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

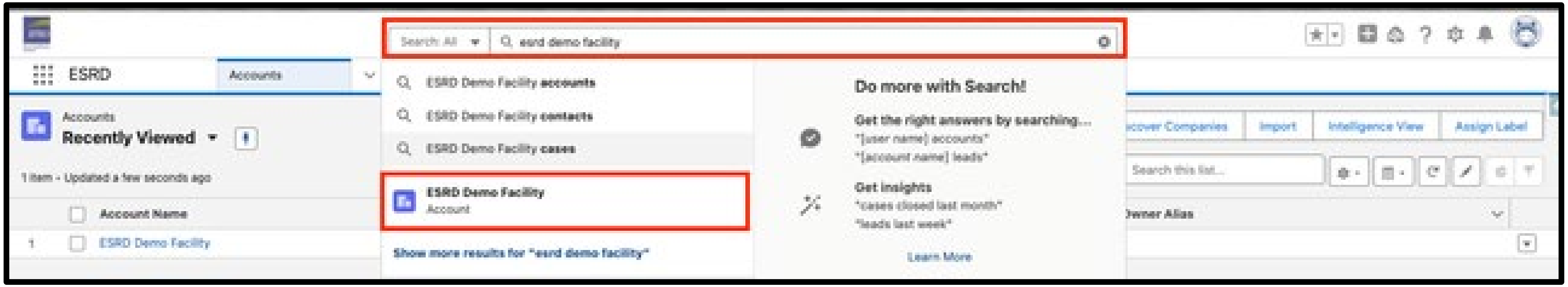
This training will help you complete the following actions:

- 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

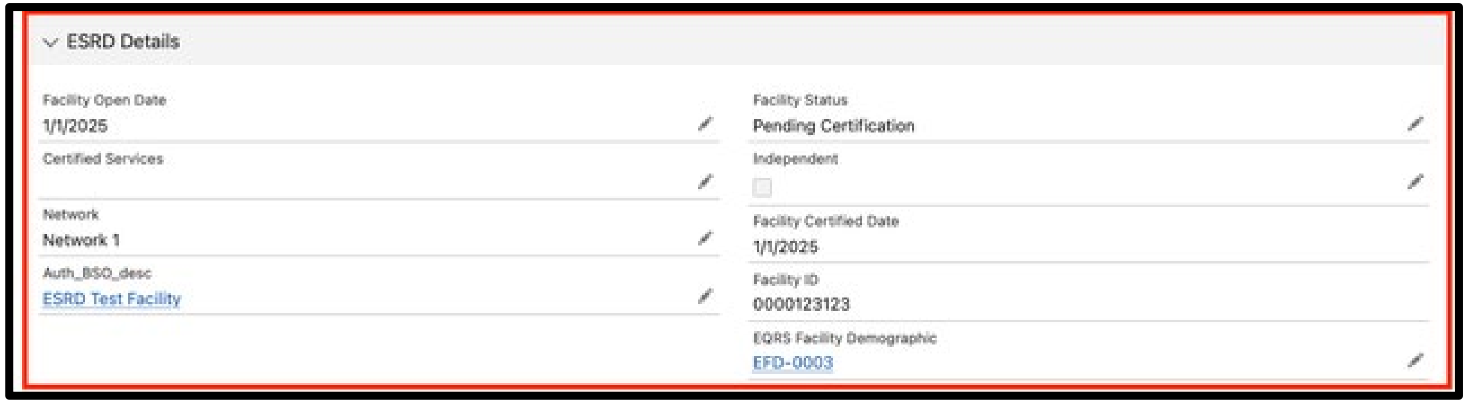
Searching for a Record in Salesforce

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.

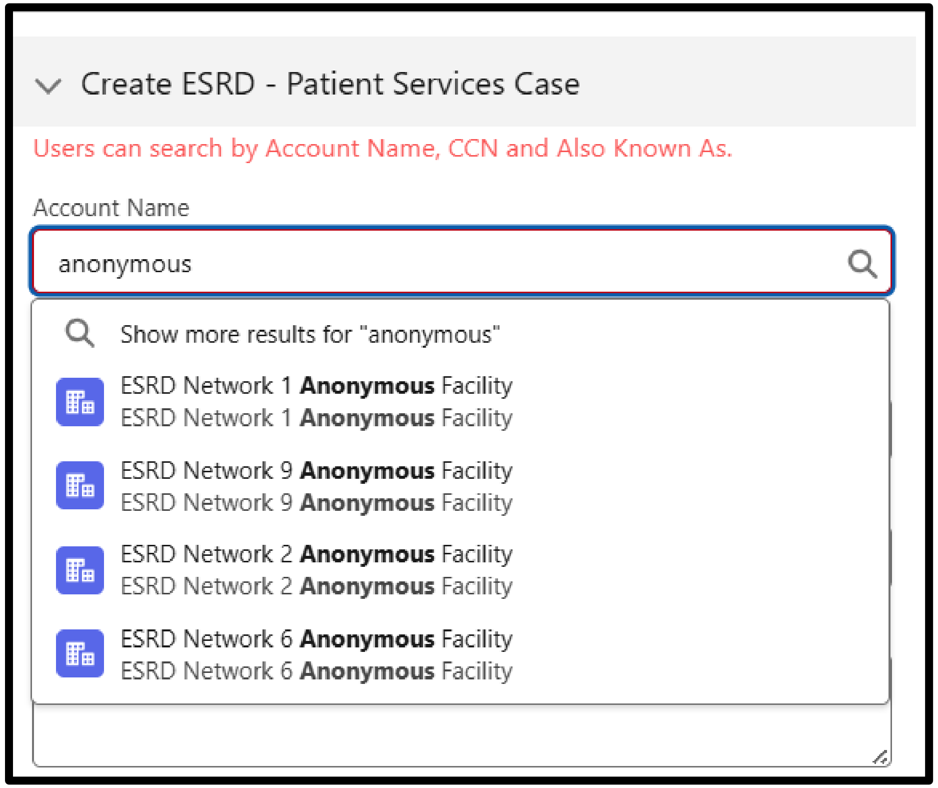
If the account does not exist, follow your department procedure for creating new facilities, health systems, community organizations, or other account types



Patient Service Accounts

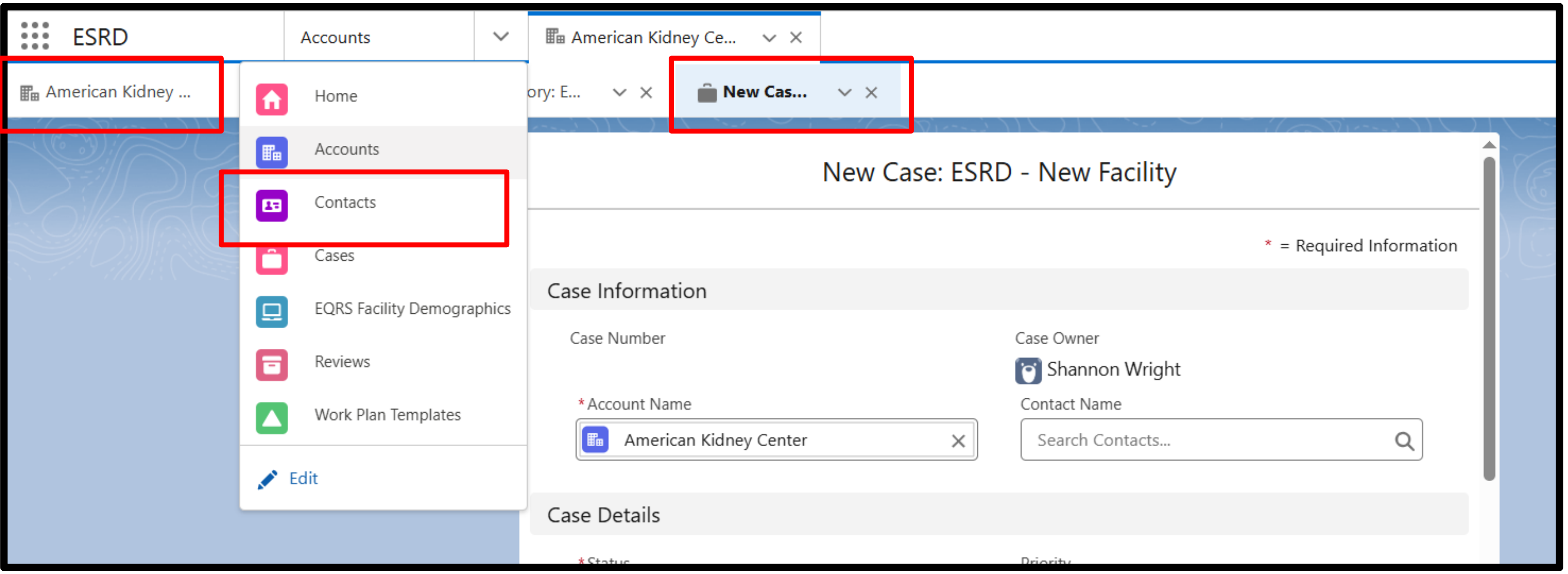
Unique Account Cases

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.

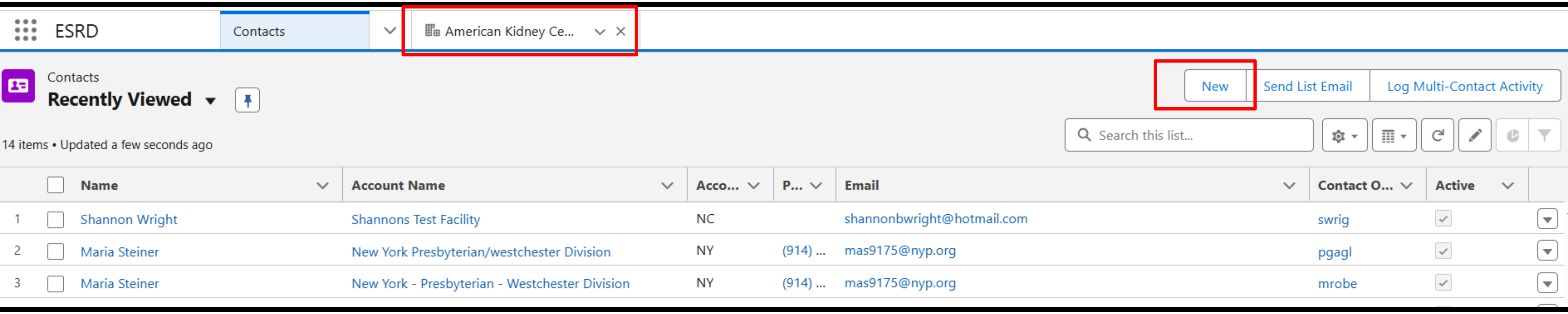


If you are working a grievance case with an Acute care hospital that is not already in Salesforce and need to create a new account, use the American Hospital Directory link to find the CCN/TIN information to create the hospital account. https://www.ahd.com/search.php

Creating a New Contact

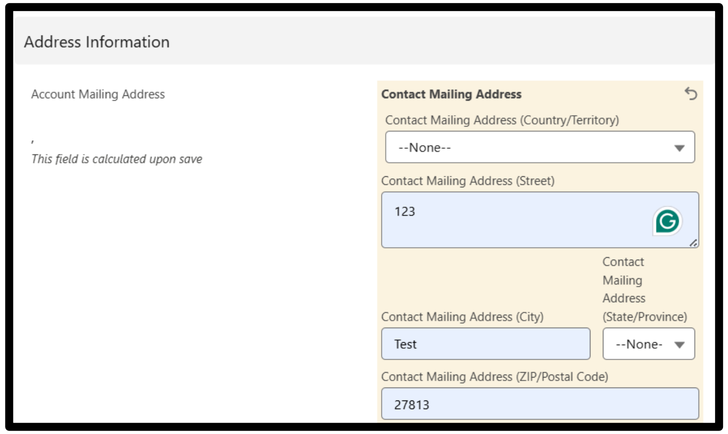


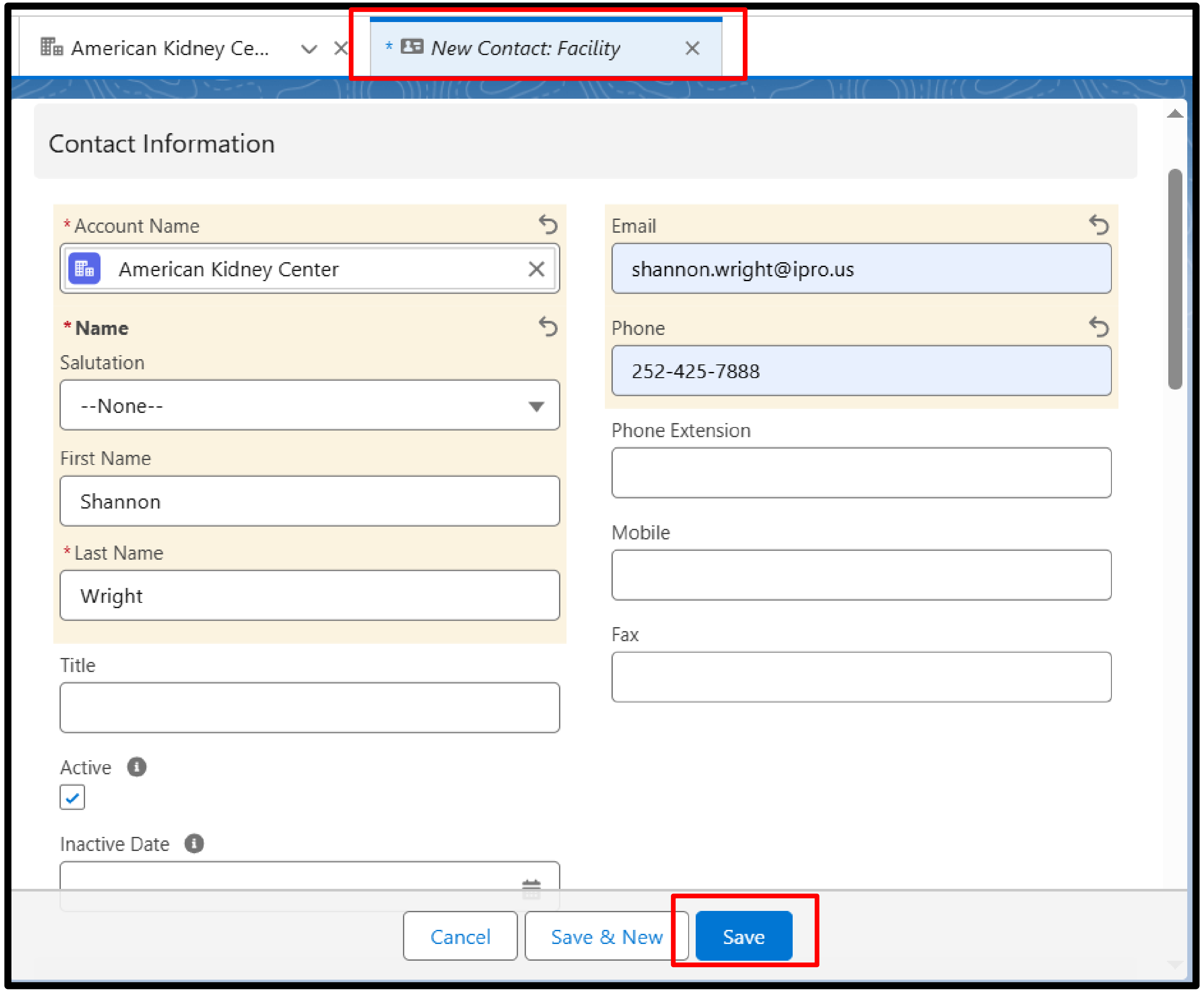
- Before adding a new Contact, use the search to see if the record already exists. If it does not, create new
- From the dropdown, Select Contacts
- Select New to create a new Contact
- **Note:** A separate tab is created, the American Kidney Center Case Tab and Account tab are still available



Creating a New Contact

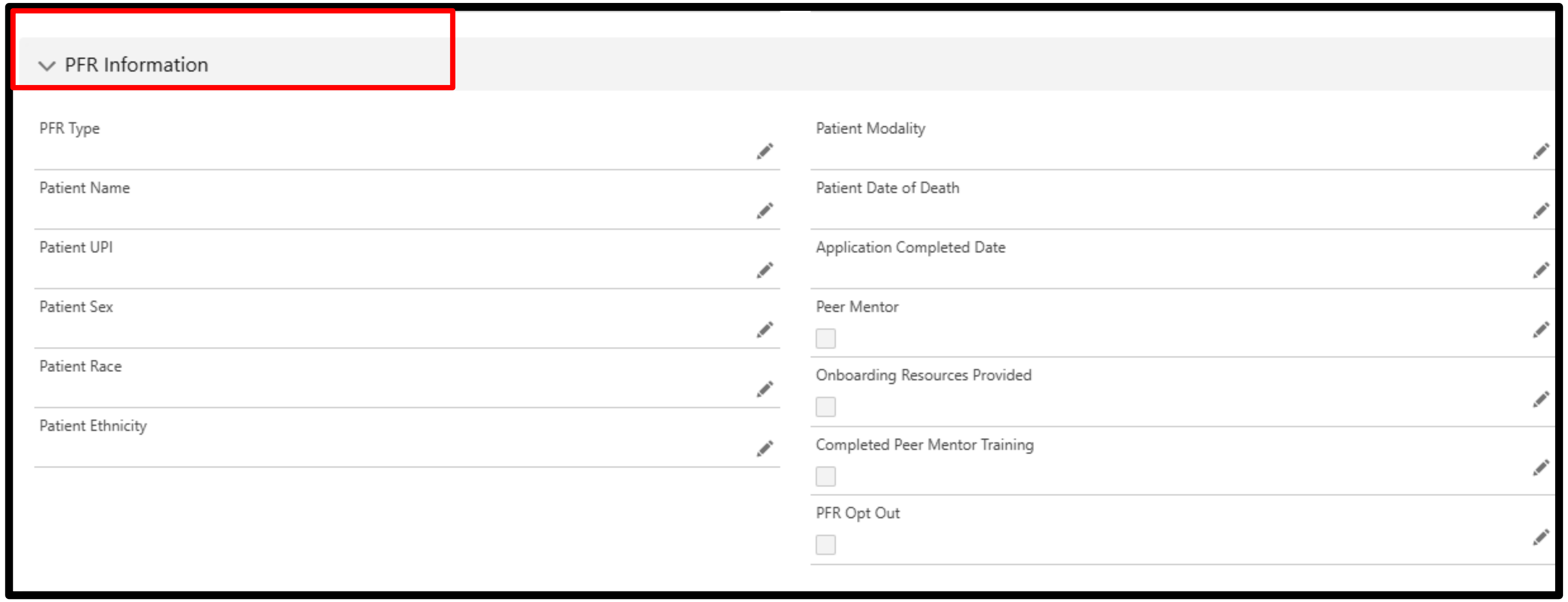
- Search for the Account Name to be assigned to the Contact
- Enter the Contact information
  Note: Name and either phone or email is required.
- The Address section is optional
- Click Save





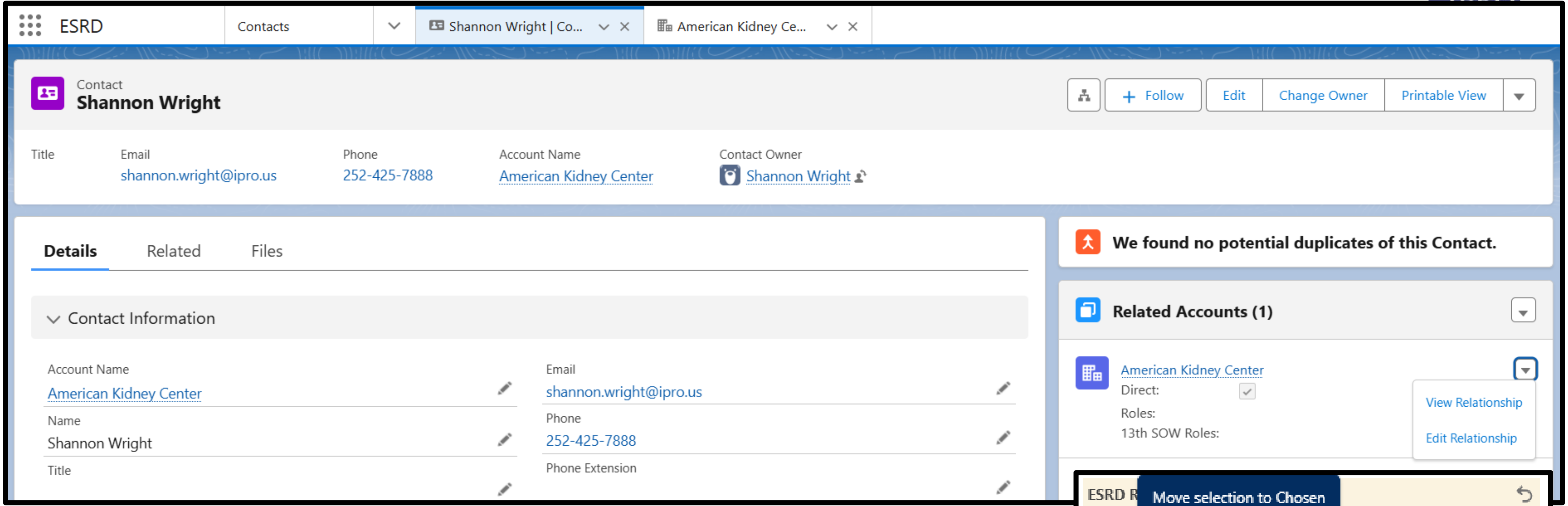
Creating a New Contact

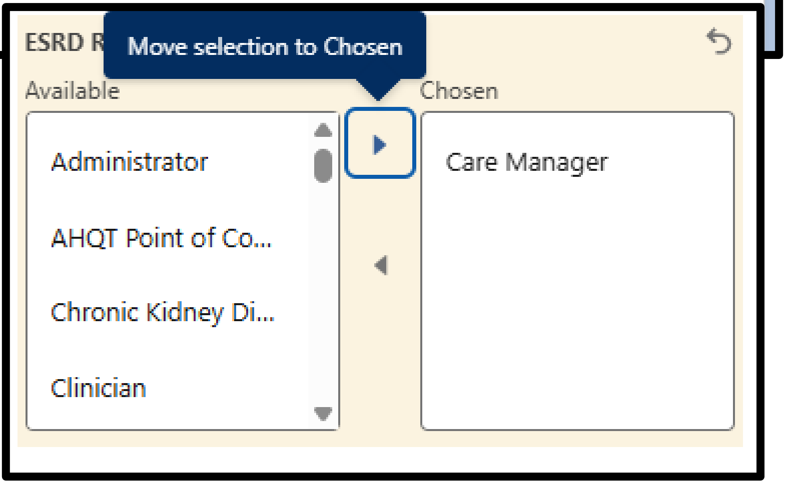
- If your contact is a Patient Facility Representative (PFR), add the appropriate details under the PFR Information section on the Contact Record



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

Creating a New Contact



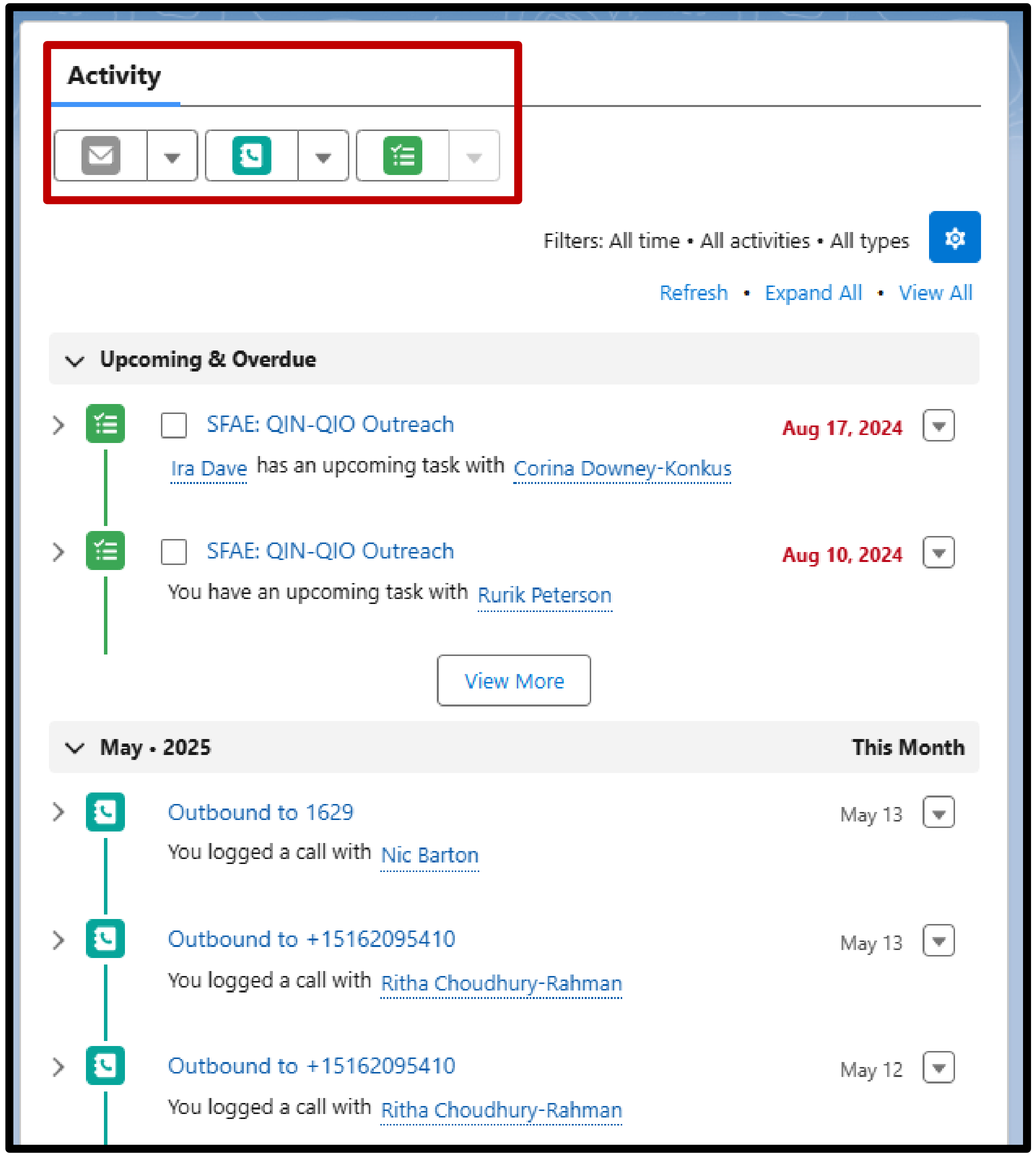


- From the newly created contact record, add the role(s) of the contact by selecting the Add Relationship in the Related Accounts section
- Scroll until you see your department's list and select the role(s) to assign to the Contact and Save the record
- Click Save

Activity Tracking

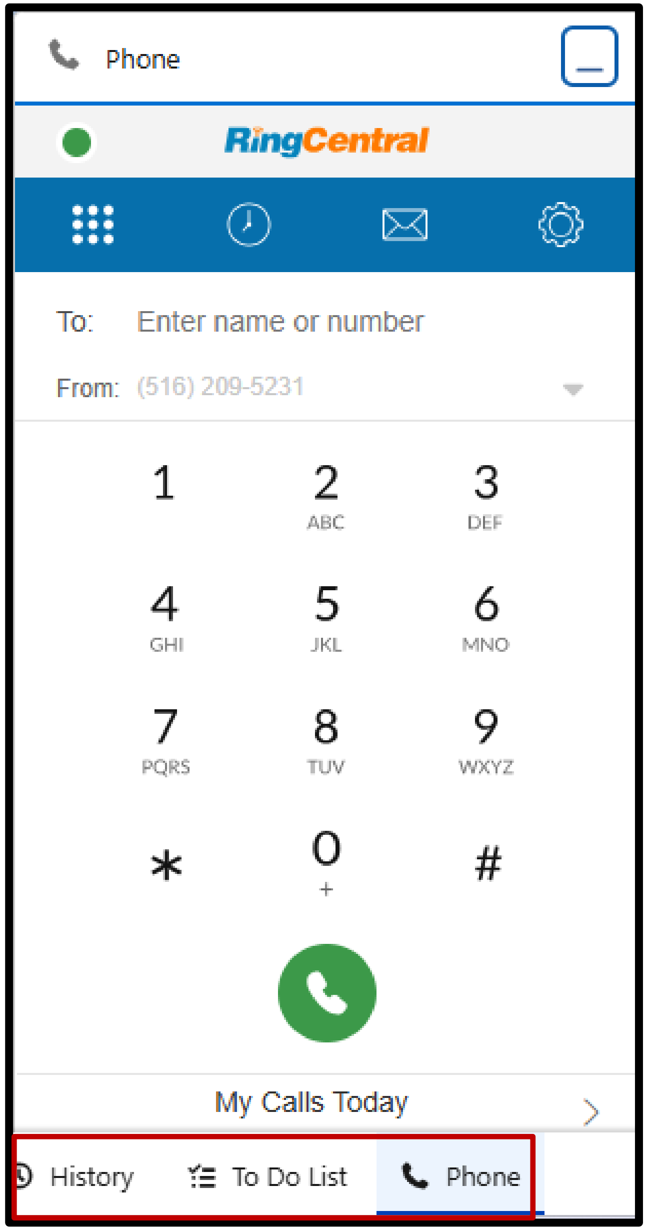
- The Activity Panel is where you can create an email, detail a completed phone call, or log a future or completed task. The panel might look different depending on the Salesforce object you are in
- Activities relate to the record they are attached. It is important to remember visibility when creating 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.



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.

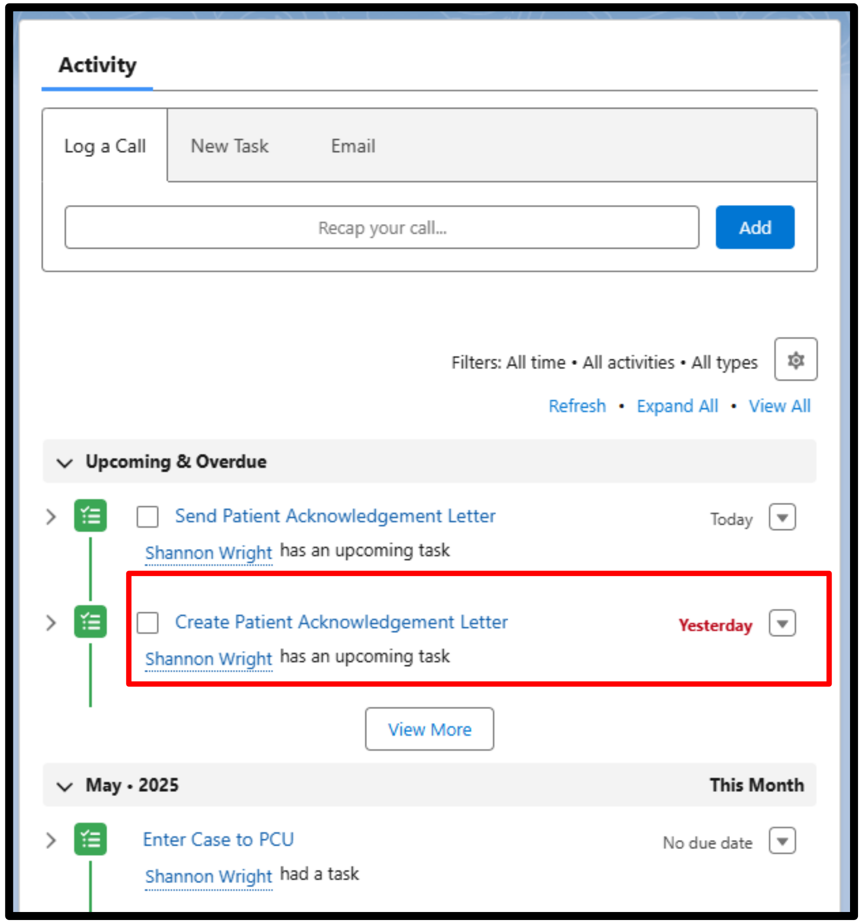
Outlook and Salesforce can be connected to capture a copy of emails sent to providers, facilities, hospitals, or other IPRO clients allowing for future reference or deliverable reporting.

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

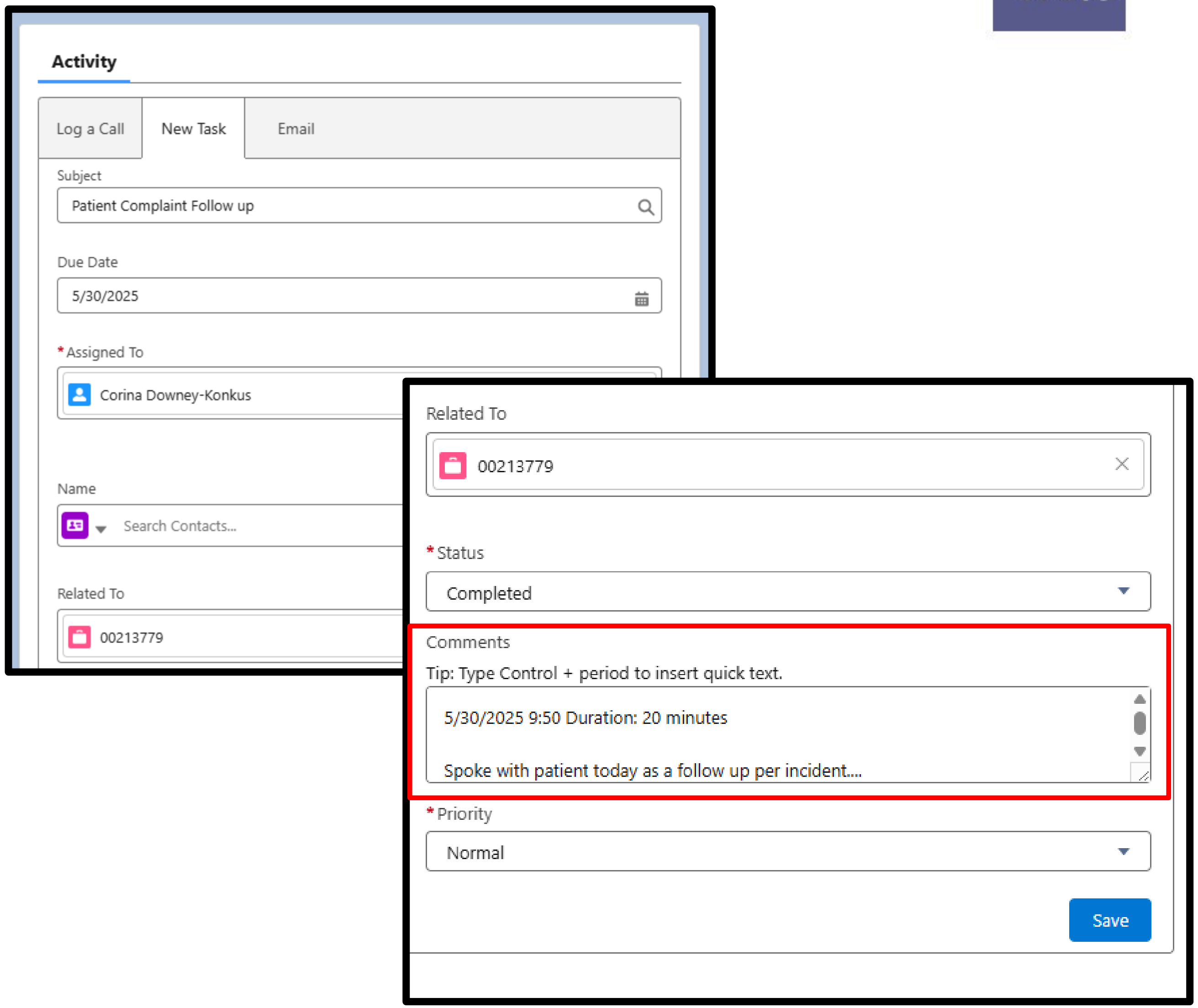
Workplans: A Preset Task Series

- 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



Documenting Tasks for PCU

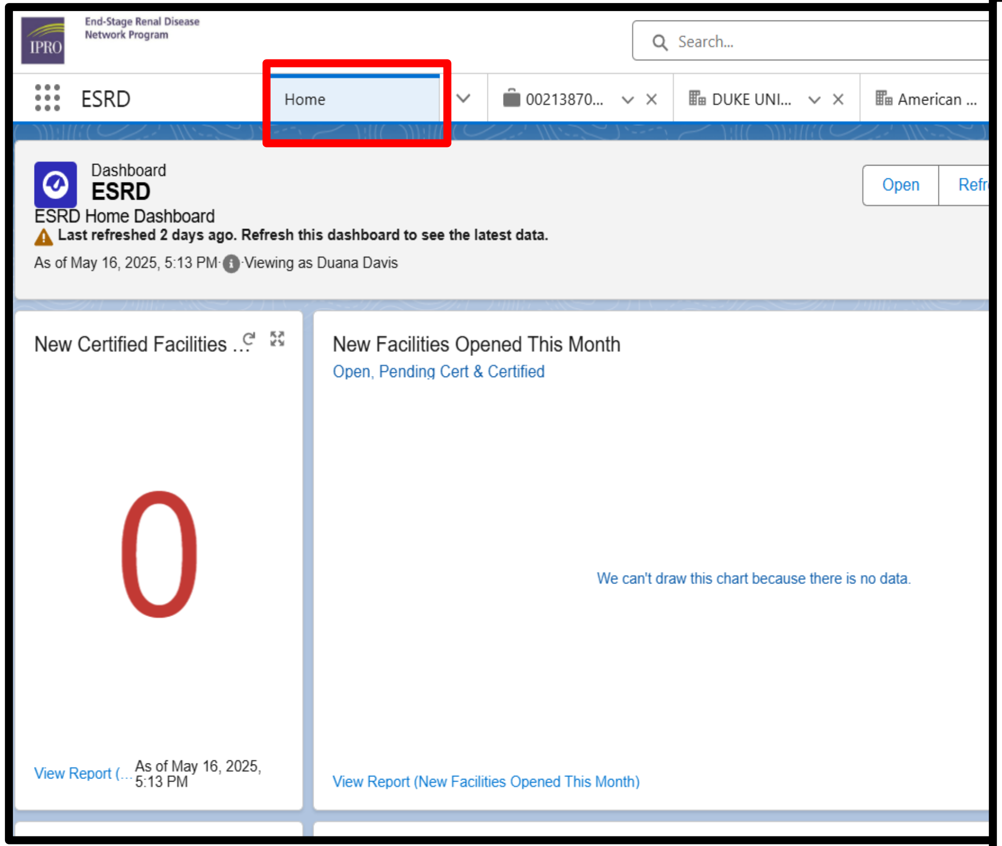
- Patient Services requires accurate Task recording to update the PCU database per contract
- When creating/updating Tasks, it is a recommended process to start the Task Comment with the date/time/duration spent on the first line of the comment so that it is reported correctly
- When the Task is a Patient 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

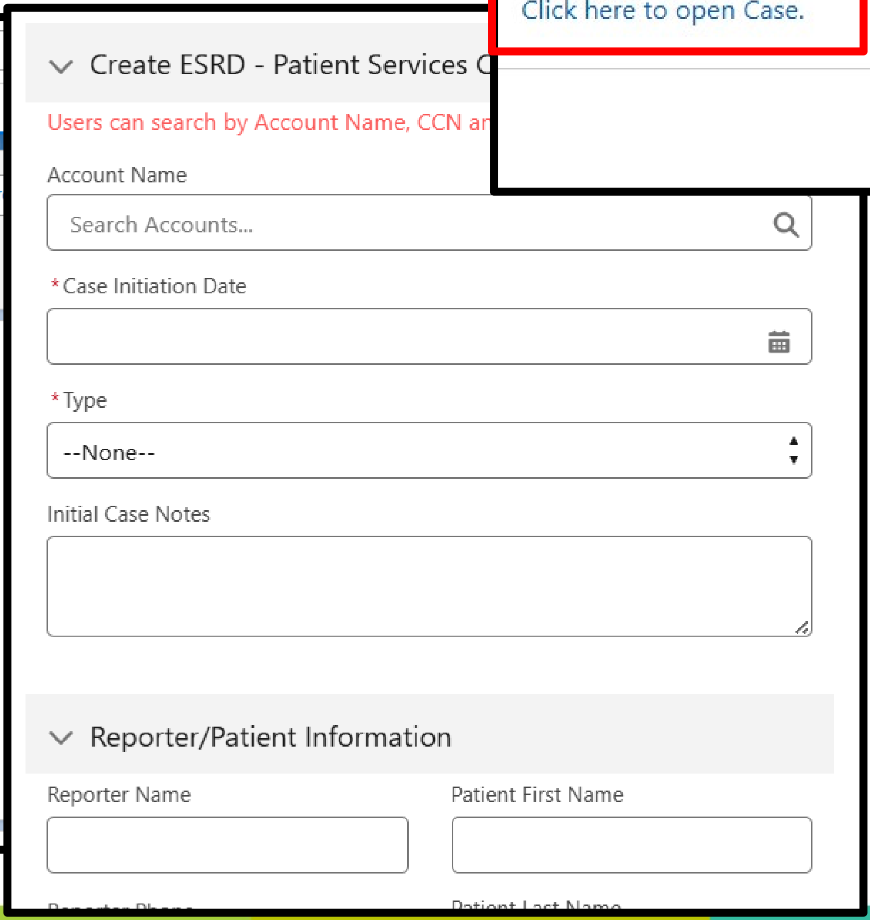


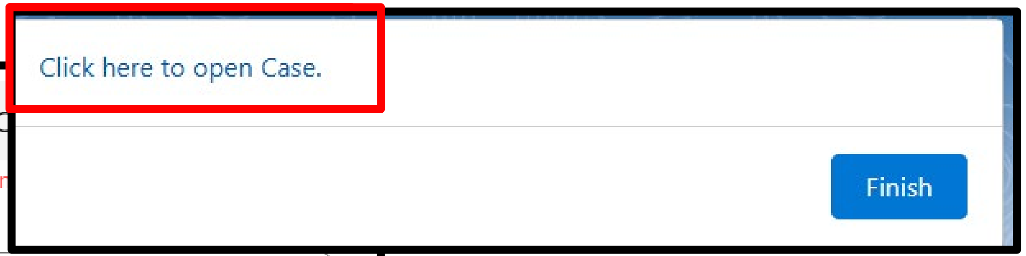
Part 2:
Creating a Case

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







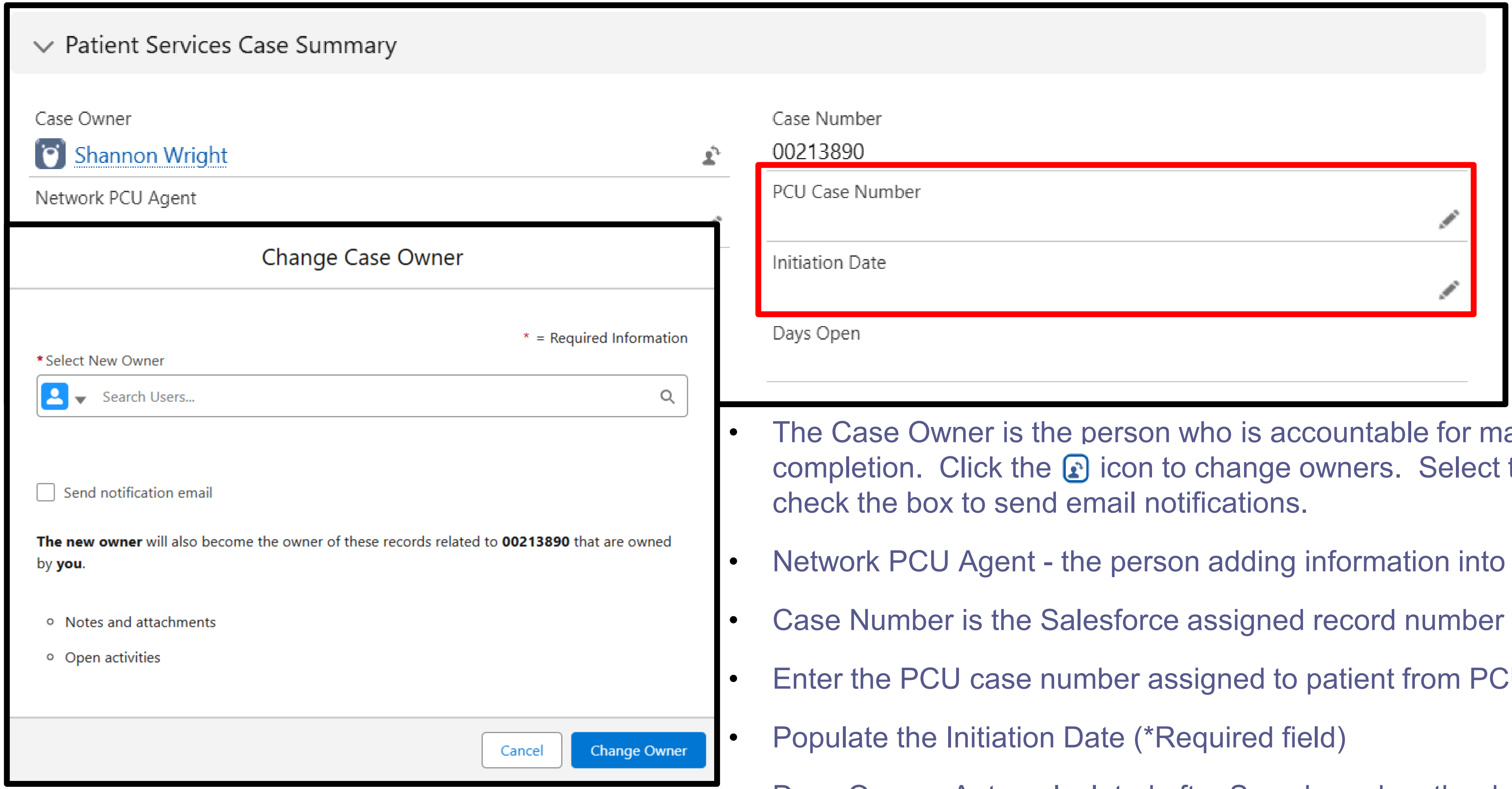
Additional details can be optionally added:

- 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

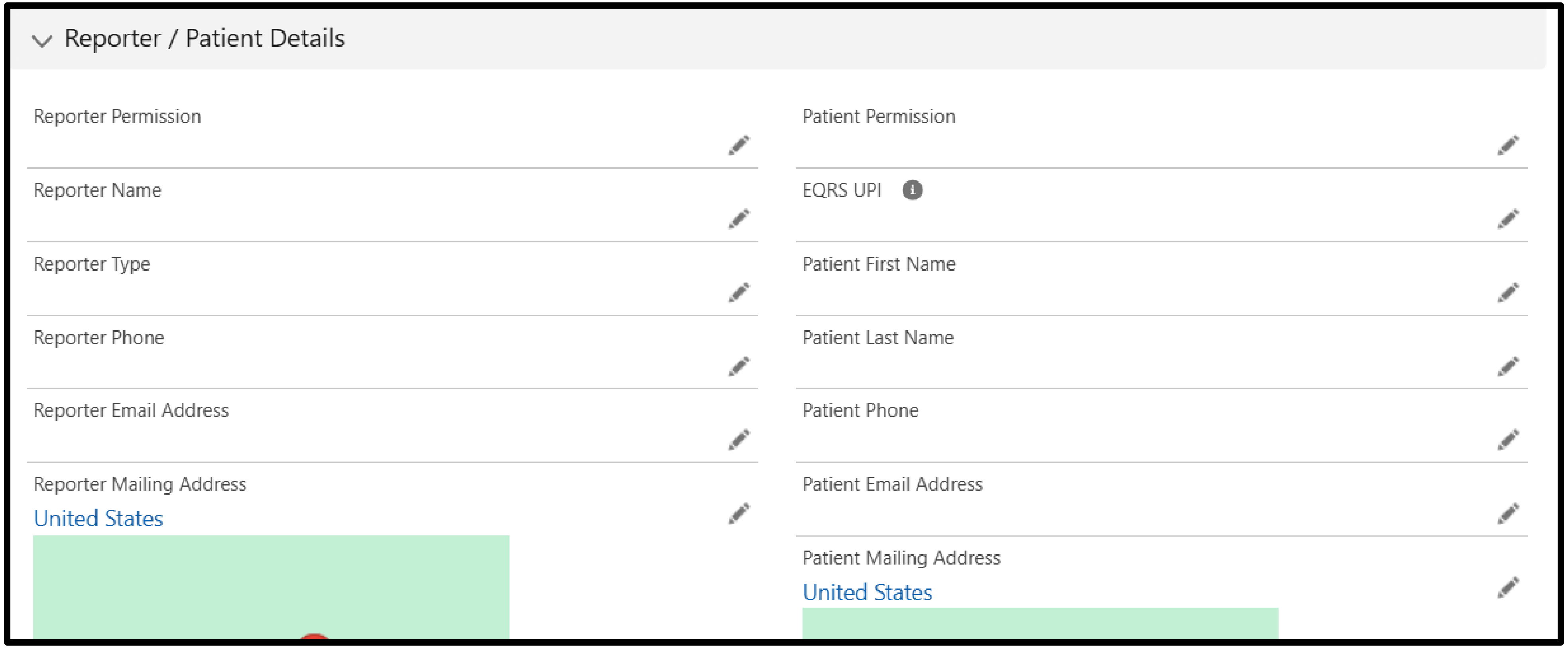


- The Case Owner is the person who is accountable for managing the case to completion. Click the icon to change owners. Select the new owner and check the box to send email notifications.
- Network PCU Agent - the person adding information into the PCU
- Case Number is the Salesforce assigned record 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.

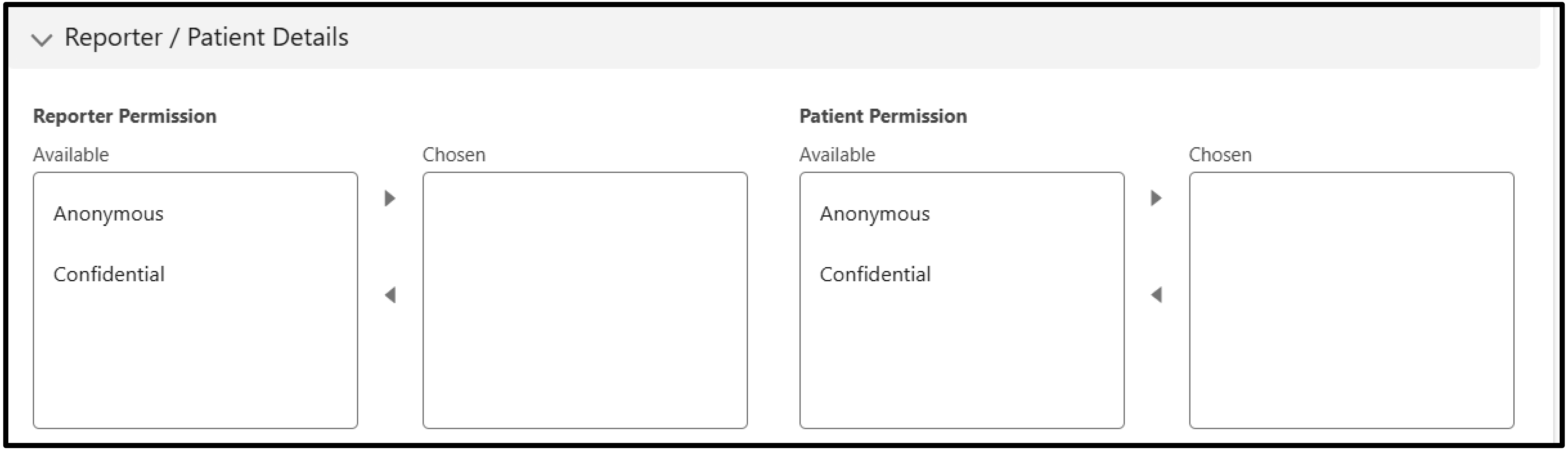


TIP: Information populated in fields like EQRS UPI may be used to pre-populate email templates. Fill out the Patient Mailing address for any grievances that require hard copy letters be mailed.

Case Details Page

Reporter / Anonymous and Confidential

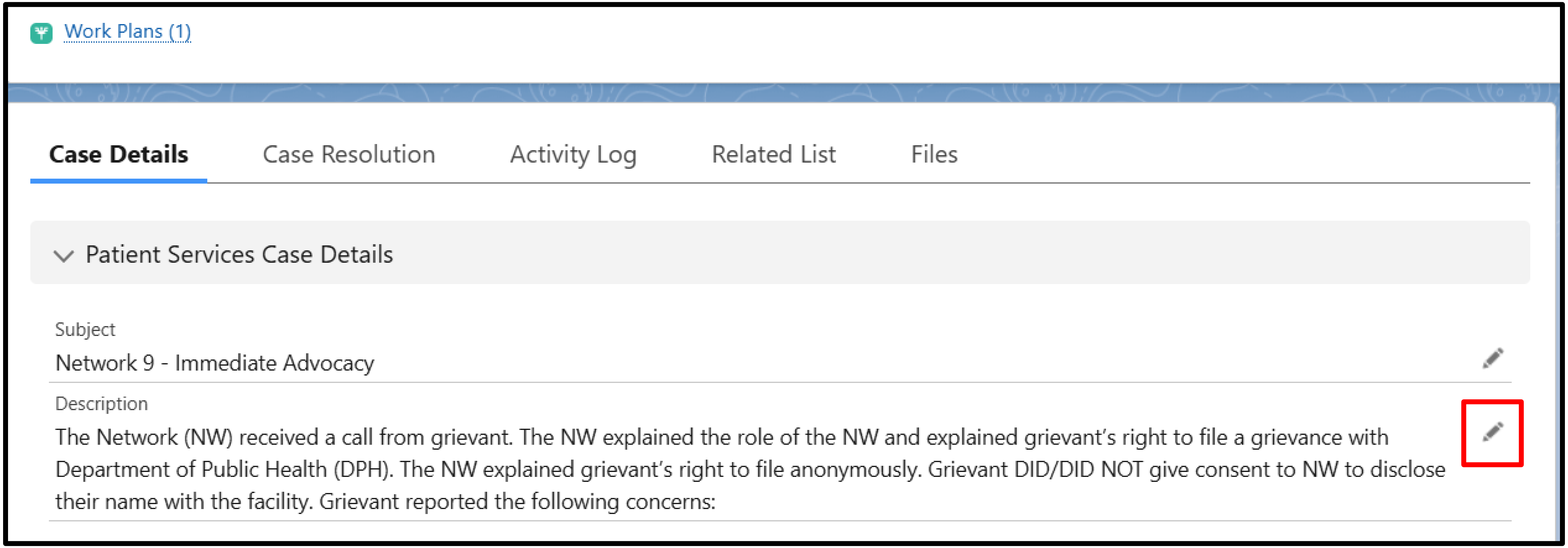
- Reporter Permission allows you to mark a case to be anonymous or confidential



Case Details Page

Patient Services Case Details Section:

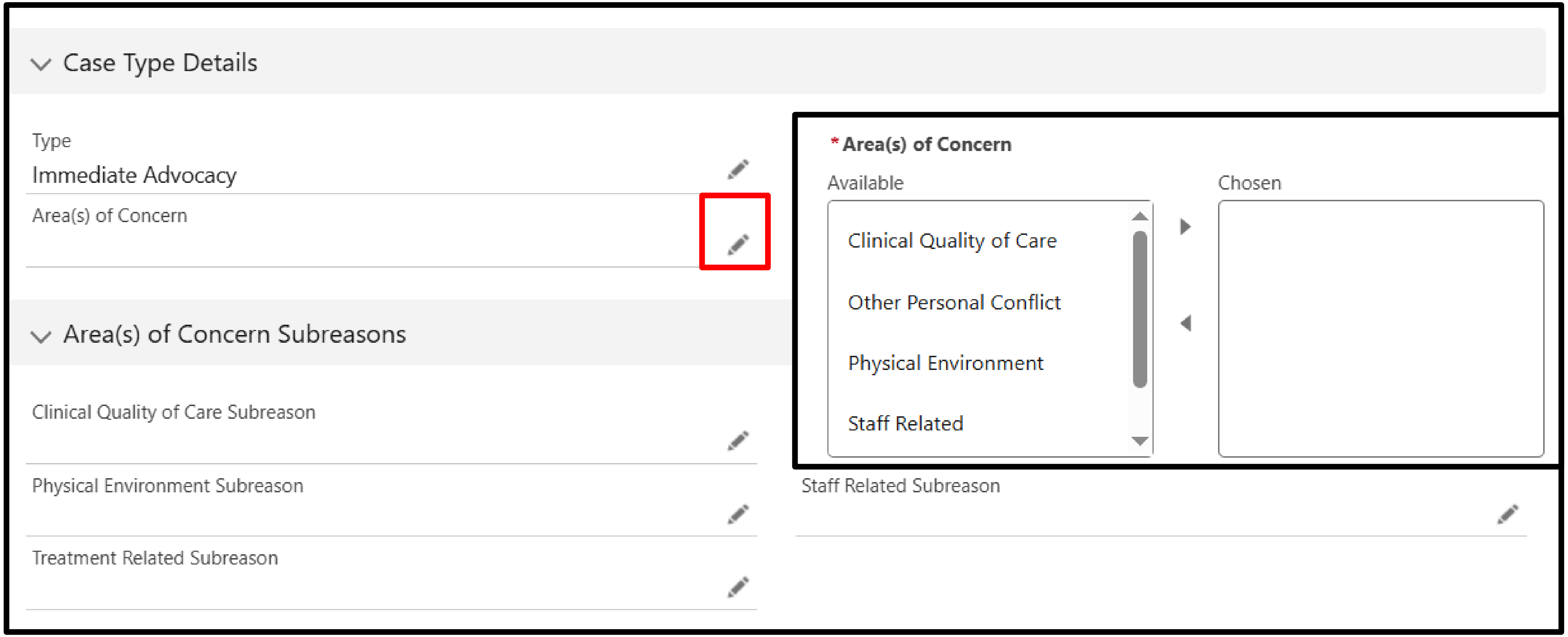
- The subject line is pre-populated with the Network # and the Type of Case you selected.
- The description is pre-populated with initial standard language. Click the pencil to edit the description to include the concerns reported by the Grievant.



Case Type Details

Case Type Details Section:

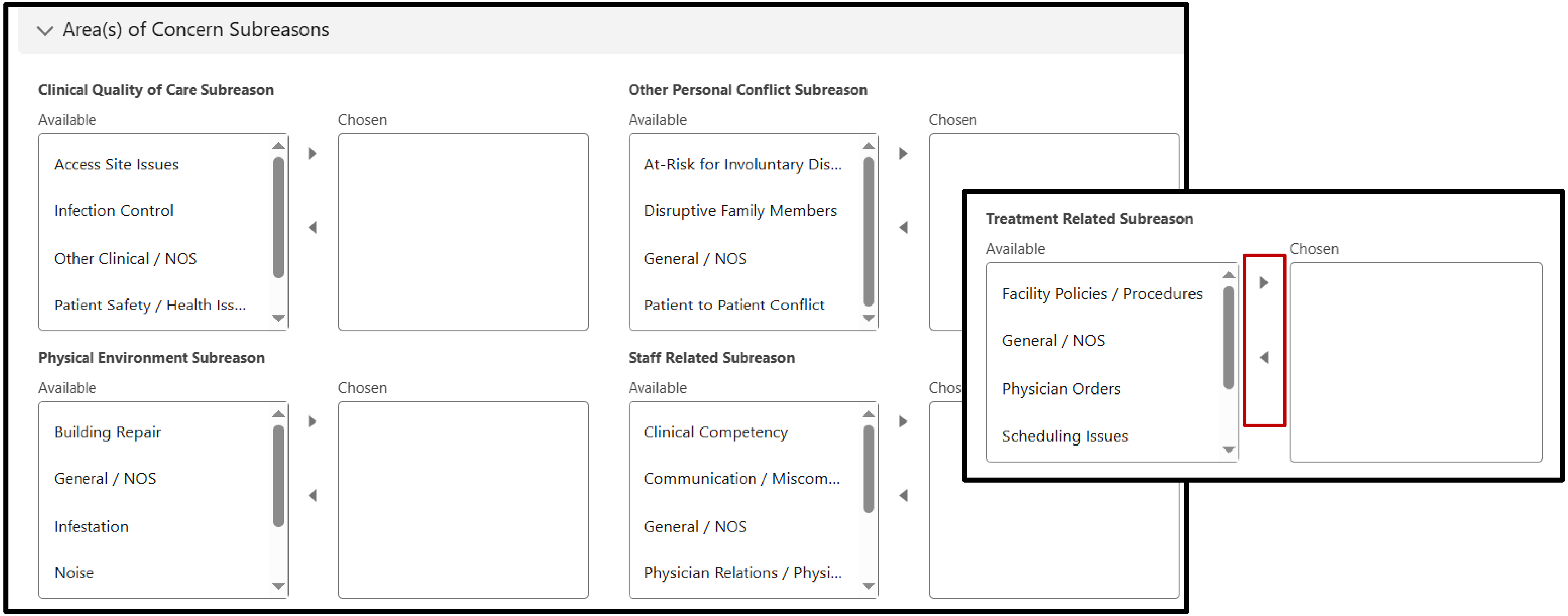
- The type is prepopulated with the case type selected.
- Click the pencil to choose the Areas of Concern from the available options.



Case Type Details

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.



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

Date/Time Opened
5/19/2025, 2:07 PM

Days Open

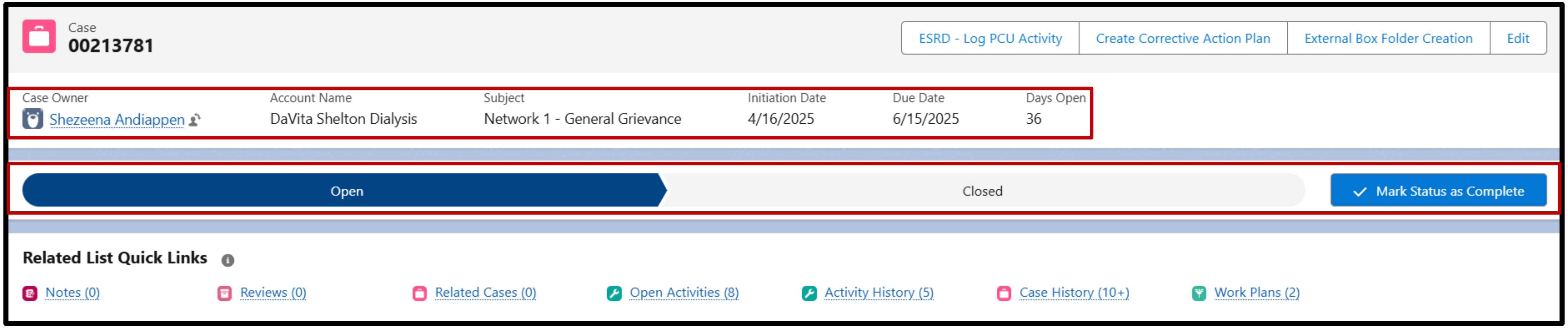
Created By
Shannon Wright, 5/19/2025, 2:07 PM

Last Modified By
Shannon Wright, 5/19/2025, 2:07 PM

Case Record Type
ESRD - Patient Services

Case Type Details

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

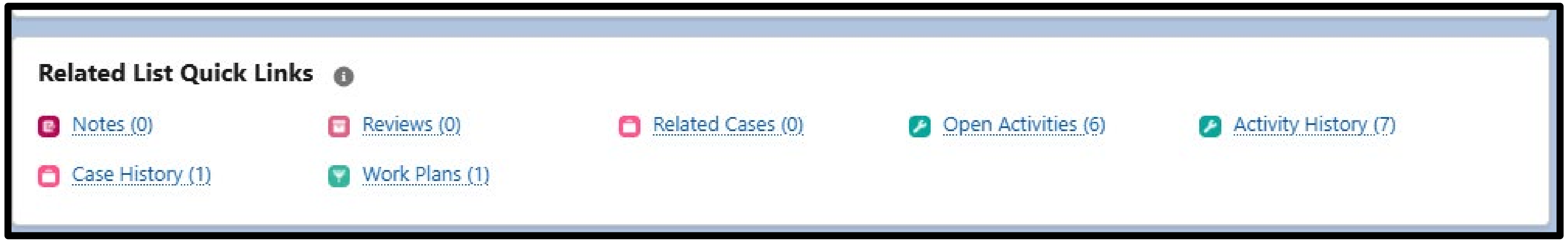


The Status Bar shows the current case status and allows you to quickly change the status using the Mark Status as Complete button.

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.



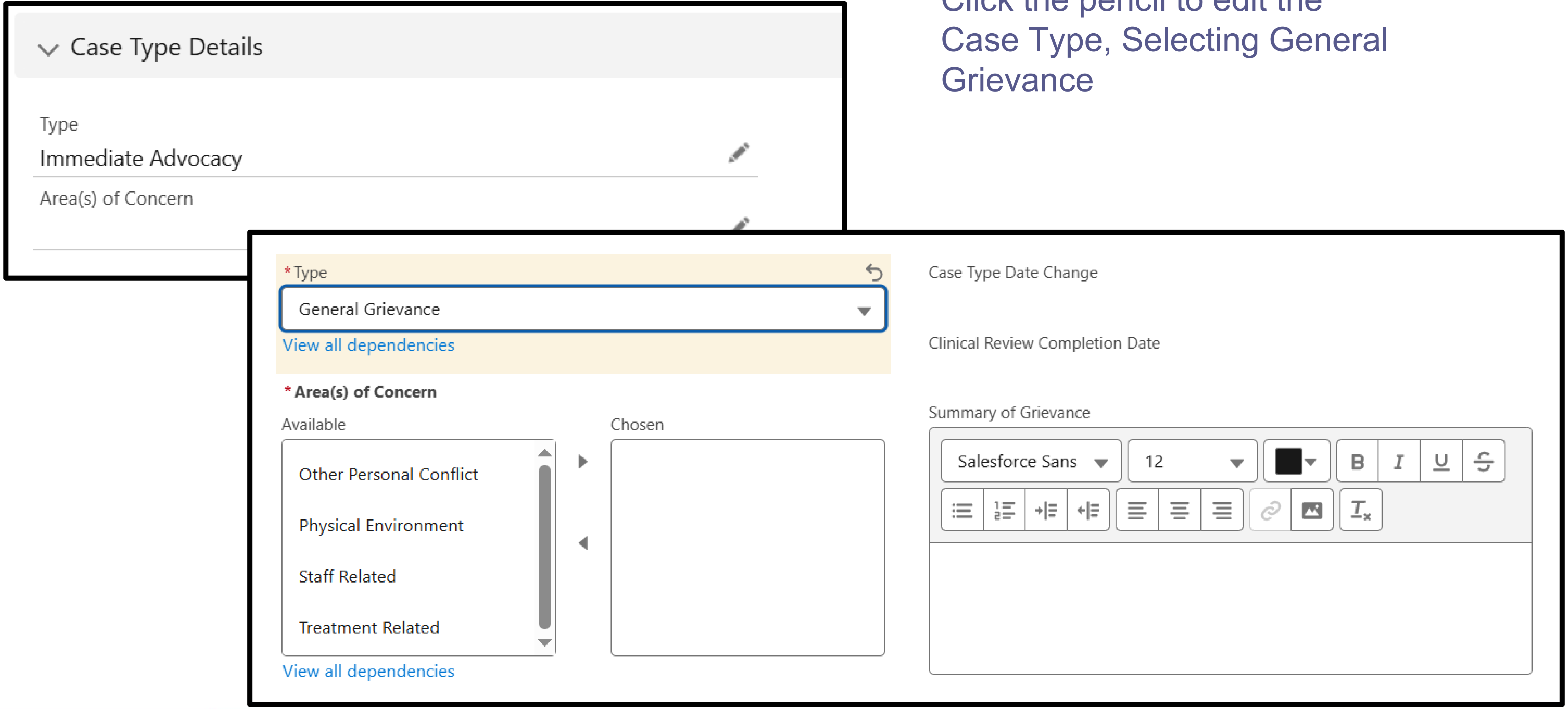
- **Notes**: Initial notes captured during case creation from the home screen are located here. Use this section to capture additional notes as part of your case management process
- **Reviews**: Includes information from QI case review assignments for Nurse Reviewers
- **Related Cases**: An example 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,

Click the pencil to edit the Case Type, Selecting General Grievance

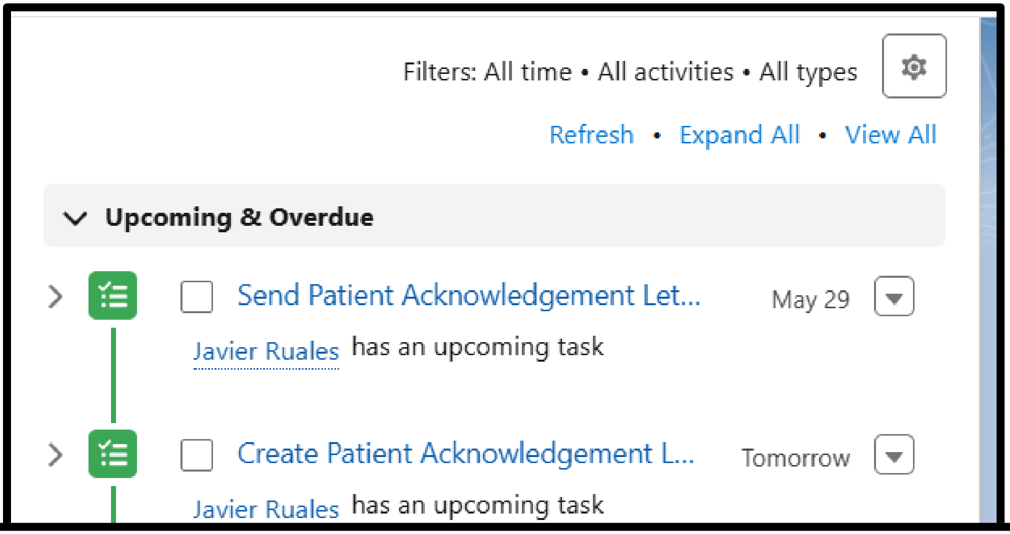


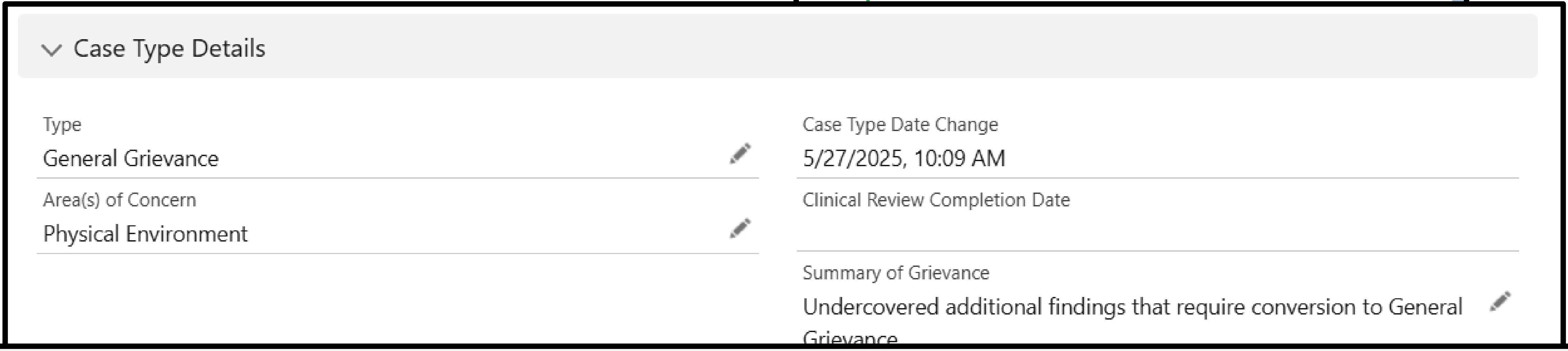
Converting a Case

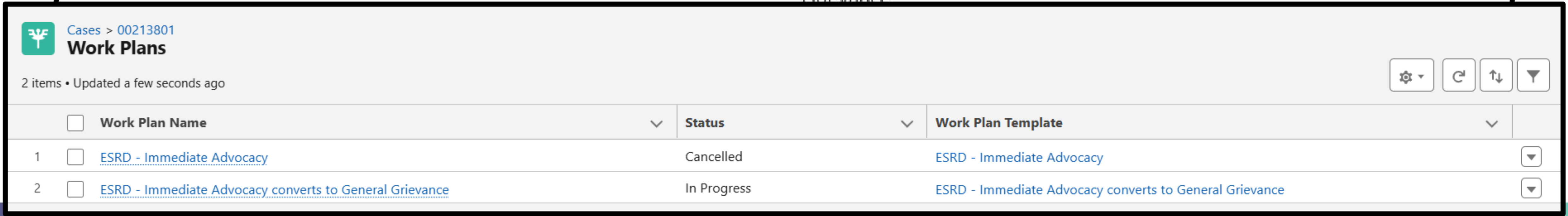
Immediate Advocacy to a General Grievance,

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



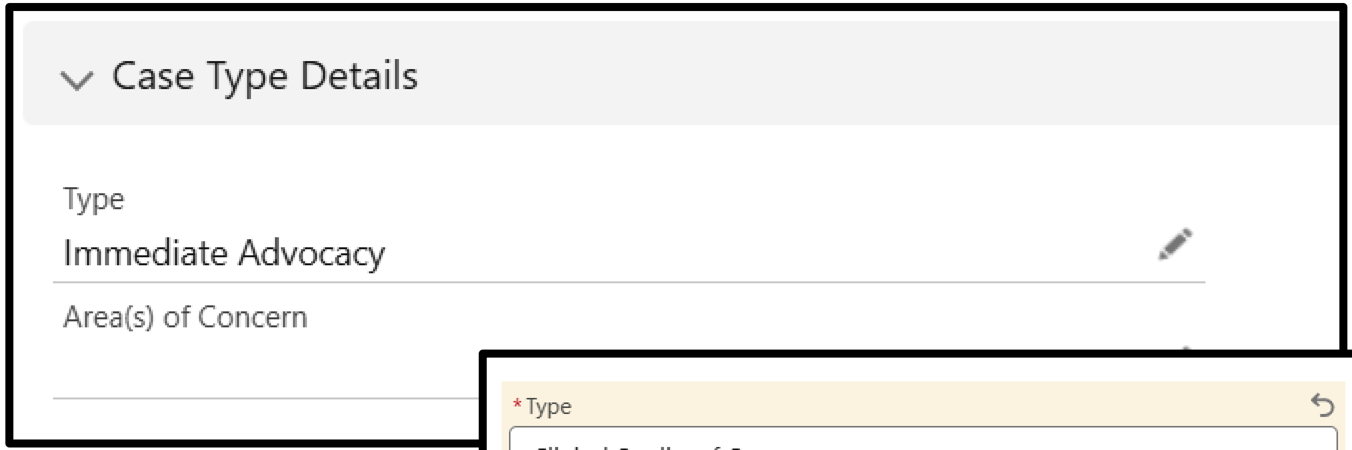


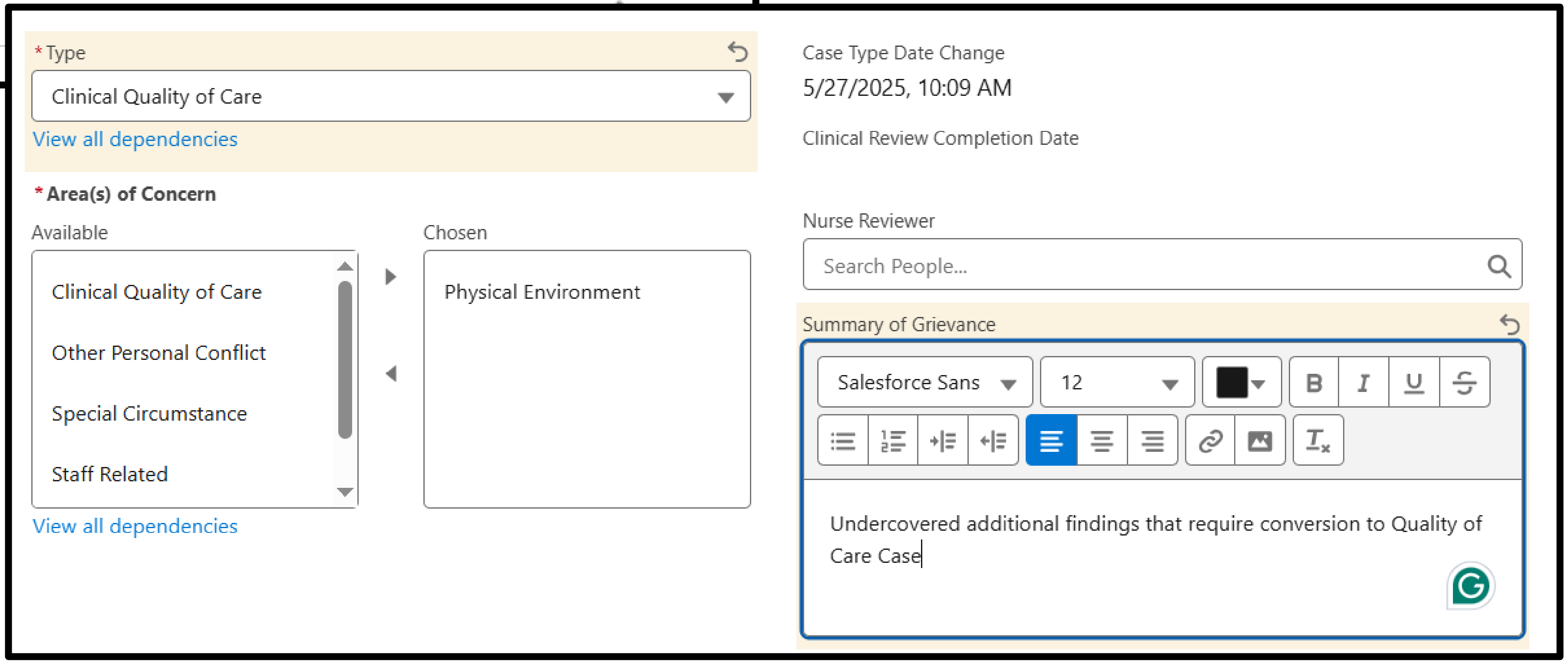


Converting a Case

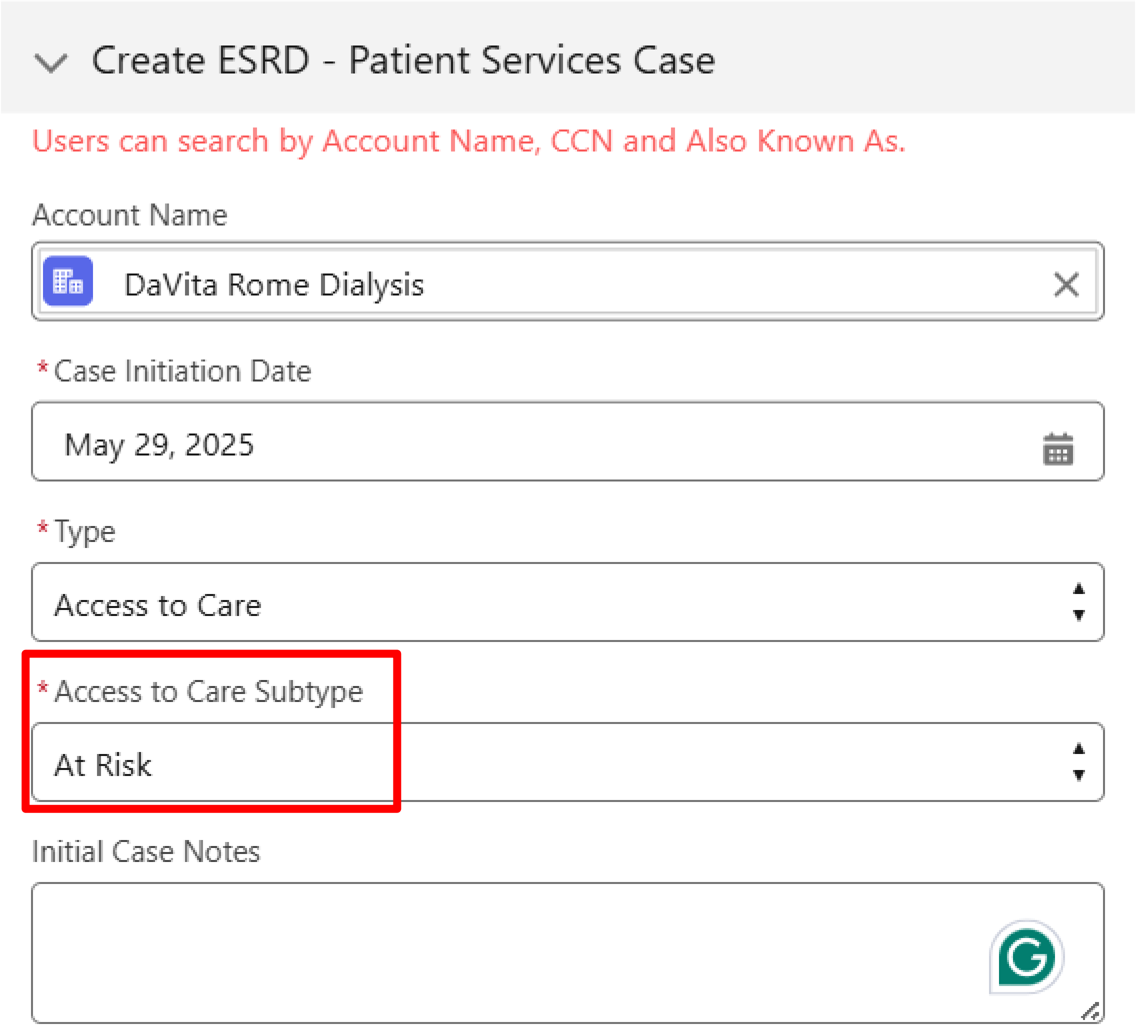
Immediate Advocacy to a Quality of Care Case

- 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





Creating a New Access to Care Case

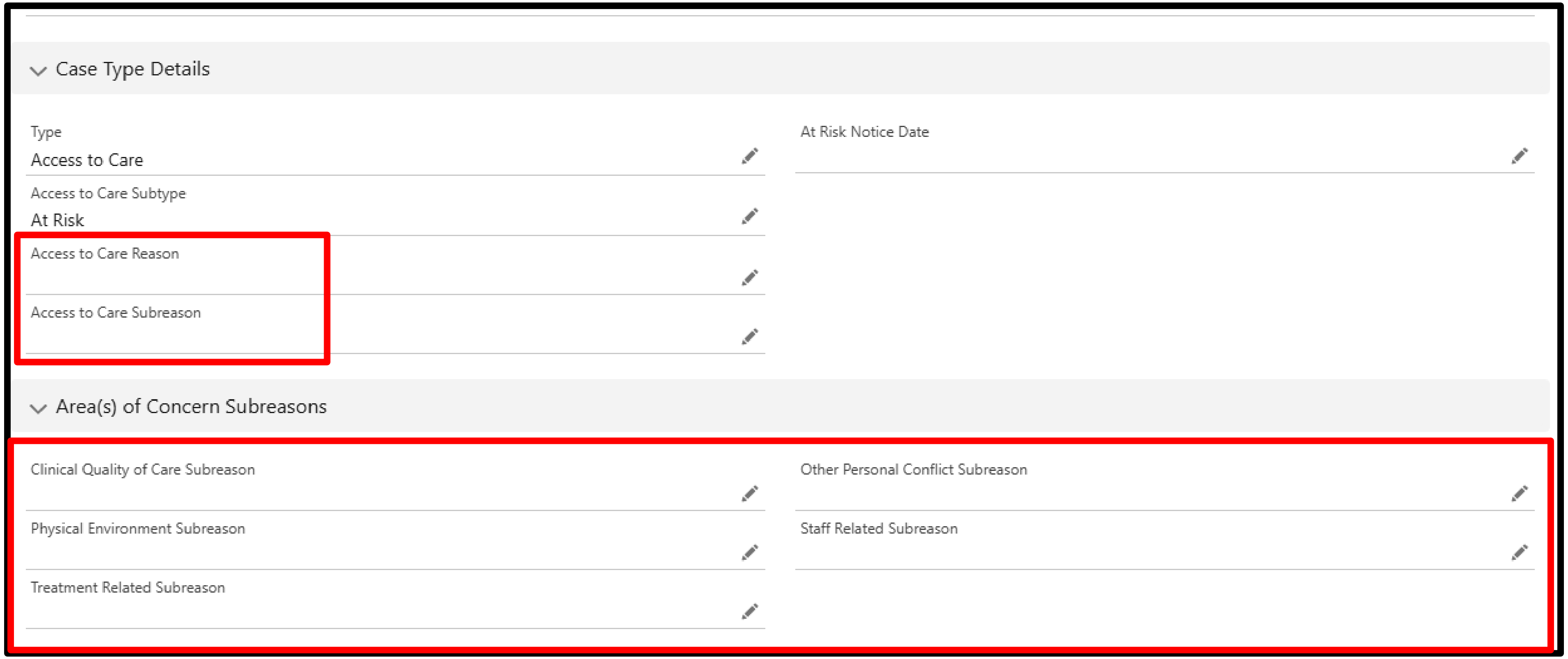


- From the Home screen, you can quickly create a Patient Service Case by first searching for the Account Name, CCN, or Also Known As Name
- For Access to Care Case Types, you will be required to enter a Subtype: At Risk, Failure to Place, Confirmed Discharge
- Add your initial notes as before
- Next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

Creating a New Access to Care Case

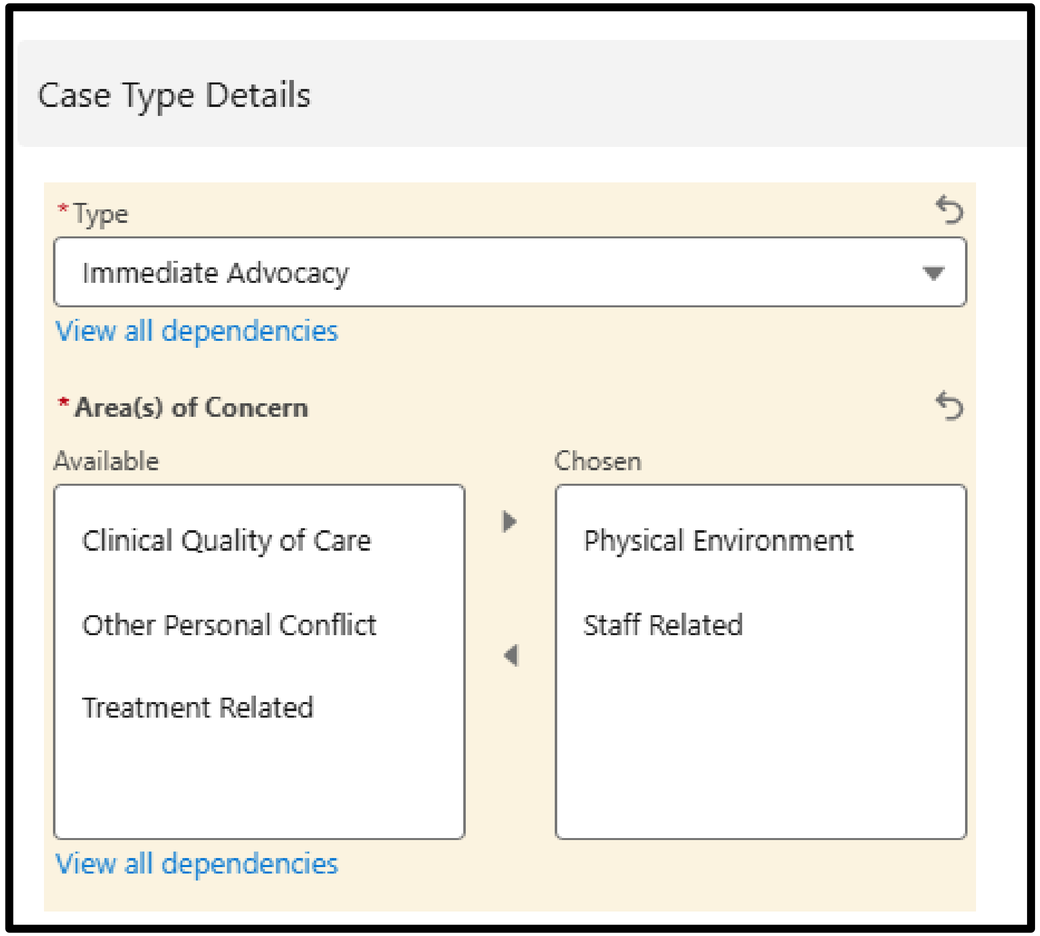
Once the case is created, open the case record and complete the rest of the case details. It is important to ensure that you have listed:

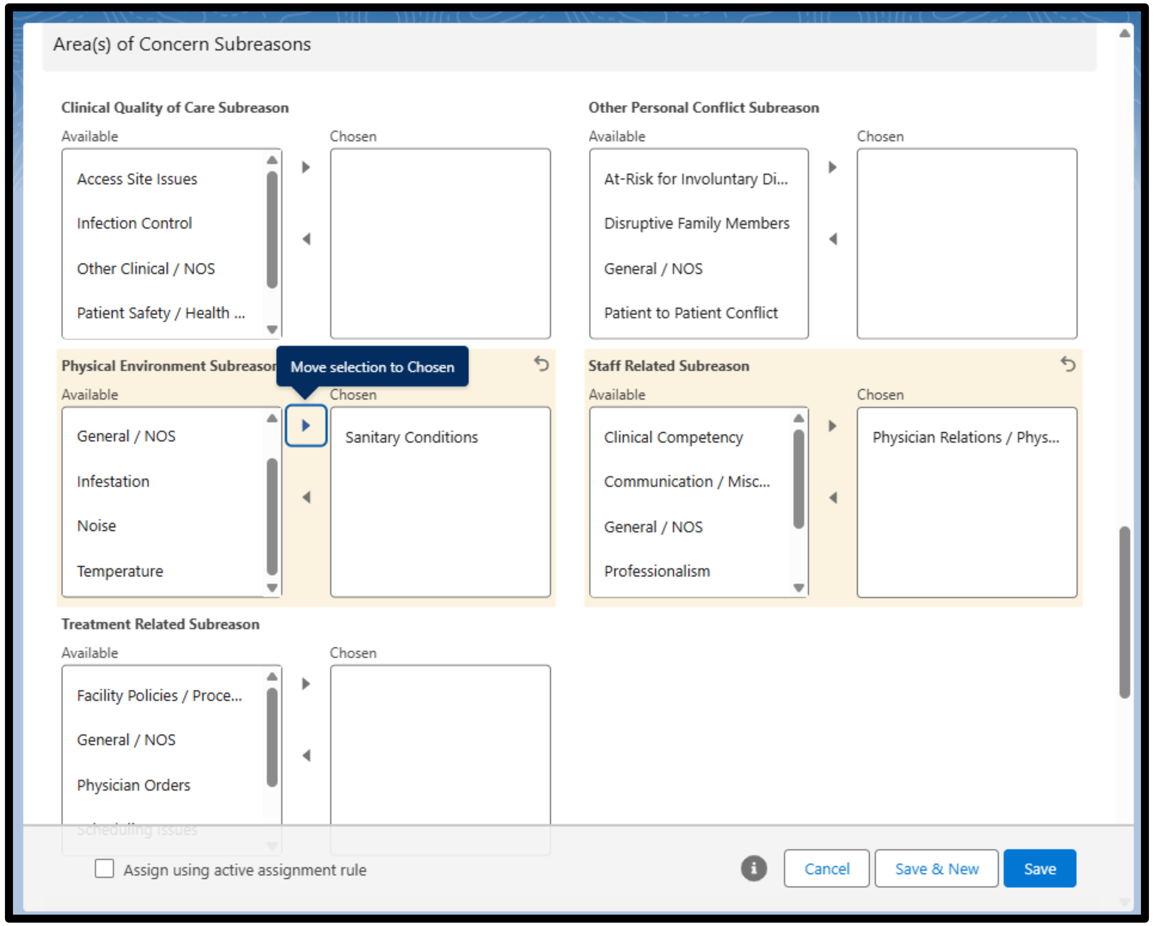
- Access to Care Reason
- Access to Care Subreason(s)
- At Risk Notice Date



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

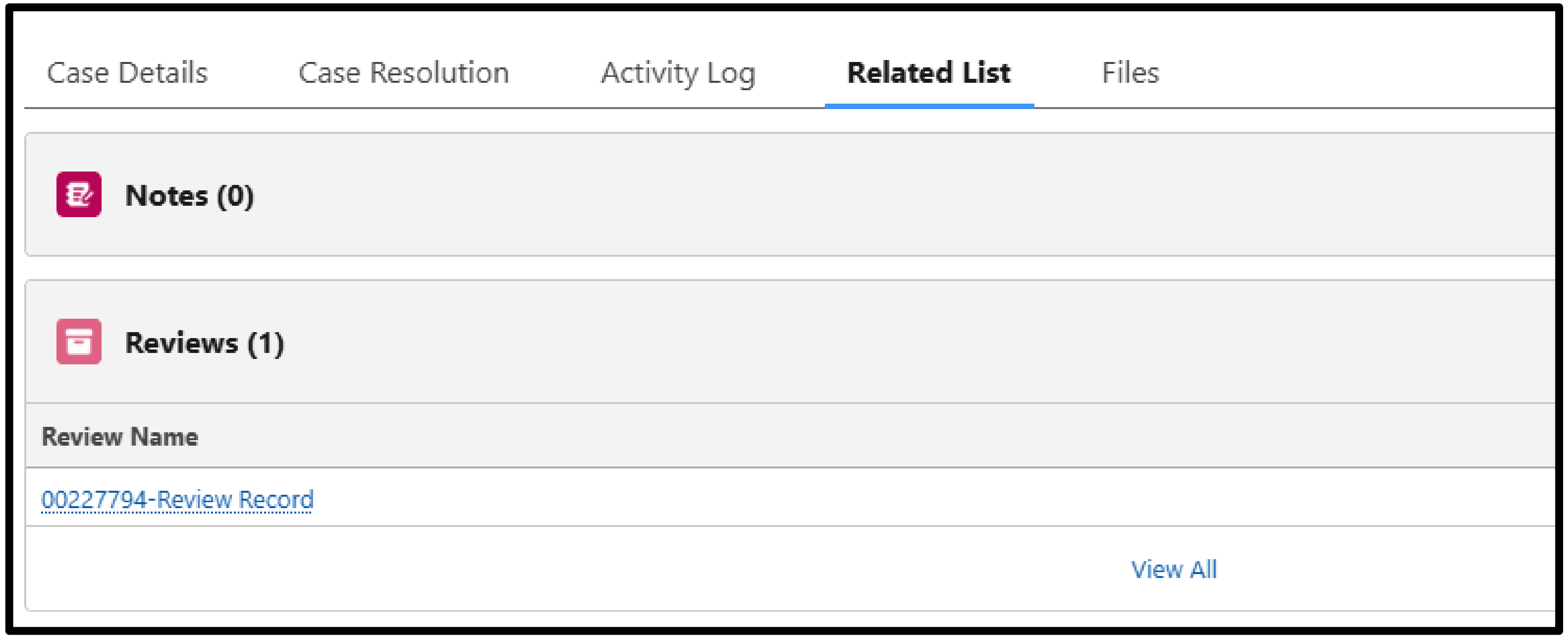




Part 3:
Working a Case with Nurse Reviews and Corrective Action Plans

Quality of Care Case Reviews

Nurse Reviewers

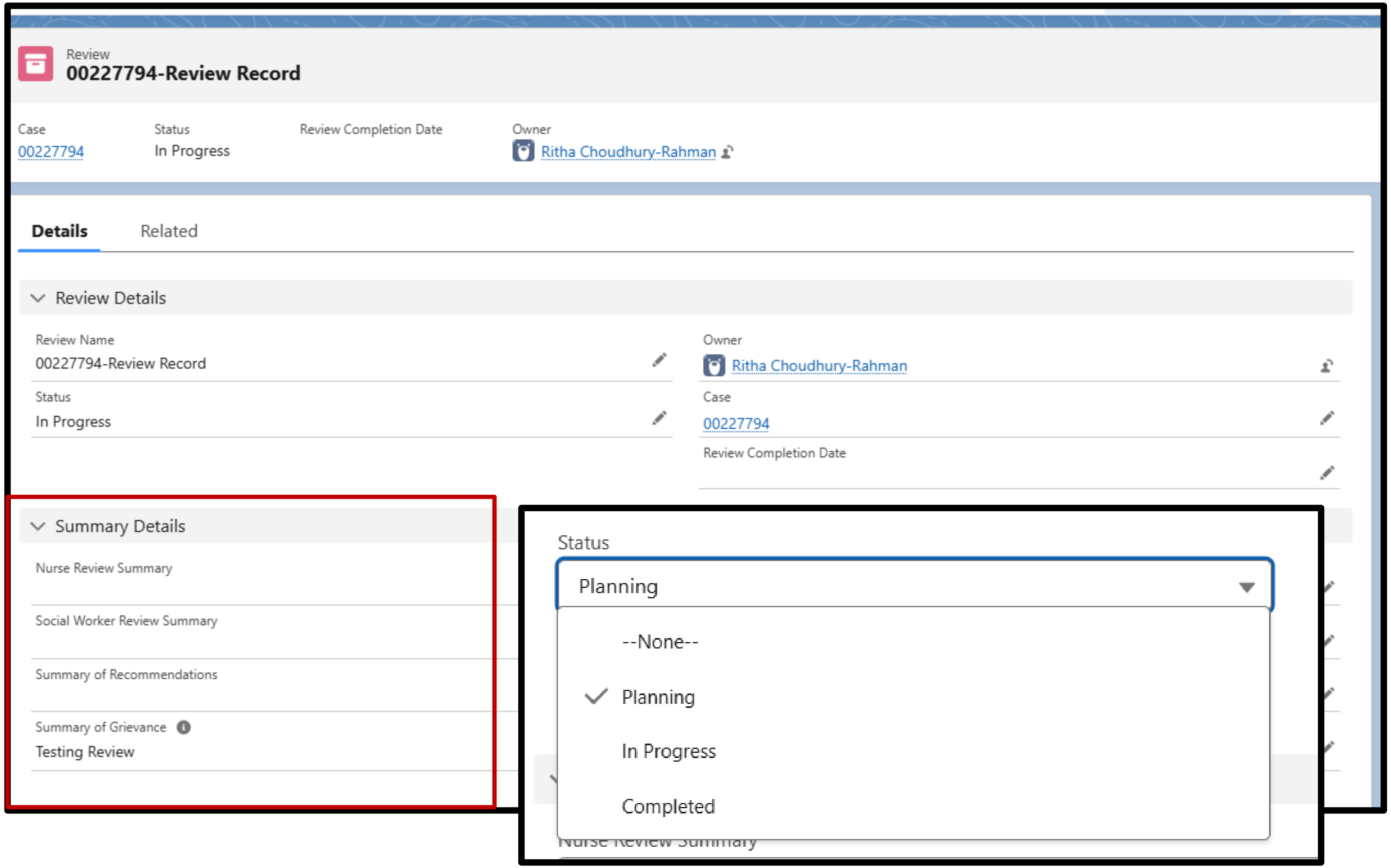


- Once a Nurse Reviewer is added to a Clinical Quality of Care Case, they will be notified to log into Salesforce and complete the Review
- On the case, click the Related List or the Related list Quick Link for Reviews to access the Review Record details

Quality of Care Case Reviews

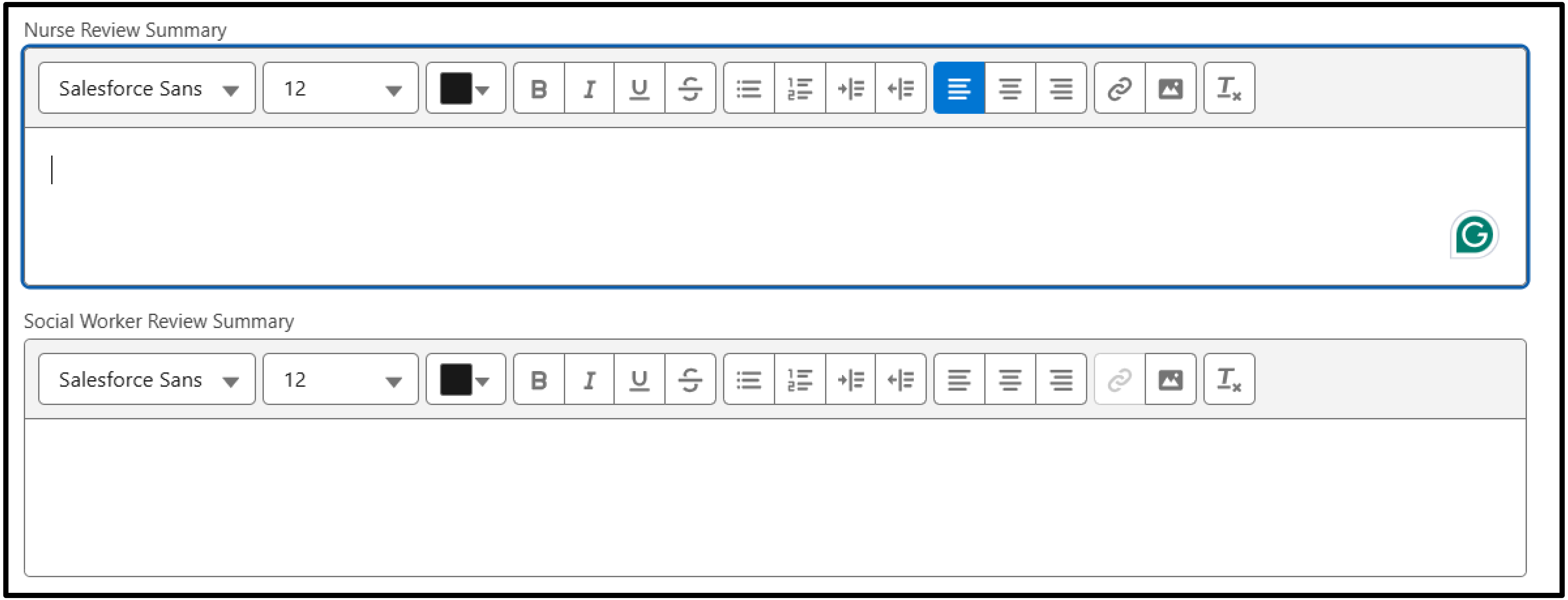
Nurse Reviewers

- 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



Quality of Care Case Reviews

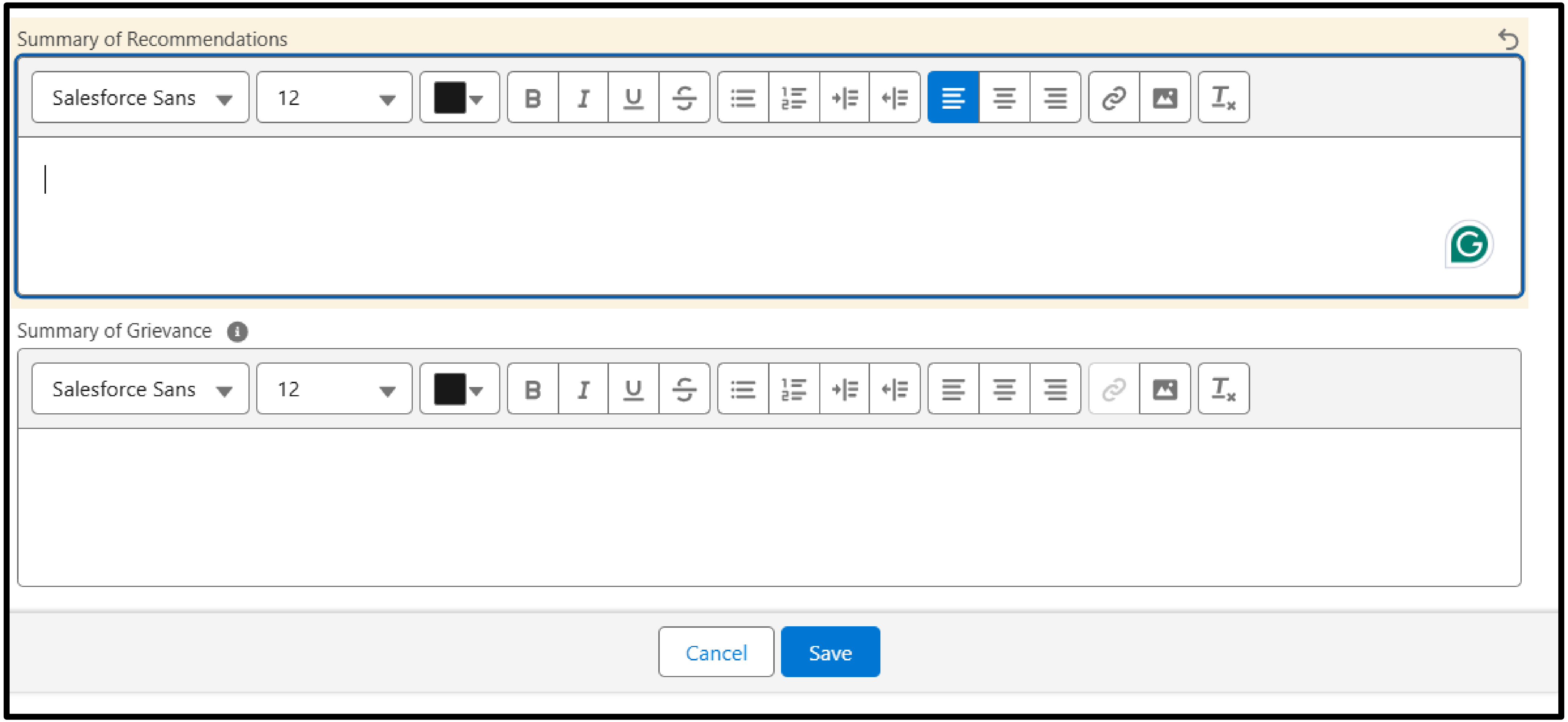
Nurse Reviewers



- The Nurse Reviewer Summary is used to capture the Nurse Review.
- The Social Worker Review Summary is used to capture the Social Worker Review.

Quality of Care Case Reviews

Nurse Reviewers

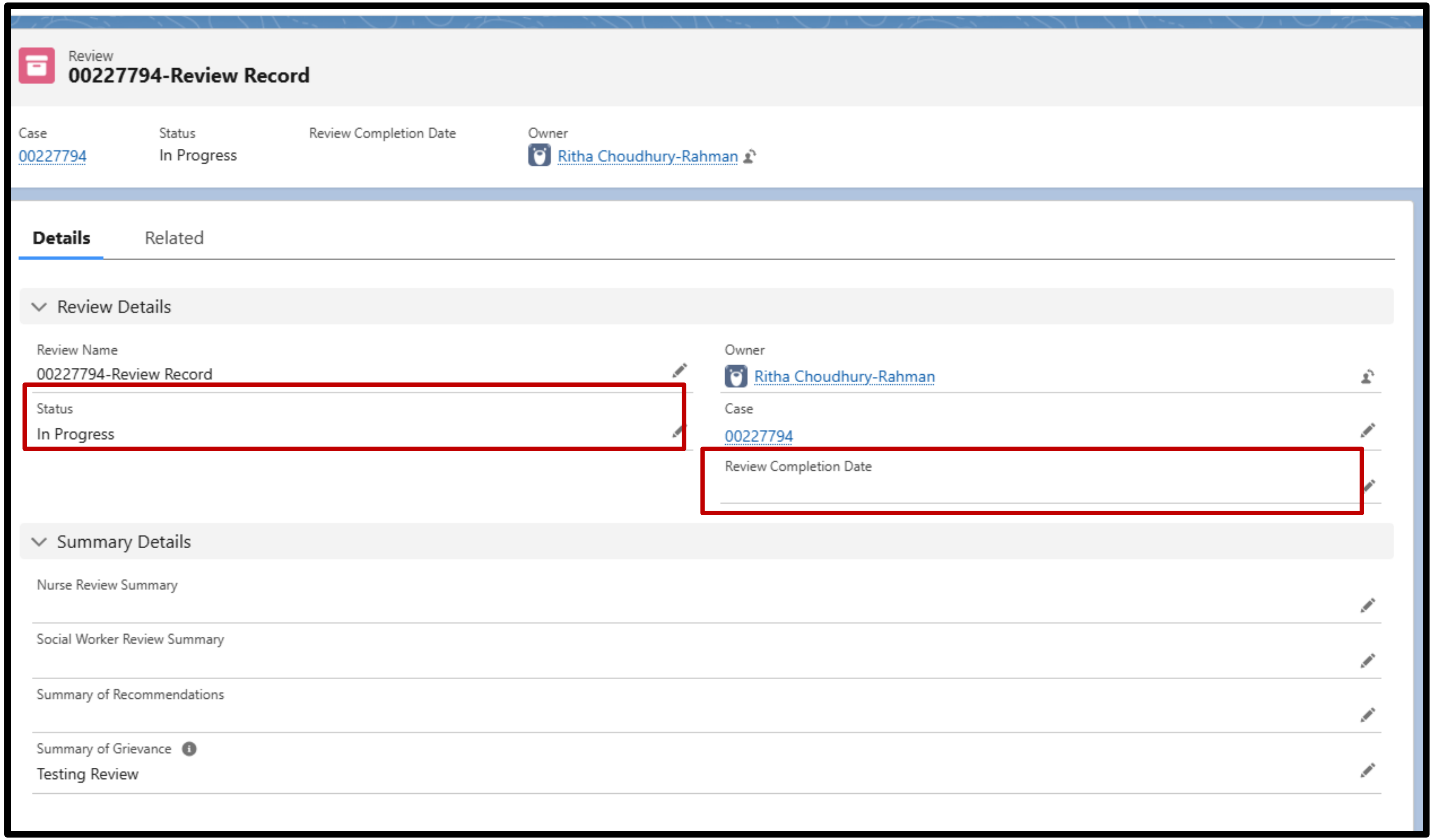


- Both the Nurse Reviewer and Social Worker may add recommendations
- The summary of grievance pre-populates based on the information provided in the Summary of Grievance field on the Case Details screen.

Quality of Care Case Reviews

Nurse Reviewers

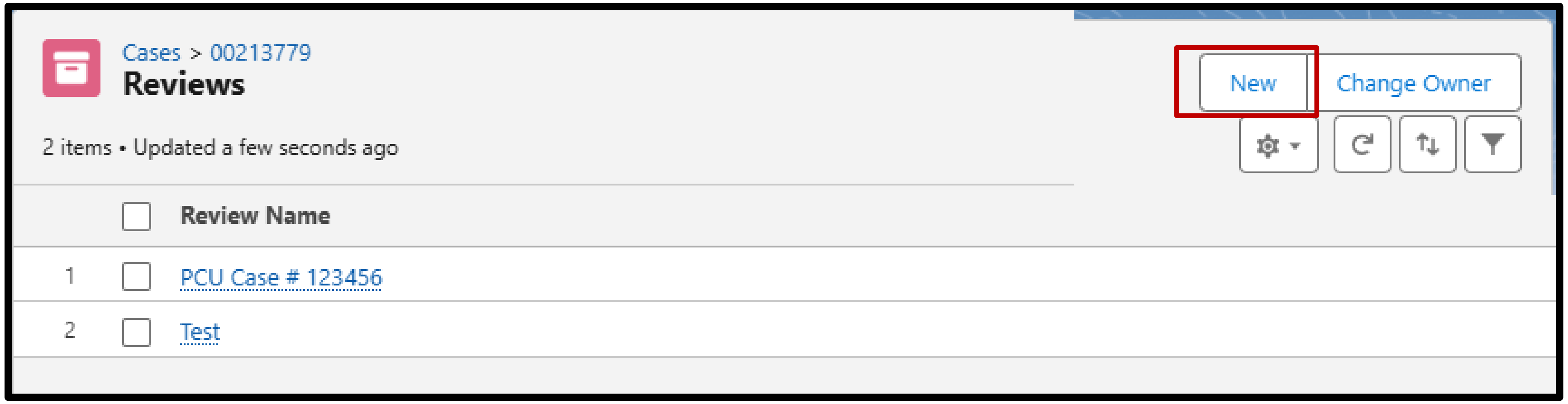
- Once all the review steps are done, update the Status to Completed and add a Review Completion Date
- The case will then update with the Review Completion Date and a notification email will be sent to the Case Owner that the review is complete.



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



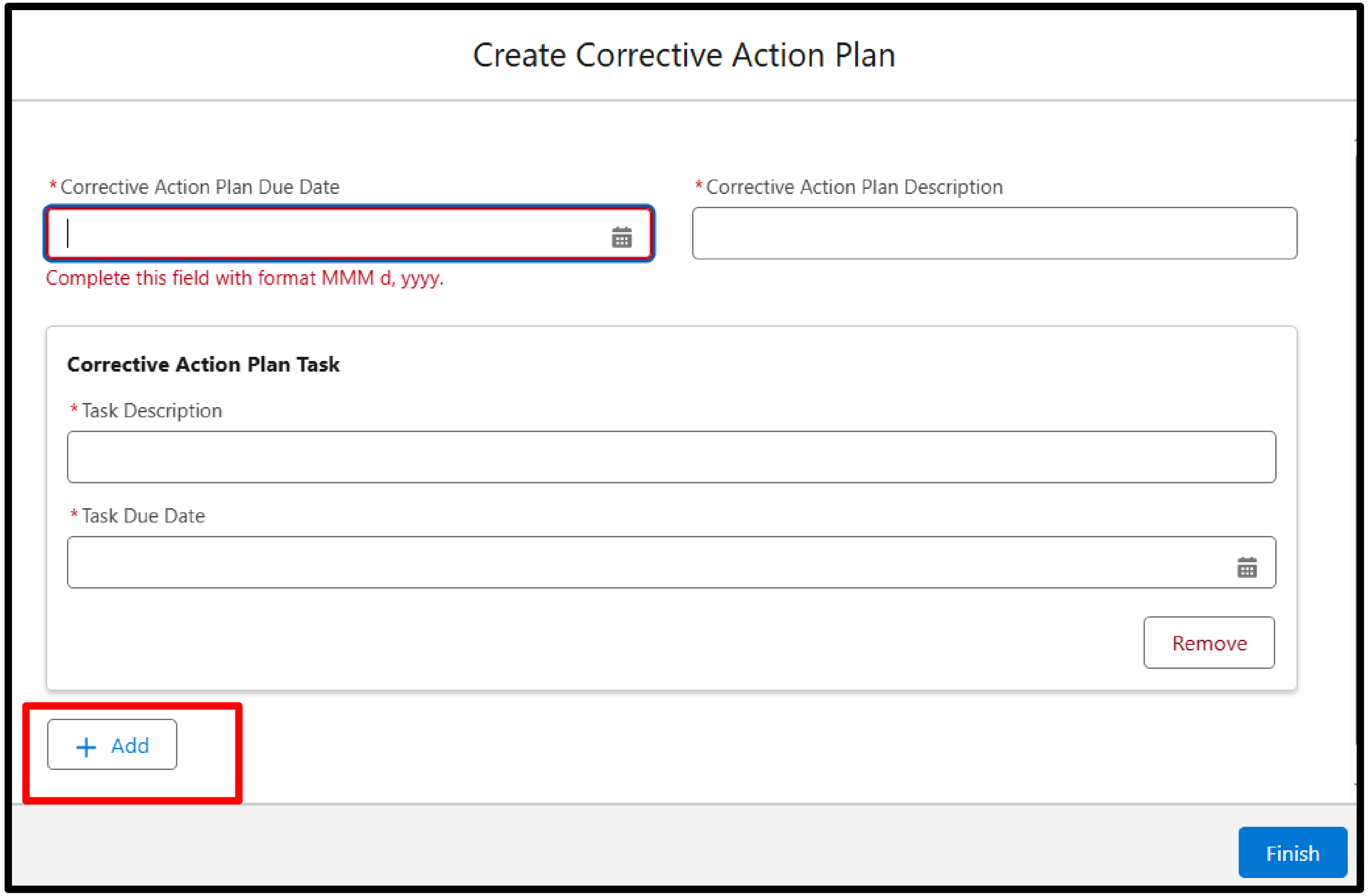
- If a second review needs to be added to a case, either the Case Owner or the Nurse Reviewer may create a second Review by going into the Reviews related list on a case and clicking New.
- Complete the Review Name, Status, and Summary, work the Review as normal.

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

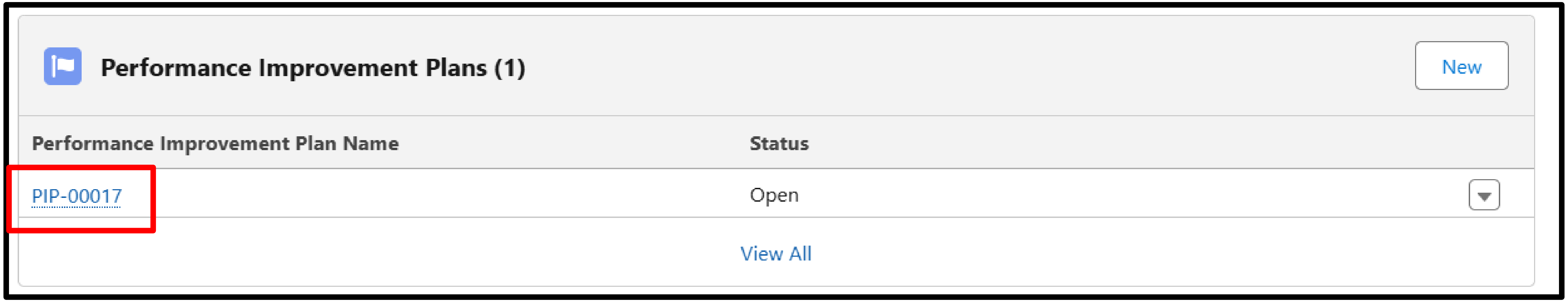
Corrective Action Plans (CAP)

- 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



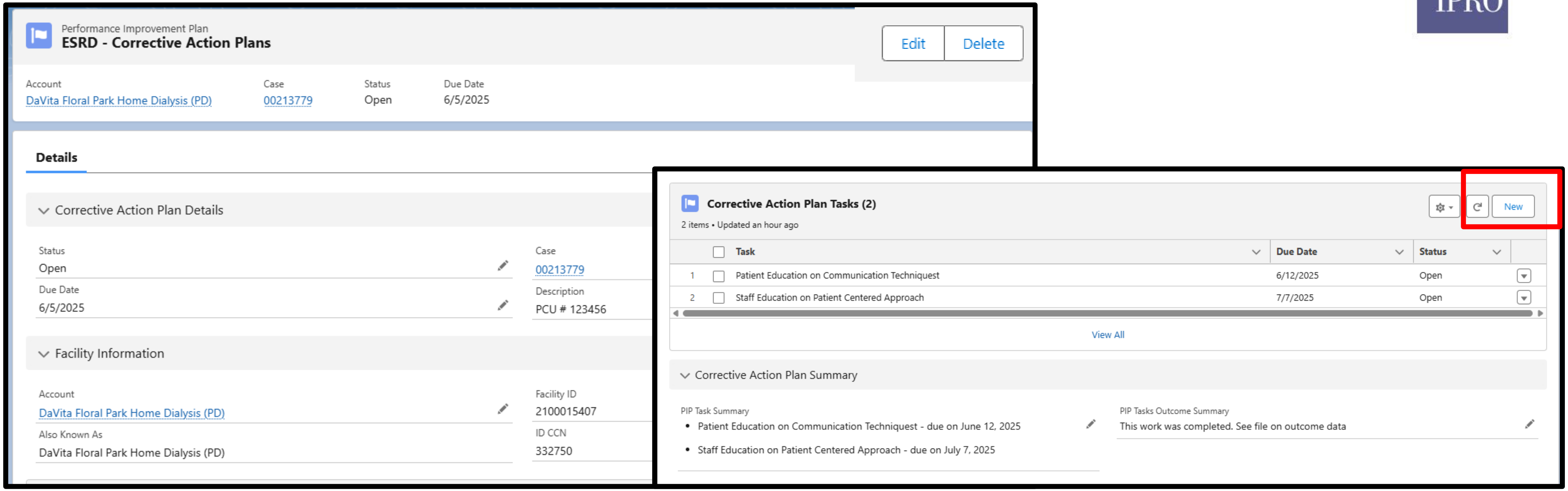
It is a Best Practice to use a Department Standard Naming Convention for your description for improved reporting metrics

Corrective Action Plans (CAP)



- 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)



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

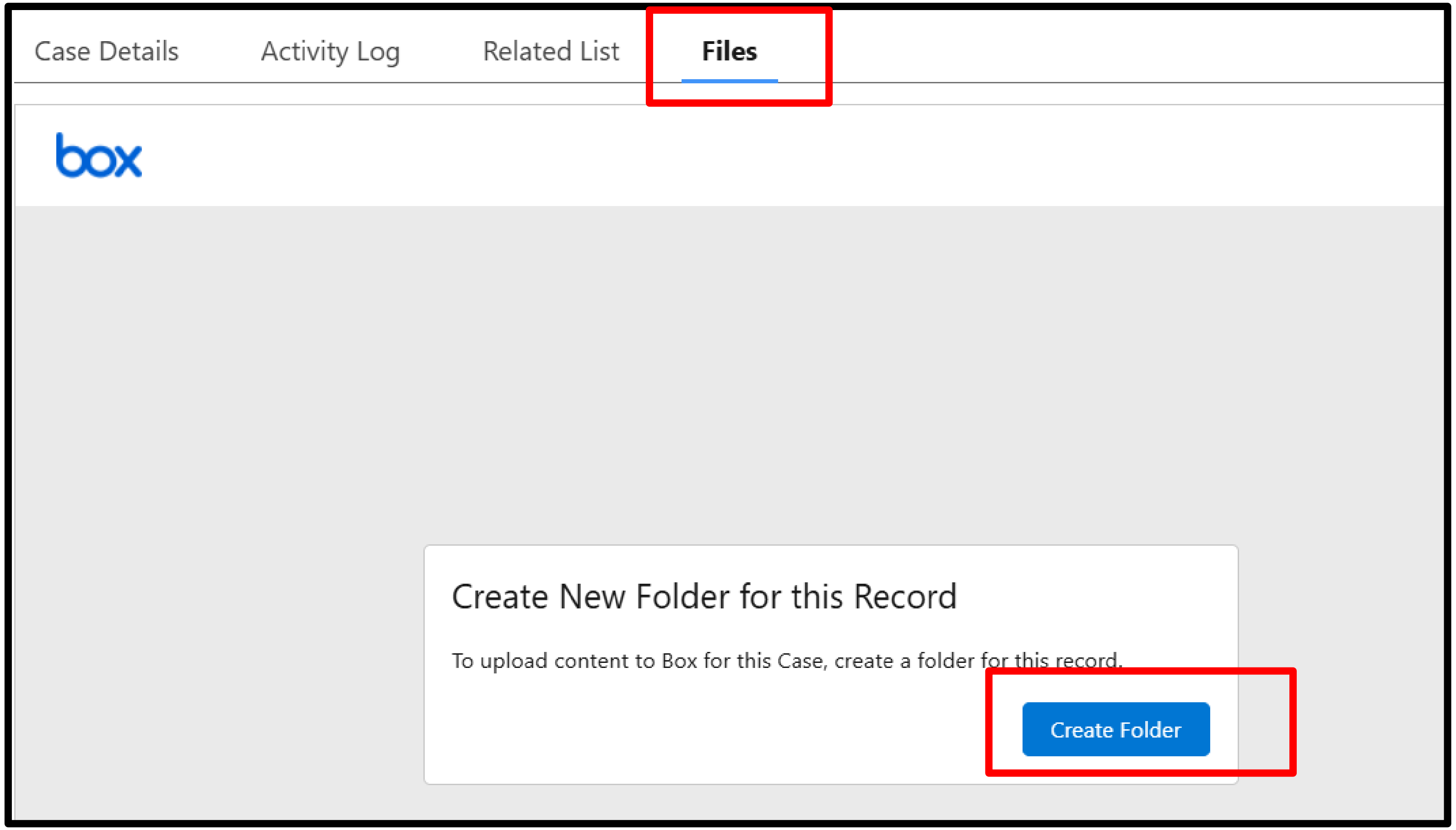
- Work plan tasks have been added for the Sending Acknowledgement Letters and Resolution Letters
- A new activity should be created for other types of tasks that require sending or receiving information and assigned to Program Support who will support the task. These types of activities include:
    - 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.

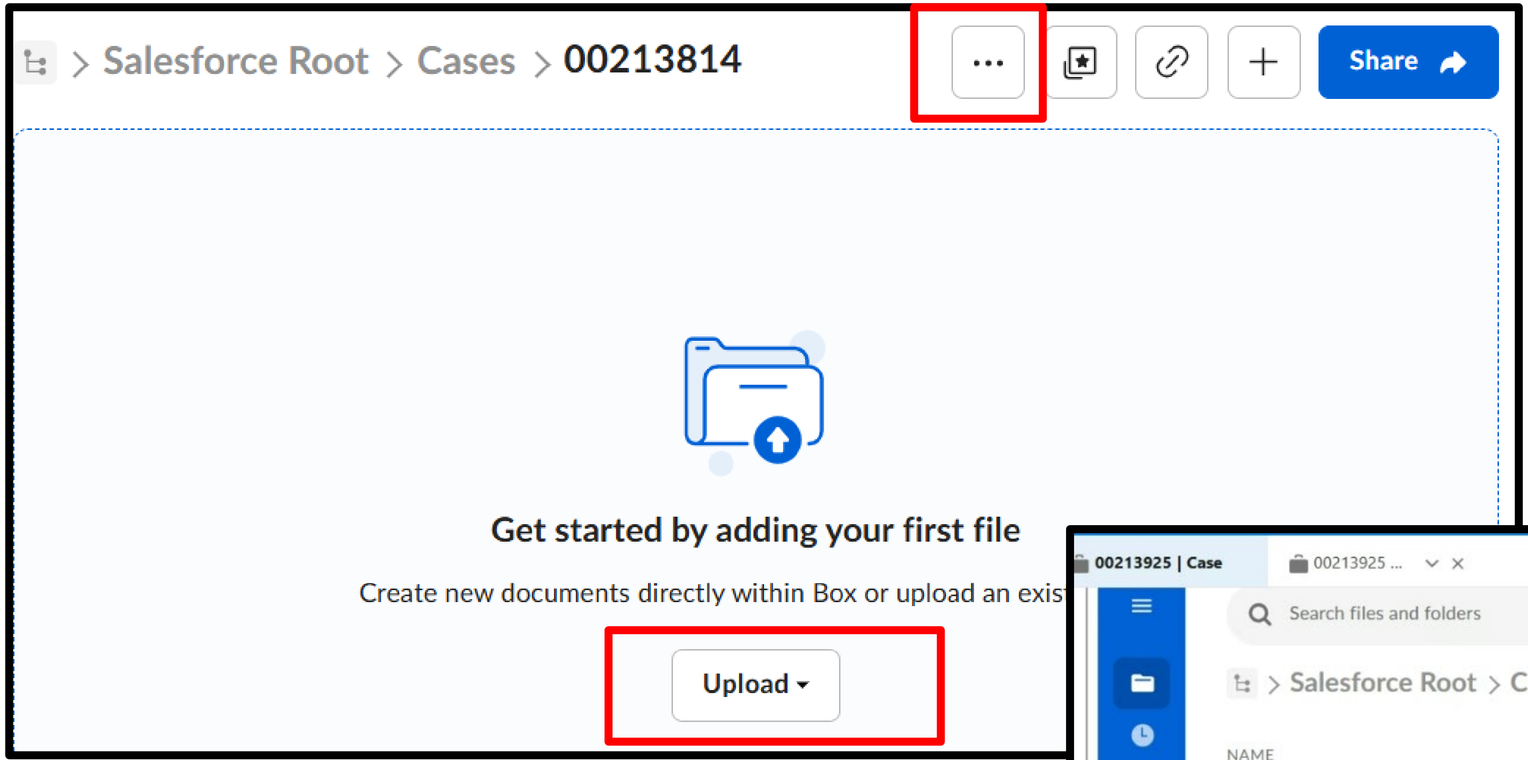
NOTE: Program Staff may upload documents to Box and create a Task assigning it to the Patient Service staff to capture the receipt of signed documents like the Patient Service Representative form.

Storing Case Documentation

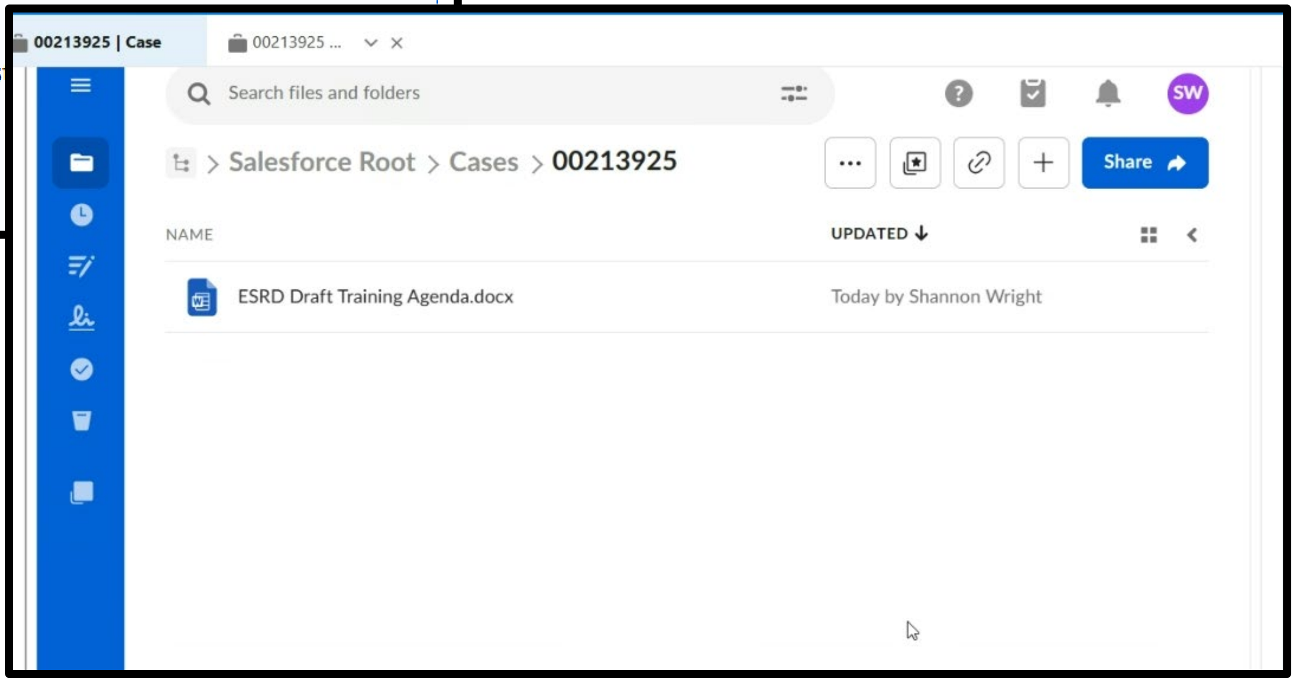
- For the storage of physical documents, IPRO uses a tool called BOX
- After creating Acknowledgement and Resolution letters, or any other document, you can attach the letter to the case record via Box.
- Navigate to the Files section on the case.
- Select Create Folder



Storing Case Documentation

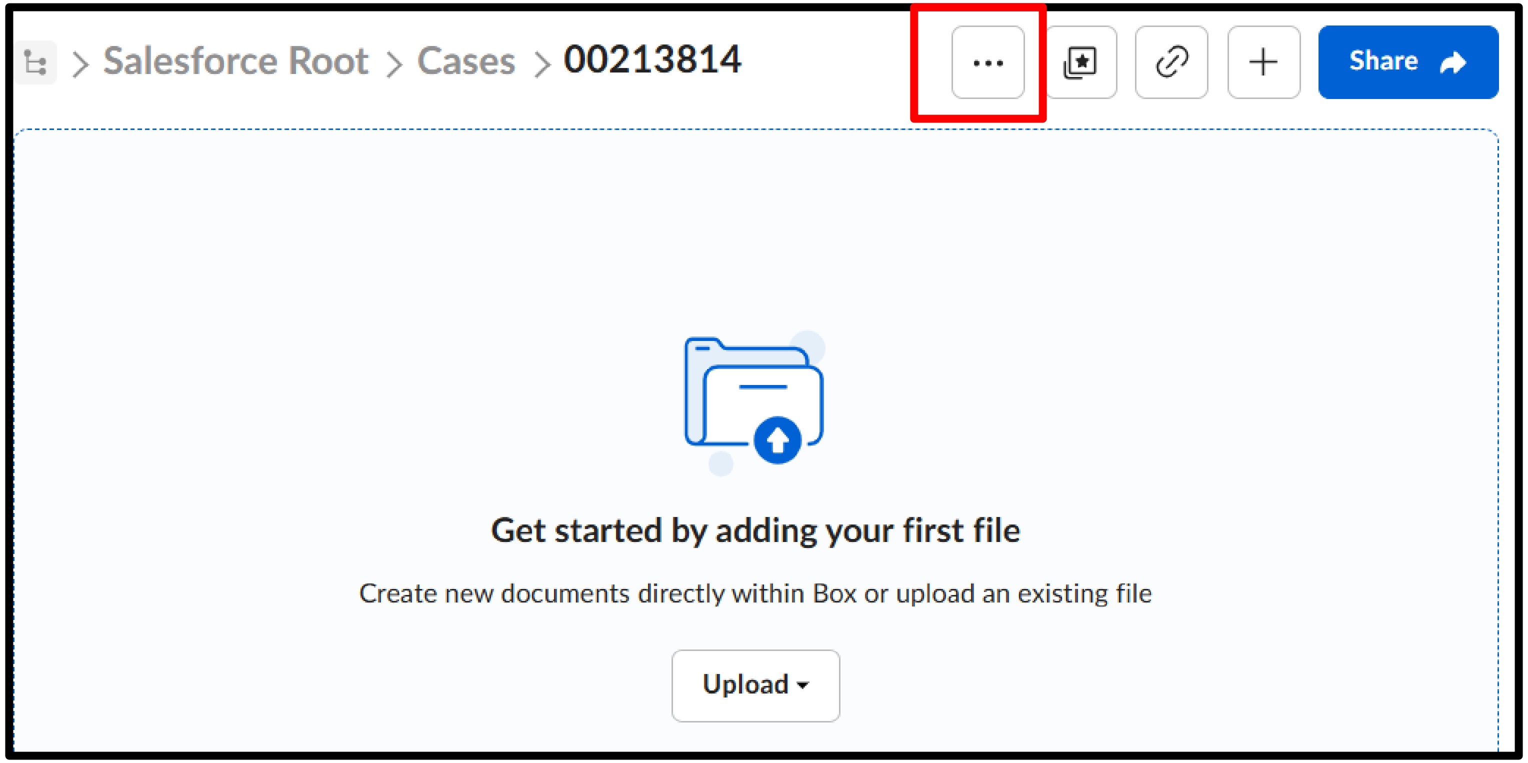


From this screen you can upload any letter or document that you may already have by selecting upload and choose your file

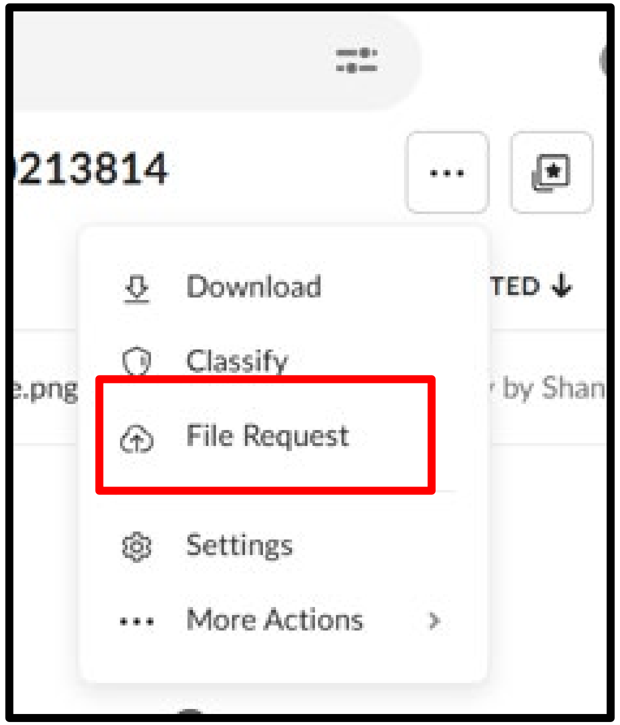


Refresh the screen and the file will be available to access from within Salesforce.

Secure Data Transfer of information from Facilities

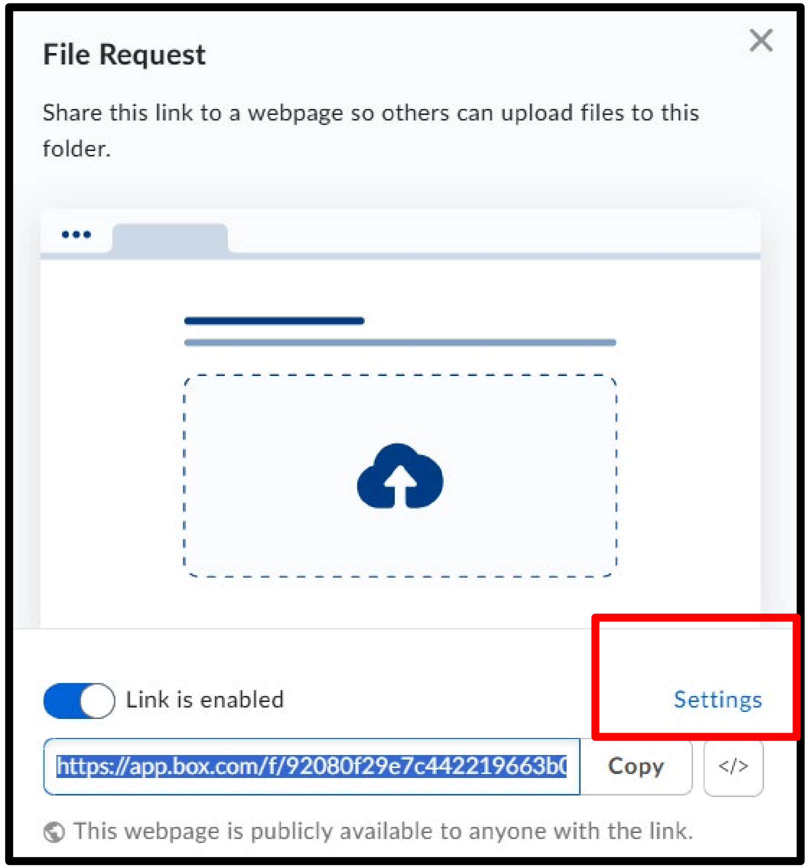


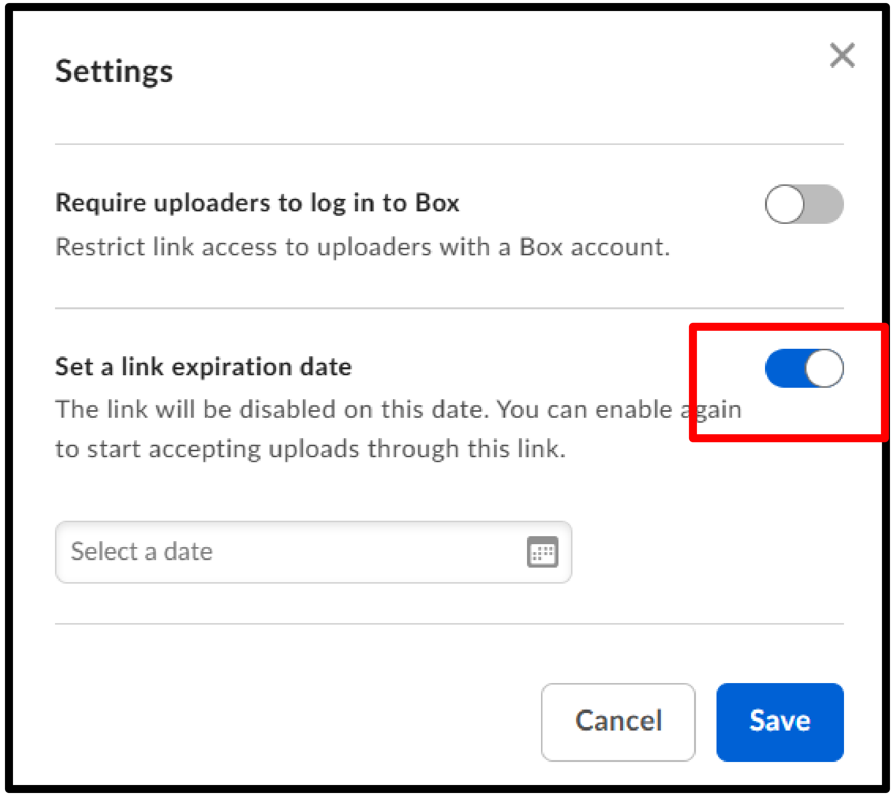
You can also generate a secure external link to send to a facility via email by going to the 3 dots and selecting File Request



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

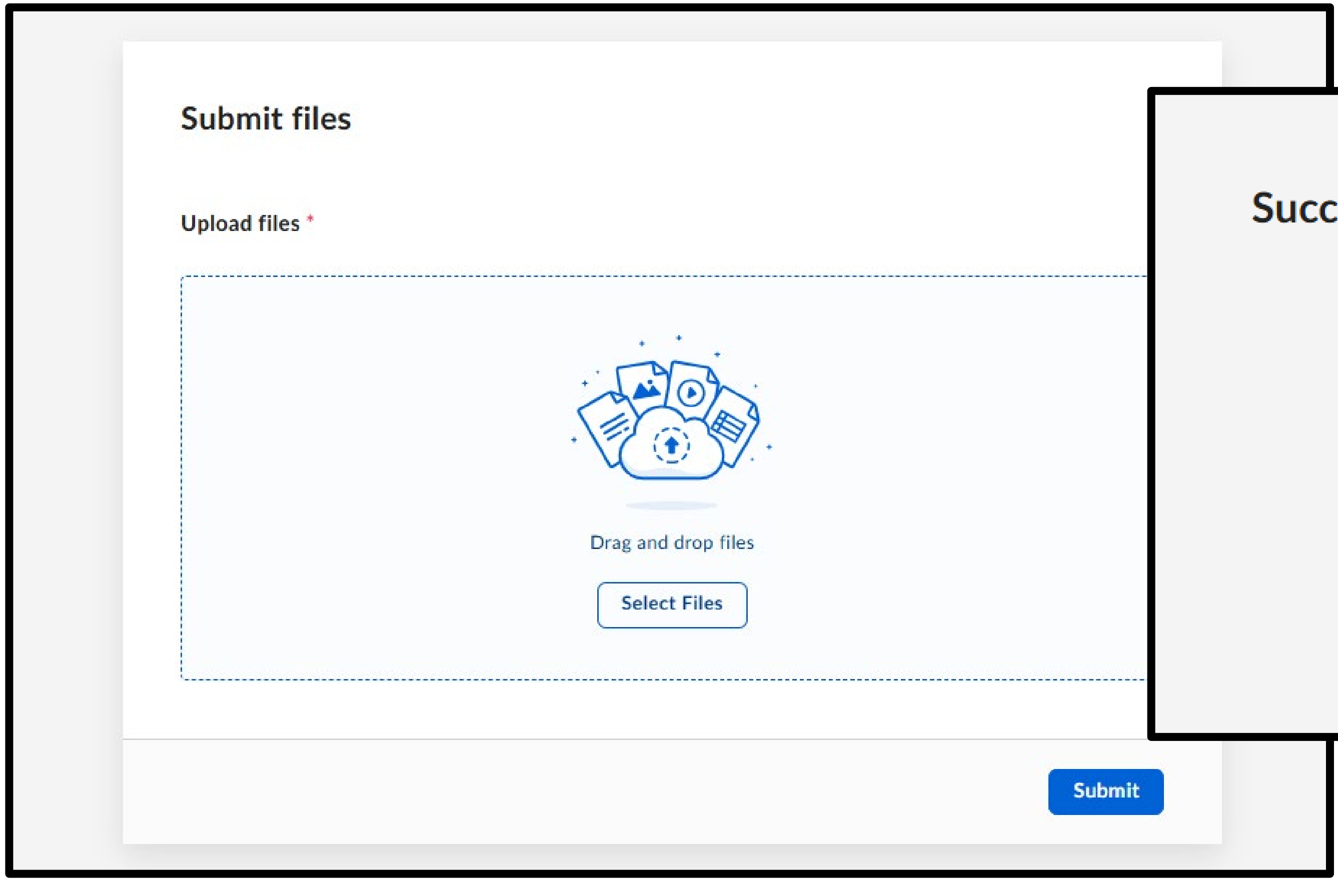


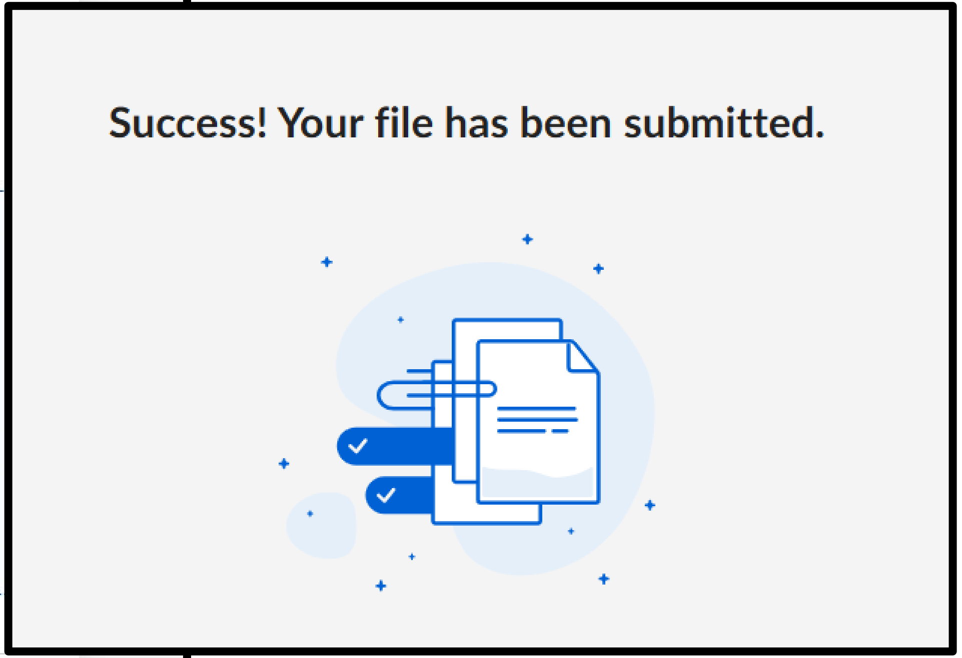


Once your expiration is set, copy the link and move over to your Case record. Create an Email or use an Email Template and insert the link for the facility to use

Obtaining a Facility Document

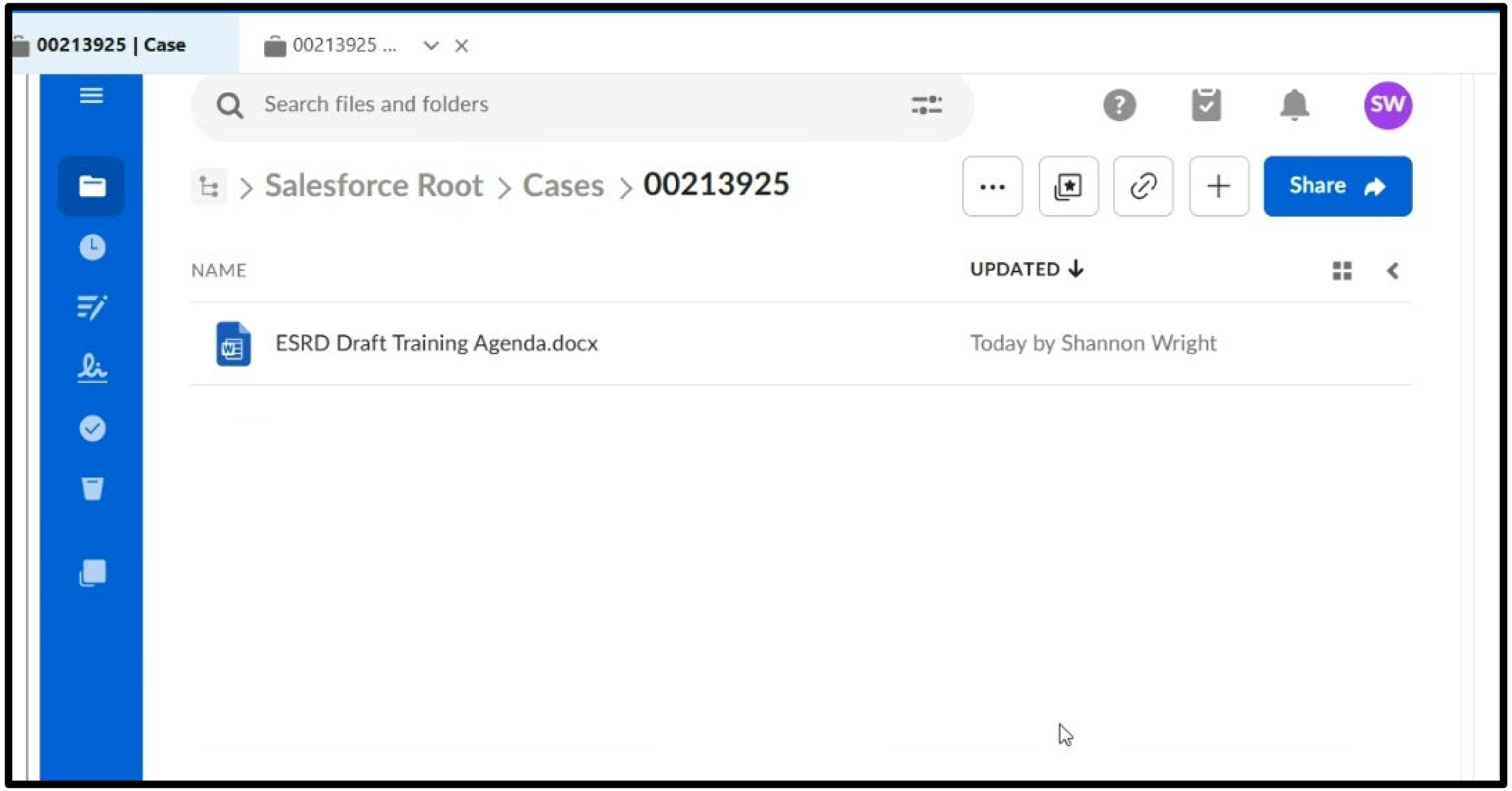
When the facility opens the file request link, they will be prompted with a Box screen to upload the file and submit. Once the file is submitted, the facility cannot retrieve or access the file. They will receive a screen notification when the file is uploaded successfully



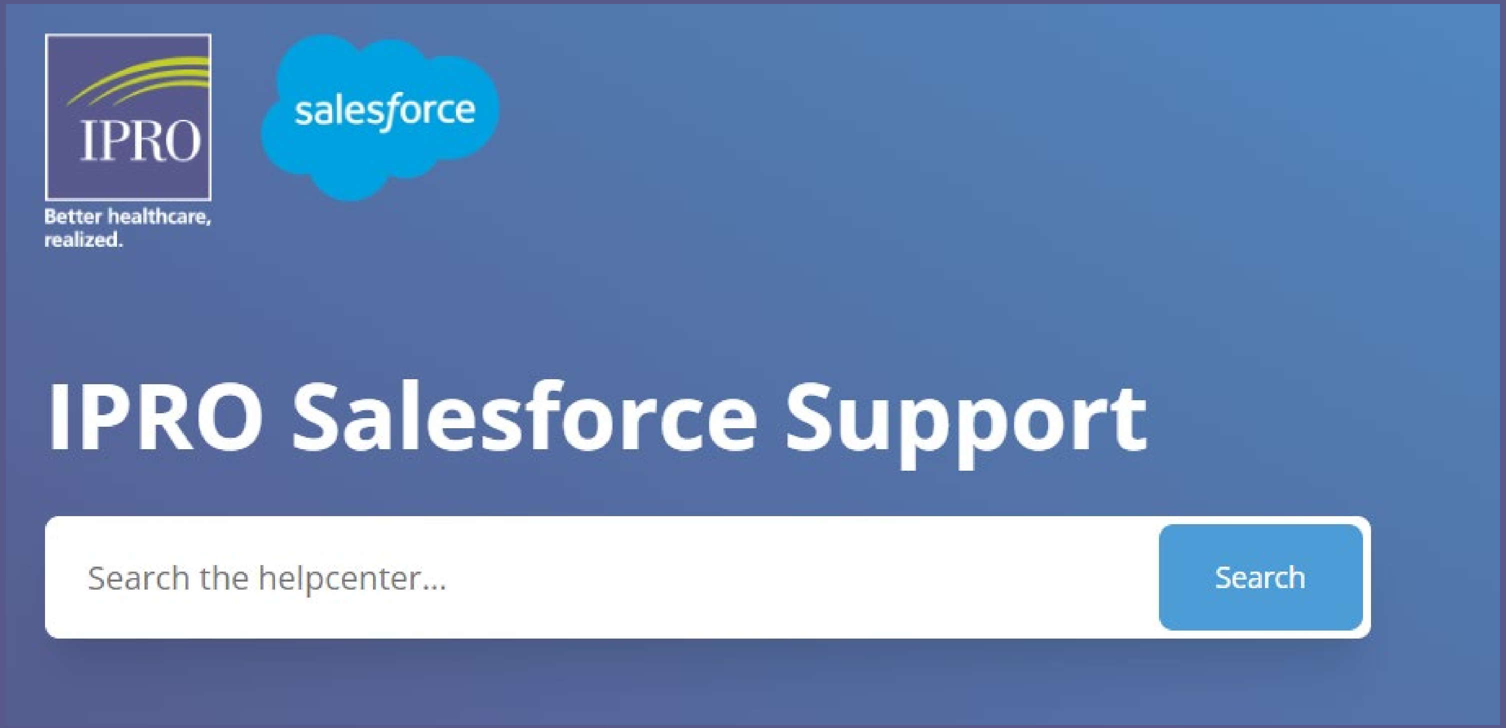


Obtaining a Facility Document

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?



IPRO

Better healthcare, realized.

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Lake Success, NY 11042-1072

http://ipro.org

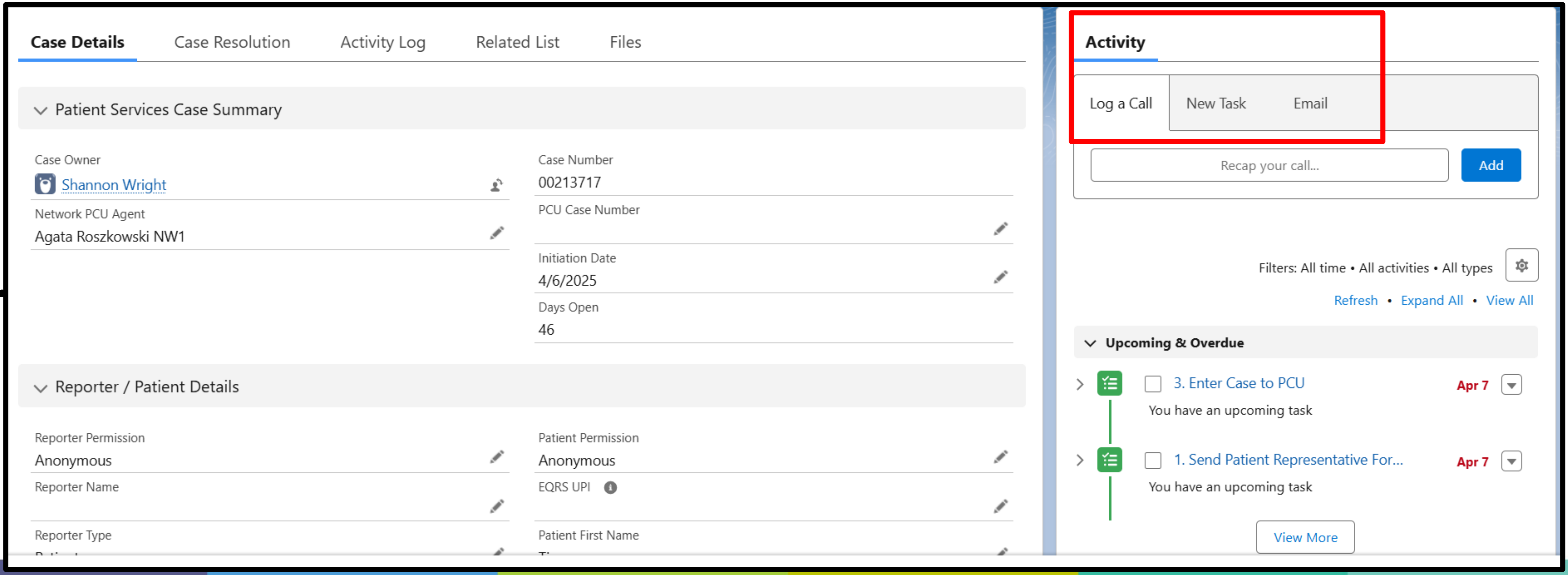
https://salesforce.ipro.help/hc/en-us

Appendix 1:
Patient Services
Example Activities

Activity Tracking

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

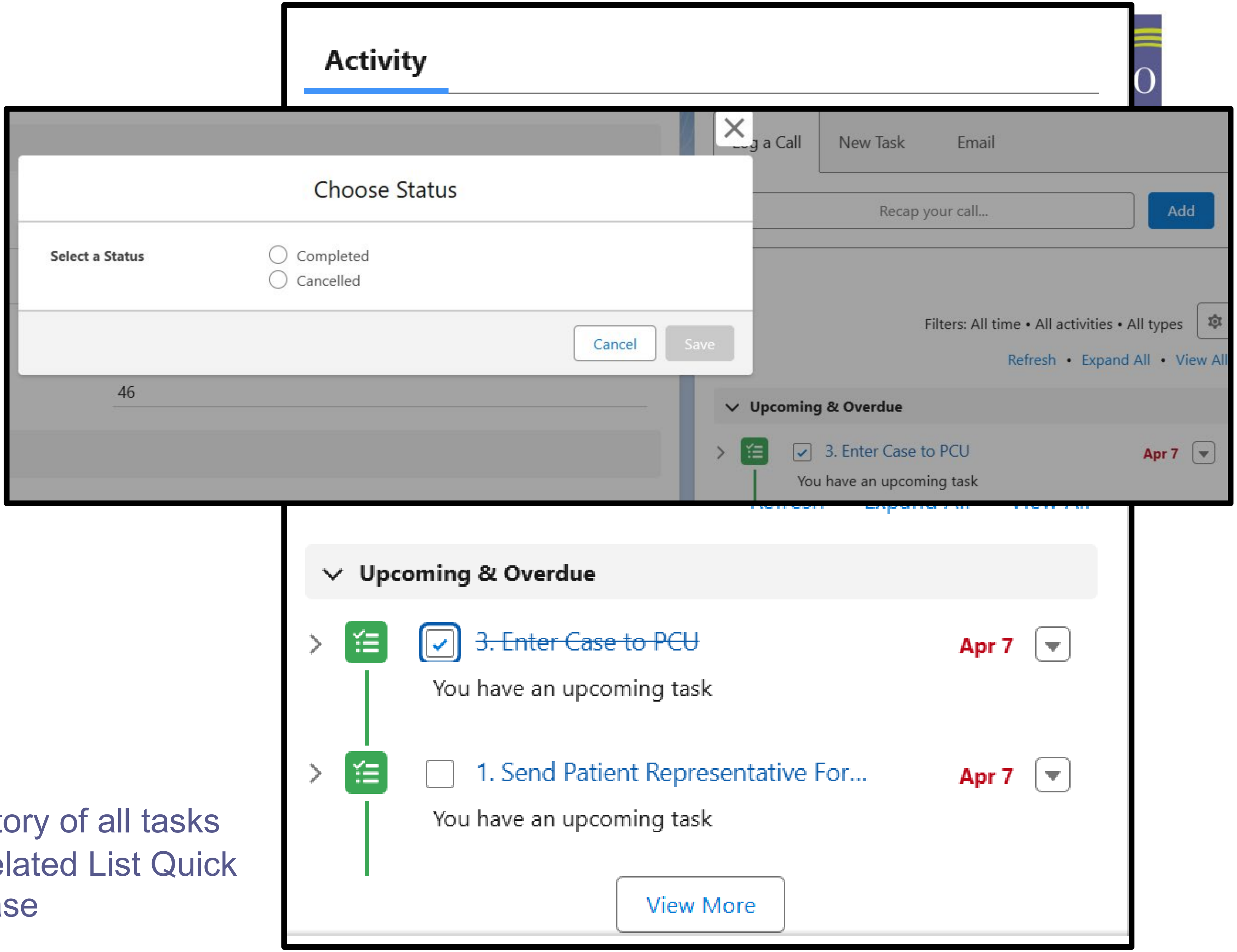
- Logging a Call
- Creating a New Task for yourself or other team members
- Creating and Sending emails either self generated or using email templates



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

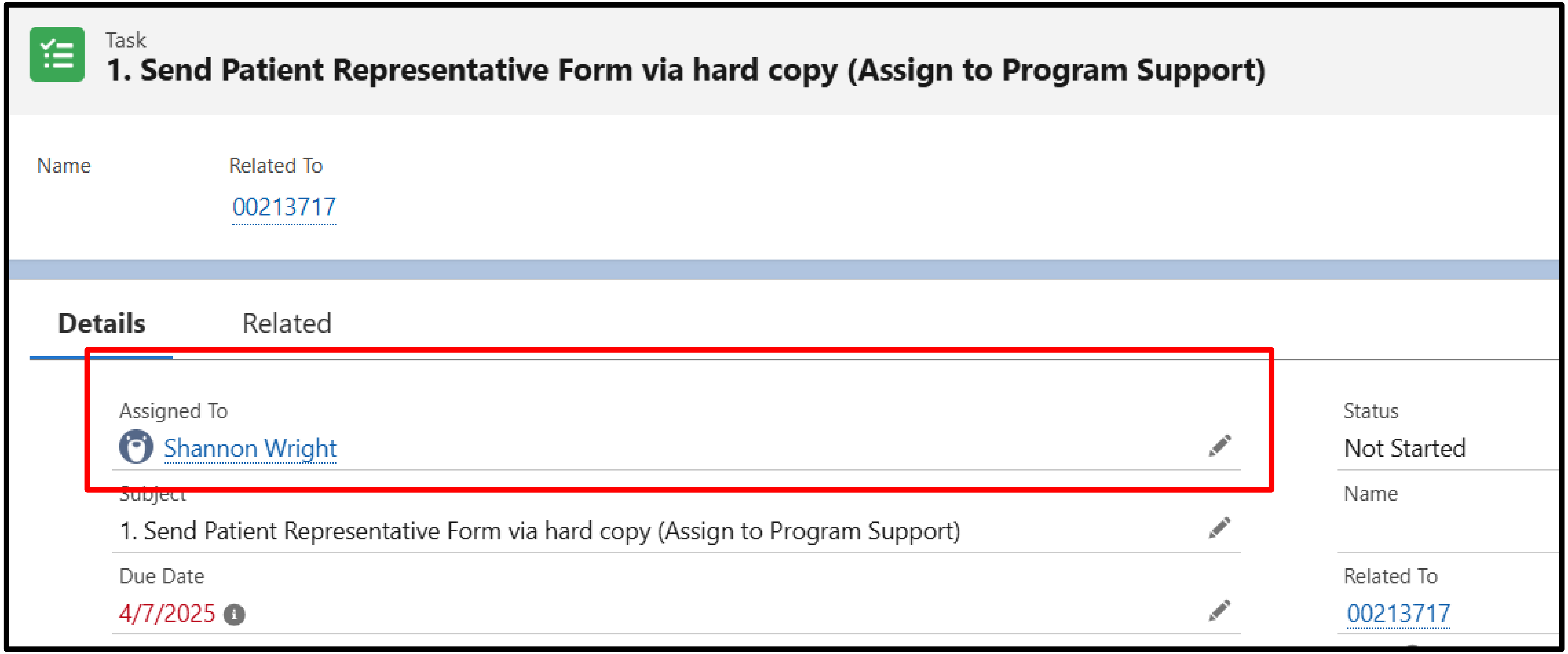


TIP: The Activity history of all tasks are available in the Related List Quick Links section of the case

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.

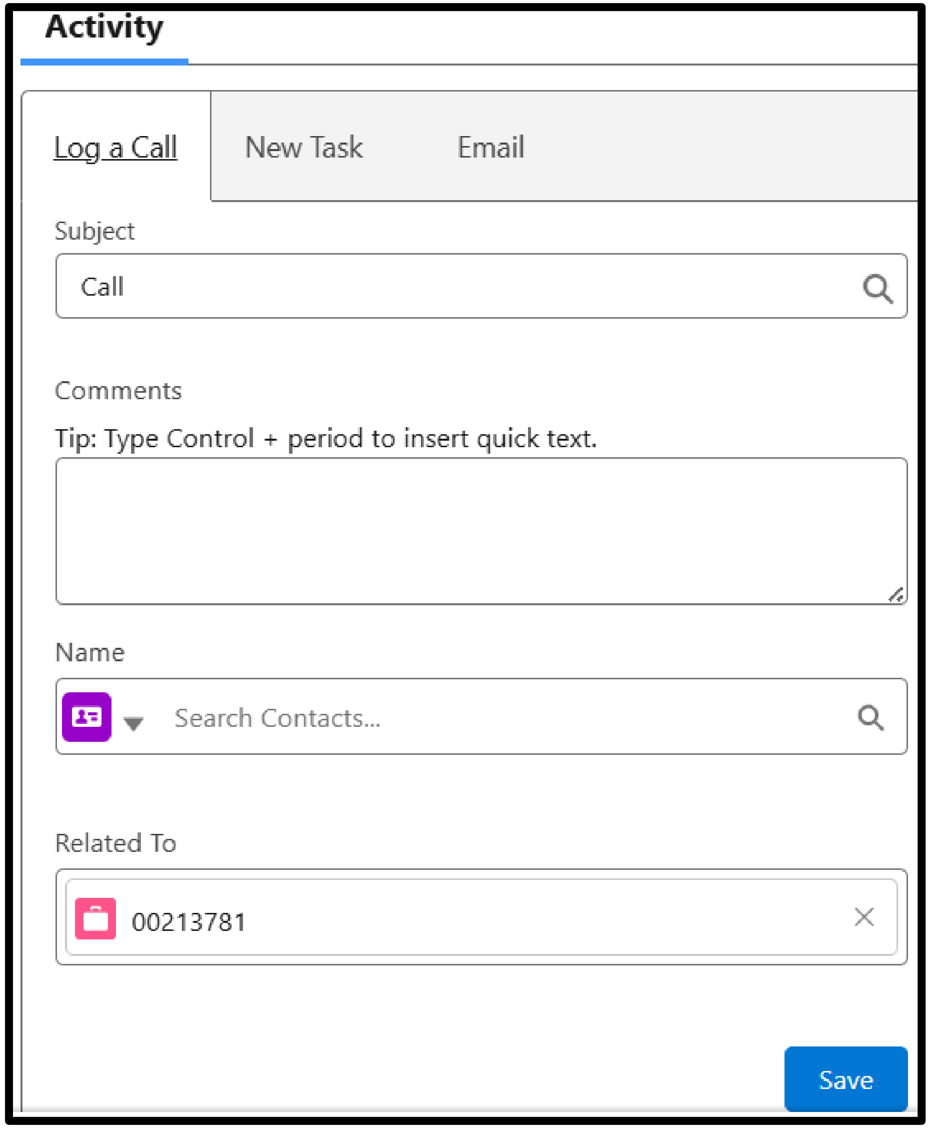


Activity Tracking

Logging a Call

You can log a call related to call by capturing the

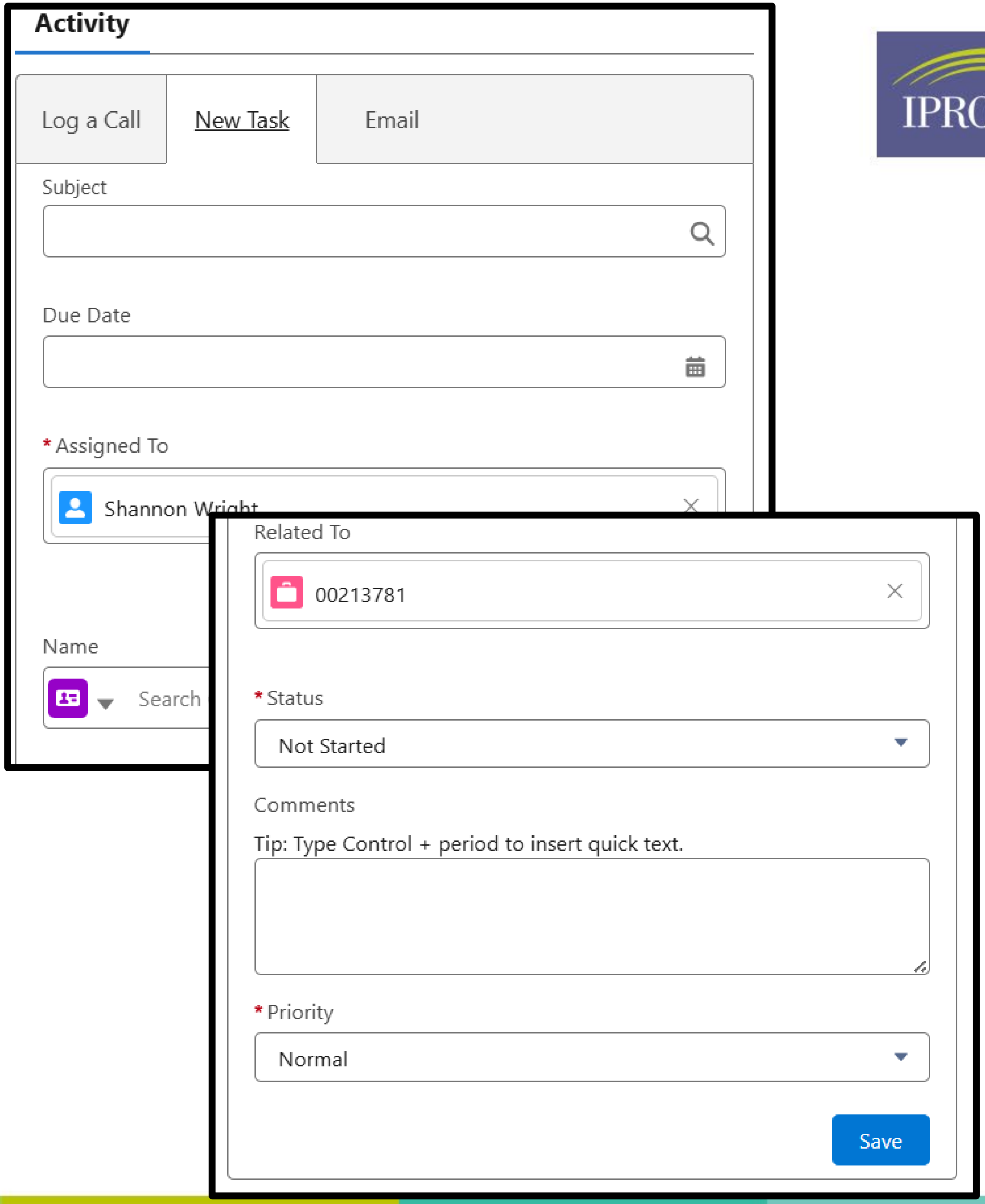
- Subject
- Add any notes related to the call in the comments section
- The case the call is related to will prepopulate when capturing this information from the case



Activity 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

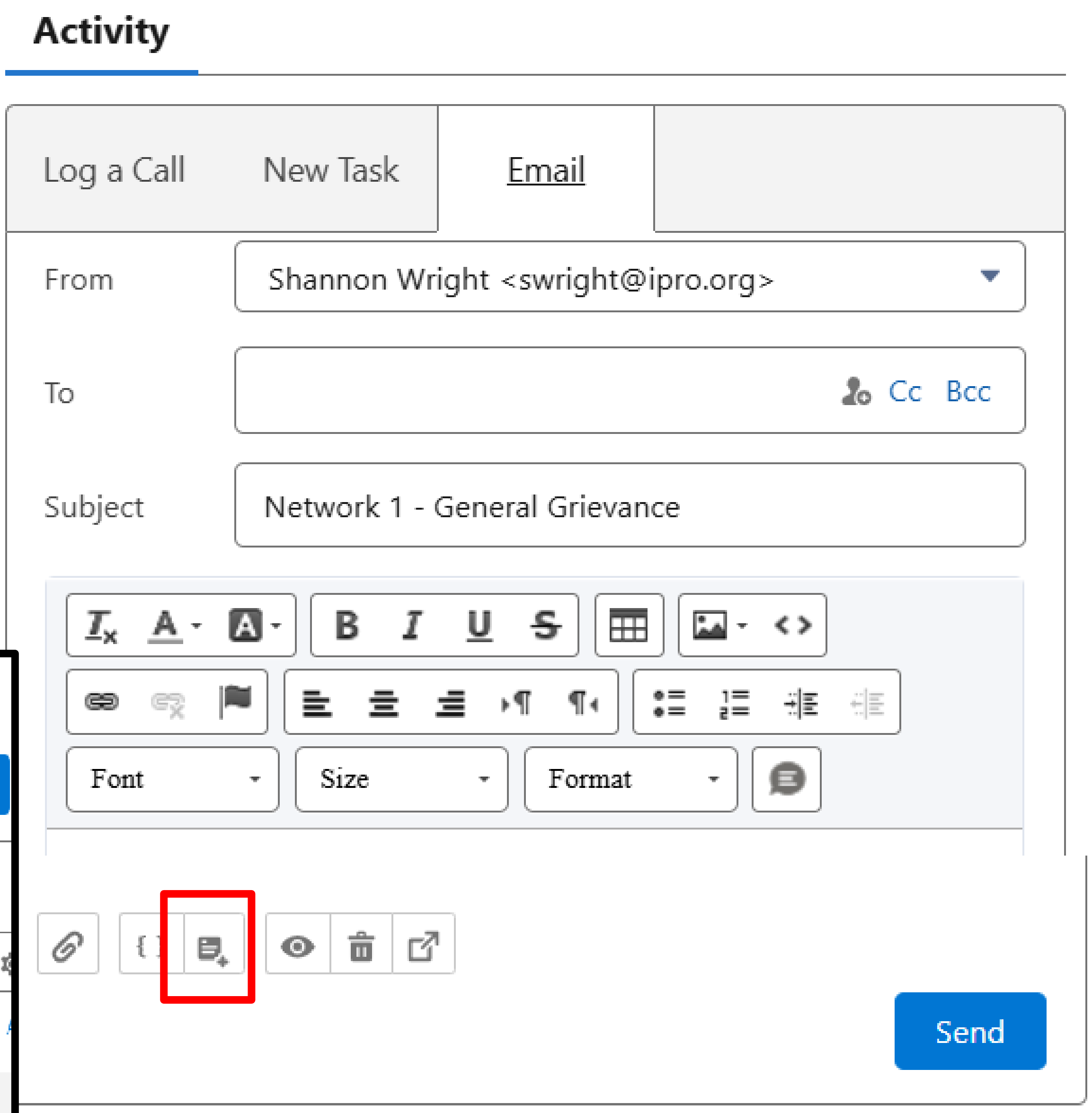


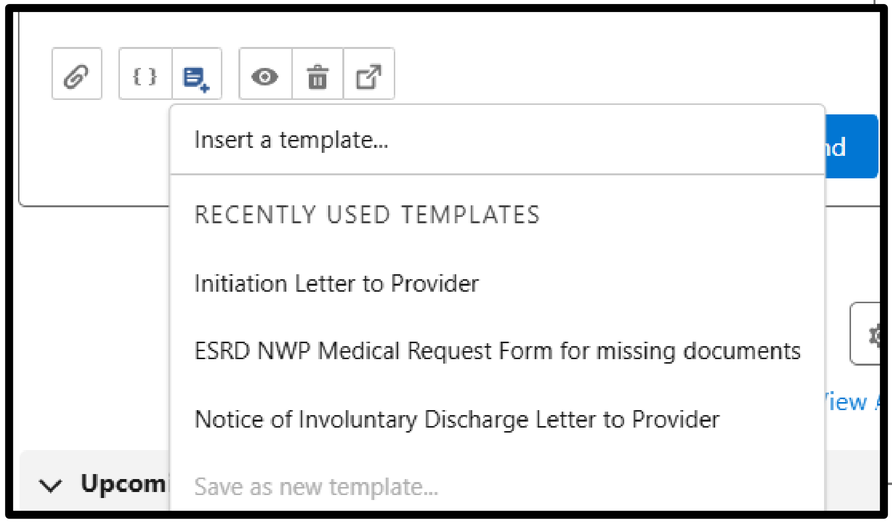
Activity Tracking

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

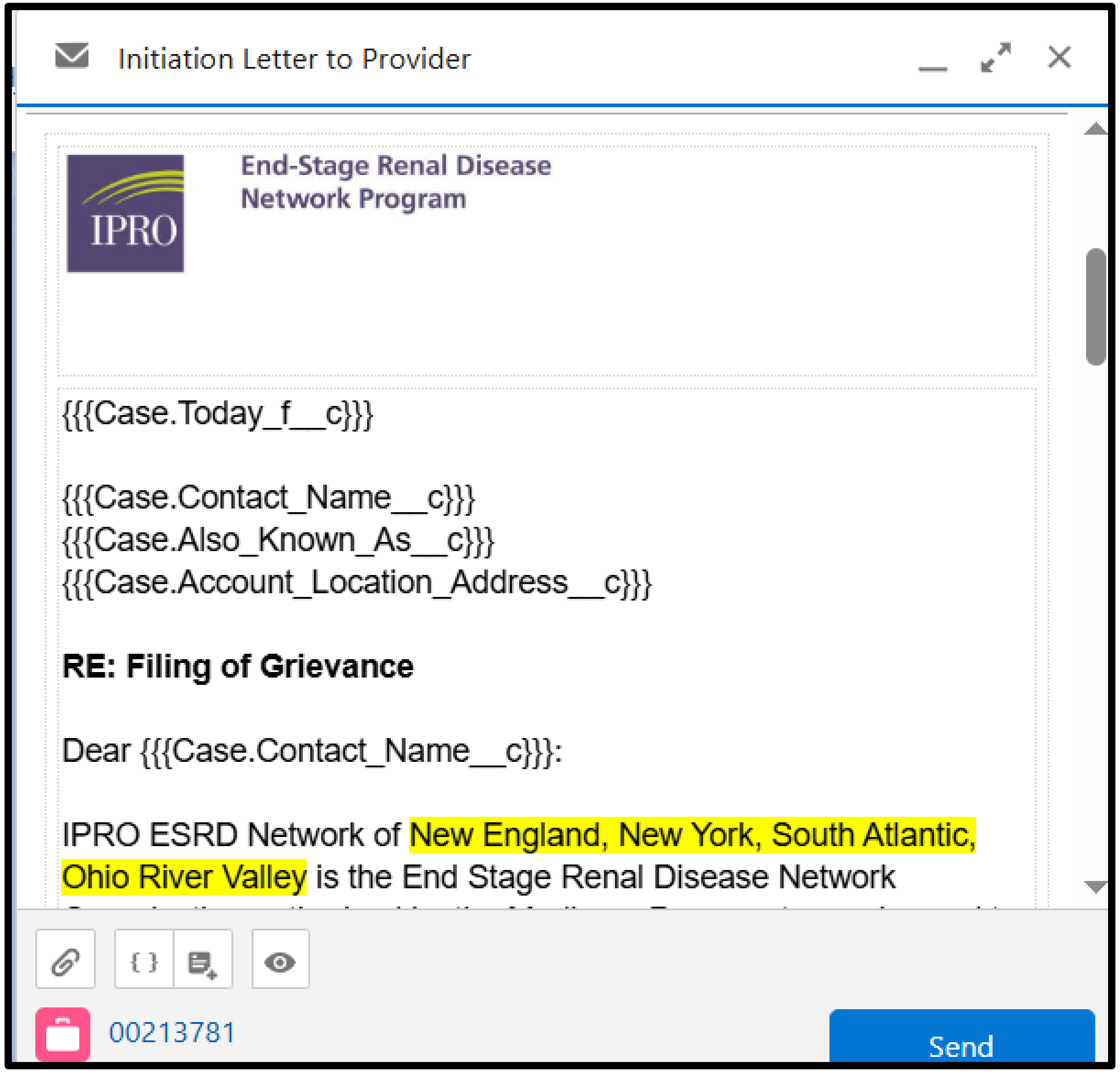




Activity Tracking

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.



Initiation Letter to Provider

IPRO End-Stage Renal Disease Network Program

{{{Case.Today_f__c}}}

{{{Case.Contact_Name__c}}}
{{{Case.Also_Known_As__c}}}
{{{Case.Account_Location_Address__c}}}

RE: Filing of Grievance

Dear {{{Case.Contact_Name__c}}}:

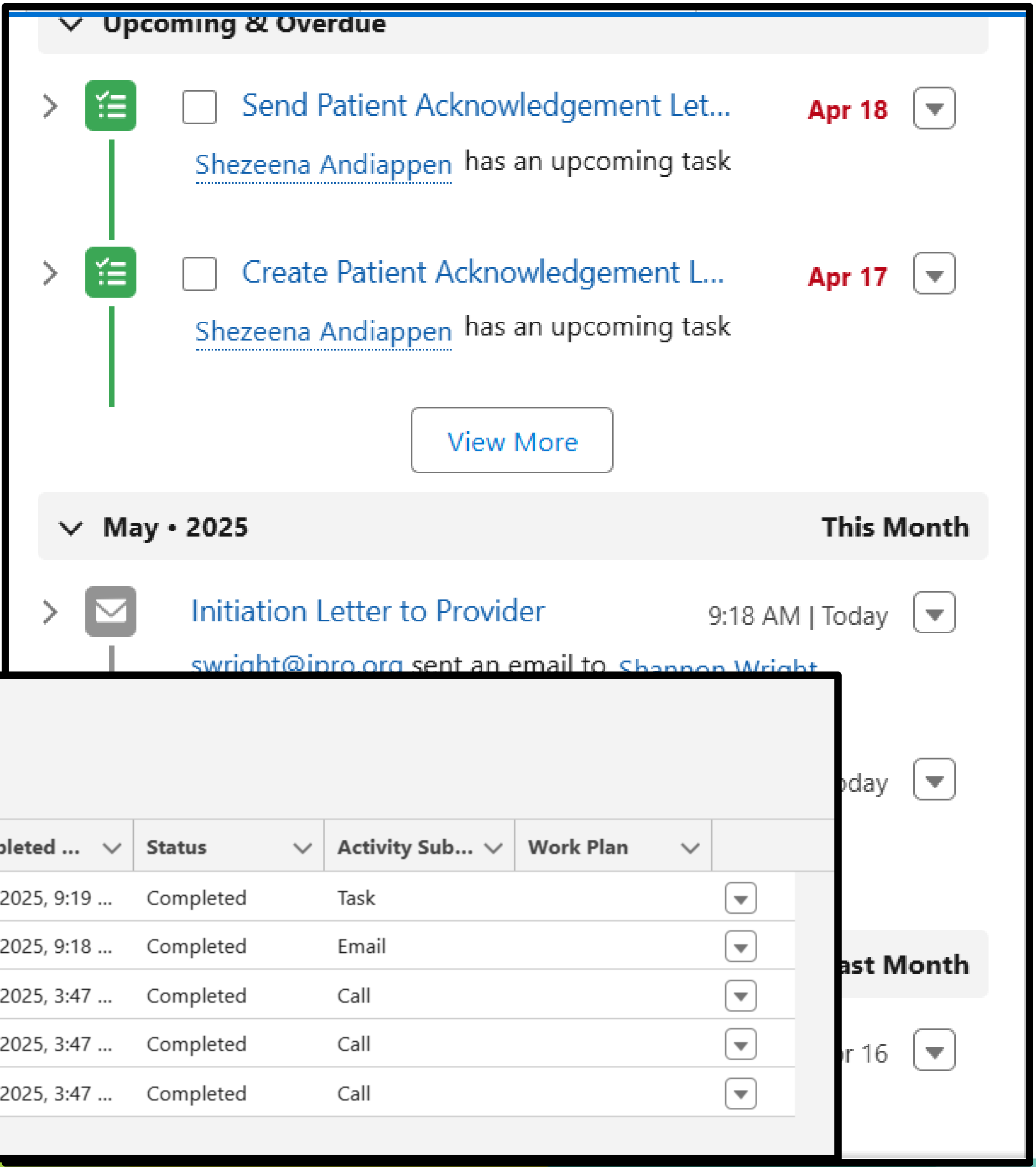
IPRO ESRD Network of New England, New York, South Atlantic, Ohio River Valley is the End Stage Renal Disease Network

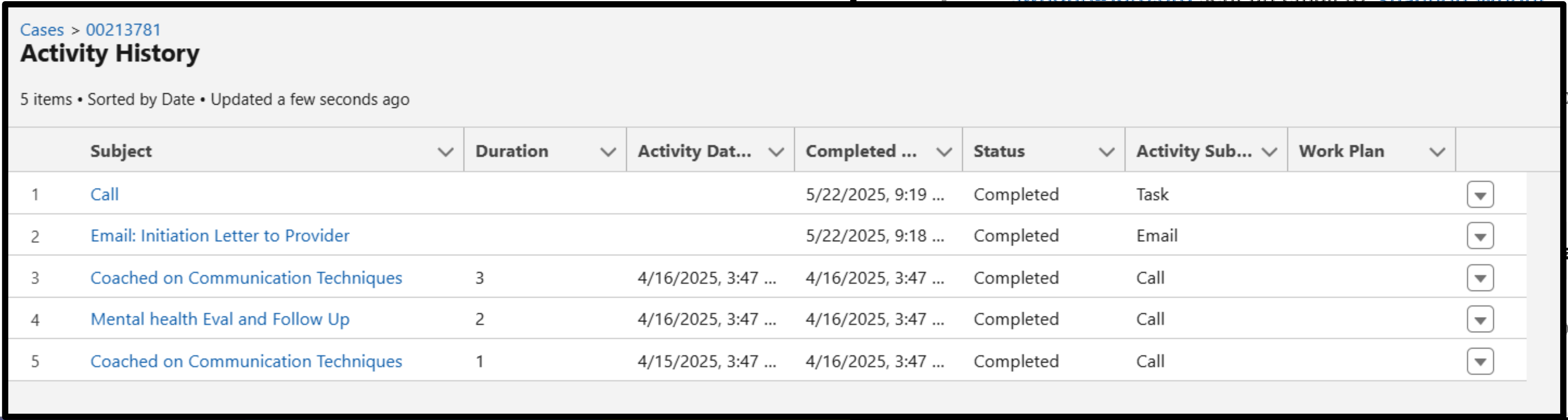
00213781

Send

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





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	