

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

ISS INDEPENDENT
SUPPORT SERVICES INC.
Make your Own Path

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



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

Showing: Owen Ellis

ISS INDEPENDENT
SUPPORT SERVICES INC.
Make your Own Path

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

View All ?

Timesheets Pg 0 of 0 | **Expenses** Pg 0 of 0 | **Plan Documents**

Category:

MONTHLY SUMMARY NOTES

NAME	TYPE	SUBMISSION DATE	ACTIONS
Jul 2020 - COMHAB - 2276 - MSN.pdf	pdf	9/22/2020	<input type="button" value="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

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