



Navigator Grant Reporting Guide Fiscal Year 2015 July 1, 2014 – June 30, 2015

For the grant year starting July 1, 2014, Navigator grantees will submit monthly data via web forms using Survey Monkey. This will allow consistency in reporting, thereby facilitating more timely aggregation and analysis of Navigator data and performance.

In order to allow the type of data structure required within the limitations of the available reporting system, there are two web forms that will be required each month that, together, encompass the data elements outlined in the Navigator grant agreement. Detailed information and instructions for both of these tools follow in this document.

Navigator Outreach Reporting Tool Pages 2 - 4
<https://www.surveymonkey.com/s/NavigatorOutreachReporting>

Navigator Monthly Reporting Tool Pages 5 - 7
<https://www.surveymonkey.com/s/NavigatorReportingTool>

Please contact Kelly Dougherty at Kelly.dougherty@state.vt.us with any questions.

Navigator Outreach Reporting Tool

This tool is used only for public outreach/education activities, not for individual appointments/consultations. This can be completed any time, either in “real time” as Navigators conduct outreach activities, or all at once at month’s end. Per the 15th of the month reporting deadline, data will be downloaded from the instrument around the 16th of each month for the previous month’s activities.

Go to: <https://www.surveymonkey.com/s/NavigatorOutreachReporting>



Navigator Outreach Reporting Tool

This tool is only for recording broad outreach/education activities designed to reach an audience. Do not record consultations, applications or enrollments here.

To enter consultations, applications completed, enrollments and qualitative monthly reporting information, go to: <https://www.surveymonkey.com/s/NavigatorReportingTool>

Navigator Grantee Organization Name

Name of person completing report

Navigator Outreach Reporting Tool

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Navigator Grantee Organization Name

- Association of Africans Living in Vermont
- State Primary Care Association
- Brattleboro Memorial Hospital
- Capstone Community Action
- Champlain Valley Office of Economic Opportunity
- Community Health Centers of Burlington
- Community Health Centers of Rutland Region, Inc.
- Community Health Centers of Lamoille Valley
- Fletcher Allen Health Care
- Lake Champlain Lifelong Learning Fund (Chamber of Commerce)
- Northeast Kingdom Chamber of Commerce
- North Country Hospital and Health Center
- Northeastern Vermont Regional Hospital
- Planned Parenthood of Northern New England
- Porter Medical Center
- Richford Health Center, Inc. d/b/a Northern Tier Center for Health
- Rutland Region Chamber of Commerce
- Rutland Regional Medical Center
- Vermont Business for Social Responsibility
- Vermont Campaign for Health Care Security
- Vermont Coalition of Clinics for the Uninsured
- Vermont Family Network

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Use drop down box to select Navigator Organization name



Navigator Outreach Reporting Tool

Outreach/Education Activities

This section is for recording details about broad outreach/education activities designed to reach an audience. Do not record individual consultations or appointments here.

Date of Activity

MM DD YYYY
- / /

Organization conducting activity
(either the Grantee Organization, a specific site/location of the Grantee Organization, or a designated Partner Organization)

Activity Description

Additional comments about/description of activity (optional)

County of Activity

Drop down boxes for allowed responses

Audience for the Activity

- General Public
- Membership/followers (e.g., for email newsletter, social media)
- Current VHC or Medicaid enrollees
- Potential VHC enrollees
- Those of low income or those who serve vulnerable Vermonters with low income
- Young Invincibles (e.g., for event/venue targeted at young adults)
- Other professionals/organizations serving VHC target audience
- Other (please specify)

Estimated number of individuals reached through this activity

The estimated number of people reached was:

Drop down box for allowed responses

Number of follow up appointments scheduled as a result of this activity

What materials were distributed at this activity (check all that apply)

- Brochure
- Contact Card
- Pen
- Water Bottle
- Tote Bag
- Other (please specify)



Navigator Outreach Reporting Tool

Do you have additional Outreach activities to enter at this time?

- Yes
 No

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If user answers “yes” to above, they will be directed to the page below, alerting them to return to the form via the link to enter additional Outreach activities. This allows each activity to be captured as an individual data record, thereby facilitating data aggregation and analysis.



Navigator Outreach Reporting Tool

To enter another outreach activity, return to the Outreach Reporting Tool link at:

<https://www.surveymonkey.com/s/NavigatorOutreachReporting>

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If user does not have additional outreach activities to enter, they will be directed to a “thank you”/exit page.

Navigator Monthly Reporting Tool

This tool is used to track aggregate monthly Navigator activity with respect to individual application/enrollment assistance and qualitative reporting by Navigator organizations. Per the 15th of the month reporting deadline, data will be downloaded from the instrument around the 16th of each month for the previous month's activities.

Go to: <https://www.surveymonkey.com/s/NavigatorReportingTool>



Navigator Monthly Reporting Tool

NOTE: This tool is for reporting:

- Total number of individual consultations during the reporting month
- Total number of applications submitted during the reporting month
- Total enrollments for the reporting month
- (Optional) Total number of follow-up encounters for the reporting month
- Qualitative information for the reporting month

To enter information about Navigator outreach/education activities, go to: <https://www.surveymonkey.com/s/NavigatorOutreachReporting>

Navigator Grantee Organization Name

Name of person completing this report

Reporting Month

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Navigator Grantee Organization Name

- Association of Africans Living in Vermont
- Bi-State Primary Care Association
- Brattleboro Memorial Hospital
- Capstone Community Action
- Champlain Valley Office of Economic Opportunity
- Community Health Centers of Burlington
- Community Health Centers of Rutland Region, Inc.
- Community Health Centers of Lamoille Valley
- Fletcher Allen Health Care
- Lake Champlain Lifelong Learning Fund (Chamber of Commerce)
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- Vermont Coalition of Clinics for the Uninsured
- Vermont Family Network

Reporting Month

- July 2014
- August 2014
- September 2014
- October 2014
- November 2014
- December 2014
- January 2015
- February 2015
- March 2015
- April 2015
- May 2015
- June 2015

Use drop down boxes to select Navigator Organization name and reporting month

Navigator Monthly Reporting Tool

Individual Education/Consultation

A consultation/education "session" is defined as a single encounter, at least 10 minutes in length, regardless of the number of individuals/family members included in it; e.g., a consultation/education session with a couple or family regarding their options for enrollment would be counted as ONE session); all sessions should be counted even if the individual returns and is counted elsewhere as completing an application at a later date.

Number of sessions conducted this reporting month for individual consultation/education only (i.e., does not end in completed application)

Applications

"Application" is defined as single portal or paper application, regardless of number of individuals included on it; e.g., an application with five family members on it is counted as ONE application;

"Submitted by Navigators" is defined as submitted through the Navigator's portal account or through the customer's portal account with Navigator assistance, or on paper with Navigator assistance.

"Navigator assistance" is defined as the Navigator providing assistance with the actual completion and submission of the application. Simply providing someone with a paper application or directing them to the electronic application does not count as "Navigator assistance".

Number of applications submitted by Navigators this reporting month

Enrollments

"Individuals enrolled" is defined as the actual number of individual people who were enrolled in a plan (QHP or Medicaid) by the Navigator (e.g., if 3 family members were enrolled in a plan, even from within a single VHC application, this would be counted as 3).

"Enrolled in plan" is defined as having the plan selection confirmed in the portal

Number of enrollments (plan selections made) assisted/completed by Navigators

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Follow-Up Encounters (Optional)

"Follow up encounter" is defined as a consultation, at least 10 minutes in length, that is related to an application already in process. The consultation/follow up can be with the applicant or with VHC.

A follow-up encounter regarding a single application is counted as one encounter, regardless of the number of individuals/family members included on the application; e.g., a follow up encounter with a couple or family regarding their application would be counted as ONE session.

Number of Follow-Up Encounters

Approximate number of hours spent on follow up encounters by Navigators in this reporting month:

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User navigates to next page to enter qualitative information.



Navigator Monthly Reporting Tool

Qualitative Reporting

**Describe your organization's progress toward outreach goals during this reporting period.
What were your most successful outreach/education activities during this reporting period?
What were your least successful outreach/education activities during this reporting period?**

Describe your organization's progress toward enrollment goals during this reporting period.

Describe any barriers you have encountered in outreach or enrollment goals during this reporting period.

**Describe your contact/collaboration with other Navigator organizations this past month.
What were the most successful activities?
Least successful?**

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Done

User clicks "done" to submit.