TABLE OF CONTENTS
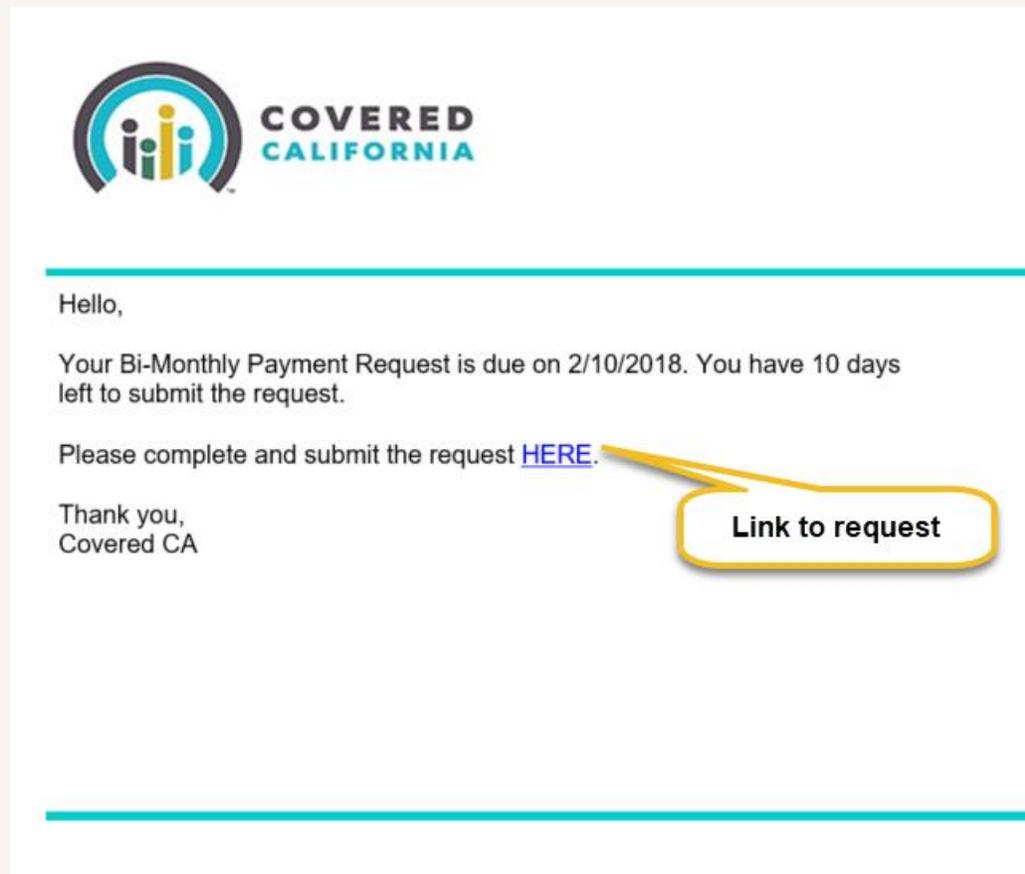
NAVIGATOR BI-MONTHLY PAYMENT REQUESTS

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

BI-MONTHLY PAYMENT REQUEST NOTIFICATION

The Primary or Authorized Contact listed on the Entity is responsible for submitting a Bi-Monthly Payment Request. An email notification will be sent to the Entity business contacts 10 days prior to the due date with a link to access the request. A similar notification will be sent 5 and 1 day prior to the due date.
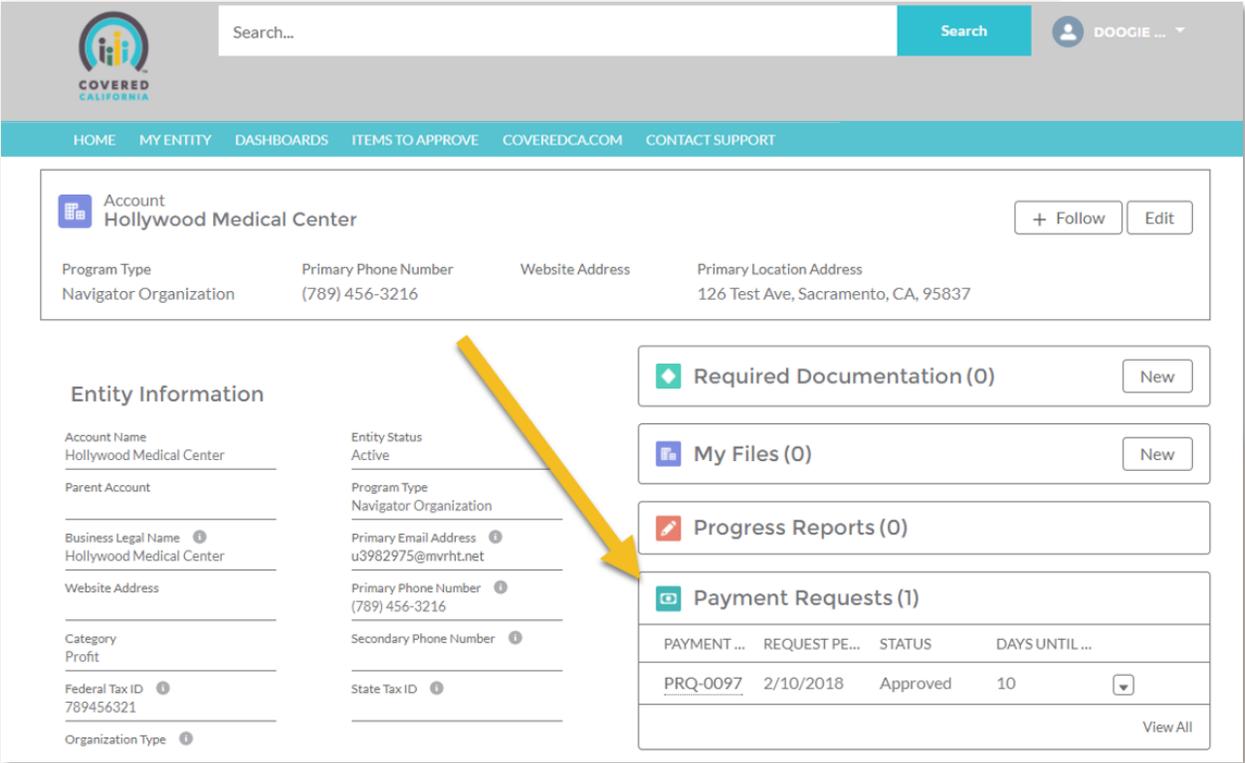
Email Subject: Navigator Grant Payment Request due in 10 days

ACCESS YOUR PAYMENT REQUEST

To access the Payment Request, click the link in the email notification to navigate to the record in the Certification Portal. You can view all your Payment Requests from the My Entity home page.
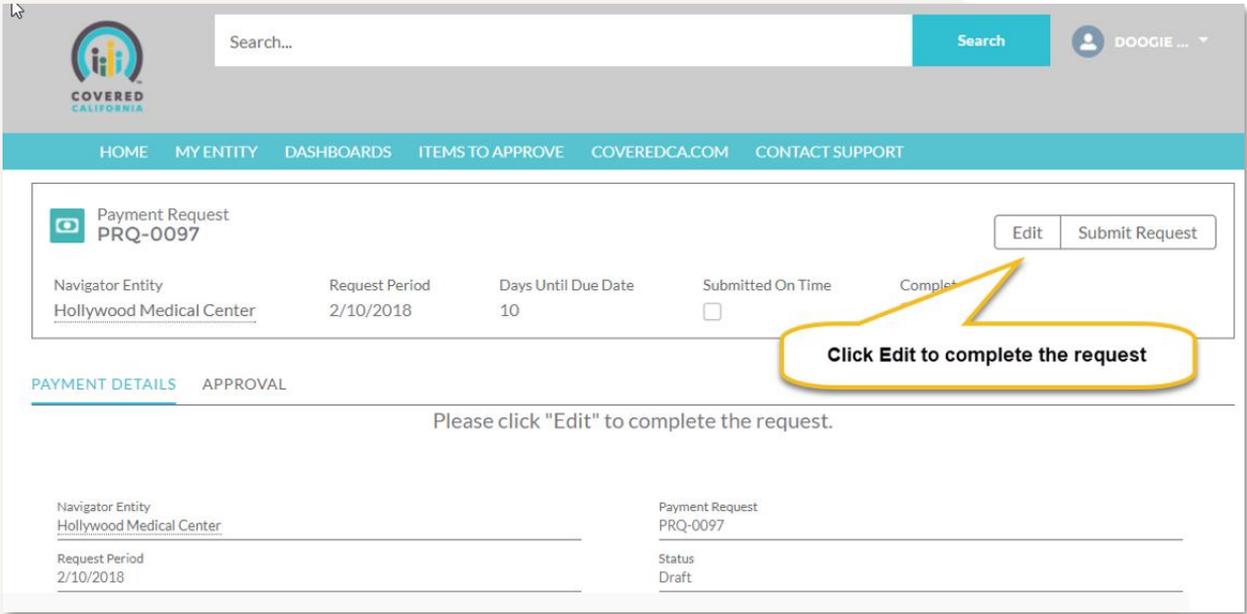
COMPLETE THE PAYMENT REQUEST

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

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

1234561234

Send Warrant To

Grantee Name DBA ⓘ	Contact Name
Hollywood Medical Center	Doogie Howser
Street Address	City
Test Street	Sacramento
State	Zip
CA	66677-9988
Type	* Amount Requested
Reimbursement	$1,500.00

Agreement

Agreement
I certify, under penalty of perjury under the laws of the State of California, that the above information is true and correct and that all costs for which reimbursement is requested herein were incurred in accordance with the above referenced California Health Benefit Exchange and Navigator Grant Program Agreement.
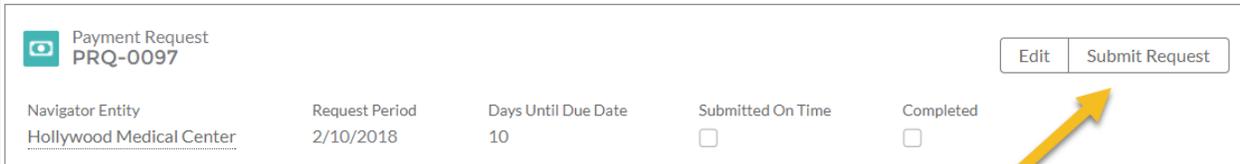
* Print Name
John Smith

Acknowledgement
☑

Cancel   Save & New   Save

SUBMIT REQUEST FOR APPROVAL

Once you have completed the request, click the "Submit Request" button to send the request to your Account Representative for review. You will have the option to add any additional comments.
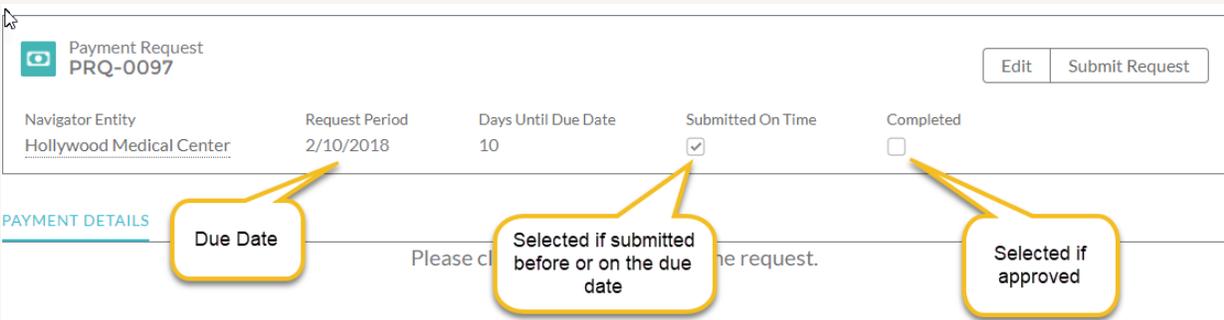
1. Click Submit Request.

2. Add any additional comments and click Next.

3. The Payment Request 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 status information:

Approval History is displayed on the Approval tab:

FOLLOW-UP

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

Email Subject: Navigator Grantee Payment Request – Submitted

If the Payment Request is Approved by the Account Manager, you will receive a notification that the approval process is moving forward to the final step where the Program Management Team reviews the request for Approval / Rejection.

Email Subject: The Account Manager for [ENTITY NAME] has sent payment request [PAY REQ NUM] to Program Management for final evaluation prior to approval.

Hello,

Your payment request PRQ-0097 has been approved by the Account Manager. It will be reviewed by Program Management before making a final decision on the request submitted. No action is needed from you at this time.

Thank you,
Covered CA

If the Payment Request is Rejected by the Account Manager or the Program Management Team, you will receive a notification that the status changed to Rejected.

Email Subject: Navigator Grantee Payment Request – Rejected

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Hello,

Your Bi-Monthly Payment Request has been updated to a status of **Rejected**.

The request can be accessed HERE.

Thank you,
Covered CA

Once the Payment Request is Approved by the Program Management Team you will receive a final notification along with any comments that can be supplied.

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

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

PAYMENT DETAILS **APPROVAL**

Approval History (3)				
STEP NAME	DATE	STATUS	ASSIGNED TO	
Program Management Appro...	1/31/2018 11:53 AM	Approved	Program Management	▾
Account Manager Approval	1/31/2018 11:48 AM	Approved		▾
Approval Request Submitted	1/31/2018 11:32 AM	Submitted	Doogie Howser	▾
		Click to view full list		View All

Full approval history can be viewed with comments:

Payment Requests > PRQ-0097
Approval History
3 items • Sorted by Is Pending, Date • Updated a few seconds ago

	STEP NAME	DATE ↓	STATUS	ASSIGNED TO	ACTUAL APP...	COMMENTS	
1	Program Management Approval	1/31/2018 11:53 AM	Approved	Program Management		Final!	▾
2	Account Manager Approval	1/31/2018 11:48 AM	Approved			Nice!	▾
3	Approval Request Submitted	1/31/2018 11:32 AM	Submitted	Doogie Howser	Doogie Howser	Test submission	▾