

# Salesforce

## Naming Conventions & Status Fields

Default naming convention for records

- Consumer First Consumer Last    Date (YYYY-MM-DD)    Record Name
  - New Intake > Intake Name
    - **Wilma Mocil 2024-03-13 Intake**
  - New Action Plan > Name
    - **Wilma Mocil 2024-03-13 CDS Document Checklist**
  - New Case Plan > Case Plan Name
    - **Wilma Mocil 2024-03-13 CDS Case Plan**
  - New Authorization > Authorization Name
    - **Wilma Mocil 2024-03-13 Plan of Care March**

Status Fields

- Program Engagement
  - **Stage**
    - Use Active, Completed or Withdrawn unless instructed otherwise

Stage ⓘ

Active ▾

--None--

Applied

Application Denied

Waitlisted

Enrolled

✓ Active

Completed

Withdrawn

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## Status Fields (continued)

- Service Delivery
  - **Service Session** (examples Deanna Rose trip, Back to School)
    - Leave blank if service delivery is not tied to session such as above

A screenshot of a software interface showing a dropdown menu for the 'Service Session' field. The dropdown is open, displaying a search bar at the top with the text 'Search Service Sessions...'. Below the search bar, the menu is titled 'Recent Service Sessions' and lists two items: '3/8/2024: Deanna Rose' and '3/19/2024: Peer Support Tech Check'. Each item has a small blue icon to its left. The background shows other form fields like 'Service Provider' and 'Service Provider Agency/Business'.

- **Attendance Status**

- If you spoke to a consumer, they were **Present**. If they canceled or were a no show for an appointment, choose the appropriate option.

A screenshot of a software interface showing a dropdown menu for the 'Attendance Status' field. The dropdown is open, displaying a list of options: '--None--', 'RSVP', 'Present', 'Cancelled', and 'No Show'. The 'Present' option is highlighted in yellow. The background shows other form fields like 'Service Status' and 'Assistive Technology Use'.

- **Service Status**

- If you made contact with the consumer, choose **Successful**. Otherwise, choose **Unsuccessful**.

A screenshot of a software interface showing a dropdown menu for the 'Service Status' field. The dropdown is open, displaying a list of options: '--None--', 'Pending', 'Successful', and 'Unsuccessful'. The 'Successful' option is highlighted in grey. A small box with the text 'Successful' is overlaid on the 'Unsuccessful' option. The background shows other form fields like 'Assistive Technology Use' and 'AT Demo'.