

# REC—Emergency PRA Clearance (CRM Tool Screenshots)

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

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Report Folders

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  - [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.

**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

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:**

Edit Large | Medium | Small

The report returned no results.

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            |