

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

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](#) [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 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

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

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:



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
Edit	Altarum Institute, Michigan	(734) 302-4600	Ann Arbor	MI
Edit	Arkansas Foundation For Medical Care	(501) 212-8616	Little Rock	AR
Edit	CalHIPSO (North)			
Edit	CalHIPSO (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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