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NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS

This document outlines all features and functions available to submitting Navigator Bi-Monthly Payment Requests in the Certification Portal.

BI-MONTHLY PAYMENT REQUEST NOTIFICATION

The Primary or Authorized Contact listed on the Entity is responsible for submitting a Bi-Monthly Payment Request. An email notification will be sent to the Entity business contacts 10 days prior to the due date with a link to access the request. A similar notification will be sent 5 and 1 day prior to the due date.

Email Subject: Navigator Grant Payment Request due in 10 days



Hello,

Your Bi-Monthly Payment Request is due on 2/10/2018. You have 10 days left to submit the request.

Please complete and submit the request [HERE](#).

Thank you,
Covered CA



Link to request

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

ACCESS YOUR PAYMENT REQUEST

To access the Payment Request, click the link in the email notification to navigate to the record in the Certification Portal. You can view all your Payment Requests from the My Entity home page.

The screenshot shows the user interface for the account 'Hollywood Medical Center'. At the top, there is a search bar and a user profile for 'DOOGIE ...'. Below this is a navigation bar with links for 'MY ENTITY', 'COUNSELORS', 'COVEREDCA.COM', and 'CONTACT SUPPORT'. The main content area is divided into two columns. The left column contains 'Entity Information' with fields for Account Name, Parent Account, Business Legal Name, Website Address, Category, Federal Tax ID, and Organization Type. The right column contains 'Entity Status' and 'Program Type'. Below these are four summary cards: 'Required Documentation (0)', 'My Files (0)', 'Progress Reports (0)', and 'Payment Requests (1)'. A yellow arrow points from the 'Payment Requests (1)' card to a table below it. The table has columns for 'PAYMENT ...', 'REQUEST PE...', 'STATUS', and 'DAYS UNTIL ...'. One row is visible with the ID 'PRQ-0097', date '2/10/2018', status 'Approved', and '10' days until. A 'View All' link is at the bottom right of the table.

PAYMENT ...	REQUEST PE...	STATUS	DAYS UNTIL ...
PRQ-0097	2/10/2018	Approved	10

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

COMPLETE THE PAYMENT REQUEST

1. Click "Edit" at the top of the request page to complete

Payment Request
PRQ-0097

Navigator Entity: Hollywood Medical Center | Request Period: 2/10/2018 | Days Until Due Date: 10 | Submitted On Time: | Complete:

Click Edit to complete the request

Please click "Edit" to complete the request.

Navigator Entity: Hollywood Medical Center | Payment Request: PRQ-0097
Request Period: 2/10/2018 | Status: Draft

2. Complete all required fields and then click "Save" once completed.

1234561234

Send Warrant To

Grantee Name DBA ⁱ
Hollywood Medical Center

Street Address
Test Street

State
CA

Type
Reimbursement

Contact Name
Doogie Howser

City
Sacramento

Zip
66677-9988

* Amount Requested
\$1,500.00

Agreement

Agreement
I certify, under penalty of perjury under the laws of the State of California, that the above information is true and correct and that all costs for which reimbursement is requested herein were incurred in accordance with the above referenced California Health Benefit Exchange and Navigator Grant Program Agreement.

* Print Name
John Smith

Acknowledgement

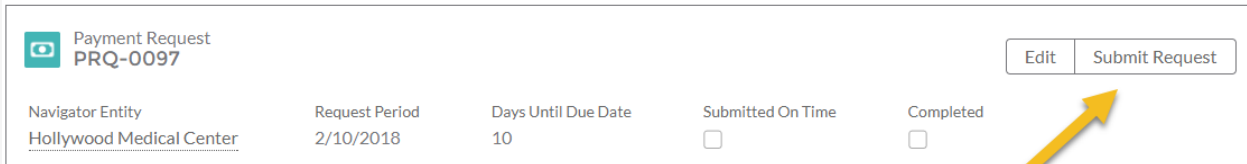
Cancel Save & New Save

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

SUBMIT REQUEST FOR APPROVAL

Once you have completed the request, click the “Submit Request” button to send the request to your Account Representative for review. You will have the option to add any additional comments.

1. Click Submit Request.



Payment Request
PRQ-0097

Navigator Entity: Hollywood Medical Center

Request Period: 2/10/2018

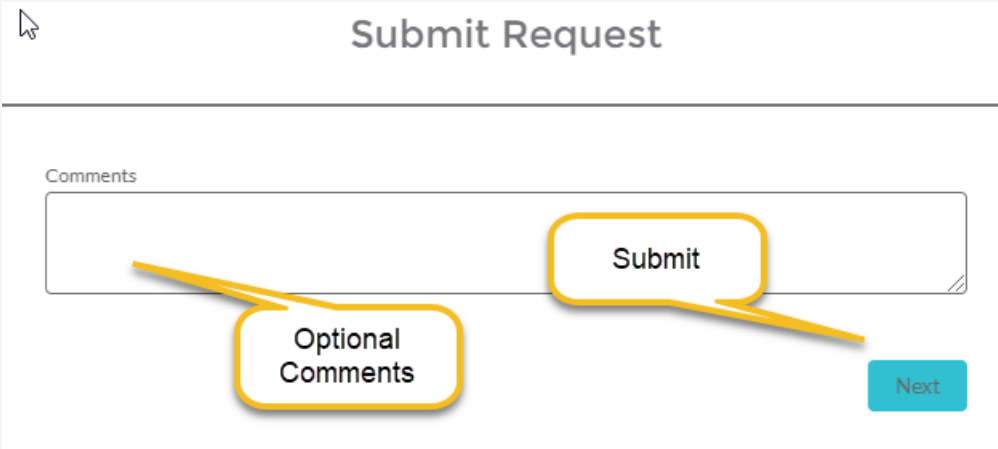
Days Until Due Date: 10

Submitted On Time:

Completed:

Edit Submit Request

2. Add any additional comments and click Next.



Submit Request

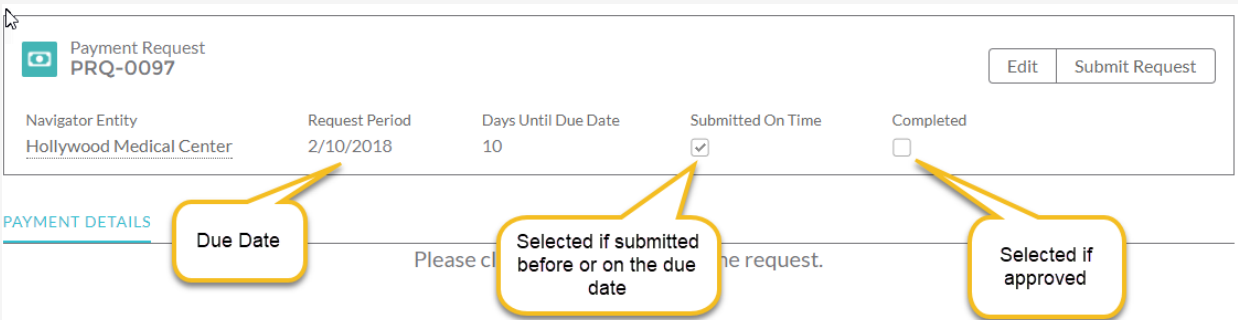
Comments

Optional Comments

Submit

Next

3. The Payment Request record will be updated with the submitter's information and there will be an Approval History related list with the status and currently assigned approver.



Payment Request
PRQ-0097

Navigator Entity: Hollywood Medical Center

Request Period: 2/10/2018

Days Until Due Date: 10

Submitted On Time:

Completed:

PAYMENT DETAILS

Due Date

Please click the **Submitted On Time** checkbox before submitting the request.

Selected if submitted before or on the due date

Selected if approved

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

Record updated with status information:

[MY ENTITY](#)
[COUNSELORS](#)
[COVEREDCA.COM](#)
[CONTACT SUPPORT](#)

Payment Request
PRQ-0097

[Edit](#)
[Submit Request](#)

Navigator Entity <u>Hollywood Medical Center</u>	Request Period 2/10/2018	Days Until Due Date 10	Submitted On Time <input checked="" type="checkbox"/>	Completed <input type="checkbox"/>
-----------------------------------------------------	-----------------------------	---------------------------	----------------------------------------------------------	---------------------------------------

[PAYMENT DETAILS](#) [APPROVAL](#)

Please click "Edit" to complete the request.

Navigator Entity <u>Hollywood Medical Center</u>	Payment Request PRQ-0097
Request Period 2/10/2018	Status Submitted
Grantee Name ⓘ Hollywood Medical	

Approval History is displayed on the Approval tab:

Payment Request
PRQ-0097

[Edit](#)
[Submit Request](#)

Navigator Entity <u>Hollywood Medical Center</u>	Request Period 2/10/2018	Days Until Due Date 10	Submitted On Time <input checked="" type="checkbox"/>	Completed <input type="checkbox"/>
-----------------------------------------------------	-----------------------------	---------------------------	----------------------------------------------------------	---------------------------------------

[PAYMENT DETAILS](#) [APPROVAL](#)

Approval History (2)

STEP NAME	DATE	STATUS	ASSIGNED TO
<u>Account Manager Approval</u>	1/31/2018 11:32 AM	Pending	
<u>Approval Request Submitted</u>	1/31/2018 11:32 AM	Submitted	Doogie Howser

[View All](#)

Notes (0)

Files (0) [Add Files](#)

Submitter name

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

FOLLOW-UP

You will receive a confirmation email upon submission of the request and for any status change moving forward. The Account Manager and Program Management Team will Approve or Reject your submission.

Email Subject: Navigator Grantee Payment Request – Submitted



Hello,

Your Bi-Monthly Payment Request has been updated to a status of **Submitted**.

The request can be accessed [HERE](#).

Thank you,
Covered CA

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

If the Payment Request is Approved by the Account Manager, you will receive a notification that the approval process is moving forward to the final step where the Program Management Team reviews the request for Approval / Rejection.

Email Subject: The Account Manager for [ENTITY NAME] has sent payment request [PAY REQ NUM] to Program Management for final evaluation prior to approval.



Hello,

Your payment request PRQ-0097 has been approved by the Account Manager. It will be reviewed by Program Management before making a final decision on the request submitted. No action is needed from you at this time.

Thank you,
Covered CA

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

If the Payment Request is Rejected by the Account Manager or the Program Management Team, you will receive a notification that the status changed to Rejected.

Email Subject: Navigator Grantee Payment Request – Rejected

|



Hello,

Your Bi-Monthly Payment Request has been updated to a status of **Rejected**.

The request can be accessed [HERE](#).

Thank you,
Covered CA

NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

Once the Payment Request is Approved by the Program Management Team you will receive a final notification along with any comments that can be supplied.



Hello,

Your Bi-Monthly Payment Request has been updated to a status of **Approved**.

The request can be accessed [HERE](#).

Thank you,
Covered CA

The Payment Request will be marked as Completed when Approved. If the request was rejected, you will have the ability to make updates to the request and Re-Submit for Approval.



Payment Request
PRQ-0097

Navigator Entity	Request Period	Days Until Due Date	Submitted On Time	Completed
Hollywood Medical Center	2/10/2018	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



NAVIGATOR BI-MONTHLY PAYMENT REQUESTS OVERVIEW

The Approval History related list will display the history of assigned approvers and statuses.

PAYMENT DETAILS APPROVAL

Approval History (3)			
STEP NAME	DATE	STATUS	ASSIGNED TO
Program Management Appro...	1/31/2018 11:53 AM	Approved	Program Management
Account Manager Approval	1/31/2018 11:48 AM	Approved	[Redacted]
Approval Request Submitted	1/31/2018 11:32 AM	Submitted	Doogie Howser

[Click to view full list](#) [View All](#)

Full approval history can be viewed with comments:

Payment Requests > PRQ-0097
Approval History

3 Items • Sorted by Is Pending, Date • Updated a few seconds ago

	STEP NAME	DATE	STATUS	ASSIGNED TO	ACTUAL APP...	COMMENTS
1	Program Management Approval	1/31/2018 11:53 AM	Approved	Program Management	[Redacted]	Final!
2	Account Manager Approval	1/31/2018 11:48 AM	Approved	[Redacted]	[Redacted]	Nice!
3	Approval Request Submitted	1/31/2018 11:32 AM	Submitted	Doogie Howser	Doogie Howser	Test submission