



Salesforce: ESRD Data Management/Manager Training

05/12/2025

What will be covered in this training?



- **Part 1: Creating a New Account and Contact**
- **Part 2: Facility Demographics from EQRS**
- **Part 3: Creating Workplan Templates**
- **Part 4: Creating and Managing Facility Cases**
- **Part 5: Accessing and Modifying Existing Reports**
- **Part 6: Salesforce Reports**

This training will help you complete the following actions:

- Searching for an account
- Creating a New Account and Contact
- Creating and using Workplan Templates
- Viewing ESRD Demographics Data on the Account Record
- Creating and Managing a New Facility Case
- Creating and Managing a Permanent or Temporary Facility Closure Case
- Assigning Facility Closure Tasks that request Network assistance to Patient Services
- Collecting and storing Facility Letters using Box
- Adapting Reports

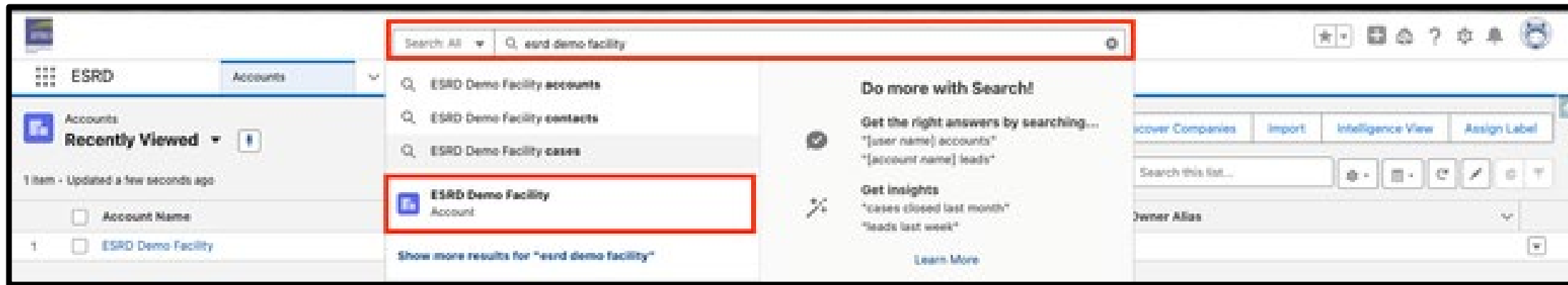


Part 1: Creating a New Account and Contact

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.



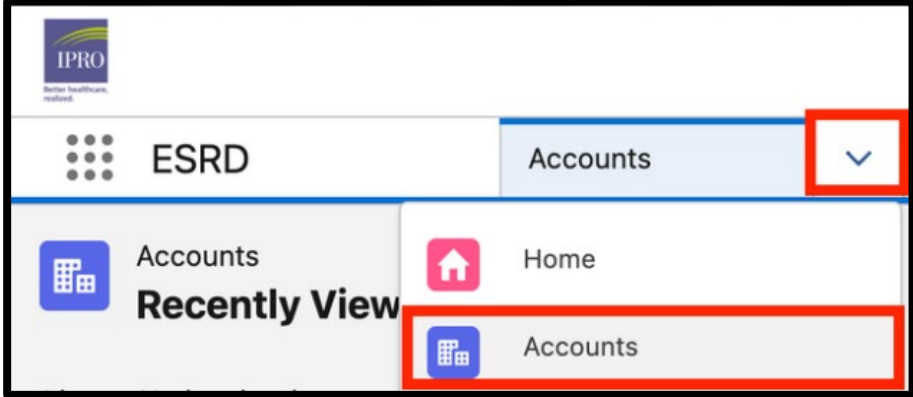
If your facility already exists, view the facility details important to your business area.

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

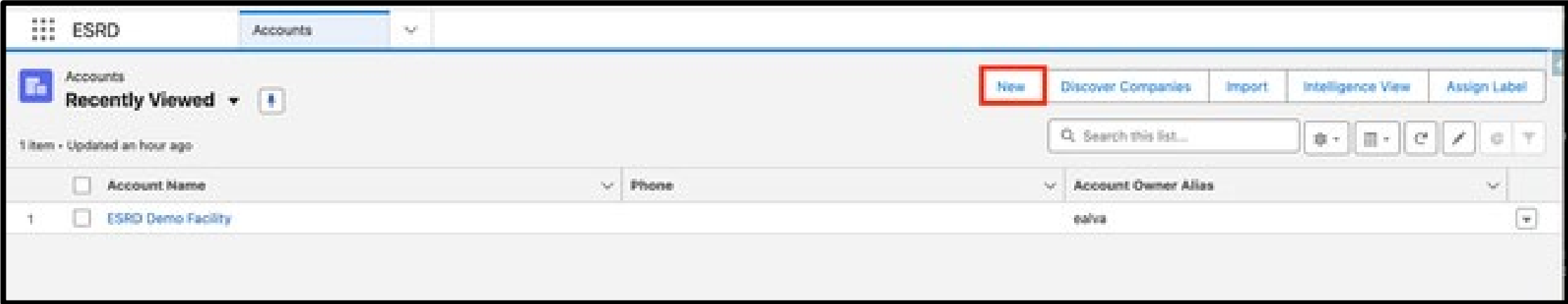
Creating a New Facility or Account



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"> Hospital Dialysis Center Kidney Transplant Center Home Health Agency Hospice Center Laboratory Nursing Home Aging Resource Center Disability Resource Center Adult Day Care Transportation Service 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.

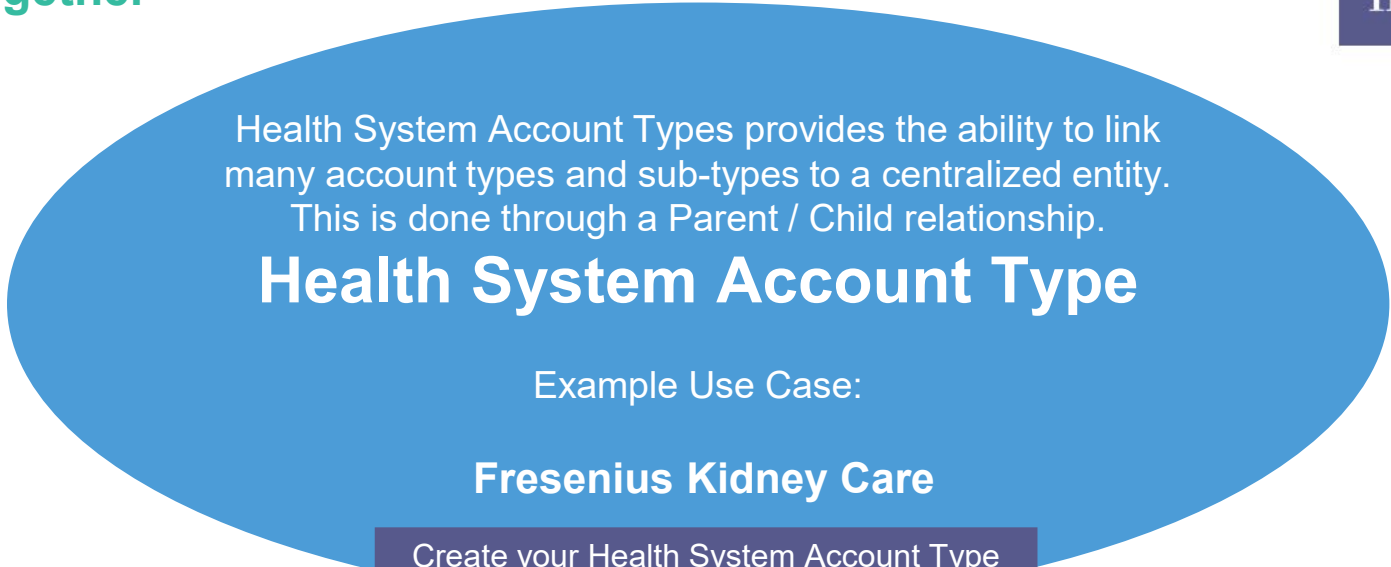
Creating Health Systems or Parent Accounts

Parent Accounts – Linking Accounts together



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)



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



TIP: A parent account will likely already be created by your Data Pro and available to select when creating a new facility

Creating New ESRD Facility



1. Enter the *Account Name
2. Enter the Also Known As Name (sometimes called Doing Business As Name)
3. Search for a Parent Account or Health System who owns the facility; example: Davita; (if Facility is Independently owned leave Parent Account blank and select the Independent (Checkbox) under the ESRD Facility Demographics section)
4. *Account Type should be Facility
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>

The screenshot shows the 'Account Information' form with the following fields and values:

- Account Name:** ESRD Test Facility 2
- Also Known As:** (empty)
- Facility Name History:** (empty)
- Parent Account:** Search Accounts... (with search icon)
- Account Type:** Facility
- Facility Type:** Dialysis Center
- Designation:** Available: Accountable Care ...; Chosen: (empty)
- Account Source:** --None--
- Phone:** (empty)
- Fax:** (empty)
- Website:** (empty)
- Related Contracts:** Available: NQIC TO3, NQIC TO1, NQIC TAQIL; Chosen: (empty)
- Total Licensed Beds:** (empty)
- Active:**

At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'.

Creating New ESRD Facility



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 ESRD Facility



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	Facility Status
Certified Services	<input type="text" value="Pending Certification"/>
Network	<input type="checkbox"/> Independent
Auth_BSO_desc	Facility ID
	Facility Certified Date

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.

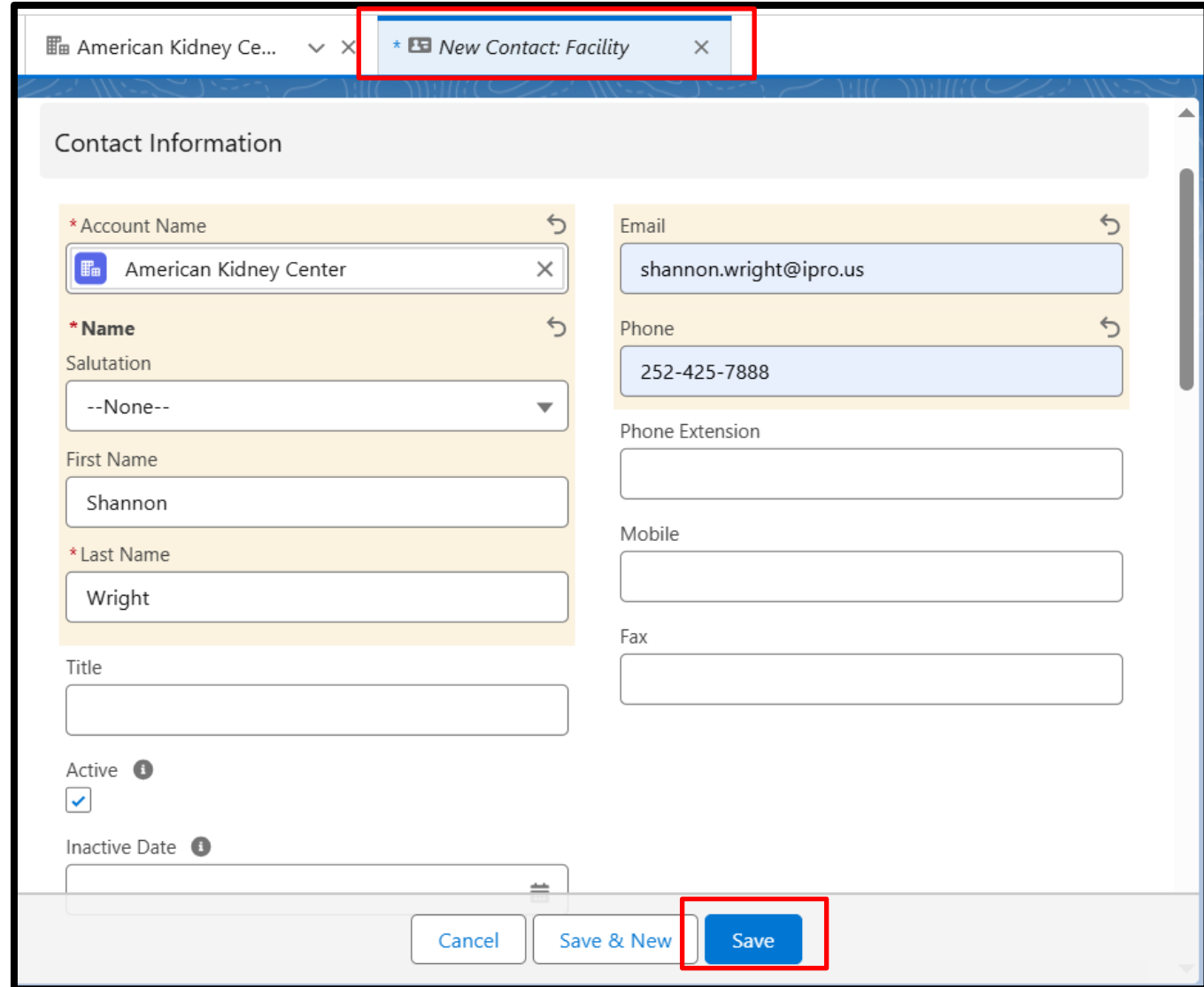
- Before adding a new Contact, use the search to see if they already exist. If they do not, create new
- From the dropdown, Select Contacts
- Select New to create a new Contact
- **Note:** A separate tab is created, the American Kidney Center Case Tab and Account tab are still available

The screenshot shows the 'Contacts' list view. The 'New' button is highlighted. The table shows 14 items 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

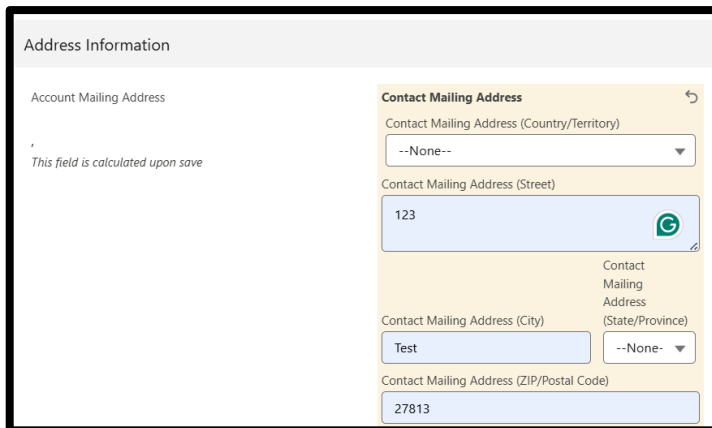
Phone ↶
252-425-7888

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

This field is calculated upon save

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	

Part 2: Facility Demographics from EQRS

Facility Demographic information from EQRS



Once a facility is certified, Facilities Demographics from EQRS will be populated at the Account level

- From the Account page, click on the related tab
- Under the EQRS Facility Demographics section, click the hyperlink to view the details of the record

ESRD Accounts American Kidney Ce...
American Kidne... EFD-0064 ...
Account **American Kidney Center** + Follow
Also Known As: American Kidney Center of Madison, LLC
Account Type: Facility
Phone: 812-747-9472
Account Owner: Duana Davis
Details **Related** CMS COVID-19 Data Files
Account Information
Account Name: American Kidney Center
Account Source

Details **Related** CMS COVID-19 Data Files
EQRS Facility Demographics (1) 1 item • Updated 2 minutes ago

	<input type="checkbox"/> EQRS Facility Demograp...	Facility ID	ID CCN	Facility Certified Date
1	<input type="checkbox"/> EFD-0064	2100019208	152693	5/25/2018

Facility Demographic information from EQRS



▼ Information

<p>EQRS Facility Demographics Name EFD-0064</p> <hr/> <p>Facility American Kidney Center</p> <hr/> <p>Facility ID 2100019208 ✎</p> <hr/> <p>Parent Account Independent Dialysis Foundation (IDF)</p> <hr/> <p>Also Known As American Kidney Center of Madison, LLC</p> <hr/> <p>Facility Type Dialysis Center</p>	<p>Phone 812-747-9472</p> <hr/> <p>Fax 812-747-9490</p> <hr/> <p>Facility Certified Date 5/25/2018</p> <hr/> <p>ID CCN 152693</p> <hr/> <p>Dialysis EQRS Waitlist Count 5</p> <hr/> <p>Certified Services ICHD/HHD/PD</p> <hr/> <p>Facility Status Certified</p> <hr/> <p>Services in Use</p>
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▼ Facility Schedule

Monday Schedule 05:30-17:00	Monday Shift 2
Tuesday Schedule 05:30-12:00	Tuesday Shift 1
Wednesday Schedule 05:30-17:00	Wednesday Shift 2
Thursday Schedule 05:30-12:00	Thursday Shift 1
Friday Schedule 05:30-17:00	Friday Shift 2
Saturday Schedule 05:30-12:00	Saturday Shift 1
Sunday Schedule	Sunday Shift

▼ EQRS Additional Information

NHSN ID 56,983	ADI Label
Certified Station Count 15	Total Patient Census 51
Home Hemo Patient Census 1	CAPD Patient Census 11
InCenter Hemo Patient Census 35	CCPD Patient Census 4
Transplant EQRS Waitlist Count 0	NewESRD Pt Count 15
Dialysis Waitlist Less66 5	ECHO
Transplant Waitlist Less66 0	Using Home Using Home
SRTR Code	Nursing Home
Isolation Station	LTC Facility Hemo Patient Census 0
PFR Count	Transplanted Patients 0

- Information is prepopulated from EQRS on Thursdays
- Includes Facility Details, Schedule and EQRS information.
- From the Account page, click on the related tab
- Under the EQRS Facility Demographics section, click the hyperlink to view the details of the record

ESRD Facility Demographics History



- Key fields identified to track history is available on the right of the screen for the most recent changes.
- Click the view all button to see a list of all history changes including: the Date/Time of Change, Field, Original Value and New Value

EQRS Facility Demographic History (3+) ▼

Date: 4/4/2025, 1:03 PM
Field: CAPD Patient Census
User: [Duana Davis](#)
Original Value:
New Value: 11

Date: 4/4/2025, 1:03 PM
Field: CCPD Patient Census
User: [Duana Davis](#)
Original Value:
New Value: 4

Date: 4/4/2025, 1:03 PM
Field: Certified Station Count
User: [Duana Davis](#)
Original Value:

EQRS Facility Demographics > EFD-0064
EQRS Facility Demographic History

16 items • Sorted by Date • Updated 2 minutes ago



	Date	Field	User	Original Va...	New Value
1	4/4/2025, 1:03 PM	CAPD Patient Census	Duana Davis		11
2	4/4/2025, 1:03 PM	CCPD Patient Census	Duana Davis		4
3	4/4/2025, 1:03 PM	Certified Station Count	Duana Davis		15
4	4/4/2025, 1:03 PM	Friday Schedule	Duana Davis		05:30-17:00

Part 3:

Creating Workplan Templates

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

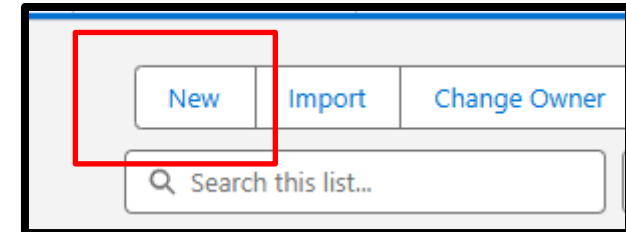
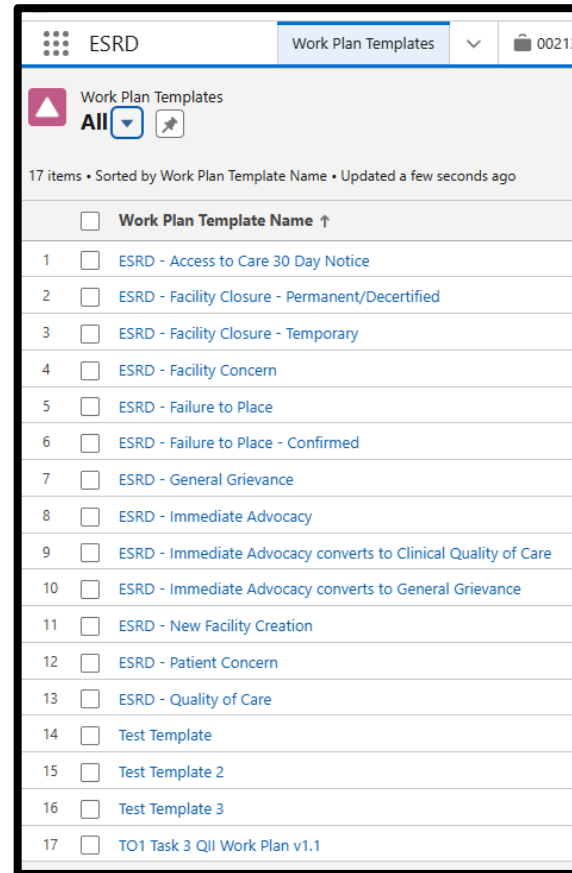
4 items • Sorted by Due Date • Updated a few seconds ago

	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

Workplans: Creating a Task Series



- To create a new Workplan Template, navigate to Work Plan Templates in the object menu
- Before creating a new template, change your List View to All and confirm the template does not already exist
- Select the New to create a new template



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.

Workplans: Creating a Task Series



- Give the template a name, status (available or closed), and select your IPRO Contract
- While Start Date and End Date are not required, it is helpful to include if your template has a firm deadline
- You need to mark your template as Published before it will be viewable to Users. You may keep it unpublished while it is being designed, but you will need to go back and publish it when complete

A screenshot of a web application form titled "New Work Plan Template". The form is divided into several sections. At the top right, there is a legend: "* = Required Information". The "Information" section contains the following fields:

- "* Work Plan Template Name": A text input field containing "13th SOW - Technical Assistance".
- "Status": A dropdown menu with "Available" selected.
- "Start Date": An empty date input field with a calendar icon.
- "End Date": An empty date input field with a calendar icon.
- "IPRO Contract": A dropdown menu with "QINQIO" selected.
- "Published": A checkbox, which is currently unchecked and is highlighted with a red rectangular box.
- "Owner": A field showing a user profile icon and the name "Corina Downey-Konkus".

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

Workplans: Creating a Task Series



- Once the workplan template shell is created, you need to go in and add the Activities that should be grouped in this template
- Add a Work Plan Item Name, Order Number (order of completion), mark Required if needed, determine if you skip non-workdays, and provide how many days until the item is due and the Priority
- Select Save & New to add additional tasks, or Save if the template is complete

Work Plan Template
13th SOW - Technical Assistance

Published IPRO Contract QINQIO Status Available

Details Related

Work Plan Template Name: 13th SOW - Technical Assistance
Status: Available
Start Date:
End Date:
Description:
Created By: Corina Downey-Konkus, 5/22/2025, 12:25 PM

IPRO Contract: QINQIO
Published:
Owner:
Edit Delete Clone

Work Plan Items (0) New

New Work Plan Item

* = Required Information

Information

* Work Plan Item Name: Informational Letter

* Work Plan Template: 13th SOW - Technical Assistance

Order Number: 1

Required:

Comments:

Skip Non-Work Days:

* Days Until Due: 1

* Priority: Normal

Cancel Save & New Save

Workplans: Creating a Task Series



- When your workplan template is complete, verify you have marked it as Published
- If you have forgotten a task and need to add it to the workplan, you can create additional or add updates to existing items

The screenshot displays the '13th SOW - Technical Assistance' work plan template. The 'Published' checkbox is checked. The 'Work Plan Items' section shows two items: 'Informational Letter' and 'Follow up Call'. The 'Edit' button for the 'Follow up Call' item is highlighted with a red box.

Published	IPRO Contract	Status
<input checked="" type="checkbox"/>	QINQIO	Available

Work Plan Template Name	IPRO Contract
13th SOW - Technical Assistance	QINQIO
Status	Published
Available	<input checked="" type="checkbox"/>
Start Date	Owner
End Date	Corina Downey-Konkus
Description	
Created By	Last Modified By
Corina Downey-Konkus, 5/22/2025, 12:25 PM	Corina Downey-Konkus, 5/22/2025, 12:33 PM

Work Plan Items (1)	
Informational Letter	
Days Until Due:	1
Created Date:	5/22/2025, 12:32 PM

Work Plan Items (2)	
Informational Letter	
Days Until Due:	1
Created Date:	5/22/2025, 12:32 PM
Follow up Call	
Days Until Due:	3
Created Date:	5/22/2025, 12:33 PM



Changes made to published Workplan Templates will not automatically update workplans already assigned to cases. Tasks will need to be manually created/deleted.

Workplans: Creating a Task Series



- If you did not put in an end date, be sure to unpublish your Workplan Template when it should no longer be available to your team to add to Cases
- If you added an End Date to the template, it will automatically unpublish and no longer be available for new case assignment when the date has past
- All workplans will still be available for completion if they were added to a case before the workplan template expired

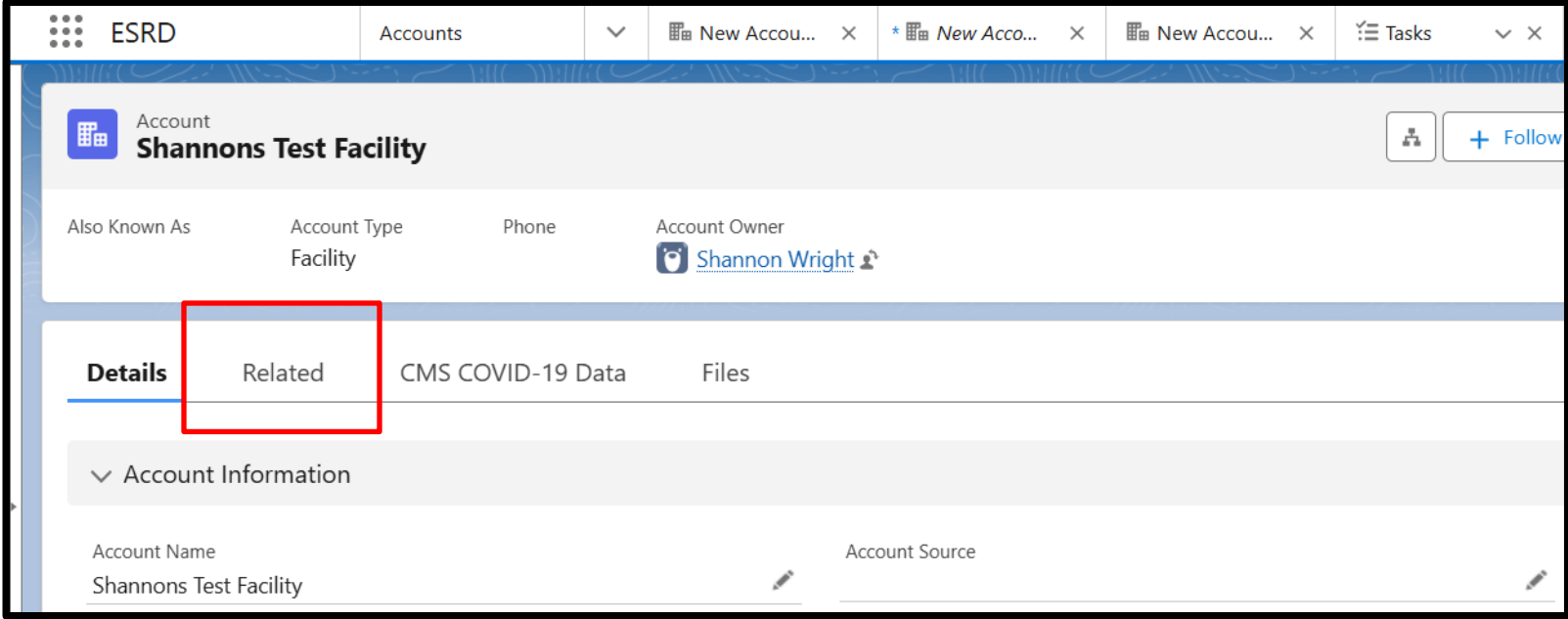
The screenshot shows the 'Work Plan Template' details for '13th SOW - Technical Assistance'. At the top, there is a summary row with a 'Published' checkbox (unchecked), 'IPRO Contract' 'QINQIO', and 'Status' 'Available'. Below this is a 'Details' tab. The details are organized into two columns. The left column includes: 'Work Plan Template Name' (13th SOW - Technical Assistance), 'Status' (Available), 'Start Date' (5/1/2025), 'End Date' (5/21/2025), and 'Description'. The right column includes: 'IPRO Contract' (QINQIO), 'Published' (checkbox, highlighted with a red box), 'Owner' (Corina Downey-Konkus), and 'Last Modified By' (Corina Downey-Konkus, 5/22/2025, 12:57 PM). At the bottom, 'Created By' is also listed as Corina Downey-Konkus, 5/22/2025, 12:25 PM.

Part 4: Creating and Managing Facility Cases

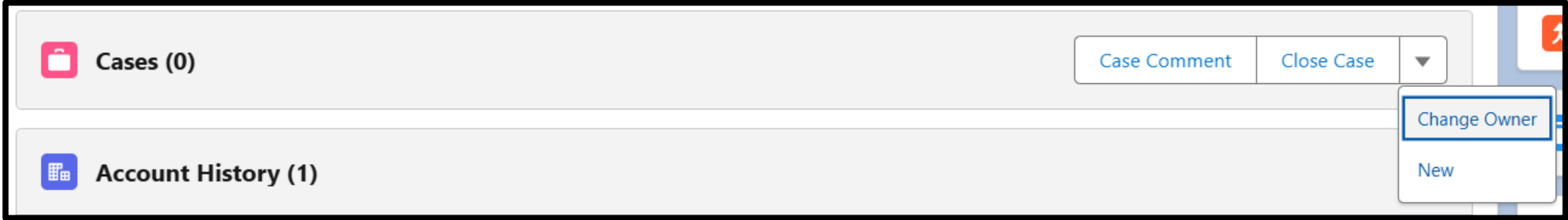
Create a New Facility Case



From the Facility Record Page, click the Related Tab



From the Cases section, select the drop down and click New



Create a New Facility Case



Select ESRD - New Facility Record Type and click Next.

New Case

- 13th Scope of Work Engagement
Tracks the engagement and enrollment process for the 13th Scope of Work
- CMS IDR
Used for CMS IDR process
- ESRD - New Facility
ESRD - New Facility RT
- ESRD - Patient Services
PS Concerns: Access to Care, General Grievance, Immediate Advocacy, Quality Improvement, Facility Concern, Patient Concern
- FQS
To replace QINQIO TO1 Task 3 Cases w/ the Contract Renewal
- HQIC
For the HQIC department

Create a New Facility Case



New Case: ESRD - New Facility

* = Required Information

Case Information

Case Number

Case Owner
Shannon Wright

* Account Name
Shannons Test Facility

Contact Name
Search Contacts...

Case Details

* Status
Pending Certification

Priority
Low

[View all dependencies](#)

- Contact Name: Search for an existing Contact or add a new contact
- Set the status to Pending Certification

- Populate the Subject Line, Description and Internal Comments as needed
- Click Save

Case List Details

* Subject

Description

Internal Comments

Managing a New Facility Case



The onboarding status of a facility will be displayed at the top of the Case Details screen.

The screenshot shows the top section of a Case Details screen. On the left, there is a case icon and the text "Case 00213823". Below this, a table lists details: Subject (Shannon Test Facility), Status (Pending Certification), and Account Name (Shannons Test Facility). In the top right corner, there are two buttons: "Create Work Plan" and "Edit". Below the table, a progress bar shows four stages: "Pending Certification" (highlighted in blue), "Certified Needs Onboarding", "Onboarded", and "Closed". To the right of the progress bar is a blue button with a checkmark and the text "Mark Status as Complete".

- From your Case record click the “Create Work Plan” Button located in the top right corner
- Search for Work Plan Template: ESRD – New Facility Creation
- Enter Status: Not Started
- Create Start and End Date
- Assign an Owner

The screenshot shows the "Create Work Plan" form. It has a title "Create Work Plan" at the top. Below the title, there is a search field for "Work Plan Template" with the text "ESRD - New Facility Creation" entered. Below the search field, there is a dropdown menu with the selected option "ESRD - New Facility Creation". Below the dropdown, there is a red error message "Complete this field." followed by a red asterisk. Below the error message, there are three input fields: "Start Date", "End Date", and "Case". The "Case" field has the value "00213823". Below the "Case" field, there is an "Owner" field with the text "Select a User...". At the bottom of the form, there is a "Next" button, a progress indicator, and a "Cancel" button.

Adding Workplan Tasks



- All tasks from the workplan are checked.
- You can unselect a task if it is not needed
- Click Save
- Refresh your screen to see the new workplan tasks populated in the Case Activity section

Select Applicable Tasks

<input checked="" type="checkbox"/>	Name	Required	Priority	Days Until D...	Comments	Skip No
<input checked="" type="checkbox"/>	1. Add Facility to EQRS	<input checked="" type="checkbox"/>	Normal	30		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2. Send Facility EQRS Instructio...	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	3. Follow up on CMS Certificati...	<input checked="" type="checkbox"/>	Normal	30		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4. CMS Certification Received		Normal	100		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	5. Update CCN in EQRS	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	6. Create Caspio Account	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	7. Create IPRO Learn	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	8. Add Facility to RedCap	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	9. Send Welcome and Onboar...	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	10. Update ESRD Team of New ...	<input checked="" type="checkbox"/>	Normal	30		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	11. Confirm Caspio has update...	<input checked="" type="checkbox"/>	Normal	10		<input checked="" type="checkbox"/>

Previous Save Cancel

Updating workplan tasks



- Work plan tasks can be marked as complete by checking the box to the left of the task.
- From the pop up, choose if the activity was completed or cancelled.
- Task will update with a strike through when completed or cancelled.

The screenshot displays the ESRD system interface for a case titled 'Shannon Test Facility'. The status is 'Pending Certification'. A progress bar shows stages: Pending Certification, Certified Needs Onboarding, Onboarded, and Closed. A 'Mark Status as Complete' button is visible. Below the progress bar are 'Related List Quick Links' for Case Team, Files, Open Activities, Activity History, Case Comments, Case History, and Work Plans. The 'Details' tab is active, showing 'Case Information' with fields for Case Number and Case Owner. An 'Activity' panel on the right allows adding new tasks, logging calls, or sending emails. A list of 'Upcoming & Overdue' tasks is shown, including '5. Update CCN in EQRS' and '2. Send Facility EQRS Instructions'. A 'Choose Status' modal is overlaid on the tasks, with 'Completed' selected.

The 'Choose Status' modal is a white box with a close button (X) in the top right corner. It contains the text 'Select a Status' followed by two radio button options: 'Completed' (which is selected) and 'Cancelled'. At the bottom right of the modal are 'Cancel' and 'Save' buttons.

This close-up shows the 'Upcoming & Overdue' section of the task list. Two tasks are visible: '5. Update CCN in EQRS' and '2. Send Facility EQRS Instructions'. Both tasks have a green checkmark in a box to their left, indicating they are marked as complete. The text 'You have an upcoming task' is displayed below each task.

Permanent and Temporary Non Emergency Closure Facility Submission Form



- Facilities will complete an IPRO data collection form from a link stored on the IPRO ESRD Network website
- Upon completion the submitter will receive a message that the Network will process the information and follow up

The screenshot shows the IPRO ESRD Network Program submission form. At the top left is the IPRO logo with the tagline 'Better healthcare, realized.' Below the logo is a dark blue navigation bar with the word 'Home' in white. The main heading is 'IPRO ESRD Network Program: Permanent and Temporary Non-Emergency Closures'. Below the heading is a paragraph: 'Please complete the form below for your facility's operational status (Open/Closed).'. This is followed by four bullet points: 'Complete the form for all reportable events including staff shortages related to non-emergency closures', 'Submit an initial report of the event and then submit a follow-up report once the event/ issue has concluded.', 'Survey completion is dependent on all fields as marked by * must provide value.', and 'Please do not include any PHI in your responses to this survey.'. Below the instructions are two sections: 'FACILITY INFORMATION' and 'FACILITY OPERATIONAL STATUS'. The 'FACILITY INFORMATION' section has a dropdown menu with '--None--' selected. The 'FACILITY OPERATIONAL STATUS' section has two radio button options: 'Facility Closure: Permanent' and 'Facility Closure: Temporary'. On the right side of the form, there is a large white box with a black border containing the text: 'Thank you for reporting the event to the Network. Someone will process this report and get back to you as soon as possible.' Below this text is the label 'ESRD Network'.

Permanent and Temporary Non Emergency Closure Case Creation Queue



A screenshot of the ESRD Cases application interface. The top navigation bar shows 'ESRD' and 'Cases'. Below this, there's a 'Recently Viewed' section with a search bar. The search bar is open, showing a dropdown menu with several options. Two options are highlighted with a red box: 'ESRD Permanent Facility Closures Queue' and 'ESRD Temporary Facility Closure Queue'. The background shows a list of cases with checkboxes and some text.

- Submission of a closure form, a case will be created and assigned to a queue
- Select either the ESRD Permanent Facility Closure Queue or the ESRD Temporary Facility Closure Queue to see the unassigned list of cases

Permanent and Temporary Non-Emergency Closure Case Creation Queue



Newly Submitted Cases Appear in a queue, check the box and click accept to assign the case to yourself

Cases
ESRD Permanent Facility Closures Queue ▾ ↗

2 items • Sorted by Case Number • Updated 2 minutes ago

Search this list...

	C... ↑ ▾	Contact ... ↑ ▾	Subject	Status ▾	Priority ▾	Date/Time Open... ▾	Case Owner Alias	
1	<input type="checkbox"/>	00213835	Shannon Wright	5/30/2025 - 340030 - DUKE UNIVERSITY MEDICAL CENTER TRANSPLANT PROGRAM	New	Normal	5/12/2025, 12:05 PM	ESRD Permanent Facility Closures Queue
2	<input type="checkbox"/>	00213835		5/16/2025 - 332514 - Atlantic DMS - Central Park Fifth Ave	Closed	Normal	5/12/2025, 12:07 PM	ESRD Permanent Facility Closures Queue

Once a case has been accepted it will disappear from the Queue

Cases
ESRD Permanent Facility Closures Queue ▾ ↗

1 item • Sorted by Case Number • Updated a few seconds ago

Search this list...

	Case ... ↑ ▾	C... ▾	Subject	Stat... ▾	Prior... ▾	Date/Time Opened	Case Owner Alias
1	<input type="checkbox"/>	00213836	5/16/2025 - 332514 - Atlantic DMS - Central Park Fifth Ave	Closed	Normal	5/12/2025, 12:07 PM	ESRD Permanent Facility Closures Queue

The case can be seen in the My Open Cases view, click on the Case Number to go directly to the case details

Cases
My Open Cases ▾ ↗

16 items • Sorted by Date/Time Opened • Filtered by Closed • Updated a few seconds ago

Search this list...

	Case N... ▾	Contact Name	Subject	Status	Prio... ▾	Date/Time Opened ↓ ▾	Case... ▾	
1	<input type="checkbox"/>	00213835	Shannon Wright	5/30/2025 - 340030 - DUKE UNIVERSITY MEDICAL CENTER TRANSPLANT PROGRAM	New	Normal	5/12/2025, 12:05 PM	swrig
2	<input type="checkbox"/>	00213823	Shannon Test Facility	Pending Certification	Low	4/29/2025, 11:55 AM	swrig	

Case Status



The case status shows at the top of the case in the status navigational bar. As the case is worked, you can mark a status as complete, the last status of closed, reflects all activities have been completed and the case is closed which removes it from your open cases.

The screenshot displays the IPRO case management interface. At the top, there is a navigation bar with the 'ESRD' logo and a 'Cases' dropdown menu. Below this, several case tabs are visible, including 'DUKE UNIVERSITY M...', 'American Kidney Ce...', and 'EGLESTON CHILDR...'. The active case is 'DUKE UNIVERSIT...' with ID '0021383...'. The case details section shows the following information:

Type	Case Owner	Web Name	Web Email	Web Phone
Facility Closure, Permanent	Shannon Wright	Shannon Wright	swright@ipro.org	252-425-7996

Below the case details is a 'Related List Quick Links' section with the following links:

- Notes (0)
- Open Activities (4)
- Activity History (1)
- Case History (2)
- Work Plans (1)

The status navigational bar is highlighted with a red box and contains the following elements from left to right:

- A green arrow pointing right with a white checkmark.
- A blue arrow pointing right labeled 'Pending Closure Letter'.
- A grey arrow pointing right labeled 'Post Closure Activities'.
- A grey arrow pointing right labeled 'Closed'.
- A blue button labeled 'Mark Status as Complete' with a white checkmark.

At the bottom right of the interface, there is a link for 'Account Details'.

Facility Closure Case Details



Review the case details and consider the needs reported. If Assistance is requested, a task will be auto created as an upcoming task.

Case Details

Type	Facility Closure, Permanent	Case Owner	Shannon Wright
Closure Date	5/30/2025	Case Number	00213835
Assistance Needed	Yes	Status	New
Patients Notified	Yes	Subject	5/30/2025 - 340030 - DUKE UNIVERSITY MEDICAL CENTER TRANSPLANT PROGRAM
Placement Difficulties	Yes	Description	Testing Facility Closure Case Creation

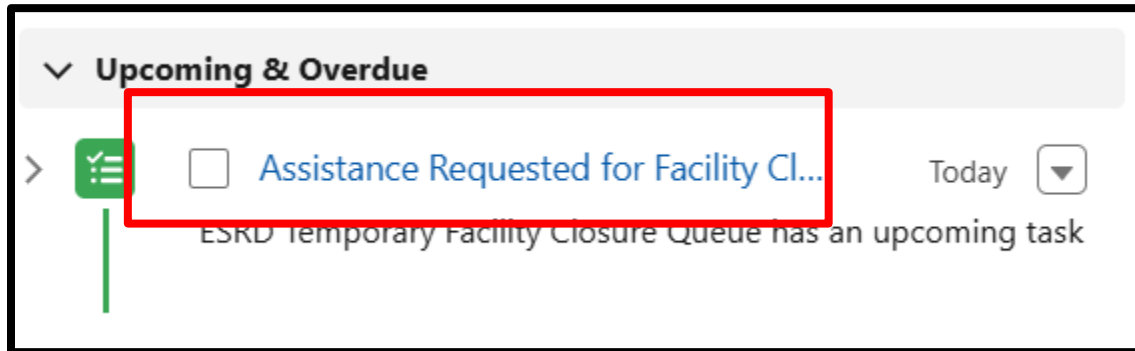
Case Summary

Facility Needs Summary ⓘ
Testing the alert to Patient Services

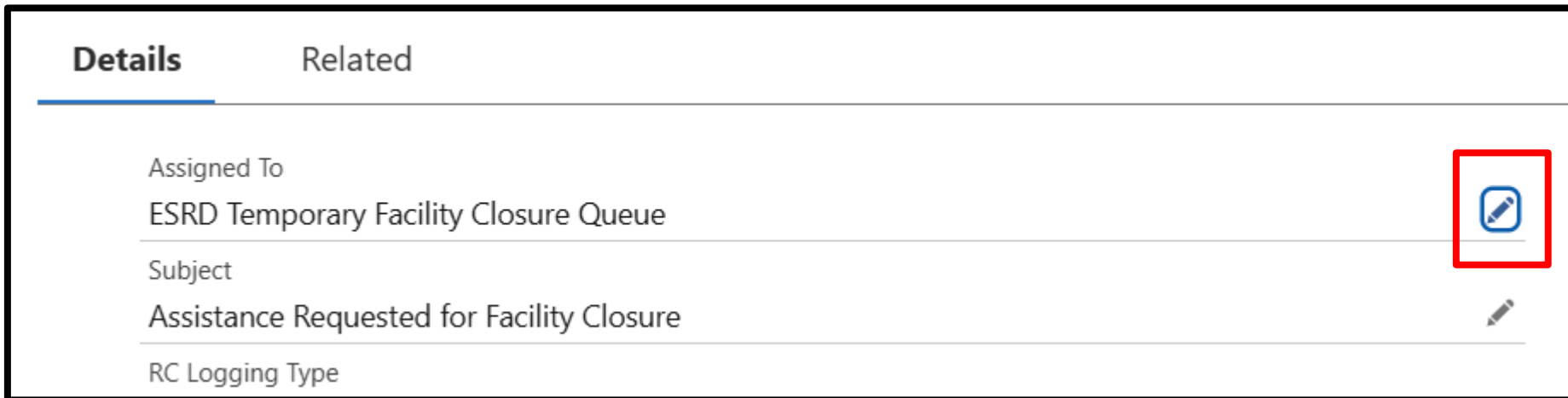
Upcoming & Overdue

- Assistance Requested for Facility Cl... Today
ESRD Temporary Facility Closure Queue has an upcoming task

Re-Assigning Assistance Requested for Facility Closure Tasks



Click on the Assistance Requested for Facility Closure Tasks



Change the Assigned To field to the appropriate Patient Service staff member to support the facility.

The task will now appear on their My Task List view

Assigning a Workplan



ESRD | Cases | Shannon Wright | Co... | American Kidney Ce... | DUKE UNIVERSITY M... | EFD-0064 | EQRS Fac... | 00213835 | Case

Case **00213835**

Create Work Plan | Create Corrective Action Plan | External Box Folder Creation | Edit

Type	Case Owner	Web Name	Web Email	Web Phone
Facility Closure, Permanent	Shannon Wright	Shannon Wright	swright@ipro.org	252-425-7996

Create Work Plan

*Work Plan Template

ESRD

- ESRD - Immediate Advocacy converts to Clinical Quality of Care
- ESRD - Quality of Care
- ESRD - Access to Care 30 Day Notice
- ESRD - Failure to Place
- ESRD - Failure to Place - Confirmed
- ESRD - Patient Concern
- ESRD - Facility Concern
- ESRD - Facility Closure - Permanent/Decertified**
- ESRD - Facility Closure - Temporary

Next | Cancel

- As with the New Facility Case, you can Create Work Plans
- Select the work plan based on the type of closure case:
 - ESRD – Facility Closure – Permanent / Decertified
 - ESRD – Facility Closure - Temporary

Assigning a Workplan



Create Work Plan

Work Plan Template Name
ESRD - Facility Closure - Permanent/Decertified

Description

* Work Plan Template
ESRD - Facility Closure - Permanent/Decertified

* Status
Not Started

* Start Date
May 12, 2025

End Date
May 30, 2025

* Case ⓘ
00213835

* Owner ⓘ
Shannon Wright

Next ○ ● Cancel

Populate the Workplan

- Status = Not Started
- Start Date = Date of starting closure activities
- End Date = Date of Facility Closure
- Case – this field is auto-populated
- Owner = primary owner of the workplan

Assigning a Workplan



Select Applicable Tasks

<input checked="" type="checkbox"/> Item N... ▾	Name ▾	Required	Priority ▾	Days U... ▾
<input checked="" type="checkbox"/>	Remove Access from IPRO Lea...	✓	Normal	60
<input checked="" type="checkbox"/>	Obtain Closure Letter		Normal	30
<input checked="" type="checkbox"/>	Close Facility in EQRS	✓	Normal	60
<input checked="" type="checkbox"/>	48 hour first response	✓	Normal	2

Previous



Save

Activity

▼ Upcoming & Overdue

- > Close Facility in EQRS Jul 11 ▼
You have an upcoming task
- > Remove Access from IPRO Learn Jul 11 ▼
You have an upcoming task
- > Obtain Closure Letter Jun 11 ▼
You have an upcoming task
- > 48 hour first response May 14 ▼
You have an upcoming task
- > Assistance Requested for Facility Cl... Today ▼
ESRD Permanent Facility Closures Queue has an upcoming task

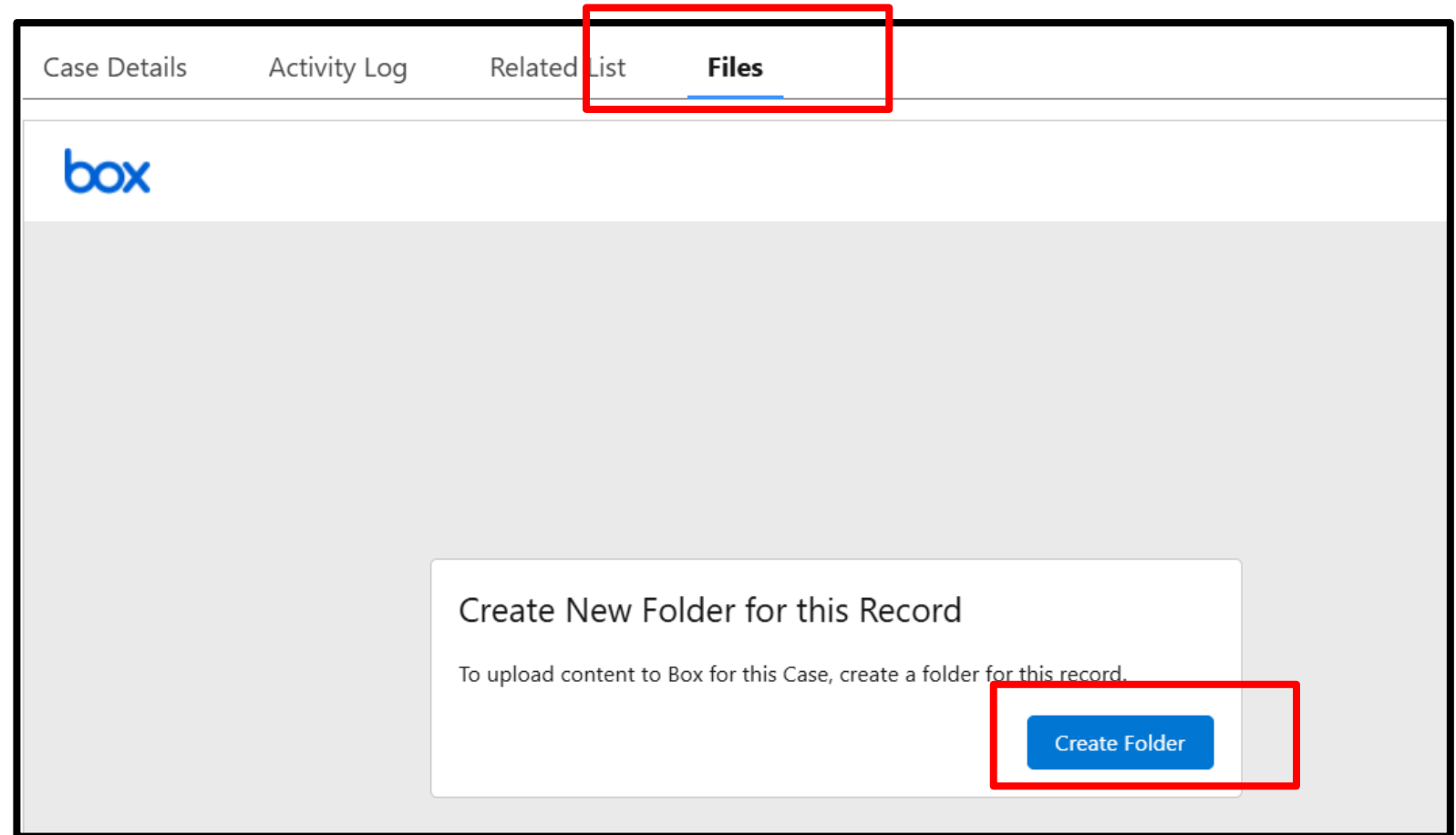
- A list of standard work plan items are available
- If a task is not needed, it can be removed by unchecking the box prior to save.
- Tasks can be re-assigned, notes can be captured, due dates can be updated
- They can be marked complete by checking the box to the left of the task

Part 5: Long-term Storage with Box

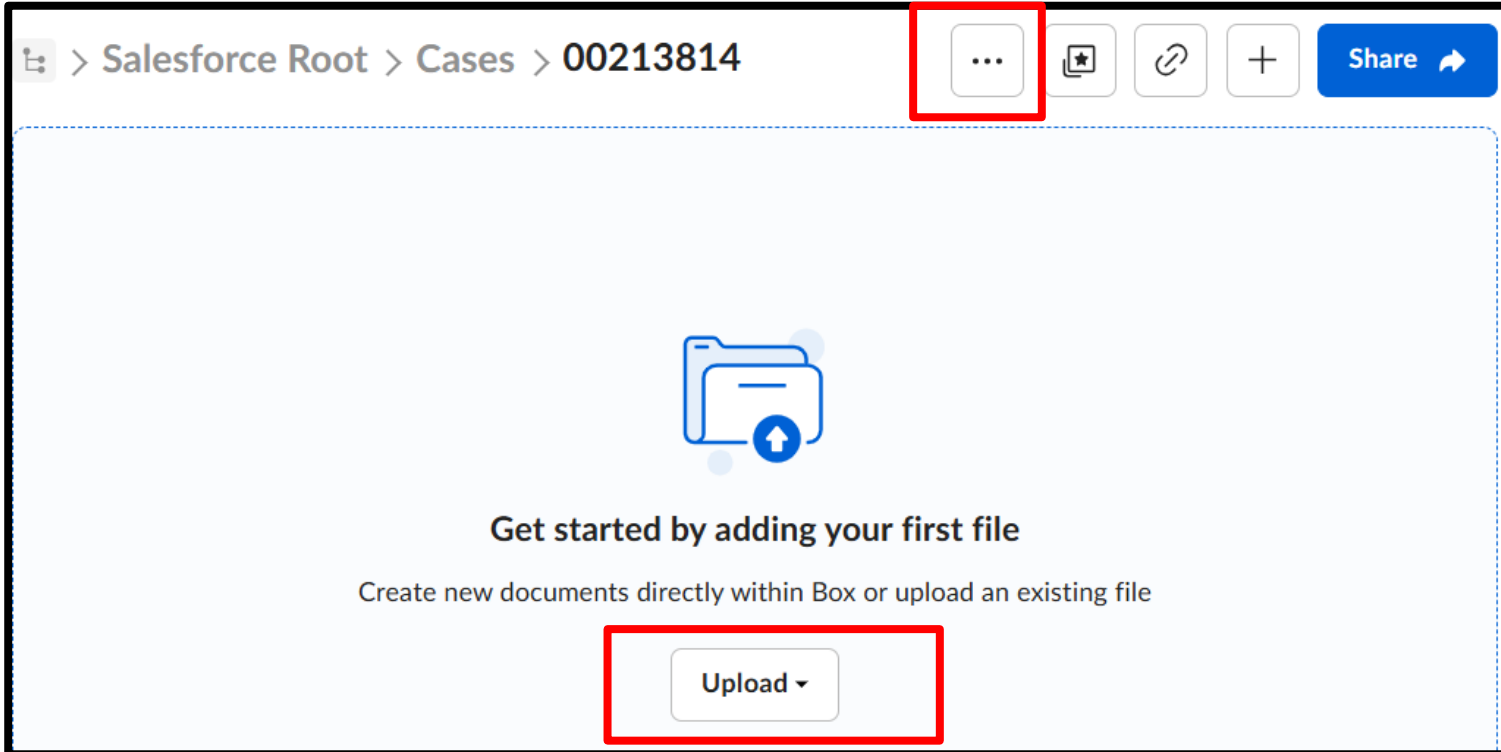
Obtaining a Facility Letter



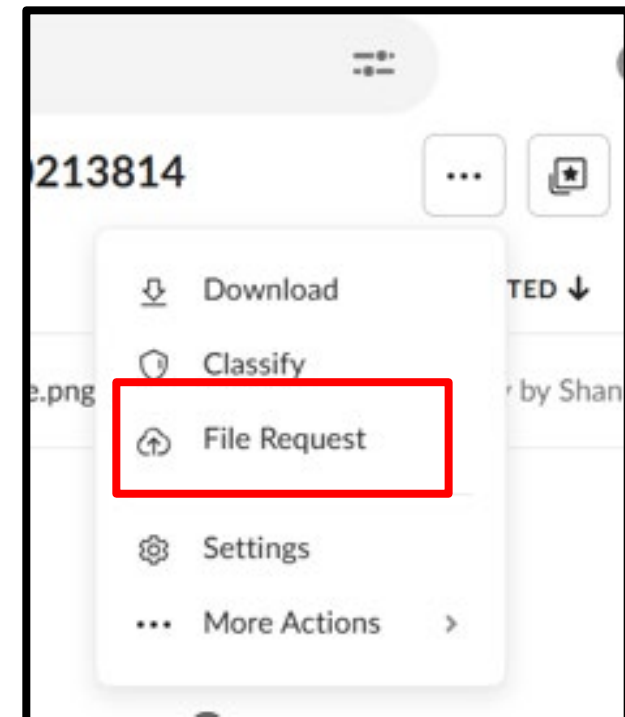
- When obtaining a facility letter for either a New Facility or for Closure, you can attach the letter to the Facility Account record via Box.
- Navigate to the Files section at on the Account.
- Select Create Folder



Obtaining a Facility Letter

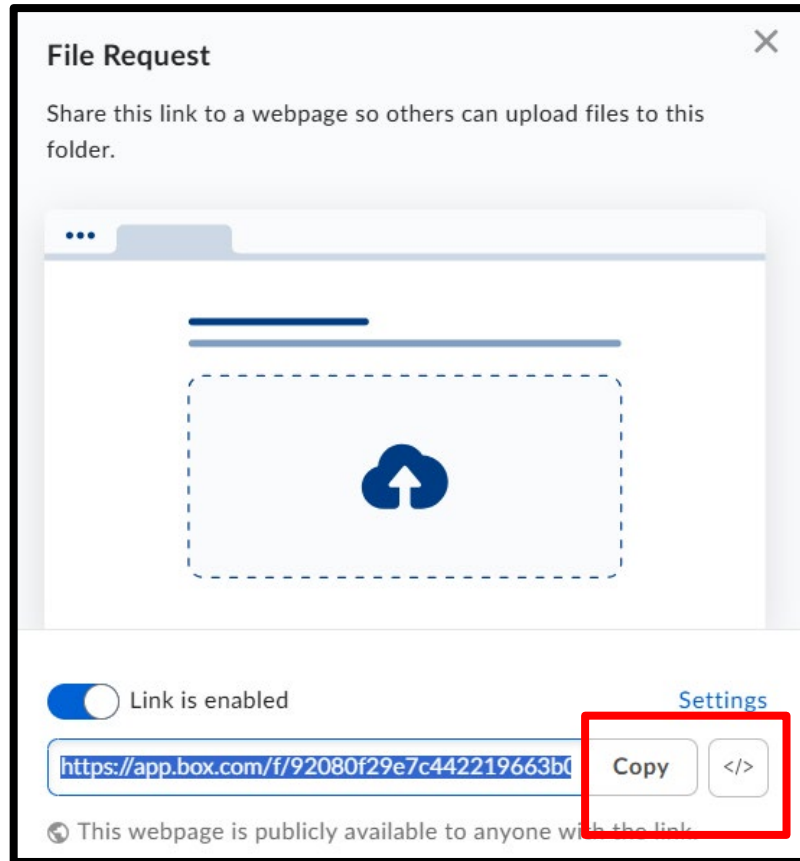


From this screen you can upload any letter or document that you may already have by selecting upload and choose your file

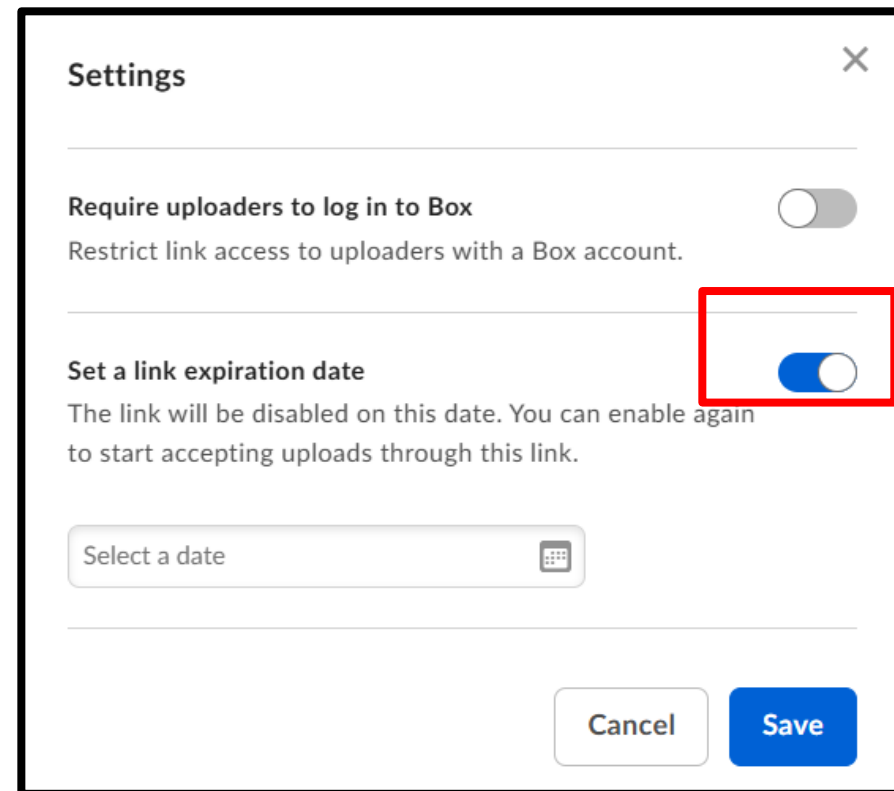


You can also generate a secure external link to send to a facility via email by going to the 3 dots and selecting File Request

Obtaining a Facility Letter



Go to settings and turn on Set a Link Expiration Date. A calendar will appear, IPRO approved process is to extend for 15 calendar days

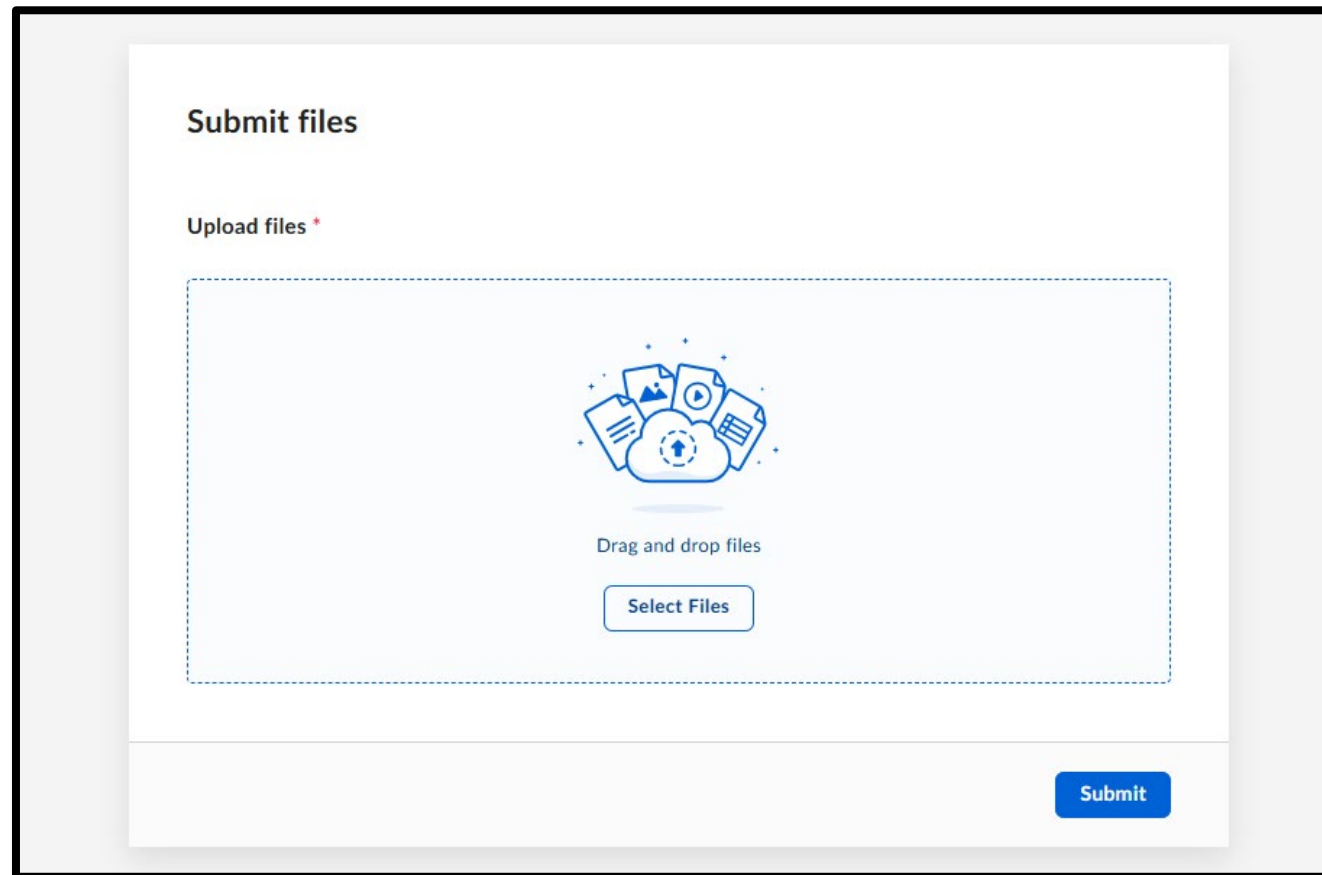


Once your expiration is set, copy the link and move over to your Case record. Create an Email or use an Email Template and insert the link for the facility to use

Obtaining a Facility Letter



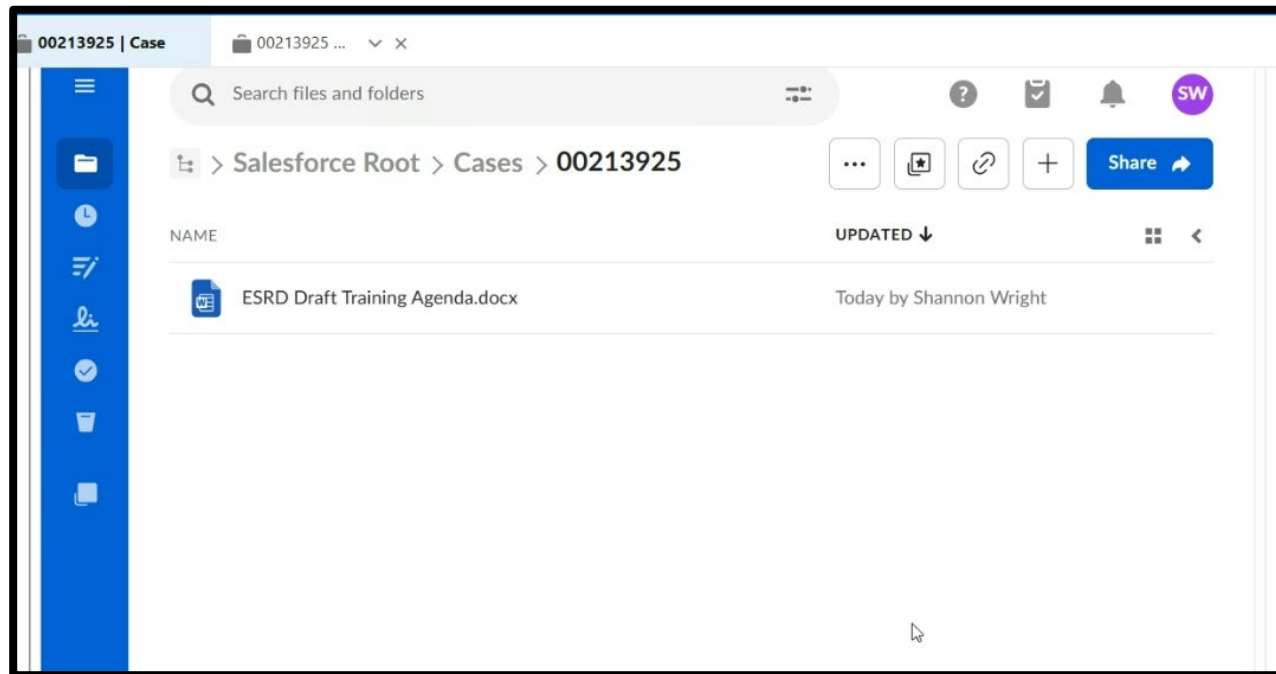
When the facility opens the file request link, they will be prompted with a Box screen to upload the file and submit. Once the file is submitted, the facility cannot retrieve or access the file. They will receive a screen notification when the file is uploaded successfully



Obtaining a Facility Letter



To review the uploaded document, go to the Account and click on Files. You will see the folder listed with the document. Click the document to review it

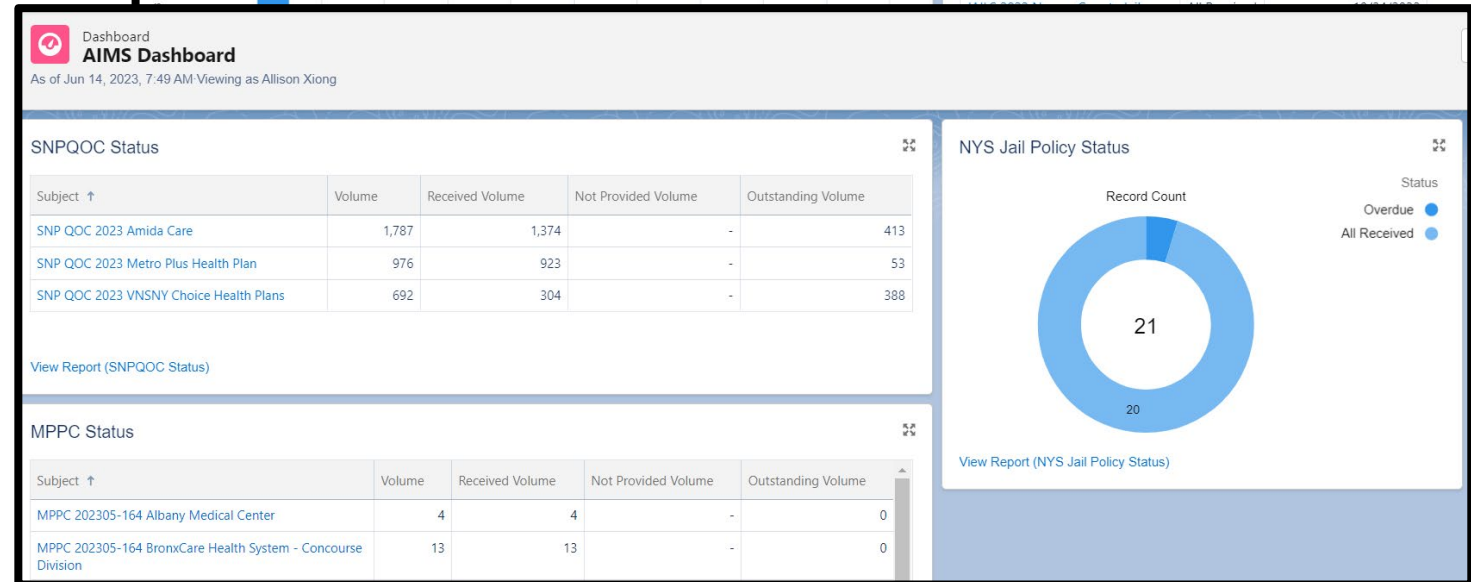


Part 6: Salesforce Reports

Salesforce Reports

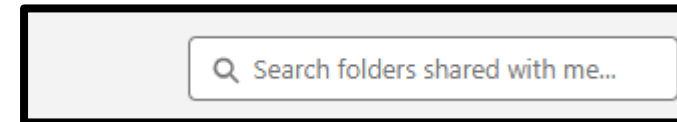
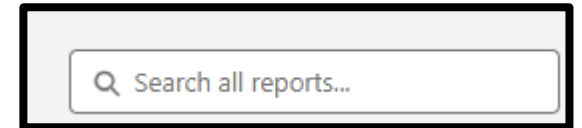
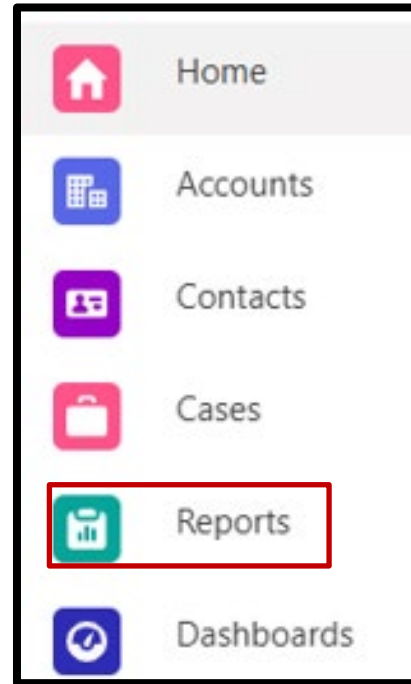


- Data Pros and Managers can apply complex filtering logic, summarize and group Salesforce data to create a variety of departmental reports
- For reports that require multiple data sources or to share directly with a Client, IPRO utilizes the Salesforce product Tableau



Salesforce Reports

- 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.

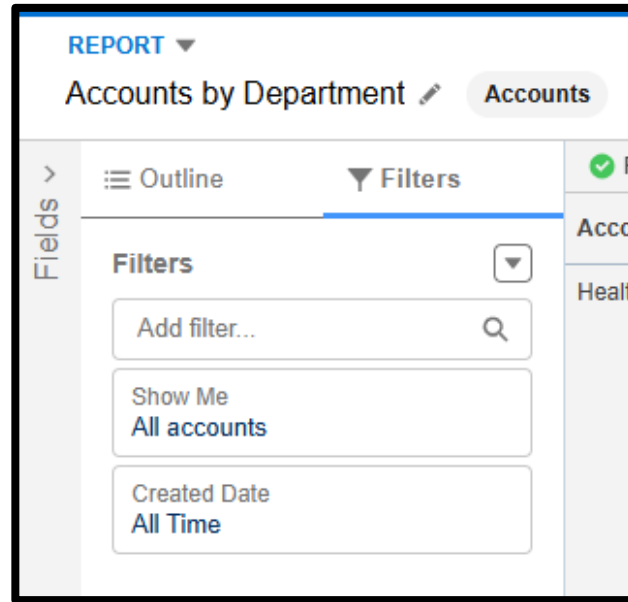


Salesforce Reports

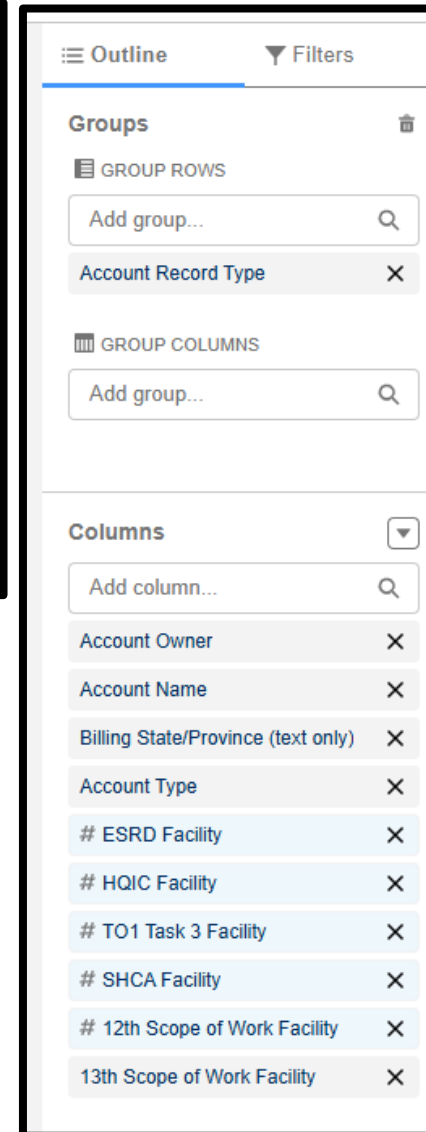


When requesting a new report, there are 3 things you need to consider:

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.

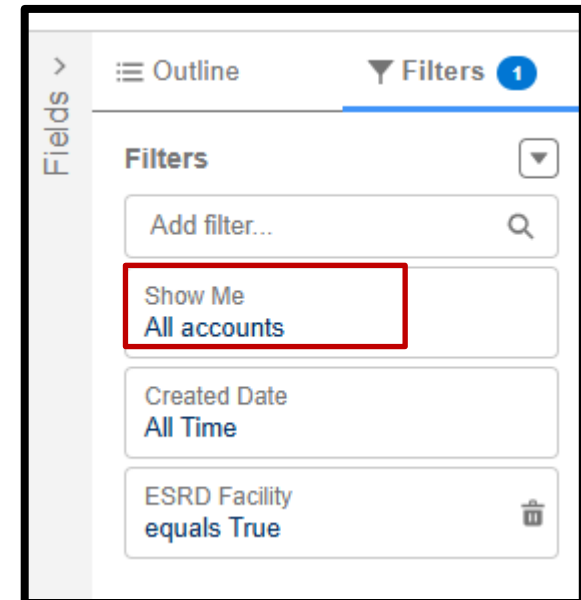
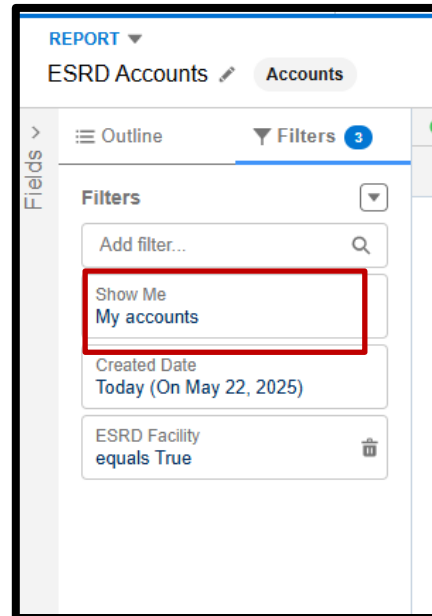
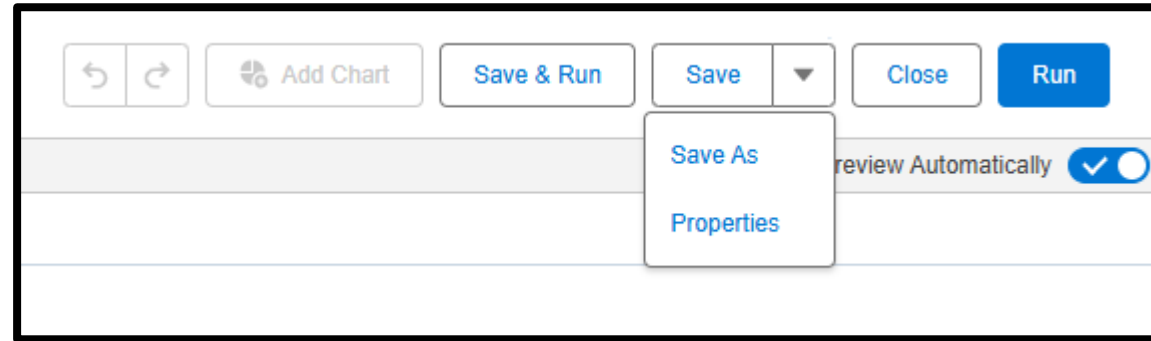
Total Records	Total ESRD Facility	Total HQIC Facility	Total TO1 Task 3 Facility	Total SHCA Facility	Total 12th Scope of Work Facility
32,659	1,993	323	8,374	1,983	2,718

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	-	-						
Subtotal					0	0	0	0	0	0
Facility (15011)										
	Kelly Arthur	St. FRANCIS Hospital	DE	Facility						
	Kelly Arthur	Bayhealth Hospital, Kent Campus	DE	Facility						
	Deborah Campbell	WHITESBURG ARH HOSPITAL	KY	Facility						
	Deborah Campbell	Owensboro Health Muhlenberg Community Hospital	KY	Facility						
	Deborah Campbell	HIGHLANDS REGIONAL MEDICAL CENTER	KY	Facility						
	Deborah Campbell	CHI Saint Joseph Health Hospital	KY	Facility						
	Deborah Campbell	CHI Saint Joseph Health London	KY	Facility						
	Deborah Campbell	UofL Health - Shelbyville Hospital	KY	Facility						
	Deborah Campbell	St. CLAIRE Regional Medical Center	KY	Facility						
	Deborah Campbell	MIDDLESBORO APPALACHIAN REGIONAL HEALTHCARE HOSPIT	KY	Facility						
	Deborah Campbell	PINEVILLE COMMUNITY HEALTH CENTER, INC	KY	Facility						
	Deborah Campbell	Flaquet Memorial Hospital	KY	Facility						
	Deborah Campbell	MARSHALL COUNTY HOSPITAL	KY	Facility						
	Deborah Campbell	MURRAY - CALLOWAY County Hospital	KY	Facility						
	Deborah Campbell	HAZARD ARH REGIONAL MEDICAL CENTER	KY	Facility						
	Deborah Campbell	UofL Health - Jewish Hospital	KY	Facility						
	Deborah Campbell	AdventHealth Manchester	KY	Facility						

Salesforce Reports



- To adapt an existing report, save a copy of the original and then update the filters behind the report to your new criteria
- In this example, we are updating a “My Accounts” report to view “All ESRD Accounts”
- Update the Show Me to “all accounts”, Created Date “All Time”, and ESRD Facility = True



Salesforce Reports



- In this example, the new report is grouped by Account Owner and shows the Account ID and Account name

The screenshot shows the Salesforce report builder interface for a report titled "All ESRD Accounts". The interface is divided into three main sections: "Groups", "Columns", and "Filters".

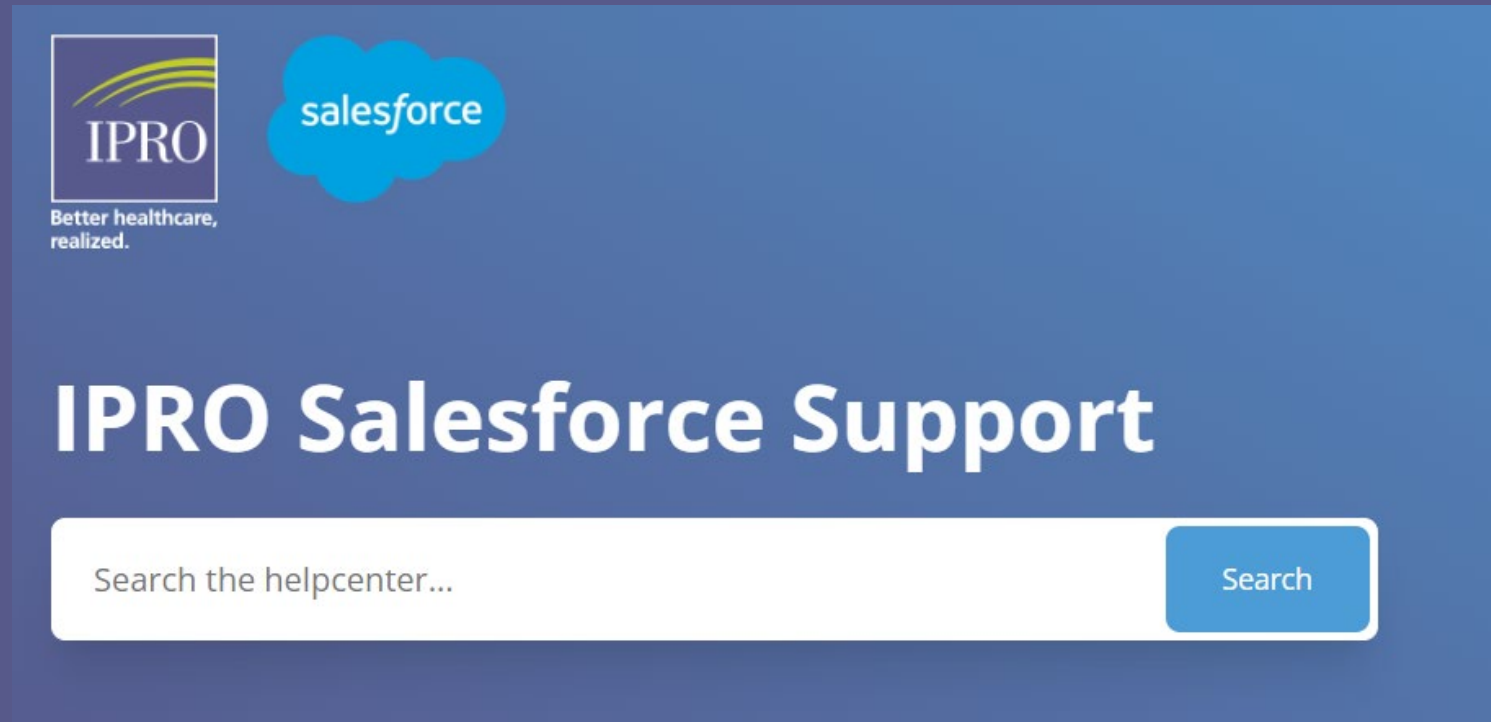
- Groups:** This section allows for grouping rows. It shows a search bar with "Add group...", a dropdown menu with "Account Owner" selected, and a trash icon.
- Columns:** This section allows for selecting columns to display. It shows a search bar with "Add column...", and two columns are selected: "Account ID" and "Account Name".
- Filters:** This section shows "Filters 1" with a dropdown arrow.

The screenshot shows the final report for "All ESRD Accounts". The report title is "Report: Accounts All ESRD Accounts". A warning message states: "This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results." The total number of records is 2,003.

<input type="checkbox"/> Account Owner ↑	<input type="checkbox"/> Account ID	<input type="checkbox"/> Account Name ↑
<input type="checkbox"/> Corina Downey-Konkus (4)	0010t00000gpM4t	ESRD Network 1 Anonymous Facility
	0010t00000gpXWQ	ESRD Network 2 Anonymous Facility
	0010t00000gpYFI	ESRD Network 6 Anonymous Facility
	0010t00000gpGaU	ESRD Network 9 Anonymous Facility
Subtotal		
<input type="checkbox"/> Duana Davis (30)	0010t00000eEg6o	Cassena Kidney Care at Norwalk
	0010t00000eCWmp	CertiSurv
	0010t00000eDph0	CGS Administrators, LLC
	0010t00000eCWmo	CHILDRENS HOSPITAL MEDICAL CENTER CINCINNATI
	0010t00000eEg7H	COMMUNITY DIALYSIS CENTER
	0010t00000eEg6y	Dartmouth Hitchcock Medical Center - Transplant
	0010t00000eEg7L	DaVita Rome Dialysis
	0017y00000zBLh7	Duana Torrent Test
	0010t00000eEg79	DUKE UNIVERSITY MEDICAL CENTER TRANSPLANT PROGRAM
	0010t00000eCWmn	EGLESTON CHILDRENS HOSPITAL
	0010t00000eEg71	FMC OF AUGUSTA INC
	0010t00000eEg70	Fresenius Kidney Care Rock Quarry
	0010t00000eEg72	Fresenius Kidney Care Willow Grove

At the bottom of the report, there are four toggle switches: "Row Counts" (checked), "Detail Rows" (checked), "Subtotals" (checked), and "Grand Total" (checked).

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.



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<http://ipro.org>

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