

Viewing Monthly Summary Notes

Monthly Summary Notes show under the Plan Docs tab in the Documents section of a participant.

From the home page,

1. Select a participant.

Welcome Maxine Ellis

Expenses

Upload your latest expenses and receipts for review and approval.

[Submit Now »](#)

Choose A Participant

Ellis, Owen

Medicaid:


DOB:

Title: **Primary Contact**

Coordinator:

2. Select the **Documents** tab.

Showing: Owen Ellis


 Dashboard Budget Documents Staff Action Plan Staff Contacts **MENU**

Dashboard For Owen Ellis



3. Select the **Plan Docs** tab.

Showing: Owen Ellis

 Dashboard Budget Documents Staff Action Plan Staff Contacts **MENU**

View All



Timesheets
Pg 0 of 0

Expenses
Pg 0 of 0

Plan Documents

Category: All Filter Monthly Summary Notes

MONTHLY SUMMARY NOTES

NAME	TYPE	SUBMISSION DATE	ACTIONS
Jul 2020 - COMHAB - 2276 - MSN.pdf	pdf	9/22/2020	Download

4. To view one of the listed Monthly Summary Notes, click **Download**.

[What shows on the downloadable PDF?](#)

Disclaimer: All names displayed in the above screen shots are fictional characters. No identification with actual persons (living or dead) is intended or should be inferred.

🔄Revision #14

★Created Tue, Sep 22, 2020 4:35 PM by [Admin](#)

✎Updated Thu, Feb 9, 2023 4:59 PM by [Admin](#)