

# REC—Emergency PRA Clearance (CRM Tool Screenshots)

Reports: Home ~ salesforce.com - Enterprise Edition - Microsoft Internet Explorer

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Address <https://na1.salesforce.com/000/lo>

Setup Help & Train

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Reports Home Tell me more! Help for this page

Enter keywords to find matching custom reports.

Report Folders

Folder:

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- Dashboard Reports
  - [Edit](#) | [Del](#) | [Export](#) [QNC: # of NonPPCP's at Milestones by REC](#)
  - [Edit](#) | [Del](#) | [Export](#) [QNC: # of Opportunities by REC](#)
  - [Edit](#) | [Del](#) | [Export](#) [QNC: # of PPCP's at Milestones by REC](#)
  - [Edit](#) | [Del](#) | [Export](#) [REC: # of Providers at Each Milestone](#)
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- Standard CRM Reports
  - [Edit](#) | [Del](#) | [Export](#) [Activities: All my RECs Activities](#) - Shows all activities for all members of your REC. Shows both Open and Completed Activities.
  - [Edit](#) | [Del](#) | [Export](#) [Activities: My Closed Activities](#) - This report shows all your completed activities
  - [Edit](#) | [Del](#) | [Export](#) [Activities: My Open Activities](#) - Shows all Activities that are assigned to you that are still open.
  - [Edit](#) | [Del](#) | [Export](#) [Cases: My RECs Open and Closed Cases](#) - Shows all Cases submitted by members of your REC.
  - [Edit](#) | [Del](#) | [Export](#) [Cases: My RECs Open Cases](#) - Shows all Open Cases submitted by your REC. Use this report to track how many outstanding issues you have submitted to your PO.
  - [Edit](#) | [Del](#) | [Export](#) [Lead: All Leads for my REC](#) - Shows all Leads for your REC. Leads with a Lead Status of "New" still need to be contacted.
  - [Edit](#) | [Del](#) | [Export](#) [Lead: Lead Lifetime Report](#) - This report shows all Converted Leads for your REC. The report will also show the Organization, Contact and Opportunity created at Lead conversion.
  - [Edit](#) | [Del](#) | [Export](#) [Lead: Leads by Source](#) - Use this report to see where your Leads are being generated. When Users enter the "Lead Source" for their Leads you can see the Lead Source in this report.
  - [Edit](#) | [Del](#) | [Export](#) [Lead: My Leads](#) - Shows all of the Leads you own with a Lead Status of "New Lead". You can use this report to pull a list of your new Leads that need to be contacted.
  - [Edit](#) | [Del](#) | [Export](#) [Milestone: All Providers at Milestones](#) - This report will show the total number of Providers at each Milestone for your REC.
  - [Edit](#) | [Del](#) | [Export](#) [Milestone: Non-PPCP's at Milestones](#) - This report will show the total number of Non-Priority Primary Care (Non-PPCP's) Providers at each Milestone for your REC.
  - [Edit](#) | [Del](#) | [Export](#) [Milestone: PPCP's at Milestones](#) - This report will show the total number of Priority Primary Care (PPCP's) Providers at each Milestone for your REC.
  - [Edit](#) | [Del](#) | [Export](#) [Oppty: All Opportunities for my REC](#) - Use this report to see a list of all the Opportunities owned by everyone in your REC.
  - [Edit](#) | [Del](#) | [Export](#) [Oppty: My Opportunities by Stage](#) - This report will show all of the Opportunities you own sorted by their Stage.
  - [Edit](#) | [Del](#) | [Export](#) [Org: All Organizations with Demographics](#) - This report will include all data points around demographics.
  - [Edit](#) | [Del](#) | [Export](#) [Organization: Closed List Organizations](#) - Use this report to show all Organizations you have contacted who did not want to sign an agreement with the REC.

**Content Search**

Workspaces

Search

### Content Workspaces

Overview

Use the tabs below to view and manage shared workspaces or your personal workspace.

**Content Items**

- Massachusetts Technology Park Cooperation
- Rhode Island Quality Institute
- Jennie Chiller
- Kristen Doherty
- Cedric Priebe, MD
- Gary Christensen
- Laura Adams
- Rick Shoup

[Recycle Bin](#)

Shared Content | My Personal Content

#### My Workspaces

Actions	Workspace Name
<a href="#">Browse</a>	CoP - Communications and Outreach
<a href="#">Browse</a>	CoP - Financials and Operations
<a href="#">Browse</a>	CoP - Implementation and Project Mgmt
<a href="#">Browse</a>	CoP - Interoperability and HIE
<a href="#">Browse</a>	CoP - Meaningful Use
<a href="#">Browse</a>	CoP - Privacy and Security
<a href="#">Browse</a>	CoP - Project Directors
<a href="#">Browse</a>	CoP - Salesforce.com CRM
<a href="#">Browse</a>	CoP - Vendor Selection/Group Purchasing
<a href="#">Browse</a>	CoP - Workflow Redesign

#### Popular Tags

Sort Alphabetically | Sort By Popularity

American Recovery and Re... Answers ARRA ARRA Reporting certification Communications Communities of Practice

**Community of Practice** contact information CRM CRM Lead **Cycle 1** Education and Outreach Fadesola Adetosoye Functional Interoperabili... Implementation Leads Mat Kendall Meaningful Use Meeting Minutes Office of Provider Adopti... Office of the National Co... outreach Presentation Privacy and Security REC **REC Kick-Off Meeting** REC Leads Salesforce training Vendor Selection and Grou...

#### Top Content

Title	Author	Publication Date
New York EHR Meaningful Use Summit Flyer	Micky Tripathi	16 hours ago
NYeC REC Outreach Agent Certification 05-Apr-2010 clean	Micky Tripathi	16 hours ago
NYeC REC Implementation Agent Certification 05-Apr-2010	Micky Tripathi	16 hours ago
Outreach Agent Data Template 04-02-2010	Micky Tripathi	16 hours ago
Implementation Agent Data Template 30-Mar-2010	Micky Tripathi	16 hours ago
NYeC REC Agent Certification 06-Apr-2010	Micky Tripathi	16 hours ago
http://finance.yahoo.com/news/New-Yorks-Primary-Care-bw...	Micky Tripathi	16 hours ago
NYeC REC Outreach Agent Kickoff 06-May-10 v1	Micky Tripathi	17 hours ago
NYeC REC Implementation Agent Kickoff 06-May-10 v3	Micky Tripathi	17 hours ago

#### Recent Activity

- Micky Tripathi published New York EHR Meaningful Use Summit Flyer into CoP - Communications and Outreach 16 hours ago
- Micky Tripathi published NYeC REC Outreach Agent Certification 05-Apr-2010 clean into CoP - Implementation and Project Mgmt 16 hours ago
- Micky Tripathi published NYeC REC Implementation Agent Certification 05-Apr-2010 clean into CoP - Implementation and Project Mgmt 16 hours ago
- Micky Tripathi published Outreach Agent Data Template 04-02-2010 into CoP - Implementation and Project Mgmt 16 hours ago
- Micky Tripathi published Implementation Agent Data Template 30-Mar-2010 into CoP - Implementation and Project Mgmt 16 hours ago

### Milestone All Providers at Milestones

**Report Generation Status:** The report returned no results.

**Report Options:**

Summarize information by: Milestone View: All organizations

**Time Frame**

Columns: Created Date Duration: Current FY

Start Date: 1/1/2010 End Date: 12/31/2010

[Run Report](#) [Hide Details](#) [Customize](#) [Save As](#) [Printable View](#) [Export Details](#)

#### Generated Report:

Filtered By: [Edit](#)  
**Primary Contact Record Type** equals **Provider** [Clear](#)  
**AND Participating Provider** equals **True** [Clear](#)  
**AND Milestone** not equal to - [Clear](#)

Organization Name	First Name	Last Name	1: Sign-Up	2: Go-Live	3: Meaningful Use
Grand Totals (0 records)					

Check rows above to filter to just those rows, then drill down by: --None-- [Drill Down](#)

#### Generated Chart:

Edit Large | Medium | Small

The report returned no results.

Internet Explorer - https://na1.salesforce.com/a007fcf=00630000006gJkd

REC CRM

Home RECs Cases Organizations Primary Contacts Reports Ideas Answers Workspaces Content

All RECs [New REC](#)

Create New View | Refresh

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Action	REC Name	Main REC Phone	Mailing City	Mailing State
<a href="#">Edit</a>	<a href="#">Altarum Institute, Michigan</a>	(734) 302-4600	Ann Arbor	MI
<a href="#">Edit</a>	<a href="#">Arkansas Foundation For Medical Care</a>	(501) 212-8616	Little Rock	AR
<a href="#">Edit</a>	<a href="#">CalHIPSO (North)</a>			
<a href="#">Edit</a>	<a href="#">CalHIPSO (South)</a>			
<a href="#">Edit</a>	<a href="#">CIMRO of Nebraska</a>	(402) 476-1700	Lincoln	NE
<a href="#">Edit</a>	<a href="#">Colorado Regional Extension Center</a>	(720) 285-3200	Denver	CO
<a href="#">Edit</a>	<a href="#">District of Columbia Primary Care Association</a>			DC
<a href="#">Edit</a>	<a href="#">Fund for Public Health, New York</a>			NY
<a href="#">Edit</a>	<a href="#">Greater Cincinnati HealthBridge (Ohio-Kentucky)</a>			OH
<a href="#">Edit</a>	<a href="#">HealthInsight, Utah-Nevada</a>	(800) 483-0932	Salt Lake City	UT
<a href="#">Edit</a>	<a href="#">Iowa IFMC</a>	(800) 373-2964	West Des Moines	IA
<a href="#">Edit</a>	<a href="#">Kansas Foundation for Medical Care, Inc.</a>	(785) 273-2552	Topeka	KS
<a href="#">Edit</a>	<a href="#">Key Health Alliance (Stratis Health), Minnesota North</a>			MN
<a href="#">Edit</a>	<a href="#">Lovell Clinic, New Mexico</a>			NM
<a href="#">Edit</a>	<a href="#">Massachusetts Technology Park Cooperation</a>	(617) 371-3999	Somerville	MA
<a href="#">Edit</a>	<a href="#">MetaStar, Inc., Wisconsin</a>	(608) 729-2700	Madison	WI
<a href="#">Edit</a>	<a href="#">Morehouse School of Medicine, Inc., Georgia</a>	(404) 752-1015	Atlanta	GA
<a href="#">Edit</a>	<a href="#">New York eHealth Collaborative (NYeC)</a>			NY
<a href="#">Edit</a>	<a href="#">Northern Illinois University</a>	(815) 753-1136	DeKalb	IL
<a href="#">Edit</a>	<a href="#">Northwestern University</a>	(312) 503-2986	Chicago	IL
<a href="#">Edit</a>	<a href="#">OCHIN Inc. (Primary), Oregon</a>	(503) 943-2500	Portland	OR
<a href="#">Edit</a>	<a href="#">Ohio Health Information Partnership</a>	(614) 340-1839	Columbus	OH
<a href="#">Edit</a>	<a href="#">Oklahoma Foundation for Medical Quality, Inc.</a>		Oklahoma City	OK
<a href="#">Edit</a>	<a href="#">Purdue University</a>	(765) 496-1911	West Lafayette	IN
<a href="#">Edit</a>	<a href="#">Qsource (Tennessee)</a>	(866) 514-8595	Nashville	TN

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