Account and Contact Management Best Practices in Salesforce

December 2024

What will be covered in this training?

Part 1: Understanding Accounts and Contacts

Part 2: Managing Accounts and Contacts

This training will help you answer the following questions:

- What are Accounts?
- What are Contacts?
- How do Accounts and Contacts interact?
- When do I introduce new Accounts or Contacts, and how do we enforce uniqueness?
- How do I change accounts and contacts?
- Are there Data Standardization rules we should be aware of?
- How do we handle shared Accounts, Contacts, and Resources?
- How do I get support to resolve discrepancies?

Part 1: Understanding Accounts and Contacts in Salesforce

Salesforce Accounts

Three pieces form the picture of an account

Account Types
Captures information about the type of healthcare provider, organization, or health plan.

Select 1 of these

Account Sub Types
Defines the Account type more granularly. The choices are different depending on the Account Type selected

Select 1 of these

Designations
Captures information about the type of actions, accreditations, service, location, and/or program associated with an account type

Select 1 or more of these

Examples:
- Facility
- Community Organization
- Government Organization
- Association
- Health Plan
- Health System – links other account types

Examples:
- Facility: Hospital, Dialysis Center, etc.
- Community: Faith Based Org, Aging Resources Center, etc.
- Government: Federal, State, Department of Corrections, etc.
- Association: Patient, Professional
- Health System: No Sub Types

Examples:
- Acute Care
- Drug Treatment Center
- Rural Emergency Hospital
- Federally Qualified Health Center

Accounts

Enforcing Uniqueness in Accounts

Required Fields to add/save an Account Record:

- Account Complete Formal Name
- Account Type
- Account Sub Type (if applicable)
- CCN or NPI or TIN
- Account Billing Address or Account Physical Location Address (physical preferred)
- Active Box is checked or Inactive Date is completed
- Department Check Box indicating which department is using the Account

Fields that should be added as soon as the information is known, but not required to save record:

- Parent Account if applicable (this should be created as an Account first)
- All Business-Specific Fields
- Account Phone Number

Accounts Types and Sub-Types

Enforcing Uniqueness in Accounts

Review the Account and Contact Definitions on the Salesforce Portal

Account Type	Associated Account Sub-Types	
Community Organization	• Faith Based Organization • School or Educational Institution • Social Service Group • Community Center (Federally Qualified Health Centers)	• Aging Resource Center • Disability Resource Center • Adult Day Care • Transportation Service
Facility	• Hospital • Dialysis Center • Kidney Transplant Center • Home Health Agency • Hospice Center • Laboratory • Nursing Home	• Pharmacy • Clinic • Physicians Office • Mental Health Center • VA Medical Center • VA Dialysis Center • VA Transplant Center
Government Organization	• Department of Health • Department of Corrections • Emergency Management • Veterans Administration	• Policy Agencies • Federal Agencies • State Agencies
Professional Association	• Care Partner Advocacy • Patient Advocacy • Professional Advocacy • Research Institute	
Health Plan	There are no sub-types for this type of Account	
Health System	There are no sub-types for this type of Account (Health System is used to group multiple accounts in a parent child relationship. Health Systems should be added first and then accounts entered and associated with the Health System as a Parent.)	

Adding Designations to an Account

Accounts can have Multiple Designations

Review and Understand the Designation Definitions on the Salesforce Portal

IPRO

Designations are important to use in identifying and grouping accounts when creating list views, deliverable reports and sending communications

- More than one Designations can be added to an Account
- Designations are shared between departments and are visible to all users
- Business areas may have different Designations for the same shared Account
- Never delete a designation that you did not add without consent from the other business lines.

Types of Designations

- Accountable Care Organizations
- Acute Care
- Ambulatory Surgical Centers
- COBRA Facility
- Critical Access
- Designated AIDS Center
- Diagnostic and Treatment Center Extension Clinic
- Drug Treatment Center
- Emergency Department
- Emergency Department Approved for Pediatric Critical Care Center
- Emergency Department Approved for Pediatrics
- Extension Clinic
- Federally Qualified health Center (FQHC)
- General Medical and Surgical Hospitals
- Home Care Program
- Hospital Unit of an Institution
- Indian Health Services Hospital
- Inpatient
- Inpatient Prospective Payment System (IPPS)
- Licensed Agency
- Long-Term Acute Care Hospital
- Magnet Recognition Program
- Medicare Certified
- Non-Designated AIDS Center
- Outpatient
- PACE Program
- Palliative Care
- Pediatric
- Perinatal Unit
- Primary Care Practice
- Private MD
- Psychiatric
- Rehabilitation
- Rural
- Rural Emergency Hospital
- Special Needs Plan
- Specialty
- Stroke - Acute Ready
- Stroke - Comprehensive Center
- Stroke - Primary Center
- Substance Use
- Surgical Center or Ambulatory Care Surgery Center
- Urban
- Urgent Care Center

Salesforce Accounts

Parent Accounts – Linking Accounts together

Health System Account Types provides the ability to link many account types and sub-types to a centralized entity. This is done through a Parent / Child relationship.

Health System Account Type

Example Use Case:

Fresenius Kidney Care

Create your Health System Account Type First

Then associate other Account Types to the Health System

Fresenius Dialysis Center North Georgia

Account Type: Facility
Account Subtype: Dialysis Center
Designation: Accountable Care Organization

Fresenius Dialysis Center South Georgia

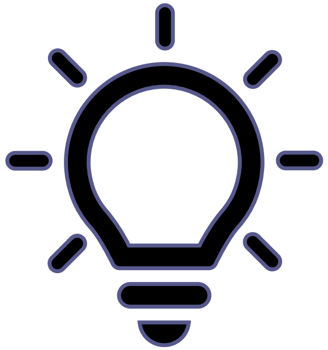
Account Type: Facility
Account Subtype: Dialysis Center
Designation: Accountable Care Organization, Home Dialysis, Nocturnal Shifts,

Fresenius Vascular Access Clinic Atlanta

Account Type: Facility
Account Subtype: Clinic
Designation: Ambulatory Surgical Center

Tips to Managing Account Data

Managing Data is critical to accuracy in report deliverables and generating communication lists



1. Implement Quality Assurance checks when loading data or adding new accounts. A view of any accounts created in the last 30 days may be helpful for SMEs and Super Users to use to identify improvement opportunities.

2. Business areas may have designations not used by other business areas for the same account. Do not remove designations from an account before talking with the Data Pro for that business area.

3. If you need to have an Account Type, Account Subtype or Designation added or removed from the picklist, submit a ticket to Salesforce Support. This will be evaluated by Data Governance and if the change is approved, it will be updated in Salesforce and user documentation updated to reflect the change.

Risk Alert: Not understanding and not properly adding designations will create inaccuracy in creating list views, reporting, and creating communication lists

Example: I want to generate all Facility Account Type of a hospital that is designated as a Long Term Acute Care Hospital and is Medicare Certified

Salesforce Contacts

Connecting Contacts to Accounts

Tip:

- There can be many contacts associated with an Account, and a single contact can be associated with multiple Accounts.
- Contacts can be associated with Health Systems to capture roles that work organizationally to in support of facility operations.

Account Types
Captures information about the type of healthcare provider, organization, or health plan.

Select 1 of these

Examples:

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Account Sub Types
Define the Account type more granularly. The choices are different depending on the Account Type selected

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Examples:

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Examples:

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Contacts
Individuals associated with an Account.

1 or many contacts assigned

Examples:

- UNC Healthcare - Sally Smith
- Montefiore - Tom Jones
- White Plaines – Tom Jones
- Talladega Ins - Ricky Bobby

Standard IPRO Contact Screen Layout

- All Contact Records contain the same fields.
- Understand using the tables below how each field is populated.

Field Name	Field Capability		
Account Name	**Editable** (Change the associated Account not Account name)	**Required**	**History Tracking**
Name	**Editable**	**Required**	
Title	**Editable**		
Email	**Editable**	**Required**	**History Tracking**
Phone	**Editable**		
Phone Extension	**Editable**		
Mobile	**Editable**		
Fax	**Editable**		
Active	**Editable**		**History Tracking**
Inactive Date	**Editable**		**History Tracking**
Contact Mailing Address	**Editable**		
Degrees	**Editable**		
Description	**Editable**		

Field Name	Fields Populated by Other Sources
Account Mailing Address	**Account Record**
Primary Facility CUID	**Account Record**
Primary Facility AUID	**Account Record**
SHCA Roles	**Department Specific Roles Types**
IDR Roles	**Department Specific Roles Types**
ESRD Roles	**Department Specific Roles Types**
Task 3 Roles	**Department Specific Roles Types**
13th SOW Roles	**Department Specific Roles Types**
Created By	**System Generated**
Last Modified By	**System Generated**
Contact Owner	**System Generated**
External ID	**System Generated**
Salesforce ID	**System Generated**

Adding Contact Roles

Contacts can have Multiple Roles

Roles are important for use in identifying and grouping contacts to identify the person's responsibilities, deliverable needs, and sending communications

- Contacts can be connected to multiple accounts and can serve a different role or function for each account or IPRO department they work with.
- Each IPRO Department can assign their own Contact Role or Roles to each Contact, selecting from a Data Governance approved list

Types of Contact Roles

- Administrator
- AHQT Point of Contact
- Care Manager
- Clinician
- Compliance
- Corporate
- COSTO
- Data Contact
- Emergency Department
- Emergency Management
- File Uploader
- HIT Professional
- Hospitalist
- IDR Initiating Party
- IDR Non-Initiating Party
- Infection Prevention
- IPG Liaison
- IPRA
- Medical Director
- Medical Office Staff
- NHSN Contact
- Nurse or Nurse Practitioner
- Nurse Director
- Patient Engagement
- Pharmacist
- Physician
- PFAC Member
- QINQIO Contact
- Quality
- Senior Leader
- Social Worker
- SHCA Liaison
- State/Federal Contact
- Utilization Manager

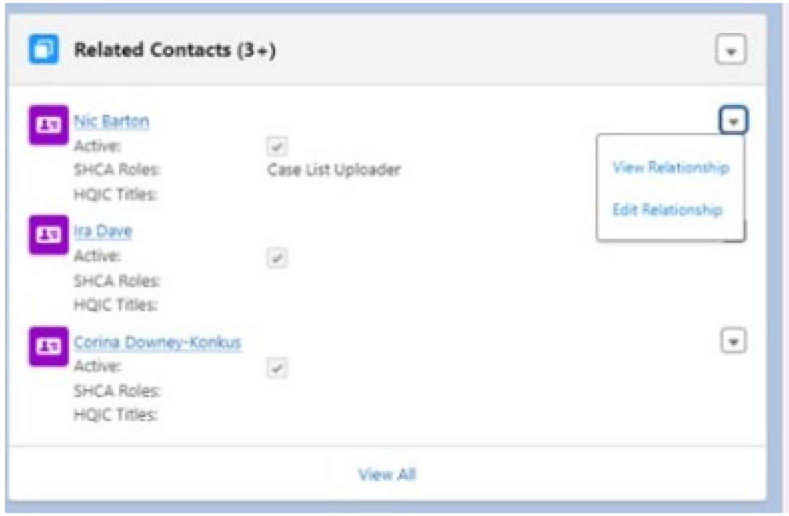
Review and Understand the Contact Role Definitions on the Salesforce Portal

Adding Contact Roles

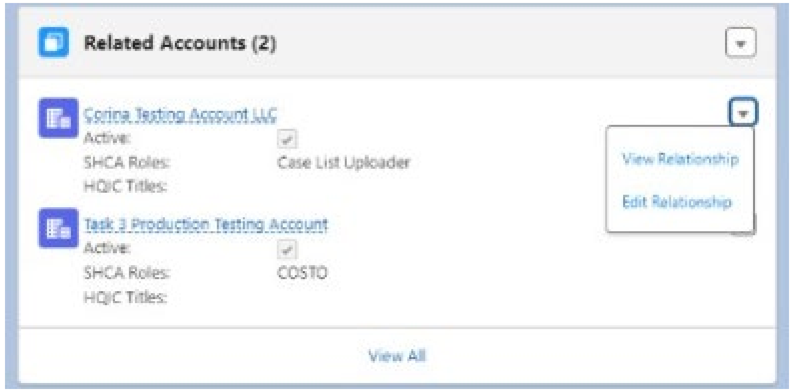
Creating Contact Roles for my Department

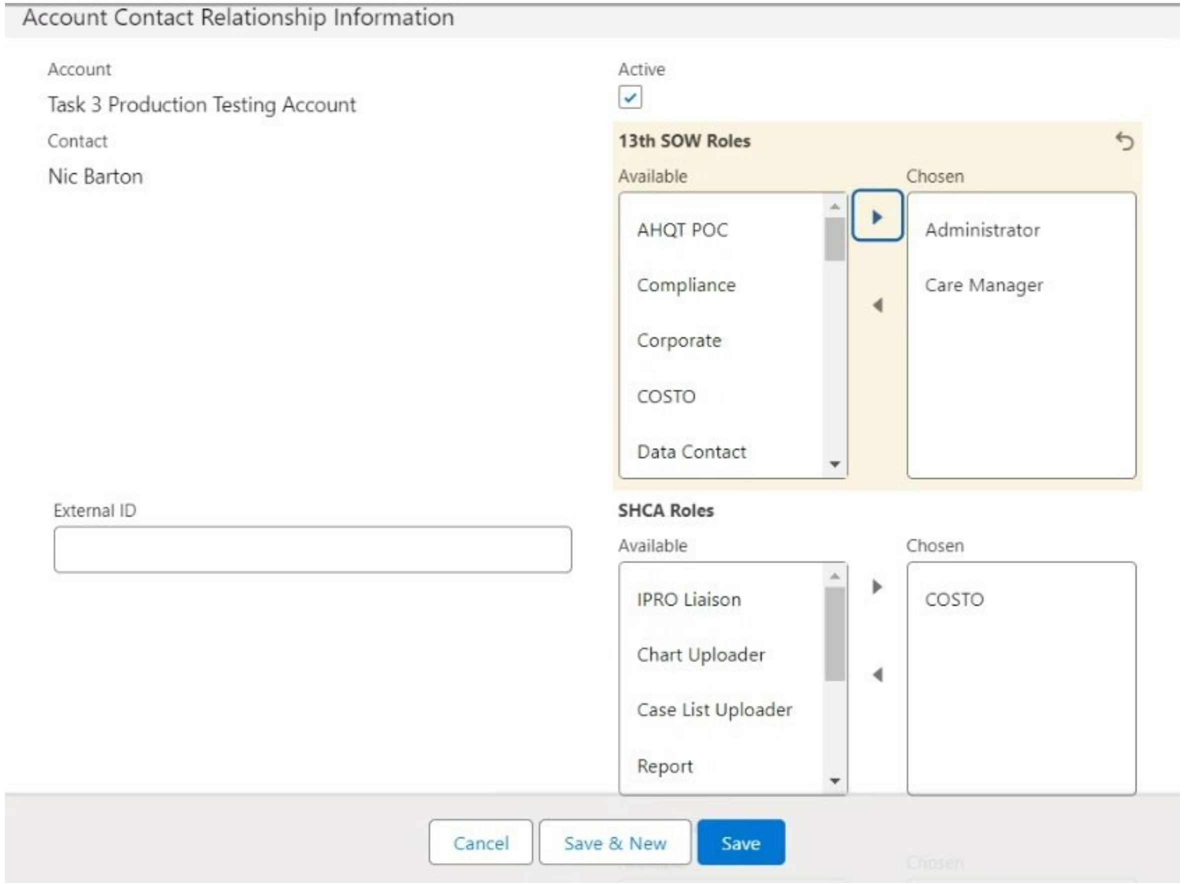
Both ways will link you to the Account Contact Relationship Information Screen. Here select the roles that should be associated with the contact from your business area

Add Contact Role from an Account Record



or Add Contact Role from Contact Record





Risk Alert: **Not understanding and not properly adding Contact Role will create inaccuracy in creating list views, reporting, and creating communication lists**

Contacts

Enforcing Uniqueness in Contacts

Required Fie save a Contact:

- Contact Formal Name
- Account Name (contacts must be linked to an account)
- One method of contact: Phone Or Mobile Number Or Email Address (Email is always preferred)
- ActIve Box or a Deactivation Date
- Contact Role

Fields that should be added as soon as the information is known, but not required to save record:

- Mailing Address
- Title
- Email or Phone (if not already populated in the primary creation)
- Additional Account Relationships

Risk Alert: All contacts should be assigned contact roles. Contact roles are critical to support segmentation for communication distribution

Tips to Managing Contact Data

Managing Contact Data is critical to ensuring the right communications get to the right people

1. Implement Quality Assurance checks when loading data or adding new contacts. A view of any contacts created in the last 30 days may be helpful for SMEs and Super Users to use to identify improvement opportunities.

2. Business areas may have roles not used by other business areas for the same contact. Do not remove roles from a contact before talking with the Data Pro for that business area.

3. If you need to have a Contact Role added to or removed from the pick list, submit a ticket to Salesforce Support. This will be evaluated by Data Governance and if the change is approved, it will be updated in Salesforce and user documentation updated to reflect the change.

Risk Alert: Not understanding and not properly adding roles will create inaccuracy in creating list views, reporting, and creating communication lists

Example: I want to send a communication to all Nurses and Nurse Practitioners working with QIN QIO 13th SOW. To achieve this the contact must have the QIN QIO 13th SOW Role of Nurse or Nurse Practitoner assigned.

Account and Contact Field Entry Standardization

How do we handle fields that have variation?

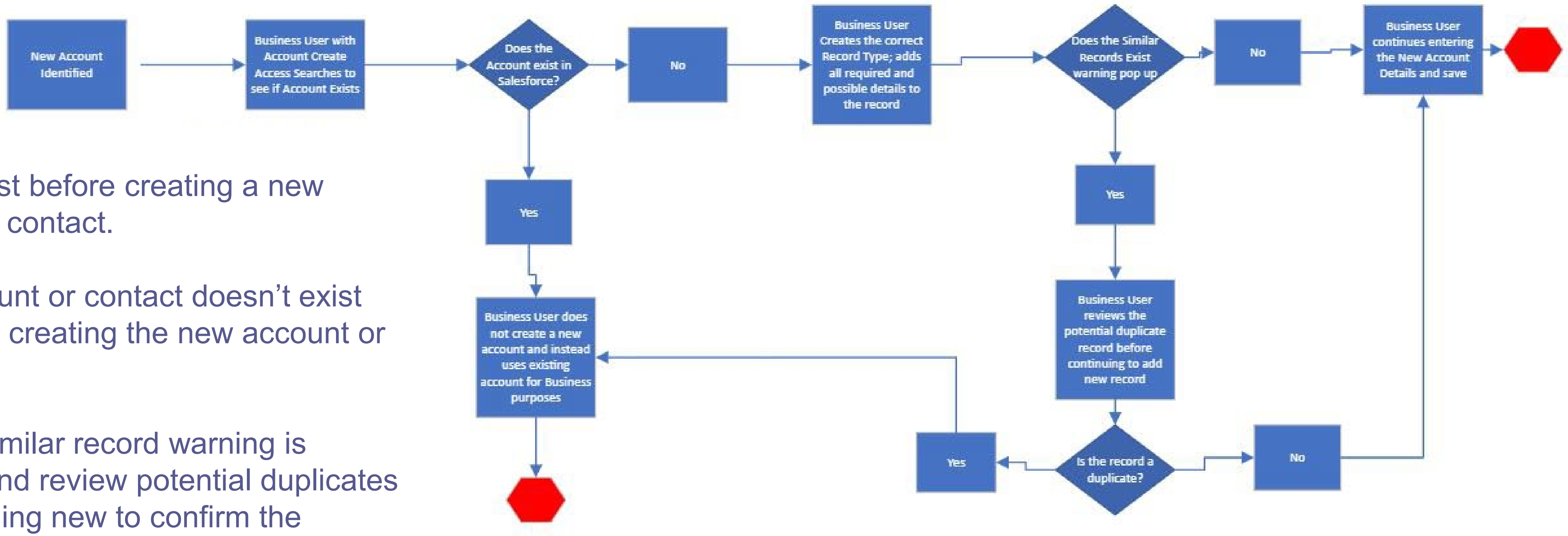
Tips for Standardizing Data:

- **Name:** Whether it be an Account Name or a Contact Name the full legal name should be used.
- **Address:** Addresses should follow USPS guidelines for formatting and abbreviations.
    - Salesforce does employ a search that looks up the USPS format for Mailing Address and Billing Address, but there are times that the client's address is different than what is recommended by the search. Use the best judgement and follow the abbreviation standards in these cases.
- **Phone/Fax Numbers:** Enter the phone number with 10 digits only, do not use ellipses (), dash – , or periods between the numbers, and do not add extensions in the phone number field. Salesforce will automatically format the phone number once the record is saved.
- **ID Fields:** Each ID field is unique to whatever it is referencing. Follow the guidelines of the agency that created the codes in how alphanumeric IDs are entered, and always include leading zeros.
    - Example: CCNs should always be 6 digits.

Part 2:
Managing Accounts and Contacts

Flow Chart for Creating New Accounts and Contacts

Duplication Management is an important consideration in creating accounts



- Search First before creating a new account or contact.
- If the account or contact doesn't exist proceed to creating the new account or contact.
- **STOP** if Similar record warning is received and review potential duplicates before adding new to confirm the account or contact does not already exist

TIP: Always check existing records for similar Accounts and Contact before creating a new account.

Risk Alert:

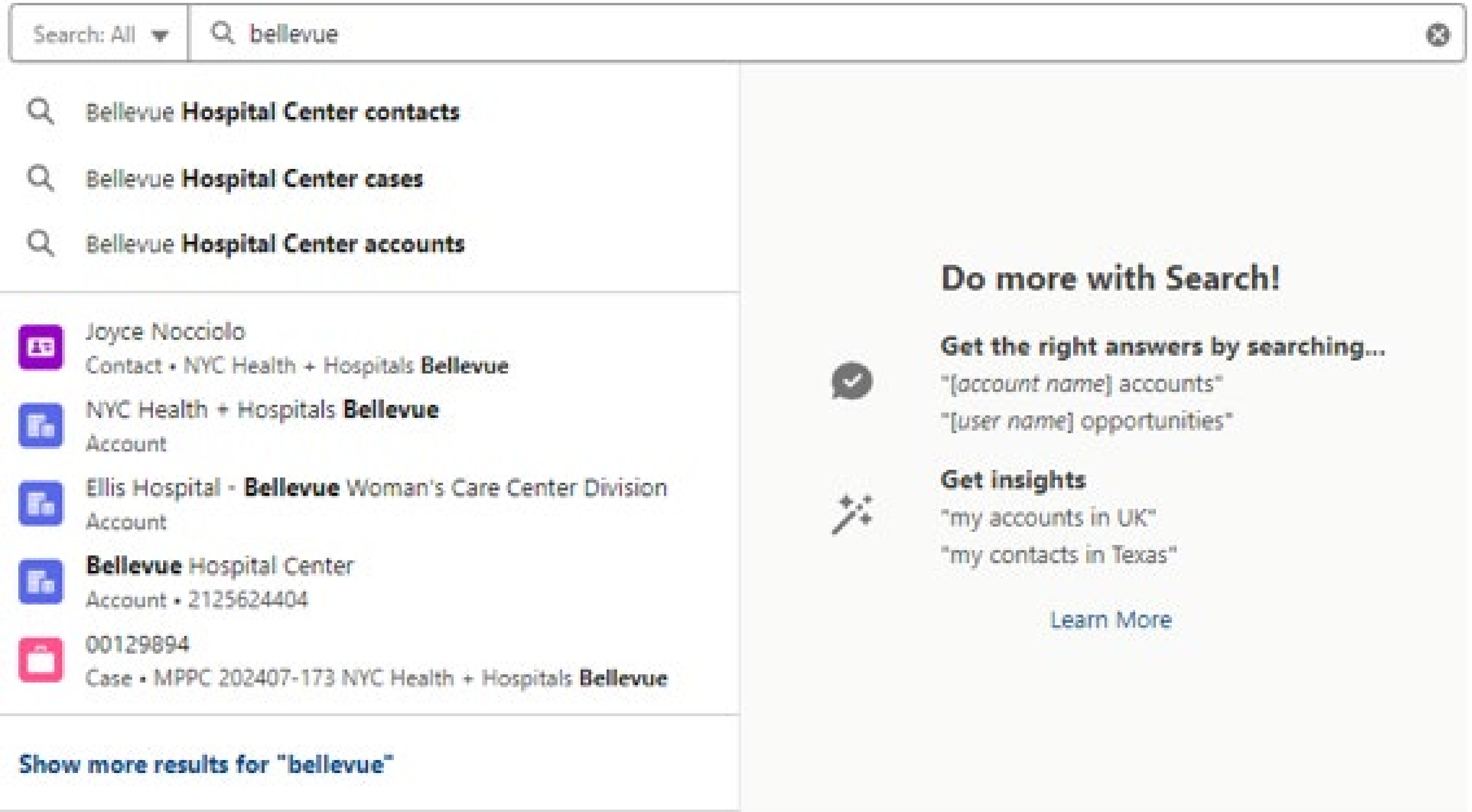
- **ONLY** Data Pros and Managers should create Facility and Health Plan Account Types
- All users can create other Community, Government, and Association Account Types

Checking for Existing Accounts or Contact

Search Tips to Avoid Duplicates

- Perform a global search for an Account or Contact name in Salesforce.

- Use partial name or only last name to bring more records but make sure to enter enough for matches to be meaningful.



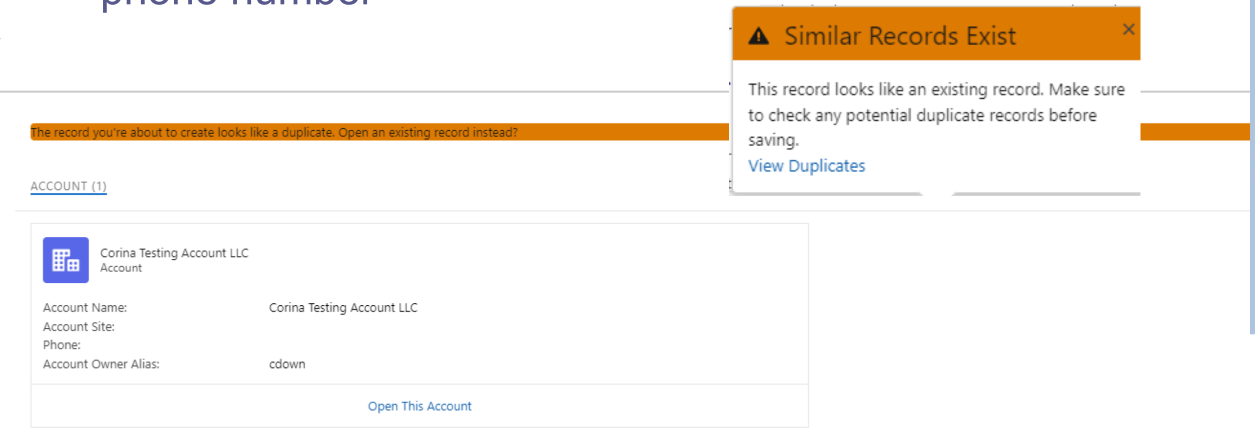
Account and Contact Similar Record Warnings

Similar Match Account Validation Rules

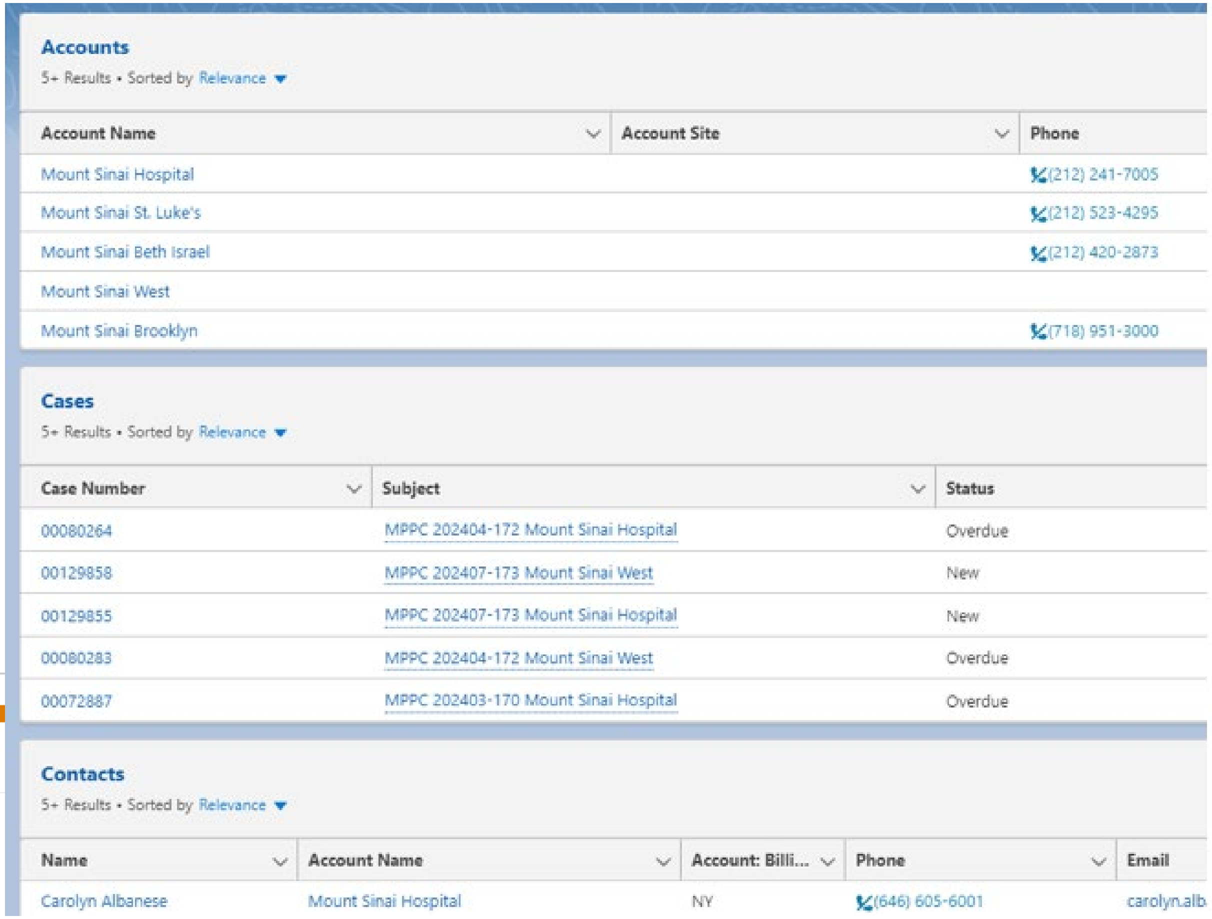
- An Account has the exact same name as another Account.
- An Account has a similar name and same Billing Address as another Account
- An Account has a similar name and same Phone as another Account
- An Account has a similar name and exact same ID CCN as another Account

Similar Match Contact Validation Rule

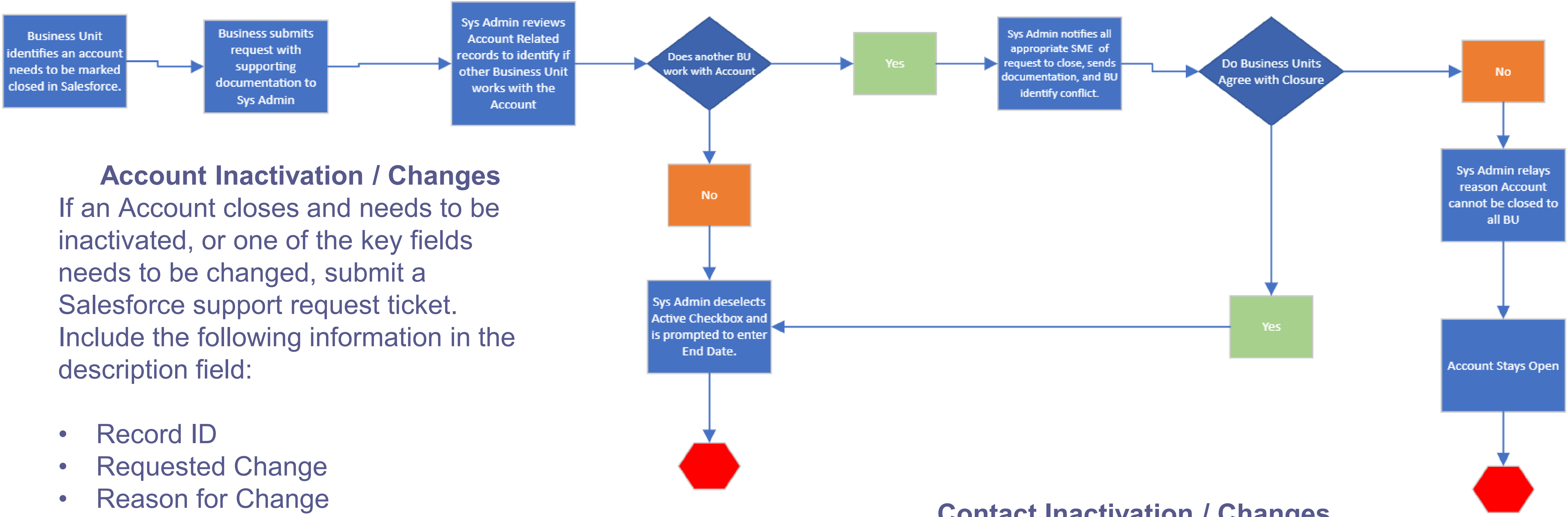
- A Contact has the exact name and email address or phone number



Carefully examine the search results to see if existing records match (Use other information to confirm a match).



Flow Chart for Inactivating or Changing Key Account and Contact Fields



Account Inactivation / Changes

If an Account closes and needs to be inactivated, or one of the key fields needs to be changed, submit a Salesforce support request ticket. Include the following information in the description field:

- Record ID
- Requested Change
- Reason for Change
- Date of Closure (This is the date the change occurred and not the date of request)
- Attach any supporting documentation such as CMS closure notifications

Contact Inactivation / Changes

If a contact needs to be inactivated simply check the inactive checkbox and add an inactive date.

If a contact key fields needs to be changed, edit the fields and save the changes.

Salesforce Data Ownership and Cleanup

Preventing and Managing Duplicates

- Rule #1: SEARCH FIRST. Before adding any new records, either via data upload or manual entry, search Salesforce to see if the record already exists.
- Rule #2: If your record is found, Update the data in the record instead of creating new.
- Rule #3: Data Stewardship, Data Cleanup, and Data Completion are all integral portions of your work

Remember:
Salesforce is a Shared Environment, it is the responsibility of each User to maintain good data.

The best way to prevent duplicates is to never introduce them in the first place

One Salesforce Many Departments

Sharing is key

There are fields on the Account and Contact that help identify which departments are using which data

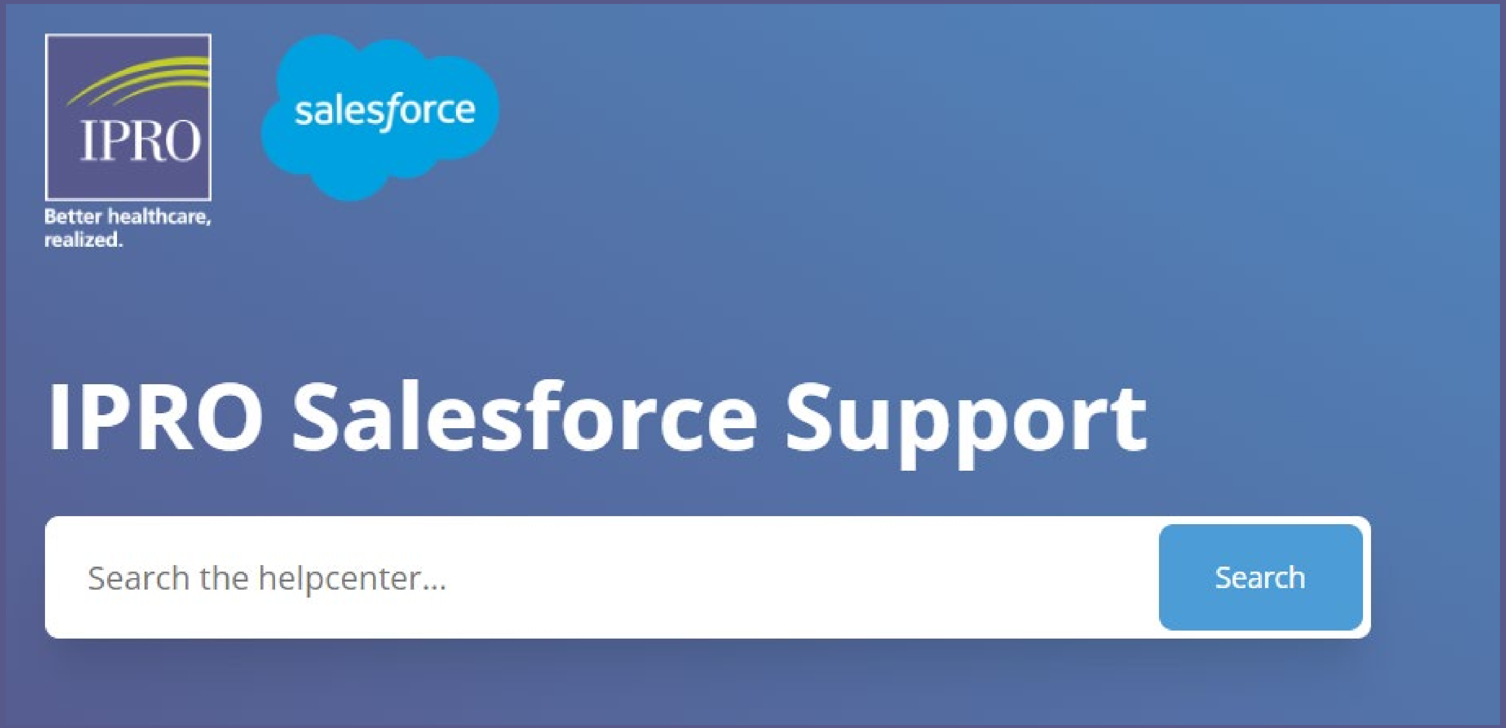
- On the Account, there are checkbox fields to identify the business area that interacts with the Account:
    - HQIC Facility
    - SHCA Facility
    - Task 3 Facility
    - 12th Scope Facility
    - 13th Scope Facility
    - 13th Scope Partner
- On the Contact, review the Contact Roles to determine if a Contact has roles assigned from another business area

Working Together to Resolve Discrepancies

- Consult representatives from other business areas before making changes to Accounts or Contacts that affect them.
- Some teams have more restrictive data requirements than others. The most restrictive requirement will be the baseline for IPRO
- If there are disputes or questions around changing Shared Data, engage Salesforce Support and/or Data Governance to help gain consensus for resolution

Risk Alert: Work together before changing data to Accounts or Contacts. When in doubt, ask! Connect with a Data Pro, Data Governance, or a Salesforce Team Member

Questions?



IPRO

Better healthcare, realized.

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http://ipro.org

https://salesforce.ipro.help/hc/en-us