



TABLE OF CONTENTS

Review Site Visit Checklists..... 2
My Entity Page 2
Location Page 3
Site Visit Checklist..... 4

NAVIGATOR SITE VISIT OVERVIEW

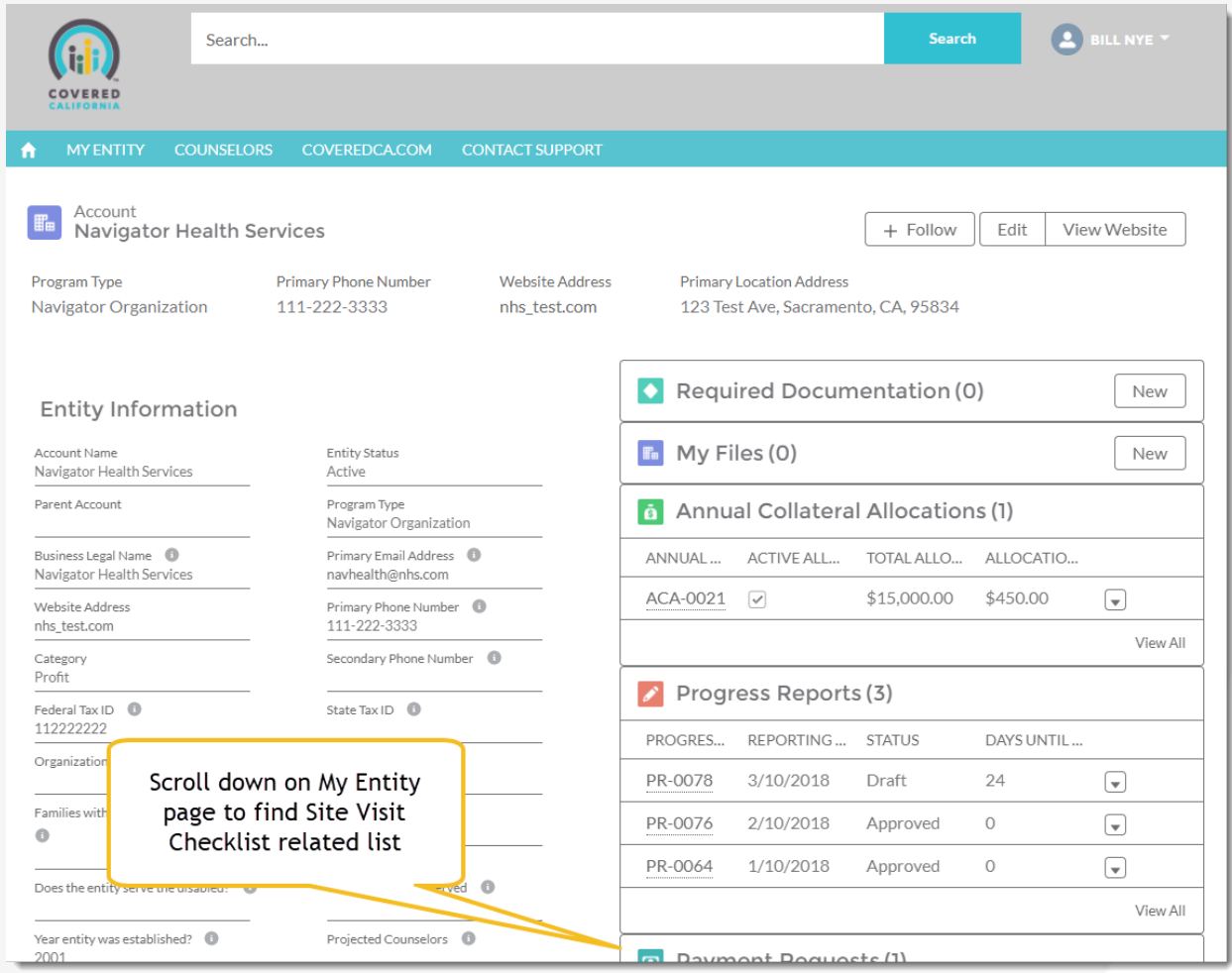
This document outlines the process of viewing Site Visit Checklists in the Certification Portal.

REVIEW SITE VISIT CHECKLISTS

Your Account Manager will periodically perform a site visit for each site location and will complete a Site Visit Checklist. You can view the Site Visit Checklists from the My Entity page as well as on each Location record.

MY ENTITY PAGE

There is a Site Visit Checklist related list located on the My Entity page. This will list all site visits for all Locations.



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
 Parent Account: _____
 Business Legal Name: Navigator Health Services
 Website Address: nhs_test.com
 Category: Profit
 Federal Tax ID: 112222222
 Organization: _____
 Families with: _____
 Does the entity serve the disabled: _____
 Year entity was established: 2001

Entity Status: Active
 Program Type: Navigator Organization
 Primary Email Address: navhealth@nhs.com
 Primary Phone Number: 111-222-3333
 Secondary Phone Number: _____
 State Tax ID: _____

Required Documentation (0)

My Files (0)

Annual Collateral Allocations (1)

ANNUAL ...	ACTIVE ALL...	TOTAL ALLO...	ALLOCATIO...
ACA-0021	<input checked="" type="checkbox"/>	\$15,000.00	\$450.00

Progress Reports (3)

PROGRES...	REPORTING ...	STATUS	DAYS UNTIL ...
PR-0078	3/10/2018	Draft	24
PR-0076	2/10/2018	Approved	0
PR-0064	1/10/2018	Approved	0

Payment Requests (1)

Related List on My Entity page:

Grant Details

Entity recipient of grant funding? **Yes**

Granting Program/Organization **CA Grant**

Grantee Name **Bill Nye**

Grantee City **Sacramento**

Grantee Zip **95834**

Entity Contacts

Primary Contact **Bill Nye**

Authorized Contact **Bill Nye**

CalHEERS

CalHEERS Username

CalHEERS Password

PRQ-0091 2/10/2018 Draft 0 View All

Locations (1)

LOCATIO...	CONTACT FI...	CONTACT L...	PHONE NU...
<u>NHS Main</u>	Bill	Nye	111-222-3...


Site Visit Checklists (4)

SITE VISIT	DATE OF SIT...	LOCATION O...	STATUS
<u>SV-0010</u>	2/9/2018 1...	NHS Main	Complete
<u>SV-0005</u>	1/25/2018 ...	NHS Main	Submitted
<u>SV-0004</u>	1/25/2018 ...	NHS Main	Complete
<u>SV-0002</u>	1/24/2018 ...	NHS Main	Complete

View All

LOCATION PAGE

The Site Visit Checklist related list on a Location record will list all site visits for the location that is viewed.



Search
BILL NYE

MY ENTITY
COUNSELORS
COVEREDCA.COM
CONTACT SUPPORT

Location NHS Main Edit

Physical City: Sacramento | Physical State: CA | Physical Zip Code: 95834

Estimated number of individuals served: 100

Record Type: Primary Location

Location Details

Location Name: NHS Main

Contact First Name: Bill

Email Address: bnye@nhs.com

Phone Number: 111-222-3333

Will organization accept referrals?: No

Entity: Navigator Health Services

Contact Last Name: Nye

Secondary Phone Number:

County: Sacramento

Hours of Operation

Site Served (0) New

Sub... (0) New Sub Site Location


Site Visit Checklists (4)

SITE V...	DATE OF...	STATUS
<u>SV-0...</u>	2/9/20...	Complete
<u>SV-0...</u>	1/25/2...	Submitt...
<u>SV-0...</u>	1/25/2...	Complete
<u>SV-0...</u>	1/24/2...	Complete


View All

SITE VISIT CHECKLIST

The Site Visit Checklist record will display all the details of the site visit that was completed by your Account Manager. The record is read-only.



Search

 **BILL NYE** ▾

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

Site Visit SV-0010	Location of Visit NHS Main
Status Complete	Date of Site Visit 2/9/2018 11:15 AM


Site Visit Attendees

Primary Contact Bill Nye	Presence Present
Authorized Contact Bill Nye	Presence Present
Any Other Delegated Contacts ⓘ N/A	

Checklist

Reviewed Current Work Plan with Grantee Yes	
Campaign Strategy Has Been Reviewed Yes	
Productivity Report Review With Contact ⓘ Yes	
Verify Subcontractors Yes	
# of Subcontractors 4	
Reviewed KP Collateral Process ⓘ Yes	
Identified Tool Kits Available ⓘ Yes	
Discussed Strategies for Those Affected ⓘ Yes	
Events Posted on Event Portal Yes	
Storefronts Posted on Website and Verify ⓘ Yes	
Review Certification Portal and Job Aid ⓘ Yes	
Reviewed Authorization Form Procedure Yes	
CAP in Past 12 Months? (Review Findings) Yes	
Reviewed STD204 Form and Payment Request ⓘ Yes	

Summary

Comments to Entity ⓘ Sample feedback comments public to the Entity	
Created By Sales Rep , 2/9/2018 11:17 AM	Last Modified By  IPAS Data Migration , 2/9/2018 12:43 PM

March 2018

4 | Page