Partners in Care
FOUNDATION
changing the shape of health care

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Health Self-Management Services Salesforce Project

PARTNERS receives multiple federal and private foundation grants for holding workshops that help qualified individuals with chronic conditions, develop skills to manage these conditions and live a healthier life.

PARTNERS is looking for a data base system to keep track of the grants, workshops, the volunteers who lead the workshops, and the participants. The system must also allow the collection of data such as attendees' demographics and workshop satisfaction surveys for reports due back to Grant owners and uploads to National Databases.

This document lists the records and functionalities that PARTNERS has identified as the minimum requirements to satisfy the objectives above, with the understanding that it will be updated during the discovery phase. Electronic copies of all required forms will be provided along this document.

Data Base

Grants

Grant Title (Name): Drop Down – *Title + Start Date is unique*

- ACL Falls
- ACL CDSME
- City IIID
- County IIID
- CDBG

Start Date: Short Date Type
End Date: Short Date Type
Task Manager: Browse to Contacts
EB programs Type: (multiple choice) *Browse to the Workshop Type in workshop DB*
Total Allocated per Diem: Currency – *Editable field*
Per Diem Balance: Currency - *Calculated field*
Per Diem Rate: Currency – *Editable field*
Grant Goals:

- # of participants/contacts: numeric field
- # of completers: numeric filed

Eligibility Criteria

- **Age**
  - ACL Falls AND ACL CDSME: 18+
  - City IIID, County IIID: 60+
  - CDBG: 62+
  - CDBG: IF Caregiver box is checked, 18+
  - CDBG: IF Grandparent box is checked, 55+
- **Zip Code**: Multiple choice. (Each grant has unique zip code list. Table will be provided.)

Forms: *details provided in the Forms section below*

Organization

Info:

- **Name**: Text Field
- **Organization Type**: Dropdown field – possible values list below
  - Local Partner
  - State Partner
  - National Partner
  - LAACHA Member
  - EBP Licensor
  - EBLC Member
  - Professional Services
  - Workshop Host Site
  - Sub-Contractor
  - Affiliate
  - Generic
- Workshop Host Site Type: dropdown value – *only if Workshop Host Site is selected*
  - Senior Housing Facility
  - Senior Center
  - Parks and Rec Site
  - Library
  - Community Center
  - Faith Based Org
  - Clinic/Hospital
- **Parent Organization**: Browse to organization. *Ability to identify an organization as parent*
- **Address**: Street, City, State, Zip, Country
- **Phone**:
- **Email**:

Contact: (*multiple entries)*

- **Name**: browse to Contacts
- **Primary**: Yes/No
-

Workshop History: (a section for the history of past workshops held at the location)

- Workshop Name:
- Workshop Date:

Note: text box

- **Wellness Club**: Yes/No field - if 3+ evidence-based programs, and the 3rd workshop is within 12 months from the start date of the 1st workshop, otherwise uncheck.

Workshops

Workshop Lead:

Name: Text field

Workshop Type- drop down field, Possible Types

- Chronic Disease Self-Management Program
- Tomando Control de Su Salud
- Diabetes Self-Management Program
- Programa de Manejo Personal de la Diabetes
- Chronic Pain Self-Management Program
- Programa de Manejo Personal del Dolor Cronico
- A Matter of Balance
- Arthritis Foundation Exercise Program
- Arthritis Foundation Walk with Ease
- UCLA Memory Program
- Tai Chi for Arthritis
- Enhance Fitness

Associated Grant: Picklist, Brows to grant type defined above

Associated Organization: Browse to organization name defined above

Location: Prepopulated based on the associated Organization.

Contact: Prepopulate the Primary Contact from associated Organization.

Outreach: check boxes

- Send info flyer/interest sheet
- Provide introductory session

Potential Start Date: Short date
Potential End Date: Short date
Potential Recurrence Days: Pick list Monday through Friday.
Potential Time: Text field
Language: dropdown field: *values as follows*

- English
- Spanish
- Mandarin
- Cantonese
- Korean
- Russian

Ready for Coordination: check box *Once checked, the workshop lead turns (is now considered) a workshop campaign)*

Workshop Campaign

Name: Text field
Workshop Type- drop down field, Possible Types

- Chronic Disease Self-Management Program
- Tomando Control de Su Salud
- Diabetes Self-Management Program
- Programa de Manejo Personal de la Diabetes
- Chronic Pain Self-Management Program
- Programa de Manejo Personal del Dolor Cronico
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- Arthritis Foundation Exercise Program
- Arthritis Foundation Walk with Ease
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Associated Grant: Picklist, Brows to grant type defined above
Invoicing Required: Yes/No field
Associated Organization: Browse to organization name defined above
Sponsored Workshop: Yes/No field .

If YES above,
Sponsored*:* pick list*:*

- Blue Shield
- Alta-Med
- Promise Healthcare
- Dept of Health Services
- CA Physicians Group

Location: Prepopulated based on the associated Organization.
Contact: Prepopulate the Primary Contact from associated Organization.
Start Date: Short date
End Date: Short date
Recurrence Days: check mark the days of the week.

Sessions' Date: the system will auto-populate the dates based the current days select and beginning date. *If there is a holiday observed, then the dates can be changed manually by Partners staff*

Language: dropdown field: *values as follows*

- English
- Spanish
- Mandarin
- Cantonese
- Korean
- Russian

Workshop Status: Drop down field. possible values are

- Planned
- Scheduling Leaders
- In progress
- Completed
- Cancelled

Data Entry Status: drop down field, possible values are

- Pending data receipt
- Pending data entry
- Data entry complete

Leader Name: Browse to the name field in the contacts table. *Multiple entries, which each selection the contact information (phone, email and address will populate)*

Per Diem Required? Yes/No field (*each leader must have this field*)

Per Diem Total: Currency *once entered and saved, this value will be deducted from the Grant Per Diem Balance.*

Guest Healthcare Professional – browse to contacts table

Attendance Sheet – list of attendees and the sessions they have attended. The unique identifier will be used, generated based on the decoding provided

Task List (to do list) –

> *When a lead workshop becomes an active one, a list of predefined tasks will get generated (site check-ins, kit pick-up, recruitment, flyers, gift cards). The grant task manager associated with the workshop will assign each task to a staff member (browse to contact list) Assigned contact will see the task populated on their dashboard. Tasks will be marked completed with a field for notes.*

Contacts

Type: (*values listed below)*

- **Participant** (*workshop participants)*
- **Staff** (*PICF employees)*
- **External EBP** (Evident Based Program) **Leader**
- **Volunteer** (integrate Volunteers for Salesforce app)
- **Site Contact**
- **Guest Healthcare Professional**

Role (*values listed below*)

- **Matter of Balance Master Trainer** – (*does fidelity checks and training of the leaders)*
- **CDSMP** (Chronic Disease Self-Management Program) **Master Trainer** – do fidelity checks and training of the leaders
- **Diabetes Self-Management Program Master Trainer** – (*do fidelity checks and training of the leaders*)
- **Chronic Pain Self-Management Program Master Trainer** – (*do fidelity checks and training of the leaders)*
- **Leader**
- **Fidelity Checker**

- **First Name:**
- **Last Name:**
- **Address: Street, City, Zip Code, State, Country**
- **Phone:**
- **Email:**
- **Language:**
  - English
  - Spanish
  - Mandarin
  - Cantonese
  - Korean
  - Russian

Contact Attributes Specific for each Type

Volunteer

Application (a form completed with information such as name, availabilities, etc.) *- suggested options below*

1. *Current applications in Survey Gizmo a way to upload the SG form into Salesforce*
2. *Create a SF form, allow none account holders complete the form. Partners to upload the form into the contact record.*

Status: dropdown field (*possible values below)*

- Application received
- Phone Screening
- Background Check
- Orientation
- Training
- Active
- Inactive
- Disqualified

Note: text box for Status

Time Cards

Update timecards, either using SF guest account

Current Workshop Assigned: *Display only from the workshop*

Workshop history *(a section to display the history of workshops each volunteer has led)*

Availability Schedule

Mileage: numeric field. *The mileage willing to drive for a workshop*

Leader

Workshop history – *(a section to display the history of workshops each volunteer has led: workshop name and start date)*

Certifications: Dropdown field: *Values are*

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Fidelity Info - *Keep history*

Last fidelity check date:

Fidelity Form: attachment

Checked by: Browse to contacts *filtered for Master Trainers only Fidelity Checker*

Master Trainer

- **Workshop type trained in:**
- **Date Trained:** Short Date *this is the last date they were trained as a mater trainer*
- *History of trainings per workshop type*

Participant

Unique Identifier: first 2 letters of first name, first 2 letters of last name, last two number of the birth year.

Caregiver: Yes/No field

Grandparent: Yes/No field

Workshop Name:

Eligible: Yes/No field – *the participants zip code and age will be checked against the eligibility requirements set in the grant that the workshop is for.*

Attendance forms

Related intake forms

Functionalities

Dashboard

Staff

Fidelity Check –

The CDSME fidelity checkers and matter of balance master trainers should have the fidelity check task on their dashboard.

- CDSME fidelity Checker
  - Identify the leaders who have been assigned to lead a workshop but have no history in that specific program.
  - Identify the leaders last fidelity check date + 24 months.
- Matter of Balance Fidelity Checker
  - Identify the leaders who have been assigned to lead a workshop but have no history in that specific program.

Match Workshop and Leader

Once a new workshop has been created, the system must identify the pool of Leaders who are best match for the workshop and email the Leader with workshop detail. The open workshop opportunities will also appear on the leader's dashboard. (volunteer job)

Match qualifier:

- They are certified to lead the type of workshop. *Required*
- Language. *Required*
- Potential leader has matching date and time availability. *Optional*
- Workshop is located within the leader's acceptable drive range. *Optional*

When a leader decides to lead a workshop.

- Leaders should be able to click on a button to claim the workshop.
- An email will be generated to workshop coordinator. The workshop will be assigned only if the workshop coordinator (Melissa) confirm the claim.
- The workshop will be added to the leaders assigned workshop list in the dashboard and a confirmation email will also be sent to them.

Guest HealthCare Professional (GHP) Assignment

GHP needed by the 7^{th} week of Matter of Balance workshop.

- A task on the dashboard will be created as part of predefined task lists. *All profiles will see this*

Workshop Data for Role = Date Coordinator

Dashboard entry will display a list of workshops with outstanding data (status = Pending Data Receipt)
List of workshops with end date = today's date + 7

Leads:

Volunteers, GHPs and Workshops start as a lead first.
Volunteer is a lead until the following applies: lead volunteers must pass background check and received volunteer orientation and then they will turn into a confirmed volunteer
GHP is a lead until the following applies: they are lead until they receive a GHP orientation. Then they become actual GHP contacts
Workshop: is a lead until a Leader is assigned, then it turns into a confirmed workshop

Forms

Workshop Type	Form Required
Intakes	• CDBG Self Certification form (CDBG Intake form). • Client Intake – Disease Self-Management Services (City/County)
A Matter of Balance	• Matter of Balance Attendance Log. • A Matter of Balance Participant Information Form • A Matter of Balance Class Evaluation • A Matter of Balance Participant Post Program Survey.
Chronic Disease Self-Management Program	• Healthier Living Workshop Attendance Log • Healthier Living Participant Information Survey • Healthier Living Session 6.

Tomando Control de Su Salud	• Tomando Control Workshop Attendance Log • Tomando Control Participant Information Survey • Tomando Control Session 6.
Diabetes Self-Management Program	• Diabetes Workshop Attendance Log • Healthier Living Participant Information Survey • Healthier Living Session 6.
Manejo Personal de las Diabetes	• Manejo Personal de las Diabetes Workshop Attendance Log • Tomando Control Participant Information Survey • Tomando Control Session 6.
Chronic Pain Self-Management Program	• Chronic Pain Workshop Attendance Log • Healthier Living Participant Information Survey Healthier Living Session 6.
Manejo Personal del Dolor Cronico	• Manejo Personal del Dolor Cronico Workshop Attendance Log • Tomando Control Participant Information Survey • Tomando Control Session 6.
Arthritis Foundation Exercise Program	• Attendance Log
Arthritis Foundation Walk with Ease	• Arthritis Foundation Walk with Ease Participant Attendance Form. • Arthritis Foundation Walk with Ease Session 18 Survey.
Tai Chi for Arthritis	• Tai Chi for Arthritis Participant Information Form • Tai Chi for Arthritis Participant Post Program Survey. • Tai Chi for Arthritis Attendance Log.
UCLA Memory Training	• UCLA Memory Training Attendance Log. • Memory Training Program Participant Questionnaire. • UCLA Evaluation Form.

Reports

Need ability to run reports and export data to .csv file for upload into external National database (data migration template to be provided)

Departmental Dashboard Report (with customizable start and end reporting dates, and colored by project) *Departmental mean cumulative across all funding sources*

- Department-wide Participants: Actual # of participant/Target # %

- Department-wide Completers: Actual # of completers/Target # %
- Workshops Planned: Total # of Workshops with start date > today
- Workshops In-Progress: Total # of Workshops status = “active”
- Workshops Completed: Total # of Workshops with end date < today, regardless of their status
    - Pending Data Receipt
    - Pending Data Entry
    - Data Entry Completed
- Workshop Lead Conversion Summary: Workshop Leads Converted/Workshop Leads Entered %
- Workshop lead Conversion Timeline: # of days from workshop lead entry date to lead conversion date

Grant-Specific Report (with customizable start and end reporting dates)

Grant-wide Participants:

- Grant-wide Completers:
- County Attendance Report: Total number of contacts per session, per date County IIID
- Grant-wide Unduplicated Clients: *Number of clients who have attended only one workshop during the reporting period specified when running the report*
- Grant-wide Duplicated Clients: *Number of clients who have attended more than one workshop during the reporting period specified when running the report*
- Workshops Planned (by workshop type): *list of workshops by type, by grant, workshop status = planned, for the specified report period*
- Workshops In-Progress (by workshop type): *list of workshops by type, by grant, workshop status = in progress, for the specified report period*
- Workshops Completed (by workshop type): *list of workshops by type, by grant, workshop status = completed, for the specified report period*
- Workshop Lead Status Report *# of potential workshop leads Ready for Coordination = False (not checked) by workshop type, by program*
- Outstanding Tasks - *List of outstanding tasks for each staff, by workshop, by grant*

Volunteer Report

- Total number of volunteers. *list of volunteers by certification and geographic location (address)*
- Potential volunteers Leads. *Name, address, status, Notes (volunteers not certified)*
- Total number of days from potential volunteer lead input to completed onboarding (status = active) the date volunteer marked active – (minus) lead entry date