



Salesforce: ESRD Patient Services Training

05/30/2025

What will be covered in this training?



- **Part 1: Review of Accounts, Contacts, Activities**
- **Part 2: Creating and Managing Cases**
- **Part 3: Reviews and Corrective Action Plans**
- **Part 4: BOX Long-Term Storage**

This training will help you complete the following actions:

- Review Accounts, Contacts, and Activities
- Creating and Managing Patient Services Cases
- Documenting Reviews for Nurses
- Documenting and Managing Corrective Action Plans
- Storing, Reviewing, and Printing Documents in Box



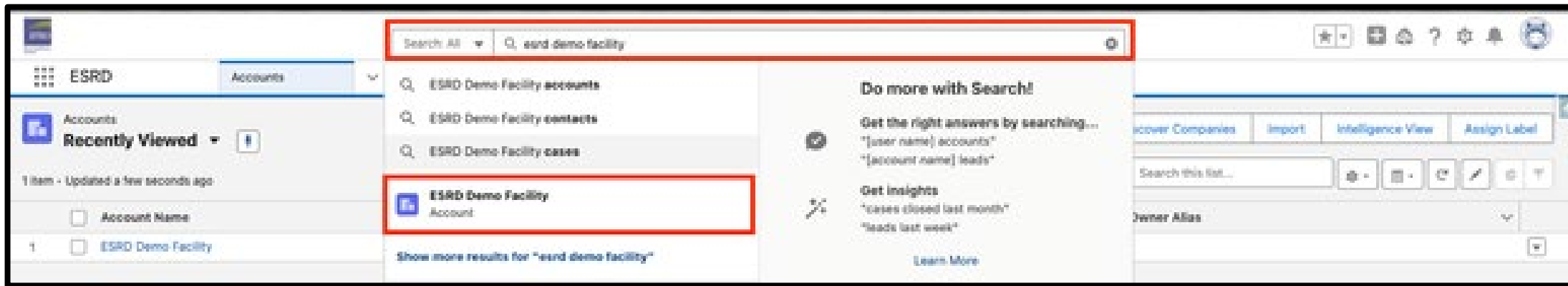
Part 1: Review of Accounts, Contacts, and Activities



Searching for a Record in Salesforce



From the top of your screen using Global Search, you can search for any type of record using at least 3 characters. Search for an account by 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

The screenshot shows the "ESRD Details" page for a facility. The page is divided into two columns of information, each with a pencil icon for editing. The left column contains:

Facility Open Date	1/1/2025
Certified Services	
Network	Network 1
Auth_BSO_desc	ESRD Test Facility

The right column contains:

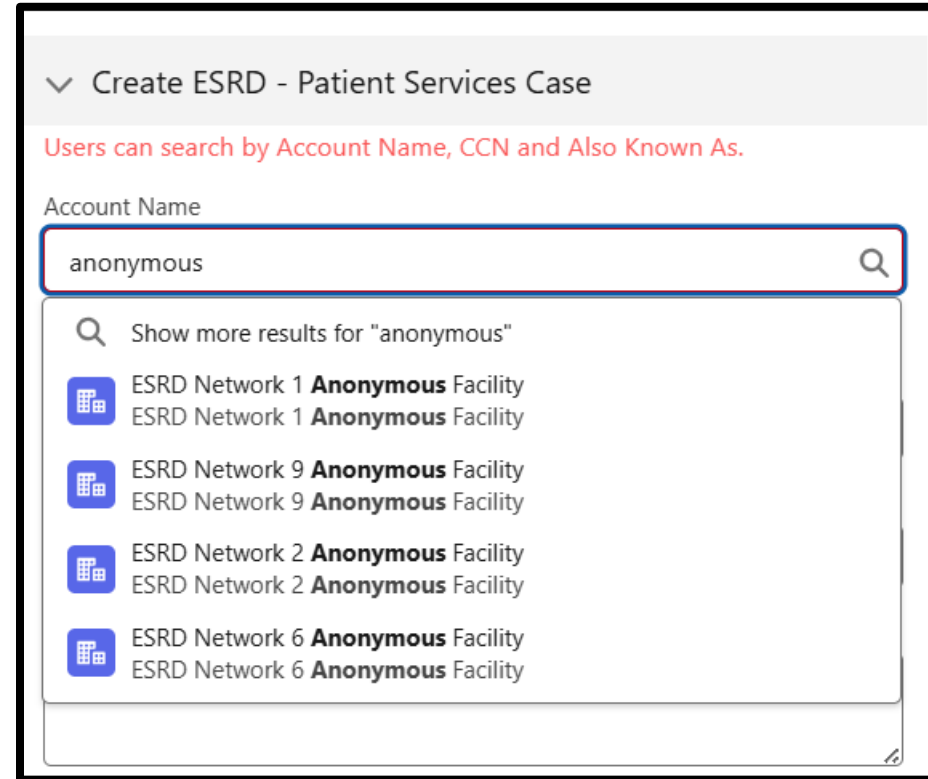
Facility Status	Pending Certification
Independent	<input type="checkbox"/>
Facility Certified Date	1/1/2025
Facility ID	0000123123
EQRS Facility Demographic	EFD-0003

Patient Service Accounts

Unique Account Cases



Cases that are required to be Anonymous can be associated with the Account Type ESRD Network X Anonymous Facility. Each Network has this Anonymous Account type available for use.



If you are working a grievance case with an Acute care hospital that is not already in Salesforce and need to create a new account, use the American Hospital Directory link to find the CCN/TIN information to create the hospital account. <https://www.ahd.com/search.php>



Creating a New Contact



The screenshot shows the 'New Case: ESRD - New Facility' form. The 'Accounts' dropdown menu is open, showing 'Contacts' 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...). A legend indicates that an asterisk (*) denotes required information.

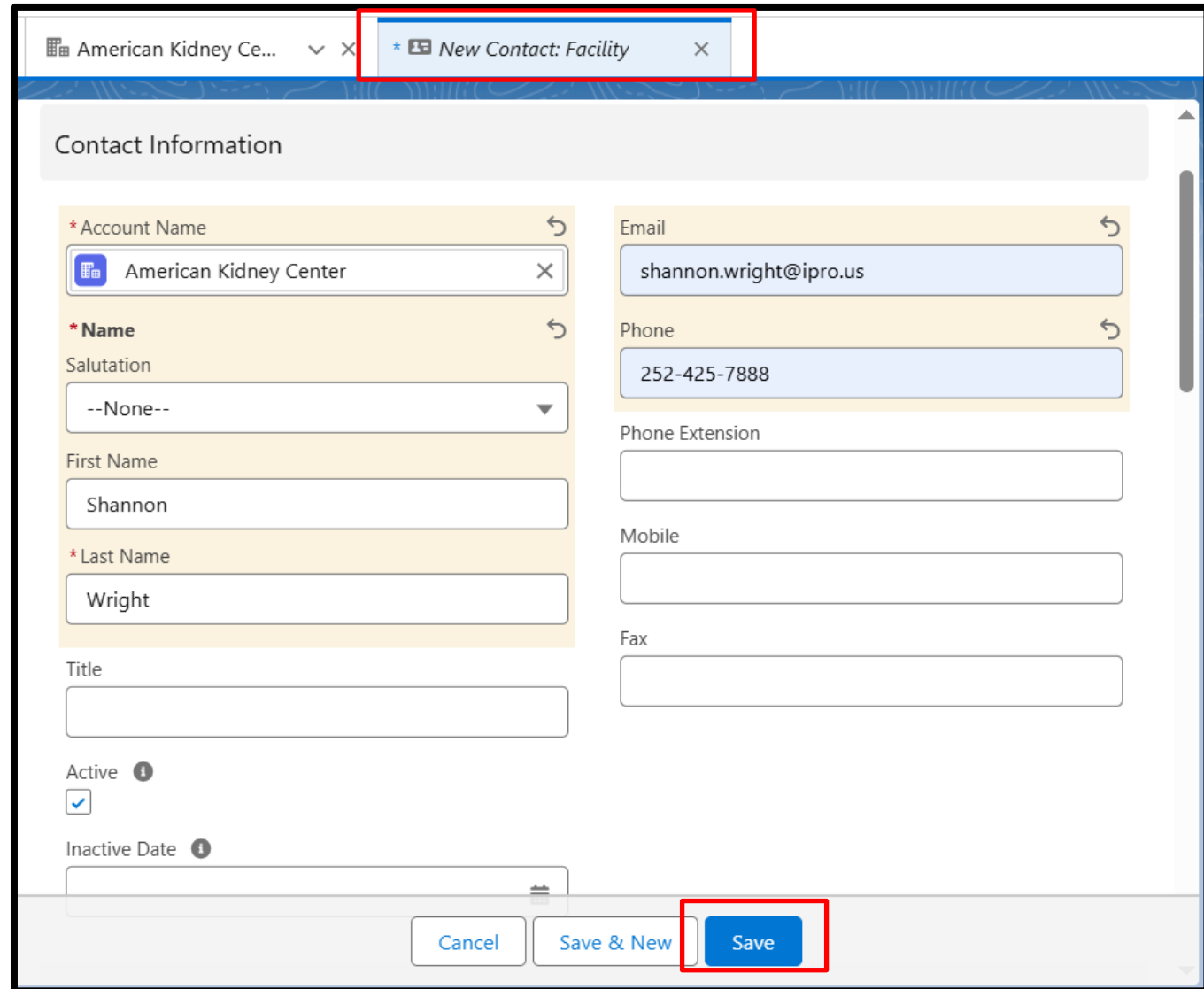
- Before adding a new Contact, use the search to see if the record already exists. If it does not, create new
- From the dropdown, Select Contacts
- Select New to create a new Contact
- **Note:** A separate tab is created, the American Kidney Center Case Tab and Account tab are still available

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

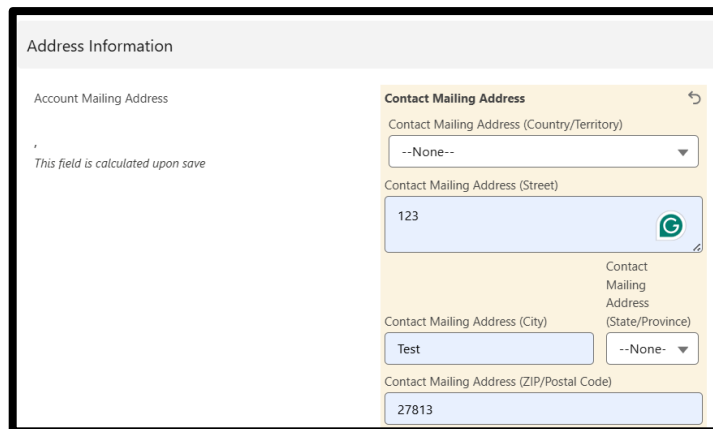
Phone ↶
252-425-7888

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

Contact Mailing Address (State/Province)
--None-- ▾

This field is calculated upon save

Creating a New Contact



- If your contact is a Patient Facility Representative (PFR), add the appropriate details under the PFR Information section on the Contact Record

PFR Information	
PFR Type	Patient Modality
Patient Name	Patient Date of Death
Patient UPI	Application Completed Date
Patient Sex	Peer Mentor <input type="checkbox"/>
Patient Race	Onboarding Resources Provided <input type="checkbox"/>
Patient Ethnicity	Completed Peer Mentor Training <input type="checkbox"/>
	PFR Opt Out <input type="checkbox"/>



While the Contact record is shared with other IPRO departments, only the ESRD Team can see the PFR Information section

Creating a New Contact



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

Contact **Shannon Wright** + 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	

Activity Tracking



- The Activity Panel is where you can create an email, detail a completed phone call, or log a future or completed task. The panel might look different depending on the Salesforce object you are in
- 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.

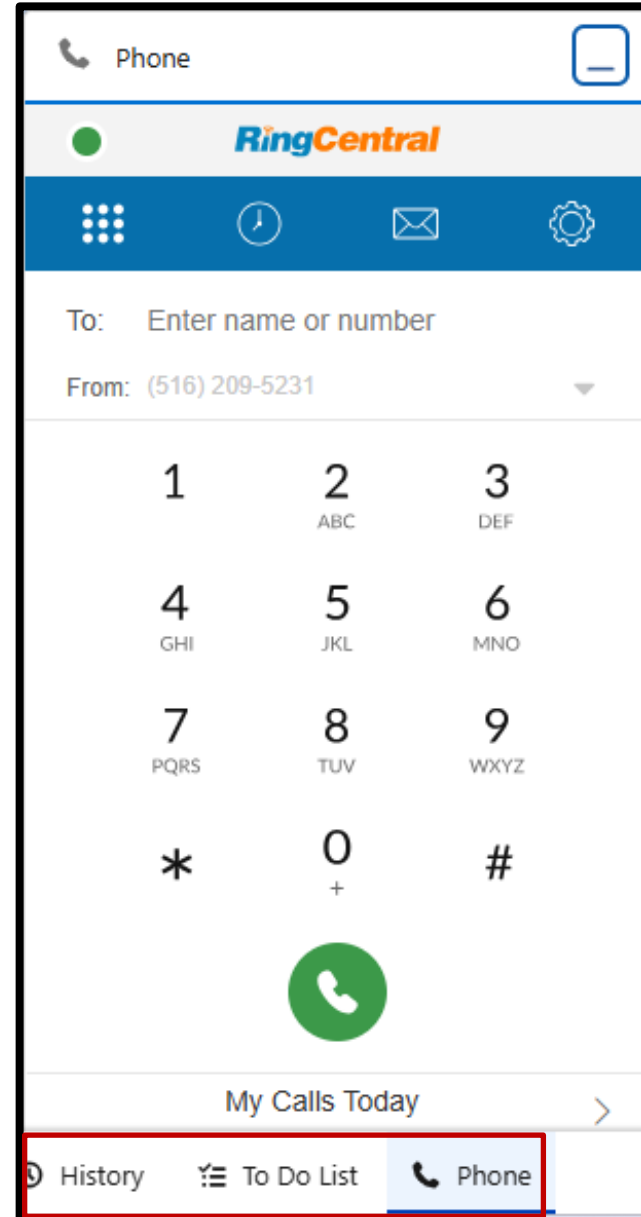


The screenshot shows the Salesforce Activity Panel for a record. At the top, there is a red-bordered box containing three activity type icons: an envelope (Email), a telephone handset (Phone Call), and a checklist (Task). Below this, the panel displays a list of activities. The first section is titled "Upcoming & Overdue" and contains two tasks for "SFAE: QIN-QIO Outreach". The first task is due on "Aug 17, 2024" and is associated with "Ira Dave" and "Corina Downey-Konkus". The second task is due on "Aug 10, 2024" and is associated with "Rurik Peterson". A "View More" button is located below these tasks. The second section is titled "May - 2025" and contains three phone call activities. The first call is on "May 13" with "Nic Barton". The second call is on "May 13" with "Ritha Choudhury-Rahman". The third call is on "May 12" with "Ritha Choudhury-Rahman". The interface includes filter options at the top right: "Filters: All time • All activities • All types" with a settings gear icon, and action links: "Refresh • Expand All • View All".

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>



Salesforce and Outlook Integration

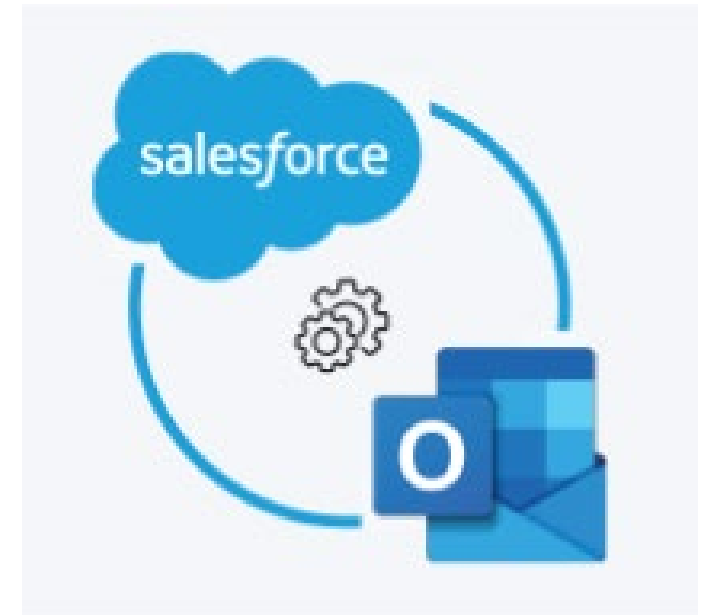


Salesforce can send email correspondence using templates or custom emails and automatically save that email as a Completed Task on the object it is created.

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>



Workplans: A Preset Task Series



- Workplans allows managers to create a template that contains a series of tasks that need to be completed on a case
- Each department can have multiple Workplan Templates published. When a Patient Service Case is created or transitioned to another case type, the appropriate Workplan will automatically assign tasks
- Click on the blue task name to enter details about the task, change the task owner, or update the status of the task
- Tasks that are Overdue will turn Red in the Due Date

A screenshot of a software interface titled "Activity". At the top, there are tabs for "Log a Call", "New Task", and "Email". Below these is a search bar with the placeholder text "Recap your call..." and an "Add" button. The main content area shows a list of tasks for a user named "Shannon Wright". The tasks are grouped under "Upcoming & Overdue" and "May • 2025". The task "Create Patient Acknowledgement Letter" is highlighted with a red box and is marked as "Yesterday". Other tasks include "Send Patient Acknowledgement Letter" (marked "Today") and "Enter Case to PCU" (marked "No due date"). There are also filter options and a "View More" button.

Documenting Tasks for PCU



- Patient Services requires accurate Task recording to update the PCU database per contract
- When creating/updating Tasks, it is a recommended process to start the Task Comment with the date/time/duration spent on the first line of the comment so that it is reported correctly
- When the Task is a Patient or Provider Intervention, that should be listed in the Subject of the Activity for extra careful review by the PCU Agent
- If you have any questions about the process for documenting Case Activities for the PCU, please consult your SME or Leadership Team

Activity

Log a Call | **New Task** | Email

Subject
Patient Complaint Follow up

Due Date
5/30/2025

* Assigned To
Corina Downey-Konkus

Name
Search Contacts...

Related To
00213779

Related To
00213779

* Status
Completed

Comments
Tip: Type Control + period to insert quick text.
5/30/2025 9:50 Duration: 20 minutes
Spoke with patient today as a follow up per incident...

* Priority
Normal

Save

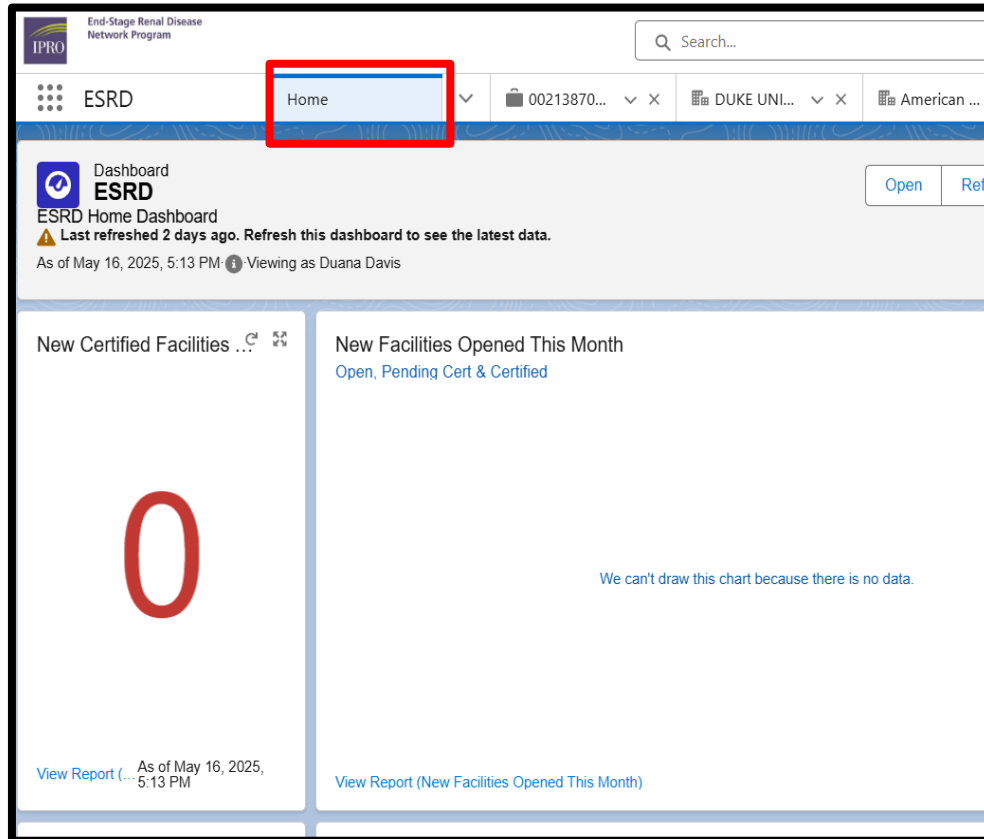
Part 2: Creating a Case



Creating a New Case



- From the Home screen, you can quickly create a Patient Service Case by first searching for the Account Name, CCN, or Also Known As Name and select the Account the case is associated with.
- Enter the Case Initiation Date and Case Type: Note Access to Care Cases have additional case subtypes
- Capture any Initial Case Notes



Click here to open Case.

Finish

▼ Create ESRD - Patient Services C

Users can search by Account Name, CCN and

Account Name

Search Accounts...

* Case Initiation Date

* Type

--None--

Initial Case Notes

▼ Reporter/Patient Information

Reporter Name Patient First Name

Reporter Phone Patient Last Name

Additional details can be optionally added:

- Reporter Name
- Reporter Phone
- Patient First Name
- Patient Last Name
- Patient Phone

Case Details Page

Patient Services Case Summary Section



TIP: When editing the case details page, all edits will open. You will be required to add the Reporter Type, Initiation Date, and Area of Concern to save the case



▼ Patient Services Case Summary

Case Owner
 [Shannon Wright](#)

Network PCU Agent

Case Number
00213890

PCU Case Number

Initiation Date

Days Open

Change Case Owner

* = Required Information

* Select New Owner

Search Users...

Send notification email

The new owner will also become the owner of these records related to **00213890** that are owned by you.

- Notes and attachments
- Open activities

- The Case Owner is the person who is accountable for managing the case to completion. Click the icon to change owners. Select the new owner and check the box to send email notifications.
- Network PCU Agent - the person adding information into the PCU
- Case Number is the Salesforce assigned record number
- Enter the PCU case number assigned to patient from PCU
- Populate the Initiation Date (*Required field)
- Days Open – Auto-calculated after Save based on the date the case was opened

Case Details Page

Reporter / Patient Details Section



- Any information captured during case creation will be prepopulated. Click the pencil to edit fields and update additional information received
- The reporter listed here may be a caregiver, patient, facility staff member or other professional.

▼ Reporter / Patient Details

Reporter Permission		Patient Permission	
Reporter Name		EQRS UPI	
Reporter Type		Patient First Name	
Reporter Phone		Patient Last Name	
Reporter Email Address		Patient Phone	
Reporter Mailing Address		Patient Email Address	
United States		Patient Mailing Address	
		United States	



TIP: Information populated in fields like EQRS UPI may be used to pre-populate email templates. Fill out the Patient Mailing address for any grievances that require hard copy letters be mailed.

Case Details Page

Reporter / Anonymous and Confidential



- Reporter Permission allows you to mark a case to be anonymous or confidential

Reporter / Patient Details

Reporter Permission

Available

Chosen

Anonymous

Confidential

Patient Permission

Available

Chosen

Anonymous

Confidential

The image shows a screenshot of a web interface for setting permissions. It features two main sections: 'Reporter Permission' and 'Patient Permission'. Each section has an 'Available' list on the left and a 'Chosen' list on the right. In the 'Reporter Permission' section, the 'Available' list contains 'Anonymous' and 'Confidential', while the 'Chosen' list is empty. In the 'Patient Permission' section, the 'Available' list also contains 'Anonymous' and 'Confidential', and the 'Chosen' list is empty. Small right-pointing and left-pointing arrows are positioned between the 'Available' and 'Chosen' lists in both sections, indicating the ability to move items between them.

Case Details Page

Patient Services Case Details Section:



- The subject line is pre-populated with the Network # and the Type of Case you selected.
- The description is pre-populated with initial standard language. Click the pencil to edit the description to include the concerns reported by the Grievant.

 [Work Plans \(1\)](#)

Case Details

Case Resolution

Activity Log

Related List

Files

∨ Patient Services Case Details

Subject

Network 9 - Immediate Advocacy



Description

The Network (NW) received a call from grievant. The NW explained the role of the NW and explained grievant's right to file a grievance with Department of Public Health (DPH). The NW explained grievant's right to file anonymously. Grievant DID/DID NOT give consent to NW to disclose their name with the facility. Grievant reported the following concerns:



Case Type Details

Case Type Details Section:



- The type is prepopulated with the case type selected.
- Click the pencil to choose the Areas of Concern from the available options.

Case Type Details

Type
Immediate Advocacy

Area(s) of Concern

Area(s) of Concern Subreasons

Clinical Quality of Care Subreason

Physical Environment Subreason

Treatment Related Subreason

* Area(s) of Concern

Available

Clinical Quality of Care

Other Personal Conflict

Physical Environment

Staff Related

Chosen

Staff Related Subreason

The screenshot displays a web form for 'Case Type Details'. The 'Type' is set to 'Immediate Advocacy'. The 'Area(s) of Concern' field is currently empty, and a red box highlights a pencil icon next to it, indicating that it can be edited. Below this, the 'Area(s) of Concern Subreasons' section lists 'Clinical Quality of Care Subreason', 'Physical Environment Subreason', and 'Treatment Related Subreason', each with a pencil icon. A modal window titled '* Area(s) of Concern' is open, showing a list of available areas: 'Clinical Quality of Care', 'Other Personal Conflict', 'Physical Environment', and 'Staff Related'. A 'Chosen' box is empty. The 'Staff Related Subreason' field is also visible at the bottom of the modal.

Case Type Details

Area(s) of Concern Subreasons:



- Click on the Areas of Concern Subreason(s) from the available options (**NOTE:** Subreasons show after the edit is used in other areas of the screen)
- Use the arrow to select from the picklist.

Area(s) of Concern Subreasons

Clinical Quality of Care Subreason		Other Personal Conflict Subreason	
Available	Chosen	Available	Chosen
<ul style="list-style-type: none">Access Site IssuesInfection ControlOther Clinical / NOSPatient Safety / Health Iss...		<ul style="list-style-type: none">At-Risk for Involuntary Dis...Disruptive Family MembersGeneral / NOSPatient to Patient Conflict	

Physical Environment Subreason		Staff Related Subreason	
Available	Chosen	Available	Chosen
<ul style="list-style-type: none">Building RepairGeneral / NOSInfestationNoise		<ul style="list-style-type: none">Clinical CompetencyCommunication / Miscom...General / NOSPhysician Relations / Physi...	

Treatment Related Subreason

Available	Chosen
<ul style="list-style-type: none">Facility Policies / ProceduresGeneral / NOSPhysician OrdersScheduling Issues	

Case Type Details



Facility Details Section

- The Facility Details are prepopulated based on the Facility that you associate to the case.
- Contacts added in this section should be created as a Contact and associated with the Facility. This should be the primary person you are working with on this case.

▼ Facility Details	
Also Known As DaVita Lawrenceburg Dialysis Center	Contact Name
Account Name DaVita Lawrenceburg Dialysis Center	Contact Email
Account CCN ID 152511	Contact Mobile
Network Network 9	Contact Phone
Facility ID 900000107	


Case Type Details


Date Details



- Enter the date the patient was informed of their Anticipated Discharge.





▼ Date Details

Patient Informed Anticipated Discharge 



- System Information is used by the Salesforce Team and is not editable. You can optionally collapse this section if you do not want to see the data in it

▼ System Information

External ID		Created By	 Shannon Wright , 5/19/2025, 2:07 PM
Date/Time Opened		Last Modified By	 Shannon Wright , 5/19/2025, 2:07 PM
5/19/2025, 2:07 PM		Case Record Type	ESRD - Patient Services
Days Open			

Case Type Details



The top banner provides an overview of key information related to the case that is captured in the detailed screens.

The screenshot displays the 'Case Type Details' interface. At the top, a banner shows the case ID '00213781' and several action buttons: 'ESRD - Log PCU Activity', 'Create Corrective Action Plan', 'External Box Folder Creation', and 'Edit'. Below this is a table with case details:

Case Owner	Account Name	Subject	Initiation Date	Due Date	Days Open
Shezeena Andiappen	DaVita Shelton Dialysis	Network 1 - General Grievance	4/16/2025	6/15/2025	36

Below the table is a status bar with a progress indicator. The 'Open' status is highlighted in blue, and the 'Closed' status is in grey. A button labeled 'Mark Status as Complete' is visible on the right. At the bottom, a 'Related List Quick Links' section contains several links with icons and counts: Notes (0), Reviews (0), Related Cases (0), Open Activities (8), Activity History (5), Case History (10+), and Work Plans (2).

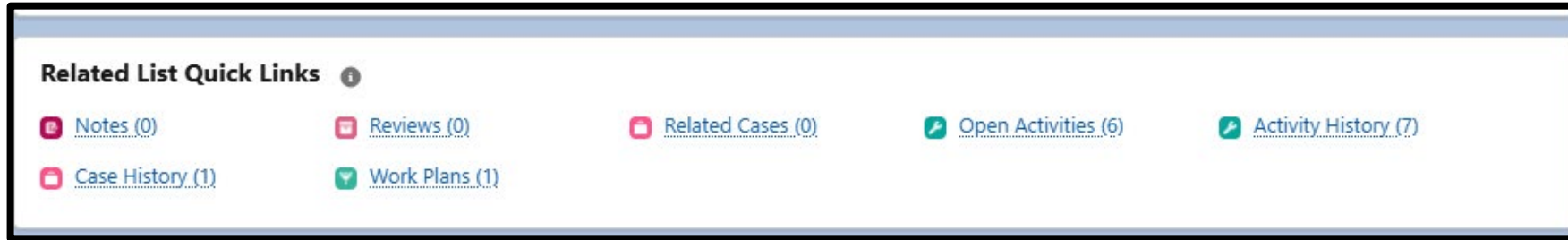
The Status Bar shows the current case status and allows you to quickly change the status using the Mark Status as Complete button.

Case Type Details



Related Quick Links

The related quick links section provides quick access to key areas that is part of the case management process.



- **Notes:** Initial notes captured during case creation from the home screen are located here. Use this section to capture additional notes as part of your case management process
- **Reviews:** Includes information from QI case review assignments for Nurse Reviewers
- **Related Cases:** An example of information here may be a case that converts from an IA to a GG
- **Open Activities:** Future or Overdue activities
- **Activity History:** Closed Activities
- **Case History:** Changes made to fields that are history tracked on the case
- **Workplan:** Work Plan activities



Notes are not reportable Activities for CMS. You will want to create an activity on the case that references the Note if you need to have it appear in a report or added to PCU. This includes Notes created from the Home Screen

Converting a Case

Immediate Advocacy to a General Grievance,

The case type Date Change and New Work plan tasks populate based on the date/time the change in case type was saved.

Enter a summary of Grievance if needed



Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

- > Send Patient Acknowledgement Let... May 29 ▼
[Javier Ruales](#) has an upcoming task
- > Create Patient Acknowledgement L... Tomorrow ▼
[Javier Ruales](#) has an upcoming task

▼ Case Type Details

Type	Case Type Date Change
General Grievance	5/27/2025, 10:09 AM
Area(s) of Concern	Clinical Review Completion Date
Physical Environment	
	Summary of Grievance
	Undercovered additional findings that require conversion to General Grievance

Cases > 00213801
Work Plans

2 items • Updated a few seconds ago

<input type="checkbox"/>	Work Plan Name	Status	Work Plan Template	
1	<input type="checkbox"/> ESRD - Immediate Advocacy	Cancelled	ESRD - Immediate Advocacy	▼
2	<input type="checkbox"/> ESRD - Immediate Advocacy converts to General Grievance	In Progress	ESRD - Immediate Advocacy converts to General Grievance	▼

Converting a Case

Immediate Advocacy to a Quality of Care Case




- Click the pencil to edit the Case Type, Selecting Clinical Quality of Care
- Populate the Nurse Reviewer assigned to review the case.
- The Nurse Reviewer will receive a task assignment notification

Case Type Details

Type
Immediate Advocacy

Area(s) of Concern

* Type 

Clinical Quality of Care

[View all dependencies](#)

* Area(s) of Concern

Available

- Clinical Quality of Care
- Other Personal Conflict
- Special Circumstance
- Staff Related

Chosen

- Physical Environment


[View all dependencies](#)



Case Type Date Change
5/27/2025, 10:09 AM










Clinical Review Completion Date


Nurse Reviewer

Search People...

Summary of Grievance 

Salesforce Sans 12  **B** *I* U 

Undercovered additional findings that require conversion to Quality of Care Case 

Creating a New Access to Care Case



▼ Create ESRD - Patient Services Case

Users can search by Account Name, CCN and Also Known As.

Account Name

* Case Initiation Date

* Type

* Access to Care Subtype

Initial Case Notes

[Click here to open Case.](#)

Finish

- From the Home screen, you can quickly create a Patient Service Case by first searching for the Account Name, CCN, or Also Known As Name
- For Access to Care Case Types, you will be required to enter a Subtype: At Risk, Failure to Place, Confirmed Discharge
- Add your initial notes as before
- Next click Create Case, then Click to Open Case.

Creating a New Access to Care Case



Once the case is created, open the case record and complete the rest of the case details. It is important to ensure that you have listed:

- Access to Care Reason
- Access to Care Subreason(s)
- At Risk Notice Date

The screenshot shows a web interface for case details. It is divided into two main sections: 'Case Type Details' and 'Area(s) of Concern Subreasons'. The 'Case Type Details' section includes fields for 'Type' (Access to Care), 'Access to Care Subtype' (At Risk), 'Access to Care Reason', 'Access to Care Subreason', and 'At Risk Notice Date'. The 'Area(s) of Concern Subreasons' section includes fields for 'Clinical Quality of Care Subreason', 'Physical Environment Subreason', 'Treatment Related Subreason', 'Other Personal Conflict Subreason', and 'Staff Related Subreason'. Red boxes highlight the 'Access to Care Reason' and 'Access to Care Subreason' fields in the first section, and the entire 'Area(s) of Concern Subreasons' section in the second section. Each field has a small pencil icon to its right, indicating it is editable.

Case Type Details	
Type Access to Care	At Risk Notice Date
Access to Care Subtype At Risk	
Access to Care Reason	
Access to Care Subreason	

Area(s) of Concern Subreasons	
Clinical Quality of Care Subreason	Other Personal Conflict Subreason
Physical Environment Subreason	Staff Related Subreason
Treatment Related Subreason	

Managing Immediate Advocacy Cases



Like with Access to Care cases, Immediate Advocacy cases have additional required fields after the case is created. Navigate to the case and Complete the Area(s) of Concern and the Area(s) of Concern Subreasons

Case Type Details

*Type
Immediate Advocacy

[View all dependencies](#)

*Area(s) of Concern

Available

- Clinical Quality of Care
- Other Personal Conflict
- Treatment Related

Chosen

- Physical Environment
- Staff Related

[View all dependencies](#)

Area(s) of Concern Subreasons

Clinical Quality of Care Subreason

Available

- Access Site Issues
- Infection Control
- Other Clinical / NOS
- Patient Safety / Health ...

Chosen

Other Personal Conflict Subreason

Available

- At-Risk for Involuntary Di...
- Disruptive Family Members
- General / NOS
- Patient to Patient Conflict

Chosen

Physical Environment Subreason

Available

- General / NOS
- Infestation
- Noise
- Temperature

Chosen

- Sanitary Conditions

Staff Related Subreason

Available

- Clinical Competency
- Communication / Misc...
- General / NOS
- Professionalism

Chosen

- Physician Relations / Phys...

Assign using active assignment rule

[Cancel](#) [Save & New](#) [Save](#)

Part 3: Working a Case with Nurse Reviews and Corrective Action Plans



Quality of Care Case Reviews

Nurse Reviewers



Related List Quick Links ⓘ

[Notes \(0\)](#) [Reviews \(1\)](#) [Performance Improvement Plans \(0\)](#) [Related Cases \(0\)](#)

- Once a Nurse Reviewer is added to a Clinical Quality of Care Case, they will be notified to log into Salesforce and complete the Review
- On the case, click the Related List or the Related list Quick Link for Reviews to access the Review Record details

Case Details Case Resolution Activity Log **Related List** Files

Notes (0)

Reviews (1)

Review Name

[00227794-Review Record](#)

[View All](#)

Quality of Care Case Reviews

Nurse Reviewers



- To begin working on a case review, set the Status to In Progress
- The Case ID, Owner, Summary of Grievance, and Review name will populate with data from the Case
- Add the necessary Summary Details

The screenshot displays a web interface for a case review record. At the top, it shows the title "Review 00227794-Review Record". Below this, a table lists key information: Case ID (00227794), Status (In Progress), Review Completion Date, and Owner (Ritha Choudhury-Rahman). The interface is divided into two main sections: "Details" and "Related". The "Details" section is further divided into "Review Details" and "Summary Details". The "Review Details" section includes fields for Review Name (00227794-Review Record), Status (In Progress), Owner (Ritha Choudhury-Rahman), and Case (00227794). The "Summary Details" section includes fields for Nurse Review Summary, Social Worker Review Summary, Summary of Recommendations, Summary of Grievance (with an information icon), and Testing Review. A dropdown menu for the Status field is open, showing options: Planning (selected with a checkmark), --None--, In Progress, and Completed.

Case	Status	Review Completion Date	Owner
00227794	In Progress		Ritha Choudhury-Rahman

Details Related

▼ Review Details

Review Name	00227794-Review Record	Owner	Ritha Choudhury-Rahman
Status	In Progress	Case	00227794
		Review Completion Date	

▼ Summary Details

- Nurse Review Summary
- Social Worker Review Summary
- Summary of Recommendations
- Summary of Grievance ⓘ
- Testing Review

Status

- Planning ✓
- None--
- In Progress
- Completed

Quality of Care Case Reviews

Nurse Reviewers

The screenshot shows a software interface with two main text input areas. The top area is titled "Summary of Recommendations" and contains a rich text editor toolbar with options for font (Salesforce Sans), size (12), color, bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, bulleted list, numbered list, link, image, and link removal (Ix). Below the toolbar is a large empty text box. The bottom area is titled "Summary of Grievance" and has an information icon (i). It also features the same rich text editor toolbar. Below the toolbar, the text box is pre-populated with text. At the bottom of the interface are two buttons: "Cancel" and "Save".

- Both the Nurse Reviewer and Social Worker may add recommendations
- The summary of grievance pre-populates based on the information provided in the Summary of Grievance field on the Case Details screen.

Quality of Care Case Reviews

Nurse Reviewers



- Once all the review steps are done, update the Status to Completed and add a Review Completion Date
- The case will then update with the Review Completion Date and a notification email will be sent to the Case Owner that the review is complete.

Review
00227794-Review Record

Case	Status	Review Completion Date	Owner
00227794	In Progress		Ritha Choudhury-Rahman

Details Related

▼ Review Details

Review Name	00227794-Review Record	Owner	Ritha Choudhury-Rahman
Status	In Progress	Case	00227794
		Review Completion Date	

▼ Summary Details

- Nurse Review Summary
- Social Worker Review Summary
- Summary of Recommendations
- Summary of Grievance ⓘ
- Testing Review



You must mark both the status as Complete AND add a date prior to saving to trigger the automation.

Quality of Care Case Reviews

Nurse Reviewers



A screenshot of a software interface for managing case reviews. The header shows 'Cases > 00213779' and 'Reviews'. Below the header, it says '2 items • Updated a few seconds ago'. On the right side, there are two buttons: 'New' (highlighted with a red box) and 'Change Owner'. Below these buttons are four icons: a gear (settings), a refresh symbol, a double-headed arrow (sort), and a funnel (filter). The main area contains a table with two rows of review items. Each row has a checkbox, a number (1 or 2), and a review name. The first row has a checkbox, the number '1', and the text 'PCU Case # 123456'. The second row has a checkbox, the number '2', and the text 'Test'.

- If a second review needs to be added to a case, either the Case Owner or the Nurse Reviewer may create a second Review by going into the Reviews related list on a case and clicking New.
- Complete the Review Name, Status, and Summary, work the Review as normal.



When creating additional Reviews on the Case, the Summary of Grievance will not auto populate. You will need to transfer this information over to the Review record manually. To assign this Review to another person, you will need to change the Owner of the Review Record.

Corrective Action Plans




Corrective Action Plans (CAP)



Case **00213779** ESRD - Log PCU Activity **Create Corrective Action Plan** Edit

- To add a Corrective Action Plan (CAP) to a Case, use the Create Corrective Action Plan button in the top right of the Case layout
- Enter the Corrective Action Plan Due Date, Corrective Action Plan Description, Task Description and Task Due Date
- Use the Add button to create multiple tasks associated with a single corrective action plan.
- Click Finish


Create Corrective Action Plan

* Corrective Action Plan Due Date 
Complete this field with format MMM d, yyyy.

* Corrective Action Plan Description

Corrective Action Plan Task


* Task Description

* Task Due Date 

Remove

+ Add

Finish

 It is a Best Practice to use a Department Standard Naming Convention for your description for improved reporting metrics

Corrective Action Plans (CAP)



Related List Quick Links ⓘ

[Notes \(1\)](#) [Reviews \(1\)](#) [Performance Improvement Plans \(2\)](#) [Related Cases \(0\)](#) [Open Activities \(6\)](#) [Activity History \(4\)](#) [Case History \(10+\)](#)

[Work Plans \(2\)](#)

[Case Details](#) [Case Resolution](#) [Activity Log](#) [Related List](#) [Files](#)

Performance Improvement Plans (1) [New](#)

Performance Improvement Plan Name	Status	
PIP-00017	Open	▼

[View All](#)

- Multiple CAPs can be created per case
- To View Corrective Action Plans in the Related List Quick Link or Related List tab of the Case under the title Performance Improvement Plan.
- Click the Performance Improvement Plan link to see the details.

Corrective Action Plans (CAP)



The screenshot displays the 'Performance Improvement Plan' interface for 'ESRD - Corrective Action Plans'. It features a top navigation bar with 'Edit' and 'Delete' buttons. Below this is a table with columns for Account, Case, Status, and Due Date. The main content area is divided into three sections: 'Details', 'Corrective Action Plan Tasks (2)', and 'Corrective Action Plan Summary'. The 'Details' section includes fields for Status (Open), Due Date (6/5/2025), Case (00213779), and Description (PCU # 123456). The 'Facility Information' section lists Account (DaVita Floral Park Home Dialysis (PD)), Facility ID (2100015407), and ID CCN (332750). The 'Corrective Action Plan Tasks (2)' section shows a table with columns for Task, Due Date, and Status. The tasks listed are 'Patient Education on Communication Techniquist' (due 6/12/2025) and 'Staff Education on Patient Centered Approach' (due 7/7/2025). The 'Corrective Action Plan Summary' section includes a 'PIP Task Summary' and a 'PIP Tasks Outcome Summary'.

Account	Case	Status	Due Date
DaVita Floral Park Home Dialysis (PD)	00213779	Open	6/5/2025

Task	Due Date	Status
<input type="checkbox"/> Patient Education on Communication Techniquist	6/12/2025	Open
<input type="checkbox"/> Staff Education on Patient Centered Approach	7/7/2025	Open

Account	Facility ID
DaVita Floral Park Home Dialysis (PD)	2100015407
Also Known As	ID CCN
DaVita Floral Park Home Dialysis (PD)	332750

PIP Task Summary	PIP Tasks Outcome Summary
<ul style="list-style-type: none">• Patient Education on Communication Techniquist - due on June 12, 2025• Staff Education on Patient Centered Approach - due on July 7, 2025	This work was completed. See file on outcome data

When you open the Corrective action plan, you can see related Case details, the tasks that are assigned to the facility and any summary information that was created.

You can add New Tasks, Delete incorrect tasks, Edit an existing task to include Outcomes, and update any summary as needed.

Part 4: Long-term Storage with Box

Using Box to Support Hard Copy Mailings



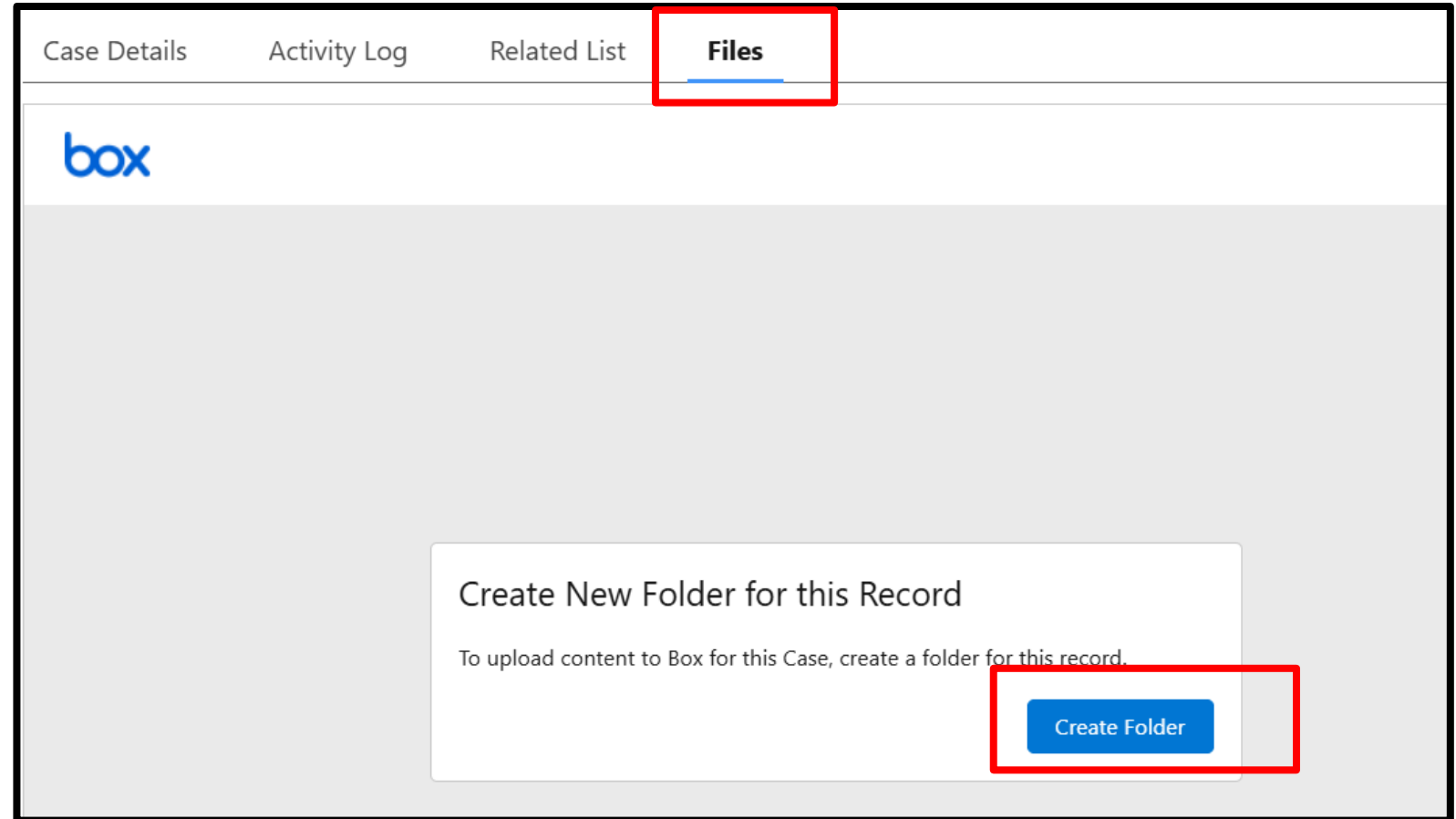
- Work plan tasks have been added for the Sending Acknowledgement Letters and Resolution Letters
- A new activity should be created for other types of tasks that require sending or receiving information and assigned to Program Support who will support the task. These types of activities include:
 - Patient Representative Forms
 - Educational Resources
 - Other Hard copy materials
- Letters or other information that needs to be mailed should be uploaded to Box.
- Program Support can review tasks from their home screen, navigating to the case to access and print hard copy materials.
- Once a task is completed, mark the task as complete.

NOTE: Program Staff may upload documents to Box and create a Task assigning it to the Patient Service staff to capture the receipt of signed documents like the Patient Service Representative form.

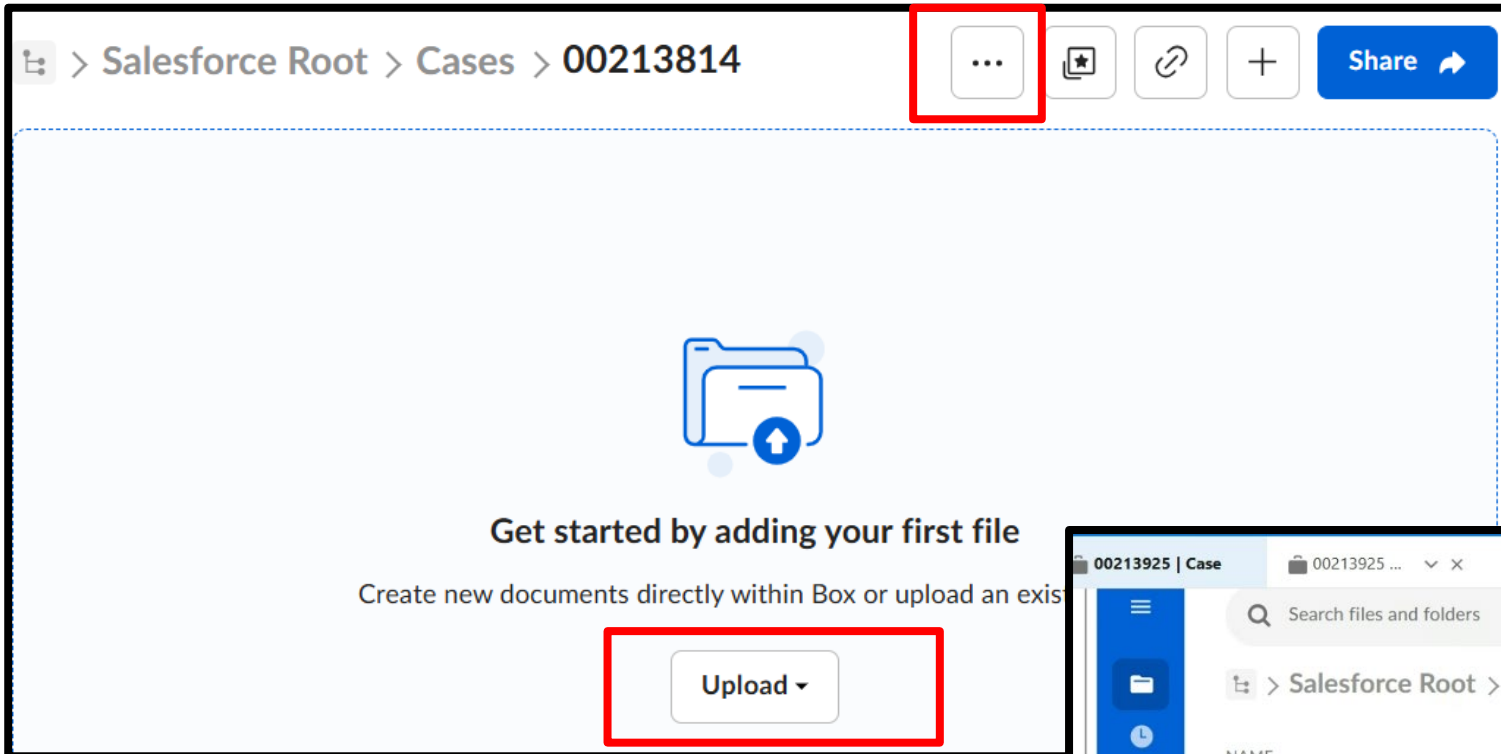
Storing Case Documentation



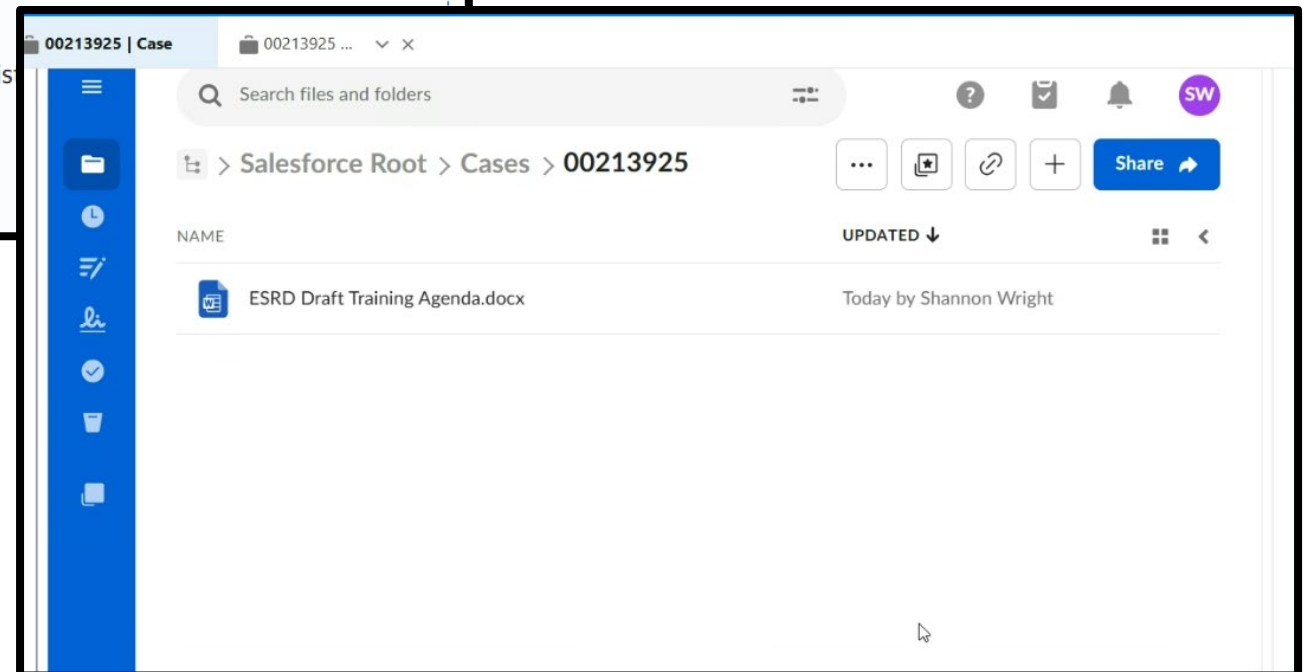
- For the storage of physical documents, IPRO uses a tool called BOX
- After creating Acknowledgement and Resolution letters, or any other document, you can attach the letter to the case record via Box.
- Navigate to the Files section on the case.
- Select Create Folder



Storing Case Documentation

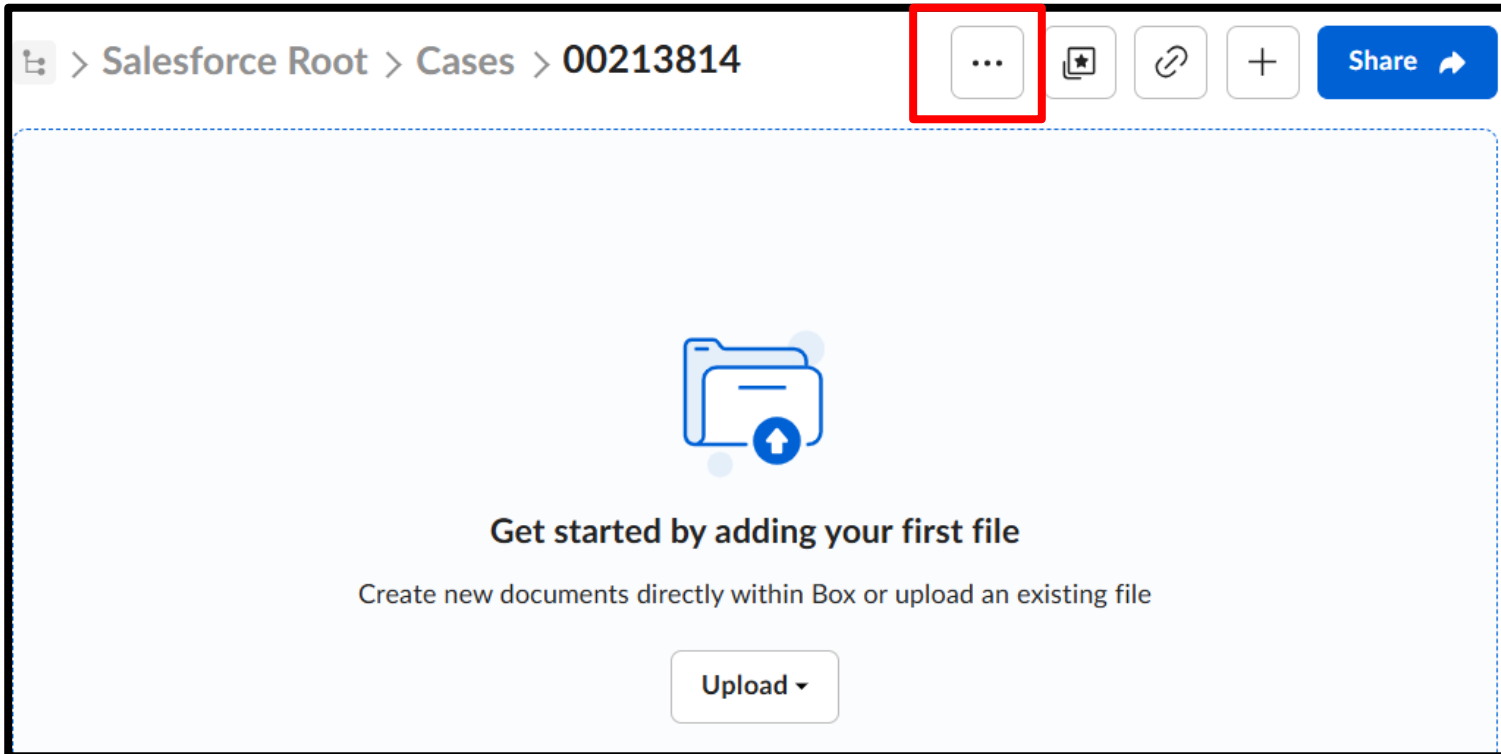


From this screen you can upload any letter or document that you may already have by selecting upload and choose your file

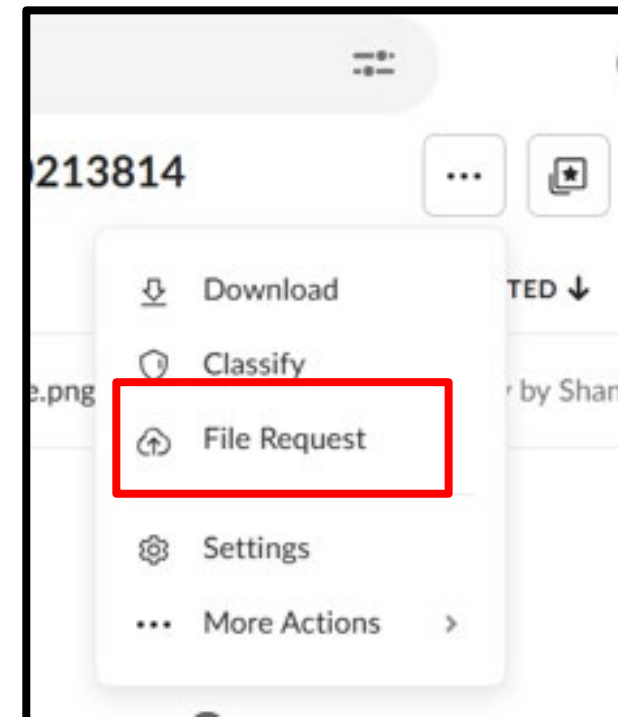


Refresh the screen and the file will be available to access from within Salesforce.

Secure Data Transfer of information from Facilities



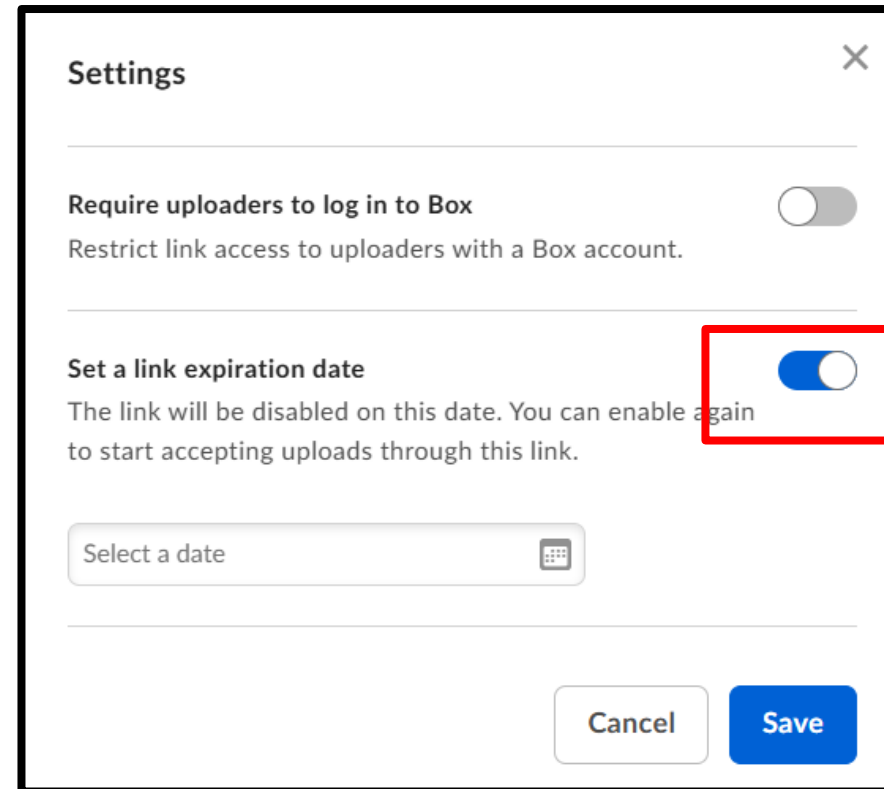
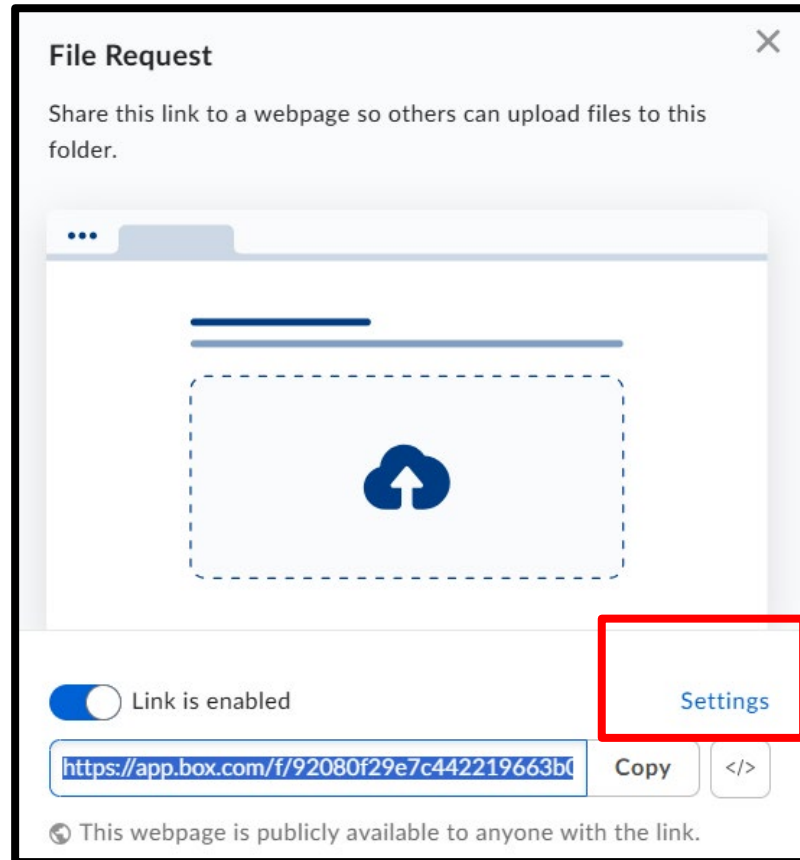
You can also generate a secure external link to send to a facility via email by going to the 3 dots and selecting File Request



Secure Data Transfer of information from Facilities



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

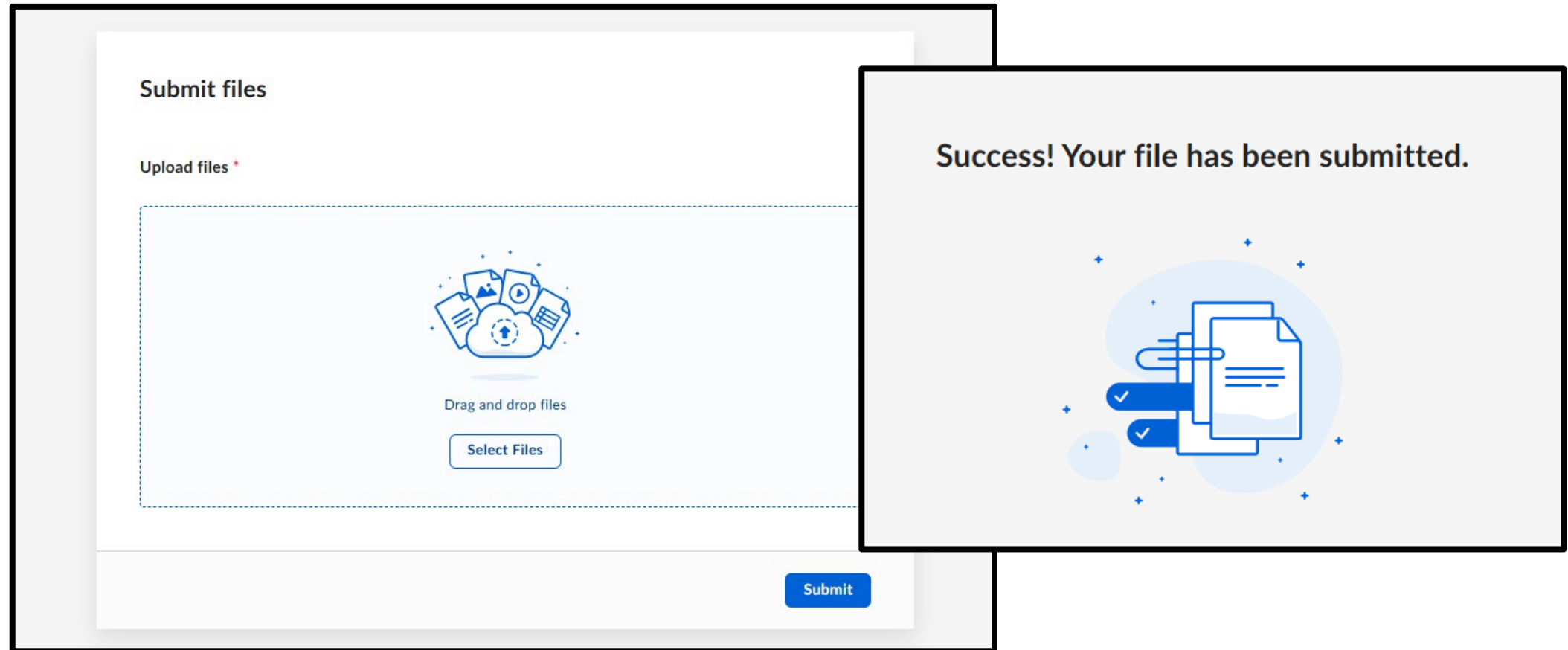


Once your expiration is set, copy the link and move over to your Case record. Create an Email or use an Email Template and insert the link for the facility to use

Obtaining a Facility Document



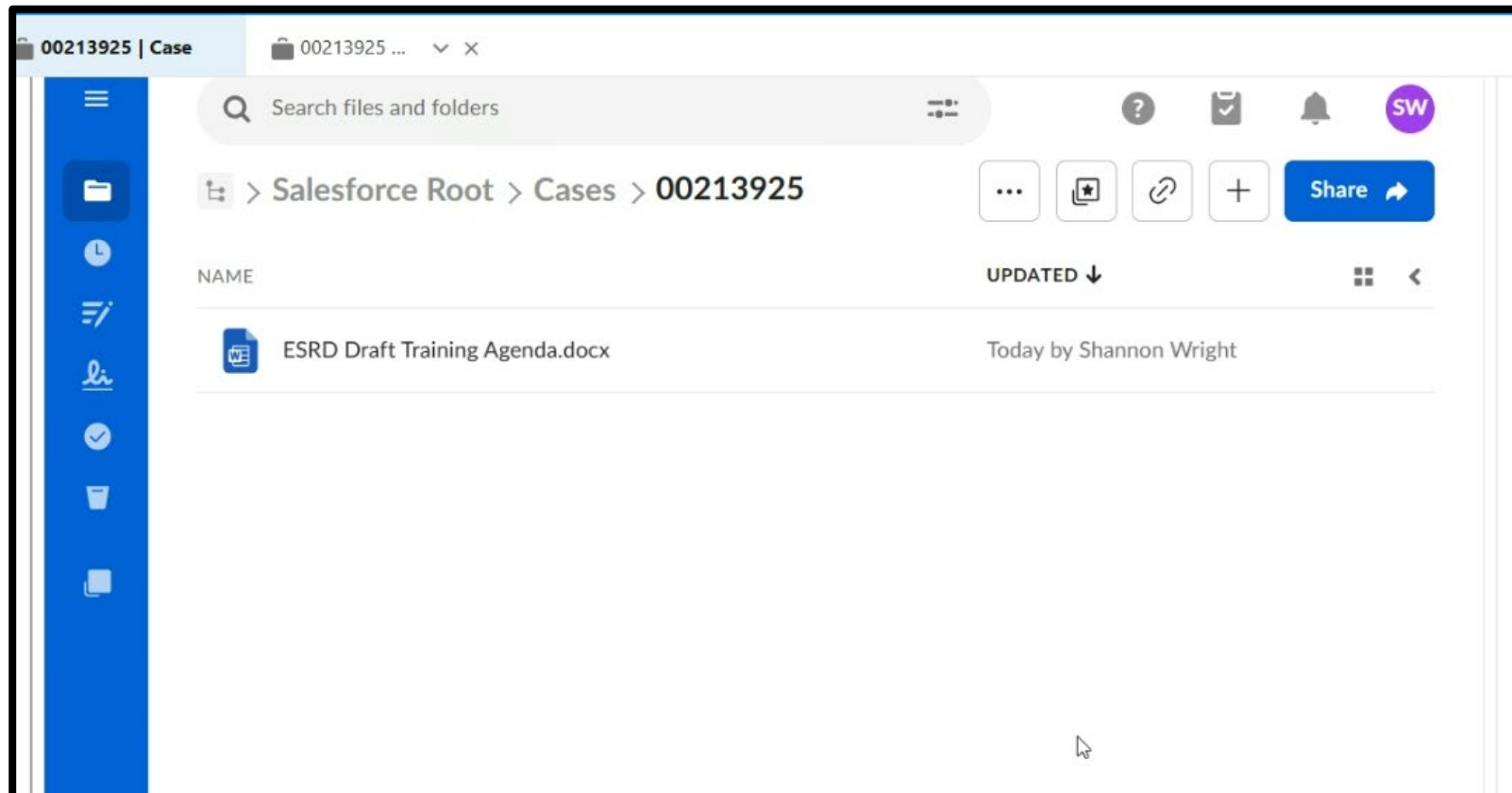
When the facility opens the file request link, they will be prompted with a Box screen to upload the file and submit. Once the file is submitted, the facility cannot retrieve or access the file. They will receive a screen notification when the file is uploaded successfully



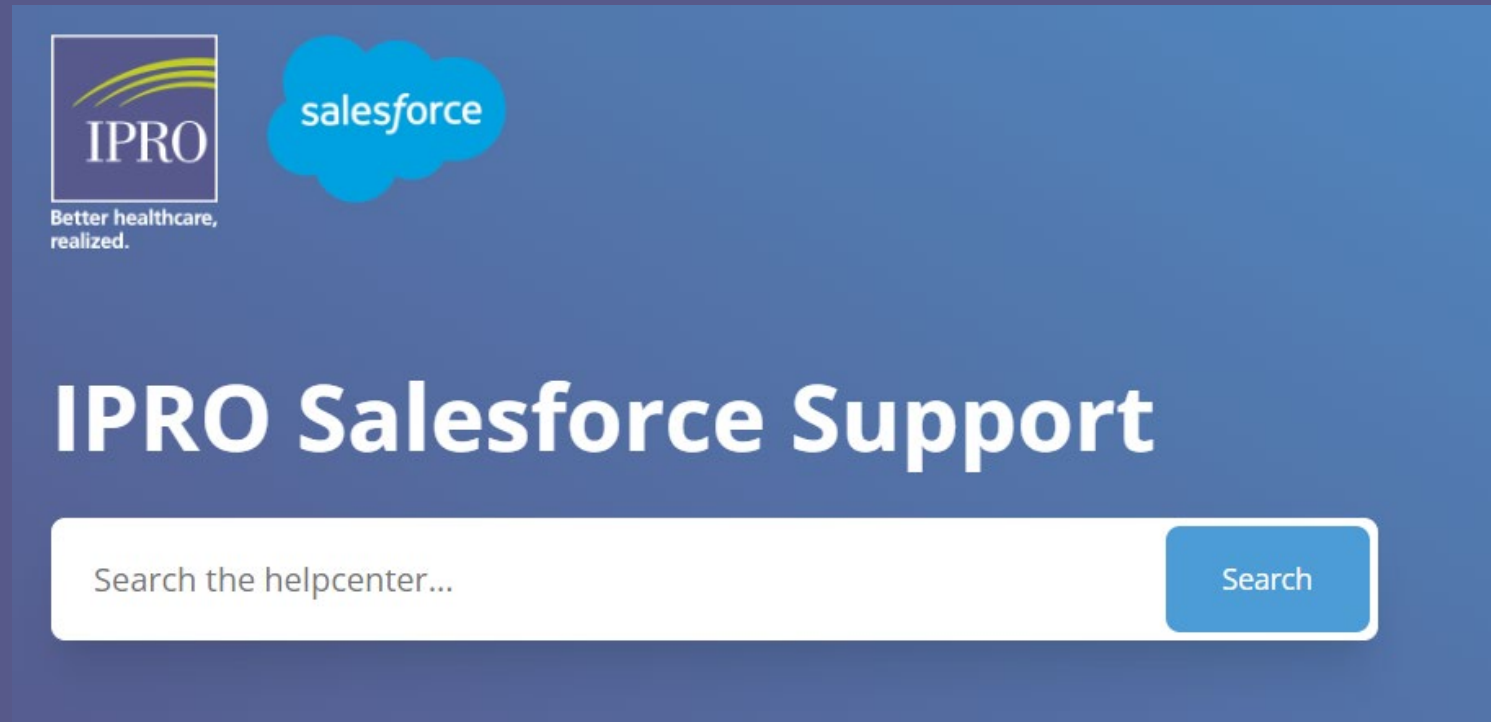
Obtaining a Facility Document



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



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. In the center, the text "IPRO Salesforce Support" is displayed in a large, bold, white font. Below this text is a white search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button to its right.



Corporate Headquarters
1979 Marcus Avenue
Lake Success, NY 11042-1072

<http://ipro.org>

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

Appendix 1: Patient Services Example Activities

Activity Tracking



On the case record, you can track activities related to the case including:

- Logging a Call
- Creating a New Task for yourself or other team members
- Creating and Sending emails either self generated or using email templates

The screenshot displays the IPRO case record interface. The left pane shows case details under the 'Case Details' tab, including a patient summary and reporter/patient information. The right pane, titled 'Activity', is highlighted with a red box and contains buttons for 'Log a Call', 'New Task', and 'Email'. Below these buttons is a text input field for 'Recap your call...' and an 'Add' button. Further down, there are filter options for 'All time', 'All activities', and 'All types', along with 'Refresh', 'Expand All', and 'View All' links. A section titled 'Upcoming & Overdue' lists two tasks: '3. Enter Case to PCU' and '1. Send Patient Representative For...', both due on 'Apr 7'. A 'View More' button is located at the bottom of this section.

Case Details Case Resolution Activity Log Related List Files

▼ Patient Services Case Summary

Case Owner: Shannon Wright
Case Number: 00213717
Network PCU Agent: Agata Roszkowski NW1
PCU Case Number
Initiation Date: 4/6/2025
Days Open: 46

▼ Reporter / Patient Details

Reporter Permission: Anonymous
Reporter Name
Reporter Type
Patient Permission: Anonymous
EQRS UPI
Patient First Name

Activity

Log a Call New Task Email

Recap your call... Add

Filters: All time • All activities • All types
Refresh • Expand All • View All

▼ Upcoming & Overdue

- > 3. Enter Case to PCU Apr 7
You have an upcoming task
- > 1. Send Patient Representative For... Apr 7
You have an upcoming task

View More

Activity Tracking

Workplans

- Work plan tasks are pre-defined activities related to the case type you are working on
- To complete or cancel a task, check the box to the left of the task
- Select Completed or Cancelled from the popup screen and click save
- The task will show as completed using a strikethrough



TIP: The Activity history of all tasks are available in the Related List Quick Links section of the case

The screenshot shows the 'Activity' page with a 'Choose Status' popup. The popup has a title 'Choose Status' and a section 'Select a Status' with two radio buttons: 'Completed' and 'Cancelled'. There are 'Cancel' and 'Save' buttons at the bottom of the popup. The background shows a task list with a task '3. Enter Case to PCU' and a date 'Apr 7'.

The screenshot shows the 'Upcoming & Overdue' section. It contains two tasks:

- Task 1: 3. Enter Case to PCU (strikethrough) Apr 7
- Task 2: 1. Send Patient Representative For... Apr 7


Both tasks have a 'You have an upcoming task' message below them. A 'View More' button is located at the bottom right.

Activity Tracking

Re-Assigning a Workplan Task








- To reassign a work plan task, click on the task.
- Edit the Assigned To field to re-assign the task. The person the task is reassigned to will receive a notification of the assignment and the tasks will show on their personal task list.

 Task

1. Send Patient Representative Form via hard copy (Assign to Program Support)

Name Related To
[00213717](#)

Details Related

Assigned To	 Shannon Wright 	Status	Not Started
Subject	1. Send Patient Representative Form via hard copy (Assign to Program Support) 	Name	
Due Date	4/7/2025  	Related To	00213717

Activity Tracking

Logging a Call



You can log a call related to call by capturing the

- Subject
- Add any notes related to the call in the comments section
- The case the call is related to will prepopulate when capturing this information from the case

Activity

Log a Call New Task Email

Subject

Comments

Tip: Type Control + period to insert quick text.

Name

Related To

Save

Activity Tracking

Creating a New Task

- Capture the task activity in the Subject line
- Add a Due Date, if the task is completed the due date should be listed with the date the task was performed
- The Assigned To field defaults to the case owner, you can change the owner to a different team member and they will receive notification of the assignment
- The case the call is related to will prepopulate when capturing this information from the case
- Use the status field to capture: Not Started, Completed or Cancelled
- Add any notes related to the task in the comments field
- Set a priority, the default is normal

Activity

Log a Call New Task Email

Subject

Due Date

* Assigned To
Shannon Wright

Name

Related To
00213781

* Status
Not Started

Comments
Tip: Type Control + period to insert quick text.

* Priority
Normal

Save



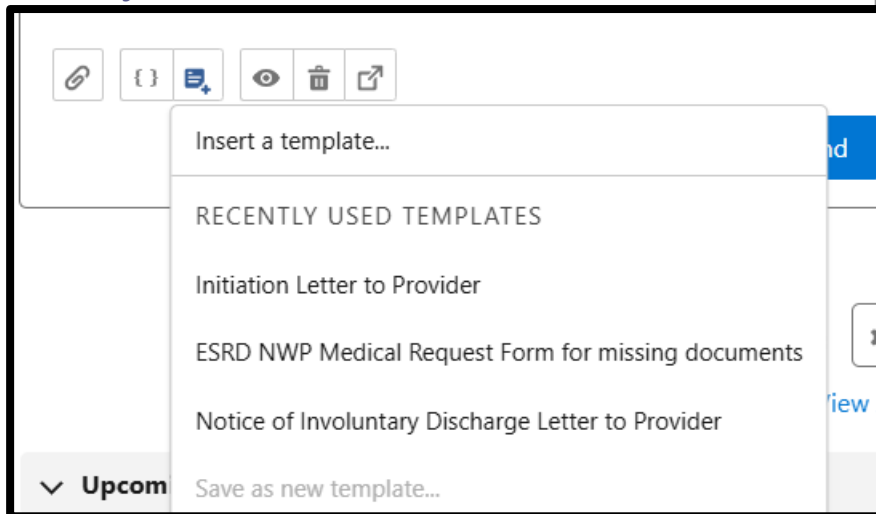
Activity Tracking

Creating an Email



Send emails from the case

- From is auto-populated with the case owner information
- Add email addresses in the To Field (Note: CC and BCC functionality is disabled)
- The subject line will pre-populate based on the case subject naming convention, this can be changed as needed
- Type the content of your email or select a template



Activity

Log a Call New Task Email

From: Shannon Wright <swright@ipro.org>

To: 👤 Cc Bcc

Subject: Network 1 - General Grievance

I_x **A** **A** **B** **I** **U** **S**

Font Size Format

Send

Activity Tracking

Working with Email Templates

- When using an email template, review the content pre-populated.
- Information highlighted in yellow should be customized by the sender to reflect the needs of the email you are sending.

A screenshot of an email composition window titled "Initiation Letter to Provider". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. The main content area is enclosed in a dotted border and contains the following elements:

- Header:** The IPRO logo on the left and the text "End-Stage Renal Disease Network Program" on the right.
- Body:** A series of placeholder tags: {{{Case.Today_f__c}}}, {{{Case.Contact_Name__c}}}, {{{Case.Also_Known_As__c}}}, and {{{Case.Account_Location_Address__c}}}.
- Subject:** **RE: Filing of Grievance**
- Salutation:** Dear {{{Case.Contact_Name__c}}}:
- Text:** IPRO ESRD Network of **New England, New York, South Atlantic, Ohio River Valley** is the End Stage Renal Disease Network. The text "New England, New York, South Atlantic, Ohio River Valley" is highlighted in yellow.

At the bottom of the window, there is a toolbar with icons for attachments, code blocks, comments, and a preview icon. Below the toolbar, a red folder icon is followed by the text "00213781". A blue "Send" button is positioned in the bottom right corner.

Reviewing Activities

- Upcoming activities are available and completed activities are tracked within the Activity widget
- You can also see a complete list of activities captured by clicking the Related Links Activity History



▼ Upcoming & Overdue

- ☰
 Send Patient Acknowledgement Let... Apr 18
- [Shezeena Andiappen](#) has an upcoming task
- ☰
 Create Patient Acknowledgement L... Apr 17
- [Shezeena Andiappen](#) has an upcoming task

[View More](#)

▼ May • 2025 This Month

- ✉
Initiation Letter to Provider
9:18 AM | Today
- [swright@ipro.org](#) sent an email to [Shannon Wright](#)

Cases > 00213781

Activity History

5 items • Sorted by Date • Updated a few seconds ago

#	Subject	Duration	Activity Dat...	Completed ...	Status	Activity Sub...	Work Plan
1	Call			5/22/2025, 9:19 ...	Completed	Task	
2	Email: Initiation Letter to Provider			5/22/2025, 9:18 ...	Completed	Email	
3	Coached on Communication Techniques	3	4/16/2025, 3:47 ...	4/16/2025, 3:47 ...	Completed	Call	
4	Mental health Eval and Follow Up	2	4/16/2025, 3:47 ...	4/16/2025, 3:47 ...	Completed	Call	
5	Coached on Communication Techniques	1	4/15/2025, 3:47 ...	4/16/2025, 3:47 ...	Completed	Call	