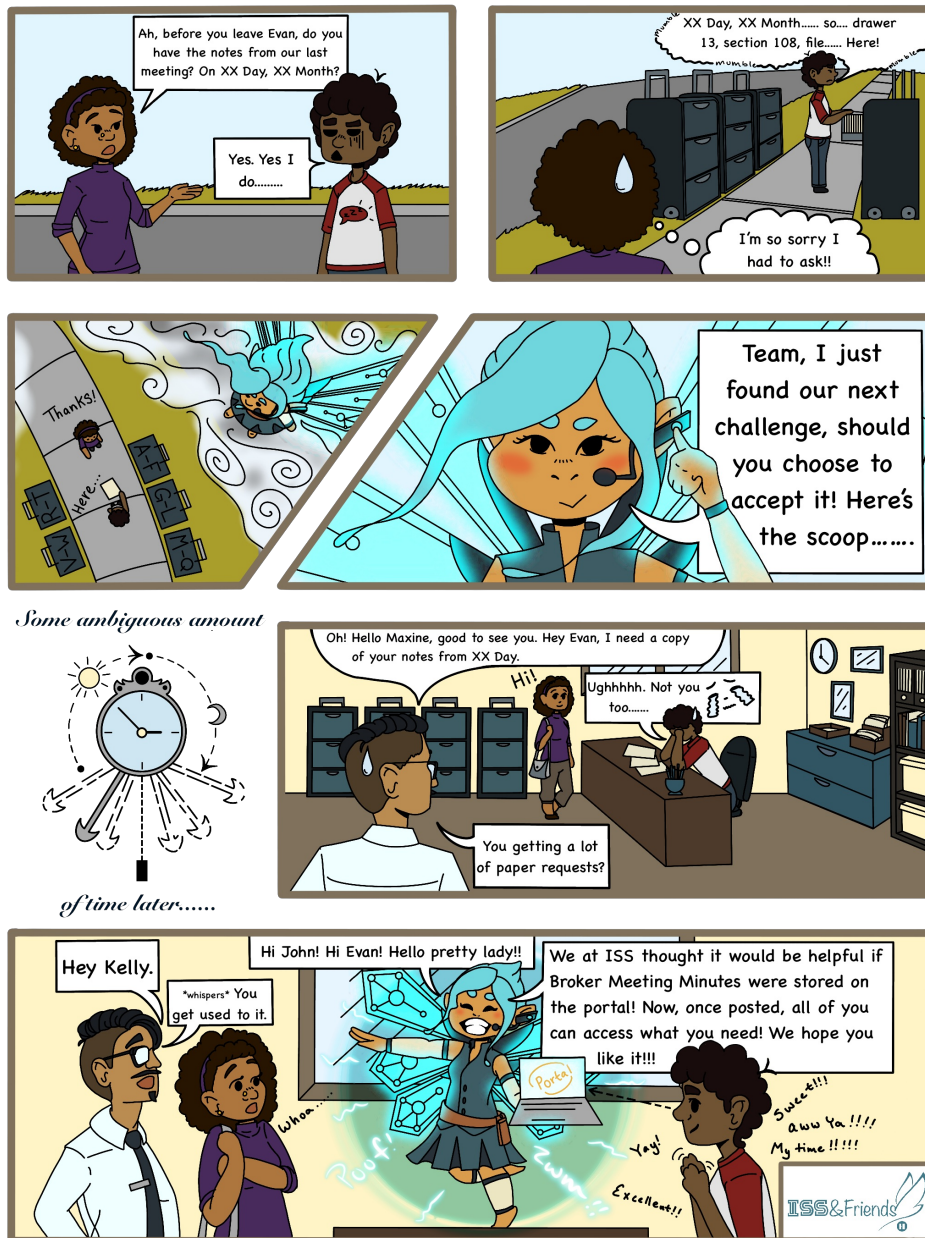
How to upload and view Broker Meeting Minutes in the portal.

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

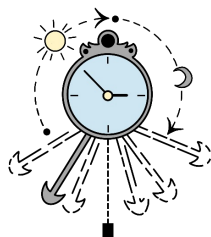
Broker Meeting Minutes Upload Guide

[Download PDF](#)

Upload Broker Meeting Minutes (Brokers Only)

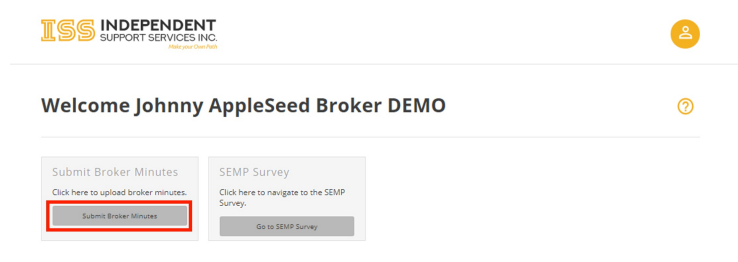


Some ambiguous amount



of time later.....

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	Download