MCE User Guide

Salesforce Managed Care Reporting

1 Introduction

1.1 Background

Salesforce is the system used to submit, review, and monitor compliance of managed care reports. Users of the system are the managed care entities (MCEs) and LDH report owners, reviewers, and managers.

1.2 Logging into Salesforce

> ⓘ The Salesforce experience is significantly limited in Internet Explorer. For full functionality, use an alternate browser, such as Edge, Chrome, Firefox, or Safari.

- Go to https://ldh.force.com/Reporting.

- Enter your LDH user account credentials if prompted.

1.3 New User Accounts

- To request a new user account, email the LDH Salesforce Administrator.

- You will receive an email, once your account is created, to set up your password.

> ⓘ If the link brings you to a regular login screen rather than a screen to set up your new password, this may be due to caching issues with your browser. If this happens, turn on the private or "incognito" browsing mode in the settings of your browser. Copy the link from the email, and paste it into the private browser.

1.4 Sandbox

The MCE Sandbox is the testing environment in which users can test or practice the various features of the Salesforce reporting application. If you wish to access the sandbox, email the LDH Salesforce Administrator to set up a sandbox account. You will receive an email with a user name and a link for initial login and password set-up.

1.5 Salesforce Administrator

Email the LDH Salesforce Administrator with technical issues or questions at SalesforceAdministrator@la.gov.

2   Navigating Salesforce

The MCE portal is where you can access report templates, submit reports and data transfers, and track submissions.
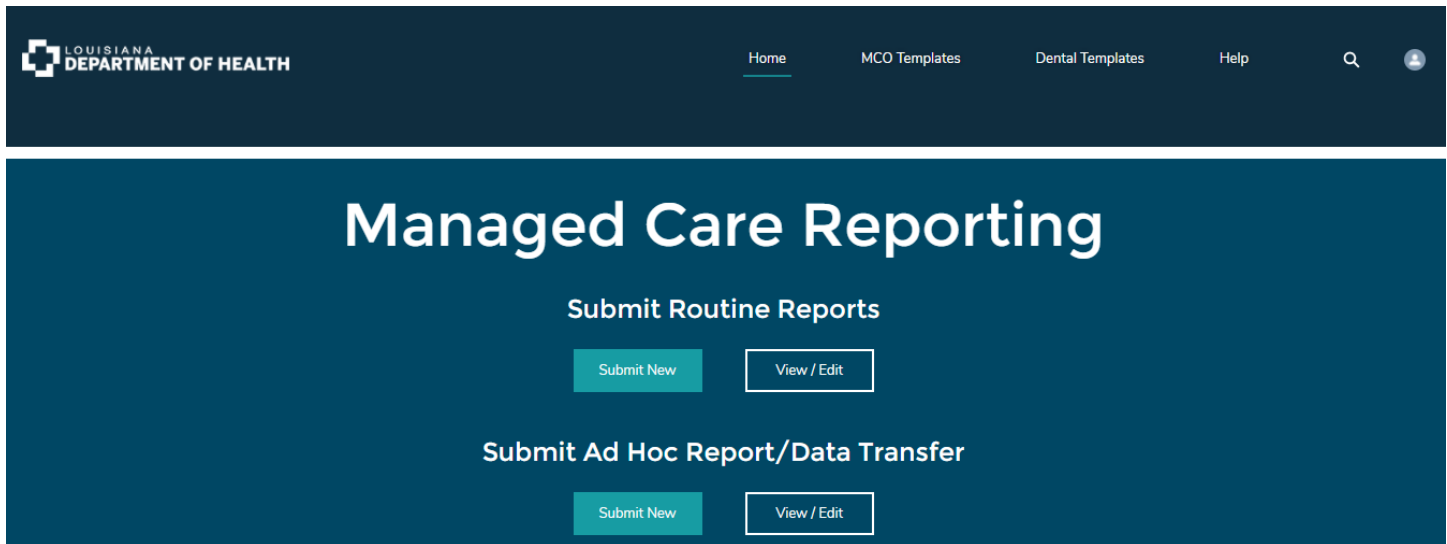
At the top of the homepage, you will find these helpful links:

- **MCO Templates** – Link to the LDH webpage with all MCO report templates.

- **Dental Templates** - Link to the LDH webpage with all Dental report templates.

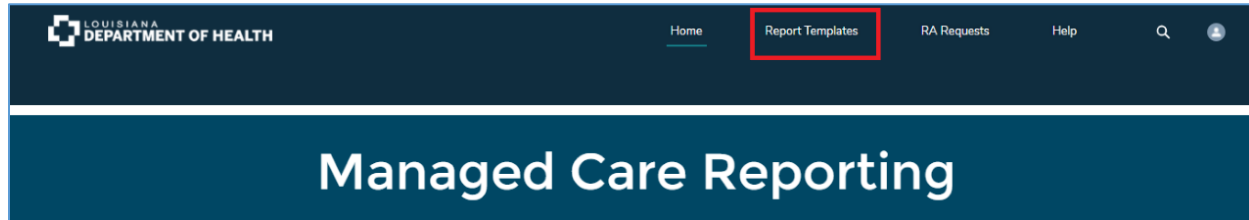- **Help** – Link to Salesforce Resources webpage.

At the middle of the homepage, you will find links to submit or view/edit routine reports, ad hoc reports, and data transfers.

3 Routine Reports

3.1 Routine Report Templates

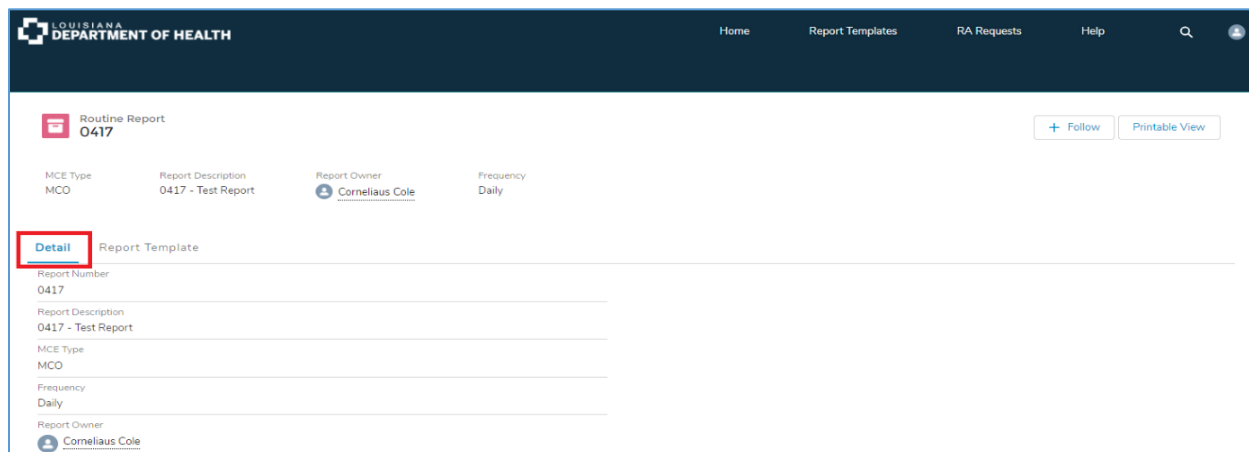### 3.1.1 Viewing Routine Report Templates

- On the homepage, click on **Report Templates**.

- A list of reports applicable to your MCE type will display. Locate the appropriate report and click on the report number to open the routine report record.
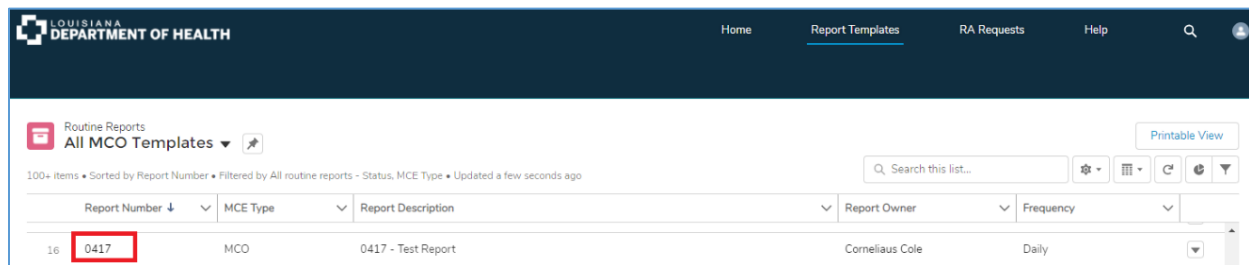
- Click **Details** to view general information about the routine report.

- Click **Report Template** to view and download the template.

- Refer to the Report Template Status to identify the appropriate template:

    o "Active" – Currently in use.

    o "Approved" – Revised template which will become active on the initial due date. Once the approved template becomes active, the previously active template will no longer be visible.

- The Summary of Revisions provides a brief summary of the changes made to that version of the report template.

3.1.2 New or Revised Routine Reports

If you are on the MCE distribution list, you will receive an email notification of new or revised routine report templates applicable to your MCE type.

The email will include all the report details, including an Initial Due Date and Summary of Revisions (for revised templates). Click the link in the email to access the routine report and download the template. You may also follow the steps above to navigate to the routine report within Salesforce.
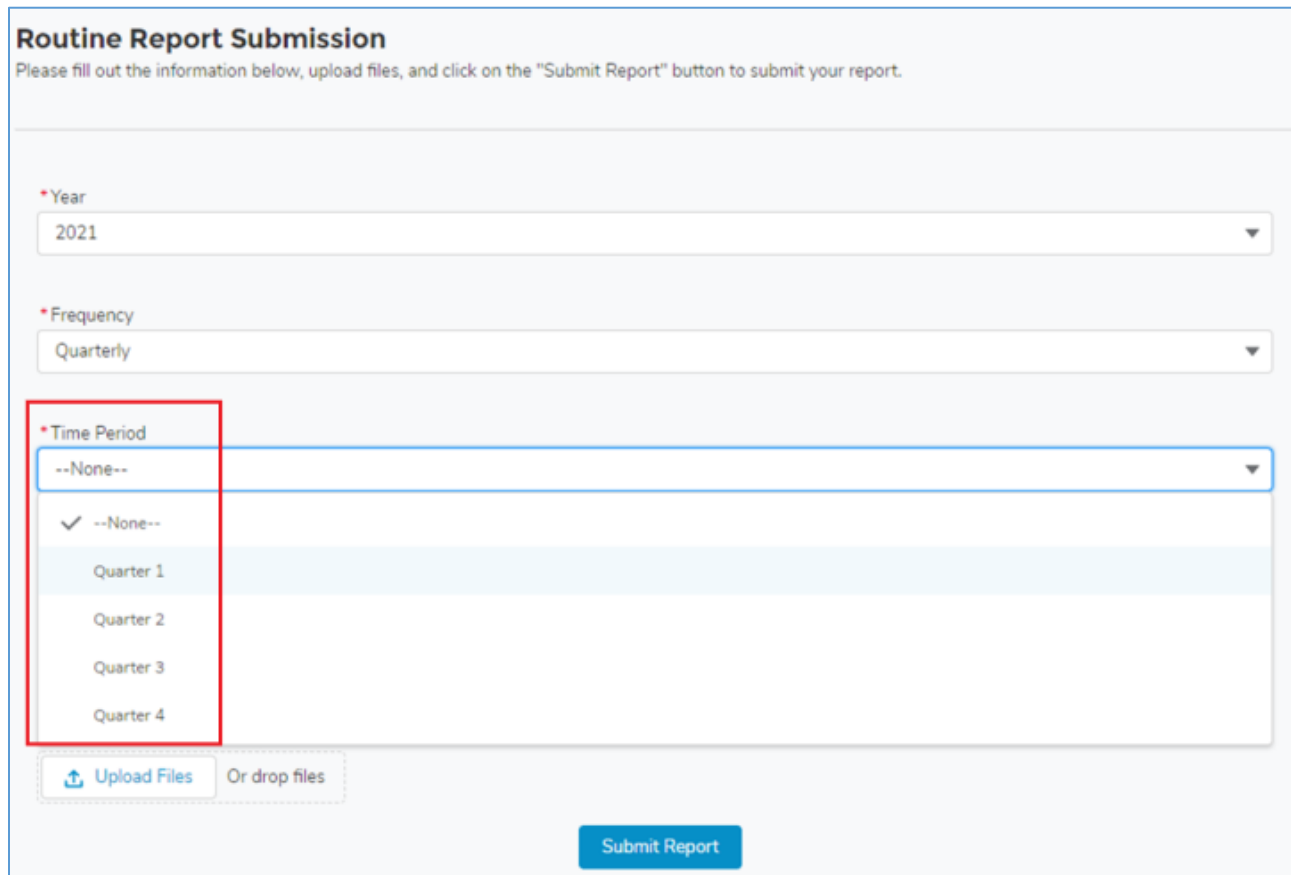
3.2   Routine Report Submissions

3.2.1   Submitting a New Routine Report

- On the homepage, click **Submit New** under "Submit Routine Reports."
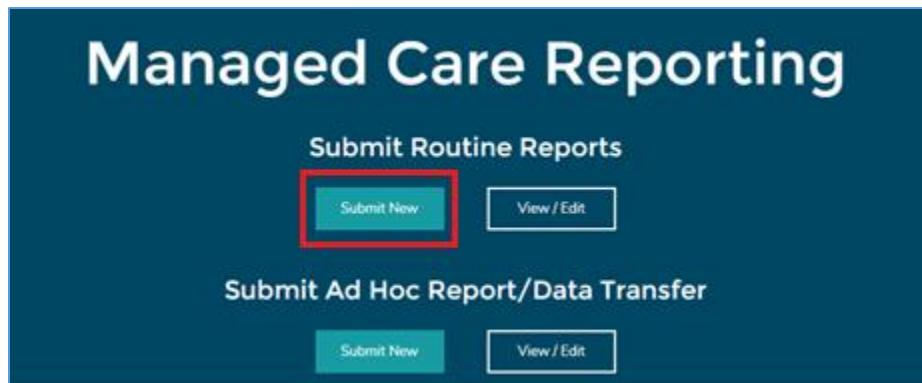
- Select the appropriate year and frequency. Based on the frequency, the relevant time periods will populate.

- The available reports for the selected timeframe will automatically populate the Report Type dropdown menu. Select the report you wish to submit.

- Once you have selected the report information, click **Upload Files** and follow the prompts to upload documents (2 GB limit).
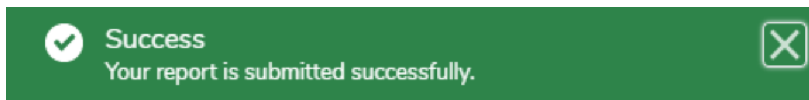
- Once the file(s) are uploaded successfully, you will see the attached files listed. If you upload a file in error, go back to the homepage to restart the process. When you are ready to submit your report, click **Submit Report**.


- A brief message will pop up at the top of the page, which confirms your report was submitted successfully.


After a report is submitted, a report submission name will be assigned, usually in the following format: "[Report #] [MCE Name] [Reporting Period]." The LDH report approval workflow will begin, and the LDH report owner will receive an email notification that there is a submission awaiting their review.

3.2.2   Viewing or Tracking a Routine Report Submission

- You can view or track report submissions by clicking **View/Edit** on the homepage.
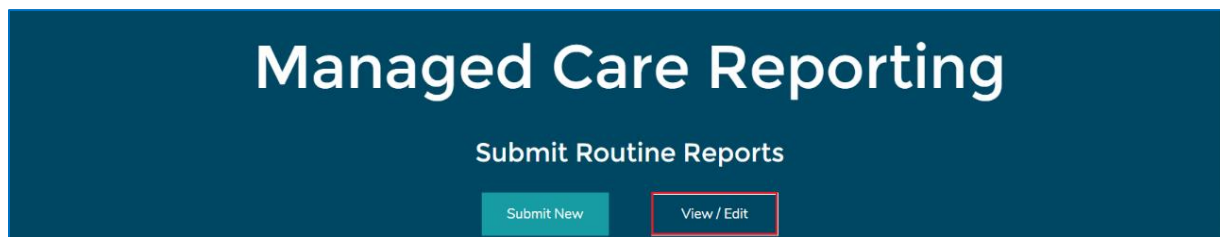
- The default list view can be changed by selecting the list view you prefer from the drop-down and clicking on the pin icon.
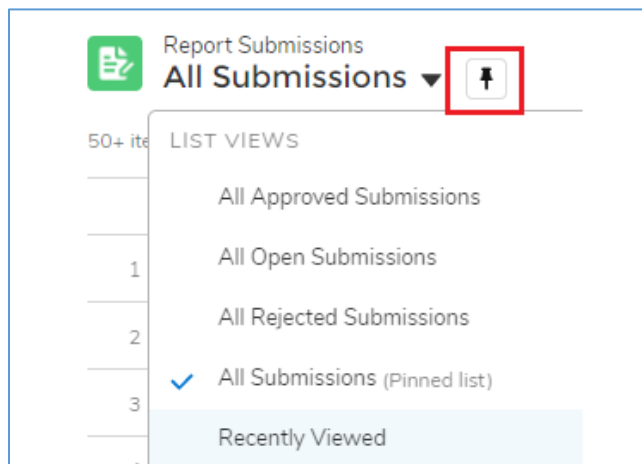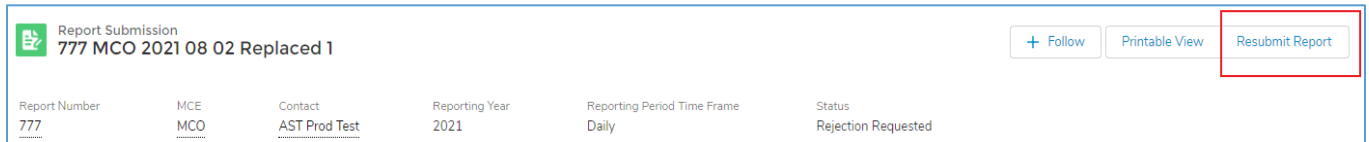

- LDH will communicate with you via email and/or chatter if there are any questions on the submitted report.

- You will receive an email notification with comments, if any, when a report is approved or rejected.

3.2.3 Resubmitting a Rejected Routine Report

You will receive an email when an LDH reviewer rejects a report. You will need to resubmit a corrected version.

- Click on the link in the email to open the report submission. You may also navigate to the report submission by clicking **View/Edit** on the homepage and opening the rejected report.

- In the report submission, click **Resubmit Report**.

- This will take you through the resubmission process where the report details will be prepopulated. *Do not edit these fields unless they were incorrect on the initial submission*.
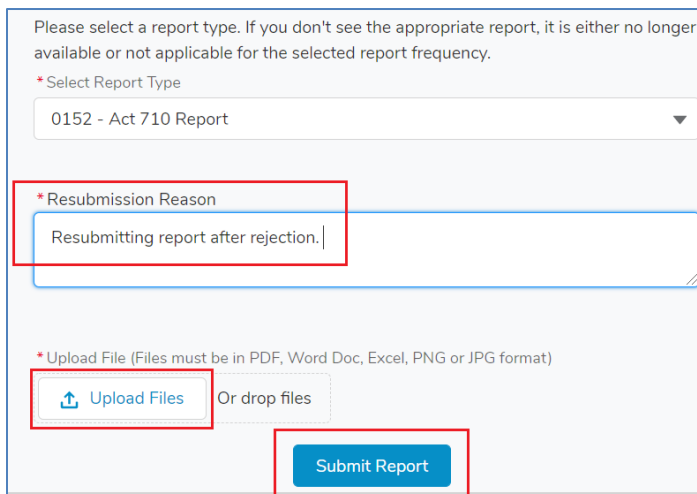

- Update the "Resubmission Reason" and upload the new version of the file(s). Click **Submit Report** to submit to LDH for further review.
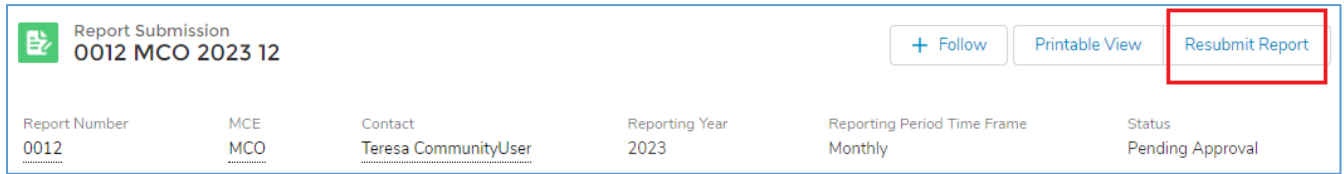

Resubmission triggers the LDH approval workflow, and the status of the report will change to "Pending Approval." The report submission will automatically be renamed to read "…Revised {version number}."

3.2.4 Replacing a Report Under LDH Review

If you realize your report submission contains an error, you can replace a report that is already under LDH review.

- Navigate to the report submission by clicking **View/Edit** on the homepage and opening the report.

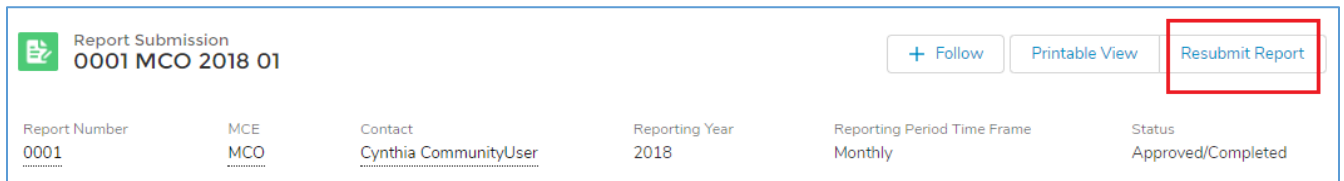- In the report submission, click **Resubmit Report**.

- This will take you through the resubmission process where the report details will be prepopulated. *Do not edit these fields unless they were incorrect on the initial submission*.

- Update the "Resubmission Reason" and upload the new version of the file. Click **Submit Report** to submit to LDH for further review.

Resubmission triggers the LDH approval workflow and the status of the report will change to "Pending Approval". The report submission will automatically be renamed to read "…Replaced {version number}."

3.2.5   Replacing an Approved Report with a New Version
If you realize your approved report submission contains an error, you can replace the report.

- Navigate to the report submission by clicking **View/Edit** on the homepage and opening the report.

- In the report submission, click **Resubmit Report**.

- This will take you through the resubmission process where the report details will be prepopulated. *Do not edit these fields unless they were incorrect on the initial submission*.

- Update the "Resubmission Reason" and upload the new version of the file. Click **Submit Report** to submit to LDH for further review.

Resubmitting a new version of an approved report will create a new report record with a status of "Pending Approval," and the LDH approval workflow will start. The status of the old version of the report will change to "Cancel with Replacement."
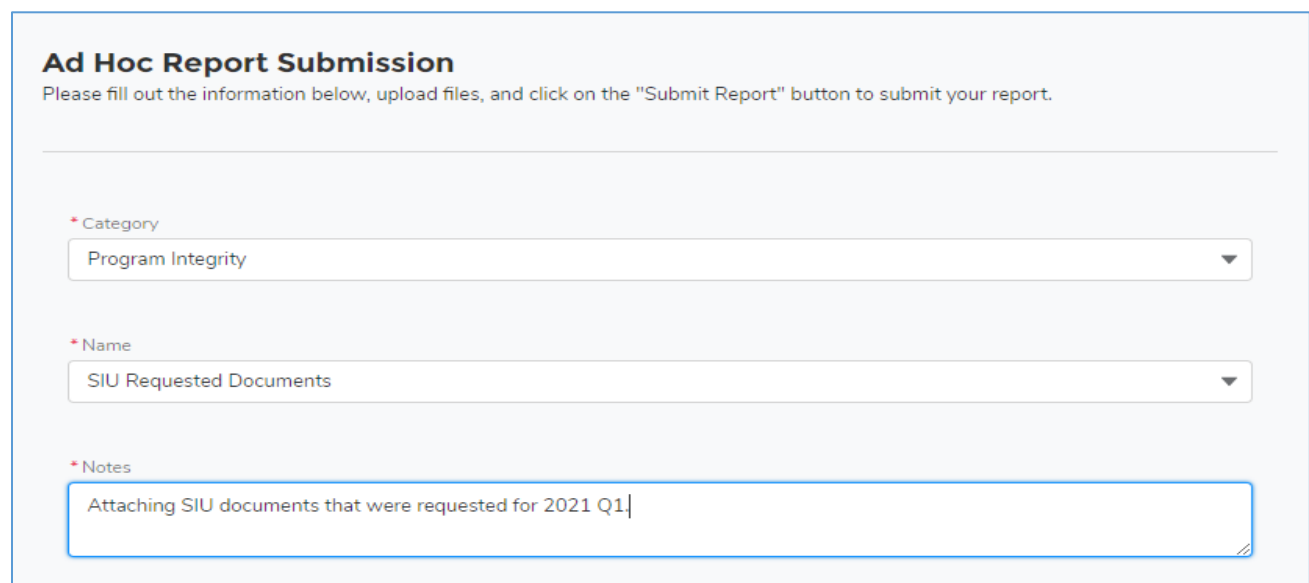
4   Ad Hoc Reports and Data Transfers

4.1   New Ad Hoc Report or Data Transfer Submissions

- On the homepage, click **Submit New** under "Submit Ad Hoc Report/Data Transfer."
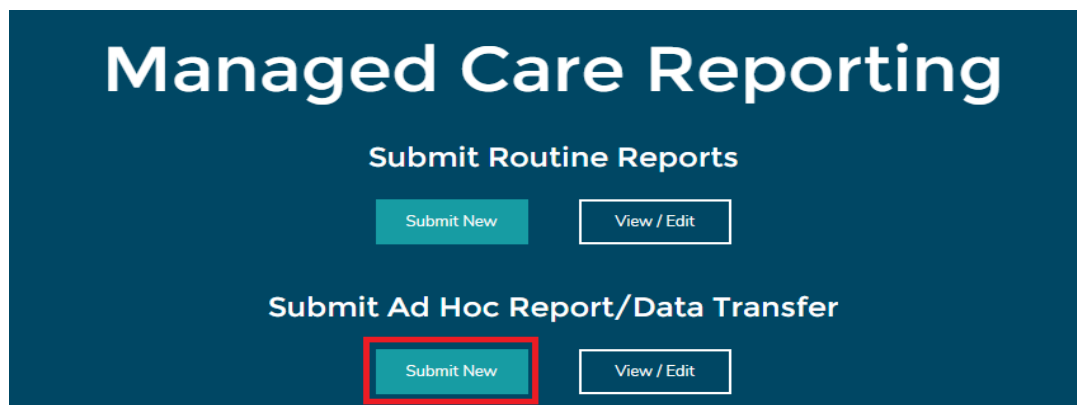
- Select the appropriate "Category" (subject matter area) and "Name" (type of report), and provide additional key information under "Notes" (e.g., "2021 Q1 data").

> ⓘ If you do not see an appropriate category or name for your submission, select **Miscellaneous** for both. Be sure to include key information, including the name of the intended recipient, in the "Notes" box, so that LDH can route the submission to the appropriate contact.

- Once you have completed the submission information, click **Upload Files** and follow the prompts to upload documents (2 GB limit).

Ad Hoc Report Submission
Please fill out the information below, upload files, and click on the "Submit Report" button to submit your report.

* Category
Program Integrity

* Name
SIU Requested Documents

* Notes
Attaching SIU documents that were requested for 2021 Q1.

* Upload File (Files must be in PDF, Word Doc, Excel, PNG or JPG format)
⬆ Upload Files   Or drop files

- Once the file(s) are uploaded successfully, you will see the attached files listed. If you uploaded a file in error, go back to the homepage to restart the process. When you are ready to complete your submission, click **Submit Report**.

Upload File (Files must be in PDF, Word Doc, Excel, PNG or JPG format)
⬆ Upload Files   Or drop files

Successfully uploaded: test.docx

Submit Report

- A brief message will pop up at the top of the page, which confirms your submission was submitted successfully.

✓ Success
Your Ad Hoc Report is submitted successfully.   ✕
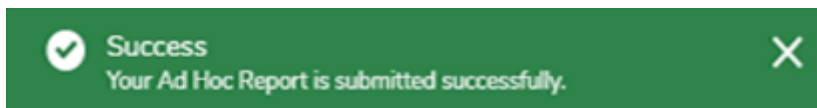
- The LDH owner will receive an email notification that there is an ad hoc or data transfer submission awaiting their review.

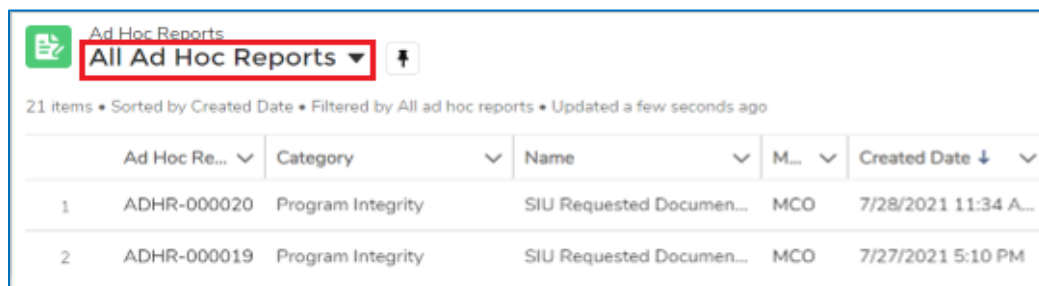## 4.2   Viewing Ad Hoc Report or Data Transfer Submissions

- On the homepage, click **View/Edit** under "Submit Ad Hoc Report/Data Transfer" to view submissions.

Managed Care Reporting

Submit Routine Reports

Submit New   View / Edit

Submit Ad Hoc Report/Data Transfer

Submit New   View / Edit
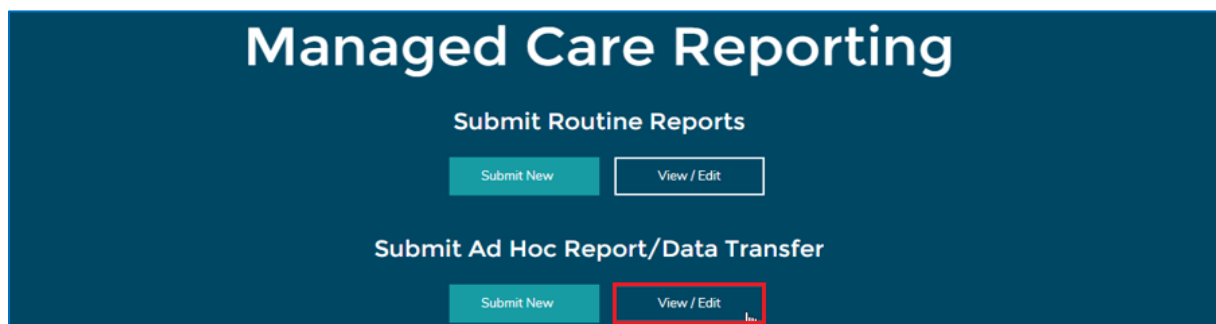
- The default list view is set to "Recently Viewed." This can be changed by selecting the list view you prefer from the drop-down and clicking on the pin icon.
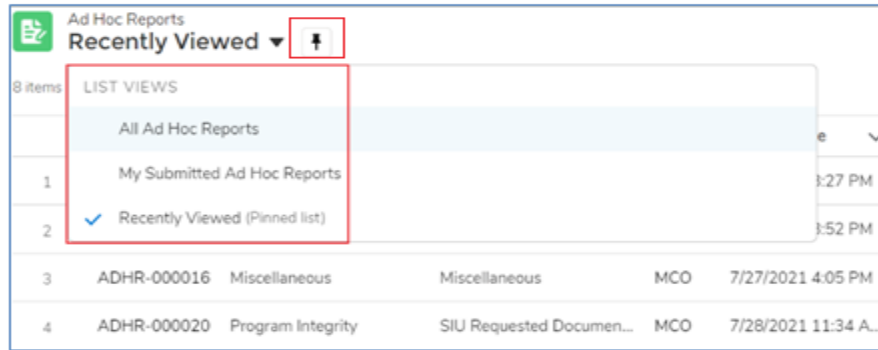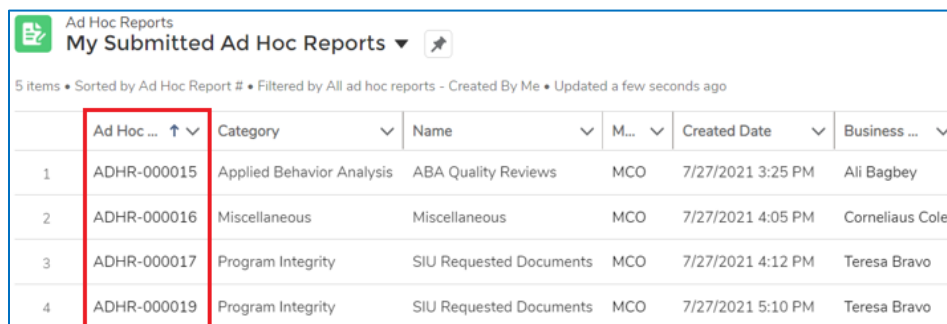

- On the list view drop down menu, select **All Ad Hoc Reports** to view all ad hoc reports or data transfers submitted by your MCE.

- On the list view drop down menu, select **My Submitted Ad Hoc Reports** to view all ad hoc reports or data transfers submitted by you.
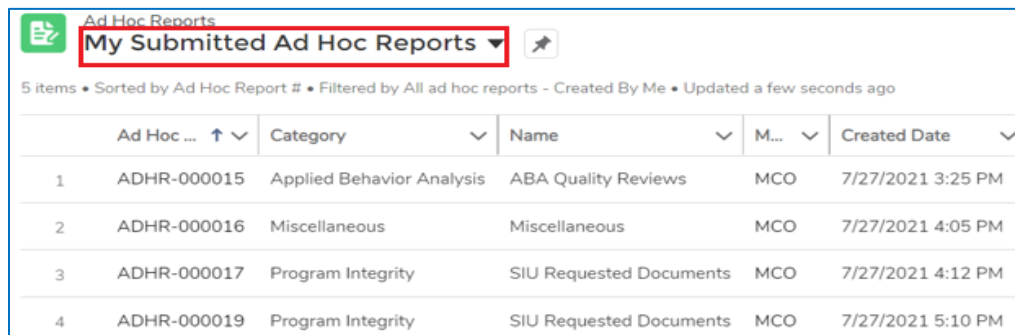
- Click on the record number to open and view the details of that submission.

- Click **Details** to view information pertaining to the report submission.

- Click **Files** to view attachments.

4.3   Resubmitting an Ad Hoc Report or Data Transfer

- On the homepage, click **View/Edit** under "Submit Ad Hoc Report/Data Transfer" to view submissions.

- Click on the record number of the ad hoc report submission you want to resubmit.

- Click the **Resubmit Report** button in the top right corner.

- 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.

- Upload additional files, and click **Submit Report**.

- Once resubmitted files are successfully uploaded, you will see a confirmation screen.
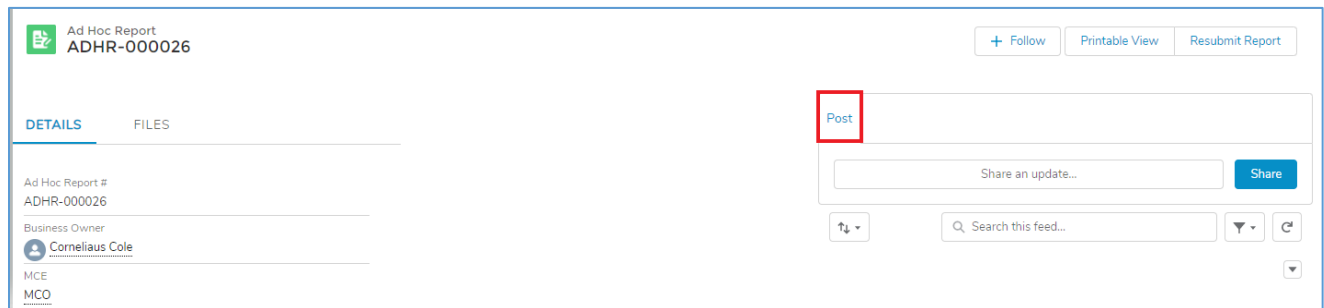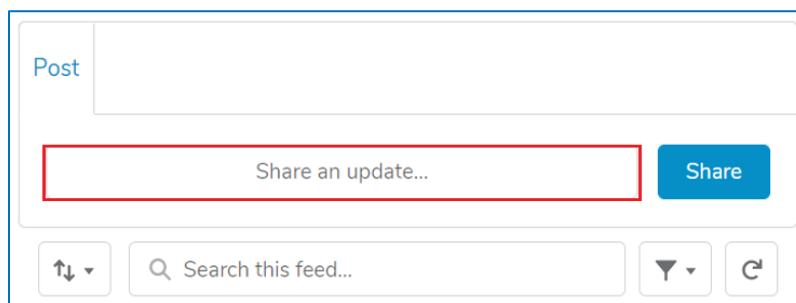
5 Communicating in Salesforce

Chatter is Salesforce's social network. LDH encourages the use of chatter, rather than email, in order to organize and retain correspondence about a specific report within the submission record.
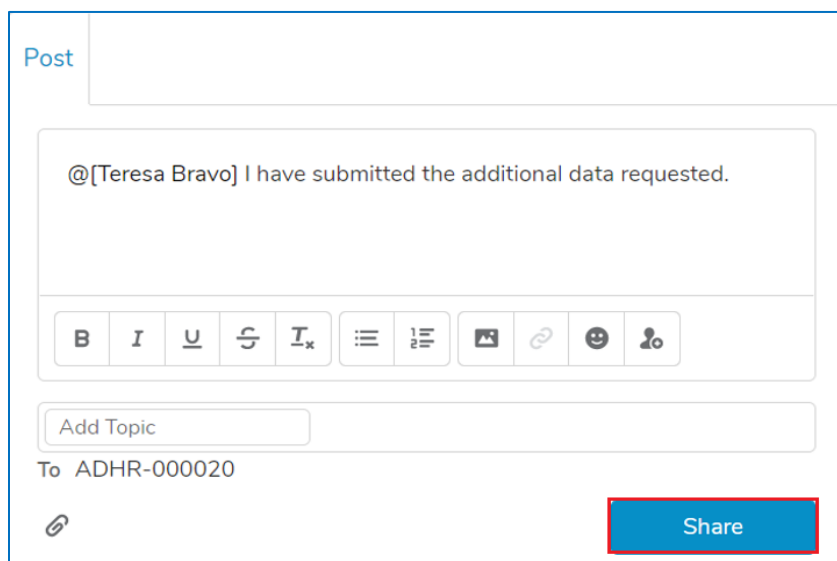
- On the homepage, click **View/Edit** to navigate to the routine report, ad hoc report, or data transfer for which you want to post a chatter message.

- Under "Post," place your cursor in the "Share an update" field.

- Tag the person you want to communicate with by typing: "@[Name]". This important step will allow Salesforce to automatically notify the user of the chatter message.

- Type your message and click **Share**. The user(s) you tag will receive an email notification.

- LDH users will reply to your message in chatter as needed. Salesforce will notify you via email of any responses.