

REC—Emergency PRA Clearance (CRM Tool Screenshots)

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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.

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[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 show all of the Organizations for your REC. The report will include all data points around demographics.

[Edit](#) [Del](#) [Export](#) [Organization: Closed Lost Organizations](#) - Use this report to show all Organizations you have contacted who did not want to sign an agreement with the REC.

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Milestone

All Providers at Milestones

Help for this Pa

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.

10

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REC CRM

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All RECs

New REC

Create New View | Refresh

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

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