SLRP Certified Eligible Site (CES) Application Instructions

(Revised 10/1/2014)

CES Application Forms

The site will complete three (3) forms within the application in order to participate in SLRP.

1. **SLRP Certified Eligible Site Application**
2. **Sponsoring Entity Information**
3. **Practice Site Assurances**

Note: A site will need to *reapply every three-years* in order to continue participation in SLRP.

New User (Welcome to CalREACH)

To become an approved SLRP Certified Eligible site, do the following:

- To access the CalREACH portal click the below link:
  https://calreach.oshpd.ca.gov/Login2.aspx?APPTHEME=CAOSHPD.

- This link is also located on the SLRP website: http://oshpd.ca.gov/HWDD/SLRP.html.

- This page also includes a list of OSHPD programs. Clicking on the **blue** links will take to you to the program websites where you can learn more about the site requirements.

- To register for the first time, click **"New User".** This takes you to the **Registration** page.

Registration

- Enter all required fields marked with a red asterisk*.
- Select the SLRP **Certified Eligible Site Application** in the drop down box.
- Complete, click **"SAVE".**
- You will receive the **Green Light** confirmation that your registration was complete. You will now be able to login into the system by using your **Username** and **Password**.
- Click the **System Login** to access the login page.

Login & View Available Opportunities

- Enter your **Username** and **Password** to log into the system.
- This takes you **"View Available Opportunities"** which is the **Home Page.**
- Click on "**View Available Opportunities**" to access and complete the application forms.

(To find detailed instructions or additional information on how to use the **Home Page Features**, go the **brown** and **blue** ribbons at the top of the page and click on the **SHOW HELP** button. A **Page Help** informational screen will appear identifying these features such as how to navigate through the system, adding or editing members to your application, how to change your profile information, how to log out of the system and how to complete a task.)

Meaning for other Tabs

Navigation Tabs
Select a tab to search for documents within that category. Based on your security role, this screen will also display documents you have active in the system by default.

My Organization(s)
Select this link to view the organization or organizations you are currently a member of. Based on your security role, you may have permissions to edit organization information.

My Profile
Select this link to access your account information in the system. On the My Profile page, you can change your password and home page image. You may also edit information such as your email address or phone number.

Logout
Selecting this link will end your current session and log you out of the system.

Available Opportunities
Select the View Opportunities button to view the opportunities that are available to your organization. The Available Opportunities page will contain instructions on how to apply.

My Inbox
The My Inbox area will display all your unread emails in the system. To read an email, select the email subject or the email icon at the far left of each email item. The email may contain hyperlinks to attachments or documents within the system. Simply select the hyper link to view the attachment or navigate to the document.

You can filter and sort through your unread messages by selecting an option from the drop-down then selecting the Go button. Select the View All My Messages link to view and search all your read messages within the system.

My Tasks
This area will contain links to documents that are currently active for you in the system based on your security role. Generally when a document is active for you, you need to complete a task, or series of tasks in the document. Roll your mouse over the info icon to view a task description for the document. To navigate to the document, select the link under the Name column.

My Opportunities
- On the **"My Opportunities"** page you will find a brief description about the CES application. Click the **"Apply Now"** button.
- The **CalREACH Application User Guide** can be accessed from the **My Training Materials** link.

Agreement
- The **"Agreement"** page provides a description of the terms and conditions that the site representative is agreeing to.
- Click the **"I Agree"** button, if you accept the terms and conditions outlined.
- This takes you to the **"Application-SLRP Certified Eligible Site Menu".**

View, Edit and Complete Forms
- On the **"Application-SLRP Certified Eligible Site Menu"**,
- Click the **blue** **"View Forms"** button under the **"View, Edit and Complete Forms".**
- This allows you to access the main Forms of your electronic application and contains all the forms that will need to be completed before submitting your application.
- Each form page contains helpful content that is relevant to that particular form.
- To edit application forms, simply click **"Views Forms"** and then click on the name of the form you wish to edit.

Meaning for other Tabs

Document Information
This area contains information relevant to the current document such as the document name, your role, the current document status and the date (if applicable) that the document is due. You may also roll your mouse over the info icon to get a description of the task that currently needs to be performed on the document before it can be moved to the next possible status.

View, Edit and Complete Forms
Clicking on the **blue** **"View Forms"** button will allow you to access the main Forms of your electronic application. This section contains all the forms that will need to be completed before submitting your application. Each form page will also contain help content that is relevant to that particular form. To edit application forms, simply click "Views Forms" and then click on the name of the form you with to edit.

Change the Status
Often when tasks have been completed within a document by a user, it is that users responsibility to move or push the document to another status so a new user can perform tasks. This area will contain a list and a description of each next possible status for the user to choose from.

Management Tools
The system contains powerful tools that allow both administrative and external end users the ability to manage documents. The tool set featured on this page will vary by user. Please refer to the help on each page for more detailed instructions.

Examine Related Items
There will often be times in the system where different documents will share information. Other related information can be system messages and reports related to this document. All related information can be found on this page.

CES Application Forms

- Please note that at the top of the "Application-SLRP Certified Eligible Site Menu - Forms" page is the **Documentation Information.**

- The system will assign your application an Identification Number for your application. Please write down the **Document Information** (i.e., SLRP-2014-ACMC Highland Hospital -00220) so you can access this application at a later date or if you need to log out of the system you will be able to locate your application.

- As noted earlier, there are three (3) application forms required in the CES application. The entire application form list may or may not appear all at once but will start with the **SLRP Certified Eligible Site Application**.

- Each **Form** (which you click to access) is <u>required</u> application information. If any of the forms are not completed the application will be deemed incomplete.

- To go to the **"SLRP Certified Eligible Site Application"** form, click on the link.

SLRP Certified Eligible Site Application
- Here on the **"SLRP Certified Eligible Site (CES) Application"** form, notice that the **Practice Site Information** has been auto-populated. **Check** the practice site information box if correct.

- If the practice site information is not correct, click **My Organizations** link at the top of the page in the **brown** ribbon, enter the correct information, click "**SAVE**" and return to this page to complete the rest of the application.

- If the **Contact Information** is incorrect, click **"My Profile"** link at the top of the page in the **brown** ribbon, enter the correct information, click "**SAVE**" and return to this page to complete the rest of the application.

- Scan and upload a **Federal Tax Exempt Letter** by clicking on the **"BROWSE"** button.

- Scan and upload a mandatory **Sliding Fee Schedule** by clicking on the **"BROWSE"** button. When finished, click **"SAVE"**.

Sponsoring Entity Information

- The "**Sponsoring Entity Information**" identifies the site that will be financially responsible for signing the MOU, matching the SLRP award amount and for paying the provider. This is typically located at the administrative or executive offices.
- **Check** the box if the practice site applying for certification is also the Sponsoring Entity.
- If the practice site is not the Sponsoring Entity and you have a Sponsoring Entity, go to the drop down box and select your site from the list.
- If the Sponsoring Entity is not on the list, you will need to enter the information, manually.
- When finished, click **"SAVE".**

Practice Site Assurances

- Read the **"Practice Site Assurances"** form carefully as these are the terms and conditions that the site is agreeing and complying with in order to participate in SLRP.
- Click all required fields marked with the **red asterisk*.**
- When finished, click "SAVE**".**

Final Step

- There is one final step that you will need to complete prior to logging out of the system. If you feel that all the application pages have been complete and are ready to submit, go to the end of this page and click **"Status Change"** (noted in blue).
- This will take you back to the **"Application – SLRP Certified Eligible Site Menu – Status Options"** page.
- It is important to note that once you submit your application, it will enter into a read-only status and cannot be changed, edited or revised.

Accessing a Saved Application

- To return to your incomplete CES application, log into the system with your Username and Password.
- On the **"View Available Opportunities"** page, click **"My Tasks".**
- Scroll down the table and locate your application in the table (Document Type, Organization, Name, Current Status, and Year). Click on your **Organization's Name** and **Identification Number.**

- This will take you back to the **Application – SLRP Certified Eligible Site Menu**. Click, on the **View Forms** button in the "View, Edit and Complete Forms".

Checking Application Status
- To check the status or to confirm that your application has been approved, click **"My Applications"** in the **blue** ribbon at the top of the page and filter through the **Application Types, Application Name** and **Search**.
- Locate the application you submitted by its **Name** and **ID Number** and check **Current Status** which will indicate application is in process or is approved.
- The system will send a confirmation receipt via email to you as well as from the SLRP team.
- A completed and approved application includes all three completed FORMS including the Federal Exempt Tax letter and Sliding Fee Schedule.

Printing an Application
- At any time you may print out a copy of your full application. From the Application-Loans-Basic Menu page, click the blue **"VIEW MANAGEMENT TOOLS"** button.
- You can click to **Create Full Print Version** or you can also click to **Create a Full Blank Print Version.** A blank version of the application may be helpful to work from outside the system.

What's Next?
- The site application is open year round.
- If you are a **new site** and have provider(s) that would like to participate at your site in this year's application cycle, starting on September 15, 2014 to November 15, 2014, submit the CES application before the November 15, 2014 deadline date.
- SLRP staff will review the CES application and will approve or deny the application.
- SLRP staff will notify you that you have been approved. You may also receive a notice through the CalREACH system via email.
- If **approved**, the site will be placed on the CES list.
- **Reapply** every three-years.
- The site will need to sign **a Memorandum of Understanding (MOU)** with OSHPD, if the provider at your site receives an award.

Resource Links
➢ Please contact the **AGATE Help Desk** for any *system questions* including your **Username** and **Password**:

- **AGATE Help Desk Availability**
  (Contact AGATE for all system question/issues and inability to access your Username or Password. Contact the SLRP Team for all program questions.)
  Hours: Monday thru Friday 8am to 8pm EST
  Phone: 1-800-820-1890
  Email: helpdesk@agatesoftware.com.

➢ **Contact the SLRP Team** for all *SLRP program questions*:
- Submit all SLRP program questions/issues through the SLRP email address:
  SLRP@oshpd.ca.gov
  CalREACH website:
  https://calreach.oshpd.ca.gov/Login2.aspx?APPTHEME=CAOSHPD.