SALESFORCE OVERVIEW OF COMMUNITY BASED EXPERIENTIAL TRAINING (CBET) ROTATIONS
Rural Health Professions Programs
Module #3A
October 2023
AGENDA

AzAHEC Overview
SalesForce Overview
SalesForce Data Entry
SalesForce Dashboards
Arizona AHEC receives federal fund and state funds to support:
- COMMUNITY BASED EXPERIENTIAL TRAINING (CBET)
- PIPELINE AND PATHWAYS PROGRAMS & HEALTH CAREER EVENTS
- CONTINUING EDUCATION & CONTINUING PROFESSIONAL DEVELOPMENT

AzAHEC reports outcomes to funders:
- Metrics
- Narratives

AzAHEC reports activities for these program partners:
- Rural Health Professions Programs (RHPPs) and South Campus Medical Residency
  - Complete CBET only
- Arizona AHEC Regional Centers
  - Complete all reporting categories

Program Partners receive support from AzAHEC based on prior year’s reported metrics:
- Annual budgets with partner-identified metrics are provided to RHPPs by AzAHEC through an award letter.
- Annual budgets with partner-identified metrics are provided to Centers by AzAHEC through a contract.
Arizona AHEC Regional Centers

Arizona AHEC supports Six AzAHEC Regional Centers:

- American Indian Health AHEC
- Central Arizona AHEC
- Center for Excellence in Rural Education (CERE) AHEC
- Colorado Plateau Center for Health Professions
- Southern Arizona AHEC
- Western Arizona AHEC
Rural Health Professions Programs

Arizona AHEC supports nine Rural Health Professions Programs (RHPPs) at Arizona Board of Regents (ABOR) institutions:

- ASU College of Nursing and Health Innovation
- UA College of Medicine – Phoenix
- UA College of Medicine – Tucson
- UA College of Nursing
- UA College of Pharmacy
- UA College of Public Health
- NAU School of Nursing
- NAU Department of Physician Assistant Studies
- NAU Physical Therapy Program
SalesForce is a Customer Relations Management (CRM) Software Customized for AzAHEC beginning in 2016

Both RHPPs and Centers utilize SalesForce to report and review CBET metrics:

- Report trainee, preceptor/site and rotation dates/hours;
- Utilize their program’s dashboard to assure accuracy (e.g., inclusion of all trainees)
- May download their own data entered the system via standard reports
Salesforce Data Entry
Data Reporting by CBET Partners

RHPPs report their metrics in SalesForce as follows:

• Enter projected rotations within 3 days of start of rotations;
  Projected rotations may not occur as planned
  ➢ only confirmed rotations count toward award metrics
• Enter confirmed rotations within 30 days of end date of rotations
• Approximately 10% of 2022/24 rotations are associated with Center support

Centers report their metrics in SalesForce as follows:

• Enter rotations for non-ABOR/non-RHPP trainees within 3 days of start of rotations; AND
• May be associated with a rotation initiated by an RHPP
  • Center must cite what occurred to support rotation (e.g., housing, stipend, etc.)

Beginning in fiscal year 2023/24:

• Center may establish a new rotation for an RHPP student if:
  • projected or confirmed rotation has not been entered by RHPP four or more days after start of rotation
Students from non-ABOR Schools or non-RHPP students within ABOR Schools who participate in underserved or rural rotations

RHPP initiated and reported rotations which are supported by a Regional Center

Students who participate in an underserved or rural rotations

RHPP Initiated ROTATIONS

Associated Field Experiences

CENTER Initiated ROTATIONS
When to Project Rotations

RHPPs submit a projected rotation form for each field experience within three days of the rotation start date.

➢ Within Salesforce, this creates a “Rotation (R)” record and is assigned a unique “R-00000” number.
➢ The projected rotation form contains a field for the RHPPs to associate a regional center.
How to Project Rotations

RHPPs project rotations with these steps:

1. Log onto Salesforce using your program’s unique URL, username and password
2. Click “RHPP Projected Rotation Web Form” at the top of the homepage
3. Complete the form by filing out required fields (all fields marked with a red asterisk)
4. Submit form
Helpful Tip: Projected Rotations Form

• This is called a “look-up” field and connects to the Salesforce database.
• Click within the box to search the database to see if a student is already in the system before creating a new record.
• This will avoid duplicate entries and save you time!

![Search for the Student](image-url)

Search for the Student
Search using the Student's first name, last name, or email. If the Student is Not Found, Check the Box to Create a New Student.
Click the Magnifying Glass to search for the student.
Student Name*

* - required
When to Confirm Rotations

• RHPPs submit a confirmed rotation form for field experience within 30 days of the rotation end date.
  ➢ Within Salesforce, this creates a “Field Experience (FE)” record and is assigned a unique “FE-00000” number.
How to Confirm Rotations

RHPPs confirm rotations with these steps:
1. Log onto Salesforce using your program’s unique URL, username and password
2. Two options are available to confirm rotations:
   ➢ Through the Dashboard:
     • Click on “view report” on the projected field experience tile on dashboard
     • Locate the projected rotation to be confirmed
     • Click on the unique “confirmed rotation web form link”
     • Complete the required fields and hit “submit”

   or

   ➢ Through the Salesforce Homepage:
     • Scroll to the last section on the homepage to find the list view entitled “RHPP-Projected Rotations”
     • Locate the projected rotation to be confirmed
     • Click on the unique “confirmed rotation web form link”
     • Complete the required fields and hit “submit”
Helpful Tip: Confirmed Rotations Form

• Some of the form will auto-populate with:
  1) Existing information in Salesforce
  2) Information entered on the projected rotation form

• This information can be updated while completing the confirmed rotation form
RHPP Salesforce Dashboard Overview

Each RHPP has two dashboards on their Salesforce homepage:

- Dashboards are critical for RHPPs to review to ensure all reported CBETS are accurate and complete.
  - Comparison to internal records should occur regularly by RHPPs
- First dashboard is the “Rotations Dashboard”
  - Tiles for projected rotations, confirmed rotations, and validated rotations.
    ➢ Validated rotations are those that have been determined to be reportable by the Program Office to HRSA.
- Tiles on all dashboards contain imbedded spreadsheets that provides details of information summarized on the tile.
  ➢ Imbedded spreadsheet contains hyperlinks to data reported.
  ➢ Spreadsheets can be downloaded and analyzed as needed.
A CLOSER LOOK:
2023-24 RHPP ROTATIONS DASHBOARD

This tile reflects the number of submitted projected rotations by your program. Each tile contains a clickable 'view report' button on the bottom. This report contains more information about each rotation and its contents can be exported into an excel file.

This tile reflects all confirmed rotations submitted by your program. These rotations have not yet been validated by the program office.

This tile reflects all confirmed rotations by your program and that have been validated by the program office for reporting purposes.
RHPP Salesforce Dashboard Overview

• Second dashboard is the “Contract Achievement Dashboard”
  • Tiles for unique students, rotations and hours reported toward award achievement metrics.

• Tiles on all dashboard contain imbedded spreadsheets that provides details of information summarized on the tile.
  ➢ Imbedded spreadsheet contains hyperlinks to data reported.
  ➢ Spreadsheets can be downloaded and analyzed as needed.
A CLOSER LOOK: 
2023-24 RHPP Contract Achievement Dashboard

This tile reflects all validated unique students supported and progress (in percentage) towards the identified award letter metric.

This tile reflects the number of validated rotation hours supported and progress (in percentage) towards the identified award letter metric.
Timing of RHPP Entries

**RHPP Rotation Entry Timeframes**

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Projected Rotation Entry</td>
<td>Within 3 days of Start Date of Rotation</td>
</tr>
<tr>
<td>Confirmed Rotation Entry</td>
<td>Within 30 days of End Date of Rotation</td>
</tr>
</tbody>
</table>

**Delays in projecting and confirming CBETs in SalesForce result in:**

- Unreported/underreported metrics by RHPP in comparison with projections
  - Inconsistency between SalesForce data and submitted narrative reports
- Unreported/underreported rotation support by Centers
- Uncollected surveys required by funders
Correct sequence of reporting CBETS
RHPPs enters CBETs at least three days prior to start of rotation.
Center, as appropriate, associates allowable activities for the CBET only after RHPP has projected it.
RHPP confirms rotation no more than 30 days after the end

Incorrect sequence of reporting
Scenario #1
RHPP does not enter CBET until four or more days after start of rotation.
Impact #1: Required evaluations to students are not generated.
Impact #2: If CBET is supported by the Center, they may have already entered CBET and manual corrections will be required.

Incorrect sequence of reporting
Scenario #2
A. RHPP does not project CBETS, or
B. RHPP projects CBETS but does not confirm CBETs.
Impact #1: Required evaluations to students are not generated.
Impact #2: CBETS are not counted toward RHPP metrics and are not reportable to funders.
Suggested Resources For
Rural Health Professions Directors and Staff:

1. Contact information for centers: AHEC Contact Information v102023.pdf (arizona.edu)
2. Contact information for RHPPs: Rural Health Professions Program Contact Information.pdf (arizona.edu)
   - There is a single password for each RHPP
   - Access to Dashboard of entries and to the Scholars application module.
4. The AHEC report to the State of Arizona: https://azahec.uahs.arizona.edu/publications provides an overview of all programs supported by AzAHEC. Prior year reports also found at this link.
5. Attendance at AzAHEC Commission meetings and Monthly RHPP/Center meetings familiarize RHPP Directors with various topics. RHPP Directors receive invitations to both meetings, and RHPP Staff may benefit from a review of these minutes:
   - Prior RHPP/Center monthly meeting minutes: https://azahec.uahs.arizona.edu/about-azahec/azahec-program-office/center-and-rhpp-directors-meeting-minutes
6. Information on training materials, deadlines and other information previously made available to RHPP Directors and Staff are available at the following link. Program Office | Arizona Area Health Education Centers