

# 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	<a href="#">Download</a>

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.*

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