

MCE QUICK REFERENCE GUIDE TO SALESFORCE REPORTING

LOGGING INTO SALESFORCE

Go to <https://ldh.force.com/Reporting>. ⓘ *The Salesforce experience is significantly limited in Internet Explorer. For full functionality, use an alternate browser, such as Edge, Chrome, Firefox, or Safari.*

ROUTINE REPORTS

NEW SUBMISSIONS

1. On the homepage, click **Submit New** under “Submit Routine Reports.”
2. Select the report details from the drop down menus.
3. Click **Upload Files** to attach documents.
4. Click **Submit Report**. The LDH report approval workflow will begin.

VIEWING OR TRACKING SUBMISSIONS

1. On the homepage, click **View/Edit** under “Submit Routine Reports.”
2. Find the submission in the list and click to open.

RESUBMISSIONS AND REPLACEMENTS

A resubmission is required when LDH rejects a report. You may also replace a report if you discover an error, whether it is pending approval or already approved; however, all actions will be tracked by LDH for compliance monitoring.

1. Navigate to the submission record by following the “Viewing or Tracking Submissions” steps.
2. Click **Resubmit Report** in the top right corner.
3. Enter the “Resubmission Reason.”
4. Click **Upload Files** to attach the new version of the file(s).
5. Click **Submit Report**. The LDH report approval workflow will restart.

AD HOC REPORTS AND DATA TRANSFERS

NEW SUBMISSIONS

1. On the homepage, click **Submit New** under “Submit Ad Hoc Report/Data Transfer.”
2. Select the appropriate “Category” (department/content area) and “Name” (type of report), and provide additional key information under “Notes” (e.g., “2021 Q1 data”).
ⓘ *If you do not see an appropriate category or name, select “Miscellaneous.” In the “Notes” box, enter key information, including the name of the intended recipient.*
3. Click **Upload Files** to attach documents.
4. Click **Submit Report**. You will see a confirmation message, and the LDH report owner will be notified.

RESUBMISSIONS

1. On the homepage, click **View/Edit** under “Submit Ad Hoc Report/Data Transfer.”
2. Find the submission in the list and click to open.
3. Click **Resubmit Report** in the top right corner.
4. Do not change the “Category” or “Name.” Do not delete any information in the “Notes” box. You may type additional notes regarding the resubmission reason.
5. Click **Upload Files** to attach the new version of the file(s).
6. Click **Submit Report**. You will see a confirmation message, and the LDH report owner will be notified.

COMMUNICATING WITH LDH REVIEWERS

LDH encourages the use of Chatter, rather than email, in order to organize and retain correspondence about a specific report or data transfer within the submission record.

1. Navigate to the submission record.
2. Under “Post” at the right side of the submission page, place your cursor in the “Share an update” field and type additional comments or respond to LDH questions.
3. Tag the LDH user (@[Name]) for Salesforce to automatically notify the user of the message.