Contact Details

PlayMaker defines contacts as the individuals that are found at the account, and are the people that marketers/liaisons visit regularly.

Each Contact contains important information and details to assist in building and developing a relationship. The Contact profile has the following sections:

- **Contact Info:** key information about the contact
- **Shared Owners:** identifies the individuals in your agency that are responsible for this contact
- **Address Info:** address details
- **Profile:** additional personal information about the contact
- **Payor Mix:** % of patients seen based on payor/insurance
- Additional Notes
- **Record Details:** read-only section outlining data elements received from your EMR
- **Monthly Events:** marketing activities that have occurred or are scheduled to occur with this contact
- **Historical Call Notes:** notes from past marketing activities
- **Referrals:** associated referrals from this contact
- Additional Communication
- **Contact Health Index:** graphical representation of referrals, admits, and activities for the contact

Core Contact Information – Contact, Owner, Address, Profile Sections

The information contained in the Contact, Shared Owners, Address, and Profile sections provide a view into the contact. The following fields are important to efficient route call planning:

- Account – the account associated to this contact
- Targeted Contact – is this a contact you are currently focused on, or targeting?
    - Contacts imported from TargetWatch will be automatically set to “Yes”

- Contact Type – this is a drop down list of roles the contact may hold
    - This information is used in tracking of expenses and Stark II allocation
- Visit Frequency – indicate how often this contact should be visited (weekly, bi-weekly, monthly, quarterly)
    - Note this frequency may be different than the visit frequency for the account.
- Rating – indicate the strength of your relationship with the contact. A = “receive all/most of the referrals”; B = “receive a portion or split of the referrals”; C = …
- NPI – if a contact has an National Provider Identifier

Payor Mix

The Payor Mix section allows you to document the percentage of claims/patients by various insurance types for the contact.

Record Details

The Record Details section provides information on the source of the contact information. If your Electronic Health Record system is integrated into PlayMaker, these read-only fields will display the data elements as they were received from that system. If the record was created by importing from Market Intelligence Data (TargetWatch or Referral Source Database), it will be indicated as such.

Monthly Events

This section will show all events for the contact for the current month. The time period can be modified in the top right corner of the section to display a different timeframe. The New Event button will allow a user to create a new event right from the Contacts Details page. If an account is associated to the contact it will be automatically populated for the new event. The event creation page will prompt to add other contacts associated to the account as well.

Historical Notes

This is followed by the Historical Notes section. This offers notes from previous events with the contact, presented in a list with the most recent notes at the top. Historical notes from any user that services the contacts should be available to view, unless that permission has been revoked by the company's PlayMaker administrator in the Role Management settings.

Referrals

The Referrals section follows the Historical Notes, showing a list of all referrals for the contact.

Contact Health Index

The last section of the Contact Details page is the Contact Health Index. This area functions as a tool to see the return on investment regarding the number of events completed with a contact compared to the number of referrals generated by that contact over a rolling 12 week period. This can be further confirmed in the three-month trend at the bottom of the section.