



Salesforce General Navigation Training

05/30/2025

What will be covered in this training?



- **Part 1: Welcome to Salesforce**
- **Part 2: Initial Login and Navigation**
- **Part 3: Salesforce Object: Accounts, Contacts, & Cases**
- **Part 4: Leveraging List Views**
- **Part 5: Using Activities and Workplans**
- **Part 6: Reports and Dashboards**

This training will help you complete the following objectives:

- Understand what Salesforce is and how it can help you be efficient in managing your daily tasks
- Logging into Salesforce and accessing your departments Salesforce App
- Learn how Salesforce organizes data and terminology specific to the organization
- Navigating around key areas of the Salesforce system
- Understanding Account Types, Subtypes and Designations
- Establishing relationships between contacts and one or many facilities
- Using list views to get to important information quickly
- Capture emails, calls and tasks using Salesforce Activities
- Creating reports and dashboards



Part 1: Welcome to Salesforce



Salesforce: Customer Success Platform



- Designed to help you:
 - Complete activities
 - Share information
 - Analyze data
 - Connect with your facilities
- Features assist with:
 - Managing relationships with healthcare providers and contacts
 - Collaborating with others on your team
 - Collaborating and engaging partners
 - Storing your data securely in the cloud

So what does that really mean?
Before Salesforce, your contacts, emails, follow-up tasks, and prospective contracts might have been organized something like this:



Salesforce: Simplifies important data in one place



- Organizing important data in a single place to:
 - Manage all your contacts
 - Work with your customers
 - Organize tasks and to-do items
 - Focus on the right success drivers
 - Collaborate with your team
- Access data anytime, anywhere, on any device
- Management can receive real time updates to assist in decision making

After Salesforce



Data Visibility: Who Sees What?



- Protects sensitive data through permissions to ensure the right people see the right data
- Access determines your ability to open and interact with data stored in Salesforce
- The data you can create, view, edit, and delete is determined by permissions
- With the right security enabled, everyone at IPRO can use Salesforce to harness the power of collaboration

Salesforce is a Customer Relationship Management (CRM) Platform



- Allows you to manage relationships across the healthcare continuum and track data related to your interactions
- Helps teams collaborate internally and externally to gather insights across contract areas, track important metrics, and communicate via phone and email
- Supports managing and accessing data in sophisticated ways that you could never do with just one spreadsheet
- Records can be linked together to show how your data is related, so you can see the whole picture



How does Salesforce Organize Data?



Salesforce organizes your data into objects and records.

Objects

- Like a tab on a spreadsheet
- Accessed via the navigation menu

Records

- Like a single row of data
- Select any record to drill into a specific account, contact or other type of record

The screenshot illustrates the Salesforce interface. At the top, a table shows data organized by object and record:

A	B	C	D
Account Name	Close Date	Amount	Opportunity Name
Acme	1/30/2018	\$12,000,000	Global Media - 220 Widgets

Below the table, a navigation menu shows 'Accounts', 'Contacts', and 'Opportunities' objects. A red box labeled 'Object' encompasses the table headers and the navigation menu. A red box labeled 'Record' encompasses the data row for 'Acme' and the 'Opportunities' menu item. Below the navigation menu, the 'Opportunities' tab is selected, showing a detailed view of the 'Global Media - 220 Widgets' record. This record view includes a table with the same data as the top table, and a section for 'Opportunity Owner' (Madison Rigby). A red box labeled 'Record' encompasses the detailed record view. The interface also shows a navigation menu with 'Sales', 'Home', 'Opportunities', 'Leads', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', and 'More'.

Object, Record, and Other Terms to Know!



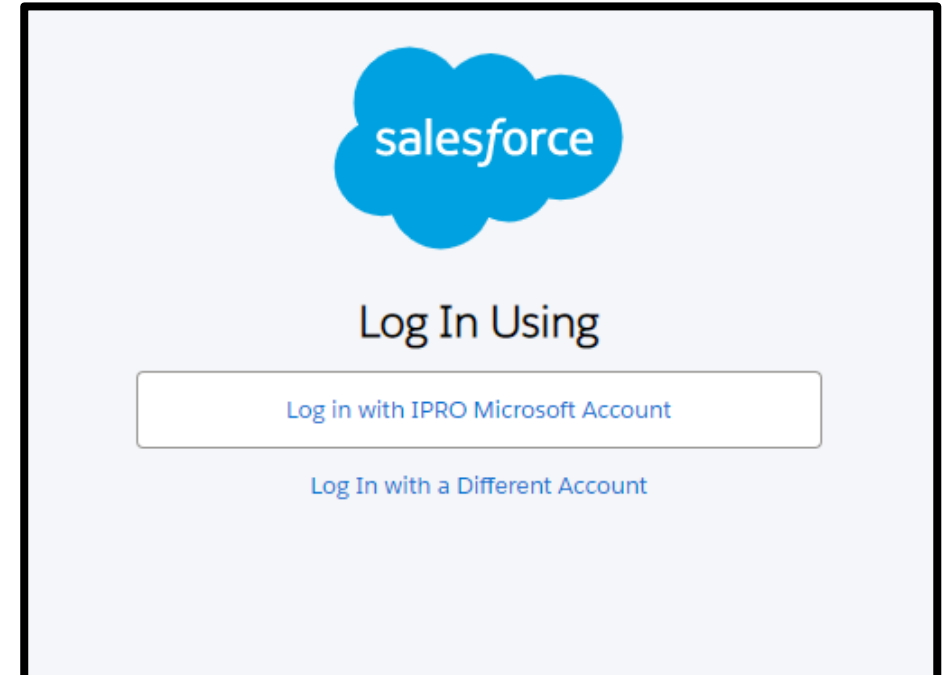
When we say	We mean this	Not this
Record	An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet	This round thing that plays music #vinyl
Field	A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet	A green meadow with flowers and grass and hopping bunnies
Object	A table in the database; in that spreadsheet example, an object is a tab on the spreadsheet	Something unidentified in the sky, with green creatures inside
Org	Short for “organization,” the place where all your data, configuration, and customization lives. You log in to access it. You might also hear this called “your instance of Salesforce”	Short for organ, meaning your heart, liver, kidneys, or possibly a big musical instrument
App	A set of fields, objects, permissions, and functionality to support a business process	A thing you download onto your phone

Part 2: Getting Started: Initial Login and Navigation

Logging into Salesforce



- To log into the IPRO Salesforce environment, open a Chrome browser and go to: <https://ipro3.my.salesforce.com/>
- Select “Log In with IPRO Microsoft Account” for IPRO direct staff, or choose “Log in with a Different Account” for IPRO contract staff
- You will be taken to the login page where you will need to enter your IPRO email address and password. Depending on if you are in an office or not, you might be asked to authenticate via DUO
- Once your account has been verified, you will be re-directed to the IPRO Salesforce instance



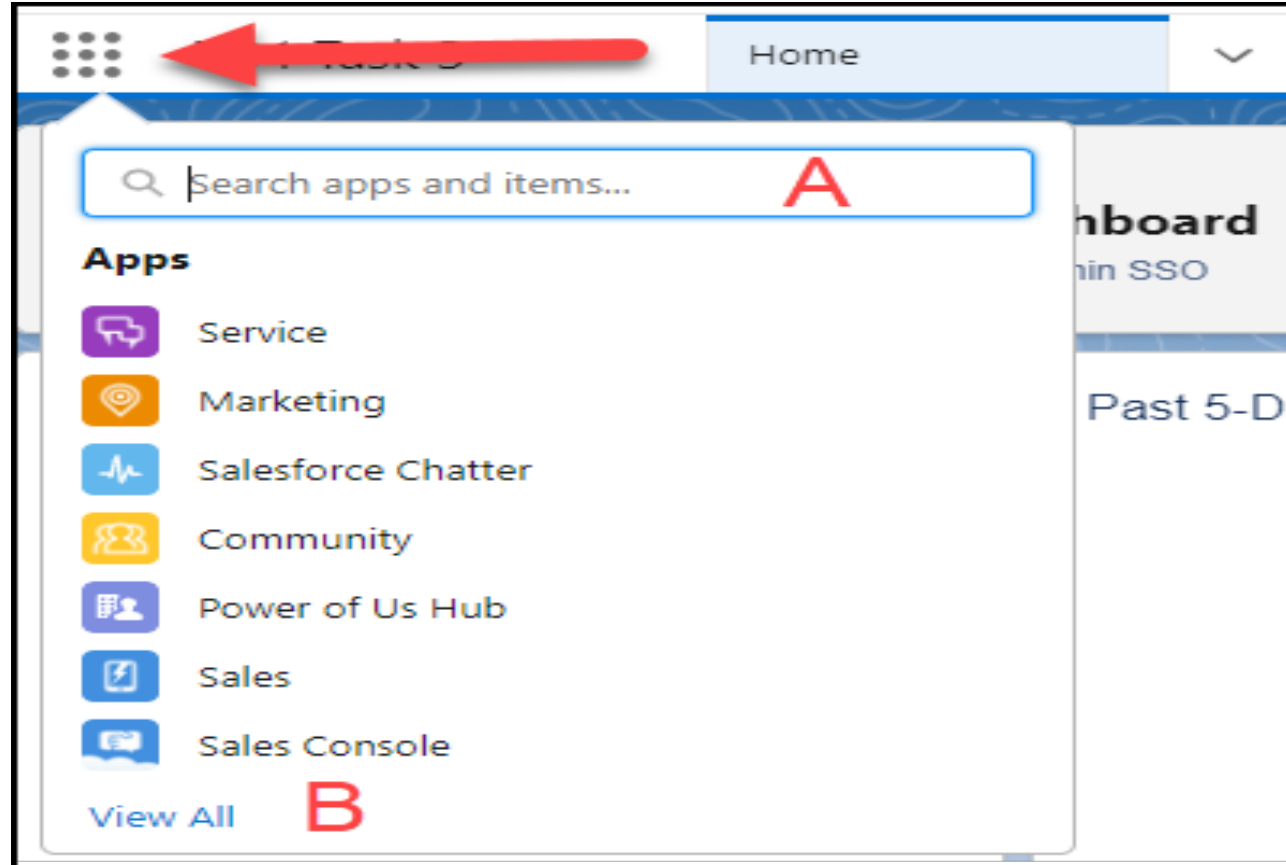
Accessing Departmental Custom App



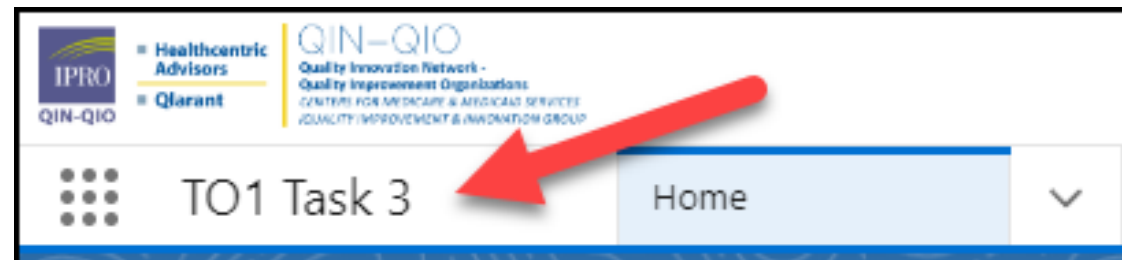
Each department has been provided with their own App which will contain all the objects that are needed to support the contract.

Click the “waffle icon” or App Launcher icon:

- A. Use the “Search apps and items” box to find the app for your department
- B. Click “View All” to see a full list of all available applications and objects



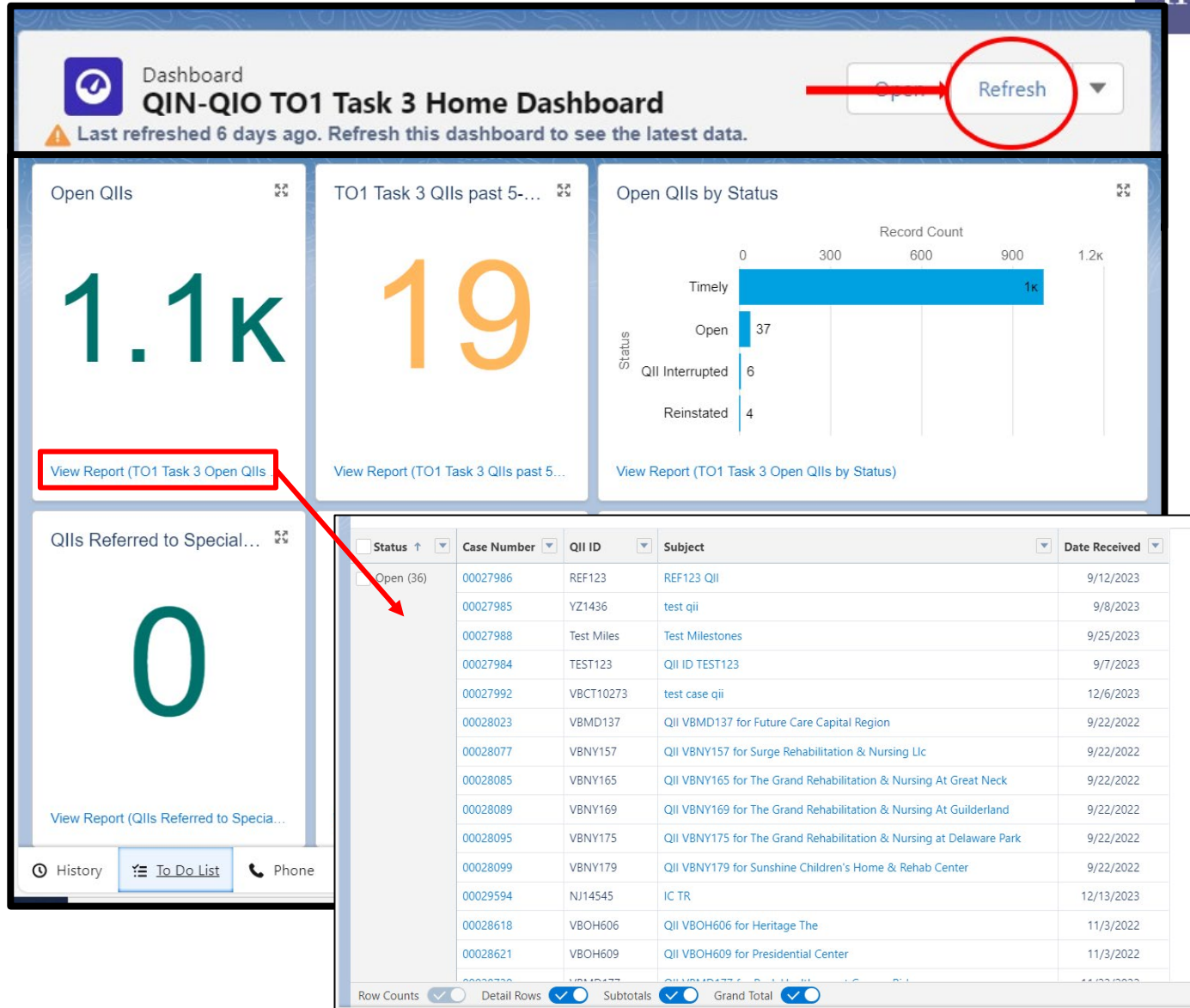
The application selected will display beside the app launcher icon.



Home Page – Dashboard Overview

The home landing page is a dashboard, created to assist you with finding important information quickly.

- Home Dashboards are created from a variety of reports for each specific app
- The reports underlying each section can be accessed by clicking the blue “View Report...” link.
- Using the refresh button on the top right will provide real time updated information



Dashboard
QIN-QIO TO1 Task 3 Home Dashboard
Last refreshed 6 days ago. Refresh this dashboard to see the latest data.

Open QILs: 1.1K
TO1 Task 3 QILs past 5-...: 19
Open QILs by Status: Timely (1k), Open (37), QII Interrupted (6), Reinstated (4)
QILs Referred to Special...: 0

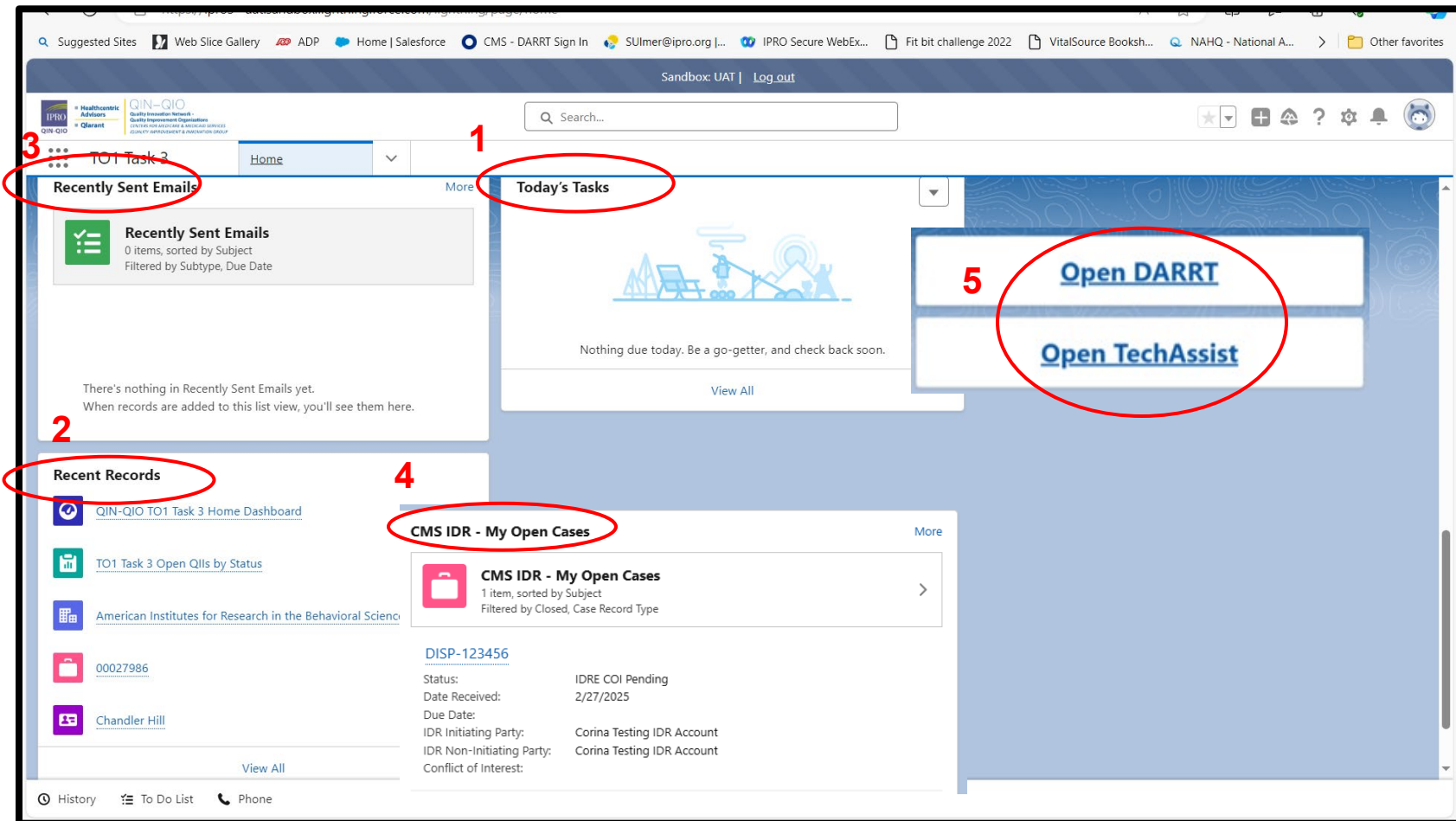
Status	Case Number	QII ID	Subject	Date Received
Open (36)	00027986	REF123	REF123 QII	9/12/2023
	00027985	YZ1436	test qii	9/8/2023
	00027988	Test Miles	Test Milestones	9/25/2023
	00027984	TEST123	QII ID TEST123	9/7/2023
	00027992	VBCT10273	test case qii	12/6/2023
	00028023	VBMD137	QII VBMD137 for Future Care Capital Region	9/22/2022
	00028077	VBNY157	QII VBNY157 for Surge Rehabilitation & Nursing Lic	9/22/2022
	00028085	VBNY165	QII VBNY165 for The Grand Rehabilitation & Nursing At Great Neck	9/22/2022
	00028089	VBNY169	QII VBNY169 for The Grand Rehabilitation & Nursing At Guilderland	9/22/2022
	00028095	VBNY175	QII VBNY175 for The Grand Rehabilitation & Nursing at Delaware Park	9/22/2022
	00028099	VBNY179	QII VBNY179 for Sunshine Children's Home & Rehab Center	9/22/2022
	00029594	NJ14545	IC TR	12/13/2023
	00028618	VBOH606	QII VBOH606 for Heritage The	11/3/2022
	00028621	VBOH609	QII VBOH609 for Presidential Center	11/3/2022

Home Page – Dashboard Overview



Each Department Home Page is customized for their unique needs. Some helpful information you may find includes:

1. Tasks: By using the dropdown arrow next to “today’s tasks” you can switch the view from Today’s Tasks, My Tasks (future tasks), and Overdue Tasks
2. Recent Records: Quick links to a list of your most recently accessed records
3. Recently Sent Emails
4. My Open Cases
5. Important departmental quick links



The Example above is from QIN – your Dashboard will be customized for your department needs.

Navigation Menu



Navigation Menu

- Home
- Accounts
- Contacts
- Cases
- Case Tags
- Provider Action Plans
- Referrals
- Low Boosters

Objects specific for a business app

- Home
- Accounts
- Contacts
- Cases
- Reports
- Dashboards

All Apps have these objects

The Navigation Menu is your go to option to switch between Salesforce objects

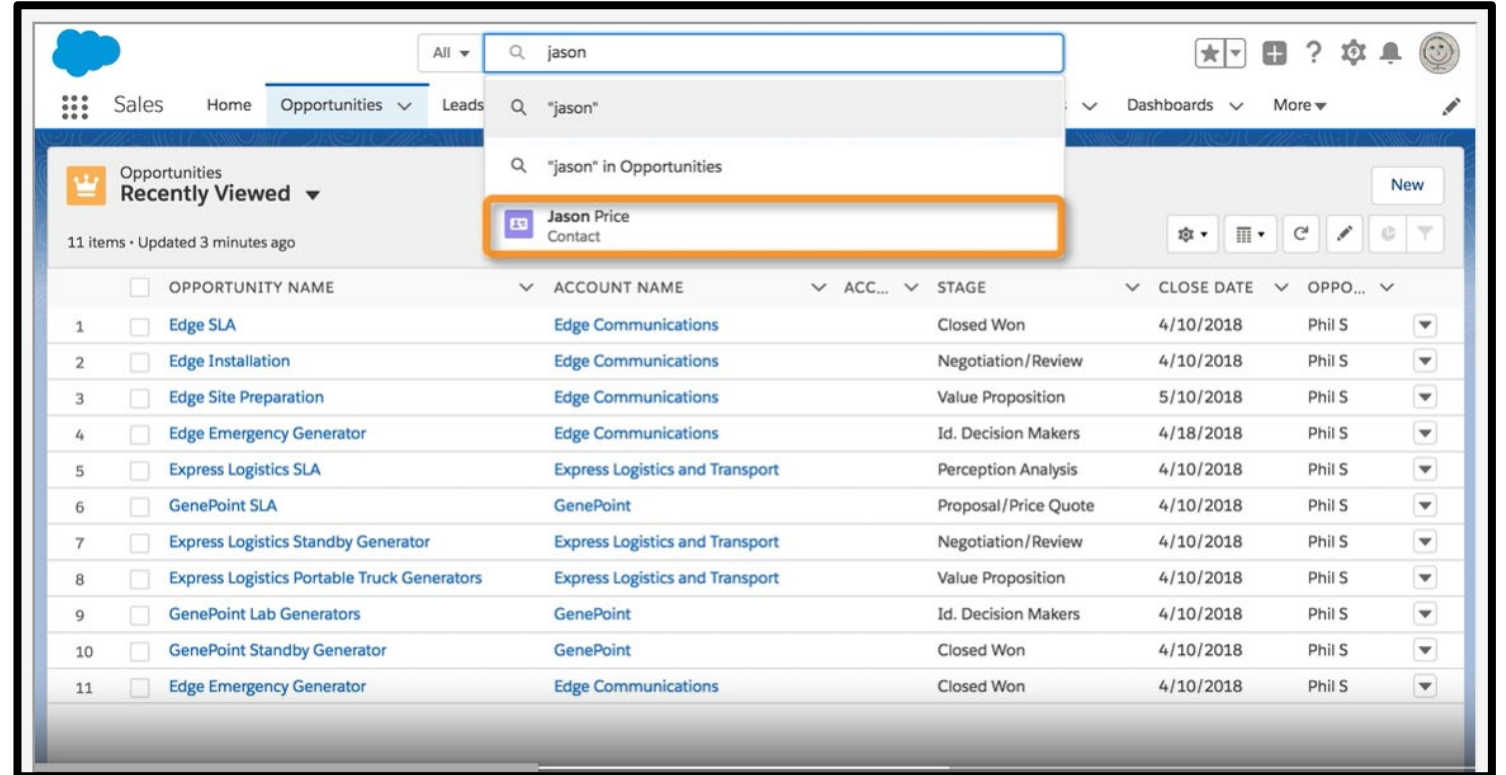
- Click the arrow to display and access the Salesforce objects available for your business app
- IPRO uses a Shared Data model, that means that there are a select set of objects that all departments will use

Searching for Records



At the top of every page is a Global Search option. A Global Search will look through all records containing your search term and bring up all available options.

- Click into the search box which will show you the 5 areas used most frequently
- As you type, suggestions appear in the dropdown list, first by looking at the objects you use most frequently and then looking at the object you are on
- Only 3 characters are needed to start a search, and suggestions appear for what is being searched.
- Clicking on the items searched for will link you directly to that record.



IPRO uses a shared data model for Account and Contact information.

It is a **Best Practice** to **Search First** before creating new records.

Quick Access Tool Bar



Department Apps may have a bottom tool bar on every Salesforce Page. This tool bar contains some helpful quick access to tools and information.



- **History** – a listing of recently accessed records
- **To Do List** – activities assigned to you
- **Phone** – the dial pad for RingCentral

Using the “To Do List”



A screenshot of a mobile application's 'To Do List' screen. The interface is divided into several sections. At the top left, a hamburger menu icon is circled in red, with the text 'To Do List' next to it. Below this is a search bar with a magnifying glass icon, a refresh icon, a sort icon, and a filter icon, all of which are circled in red. The main content area shows a list of tasks under the 'All' category. Each task entry includes a star icon, a title (e.g., 'Call'), a description (e.g., 'Complete task for Test Contact related to 00027984 by Dec 29'), and a completion status icon. On the left side, there is a sidebar with filters: 'All', 'Starred', 'Due Today', and 'Overdue'. Below these filters, there is a section for labels with the text 'Use labels to categorize your tasks. For example, Urgent or Pipeline.' and a '+ New Label' button, which is circled in red. At the bottom of the screen, there is a navigation bar with three items: 'History', 'To Do List' (which is circled in red), and 'Phone'.

- To Do List allows you to filter items based on how you would like to view your information.
- You can view different categories such as All, Due Today, and Overdue items and even create new labels to categorize tasks.
- There are several icons to the right of the screen that enables you to search the To Do List, refresh the page, sort, and further filter the information.

Part 3: Salesforce Objects: Accounts, Contacts and Cases

Accounts, Contacts, and ACR Objects

Salesforce Object Relationships



- The backbone of all Salesforce data is the Account and Contact objects
- The Account Object represents the "place or building" that is a facility or organization for IPRO contracts
- The Contact Object contains the information of the individual representatives of the Account organization
- IPRO utilizes a Shared Data Model, meaning that departments will share the same Account and Contact records to avoid duplication



Accounts

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

Examples:

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

Account Sub Types

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

Select 1 of these

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 Plan: No Sub Types

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:

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

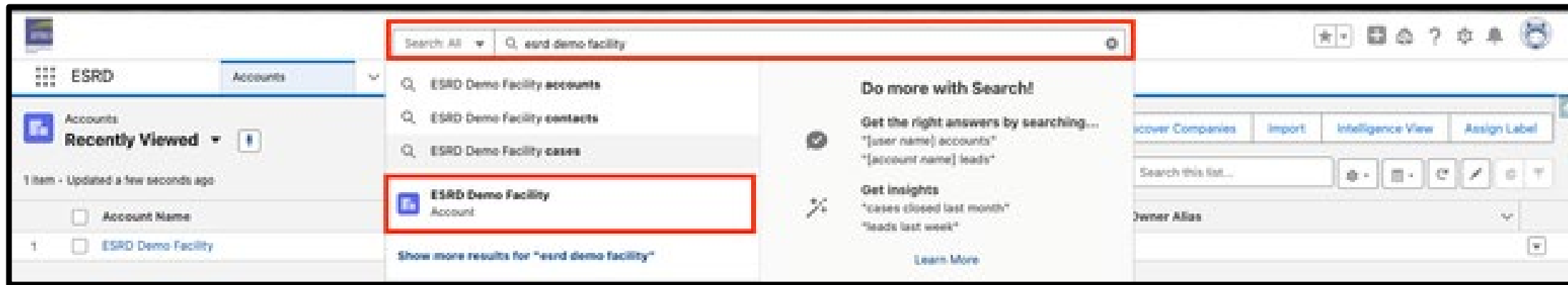
Fresenius Vascular Access Clinic Atlanta

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

Searching for a Facility or Account



From the top of your screen using Global Search, search for a Facility using Account Name, Doing Business As Name, CCN, NPI or TIN and click on facility.



If your account already exists, you can view the facility details important to your business area.

If the account does not exist, follow your department procedure for creating new facilities, health systems, community organizations, or other account types

ESRD Details	
Facility Open Date 1/1/2025	Facility Status Pending Certification
Certified Services	Independent <input type="checkbox"/>
Network Network 1	Facility Certified Date 1/1/2025
Auth_BSO_desc ESRD Test Facility	Facility ID 0000123123
	EQRS Facility Demographic EFD-0003

Account Screen Layout



The Account layout contains basic information on a facility. You can get a quick-glance view of:

- Which departments are working with an account
- Contacts
- Completed and assigned tasks
- Related information
- Attached file records

Account
Corina Testing Account LLC

Also Known As Account Type: Facility Phone Account Owner: Corina Downey-Konkus

Details Related CMS COVID-19 Data Files

Account Information

Account Name	Corina Testing Account LLC	Account Source	
Parent Account		Account Owner	Corina Downey-Konkus
Account Type	Facility	Phone	
Facility Type	Hospital	Fax	
Designation	Acute Care:Emergency Department	Website	
Description		Related Contracts	
ESRD Facility	<input type="checkbox"/>	Total Licensed Beds	
SHCA Facility	<input checked="" type="checkbox"/>	Also Known As	
HQIC Facility	<input checked="" type="checkbox"/>	Facility Name History	
TO1 Task 3 Facility	<input type="checkbox"/>	Active	<input checked="" type="checkbox"/>

Related Contacts (3+)

- Nic Barton**
SHCA Roles:
13th SOW Roles: Administrator
Task 3 Roles: Administrator;AHQT Point of Contact
- Ritha Choudhury-Rahman**
SHCA Roles:
13th SOW Roles:
Task 3 Roles:

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

- SFAE: QIN-QIO Outreach Aug 17, 2024
Ira Dave has an upcoming task with Corina Downey-Konkus
- SFAE: QIN-QIO Outreach Aug 10, 2024
You have an upcoming task with Rurik Peterson

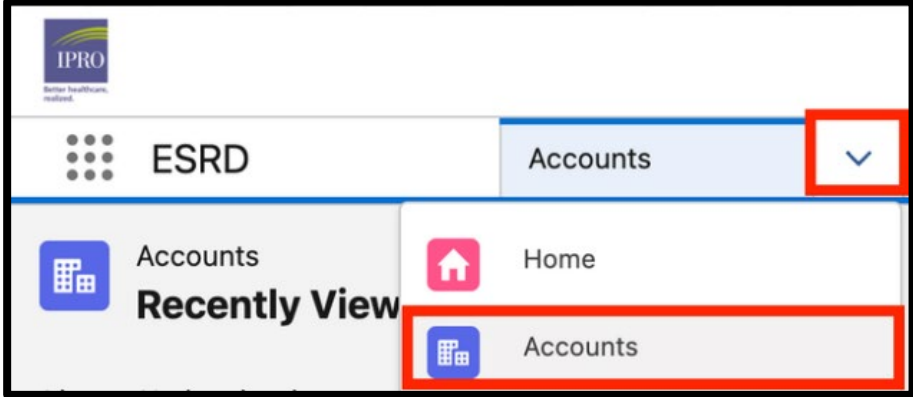
May - 2025 This Month

- Outbound to 1629 May 13
You logged a call with Nic Barton
- Outbound to +15162095410 May 13
You logged a call with Ritha Choudhury-Rahman
- Outbound to +15162095410 May 12
You logged a call with Ritha Choudhury-Rahman

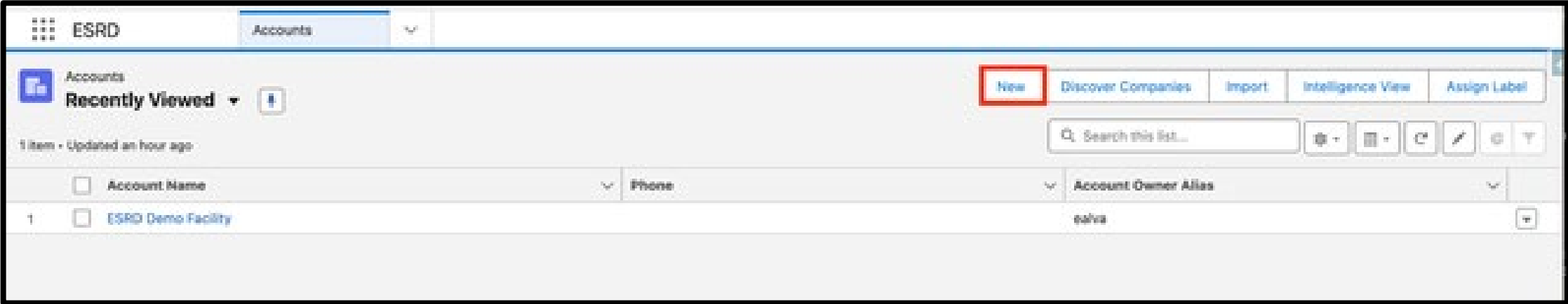
Creating a New Facility or Account



From the menu dropdown click Accounts.



Click the New button located in the top right corner



Creating New Facility or Account Types



New Account

Payer
Replaces HealthCloudGA Payer Record Type

Facility
Used to capture Account information about facilities

Health System
Used for Health Systems

Provider
Represents a Provider (used by CMS IDR)

Account Type	Associated Account Sub-Types
Community Organization	<ul style="list-style-type: none"> Faith Based Organization School or Educational Institution Social Service Group Community Center (Federally Qualified Health Centers)
Facility	<ul style="list-style-type: none"> Aging Resource Center Disability Resource Center Adult Day Care Transportation Service 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	<ul style="list-style-type: none"> Department of Health Department of Corrections Emergency Management Veterans Administration Policy Agencies Federal Agencies State Agencies
Professional Association	<ul style="list-style-type: none"> Care Partner Advocacy Patient Advocacy Professional Advocacy Research Institute

Select Facility and click Next.

There are multiple Facility Account Types and Subtypes to further specify the type of account being created.



Tip: Review the Account and Contact Management Best Practices in Salesforce Training for more details on the creation and management of different account types.

Adding Designations to an Account

Accounts can have Multiple Designations



Review and Understand the Designation Definitions on the Salesforce Portal



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

Creating New Account



1. Enter the *Account Name
2. Enter the Also Known As Name (sometimes called Doing Business As Name)
3. Search for a Parent Account, ex: for a Facility that could be Davita or a hospital group, for a Government Organization it could be Veterans Affairs or a State Agency
4. *Account Type - Facility, Community Org, Government Org
5. *Facility Type (select 1): Dialysis Center, Transplant Center, or Hospital
6. Choose Designations (select as needed): Hospital Based Renal Dialysis Facility, Hospital Based Satellite Renal Dialysis Facility, Transplant, Urban, Rural etc.
7. Mark the Facility as * Active



TIP: You can find the full list of Designations here <https://salesforce.ipro.help/hc/en-us/articles/34432995448467-Account-Designation-s>

Account Information

* Account Name
ESRD Test Facility 2

Also Known As

Facility Name History

Parent Account
Search Accounts...

* Account Type
Facility
[View all dependencies](#)

Facility Type
Dialysis Center
[View all dependencies](#)

Designation

Available

Accountable Care ...

Acute Care

Ambulatory Surgica...

Chosen

Account Source
--None--

Phone

Fax

Website

Related Contracts

Available

NQIIC TO3

NQIIC TO1

NQIIC TAQIL

Chosen

Total Licensed Beds

Active

Cancel Save & New Save

Creating New Account



Enter the Billing Address (this can be the same as physical location is no billing address is known)

Address Information

Billing Address		Location Address	
<input type="text" value="Search Address"/>	<input type="text" value="Search Address"/>	<input type="text" value="Search Address"/>	<input type="text" value="Search Address"/>
<input type="text" value="Billing Street"/>	<input type="text" value="Billing State/Province"/>	<input type="text" value="Location Street"/>	<input type="text" value="Location State/Province"/>
<input type="text" value="Billing City"/>	<input type="text" value="Billing State/Province"/>	<input type="text" value="Location City"/>	<input type="text" value="Location State/Province"/>
<input type="text" value="Billing Zip/Postal Code"/>	<input type="text" value="Billing Country"/>	<input type="text" value="Location Zip/Postal Code"/>	<input type="text" value="Location Country"/>
<input type="text" value="Geographic Region"/>		<input type="text" value="Location County"/>	
<input type="text" value="--None--"/>			
<input type="text" value="County"/>			
<input type="text" value="--None--"/>			

Enter the ID NPI or ID CCN (new facilities that are pending certification will require an ID NPI be added until certification is complete)

Identifiers

<input type="text" value="Federal ID"/>	<input type="text" value="ID Operating Certificate"/>
<input type="text" value="HSA Code"/>	<input type="text" value="ID CCN"/>
<input type="text" value="HRR Code"/>	<input type="text" value="ID NPI"/>
<input type="text" value="County FIPS ⓘ"/>	<input type="text" value="TIN ⓘ"/>
<input type="text" value="State FIPS ⓘ"/>	<input type="text" value="NYSMLocatorCode"/>
	<input type="text" value="NYSM Provider Number"/>



All fields with a * red asterisk are required along with Billing Address OR Location Address and ID NPI OR ID CCN OR TIN before saving the record

Creating New Account



If Facility is Independently owned leave Parent Account blank under Account Information section and select the Independent (Checkbox) under the ESRD Facility Details section

ESRD Details

Facility Open Date

Certified Services

Network

Auth_BSO_desc

Facility Status

Pending Certification

Independent

Facility ID

Facility Certified Date

Contacts

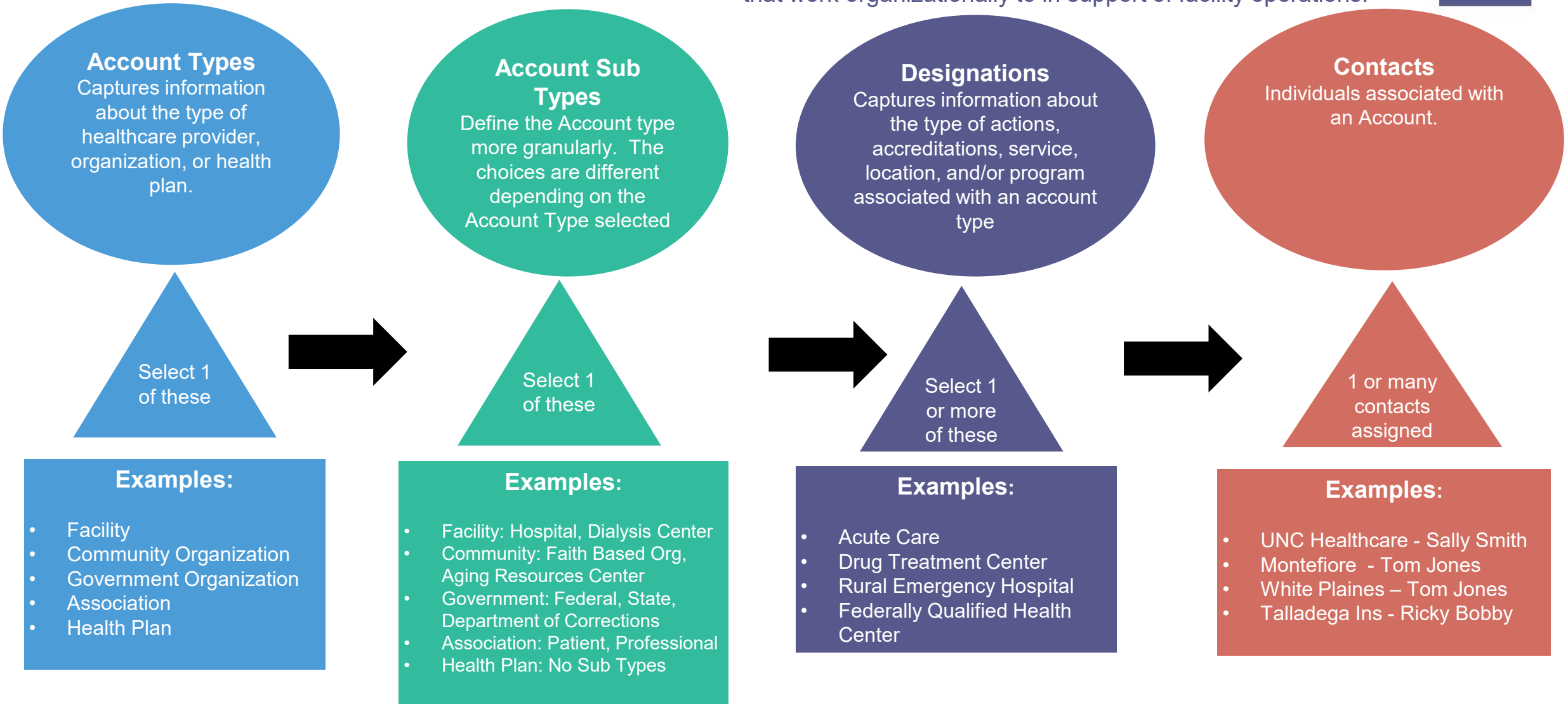
Salesforce Contacts

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.



Contact Screen Layout



- Like with the account, the Contact record will have all the important details listed
- Salesforce requires that each Contact is assigned a Primary Account Relationship, and all other relationships are considered secondary
- The Primary relationship is the Account listed on the main page of the Contact Record
- Additional Related Accounts are found in a side panel as well as Activities

The screenshot displays the Salesforce Contact Record for Nic Barton. The interface is divided into several sections:

- Contact Header:** Shows the contact name "Nic Barton" and a summary of key details: Title, Email (nbarton@ipro.org), Phone (1629), Account Name (Corina Testing Account LLC), and Contact Owner (Corina Downey-Konkus).
- Details Panel:** A sidebar on the left containing sections for "Contact Information" (Account Name: Corina Testing Account LLC, Name: Nic Barton, Title, Active status, Inactive Date) and "Address Information" (Account Mailing Address: 123 Main St, Anytown, MI 48348).
- Related Accounts Panel:** A side panel on the right titled "Related Accounts (2)" showing two accounts: "Corina Testing Account LLC" (Direct relationship) and "Task 3 Production Testing Account" (Secondary relationship).
- Activity Panel:** A bottom-right panel titled "Activity" showing an "Engagement History" with a list of activities. The list includes "Outbound to 1629" (May 13, 2025), "Outbound to +15162606895" (Feb 1, 2024), and "Outbound to +15162606895" (Jul 28, 2023).

Contacts

Enforcing Uniqueness in Contacts



Required Fields to add/save a Contact:

- Contact Formal Name
- Account Name
- One method of contact: Phone Or Mobile Number Or Email Address

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

- Mailing Address
- Title
- Contact Role
- 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

Creating a New Contact



The screenshot shows the 'New Case: ESRD - New Facility' form. The 'Accounts' dropdown menu is open, showing 'American Kidney Center' selected. The 'New Cas...' dropdown is also open. The form fields include Case Number, Case Owner (Shannon Wright), Account Name (American Kidney Center), and Contact Name (Search Contacts...). The 'Case Information' section is highlighted.

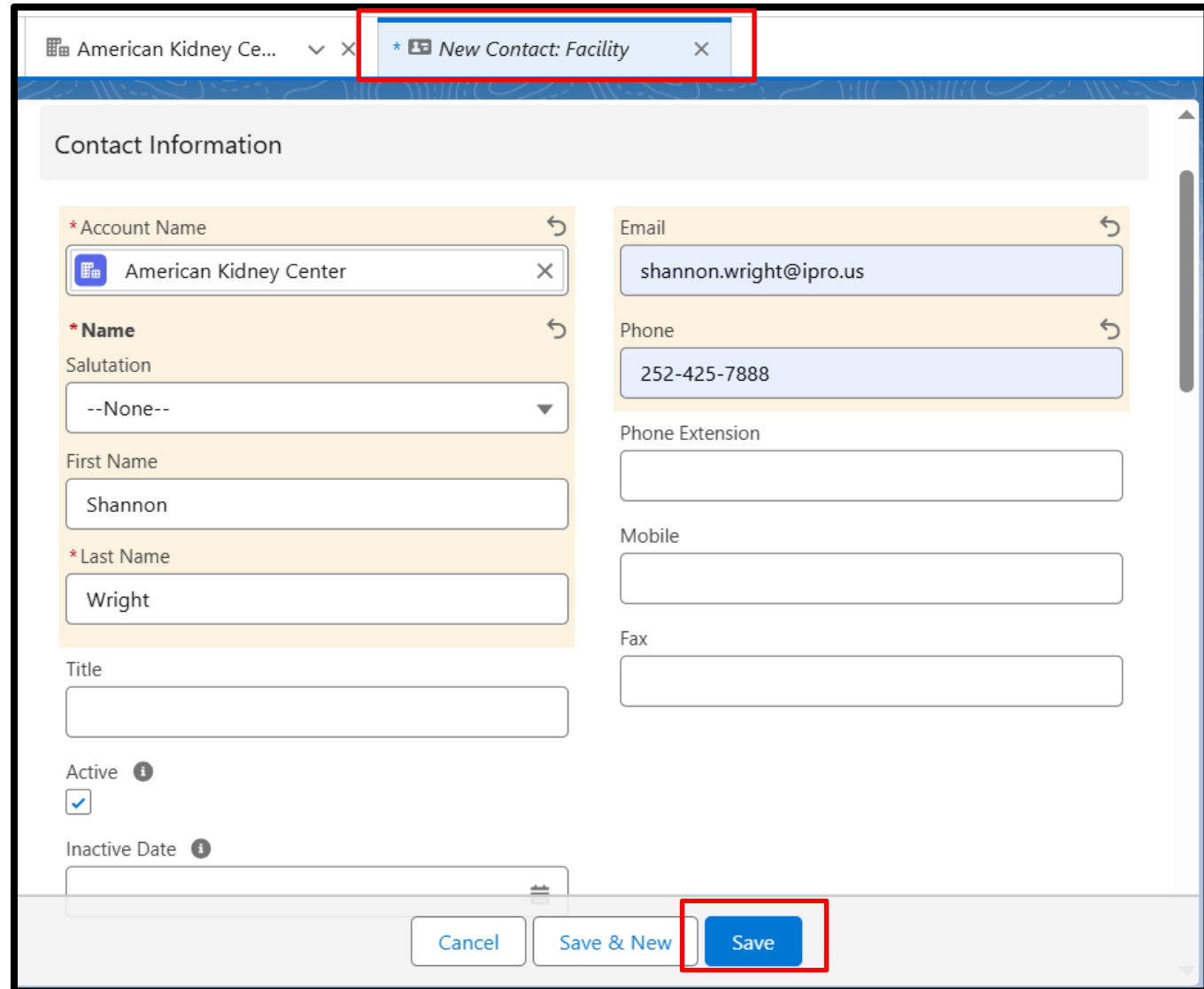
- Before adding a new Contact, use the search to see if they already exist. If they do not, create new
- From the dropdown, Select Contacts
- Select New to create a new Contact
- **Note:** A separate tab is created, the American Kidney Center Case Tab and Account tab are still available

The screenshot shows the 'Contacts' page. The 'New' button is highlighted. The table below shows a list of contacts with columns for Name, Account Name, Account Name, P..., Email, Contact O..., and Active.

	Name	Account Name	Acco...	P...	Email	Contact O...	Active
1	Shannon Wright	Shannons Test Facility	NC		shannonbwright@hotmail.com	swrig	✓
2	Maria Steiner	New York Presbyterian/westchester Division	NY	(914) ...	mas9175@nyp.org	pgagl	✓
3	Maria Steiner	New York - Presbyterian - Westchester Division	NY	(914) ...	mas9175@nyp.org	mrobe	✓

Creating a New Contact

- Search for the Account Name to be assigned to the Contact
- Enter the Contact information
Note: Name and either phone or email is required.
- The Address section is optional
- Click Save



American Kidney Ce... x * New Contact: Facility x

Contact Information

* Account Name ↶
American Kidney Center x

* Name ↶
Salutation
--None-- ▾

First Name
Shannon

* Last Name
Wright

Title

Active ⓘ

Inactive Date ⓘ

Email ↶
shannon.wright@ipro.us

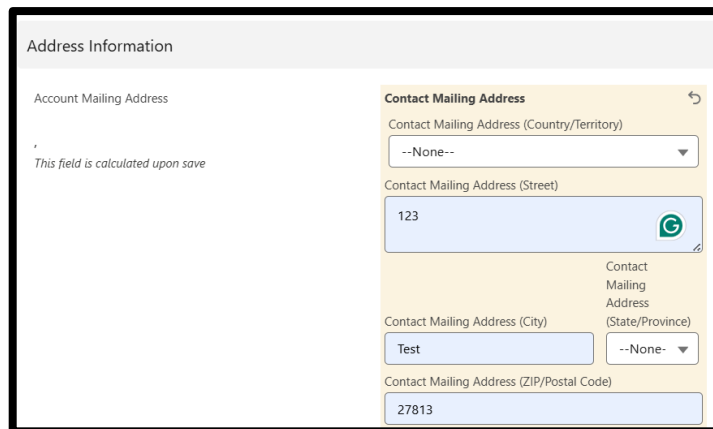
Phone ↶
252-425-7888

Phone Extension

Mobile

Fax

Cancel Save & New Save



Address Information

Account Mailing Address

Contact Mailing Address ↶

Contact Mailing Address (Country/Territory)
--None-- ▾

Contact Mailing Address (Street)
123

Contact Mailing Address (City)
Test

Contact Mailing Address (ZIP/Postal Code)
27813

Accounts, Contacts, and ACR Objects



How does everything tie together?

Since a Contact can be associated with many Accounts, and an Account can have many Contacts, the Account Contact Relationship (ACR) Object ties them together capturing the many-to-many relationship that can potentially exist between Accounts and Contacts.

It is through the ACR that users assign different Roles that a Contact may have to each different Account.

Account	Contact	Business Unit 1 Role	Business Unit 2 Role
Hospital A	John Smith	Data Contact	
Hospital A	Charlie Chaplin	CEO	Moustache Groomer
Hospital B	John Smith	Administrator	Data Contact
Hospital B	Ron Smith	Medical Consultant	Medical Consultant
Hospital B	Don Smith	DON	
Hospital C	Charlie Chaplin	CEO	Hat Salesman

- John Smith is a contact at Hospital A and Hospital B.
- Contacts have a Role assigned for each ACR. Roles can be specific to a business unit, or they can be the same across multiple business units
- Hospital B lists John Smith as the Administrator for Business Unit 1, and the Data Contact for Business Unit 2, Ron Smith as the Medical Consultant, and Don Smith as a Director of Nursing
- John, Ron, and Don will only exist in the Contacts Object once
- Hospital A and Hospital B will only exist in the Accounts Object once

Adding Contact Roles



Review and Understand the Contact Role Definitions on the Salesforce Portal



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
- **Department Specific information can be included in the title of the contact**

Salesforce Role	ESRD Role / Title
• Administrator	<ul style="list-style-type: none"> • Dialysis Administrative Assistant • Dialysis Facility Administrator • Transplant Center Administrator
• Care Manager	<ul style="list-style-type: none"> • Transplant Center Coordinator
• Corporate	<ul style="list-style-type: none"> • Regional Director of Operations • Regional / Divisional Vice President
• Data Contact	<ul style="list-style-type: none"> • Dialysis Data EQRS Contact • Transplant Center Data Contact • Transplant Center EQRS Transplant Editor Role
• Dietician	<ul style="list-style-type: none"> • Dietician
• File Uploader	<ul style="list-style-type: none"> • Transplant E-Start Contact
• Infection Prevention	<ul style="list-style-type: none"> • Dialysis Infection Prevention Lead

Salesforce Role	ESRD Role / Title
• Medical Director	<ul style="list-style-type: none"> • Dialysis Medical Director • Transplant Center Medical Director
• Medical Office Staff	Dialysis Administrative Assistant
• Nurse or Nurse Practitioner	<ul style="list-style-type: none"> • Dialysis Physician Extender Role (NP or PA)
• Nurse Director	<ul style="list-style-type: none"> • Dialysis Head Nurse / Nurse Supervisor
• Physician	<ul style="list-style-type: none"> • Transplant Center Nephrologist • Dialysis Nephrologist
• Surgeon	<ul style="list-style-type: none"> • Surgeon
• Quality	<ul style="list-style-type: none"> • Regional Quality Manager
• Social Worker	<ul style="list-style-type: none"> • Transplant Center Social Worker • Dialysis Social Worker

Salesforce Role	ESRD Role / Title
• Home Dialysis Program Manager	<ul style="list-style-type: none"> • Home Dialysis Program Manager
• Chronic Kidney Disease Educator	<ul style="list-style-type: none"> • Chronic Kidney Disease Educator
• State Surveyor	<ul style="list-style-type: none"> • State Surveyor
• Healthcare Coalition Lead	<ul style="list-style-type: none"> • Healthcare Coalition Lead
• Patient/Caregiver Representative	<ul style="list-style-type: none"> • Patient/Caregiver Representative

Creating a New Contact



ESRD | Contacts | Shannon Wright | Co... | American Kidney Ce...

Contact **Shannon Wright** [Add] [Follow] [Edit] [Change Owner] [Printable View]

Title	Email	Phone	Account Name	Contact Owner
	shannon.wright@ipro.us	252-425-7888	American Kidney Center	Shannon Wright

Details | Related | Files

▼ Contact Information

Account Name	American Kidney Center	Email	shannon.wright@ipro.us
Name	Shannon Wright	Phone	252-425-7888
Title		Phone Extension	

We found no potential duplicates of this Contact.

Related Accounts (1)

[American Kidney Center](#)

Direct:

Roles: 13th SOW Roles

[View Relationship](#)

[Edit Relationship](#)

- From the newly created contact record, add the role(s) of the contact by selecting the Add Relationship in the Related Accounts section
- Scroll until you see your department's list and select the role(s) to assign to the Contact and Save the record
- Click Save

ESRD R | Move selection to Chosen

Available	Chosen
Administrator	Care Manager
AHQT Point of Co...	
Chronic Kidney Di...	
Clinician	

Cases

Cases



- Cases is the object where the majority of the IPRO team does their departmental work.
- Depending on the department, a Case can represent different things:
 - An individual dispute that IPRO is evaluating
 - Quality Improvement Initiative
 - Technical assistance
- Cases capture all the relevant data IPRO needs to properly manage and execute our contracts. Exactly what data is shown on a Case is determined by the need of each department.



TIP: Where Account and Contact data and interactions are shared with other departments, Case information and interactions are viewable only within the department to which they belong.

Final Note on Salesforce Objects

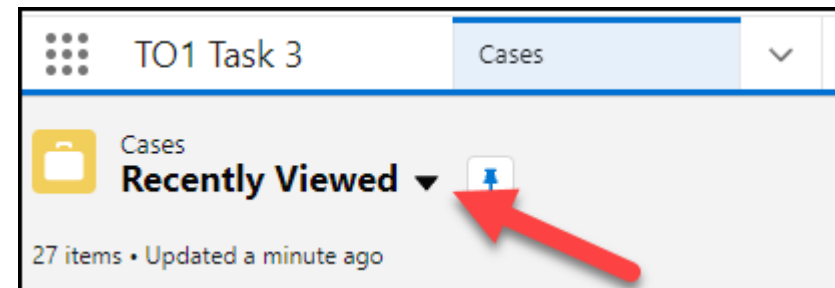
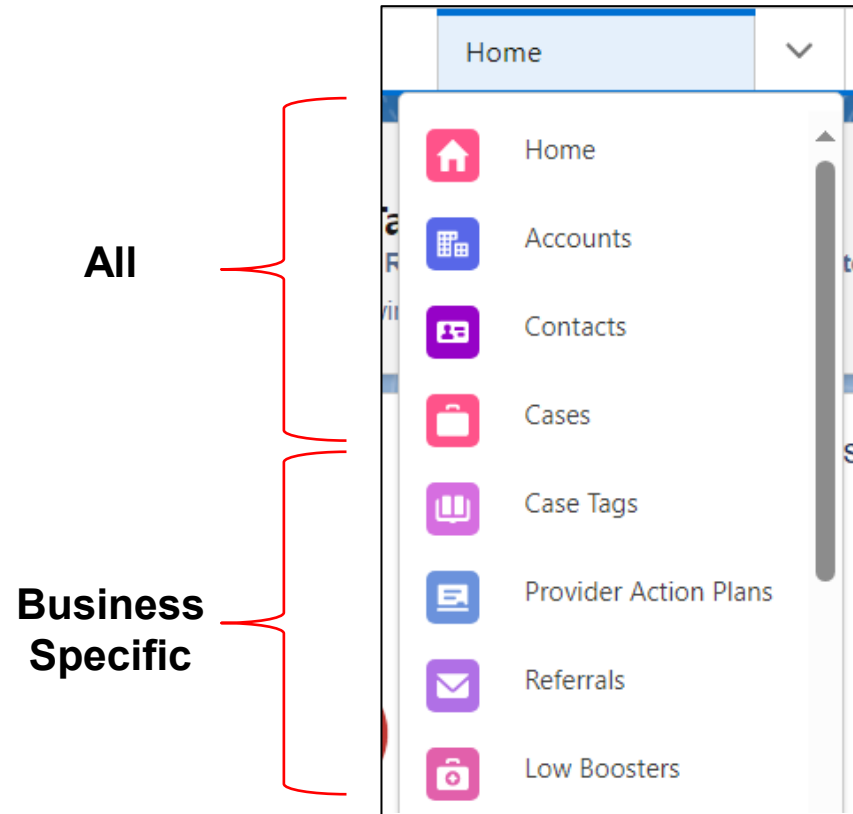


- All business areas have Home, Accounts, Contacts, and Cases object access
- Additional Salesforce objects may be created specifically to meet the needs of your business area
- Outside of Account and Contact, Salesforce data security limits access to other Objects and is considered private to the department who created it

Part 4: Leveraging List Views

List Views

- List views are a filtered list of data stored in an object. To access List views, use the dropdown box and select the object that you would like to access a subset of data from.
- Each object will have a different set of list views and access to the views might be limited by department
- The list view will default to the user's "Recently Viewed" list, but you can change the list view by using the dropdown arrow
- User can pin their favorite list view by clicking the push pin icon next to the list view arrow



Anatomy of a List View



The Salesforce Support Team will use filters to create curated list views that can be utilized for each department

1. List View dropdown menu - Click ▼ to access your list views.

2. Pin list icon - Click 📌 to pin a list view. A pinned list is the default.

3. To sort the list, you can click on any column. You will see a small arrow next to the column you sorted that indicates there's a sort in use

4. Refresh icon - Click ↻ to get a fresh view of a list more quickly than doing a full page reload.

50+ items • Sorted by Email • Filtered by All contacts • Updated a few seconds ago

	<input type="checkbox"/> Name	Account Name	Title	Phone	E... ↑	Cont...	Acco...	External ID
1	<input type="checkbox"/> Misty Fleming	Penn Highlands DuBois		(814) 371-2200		jbisb	Hospital	
2	<input type="checkbox"/> Roxanne Williams	BLANCHARD VALLEY HOSPITAL		(419) 423-4500		jbisb	Hospital	
3	<input type="checkbox"/> Anna Japaridze	BAYSTATE FRANKLIN MEDICAL CENTER	Physician	(413) 773-2694		gthor	Hospital	HQIC_TA_a0Yf100000crbAxEAI
4	<input type="checkbox"/> Aseesh Sreedharala	BAYSTATE FRANKLIN MEDICAL CENTER	Physician			gthor	Hospital	HQIC_TA_a0Yf100000crbE3EAI
5	<input type="checkbox"/> Bhavya Rajanna	BAYSTATE FRANKLIN MEDICAL CENTER	Physician	(413) 773-2694		gthor	Hospital	HQIC_TA_a0Yf100000crbGwEAI
6	<input type="checkbox"/> Julius Tabe V	LOWELL GENERAL HOSPITAL	Physician			gthor	Hospital	HQIC_TA_a0Yf100000crcPYEAY

Quick Access from List Views



List views are a convenient way to access multiple data points on an object at a glance, but it can also be used to navigate directly to a record page by selecting one of the fields hyperlinked in blue.

<input type="checkbox"/>	Case Number ↑	Subject	Status
<input type="checkbox"/>	00027985	test qii	Open
<input type="checkbox"/>	00027986	REF123 QII	Open
<input type="checkbox"/>	00027989	test	Open

Case: **test qii** Edit Clone

Priority: Normal | Status: Open | Case Number: 00027985

Progress: **Open** → Timely → Reinstated → QII Interrupted → Referred to Special C... → Closed

Status: **Open** Mark Status as Complete

Related List Quick Links

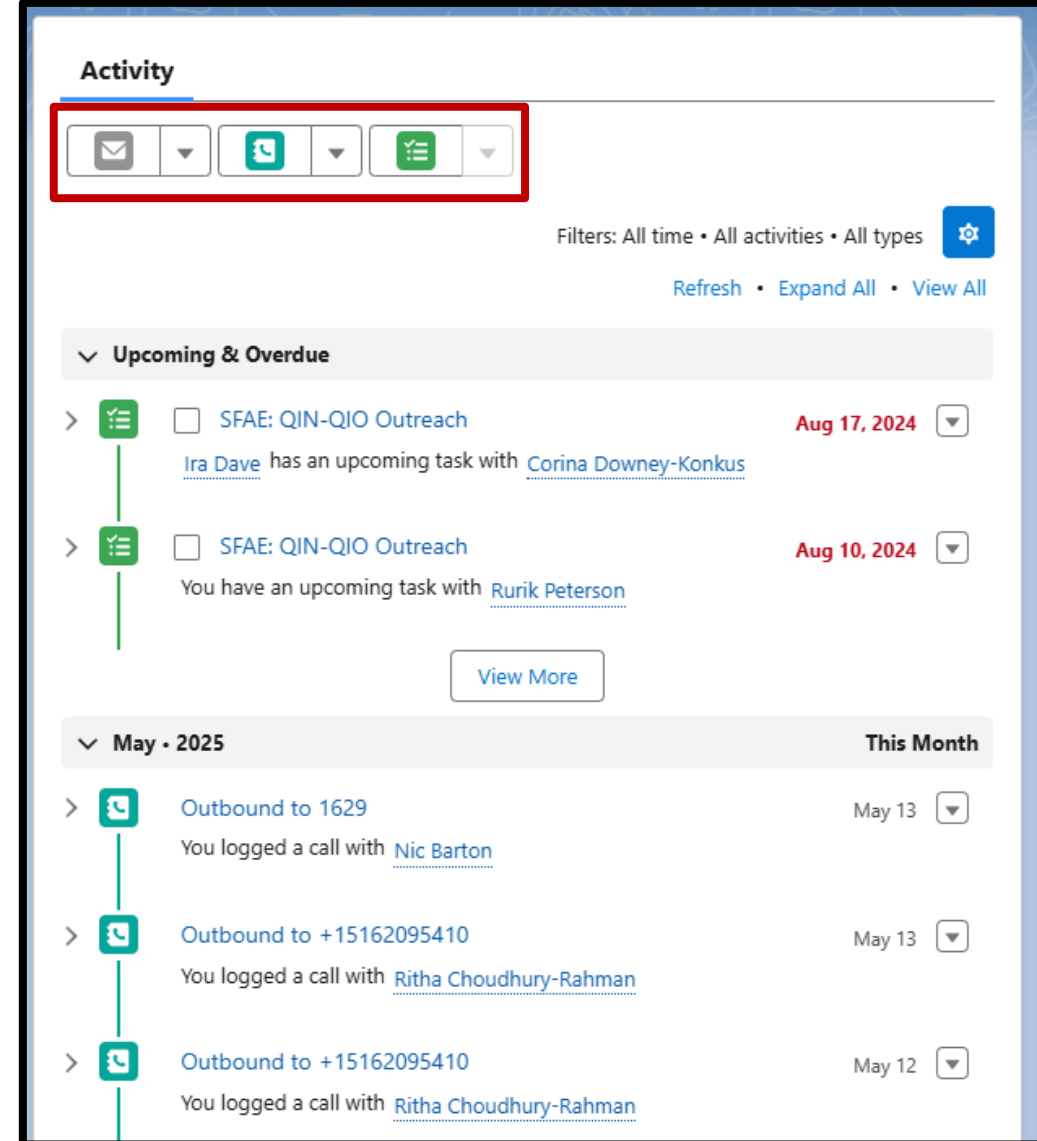
- Responses (0)
- Case Comments (0)
- Files (0)
- Action Plans (1)
- Contact Roles (0)
- Open Activities (10+)
- Time Entries (3)
- Provider Action Plans (2)

Show All (13)

Part 5: Using Activities and Work Plans

Activity Tracking

- The Activity Panel is where you can create an email, detail a phone call, or log a future or completed task.
- Activities relate to the record they are attached. It is important to remember visibility when creating Activities.
 - The Account and Contact objects are visible to all IPRO staff, adding activities here would make them available to other departments.
 - Cases and other custom objects are limited to specific departments, and therefore activities created there have no visibility to the rest of IPRO.



The screenshot displays the 'Activity' panel in a software interface. At the top, there is a navigation bar with three icons: an envelope (email), a telephone handset (phone call), and a checklist (task). These icons are highlighted with a red rectangular box. To the right of the navigation bar, there are filter options: 'Filters: All time • All activities • All types' and a settings gear icon. Below the filters, there are links for 'Refresh', 'Expand All', and 'View All'. The main content area is divided into two sections. The first section is titled 'Upcoming & Overdue' and contains two entries. Each entry starts with a green checklist icon, followed by a checkbox, the text 'SFAE: QIN-QIO Outreach', and a date. The first entry is dated 'Aug 17, 2024' and includes the text 'Ira Dave has an upcoming task with Corina Downey-Konkus'. The second entry is dated 'Aug 10, 2024' and includes the text 'You have an upcoming task with Rurik Peterson'. A 'View More' button is located below these entries. The second section is titled 'May • 2025' and is labeled 'This Month'. It contains three entries, each starting with a green telephone handset icon, followed by the text 'Outbound to [phone number]', the text 'You logged a call with [name]', and a date. The first entry is dated 'May 13' and includes the name 'Nic Barton'. The second and third entries are also dated 'May 13' and 'May 12' respectively, and both include the name 'Ritha Choudhury-Rahman'.

Sending Email from Salesforce



- When you click the email icon, an email widget will appear and automatically put your information into the From line.
- Add the Contact you want to send the email to by either searching the contact name in the To line or manually add the email address.
- Depending on the object you are creating the email from, the subject may or may not auto populate. You can change any of the information in From, To, or Subject prior to sending the email

The screenshot shows the Salesforce Activity feed. At the top, there are three icons: an email icon (highlighted with a red box), a chat icon, and a task icon. Below the icons, there are filters for 'All time', 'All activities', and 'All types'. The main content area is divided into sections: 'Upcoming & Overdue' and 'May - 2025'. The 'Upcoming & Overdue' section contains two tasks: 'SFAE: QIN-QIO Outreach' with a due date of 'Aug 17, 2024' and 'SFAE: QIN-QIO Outreach' with a due date of 'Aug 10, 2024'. The 'May - 2025' section contains three call logs: 'Outbound to 1629' on May 13, 'Outbound to +15162095410' on May 13, and 'Outbound to +15162095410' on May 12.

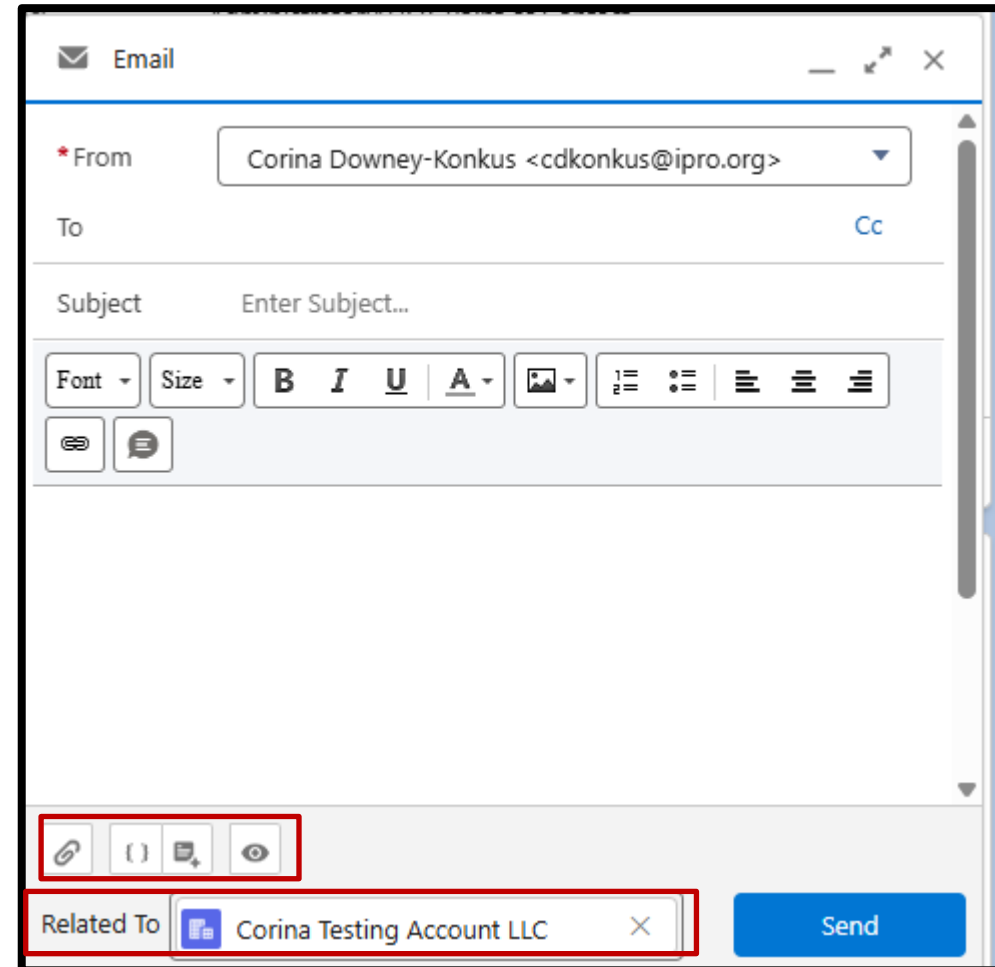
The screenshot shows the Salesforce email composition window. The 'From' field is highlighted with a red box and contains the text 'Corina Downey-Konkus <cdkonkus@ipro.org>'. The 'To' field contains 'Jonathan Goodwin X' and the 'Cc' field is empty. The 'Subject' field contains the placeholder text 'Enter Subject...'. Below the fields, there is a rich text editor with various formatting options like bold, italic, underline, and text color. At the bottom right, there is a blue 'Send' button.

Activities: Sending Email from Salesforce

At the bottom of the email pane you will see a series of icons.

- The paperclip allows you to attach a document to the email
- The brackets allow you to insert a merged field
- The document allows you to select from pre-created department templates
- The eye shows you a preview of the email with all merge field data prior to sending

One more important field to note is the Related To field. This field will attach the email you are sending to the record showing here. You can change this relationship by hitting the X to remove the record and then search for the correct record.



Current Salesforce email policy does not allow for the use of CC or BCC; add all contacts in the To field. Per IS security, do not use Salesforce to send PHI or PII.

Salesforce and Outlook Integration



Outlook and Salesforce can be connected to capture a copy of emails sent to providers, facilities, hospitals, or other IPRO clients allowing for future reference or deliverable reporting.

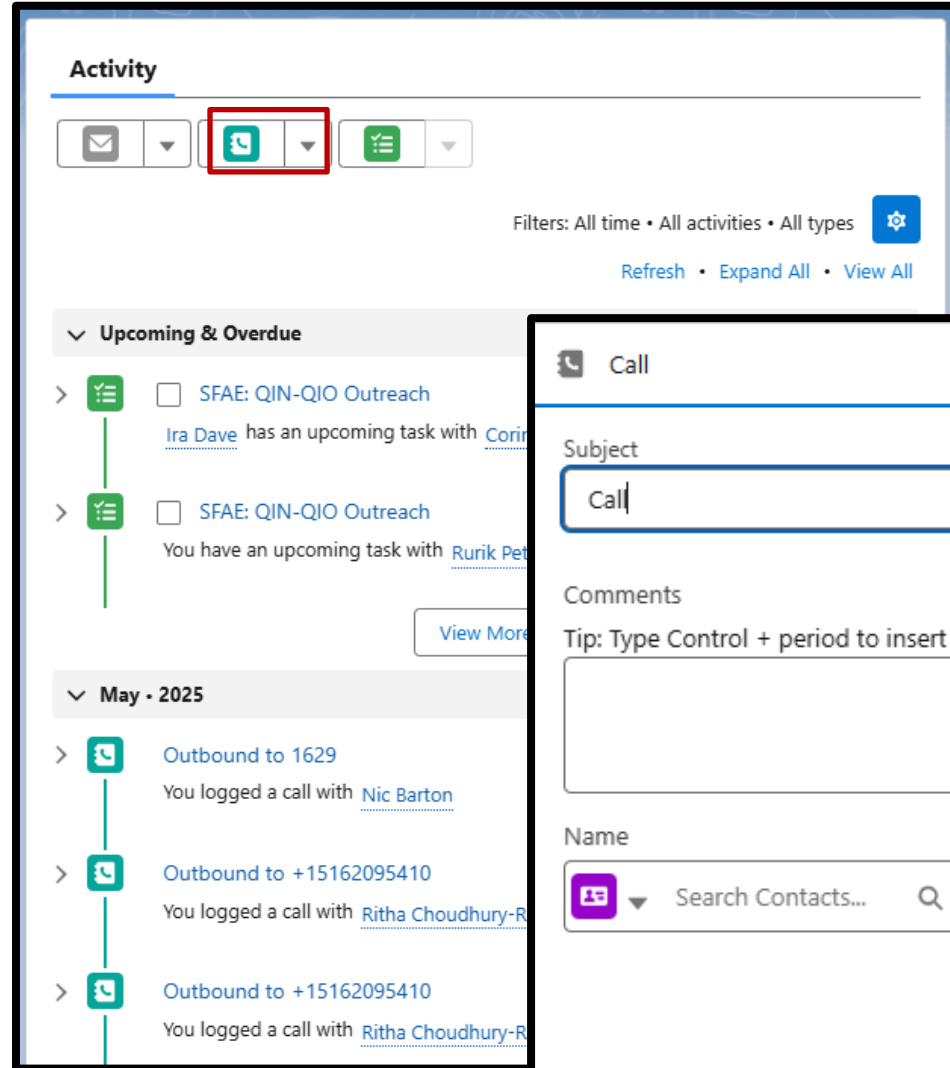
This integration allows you to send a copy of an email you have sent from Outlook or have received via Outlook over to Salesforce.

See the Outlook Integration documentation on the IPRO Salesforce Support page for setting up the Salesforce Plug-in for Outlook and detailed training <https://salesforce.ipro.help/hc/en-us>

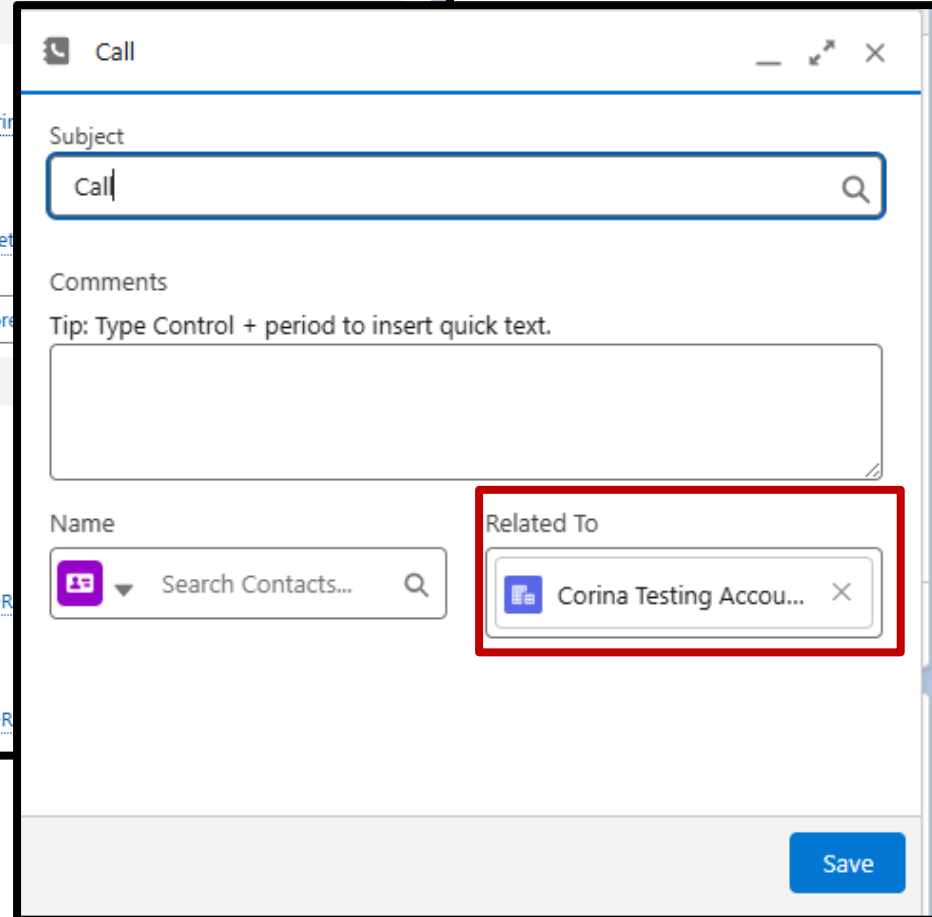


Activities: Logging a Call in Salesforce

- The “Log a Call” icon can be used to create notes for a call that has taken place in the past and has not yet been recorded as an Activity in Salesforce.
- Change the Subject from Call to your departmental approved subject line or you can leave it as Call, then add any Comments about the call that was placed.
- Be sure to relate the Call to a Case or other appropriate Object based on the visibility needed for this activity.
- When saving the “Log a Call” activity, it will automatically set the record as Complete.



The image shows two screenshots from the Salesforce interface. The left screenshot displays the 'Activity' feed with a red box highlighting the 'Log a Call' icon (a telephone handset) in the top navigation bar. Below the feed, there are sections for 'Upcoming & Overdue' and 'May - 2025', each containing call logs with details like 'Outbound to 1629' and 'Outbound to +15162095410'. The right screenshot shows the 'Call' form with a red box highlighting the 'Related To' dropdown menu, which is set to 'Corina Testing Accou...'. The form also includes fields for 'Subject' (containing 'Call'), 'Comments', and 'Name'.

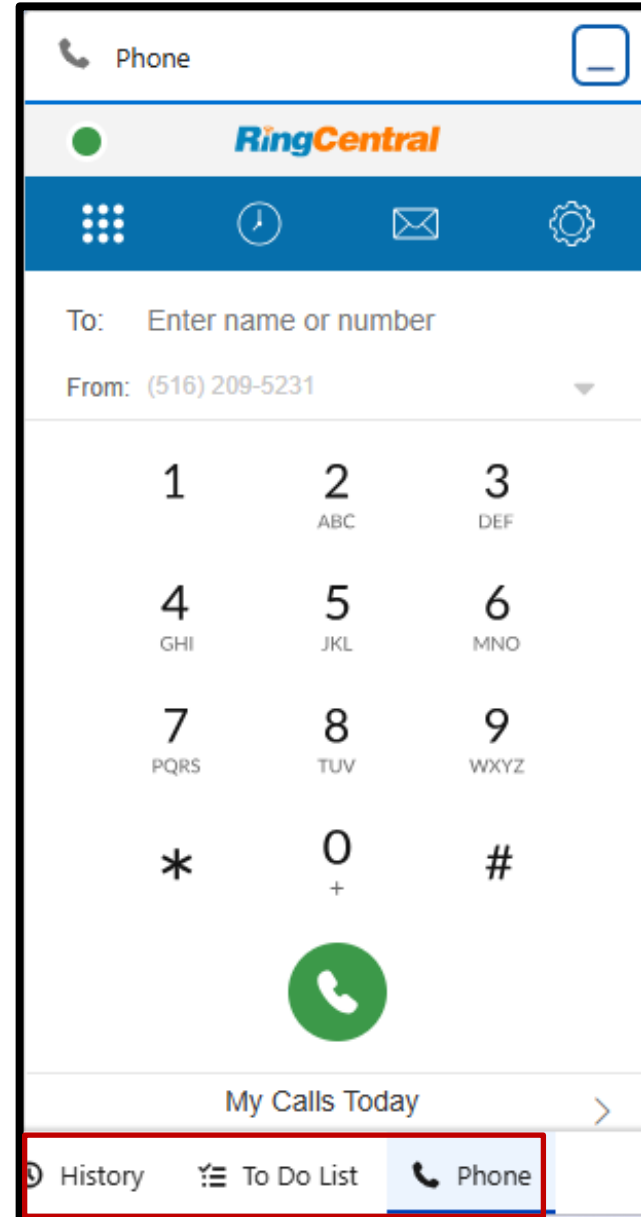


This is a close-up of the 'Call' form. The 'Subject' field contains the text 'Call'. The 'Comments' field has a tip: 'Tip: Type Control + period to insert quick text.' The 'Name' field has a search bar with the text 'Search Contacts...'. The 'Related To' dropdown menu is highlighted with a red box and shows 'Corina Testing Accou...' as the selected option. A 'Save' button is visible at the bottom right of the form.

Salesforce and RingCentral Integration

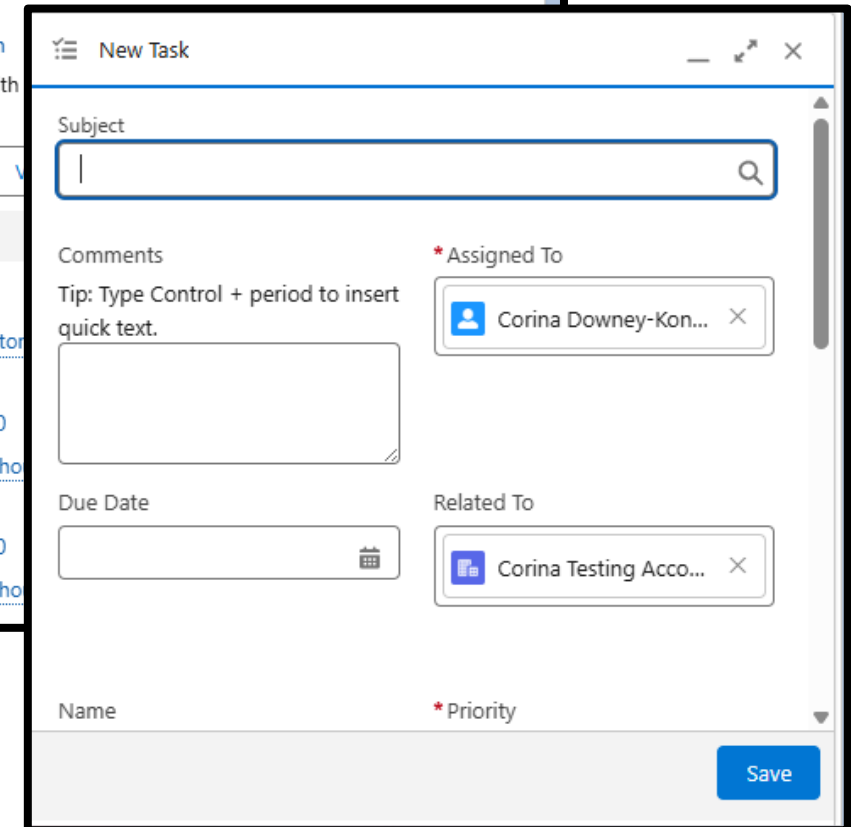
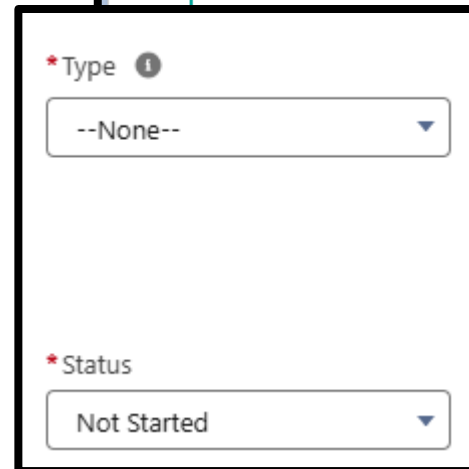
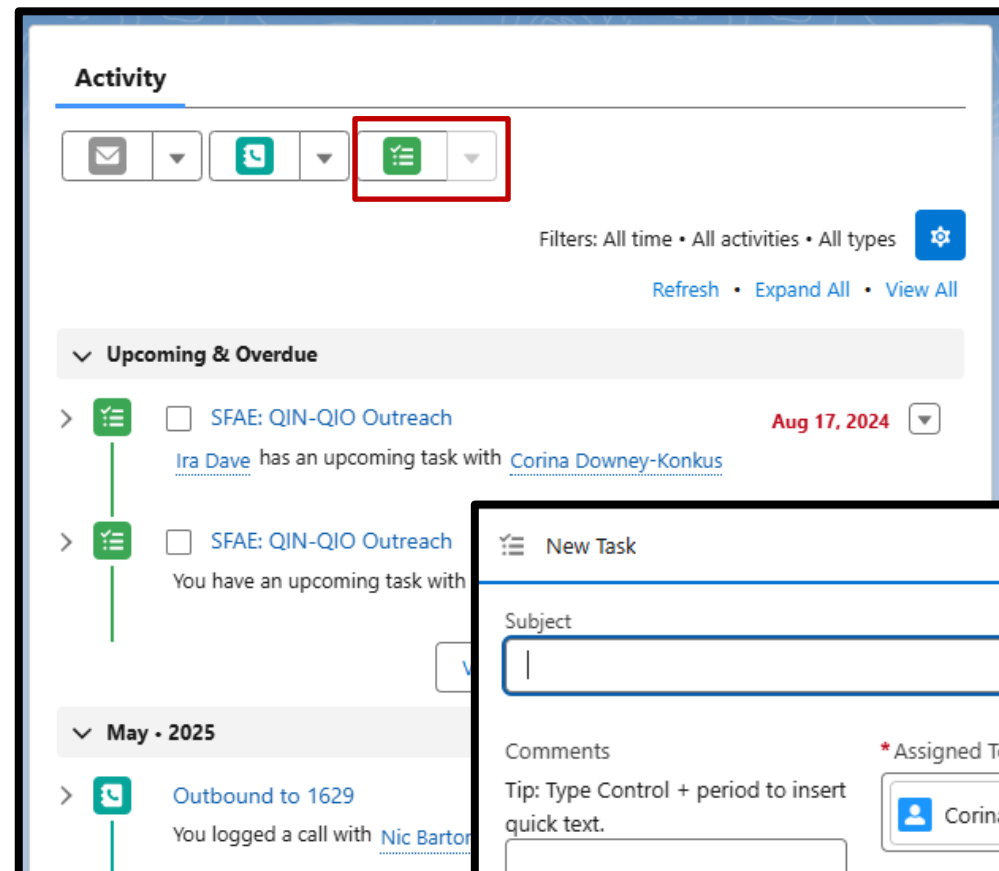


- Salesforce utilizes RingCentral as the telephone service to capture details about a phone call, use the autodial functionality, and dial pad option.
- If you have a RingCentral phone number connected with Salesforce, you will see a bottom tool bar with a phone icon.
- See the RingCentral Integration documentation on the IPRO Salesforce Support page for setting up the RingCentral app and detailed training <https://salesforce.ipro.help/hc/en-us>



Activities: Creating a Task

- The Activity icon is used to create tasks for yourself or for other team members.
- Change the Subject to your departmental approved subject line, assign the task to yourself or someone else, and select a Due Date.
- Be sure to relate the Activity to a Case or other appropriate Object based on the visibility needed for this activity, add a Type and mark the Status as either Not Started or Complete.
- If you have assigned the task to be completed by another user, Salesforce will automatically send a notification to that user once you save the task.



Workplans: Creating a Task Series



- Workplans allows managers to create a template that contains a series of tasks that need to be completed
- Each department can have multiple Workplan Templates published

Work Plans > ESRD - Facility Closure - Permanent/Decertified

Activities

4 items • Sorted by Due Date • Updated a few seconds ago

	Subject	Assigned To	Related To	Status
1	Close Facility in EQRS	Torrent Test User	00213830	Not Started
2	Remove Access from IPRO Learn	Torrent Test User	00213830	Not Started
3	Obtain Closure Letter	Torrent Test User	00213830	Not Started
4	48 hour first response	Torrent Test User	00213830	Not Started



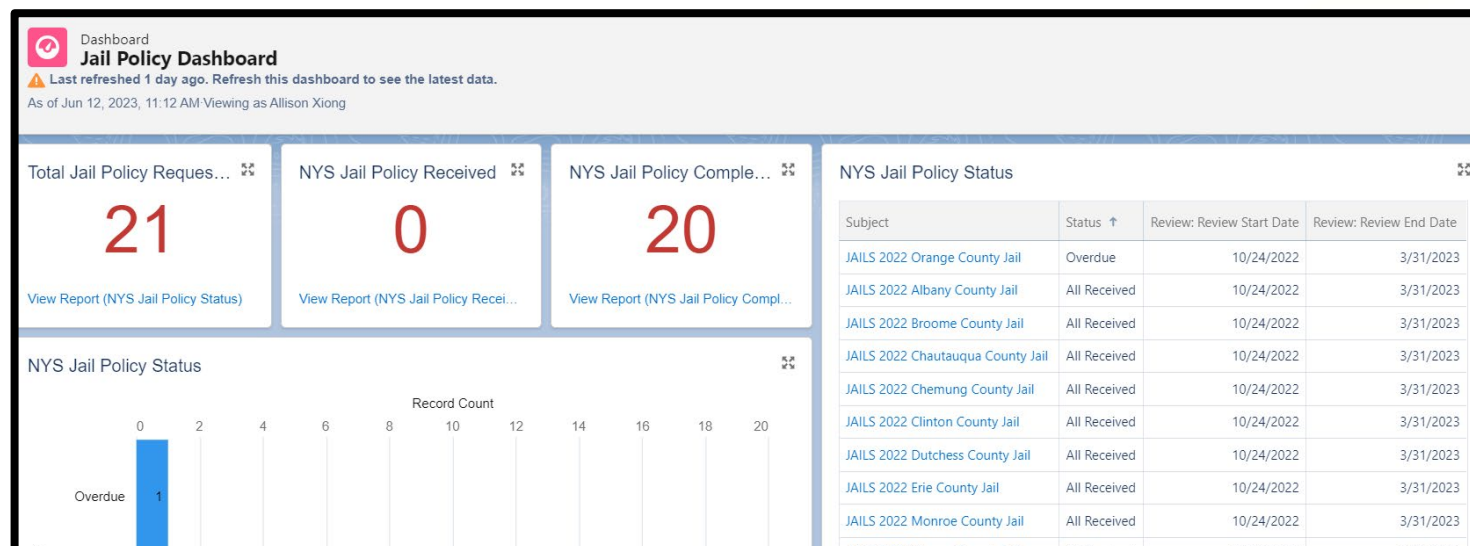
TIP: All templates should follow the naming convention of the department; ESRD, Task 3, 13th Scope etc. This naming convention will help the staff find the correct workplan to use quickly.

Part 6: Understanding Reports and Dashboards

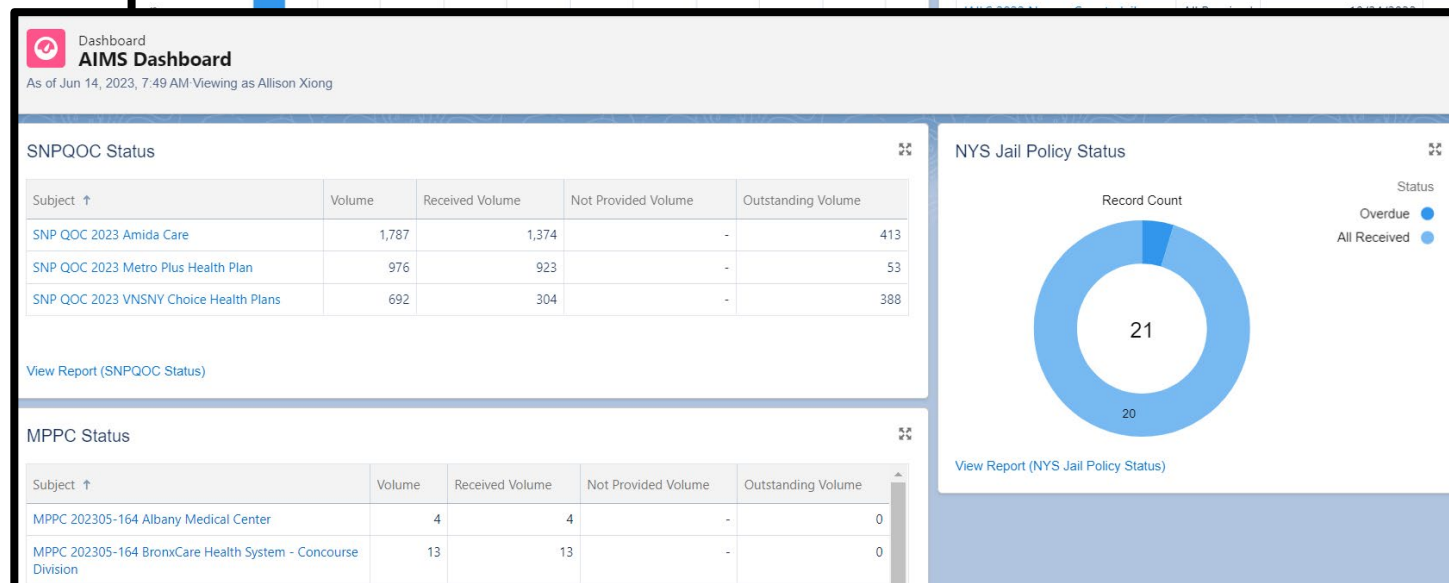
Reports and Dashboards



- Your business area Data Pros can apply complex filtering logic, summarize and group your data, perform calculations, and create sophisticated visualizations for data within Salesforce.



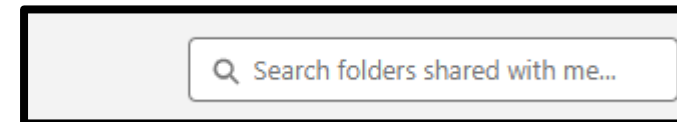
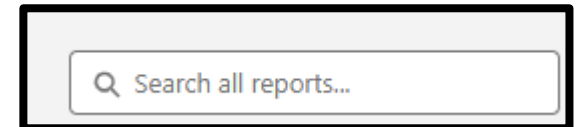
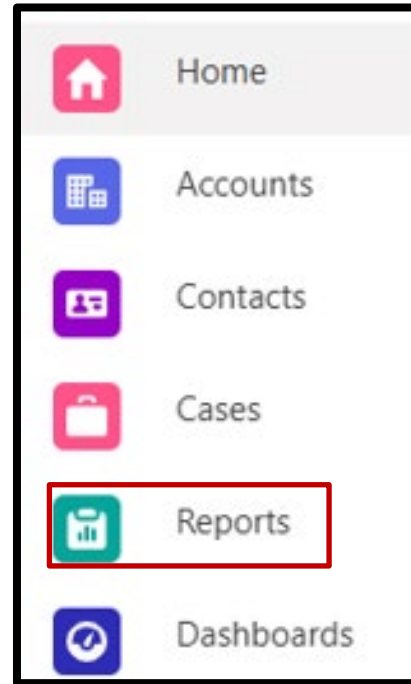
- For reports that require multiple data sources or to share directly with a Client, IPRO utilizes the Salesforce product Tableau.



Reports and Dashboards



- From the object menu, open the Reports object. Reports does not have a list view like other objects, instead it has a left-hand navigation that allows you to sort between Reports and Folders.
- To quickly find the reports you have available to you, use the folder search: Shared with Me.
- You will then be shown your department specific folder with all the reports you will need.
- If you don't see the folder you are looking for, you can use the search. You can search by folder name or select All Reports and search for a report name.

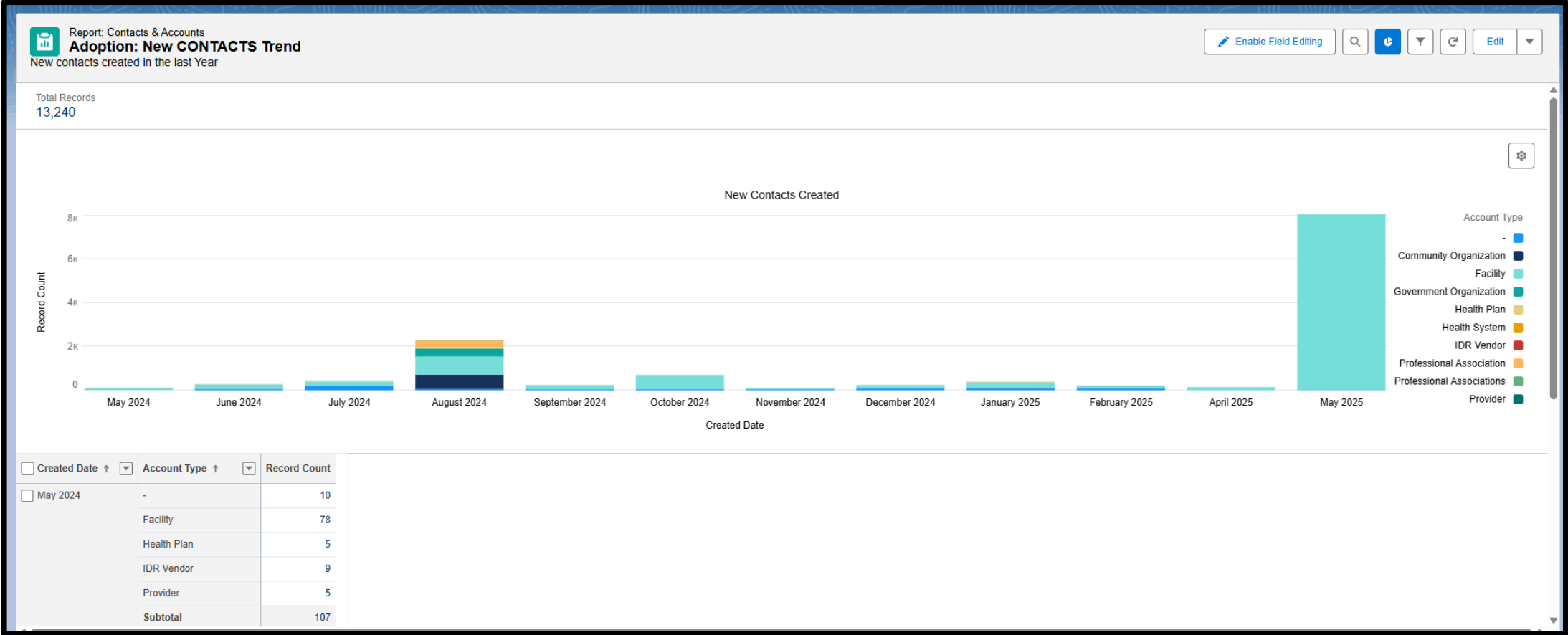


Reports and Dashboards



Reports can be used to identify productivity, provide cross sections of information, or monitor progression over time.

This report shows the number of contacts added per month over the last year, and groups them by the Account Type and Month.

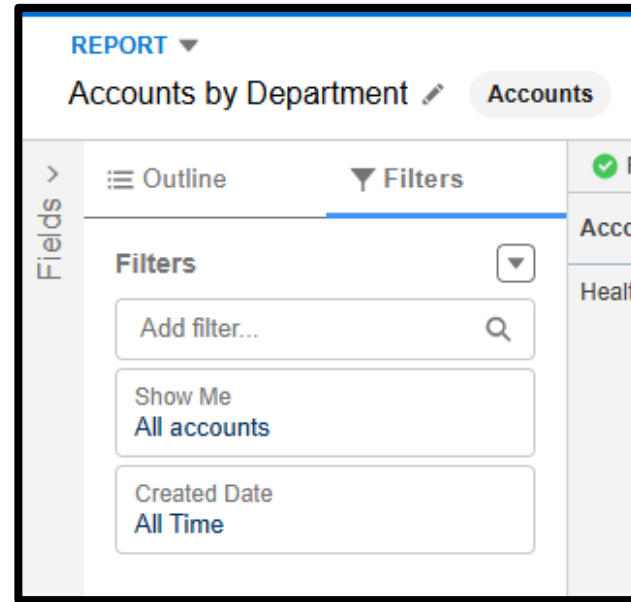


Reports and Dashboards

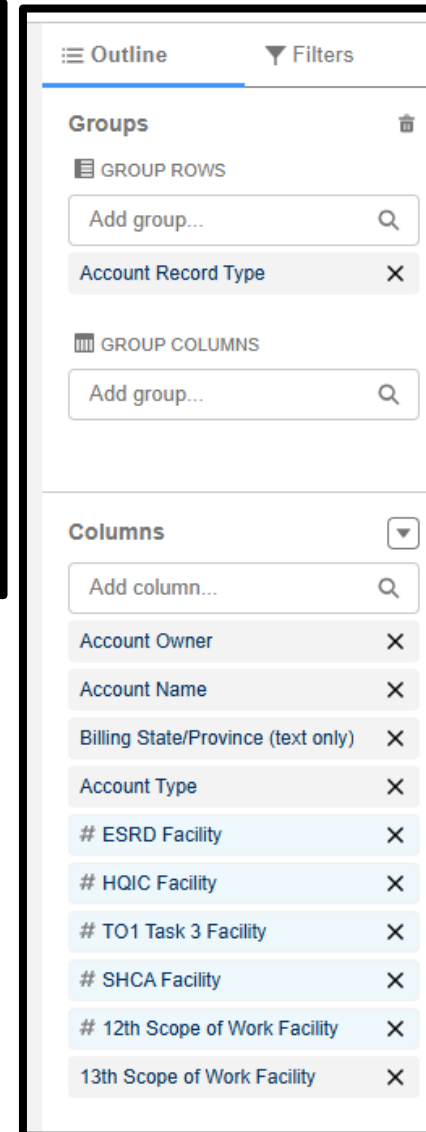


When requesting a new report, there are 3 things you need to consider:

1. What objects and record types are involved?
2. What are you trying to solve or see?
3. What fields would you like displayed or groupings you may need?



Example report



This example report is trying to determine which accounts are being used by each department. The criteria for the report is simple:

- All Account Records that were ever created
- Who owns the account, the account name, the state, the type of account, and finally a listing of all the possible departments
- To help display better, we would like it grouped by record type.

Report Accounts
Accounts by Department
A list of Accounts that identifies which departments are marked as working with the account.

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

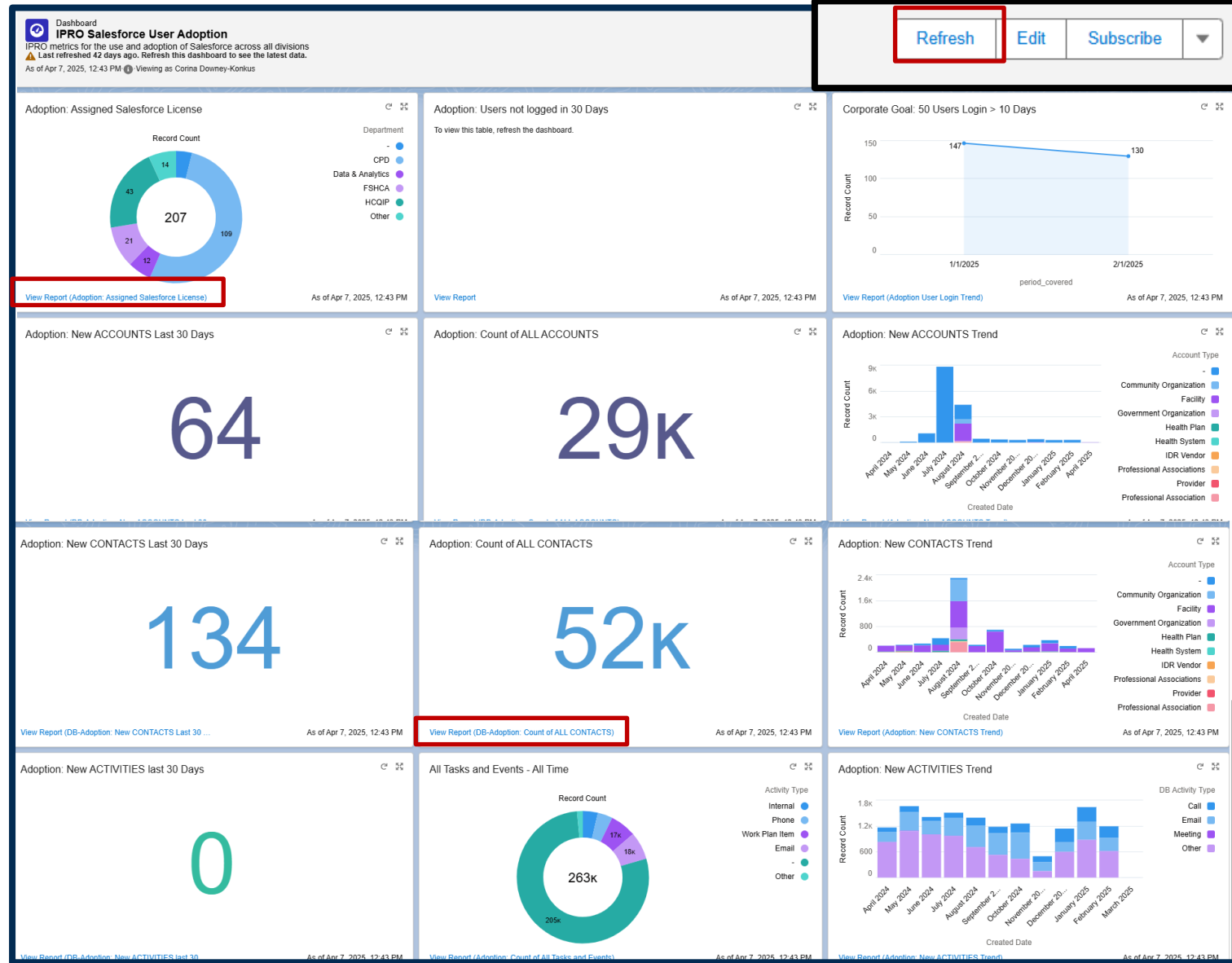
Total Records	Total ESRD Facility	Total HQIC Facility	Total TO1 Task 3 Facility	Total SHCA Facility	Total 12th Scope of Work Facility
32,659	1,993	323	8,374	1,983	2,718

Account Record Type	Account Owner	Account Name	Billing State/Pr...	Account Type	ESRD Facility	HQIC Facility	TO1 Task 3 Facility	SHCA Facility	12th Scope of Work Facility	13th Scope of Work Facility
(-1)	Dataflow API	Kaiser Permanente	-	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtotal					0	0	0	0	0	0
Facility (15011)										
	Kelly Arthur	St. FRANCIS Hospital	DE	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Kelly Arthur	Bayhealth Hospital, Kent Campus	DE	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	WHITESBURG ARH HOSPITAL	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	Owensboro Health Muhlenberg Community Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	HIGHLANDS REGIONAL MEDICAL CENTER	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	CHI Saint Joseph Health Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	CHI Saint Joseph Health London	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	UofL Health - Shelbyville Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	St. CLAIRE Regional Medical Center	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	MIDDLESBORO APPALACHIAN REGIONAL HEALTHCARE HOSPIT	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	PINEVILLE COMMUNITY HEALTH CENTER, INC	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	Flaget Memorial Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	MARSHALL COUNTY HOSPITAL	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	MURRAY - CALLOWAY County Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	HAZARD ARH REGIONAL MEDICAL CENTER	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	UofL Health - Jewish Hospital	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Deborah Campbell	AdventHealth Manchester	KY	Facility	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

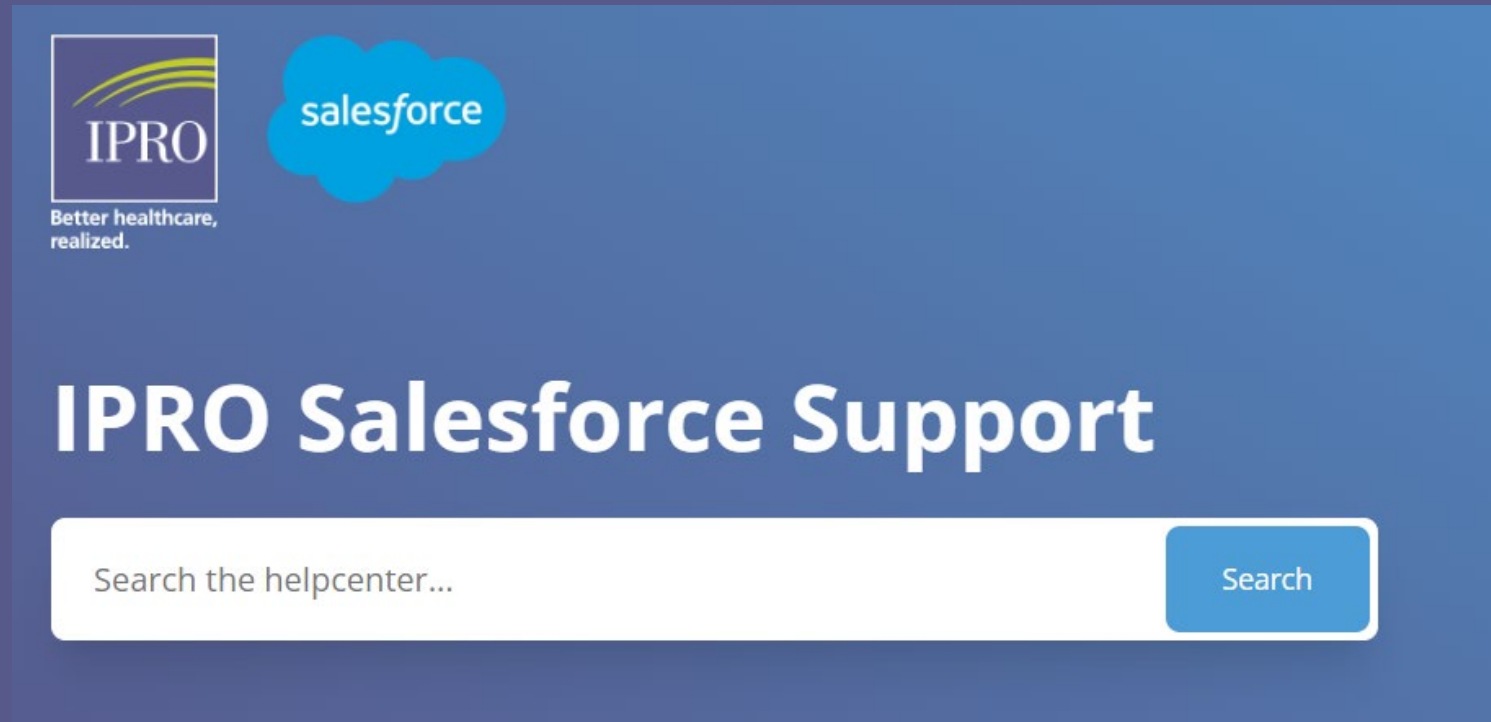
Reports and Dashboards



- A dashboard is a visual representation of multiple reports in one spot.
- Your department may have multiple types of dashboards for Executive Leadership, Management, or Staff.
- Each dashboard component is made up of a single report. You can drill into the report by clicking the blue link at the bottom of the component.
- For the most current updated information, use the Refresh button at the top of the page.



Questions?



The screenshot shows the top section of the IPRO Salesforce Support page. On the left, there is the IPRO logo with the tagline "Better healthcare, realized." and the Salesforce logo. The main heading "IPRO Salesforce Support" is centered in large white text. Below the heading is a search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button.



Better healthcare,
realized.

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<http://ipro.org>

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