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NAVIGATOR PRODUCTIVITY REPORT

This document outlines all features and functions available to reviewing a Productivity Report in the Certification Portal.

PRODUCTIVITY REPORT NOTIFICATION

The Primary or Authorized Contact listed on the Entity is responsible for reviewing a productivity report. An email notification will be sent to the Entity business contacts the same day the Productivity Report file is uploaded.

Email Subject: Productivity Report Available for [YOUR ENTITY NAME]

Email Body:





Hello,

Your Productivity Report is ready for review and you can access it from [HERE](#).

See all productivity reports following this [Link](#).

Thank you,
Covered CA.

Link to new report

Link to all reports

NAVIGATOR PRODUCTIVITY REPORT OVERVIEW

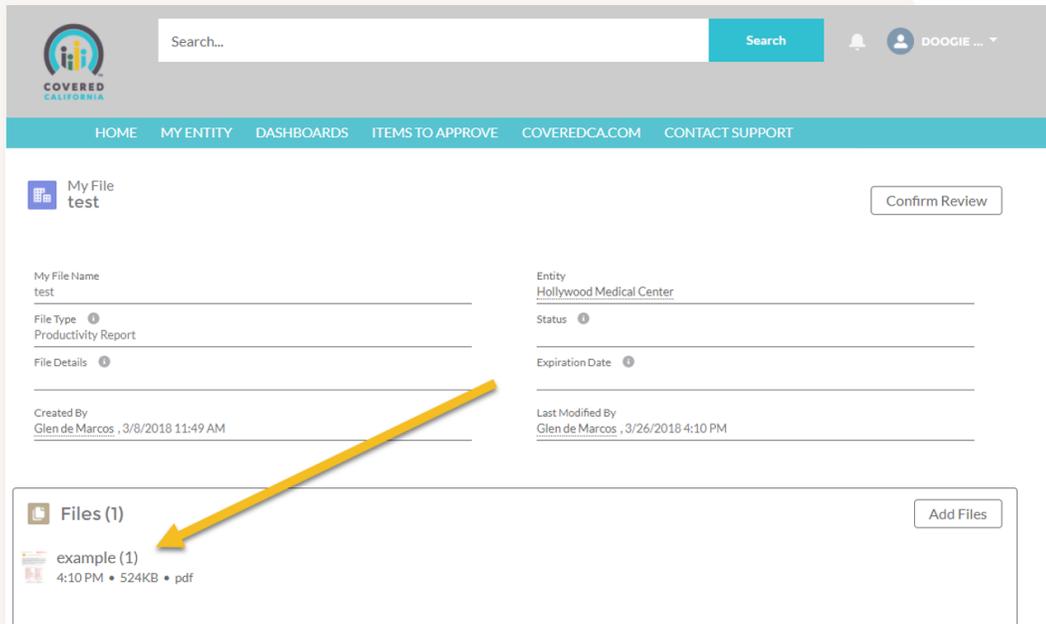
ACCESS YOUR PRODUCTIVITY REPORTS

To access the Productivity Report, click the link in the email notification to navigate to the record in the Certification Portal. You can view all your Productivity Reports from the Entity home page.

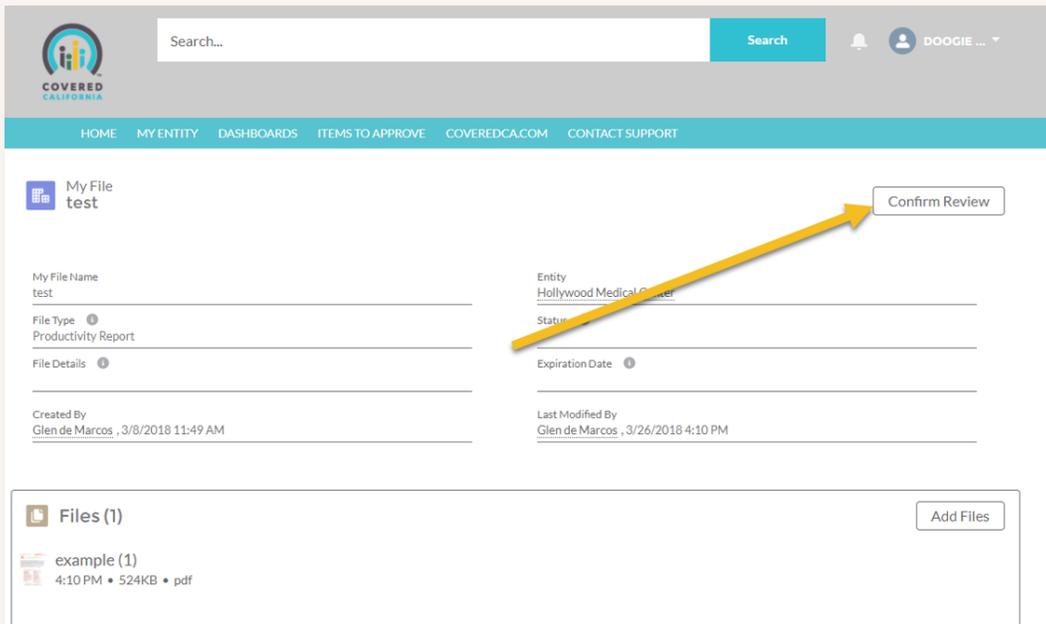
The screenshot shows the user interface for the Hollywood Medical Center account. At the top, there is a search bar and a user profile for 'DOOGIE'. Below this is a navigation menu with options: HOME, MY ENTITY, DASHBOARDS, ITEMS TO APPROVE, COVEREDCA.COM, and CONTACT SUPPORT. The main content area is titled 'Account Hollywood Medical Center' and includes buttons for '+ Follow' and 'Edit'. It lists key details: Program Type (Navigator Organization), Primary Phone Number (789) 456-3216, Website Address, and Primary Location Address (126 Test Ave, Sacramento, CA, 95837). A yellow arrow points from the 'Entity Information' section to the 'My Files (1)' section. The 'Entity Information' section contains fields for Account Name, Parent Account, Business Legal Name, Website Address, Category (Profit), Federal Tax ID (789456321), Organization Type, Families with mixed immigration status?, Does the entity serve the disabled?, Year entity was established?, Resource for Counselor affiliation?, Entity Status (Active), Program Type (Navigator Organization), Primary Email Address (u3982975@mvrht.net), Primary Phone Number (789) 456-3216, Secondary Phone Number, State Tax ID, Disabilities Served, Other Disabilities Served, Projected Counselors, and Regions Served. The 'My Files (1)' section contains a table with one entry: 'Test' (File Name), 'Productivit...' (File Type), and 'View All' (Action). Other sections include 'Required Documentation (0)', 'Annual Collateral Allocations (0)', 'Progress Reports (1)' (with one entry: PR-0080, 3/10/2018, Draft, 32 days until), and 'Payment Requests (2)'.

REVIEW THE PRODUCTIVITY REPORT

1. Click on the File Name in the Files section at the bottom of the report page to open it.

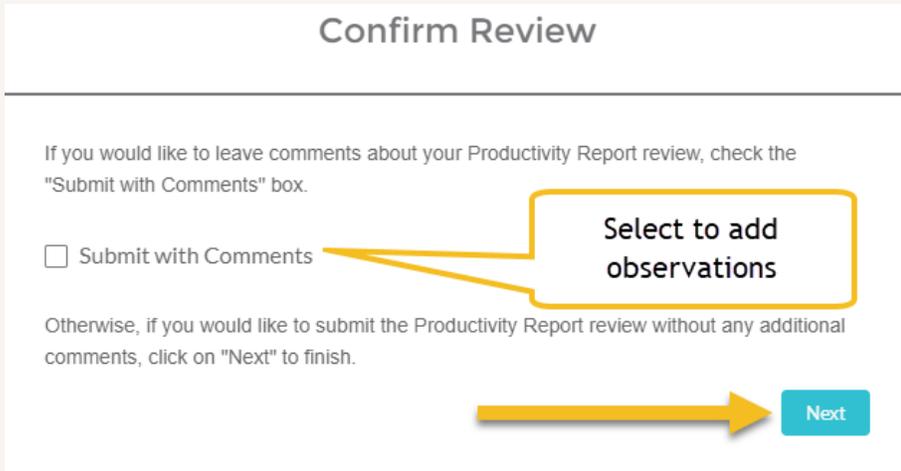


2. Once the attachment has been opened and reviewed, proceed to submit the confirmation of receipt and review by using the "Submit Review" button on the top of the report page.



NAVIGATOR PRODUCTIVITY REPORT OVERVIEW

- The following screen gives the user the option to directly submit the review acceptance or add comments and observations. By default the submission is without comments; check the box to add comments and observations on the Productivity Report. Click “Next” to finish or continue to the next screen.



If you selected “Submit with Comments” you will have an extra screen to add comments and select different options for Review Feedback. Click “Next” to finish the review confirmation and submit your feedback.



NAVIGATOR PRODUCTIVITY REPORT OVERVIEW

4. You will be contacted shortly after this to review the document with your Account Manager.

NOTIFICATION OF PROCESS COMPLETION

Once the Productivity Report review process is complete, you will receive an email with any comments from the Account Manager with regards to the completion of the review.



Hello,

Your Productivity Report is complete. To review it you can access it from [HERE](#).

Comments: This is a test comment from the Account Manager

Thank you,
Covered CA.
