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NAVIGATOR SITE VISIT OVERVIEW

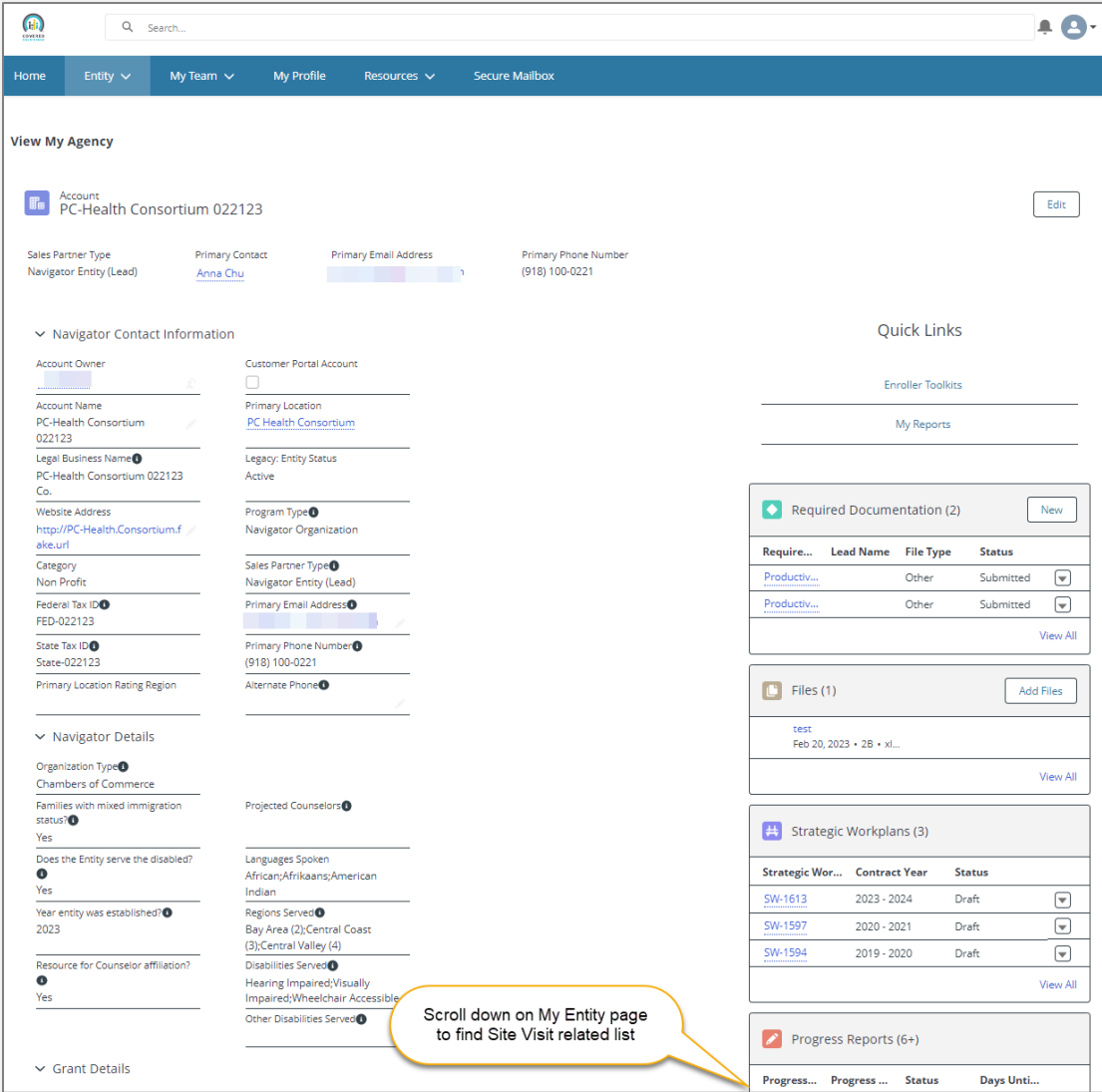
This document outlines the process of viewing Site Visit Checklists in the Enroller Portal.

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.



View My Agency

Account: PC-Health Consortium 022123 [Edit]

Sales Partner Type: Navigator Entity (Lead) | Primary Contact: Anna Chu | Primary Email Address: [Redacted] | Primary Phone Number: (918) 100-0221

Navigator Contact Information

Account Owner: [Redacted] | Customer Portal Account:

Account Name: PC-Health Consortium 022123 | Primary Location: PC Health Consortium

Legal Business Name: PC-Health Consortium 022123 Co. | Legacy, Entity Status: Active

Website Address: http://PC-Health.Consortium.fake.url | Program Type: Navigator Organization

Category: Non Profit | Sales Partner Type: Navigator Entity (Lead)

Federal Tax ID: FED-022123 | Primary Email Address: [Redacted]

State Tax ID: State-022123 | Primary Phone Number: (918) 100-0221

Primary Location Rating Region: [Redacted] | Alternate Phone: [Redacted]

Navigator Details

Organization Type: Chambers of Commerce | Projected Counselors: [Redacted]

Families with mixed immigration status: Yes | Languages Spoken: African/Afrikaans/American Indian

Does the Entity serve the disabled?: Yes | Regions Served: Bay Area (2), Central Coast (3), Central Valley (4)

Year entity was established: 2023 | Disabilities Served: Hearing Impaired; Visually Impaired; Wheelchair Accessible

Resource for Counselor affiliation?: Yes | Other Disabilities Served: [Redacted]

Grant Details

Quick Links

- Enroller Toolkits
- My Reports

Required Documentation (2) [New]

Require...	Lead Name	File Type	Status
Productiv...	Other	Submitted	[Dropdown]
Productiv...	Other	Submitted	[Dropdown]

[View All]

Files (1) [Add Files]

test
Feb 20, 2023 • 28 • xl...

[View All]

Strategic Workplans (3)

Strategic Wor...	Contract Year	Status
SW-1613	2023 - 2024	Draft [Dropdown]
SW-1597	2020 - 2021	Draft [Dropdown]
SW-1594	2019 - 2020	Draft [Dropdown]

[View All]

Progress Reports (6+)

Progress...	Progress ...	Status	Days Unti...
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Related List on My Entity page:

<p>Created By: [User], 2/21/2023 10:29 AM</p> <p>IPAS Created Date: _____</p> <p>Certification End Date: _____</p>	<p>Last Modified By: [User], 3/30/2023 10:35 AM</p> <p>Account Record Type: _____</p> <p>Active Navigator Entity: [Entity]</p> <p>Account Manager: [User]</p>	<p>PC Health... Entity Sub ...</p> <p>2100 Arden Way #190 Sacramento, CA 95825</p> <p>2100 Arden Way #190 Sacramento, CA 95825</p> <p>View All</p>																								
		<p>Site Visit Checklists (5)</p> <table border="1"> <thead> <tr> <th>Site Visit</th> <th>Date of Si...</th> <th>Location ...</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>SV-0251</td> <td>3/30/2023 ...</td> <td>PC Health ...</td> <td>Submitted ▼</td> </tr> <tr> <td>SV-0250</td> <td>3/30/2023 ...</td> <td>PC Health ...</td> <td>Submitted ▼</td> </tr> <tr> <td>SV-0220</td> <td>2/28/2023 ...</td> <td>PC Health ...</td> <td>Draft ▼</td> </tr> <tr> <td>SV-0219</td> <td>2/28/2023 ...</td> <td>PC Health ...</td> <td>Complete ▼</td> </tr> <tr> <td>SV-0218</td> <td>2/24/2023 ...</td> <td>PC Health ...</td> <td>Submitted ▼</td> </tr> </tbody> </table> <p>View All</p>	Site Visit	Date of Si...	Location ...	Status	SV-0251	3/30/2023 ...	PC Health ...	Submitted ▼	SV-0250	3/30/2023 ...	PC Health ...	Submitted ▼	SV-0220	2/28/2023 ...	PC Health ...	Draft ▼	SV-0219	2/28/2023 ...	PC Health ...	Complete ▼	SV-0218	2/24/2023 ...	PC Health ...	Submitted ▼
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SV-0218	2/24/2023 ...	PC Health ...	Submitted ▼																							

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.

Home Entity My Team My Profile Resources Secure Mailbox

Site Visit Checklist
SV-0251

DBA PC-Health Consortium 022123	Grantee PC Health Consortium	Agreement # GAN-022123	Date of Site Visit 3/30/2023 10:20 AM	Status Submitted
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<p>Site Visit: SV-0251</p> <p>Status: Submitted</p>	<p>Location of Visit: PC Health Consortium</p> <p>Date of Site Visit: 3/30/2023 10:20 AM</p>
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Site Visit Attendees

Primary Contact: Anna Chu	Presence: Present
Authorized Contact: John Chu	Presence: Present
Any Other Delegated Contacts: 0	

Checklist

Reviewed Current Work Plan with Grantee: Yes

Campaign Strategy Has Been Reviewed: Yes

Productivity Report Review With Contact: 1: Yes

Verify Subcontractors: Yes

of Subcontractors: 1

Reviewed KP Collateral Process: 1: Yes

Identified Tool Kits Available: 1: Yes

Discussed Present Year Market Conditions: 2: Yes

Events Posted on Event Portal: Yes

Review Certification Portal and Job Aid: 1: Yes

Reviewed Authorization Form Procedure: Yes

CAP in Past 12 Months? (Review Findings): Yes

Reviewed STD2024 Form and Payment Request: 2: Yes

Summary

Comments to Entity: 1

Sample Comments to Entity: _____

Created By: [User], 3/30/2023 10:20 AM

Last Modified By: [User], 3/30/2023 10:21 AM