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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.



Navigate to the Progress Report via the link provided in the email or from the Progress Reports list on the Entity Account page.

State Tax ID	Primary Phone Number (789) 456-3216	-	Mar 28,	2023 • 8KB • xlsx			Minuel
Primary Location Rating Region	Alternate Phone						views
✓ Navigator Details			拱 Strate	gic Workplans	(0)		
Organization Type School Districts			Progre	ess Reports (1			
Families with mixed immigration sta- tus?	Projected Counselors		Progress	Progress R	Status	Days Unti	1
Does the Entity serve the disabled?	Languages Spoken English;Spanish	_	PR-2781	4/15/2023	Draft	18	ŀ
fear entity was established?	Regions Served						View

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2. Click the **Edit** button at the top of the report page.

(H)	Q :	Search				▲ @ -
Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸	Secure Mailbox	
Navigator Entity Hollywood Me	ss Report 781 y edical Center	Progress Repor 4/15/2023	rt Due Date	Days Until Due Date 18	Submitted On Time	Edit Submit for Approval
Navigator Enti Hollywood M	ity Medical Center			Progress Report PR-2781		Approval History (0)
Account Mana	ager			Draft Owner Ed Smith		- Notes (0)

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

CHI Q Search		×	≜ 8 -
Home Entity 🗸 My Team 🛇	Edit PR-2781		
Progress Report PR-2781	Navigator Entity Progress Report Hollywood Medical Center PR-2781 Reporting Period Status Draft	~	Edit Submit for Approval
Navigator Entity Progress R Hollywood Medical Center 4/15/2023	Account Manager Owner Ed Smith		
	1. Contact Information		
Navigator Entity Hollywood Medical Center	Organization Legal Name Hollywood Medical Center		
Reporting Period	Doing Business As Name N/A		
Account Manager	Direct Phone Number		
✓ 1. Contact Information	Submitter Information (populated after submission)		Add Files
Organization Legal Name Hollywood Medical Center Doing Business As Name	Submitted By Contact Type	5 L	Jpload Files
NI/A		Or	drop files

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.

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4. Complete all required fields and then click **Save** once completed.

Q Search		× • •
Home Entity 🗸 My Team 🗸	Edit PR-2781	
Progress Report PR-2781 Navigator Entity Progress R Hollywood Medical Center 4/15/2023	Available Chosen Network of Provide Payment System fo Portal and Process 4 Premium Cost and 4 Provide detailed description 4	Edit Submit for Approval
Navigator Entity Hollywood Medical Center Reporting Period Account Manager	Other Barriers	
1. Contact Information Organization Legal Name Hollywood Medical Center Doing Business As Name NA	9. How can Covered California better support Navigator Program grantees?	Add Files ; Upload Files Or drop files
Direct Phone Number (789)456-3216 	Account Manager Feedback Reviewed By Account Manager Section 4 Account Manager Feedback	
2. Grant Information Grant Agreement Number	Section 5 Account Manager Feedback	
19-№23 ✓ 3. Regions	Section 7 Account Manager Feedback	
Regions Served Northern California (1) 	Section 8 Account Manager Feedback	
Select all applicable reporting periods	Section 9 Account Manager Feedback	
Our each and course on Activities ()	иозт-2019 Wrogress Report Upsert ID 0013R00000A7dT6QAJ:2023-04-15 00:00:00	
Optional Narrative Summary of services selected above		ancel Save

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.

	٩	Search		Progress Report "PR-2781" was saved.		\boxtimes	¥ 🖸 -
Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸	Secure Mailbox		

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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.

(LI)	٩ :	Search					≜ (3 -
Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸	Secure Mailbox		
Progres PR-27	is Report 781						Edit Submit for Approval
Navigator Entity Hollywood Me	y edical Center	Progress Repor 4/15/2023	t Due Date	Days Until Due Date 18	Submitted On Time	Completed	

 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.

Comments 	Submit for Approval Optional Comments for Reviewer	×
	Next	

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.

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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.



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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