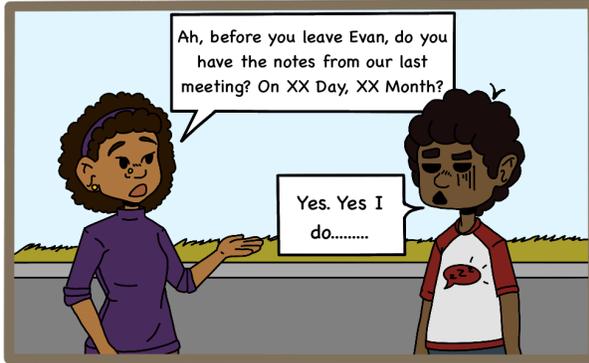
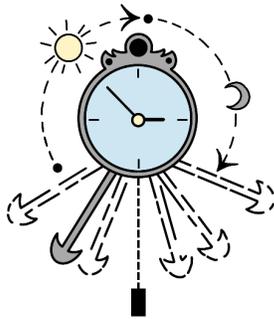


## Broker Meeting Minutes Upload Guide



*Some ambiguous amount*



*of time later.....*

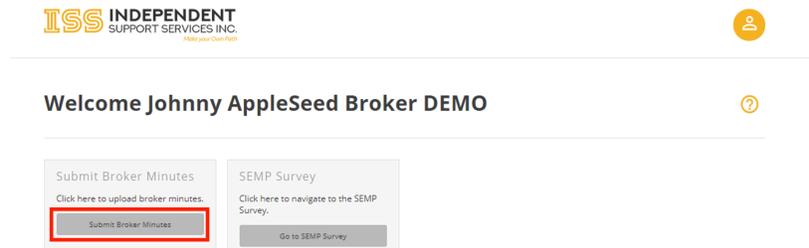


## Broker Meeting Minutes Upload Guide

### UPLOAD BROKER MEETING MINUTES (BROKERS ONLY)

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(1) From the home page, click **Submit Broker Minutes**.



(2) Complete the form. Click **Submit** when done.

\*Uploaded files must be PDFs.

\*The SD Coordinator will need to approve the uploaded document. Until it is approved, it will have a status of "Pending".

The screenshot shows the 'Submit Your Minutes' form. The form has the following fields and sections:

- Document Name:** A text input field with the placeholder 'Document Name'.
- Participant:** A dropdown menu with the placeholder 'Select a Participant'.
- Meeting Date:** A text input field with the placeholder 'mm/dd/yyyy'.
- Upload Broker Meeting Minutes:** A text area with the placeholder 'Drag and drop a file here to upload, or [click here](#) to choose a file.'
- Comments:** A large text area for entering comments. A character count 'Characters Remaining: 255' is visible at the bottom right of the text area.
- Submit:** A blue button with the text 'Submit'.

Below the form, there is a link that says 'Close This Window'.

(3) Close the window when finished.

## Broker Meeting Minutes Upload Guide

### VIEW BROKER MEETING MINUTES

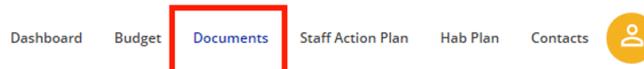
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(1) From the home page, select the participant from the list.

#### Choose A Participant

<b>Jameson DEMO, James</b> Medicalid: 67890XYZ-CR DOB: 1/1/1990 Title: Support Broker Coordinator: ISS Test	<b>Maryson DEMO, Mary</b> Medicalid: 12345XYZ DOB: 1/1/1980 Title: SEMR Reporter, Support Broker Coordinator: ISS Test	<b>Thompson DEMO, Thomas</b> Medicalid: 12345BMW DOB: 1/1/1970 Title: Support Broker Coordinator: ISS Test
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(2) Select the **Documents** tab across the top.



(3) Select the **Plan Documents** tab.



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