

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](#) [Expenses](#) [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.

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