TABLE OF CONTENTS
Navigator Bi-Monthly Progress Report................................................................. 2
Complete a Progress Report.................................................................................. 2
Progress Report Approval Process ...................................................................... 8
  Approval of the Progress Report....................................................................... 8
  Rejection of the Progress Report...................................................................... 8
NAVIGATOR BI-MONTHLY PROGRESS REPORT

The Primary or Authorized Contact listed on the Entity is responsible for submitting a Bi-Monthly progress report. This document outlines all features and functions available to submitting Navigator Bi-Monthly Progress Reports in the Certification Portal.

COMPLETE A PROGRESS REPORT

1. An email notification will be sent to the Entity business contacts 30 days prior to the Progress Report due date with a link to access the report. A similar notification will be sent 10 and 5 days prior to the due date.

Navigate to the Progress Report via the link provided in the email or from the Progress Reports list on the Entity Account page.
2. Click the **Edit** button at the top of the report page.

3. A new window will pop-up allowing Entity contacts to begin completing the Progress Report.

Below are definitions and additional clarifications regarding certain sections within the Progress Report:

#4. All fields in #4 (4a – 4c), except for Other, are numbers **only**.

4. Enter the number of times the Entity provided services to consumers

Complete for all enrollment periods

All fields for 4a – 4c, except for Other, are numbers only
#4 continued. For all three reporting periods (4a-4c), Outreach and Education, Enrollment Assistance > Walk-in, and Enrollment Assistance > Appointment is a count of consumers who were delegated before they effectuated.

Enrollment Assistance > Walk-in vs. Appointment

Entities may be able to identify multiple options for the same consumer; however, each consumer may only be counted once.

For example, an Entity could assist a consumer at the office which is also a storefront, or during an event that takes place on the storefront property, etc. The Entity can choose the option that best identifies how the consumer was assisted. The only exception is if assistance was provided over the phone in the Entity’s office, during an event, or at a storefront. In this case, make sure to mark this activity as ‘Over the Phone’ only.
For all three reporting periods (4a-4c), **Case Management > Report a Change** and **Document Upload (no change reported)** is a count of consumers who were delegated *after* they effectuated.

This will help Covered California gather data on consumers that are not reflected in the monthly Navigator Program Productivity Report.

**Open Enrollment > Case Management > Report a change**
- *Get Married or Divorced*
- *Have a child or adopt a child*
- *Have a change in income*

**Open Enrollment > Document Upload (no change reported)**
- *Identity*
- *Social Security Number*
- *Income*
- *Minimum Essential Coverage*
- *Citizenship or U.S. National*
- *Immigration Status or Lawful Presence*
- *Not Incarcerated*

#12. Targeted populations are detailed in the Entity application. If there is a change or update to an Entity’s targeted populations or regions, please notify the Entity’s designated Covered California Account Service Representative.

12. Were you able to reach your targeted population:

- Yes
- No

If no, what strategies can be improved
4. Complete all required fields and then click **Save** once completed.

A message will appear once the Progress Report has been successfully saved. **Please Note:** The Progress Report has not yet been submitted for approval. See next step.

5. Review all fields on the Progress Report before submitting. Once the information is confirmed as accurate, click the **Submit for Approval** button on the Report page.
6. A screen will be presented where the user can enter comments. Comments entered here are for the Reviewer to read prior to making any decision in the approval process. Click Next to submit the Progress Report for approval.

7. The Entity will receive an email notification of the Progress Report submission. The Entity can use the link provided in the email to review the Progress Report and check on its approval status.

---

Hello,

Your Progress Report was successfully submitted for review. You will be notified once it has been reviewed and there is a status update. You can log into Salesforce by clicking HERE at any time to access your account and review the information you submitted.

Thank you,

Covered California

Outreach & Sales Team
**PROGRESS REPORT APPROVAL PROCESS**

When a Progress Report is submitted for approval it is assigned to an Account Services Team. The Account Services Representative and Management will review the Progress Report and approve / reject the Progress Report. A comment box is provided to the Account Services Team to provide any additional comments to the Entity.

**APPROVAL OF THE PROGRESS REPORT**

If the Progress Report is approved, the Progress Report is considered complete. The Entity will receive an email notification of the approved Progress Report with corresponding comments, if applicable.

---

Hello,

Please review the Progress Report that has been updated to a status of Approved.

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

Thank you,

Covered California
Outreach & Sales Team

---

**REJECTION OF THE PROGRESS REPORT**

If the Progress Report is rejected the record’s status is reset to Draft and unlocked for editing and re-submission. The Entity will receive an email notification of the rejected Progress Report with corresponding comments and can edit and re-submit the Progress Report for approval.
Hello,

Covered California has returned the status of your Progress Report to draft due to missing or incomplete information.

Approver Comments: You answered “Yes” to question #7 “Are there best practices you will be changing or updating, moving forward? Please provide a detailed description regarding what you plan to change in order to achieve your goals.

Please log into Salesforce (LINK) to access your Strategic Workplan so you can update and resubmit the workplan.

Thank you,
Covered California
Outreach & Sales Team