

# REC—Emergency PRA Clearance (CRM Tool Screenshots)

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

File Edit View Favorites Tools Help

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

Setup Help & Train

Home RECs Cases Organizations Primary Contacts **Reports** Ideas Answers Workspaces Content

Reports Home Tell me more! Help for this page

Enter keywords to find matching custom reports.

Report Folders

Folder:

All Reports Recent Reports Reorder Folders | Collapse All | Expand All

- My Personal Custom Reports
- Untitled Public Reports
  - [Edit | Del | Export](#) Modified Nurse Practitioners
- 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
  - [Edit | Del | Export](#) REC: Opportunities by Stage
  - [Edit | Del | Export](#) REC: Programs Starting This Month
- 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](#) Oppy: 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](#) Oppy: 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 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

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

[Recycle Bin](#)

**Content Workspaces**  
 Overview  
 Tell me more! Help for this Page

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

Shared Content | My Personal Content

**My Workspaces**

Actions	Workspace Name
Browse	CoP - Communications and Outreach
Browse	CoP - Financials and Operations
Browse	CoP - Implementation and Project Mgmt
Browse	CoP - Interoperability and HIE
Browse	CoP - Meaningful Use
Browse	CoP - Privacy and Security
Browse	CoP - Project Directors
Browse	CoP - Salesforce.com CRM
Browse	CoP - Vendor Selection/Group Purchasing
Browse	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** Category: Publication Date

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  
 Help for this Page

**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

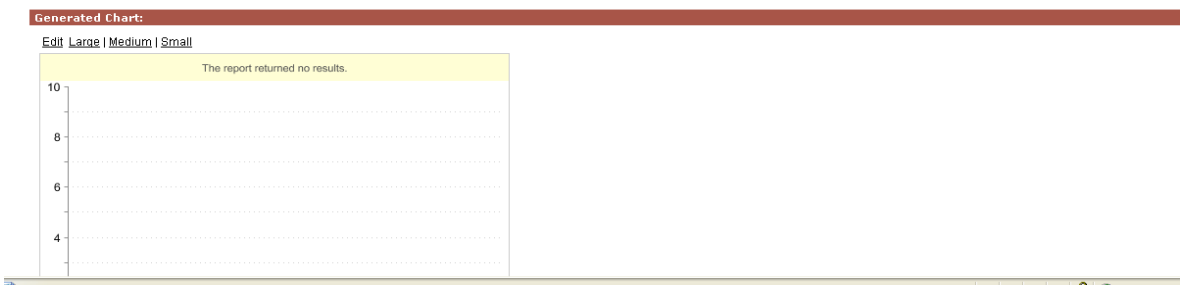
Run Report Hide Details Customize Save As Printable View Export Details

**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**



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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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