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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




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



Link to report

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

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.

Account: Navigator Health Services

Program Type: Navigator Organization | Primary Phone Number: 111-222-3333 | Website Address: nhs_test.com | Primary Location Address: 123 Test Ave, Sacramento, CA, 95834

Entity Information

| | |
|--|--|
| Account Name: Navigator Health Services | Entity Status: Active |
| Parent Account: | Program Type: Navigator Organization |
| Business Legal Name: Navigator Health Services | Primary Email Address: navhealth@nhs.com |
| Website Address: nhs_test.com | Primary Phone Number: 111-222-3333 |
| Category: Profit | Secondary Phone Number: |
| Federal Tax ID: 112222222 | State Tax ID: |

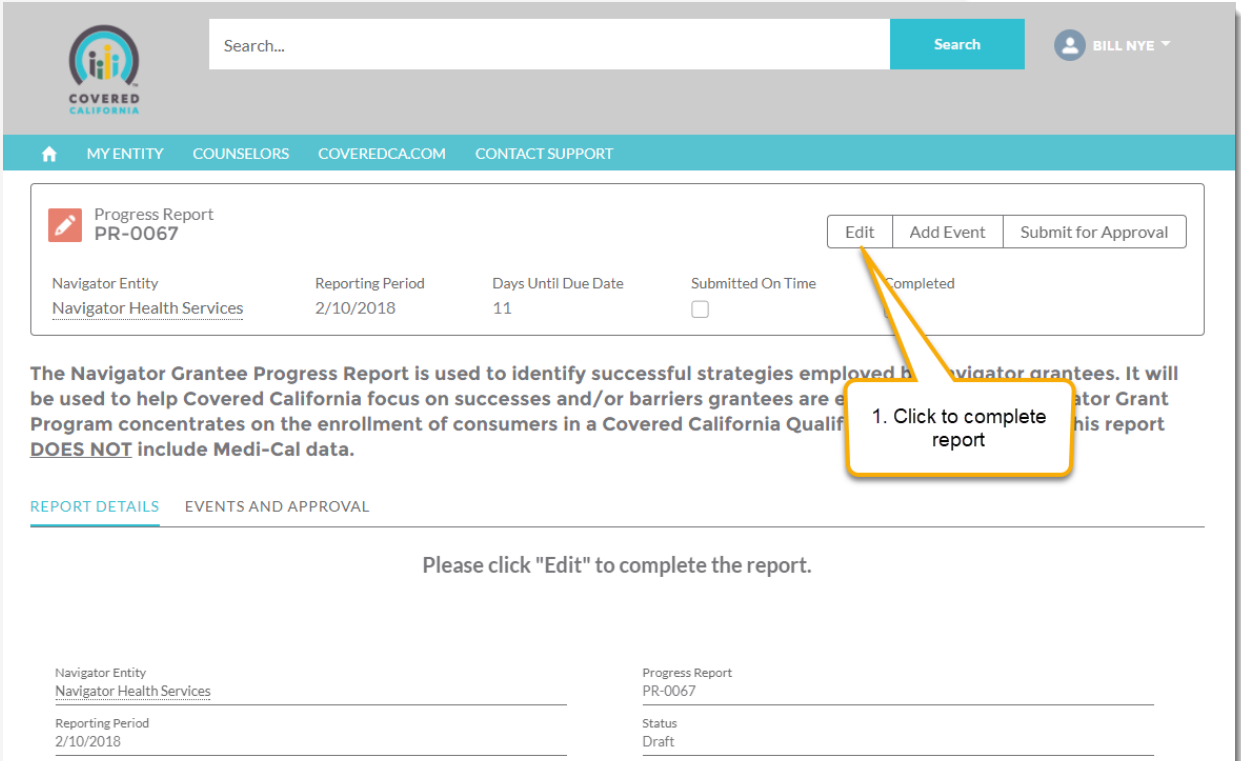
Progress Reports (2)

| PROGRES... | REPORTING ... | STATUS | DAYS UNTIL ... |
|------------|---------------|----------|----------------|
| PR-0067 | 2/10/2018 | Draft | 11 |
| PR-0064 | 1/10/2018 | Approved | 0 |

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

COMPLETE THE PROGRESS REPORT

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



Progress Report PR-0067

| | | | | |
|---|-------------------------------|---------------------------|---|-----------|
| Navigator Entity Navigator Health Services | Reporting Period 2/10/2018 | Days Until Due Date 11 | Submitted On Time <input type="checkbox"/> | Completed |
|---|-------------------------------|---------------------------|---|-----------|

The Navigator Grantee Progress Report is used to identify successful strategies employed by navigator grantees. It will be used to help Covered California focus on successes and/or barriers grantees are experiencing. The Navigator Grant Program concentrates on the enrollment of consumers in a Covered California Qualified Health Plan. This report DOES NOT include Medi-Cal data.

[REPORT DETAILS](#) [EVENTS AND APPROVAL](#)

Please click "Edit" to complete the report.

| | |
|---|----------------------------|
| Navigator Entity Navigator Health Services | Progress Report PR-0067 |
| Reporting Period 2/10/2018 | Status Draft |

- 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

Submitter Information (populate)

Submitted By

Complete all required fields

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)

Click "Save" when complete

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

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

Progress Report PR-0067

Navigator Entity: Navigator Health Services | Reporting Period: 2/10/2018 | Days Until Due Date: 11 | Submitted On Time: | Complete:

REPORT DETAILS | **EVENTS AND APPROVAL** | [Add Navigator Events](#)

1) Click "Add Event" to provide a list of events/activities hosted, sponsored, or attended by your organization or your subcontractors where there was an outreach or enrollment presence.

2) Upload any supporting documents below.

3) Click "Submit for Approval" when you are finished and ready to submit the Progress Report.

| EVENT NAME | LOCATION | START TIME | END TIME | |
|---------------------|----------|--------------------|-------------------|---|
| Catalina Wine Mixer | Main HQ | 1/18/2018 10:00 AM | 1/18/2018 3:00 PM | ▼ |
| Test | HQ | 1/17/2018 8:00 AM | 1/17/2018 2:00 PM | ▼ |

View All

Approval History (0)

Notes (0)

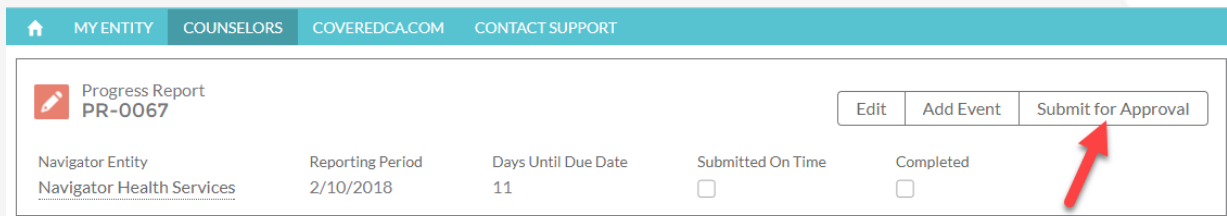
Files (0) [Add Files](#)

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

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.

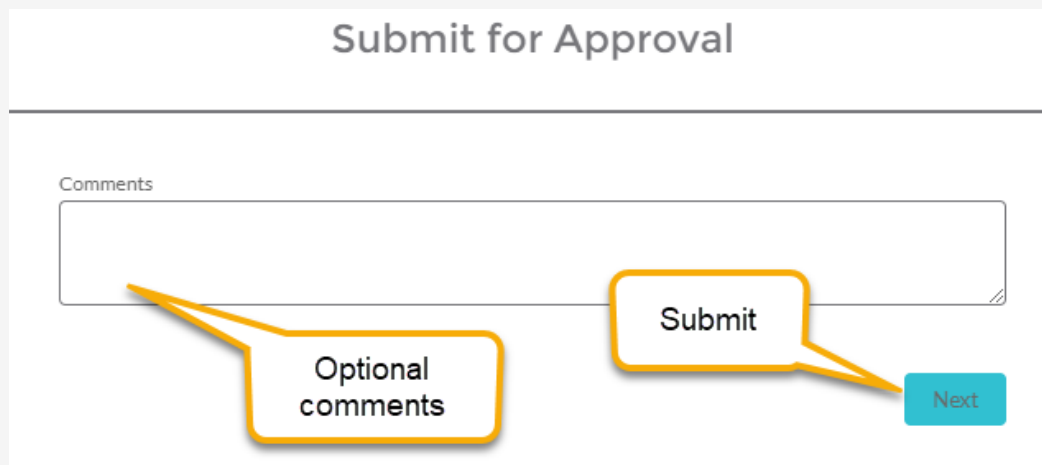


Progress Report PR-0067

Navigator Entity: Navigator Health Services | Reporting Period: 2/10/2018 | Days Until Due Date: 11 | Submitted On Time: | Completed:

Buttons: Edit, Add Event, **Submit for Approval**

2. Add any additional comments and click Next.



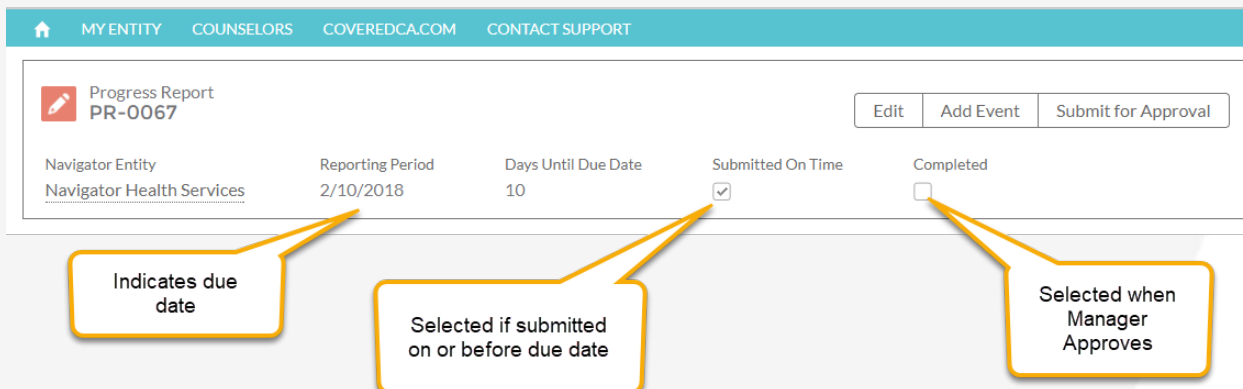
Submit for Approval

Comments

Submit

Optional comments

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.



Progress Report PR-0067

Navigator Entity: Navigator Health Services | Reporting Period: 2/10/2018 | Days Until Due Date: 10 | Submitted On Time: | Completed:

Buttons: Edit, Add Event, Submit for Approval

Indicates due date

Selected if submitted on or before due date

Selected when Manager Approves

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

Record updated with Submitter information:

REPORT DETAILS EVENTS AND APPROVAL

Please click "Edit" to complete the report.

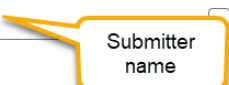
| | |
|---|--|
| <p>Navigator Entity Navigator Health Services</p> <hr/> <p>Reporting Period 2/10/2018</p> <hr/> <p>1. Contact Information</p> <p>Organization Legal Name Navigator Health Services</p> <hr/> <p>Doing Business As Name ⓘ N/A</p> <hr/> <p>Direct Phone Number 111-222-3333</p> <hr/> <p>Submitter Information (populated after submission)</p> <p>Submitted By Bill Nye</p> | <p>Progress Report PR-0067</p> <hr/> <p>Status Submitted</p> <hr/> <p>Contact Type Primary Contact</p> |
|---|--|



Approval History is displayed on the Events and Approval tab:

| Approval History (2) Recall | | | |
|--|-------------------|-----------|---|
| STEP NAME | DATE | STATUS | ASSIGNED TO |
| Account Manager Approval | 1/30/2018 4:25 PM | Pending | [Redacted] ▼ |
| Approval Request Submitted | 1/30/2018 4:25 PM | Submitted | Bill Nye □ |
| | | | View All |

Submitter name



NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

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.



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.



Hello,

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

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

Thank you,
Covered CA

NAVIGATOR BI-MONTHLY PROGRESS REPORT OVERVIEW

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.

Home MY ENTITY COUNSELORS COVEREDCA.COM CONTACT SUPPORT

Progress Report PR-0067 Edit Add Event Submit for Approval

| | | | | |
|---------------------------|------------------|---------------------|-------------------------------------|-------------------------------------|
| Navigator Entity | Reporting Period | Days Until Due Date | Submitted On Time | Completed |
| Navigator Health Services | 2/10/2018 | 10 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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

Approval History (2)

| STEP NAME | DATE | STATUS | ASSIGNED TO |
|--|--------------------|-----------|--------------------------|
| Account Manager Approval | 1/31/2018 11:03 AM | Approved | <input type="checkbox"/> |
| Approval Request Submitted | 1/30/2018 4:25 PM | Submitted | <input type="checkbox"/> |

Click to view full list View All

Full approval history can be viewed with comments:

Progress Reports > PR-0067
Approval History

2 items • Sorted by Is Pending, Date • Updated a few seconds ago Settings Refresh

| | STEP NAME | DATE | STATUS | ASSIG... | ACTUAL A... | COMMENTS |
|---|----------------------------|------------------|-----------|-------------|-----------------|-------------------------------|
| 1 | Account Manager Appro... | 1/31/2018 11:... | Approved | IPAS Dat... | IPAS Data Mi... | <input type="checkbox"/> |
| 2 | Approval Request Submit... | 1/30/2018 4:2... | Submitted | Bill Nye | Bill Nye | test <input type="checkbox"/> |