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NAVIGATOR SITE VISIT OVERVIEW

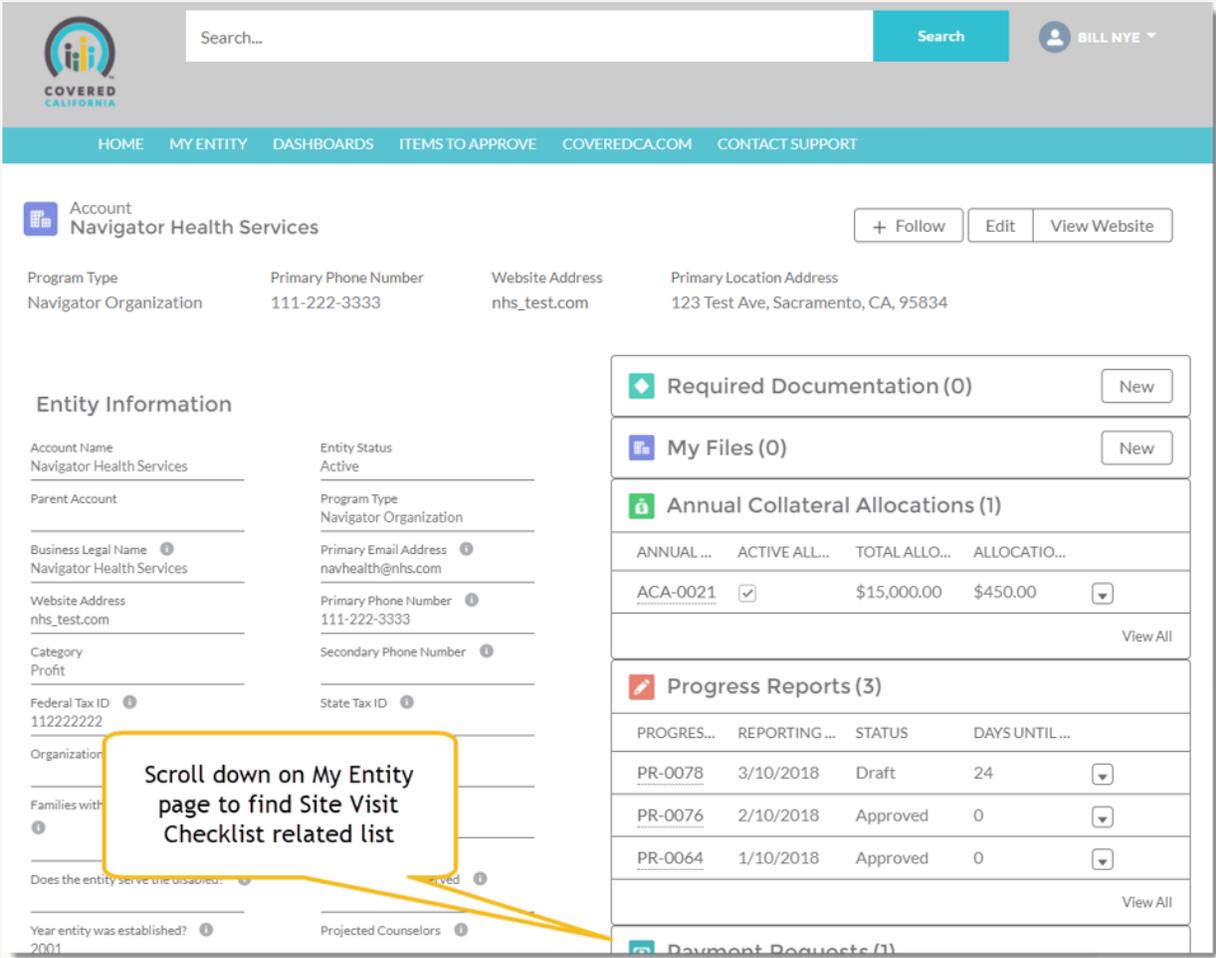
This document outlines the process of viewing Site Visit Checklists in the Certification Portal.

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 | Entity Status: Active
 Parent Account: | Program Type: Navigator Organization
 Business Legal Name: Navigator Health Services | Primary Email Address: navhealth@nhs.com
 Website Address: nhs_test.com | Primary Phone Number: 111-222-3333
 Category: Profit | Secondary Phone Number: |
 Federal Tax ID: 112222222 | State Tax ID: |
 Organization: |
 Families with: |
 Does the entity serve the disabled: |
 Year entity was established?: 2001 | Projected Counselors: |

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)

[New](#)

LOCATIO...	CONTACT FI...	CONTACT L...	PHONE NU...
NHS Main	Bill	Nye	111-222-3...

[View All](#)

Site Visit Checklists (4)

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

HOME
MY ENTITY
DASHBOARDS
ITEMS TO APPROVE
COVEREDCA.COM
CONTACT SUPPORT

Location NHS Main

[Edit](#)

Physical City	Physical State	Physical Zip Code
Sacramento	CA	95834

Estimated number of individuals served **100**

Record Type **Primary Location**

Location Details

Location Name	Entity
NHS Main	Navigator Health Services
Contact First Name	Contact Last Name
Bill	Nye
Email Address	Secondary Phone Number
bnye@nhs.com	
Phone Number	County
111-222-3333	Sacramento
Will organization accept referrals?	
No	

Hours of Operation

Site Served (0) [New](#)

Sub... (0) [New Sub Site Location](#)

Site Visit Checklists (4)

SITE V...	DATE OF...	STATUS
SV-0...	2/9/20...	Complete
SV-0...	1/25/2...	Submitt...
SV-0...	1/25/2...	Complete
SV-0...	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** ▾

[HOME](#) [MY ENTITY](#) [DASHBOARDS](#) [ITEMS TO APPROVE](#) [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

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