Covered California

Task Guide

Navigator Bi-Monthly Progress Report

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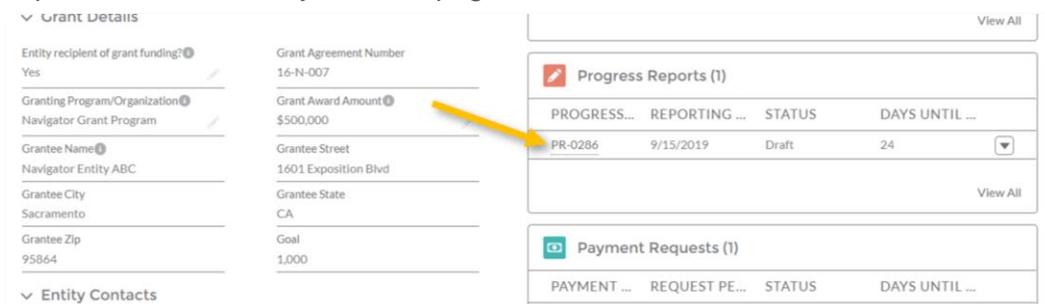
NAVIGATOR BI-MONTHLY PROGRESS REPORT

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.

COVERED CALIFORNIA

Hello,

Your Bi-Monthly Progress Report is due on 9/15/2019. You have 10 days left to submit the report.

Please complete and submit the report HERE.

Thank you,
Covered CA

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:

PLEASE NOTE:
- All fields must be saved prior to submitting, or approval of your Progress Report may be delayed.
- Section 4a. – 4c. requests information pertaining to your outreach, education, and enrollment assistance activites selected for any of the reporting periods below. These section(s) will capture categories with optional narrative and does not require reporting metrics.

4. Complete all required fields and then click **Save** once completed.
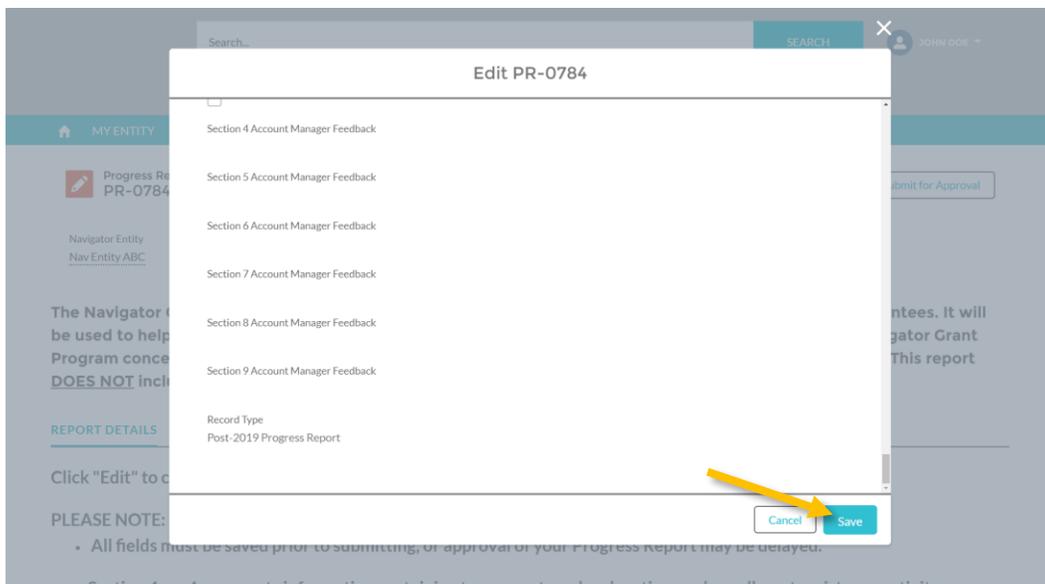
A message will appear once the Progress Report has been successfully saved.
Please Note: The Progress Report has not yet been submitted for approval. See next step.

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.
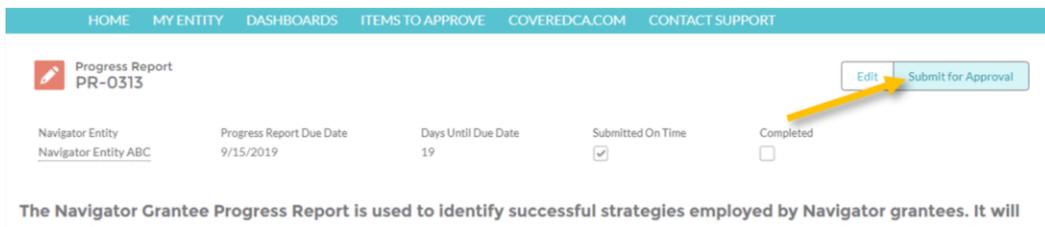
6. A screen will be presented where the user can enter comments. Comments entered here are for the Reviewer to read prior to making any decision in the approval process. Click **Next** to submit the Progress Report for approval.

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.
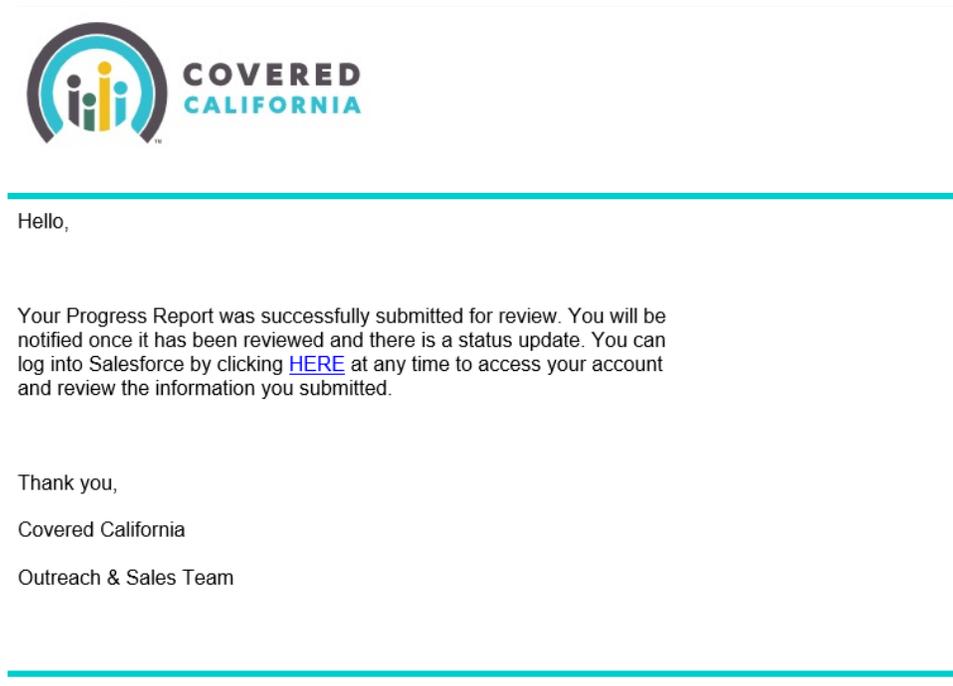
PROGRESS REPORT APPROVAL PROCESS

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.

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