A large saguaro cactus stands prominently in the foreground on the left, with its two arms reaching upwards. The background shows a vast desert landscape with numerous smaller saguaro cacti scattered across rolling hills under a bright blue sky with wispy white clouds. The lighting suggests a clear, sunny day.

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



THE UNIVERSITY OF ARIZONA
Arizona AHEC
Area Health Education Centers

AGENDA

AzAHEC Overview

SalesForce Overview

SalesForce Data Entry

SalesForce Dashboards

AzAHEC Overview

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 Overview

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

10/2023

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.)

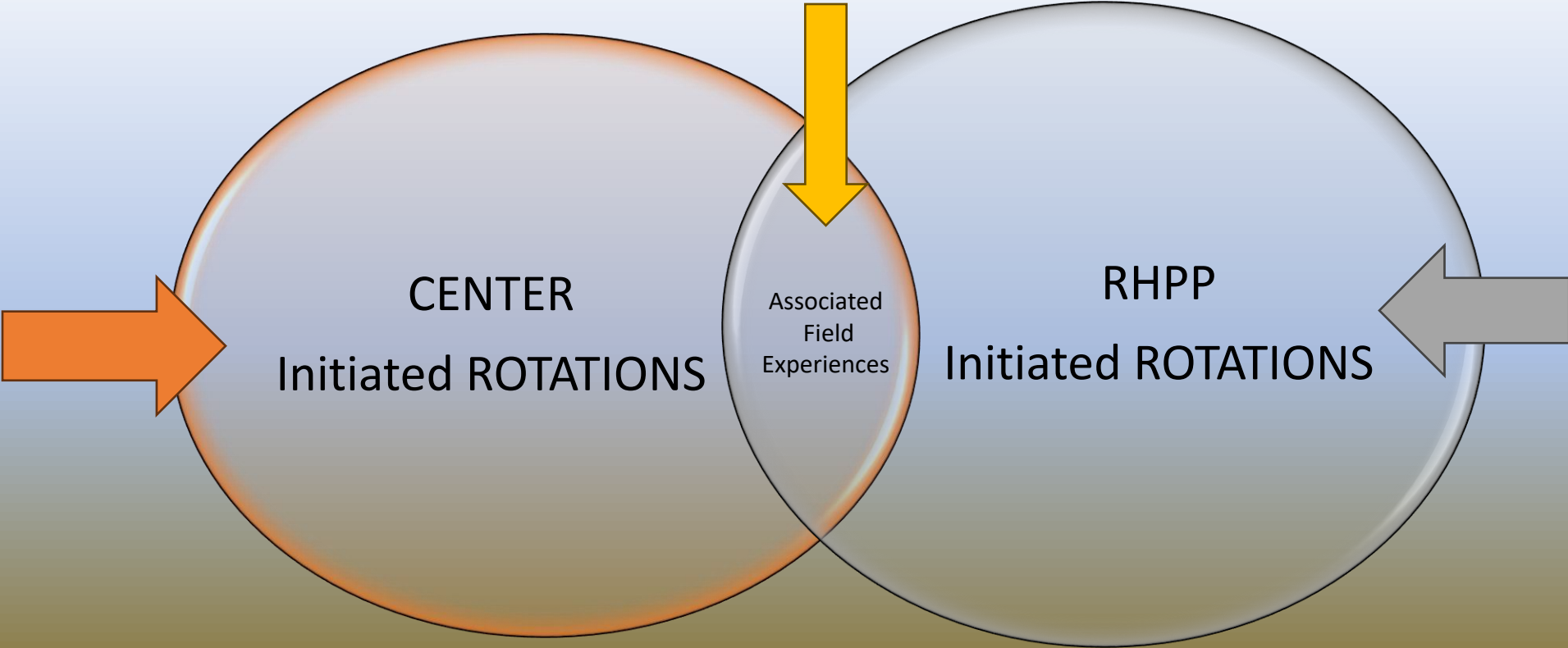
Beginning in fiscal year 2023/24:

- 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

SalesForce Reporting of RHPP and Center Rotations

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

Students from non-ABOR Schools or non-RHPP students within ABOR Schools who participate in underserved or rural rotations



RHPP Students who participate in an underserved or rural 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

Home Contacts Rotations Field Experience Support AHEC Scholar Application Reports More

Welcome to the RHPP Rotations Portal

AZ-AHEC Rotation Documentation System

[Custom Links](#)

[RHPP UA COM-T New Projected Rotation Form](#)

[Training Materials](#)

[Reporting Guide - Rotation Documentation System](#)

[Dashboard Overview](#)

RHPP Rotations Dashboard

Dashboard
RHPP Rotations Dashboards 2023-24

As of Nov 5, 2023 4:28 PM Viewing as RHPP UA COM-TUS

RHPP Program

All

RHPP - All Projected Field Experiences FY23/24

RHPP - All Confirmed Field Experiences FY23/24
Unvalidated Field Experiences

RHPP - All Confirmed Field Experiences FY23/24
Validated by Program Office

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

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*

[clear](#)

Student Not Found

*- required

Next

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

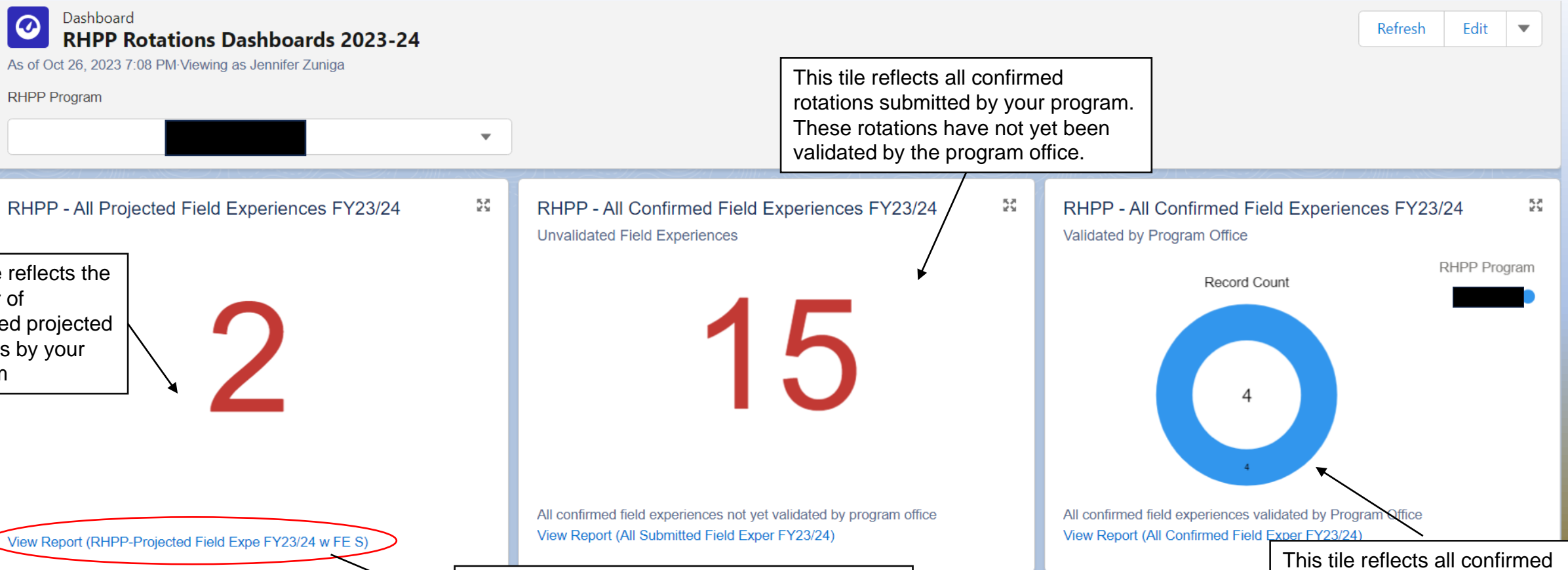
- Some of the form will auto-populate with:
 - 1) Existing information in Salesforce
 - 2) Information entered on the projected rotation form
- This information can be updated while completing the confirmed rotation form

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 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 ROTATIONS DASHBOARD



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

This tile reflects the number of submitted projected rotations by your program

View Report (RHPP-Projected Field Expe FY23/24 w FE S)

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.

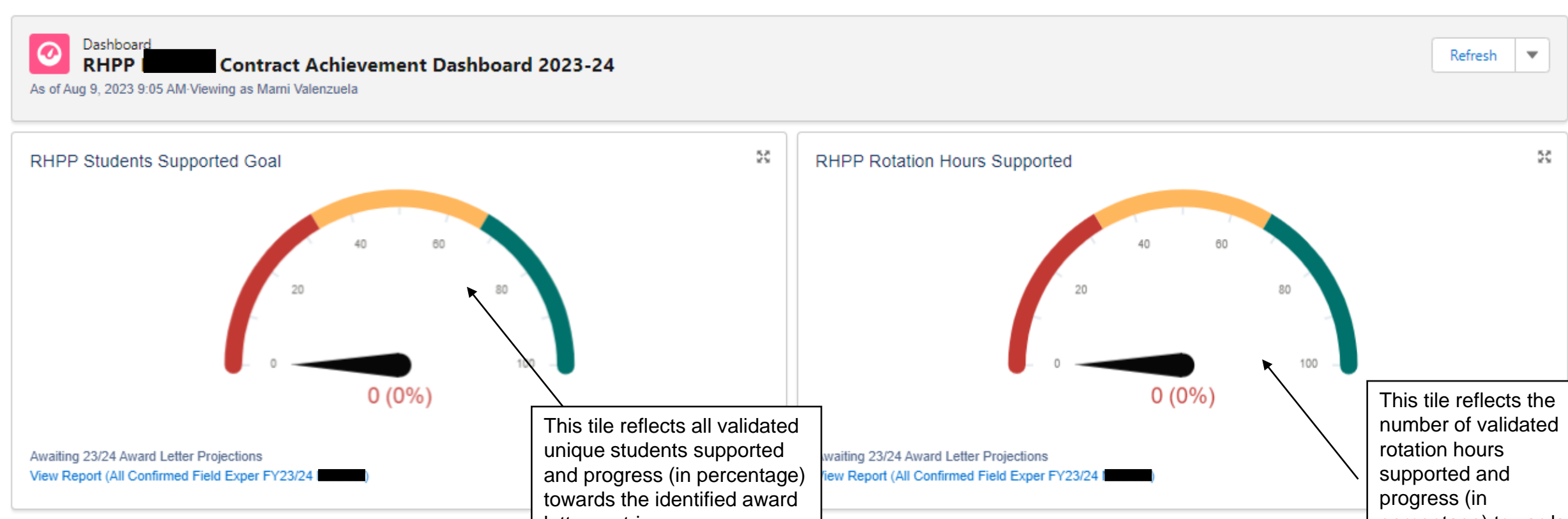
This tile reflects all confirmed rotations by your program and that have been validated by the program office for reporting purposes.

10/2023

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.

10/2023

Timing of RHPP Entries

RHPP Rotation Entry Timeframes

Projected Rotation Entry	Within 3 days of Start Date of Rotation
Confirmed Rotation Entry	Within 30 days of End Date of Rotation

Delays in projecting and confirming CBETs in Salesforce result in:

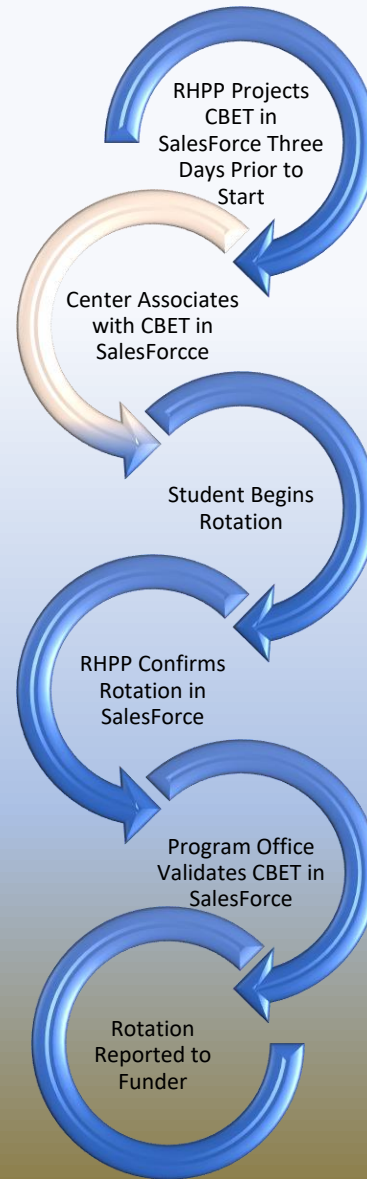
- Unreported/underreported metrics by RHPP in comparison with projections
 - Inconsistency between Salesforce data and submitted narrative reports
- Unreported/underreported rotation support by Centers
- Uncollected surveys required by funders

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 \(arizona.edu\)](#)
3. Sales Force Data entry portal: <https://arizona-ahec.force.com/RHPProtations/s/login/>
 - 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 AzaAHEC. Prior year reports also found at this link.
5. Attendance at AzaAHEC 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](#)

New!

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11/9/2023



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