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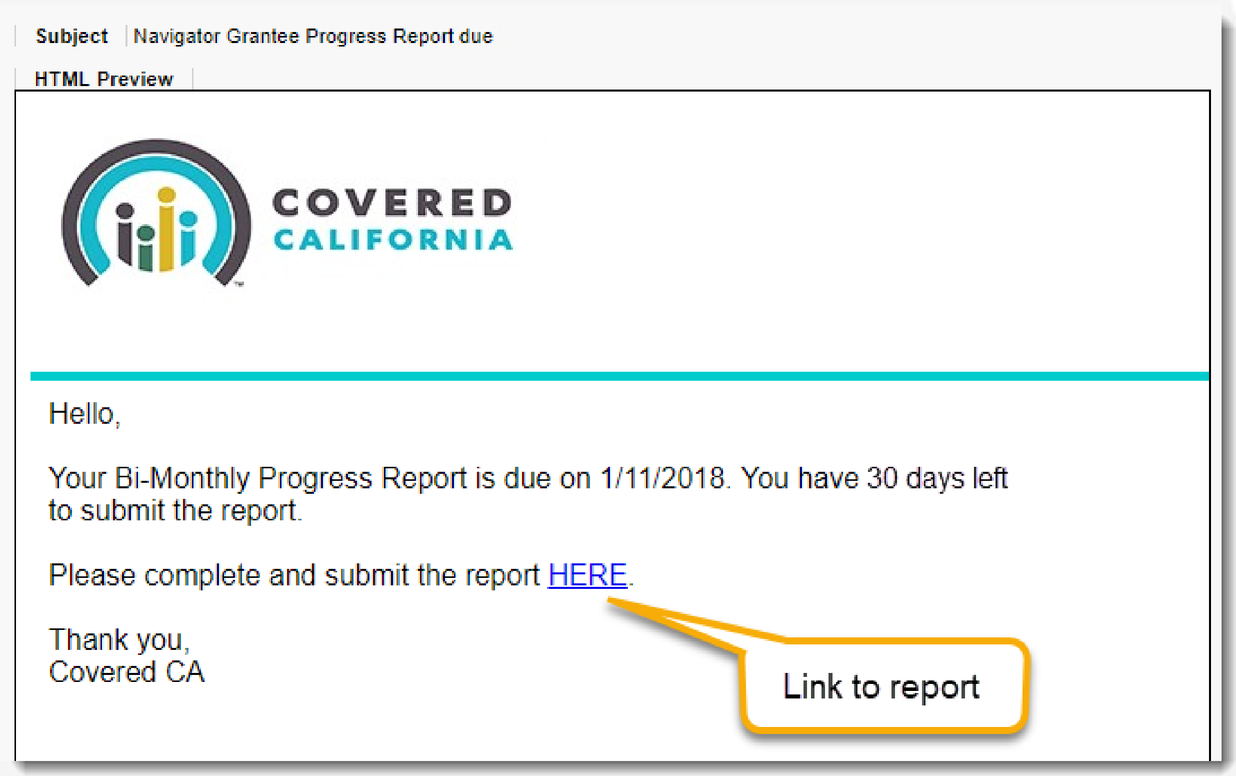
NAVIGATOR BI-MONTHLY PROGRESS REPORT

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

BI-MONTHLY PROGRESS REPORT NOTIFICATION

The Primary or Authorized Contact listed on the Entity is responsible for submitting a Bi-Monthly progress report. An email notification will be sent to the Entity business contacts 30 days prior to the due date with a link to access the report. A similar notification will be sent 10 and 5 days prior to the due date.


Subject Navigator Grantee Progress Report due

HTML Preview

COVERED CALIFORNIA

Hello,

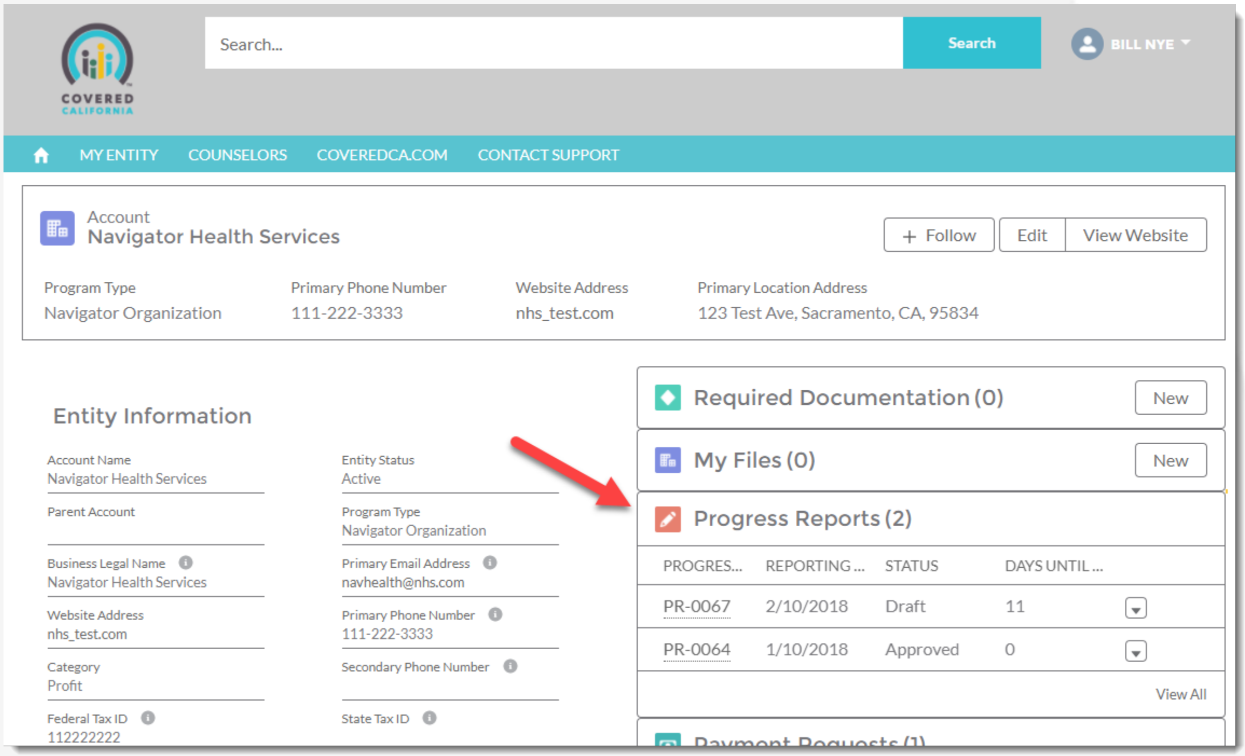
Your Bi-Monthly Progress Report is due on 1/11/2018. You have 30 days left to submit the report.

Please complete and submit the report HERE.

Thank you,
Covered CA

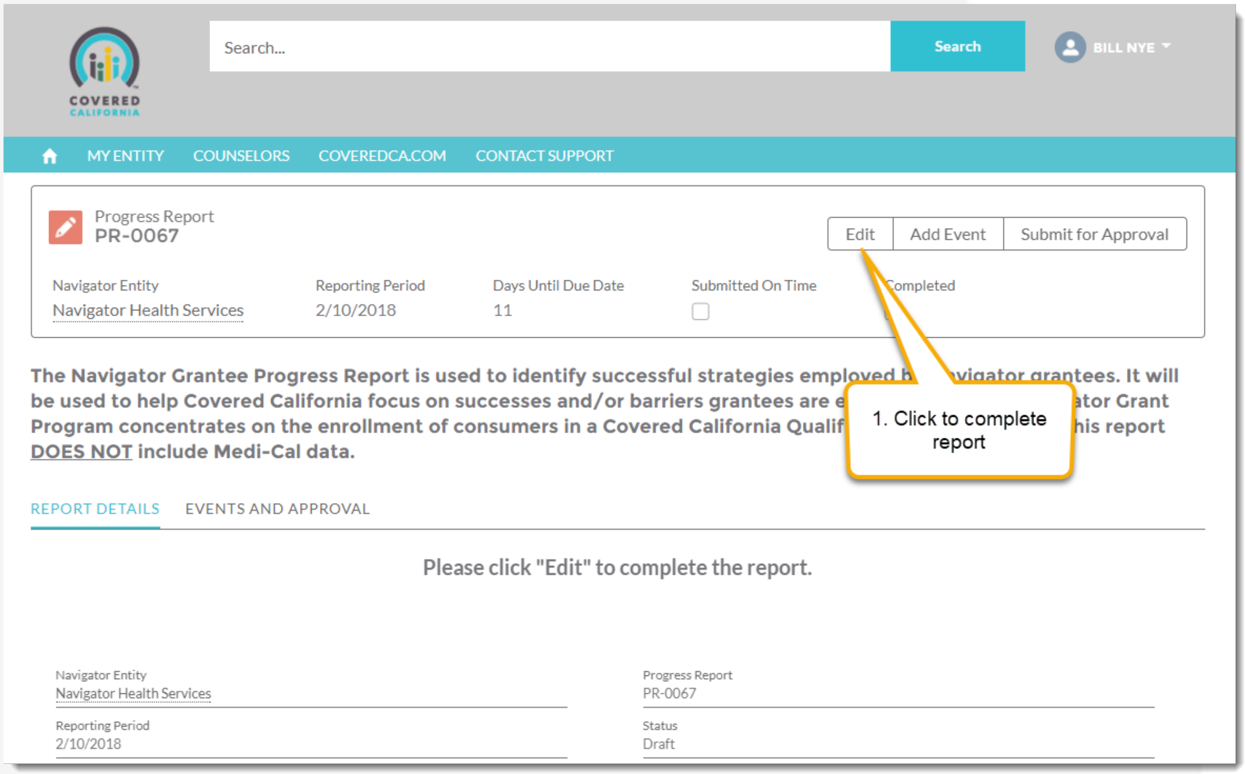
ACCESS YOUR PROGRESS REPORT

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

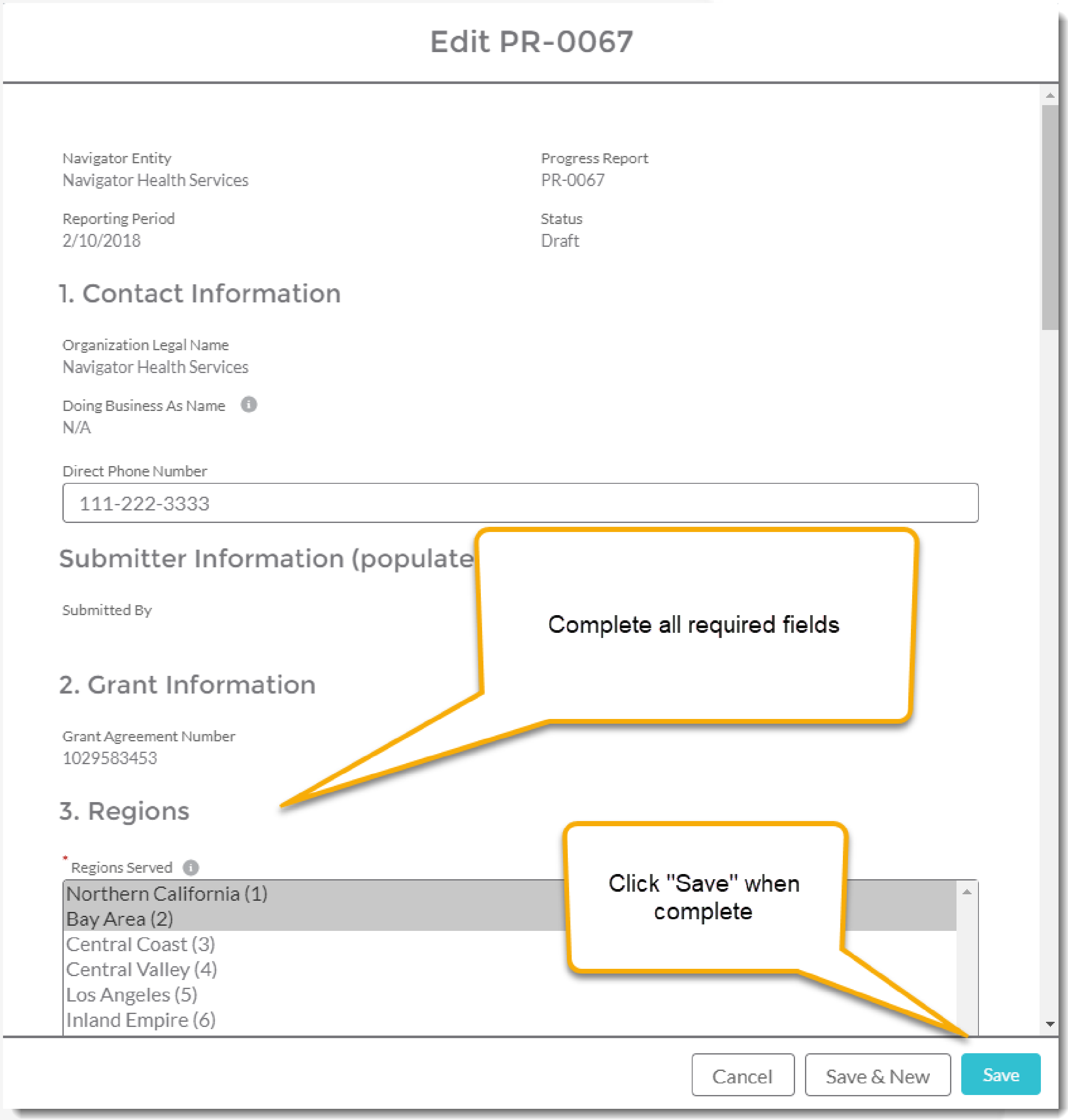


COMPLETE THE PROGRESS REPORT

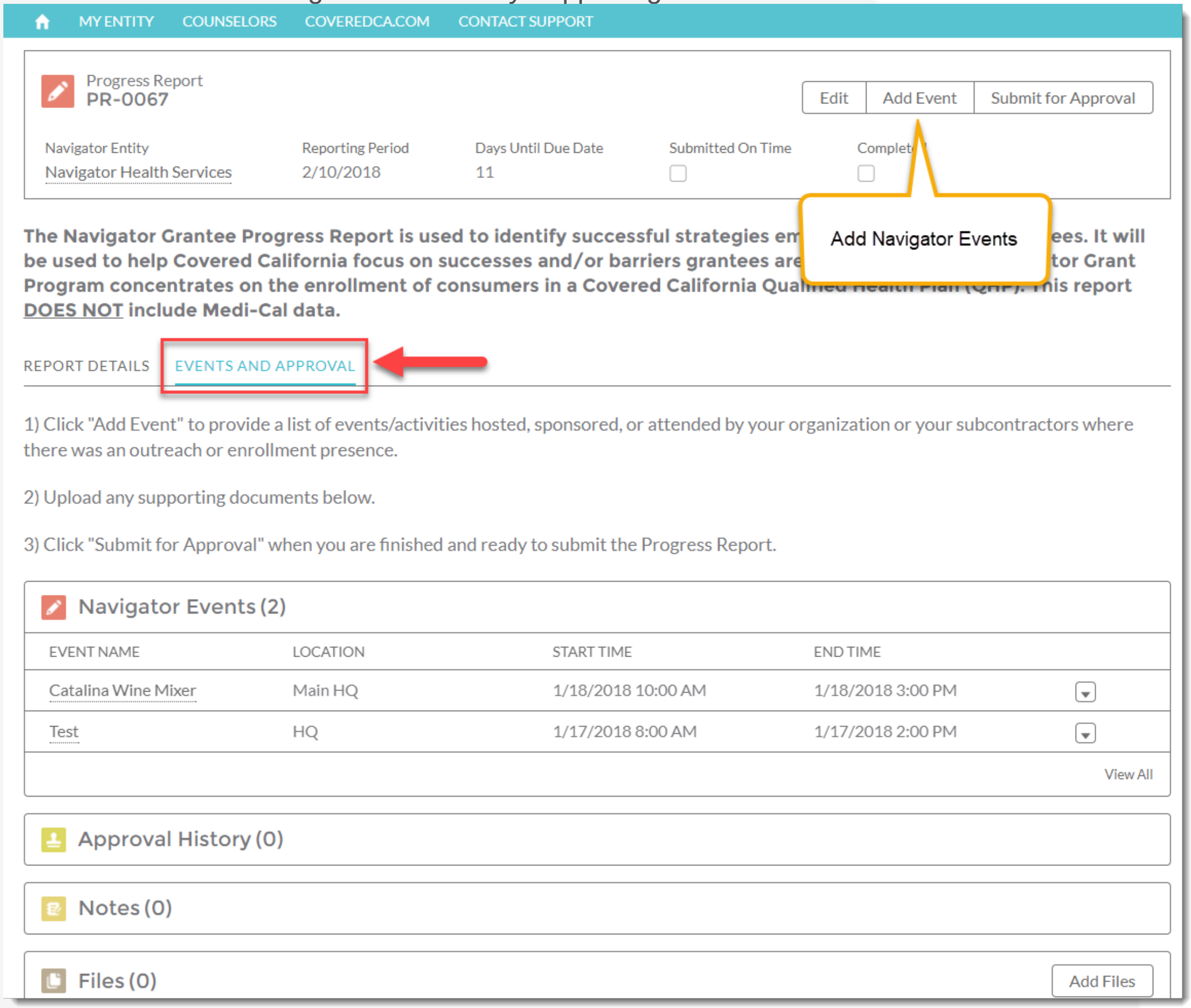
1. Click “Edit” at the top of the report page to complete



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


Edit PR-0067
Navigator Entity
Navigator Health Services
Progress Report
PR-0067
Reporting Period
2/10/2018
Status
Draft
1. Contact Information
Organization Legal Name
Navigator Health Services
Doing Business As Name
N/A
Direct Phone Number
111-222-3333
Submitter Information (populate
Submitted By
2. Grant Information
Grant Agreement Number
1029583453
3. Regions
* Regions Served
Northern California (1)
Bay Area (2)
Central Coast (3)
Central Valley (4)
Los Angeles (5)
Inland Empire (6)
Complete all required fields
Click "Save" when complete
Cancel
Save & New
Save

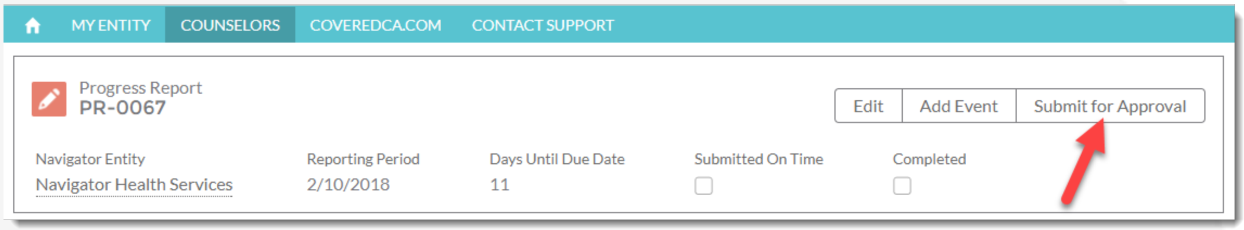
3. Once the report details are complete, navigate to the “Events and Approval” tab. Follow the instructions for adding events and any supporting documents.



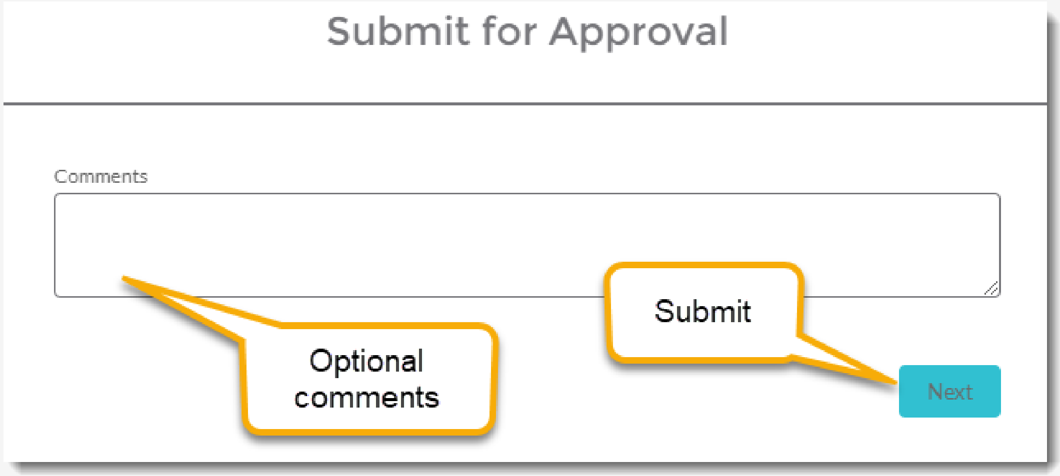
SUBMIT REPORT FOR APPROVAL

Once you have completed all sections of the report, click the “Submit for Approval” button to send the report to your Account Representative for review. You will have the option to add any additional comments.

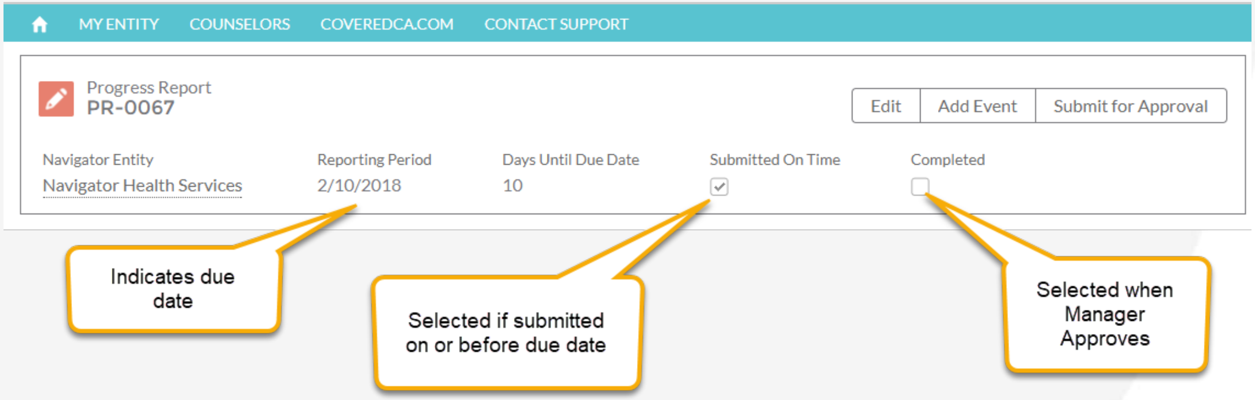
1. Click Submit for Approval.



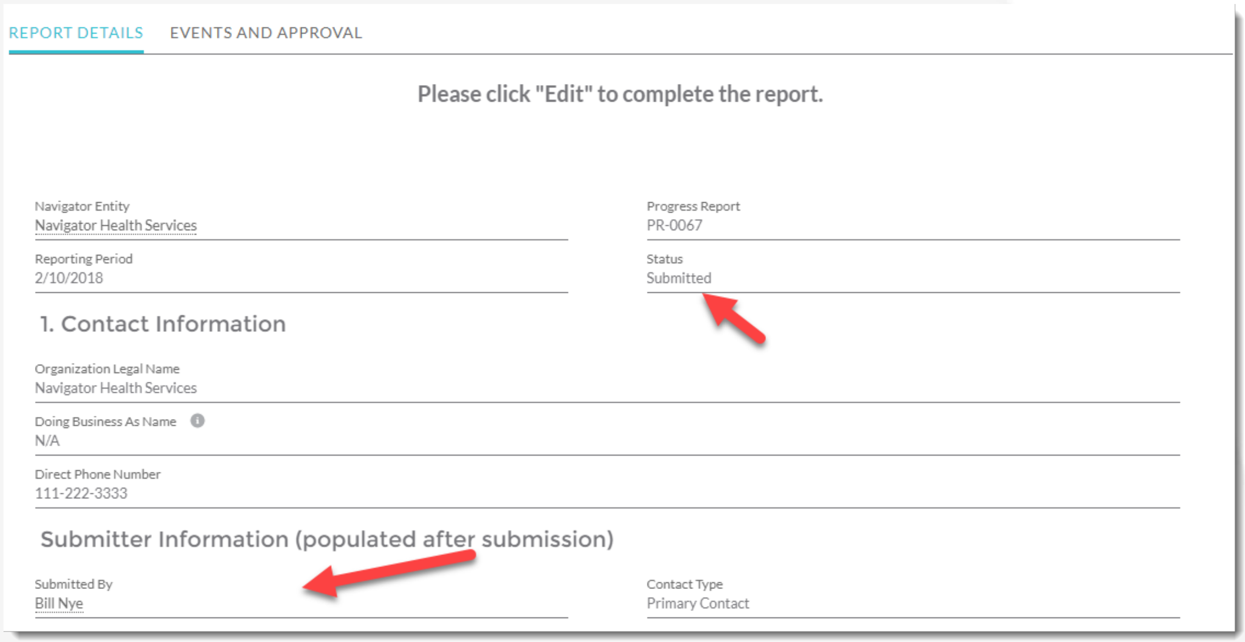
2. Add any additional comments and click Next.



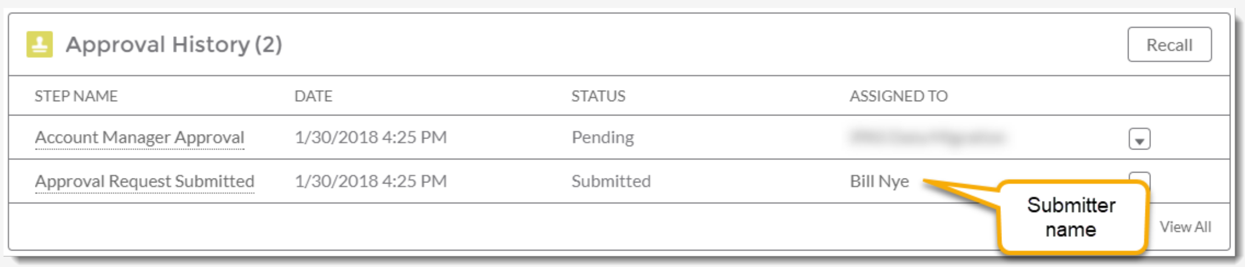
3. The progress report record will be updated with the submitter’s information and there will be an Approval History related list with the status and currently assigned approver.



Record updated with Submitter information:



Approval History is displayed on the Events and Approval tab:



FOLLOW-UP

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

COVERED CALIFORNIA

Hello,

Your Bi-Monthly Progress Report has been updated to a status of **Submitted**.

The report can be accessed HERE.

Thank you,
Covered CA

Once the Progress Report is Approved or Rejected by the Account Manager, you will receive a final notification along with any comments that can be supplied.

COVERED CALIFORNIA

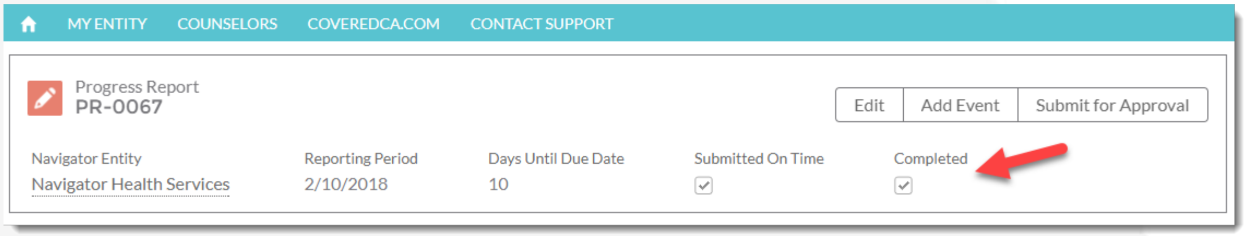
Hello,

Your Bi-Monthly Progress Report has been updated to a status of **Approved**.

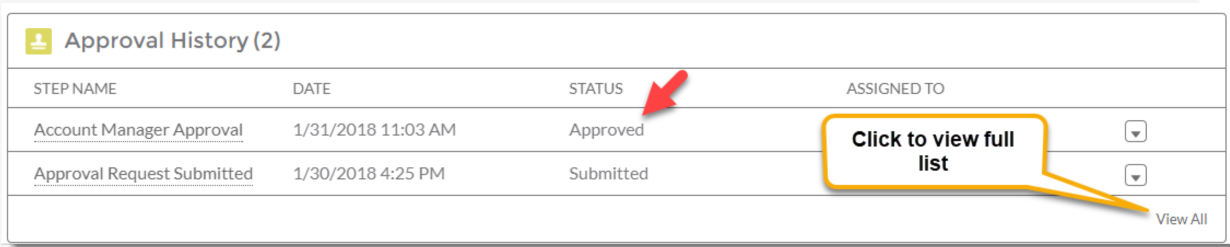
The report can be accessed HERE.

Thank you,
Covered CA

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



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



Full approval history can be viewed with comments: