

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

🕒 Revision #1

★ Created Tue, Nov 24, 2020 6:35 PM by [Admin](#)

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