

# Reporting Overview

In PlayMaker there are various dashboards, views, and reports available to measure your individual or team's performance.

## Overview Tab

The Overview tab in PlayMaker is preset to provide a summary of either individual or team activity.

The page will show the appropriate information depending on your role within the agency and PlayMaker.

- **Marketer Overview** - provides an at-a-glance summary view of scheduled events and month-to-date referrals for the individual user. This dashboard provides users with one point of focus that displays a summary of their referral productivity and current sales activities.
- **Manager Overview** - provides an at-a-glance summary view of your full team's scheduled events and month-to-date admits

The information included on this dashboard includes:

- Historical Referrals and Admit - month-to-date, year-to-date, or custom date range
  - For the individual user on the marketer view
  - Including the full hierarchy of the team for the manager view
- Scheduled Events
- Monthly Top Ten Primary Physicians - top ten primary physicians for the current month based on referrals with a status of "Admit."
- Monthly Top Ten Referring Facilities - top ten referring facility for the current month based on referrals with a status of "Admit."
- Monthly Top Ten Referring People - top ten referring person for the current month based on referrals with a status of "Admit."

## Dashboards Tab

The [Dashboard](#) tab offers each user the ability to create multiple dashboards with information aligned to their individual and team performance. The information available to display is limited to the user's role permissions. The default dashboard will display a variety of referral and admission statistics. [Click here](#) for more information on creating, editing, and using configurable dashboard.

### **Stats Tab**

On the Stats tab, a manager can [create admit goals](#) for their team. Once created, the manager can monitor the individual's progress as well as view historical goals. An individual user can see any goals that have been created for them and their progress to that goal. More information on creating goals is available in [this article](#).

### **Charts & Reporting Tabs**

The [Charts](#) and [Reporting](#) tab provide the most comprehensive information about your agency, team, and individual performance. Both tabs will limit the information provided to the role permission of the user. This means that most individual marketers will only see their own performance, and managers will see any individuals or teams that they have access to.

[Charts](#) offers a visual representation of the information and can be exported to a CSV (comma separated value spreadsheets) file. In addition the time range for the information can be adjusted. For more information on the various charts available [click here](#).

[Reporting](#) offers information and results in tabular format. This information can also be exported into a CSV file. In addition, the reports can be configured to include/exclude various data aspects and saved as a custom version. All reports can be scheduled to run on a regular basis and delivered via email. For more information on the reports [click here](#), for more information on configuring a report and scheduling for delivery [click here](#).