PLAYMAKER CRM

SALES REPRESENTATIVE USER GUIDE

PlayMaker CRM Enterprise Edition

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PLAYMAKER CRM

First Things First: Logging in to PlayMaker CRM

Welcome to PlayMaker CRM! It's time to talk about navigating through the CRM system, but before you can do this for the first time, you must log in.

PlayMaker CRM is providing a dedicated URL to be used only for your company's training.

Before you can access PlayMaker, your administrator must add you to the system with at least one security role. Your security role and access rights within the organization determine what areas of the CRM system you are able to access and what you can do when you're there.

Logging in to PlayMaker CRM (Web):

1. Go to the customized URL provided in your **PlayMaker CRM Credentials email**.
2. Enter your **email address**.
3. Enter your unique PlayMaker **password**.
4. Click **Login**.

REMEMBER: If you're not sure what password to use, simply click **Forgot Your Password?**

WARNING: You have a dedicated URL for accessing the PlayMaker CRM web application (**your-companys-name.playmakercrm.com**). If you attempt to log in to PlayMaker from the main web site (playmakercrm.com) by clicking the Customer Login button, you will receive the following alert: You have entered incorrect login information or this account is not active. Please contact the administrator at your agency for assistance."

Logging in to PlayMaker CRM Mobile App (supported iOS devices only):

The PlayMaker CRM Mobile App was designed specifically for sales representatives to easily access PlayMaker on your iOS (iPhone or iPad) device. You can access PlayMaker CRM on any mobile device through that device's web browser by visiting **playmakercrm.com** and logging in.

When downloading from the App Store, be sure to install the **PlayMaker CRM Mobile 4** version.

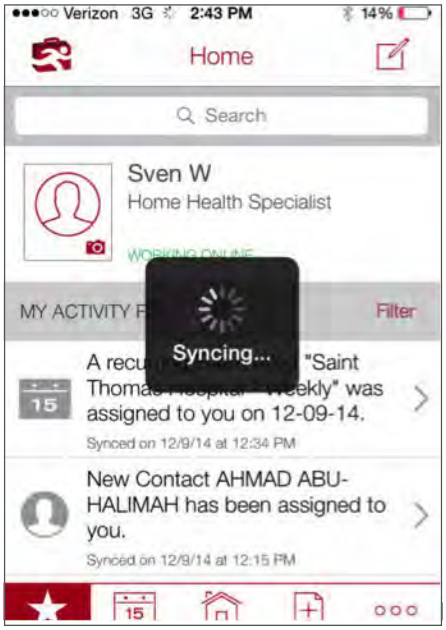
iPhone App Store Download Screen

Once you've successfully installed Mobile App, login by following these steps:

1. First, log in with your full username and password.

2. Click **Save**.

3. Your information will now sync with the PlayMaker server.



4. Congratulations! Once the sync completes you're now ready to begin using the Mobile App.

> **REMEMBER:** The first time you log in to PlayMaker CRM Mobile App, the system must sync your data, which may take up to two minutes depending on your connection speed.

This guide will assist sales representatives in navigating through PlayMaker CRM and utilizing the application's full capabilities to maximize your sales efficiency and effectiveness.

1. Introduction

PlayMaker CRM is a web-based contact relationship management solution designed specifically for home health, hospice and post-acute care companies. Its cloud-based nature allows users to securely access PlayMaker whenever and wherever they can access the internet. PlayMaker operates across multiple web browsers and on multiple platforms, and its mobile app, designed specifically for sales reps, can even work offline.

What do I need to use this guide?

The only requirement for this guide is that you have a valid PlayMaker CRM account using one of our supported browsers: Microsoft® Internet Explorer®, Mozilla® Firefox®, Google® Chrome™, or Apple® Safari®.

TIP: Many of the features contained in this guide are available through the web application only. You will need to be assigned to a User Role designated with the sales representatives privilege.

Who is this guide for?

This guide is for sales representatives. Regardless of whether you're an expert in using CRM or new to CRM, this guide will help enhance your knowledge in all key areas needed to successfully manage your referral sources.

Customer feedback

Feedback from our customers is always welcome! The best way to help us improve is by letting us know how we can help. Please email any suggestions to **trainingguides@playmakercrm.com**.

Icons used in this guide

As you use this guide, keep an eye out for these helpful icons.

REMEMBER ICON: These are important things to remember and get in the habit of doing.

TIP ICON: Follow these efficiency-boosting suggestions to become a PlayMaker CRM Super User.

WARNING ICON: Danger! Pay careful attention to these wise words.

2. Taking a first look at PlayMaker CRM

Sales Representative Dashboard Example

Sales Representative Dashboard

The Sales Representative Dashboard provides an at-a-glance summary view of your scheduled events and month-to-date referrals displayed. The dashboard provides users with one point of focus that displays a summary of their referral productivity and current sales activities.

- **Recent Referrals:** This area will display all recent referral activity within the last 48 hours.
- **My To-Do List:** Think of the To-Do List as a private notepad to jot down ideas, tasks or any personal notes you'd like to keep track of.

> **REMEMBER:** The To-Do List is not for tracking call/visit notes. Those should be attached directly to the sales event.

- **Monthly Top Ten Primary Physicians:** Displays the top ten primary physicians for the current month based on referrals with a status of "Admit."
- **Monthly Top Ten Referring Facilities:** Displays the top ten referring facility for the current month based on referrals with a status of "Admit."
- **Monthly Top Ten Referring People:** Displays the top ten referring person for the current month based on referrals with a status of "Admit."

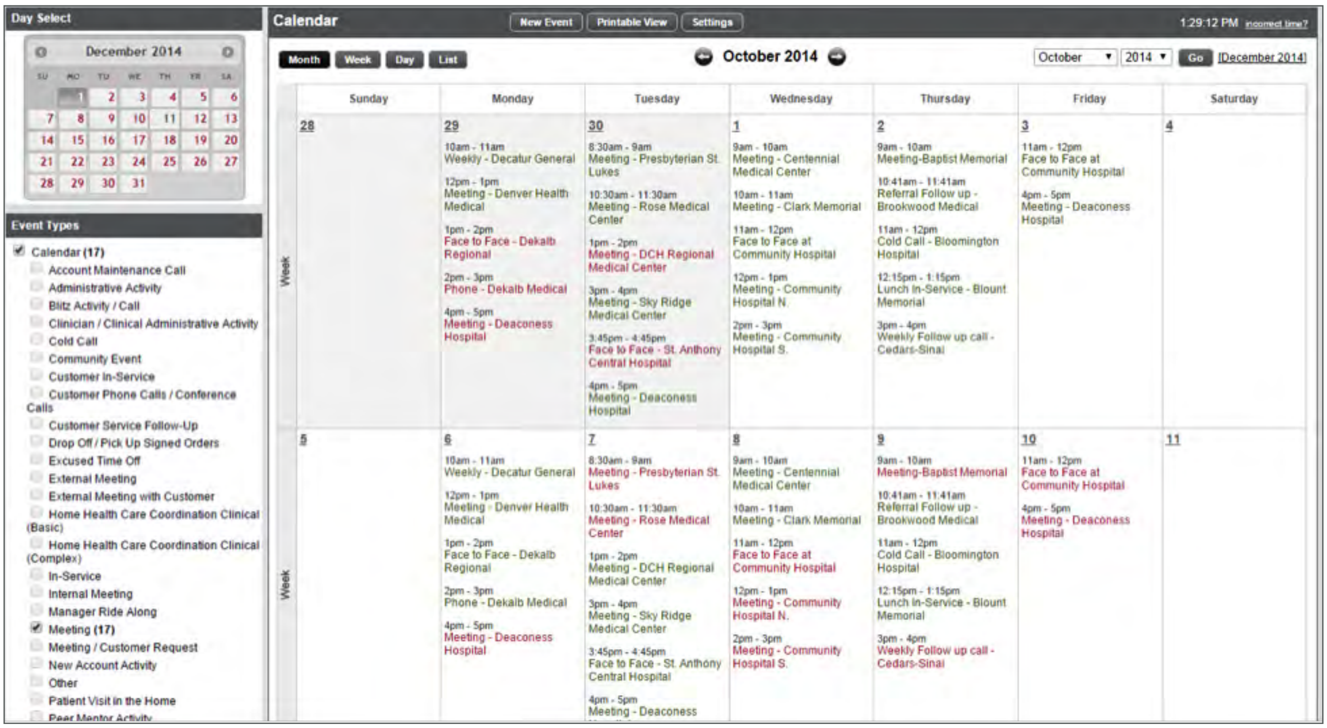
- **Create New:** This feature is designed to quickly allow a user to create a contact, account, event or expense.

  TIP: Follow the A-C-E methodology for creating sales events. While this offers a quick way to open the new event interface, following the A-C-E method for creating Events will save you time in the long run. See page 46 for more information on the A-C-E method.

- **Bookmarks:** Bookmarks are a timesaving feature built into PlayMaker to allow you to easily access pages you use frequently (e.g., a specific account or contact).

- **Calendar Events:** Calendar events are displayed at the bottom of the screen in the area labeled Events. These tie in directly with the PlayMaker calendar.

Calendar Overview



Sales Representative Calendar example

PlayMaker's calendar is an ideal way for users to remain organized. It allows sales representatives to easily see what activities they have planned with their marketing efforts.

To display your calendar, click the **Calendar** tab, which is located in the main menu bar at the top of the screen, just below the PlayMaker logo.

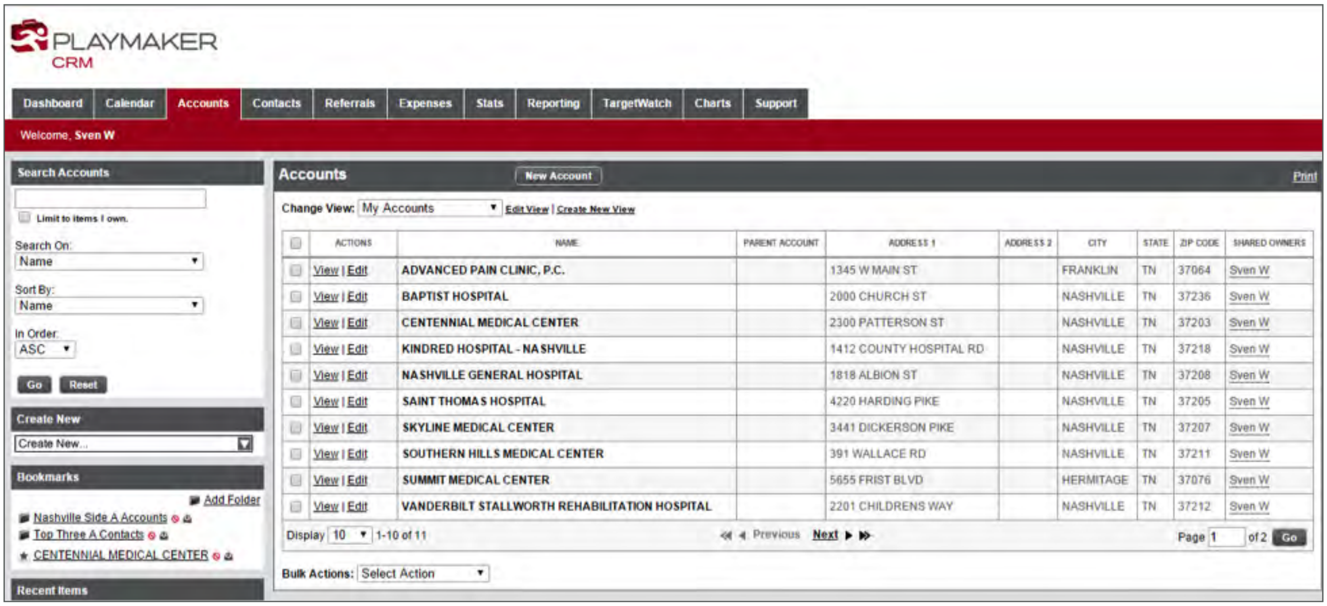
- Calendar events can be viewed in different ways using a variety of display settings. Available views are: **Month, Week, Day** and **List** view.

- Color coding allows ease of visibility to differentiate between sales activities that have been completed with call notes and those that haven't.

REMEMBER: Green sales events indicate that the Call/Visit note has been correctly attached, and the event has been marked as Completed. Not marking events as complete is a common mistake made by sales reps which can negatively impact Business Intelligence and reporting.

- The notes summary tool tip provides an easy pop-up interface when an activity is highlighted. This provides additional details about an activity without having to open it up to see all of its information.

Accounts and Contacts



Default My Accounts View

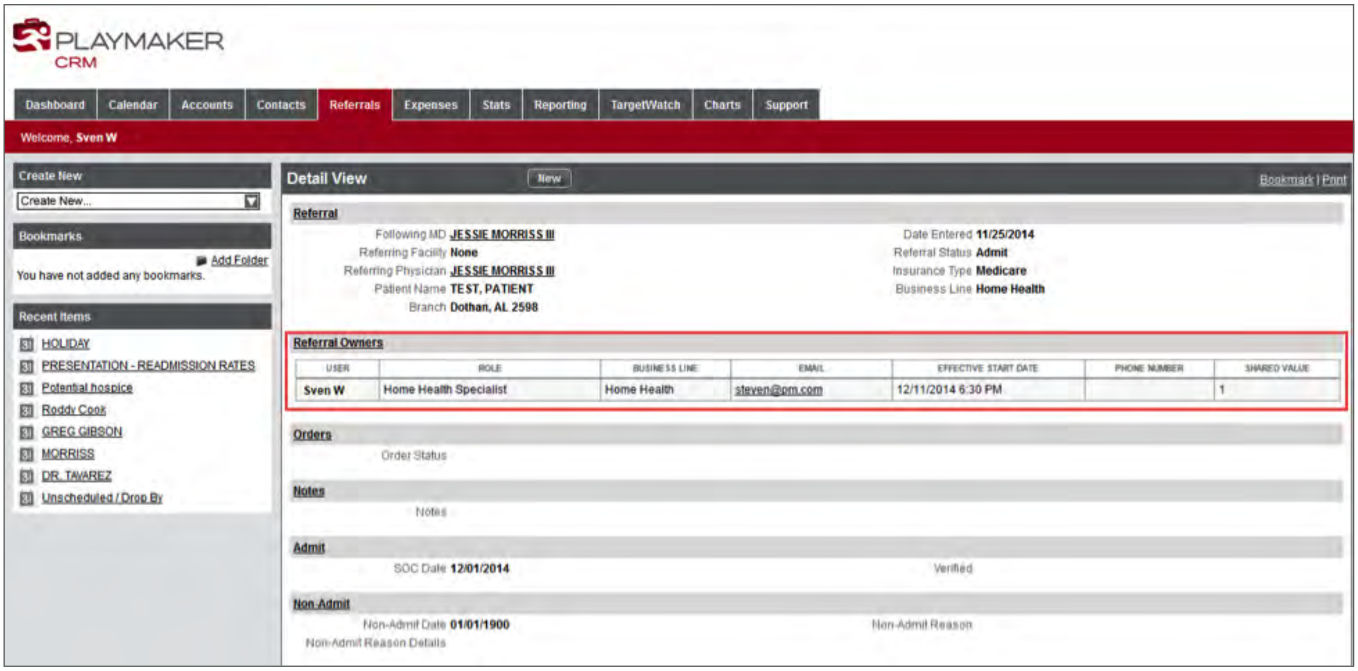
Referral Sources in PlayMaker CRM are categorized into two main groups in PlayMaker: Accounts and Contacts.

- Accounts: These are facilities such as doctor's offices, hospitals, clinics and other brick-and-mortar places that house referral sources.
  - Access accounts by clicking on the **Accounts** tab, which is located in the main menu bar at the top of the screen.
- Contacts: These are individual referral sources such as physicians, case managers and discharge planners.
  - Access contacts by clicking on the **Contacts** tab, which is located in the main menu bar at the top of the screen.

Referrals

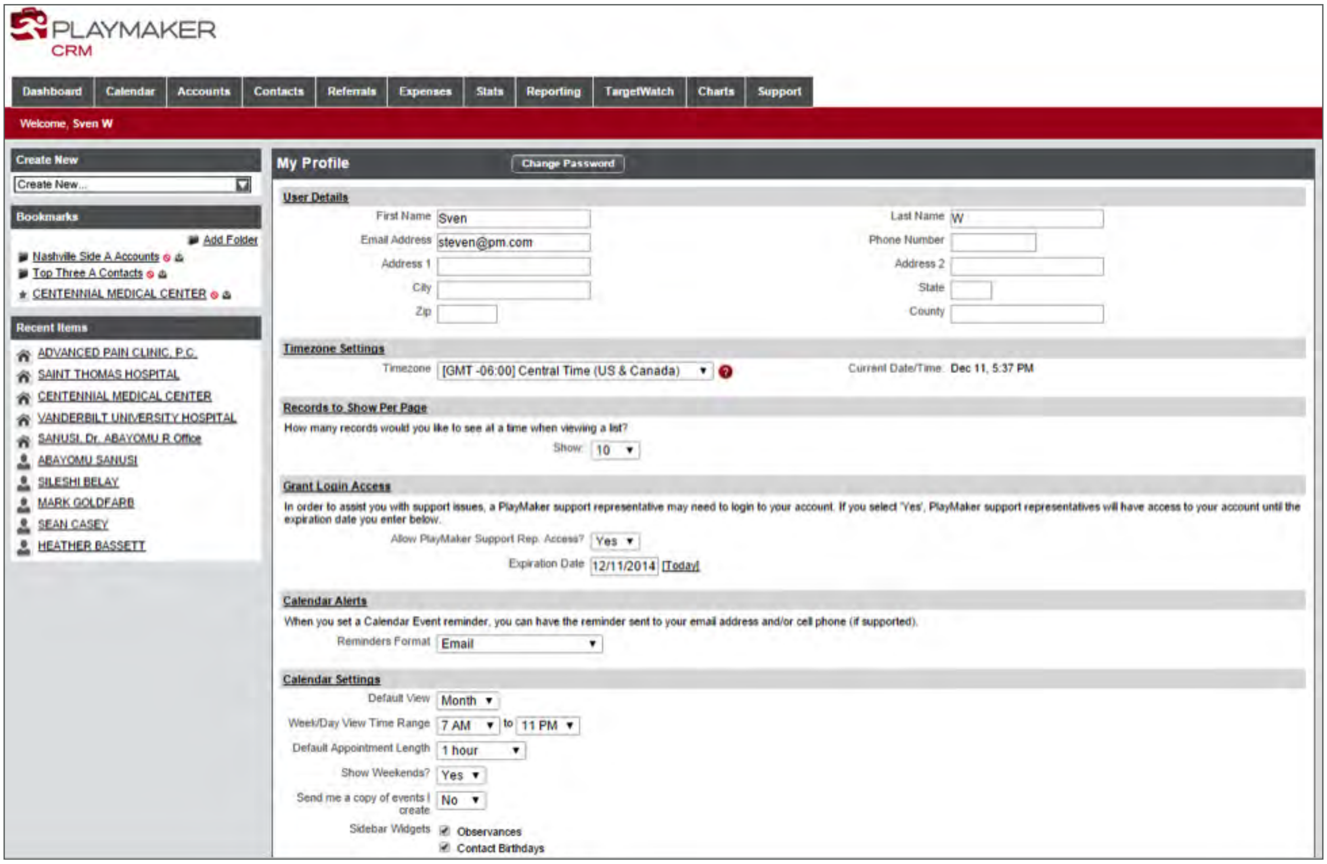
All referral information for your agency is located under the Referrals tab. In PlayMaker, the presumption is all referrals come from referring physicians or referring facilities. Even if a referral comes from ABC Hospital, PlayMaker still tracks all pertinent details received directly from your patient care system such as insurance type, payor type, attending physician, non-admit reasons, etc. In addition to these types of individuals, some EMRs track key decision makers, or referring persons, which PlayMaker also has the ability to track.

- Access referrals by clicking on the **Referrals** tab, which is located in the main menu bar at the top of the screen.
- Referral Owners will display the shared credit each sales person has for a specified referral.



Shared referral value for multi-owners

3. My Profile



Configuring My Profile

When logging into PlayMaker for the first time, users should visit My Profile to ensure all information is accurate.

- Access My Profile by clicking on the **My Profile** link, which is located in the small menu bar at the top right corner of the screen.
- You may want to change your password. To do this, click on the **Change Password** button, located in the black bar labeled My Profile. Follow the prompts to successfully change your password.
- View the main My Profile display and confirm that your **User Details** are correct, including name, email address, phone number, street address, city, state and ZIP code. It is important to have the correct street address, city, state and ZIP code because several areas of PlayMaker use this data. Please note that the address entered is not required to be your office address, but can be your home address or any other address that works best for you.
- **Time zone Settings** is located directly below User Details in the main My Profile display. Review and verify the correct time zone is selected for your region.
  - To change the time zone, click on the dropdown menu and select the appropriate time zone. Immediately to the right of this dropdown is a reading of the current date and time. Review this to ensure the correct time zone has been selected.
- **Records to Show Per Page** is located directly below Time zone Settings in the main My Profile display. The number indicated here is the number of results that will be displayed per page by default as you navigate through PlayMaker.

1. To change the default number of records displayed per page, click on the dropdown menu and select the number you would like: 10, 25, 50 or 100.

2. Regardless of the setting you choose, you will still have the option to change the number of records displayed each time results are listed for a search.

TIP: Having this set at a smaller number of records may provide a faster load time.

- **Grant Login Access** is located directly below Records to Show Per Page in the main My Profile display. PlayMaker does not have the ability to enter your account without your permission. You may want to grant this permission in the event that you experience an issue that requires PlayMaker Support's assistance.

1. To allow PlayMaker Support to access your account, click on the dropdown menu beside the question **"Allow PlayMaker Support Rep. Access?"** and change the response to Yes.

2. You then will select a date for this permission to expire.

3. Allowing PlayMaker Support to access your account does not require you to share or change your password.

- **Calendar Alerts** is located directly below Grant Login Access in the main My Profile display. Calendar alerts are reminders sent to you about activities created in PlayMaker's calendar (e.g., If you schedule a meeting with a contact at 10 a.m. tomorrow, you can schedule to be notified about the event at 9 a.m. tomorrow). Notifications can be emailed, sent as text messages to your cell phone, or both.

1. To select your preferred reminder format, click on the dropdown menu beside the **Reminders Format** label. Select email, text message or email and text message.

2. If you choose to have alerts sent via text message, you will then be presented with windows to select your cell phone carrier from a dropdown menu, as well as enter in your 10-digit phone number. Click on the **Test this Number** option below this field to ensure the number has been entered correctly. A test message will then be sent to your cell phone.

- **Calendar Settings** is located directly below Calendar Alerts in the main My Profile display. This feature allows you to customize your calendar to meet your unique needs.

TIP: You must click on the **Save Profile** button at the bottom of the screen after you make any changes to ensure they remain in PlayMaker.

1. To change your calendar's default view, click on the dropdown menu beside the **Default View** label. You can then select whether your calendar will be displayed with a month, week, day or list view. Although this will be the default view, you still will be able to change the view each time your calendar is displayed.

2. If selecting the week or day options, you will then have the ability to further specify what time the day begins and ends. Change this information by **selecting starting and ending times** from the dropdown menus located beside the Week/Day View Time Range label.

3. Appointments set in the calendar automatically will be assigned a length depending on the time specified in the dropdown menu located beside the **Default Appointment Length** label. Select the time that corresponds to the types of activities your agency schedules most often. Options are 15 minutes, 30 minutes, 45 minutes, one hour and two hours.

4. If an sales representative has a goal of making more than 10 appointments per day, it may be beneficial to change the default appointment length to either 15 or 30 minutes.

5. Select whether weekends will be displayed in your calendar view by selecting the appropriate option from the dropdown menu located beside the **Show Weekends?** label.

6. You may select whether to have a copy of all events you create in PlayMaker automatically sent to an external email program such as Outlook. Select your preference from the dropdown menu beside the **Send me a copy of events I create** label.

   TIP: Because you also have the ability to send a copy to your email each time you create an event, it may be advisable to leave this setting at No if you do not plan to send all of them out.

- **Sidebar Widgets** are additional notations you may want displayed in your calendar, such as contact birthdays and holiday/health care observances. Place a check mark beside the options you would like to appear in your calendar.

  When you view your calendar these will be listed on the left side of the screen under the labels **Observances** and **Contact Birthdays**.

4. Book of Business

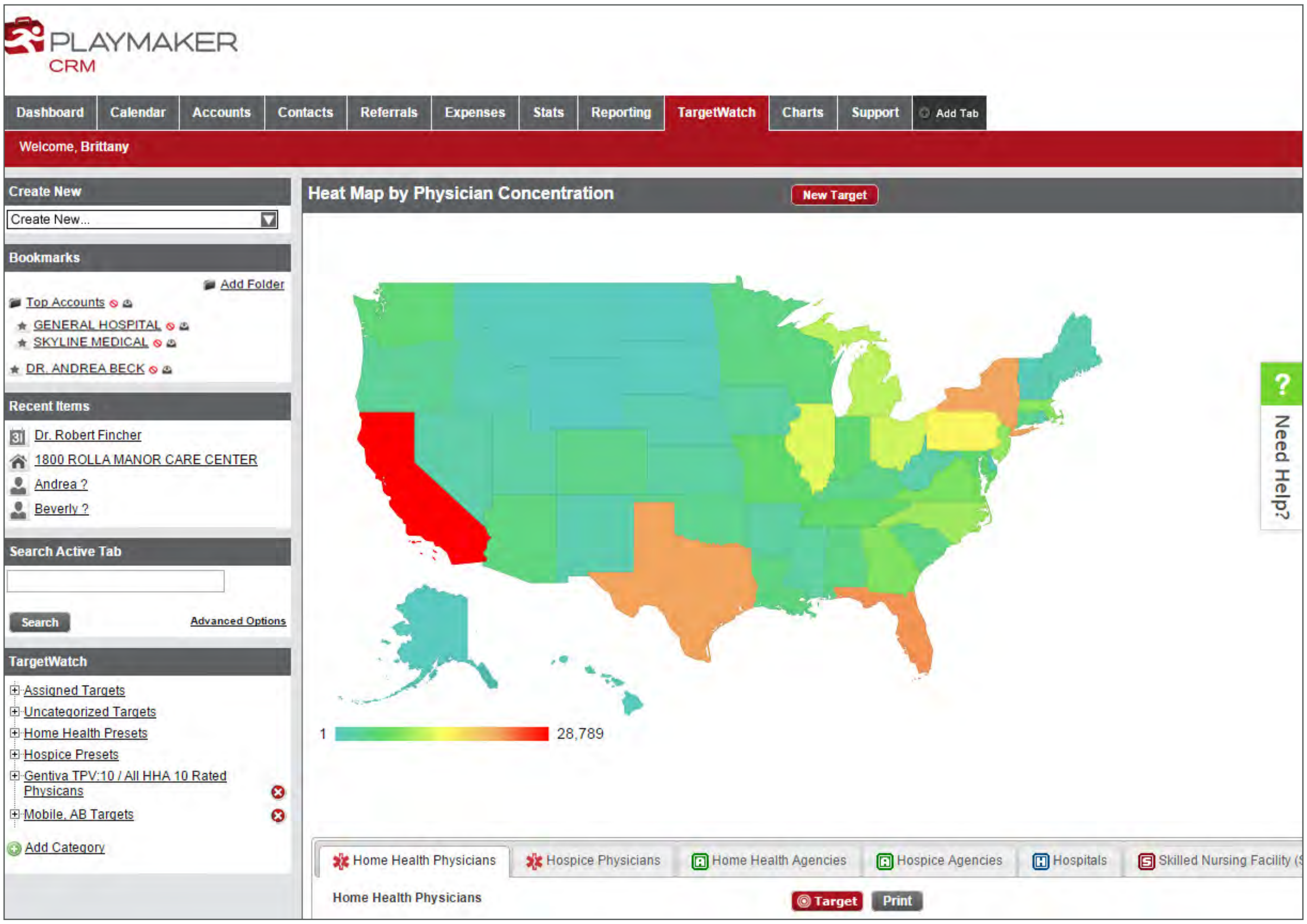
PlayMaker defines a book of business as all referral sources (contacts and accounts) currently assigned to each user. Once these are entered into PlayMaker, you will have an effective way to both see and manage them. When you begin using PlayMaker, contacts and accounts will have no data.

REMEMBER: Be sure to remember that Contacts are people who refer, and Accounts are the referring facilities in which these people work. Each contact should be attached an account.

PlayMaker provides two tools to develop the book of business: **TargetWatch** and the **Referral Source Database**. Information in TargetWatch is provided by our data partner, Health Market Science, and is based on adjudicated claims from Medicare and other payer sources. In addition to providing historical referral trends, TargetWatch provides pertinent contact information. The Referral Source Database provides only contact information for both Accounts and Contacts, including their National Provider Identifier numbers.

The following are ways to find accounts and contacts and build your book of business.

5. TargetWatch – Creating a Target



TargetWatch Home Page

TargetWatch is an excellent way to bring physicians and facilities into PlayMaker.

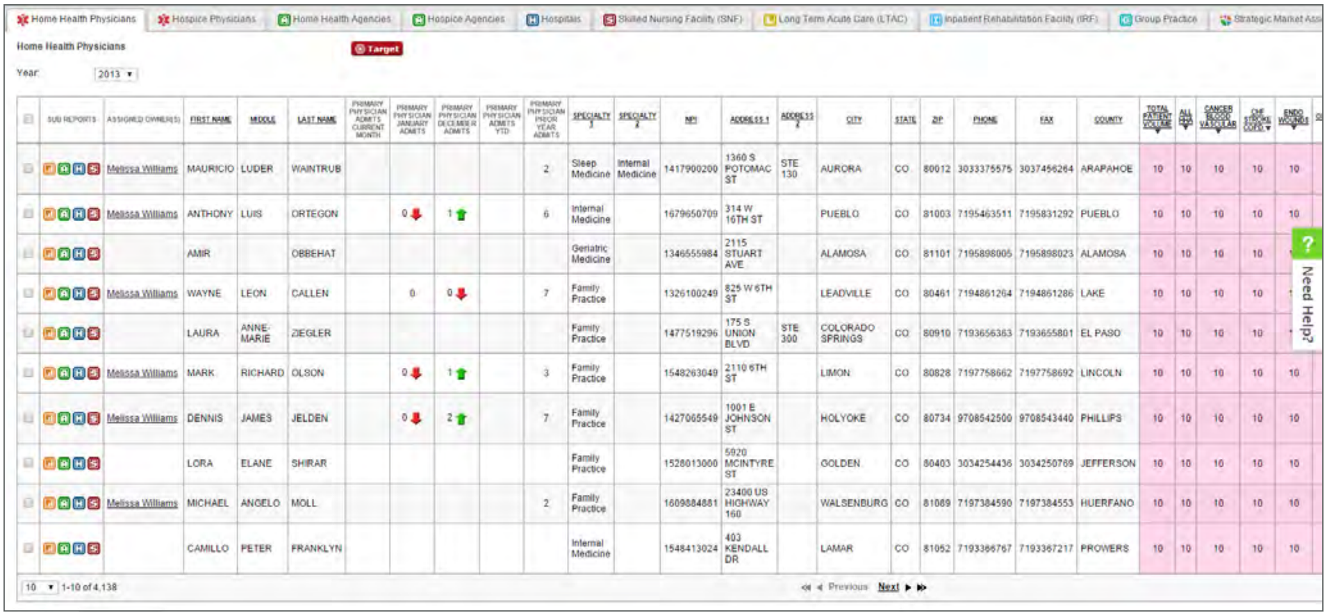
1. Begin by clicking on the **TargetWatch** tab, which is located in the main menu bar at the top of the screen. Your agency's map will then be displayed. Only states you have purchased data for will appear in color. The remaining states will be gray.
2. Click on the appropriate **state** from the resulting map.
3. If you would like to get county-specific data, click on the county for which you would like information from the resulting map. Click on **Zoom to county** in the window that appears beside the county you have selected.
4. To view county information, scroll down to the area below the map of the selected county.
5. If you would like to get ZIP code-specific data, click on the ZIP code for which you would like information from the resulting map. Click on **Zoom to ZIP code** in the window that appears beside the ZIP code you have selected.
6. To view ZIP code information, scroll down to the area below the map of the selected ZIP code.

7. Several navigation tabs appear just below the map of the area you selected, though these may vary depending on the information you have purchased. They include **Home Health Physicians, Hospice Physicians, Agencies, Hospitals, LTCs & SNFs** (long-term care and skilled nursing facilities), **Group Practice, and Strategic Market Assessment.**

Physicians

Favorable physicians, or contacts, are easily identifiable using Health Market Science decile rankings. In this example, we will search for home health physicians.

- Click on the **Home Health Physicians** tab in the menu bar located below your map.



SUB REPORTS	ASSIGNED OWNER(S)	FIRST NAME	MIDDLE	LAST NAME	PRIMARY PHYSICIAN ADMITS CURRENT MONTH	PRIMARY PHYSICIAN JANUARY ADMITS	PRIMARY PHYSICIAN DECEMBER ADMITS	PRIMARY PHYSICIAN ADMITS YTD	PRIMARY PHYSICIAN PRIOR YEAR ADMITS	SPECIALTY 1	SPECIALTY 2
	Melissa Williams	MAURICIO	LUDER	WAINTRUB					2	Sleep Medicine	Internal Medicine
	Melissa Williams	ANTHONY	LUIS	ORTEGON		0	1		6	Internal Medicine	
		AMIR		OBBEHAT						Geriatric Medicine	
	Melissa Williams	WAYNE	LEON	CALLEN		0	0		7	Family Practice	
		LAURA	ANNE-MARIE	ZIEGLER						Family Practice	
	Melissa Williams	MARK	RICHARD	OLSON		0	1		3	Family Practice	
	Melissa Williams	DENNIS	JAMES	JELDEN		0	2		7	Family Practice	
		LORA	ELANE	SHIRAR						Family Practice	
	Melissa Williams	MICHAEL	ANGELO	MOLL					2	Family Practice	
		CAMILLO	PETER	FRANKLYN						Internal Medicine	

LAST NAME	NPI	ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP	PHONE	FAX	COUNTY	TOTAL PATIENT VOLUME	ALL HHA	CANCER BLOOD VASCULAR	CHF STROKE COPD	ENDO WOUNDS
WAINTRUB	1417900200	1360 S POTOMAC ST	STE 130	AURORA	CO	80012	3033375575	3037456264	ARAPAHOE	10	10	10	10	10
ORTEGON	1679650709	314 W 16TH ST		PUEBLO	CO	81003	7195463511	7195831292	PUEBLO	10	10	10	10	10
OBBEHAT	1346555984	2115 STUART AVE		ALAMOSA	CO	81101	7195898005	7195898023	ALAMOSA	10	10	10	10	[illegible]
CALLEN	1326100249	825 W 6TH ST		LEADVILLE	CO	80461	7194861264	7194861286	LAKE	10	10	10	10	[illegible]
ZIEGLER	1477519296	175 S UNION BLVD	STE 300	COLORADO SPRINGS	CO	80910	7193656363	7193655801	EL PASO	10	10	10	10	[illegible]
OLSON	1548263049	2110 6TH ST		LIMON	CO	80828	7197758662	7197758692	LINCOLN	10	10	10	10	10
JELDEN	1427065549	1001 E JOHNSON ST		HOLYOKE	CO	80734	9708542500	9708543440	PHILLIPS	10	10	10	10	10
SHIRAR	1528013000	5920 MCINTYRE ST		GOLDEN	CO	80403	3034254436	3034250769	JEFFERSON	10	10	10	10	10
MOLL	1609884881	23400 US HIGHWAY 160		WALSENBURG	CO	81089	7197384590	7197384553	HUERFANO	10	10	10	10	10
FRANKLYN	1548413024	403 KENDALL DR		LAMAR	CO	81052	7193366767	7193367217	PROWERS	10	10	10	10	10

10 1-10 of 4,138 Previous Next

TargetWatch Home Health Physicians Tab

- Next, you must determine which physicians to add directly into PlayMaker.

1. Examine the decile rankings PlayMaker provides for each physician. These are visible in the display that appears after clicking on the Home Health Physicians tab. These ratings of 1-10 are located as part of the record for each physician and are color coded. They are listed under the column headings of **Total Patient Volume, All HHA, Cancer Blood Vascular, CHF Stroke COPD, Endo Wounds, Ortho, and Urinary Kidney GI**. Higher numbers indicate a better score in that category.

TOTAL PATIENT VOLUME	ALL HHA	CANCER BLOOD VASCULAR	CHF STROKE COPD	ENDO WOUNDS	ORTHO	URINARY KIDNEY GI
10	10	10	10	10	10	10

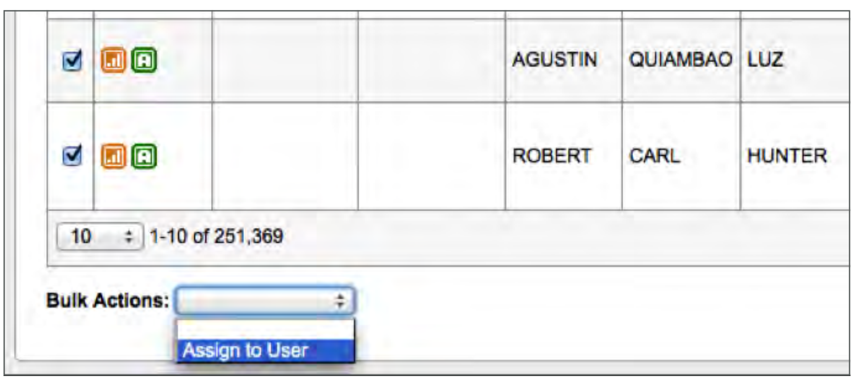
2. To sort rankings by column topic (e.g., to see which physician has the best referrals to home health), click on the **column heading**. The results will be re-sorted in the order of highest to lowest for that value. Additional information also is available when looking at physicians: Primary Agency, Predominant Market Share and Number of Associated Agencies (the number of agencies they work with).

TOTAL PATIENT VOLUME ▼	ALL HHA ▼	CANCER BLOOD VASCULAR ▼	CHF STROKE COPD ▼	ENDO WOUNDS ▼	ORTHO ▼	URINARY KIDNEY GI ▼

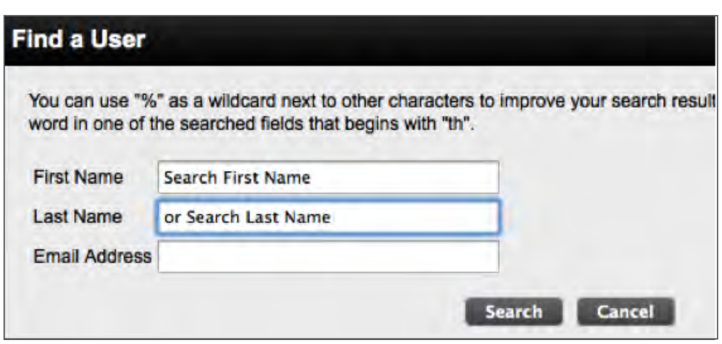
3. To determine which individuals are already in PlayMaker, view the ownership of the contact, which is located in the Home Health Physicians display immediately to the left of each physician name. Those that are already assigned to your users will have that user's name listed under **Shared Owners**.

SHARED OWNERS	FIRST NAME	MIDDLE	LAST NAME	REFERRING PERSON ADMITS CURRENT MONTH	REFERRING PERSON OCTOBER ADMITS	REFERRING PERSON SEPTEMBER ADMITS	REFERRING PERSON ADMITS YTD	REFERRING PERSON PRIOR YEAR ADMITS	SPECIALTY 1	SPECIALTY 2	NPI
Betsy McNeil Brent Ellenburg	STEVEN	AARON	SENSENEY	33 ↓	45 ↑	30 ↑	120	210	Family Practice		1013011014
Brent Ellenburg	WAYNE	LEON	CALLEN						Family Practice		1326100249
Bill Cook	JAMES	DAVIS	LUECKE	22 ↓	27 ↑	14 ↑	78	195	Family Practice		1184692881
	SHOUPING		LI						Cardiology	Family Practice	1699741041

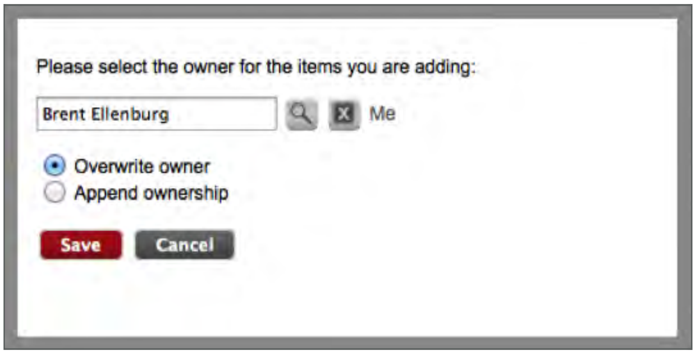
4. Physicians that are not assigned to any user can be added to a user's book of business by clicking on the **check box** to the far left of the physician record (You may add several individuals at once by clicking on the check boxes for multiple entries).



■ Scroll to the bottom of the screen. From the dropdown menu labeled **Bulk Actions**, select **Assign to User.**



- Click on the **text entry box** that appears on your screen and select the name of the user you would like to assign ownership of this account by clicking on the word Select, which is located under the Actions column heading on the far right of the employee listing.

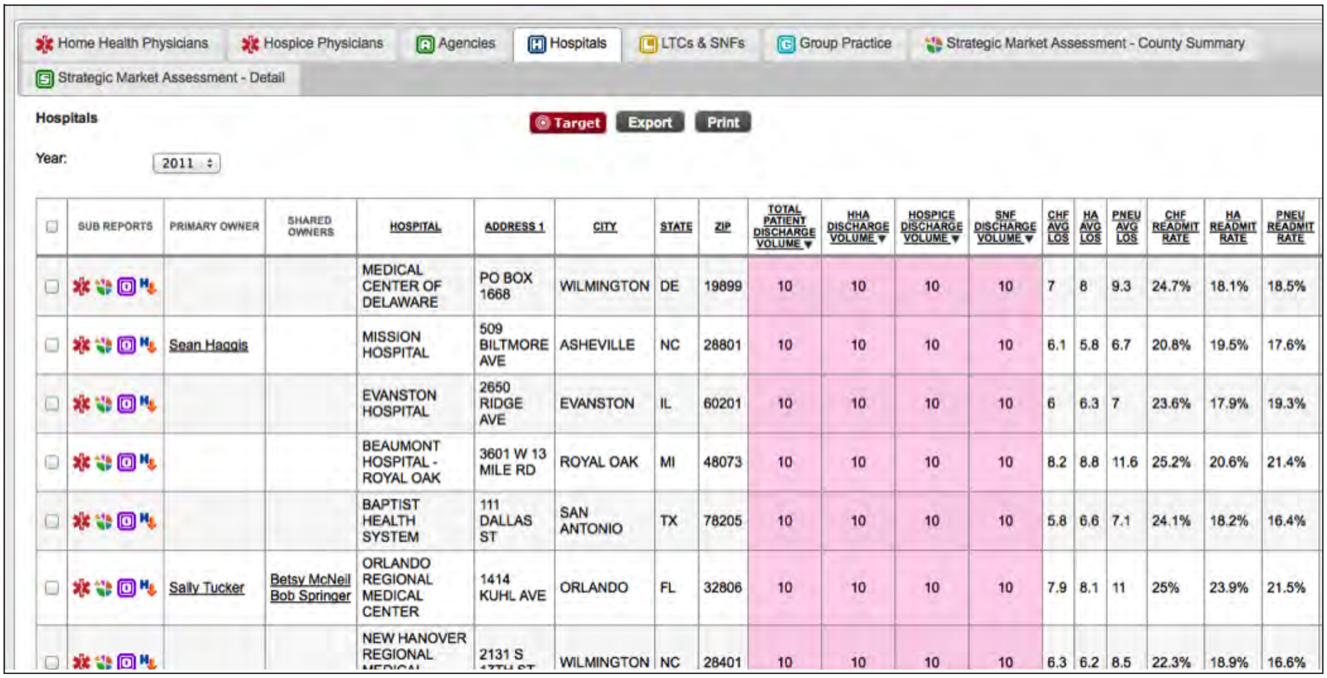


- In the resulting box that reads "Please select the owner for the items you are adding," select the **Overwrite Owner** option and then click on the **Save** button. A screen alert will confirm the accounts were added successfully.
- Verify the new ownership of these accounts by confirming the user's name has been added under the **Primary Owner** column of the displayed list of physicians.

Facilities

Remember, facilities in PlayMaker are synonymous with accounts. Begin by searching for facilities that are likely to provide referrals to your agency. In this example, we will search for hospitals.

1. Click on the **Hospitals** tab in the menu bar located below your map.



SUB REPORTS	PRIMARY OWNER	SHARED OWNERS	HOSPITAL	ADDRESS 1	CITY	STATE	ZIP	TOTAL PATIENT DISCHARGE VOLUME	HHA DISCHARGE VOLUME	HOSPICE DISCHARGE VOLUME	SNF DISCHARGE VOLUME	CHF AVG LOS	HA AVG LOS	PNEU AVG LOS	CHF READMIT RATE	HA READMIT RATE	PNEU READMIT RATE
			MEDICAL CENTER OF DELAWARE	PO BOX 1668	WILMINGTON	DE	19899	10	10	10	10	7	8	9.3	24.7%	18.1%	18.5%
	Sean Haggis		MISSION HOSPITAL	509 BILTMORE AVE	ASHEVILLE	NC	28801	10	10	10	10	6.1	5.8	6.7	20.8%	19.5%	17.6%
			EVANSTON HOSPITAL	2650 RIDGE AVE	EVANSTON	IL	60201	10	10	10	10	6	6.3	7	23.6%	17.9%	19.3%
			BEAUMONT HOSPITAL - ROYAL OAK	3601 W 13 MILE RD	ROYAL OAK	MI	48073	10	10	10	10	8.2	8.8	11.6	25.2%	20.6%	21.4%
			BAPTIST HEALTH SYSTEM	111 DALLAS ST	SAN ANTONIO	TX	78205	10	10	10	10	5.8	6.6	7.1	24.1%	18.2%	16.4%
	Sally Tucker	Betsy McNeil Bob Springer	ORLANDO REGIONAL MEDICAL CENTER	1414 KUHL AVE	ORLANDO	FL	32806	10	10	10	10	7.9	8.1	11	25%	23.9%	21.5%
			NEW HANOVER REGIONAL	2131 S	WILMINGTON	NC	28401	10	10	10	10	6.3	6.2	8.5	22.3%	18.9%	16.6%

TargetWatch Hospitals Tab

REMEMBER: Your view of available facility data may vary based on the data purchased.

2. Next, you must determine which hospitals to add directly into PlayMaker.

3. Examine the **decile rankings** PlayMaker provides for each facility. These are visible in the display that appears after clicking on the Hospitals tab. These ratings of 1-10 are located as part of the record for each facility and are color coded. They are listed under the column headings of **Total Patient Discharge Volume, HHA Discharge Volume, Hospice Discharge Volume, and SNF Discharge Volume.** Higher numbers indicate a better score in that category.

4. To sort rankings by column topic (e.g., to see which facility has the most discharges to hospice), click on the **column heading**. The results will be re-sorted in the order of highest to lowest for that value.

5. To determine which facilities are already in PlayMaker, view the ownership of the account (your agency employee who is responsible for this facility), which is located in the Hospitals display immediately to the left of each hospital name. Those that are already assigned to your users will have a user's name listed as either **Primary Owner** or **Shared Owner**.

6. Facilities that are not assigned to any user can be added to a user's book of business by clicking on the **check box to the far left of the hospital record** (You may add several facilities at once by clicking on the check boxes for multiple entries).

7. Scroll to the bottom of the screen. From the dropdown menu labeled **Bulk Actions**, select **Assign to User**.

8. Click on the **text entry box** that appears on your screen and select the name of the user you would like to assign ownership of this account by clicking on the word **Select**, which is located under the Actions column heading to the far right of the employee listing.

9. In the resulting box that reads "Please select the owner for the items you are adding," select the **Overwrite Owner** option and then click on the **Save** button. A screen alert will confirm the accounts were added successfully.

10. Verify the new ownership of these accounts by confirming the user's name has been added under the **Primary Owner** column of the displayed list of facilities.

Creating "basic" targets the easy way

You can manage the data in TargetWatch to narrow your focus to any area you like. Do this by creating targets. In this example we will narrow a large display of physicians to one that is more manageable by focusing on those that have a strong patient volume and large number of referrals to home health.

1. Click on the **tab of the category** you would like to narrow from the menu bar located just below your map (e.g., Home Health Physicians).

2. Click on the **Target** button, which is located immediately above the display of results and below the category tabs in the menu bar. This will save the information that is currently displayed as a target.

3. Click on the button **Edit Target**, which is located immediately above the display of results and below the category tabs in the menu bar. A window labeled **Advanced Target Builder** will appear.

4. Using the dropdown menus under the **Basic** tab, select the criteria you would like to use to narrow the target (e.g., select state and county for your region).

5. Under the **Filter** tab, add your preferred conditions by selecting them from the dropdown menus (e.g., Total Patient Volume, Greater than, and 5 [decile ranking]). Click **Add filter**.

6. Repeat this step to narrow the conditions as much as you prefer.

7. Click **Save**. An alert will appear on the screen to confirm the target has been saved.

8. The resulting list will be smaller and more manageable than the potentially thousands of results that might be displayed without filtering. See the total number of records available by scrolling to the bottom of the display and viewing the number beside the indication of the **number of results displayed per page**.

9. Add individuals from the refined target to your book of business by clicking on the **check box** to the far left of the desired record (You may add several individuals/facilities at once by clicking on the check boxes for multiple entries).

10. Scroll to the bottom of the screen. Under the dropdown menu labeled **Bulk Actions** select **Assign to User.**

11. Click on the **text entry box** that appears on your screen and select the name of the user you would like to assign ownership of this account by clicking on the word **Select**, which is located under the Actions column heading on the far right of the employee listing.

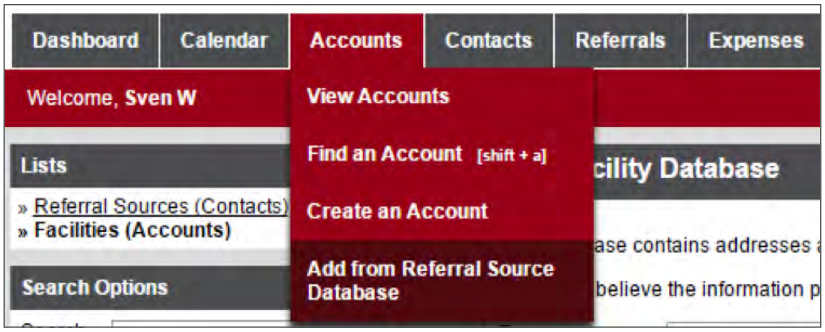
12. In the resulting box that reads "Please select the owner for the items you are adding," select the **Overwrite Owner** option and then click on the **Save** button. A screen alert will confirm the accounts were added successfully.

13. Verify the new ownership of these accounts by confirming the user's name has been added under the **Primary Owner** column of the displayed list of contacts or accounts.

REMEMBER: Organize your targets! By default, all saved targets are initially saved to and listed under the Uncategorized Targets category on the left side of the screen. Users can create their own unique categories (Top Physicians in My Market, Top Educational Opportunities, Top Hospitals, etc.) Once you've built out meaningful categories, just drag the target by clicking and holding the left mouse button over the target you've built and drag it into the relevant category below.

6. Referral Source Database

The Referral Source Database is another way to add contacts and accounts to your book of business. The Referral Source Database is a registry of all the people in the United States who have NPI (National Provider Identifier) numbers. Information is collected from CMS to provide an easy way for PlayMaker users to add these individuals to their books of business.

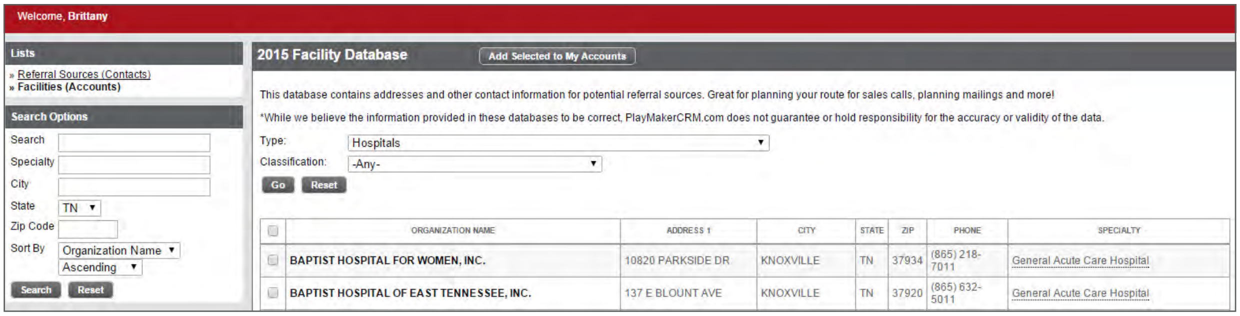


Add an Account from PlayMaker's built-in Referral Source Database

1. Access the Referral Source Database by hovering over the Accounts or Contacts tab in the main navigation and clicking on the **Add from Referral Source Database** option.
2. On the left side of the main Referral Source Database page in PlayMaker are a number of filtering options under the **Search Options** heading. Select the city and state you want to view. Click **Search**.
3. The resulting list will display all those individuals/facilities that are not currently in your PlayMaker book of business. View the total number of entries by scrolling to the bottom of the list and viewing the number beside the indication of the number of results displayed per page.

You can easily filter your results further.

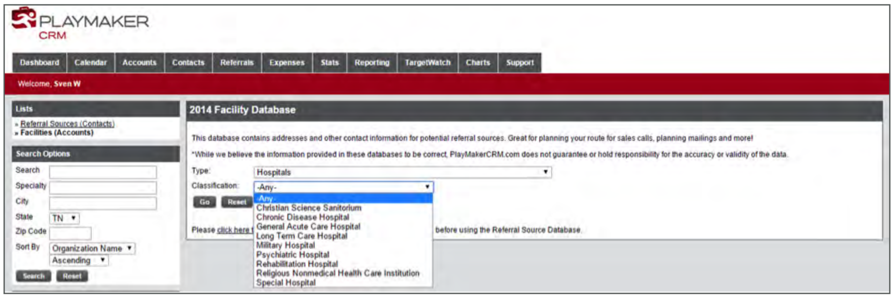
1. Search only for those in a certain **ZIP code** by entering the appropriate ZIP code under the **Search Options** heading. Click **Search**.



Referral Source Database: Search Options

2. Search for those who have a specific specialty by entering the appropriate specialty under the **Search Options** heading. Click **Search**.
3. Search for someone with a specific name by entering the appropriate information in the fields for first and/or last name under the **Search Options** heading. Click **Search**.

4. When searching facilities, you can narrow the type of facility (e.g., hospital, nursing & custodial care facilities) by selecting a **facility type** from the dropdown menu beside the label **Type** that appears at the top of the main **Facility Database** display.

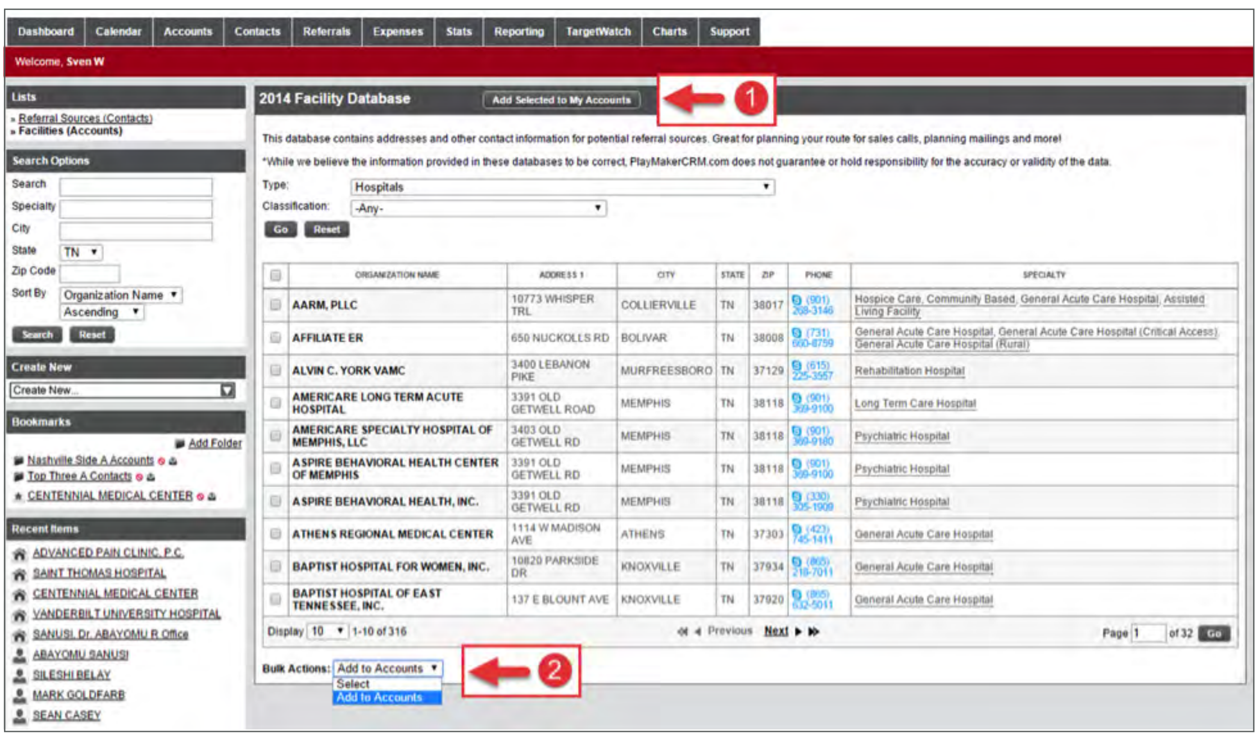


Select specific account types (Hospitals, SNFs, LTCs and more…)

You can easily add an individual or facility from the **Referral Source Database** to your book of business.

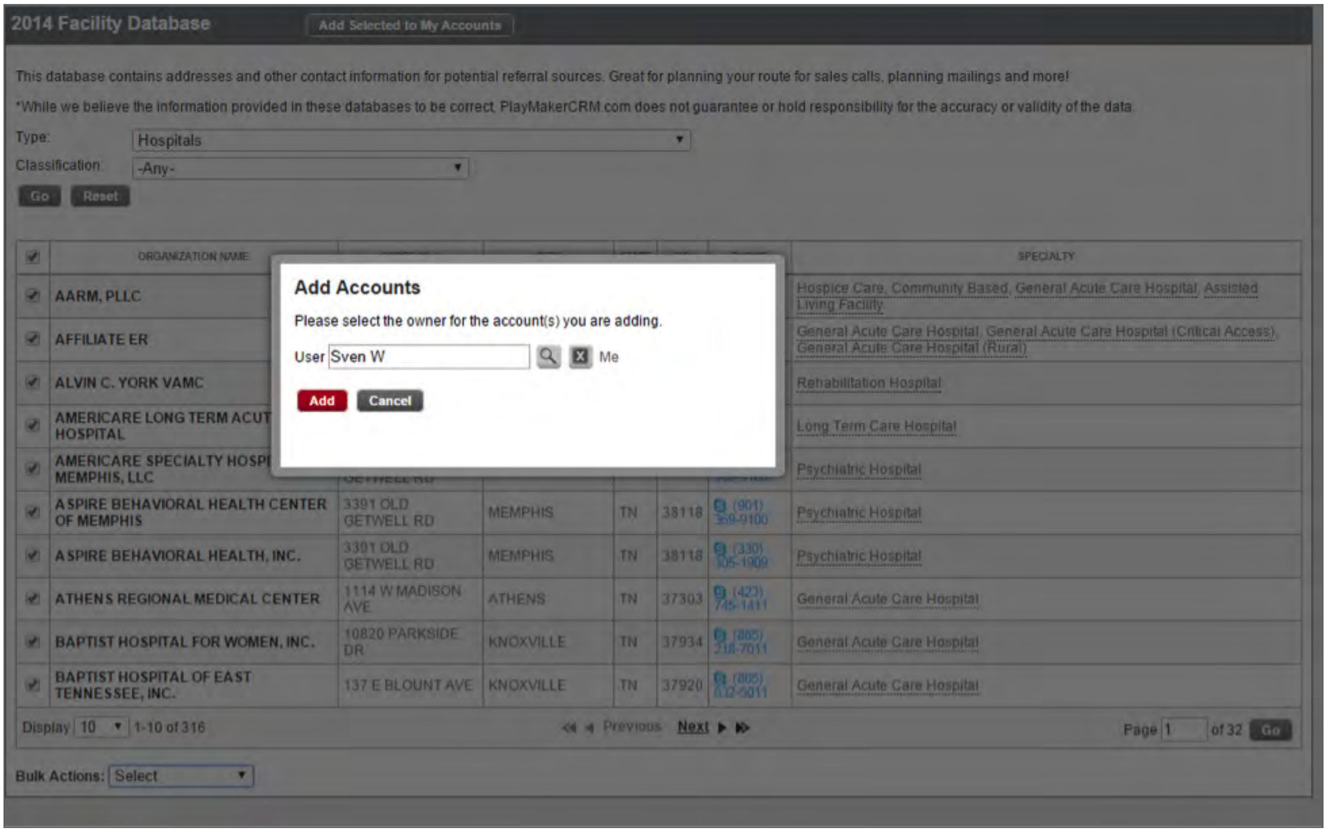
1. Click on the **check box** to the left of the desired person's/facility's name. To select all displayed entries at once, click on the **check box** that serves as a **column header** for the column of boxes.

2. Click the **Add Selected to My Contacts** button, which is located in the main black label bar that reads Referral Source Database.



There are two different ways to add accounts from the referral source database.

3. In the box that appears, click on the **User** field. This will take you to a new window in which you can select the name of the user to whom you would like to assign the contact/account. Click on the word **Select**, which is located under the **Actions** column heading on the far right of the employee listing.



> **REMEMBER:** Use the button to search for a user. Use the button to clear the current entry. To quickly select yourself as the assignee, just click the Me button.

4. Click **Add** in the new box that appears on the screen. An alert will appear that indicates the contact or account has been added successfully. Click **OK**.

5. The name of the contact/account you just added to a user's book of business has now disappeared from the Referral Source Database display. This prevents users from duplicating entries when using the database to add to their books of business.

> **REMEMBER:** By default, all physicians added through the Referral Source Database automatically tie in with physicians that exist in TargetWatch. This link is created by using the physicians NPI and prevents duplicates physician contacts from being created in PlayMaker. Existing contacts already in PlayMaker from other sources outside of the TargetWatch also follow the rules with matching NPI to prevent duplicates.

7. Accounts and Contacts Overview

When records have been added into PlayMaker you can review them in the Contacts and Accounts areas, both accessible by clicking on the appropriate tab in the main menu bar located just below the PlayMaker logo at the top of any page.

Accounts (Referring Facilities)

1. Click on the **Accounts** tab in the main menu bar. You will be taken to the **All Accounts** view, which allows you to see all of the facilities in PlayMaker, regardless of which user is assigned to them. The various account managers are listed in the far right column of the display.

2. Change your view to see only your accounts by clicking on the dropdown menu beside the **Change View** label in the main Accounts display. Choose **My Accounts**.

3. To locate a specific account, use the **Search Accounts** option, which is located on the left side of the screen beside the main Accounts display.

4. Click on the **text entry box** and type the account name. Click **Go**.

> **TIP:** Be aware that when using the **Search Accounts** option, the view you are in is important. The search function will only search within the designated view. If you are searching within **My Accounts** for a facility that is assigned to someone else, it will not be displayed unless you first change your view to **All Accounts**.

> **REMEMBER:** Change default to **My Accounts**. See the Custom Views section (page 52) to learn how to change the default view for home users to My Accounts. In addition, you may want to change the fields that are displayed in the My Accounts view.

Contacts (Referring Individuals)

1. Click on the **Contacts** tab in the main menu bar. You will be taken to the **All Contacts** view, which allows you to see all of the physicians and other individual referral sources in PlayMaker, regardless of which user is assigned to them. The various account managers are listed in the far right column of the display.

2. Change your view to see only your contacts by clicking on the dropdown menu beside the **Change View** label in the main **Contacts** display. Choose **My Contacts**.

3. To locate a specific contact, use the **Search Contacts** option, which is located on the left side of the screen beside the main Contacts display.

4. Click on the **text entry box** and type the contact's last name. Click **Go**.

> **TIP:** Be aware that when using the **Search Contacts** option, the view you are in is important. The search function will only search within the designated view. If you are searching within **My Contacts** for an account that is assigned to someone else, it will not be displayed unless you first change your view to **All Contacts**.

> **REMEMBER:** It's important to understand the various ways in which a contact can make its way into Play-Maker. There are currently four ways in which this can happen. **Method 1:** TargetWatch (Physicians tab); **Method 2:** Add from Referral Source Database (Contacts); **Method 3:** Integration; and **Method 4:** By an end-user.

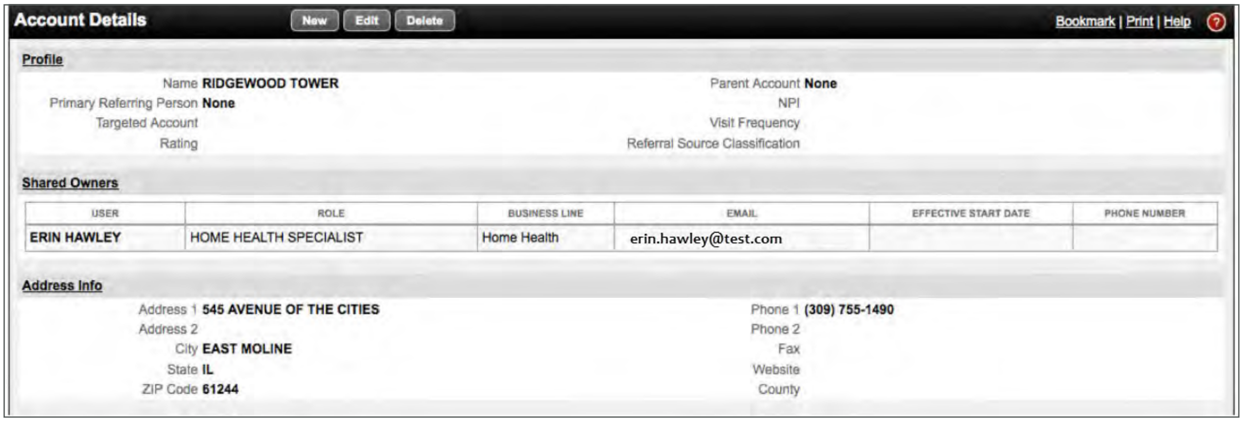
8. Accounts

View an account by clicking on the word **View** beside the name of the facility whose record you want to view in the main accounts display. View is located under the **Actions** column.

Account Details

This screen features information used in account tracking. The following information is included:

- ACCOUNTS: Profile Section



Account Details New Edit Delete Bookmark | Print | Help

Profile

Name	RIDGEWOOD TOWER	Parent Account	None
Primary Referring Person	None	NPI	
Targeted Account		Visit Frequency	
Rating		Referral Source Classification	

Shared Owners

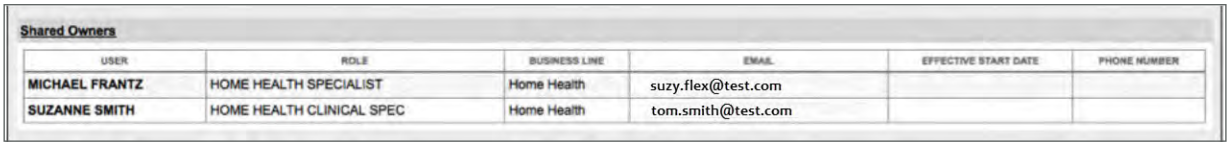
USER	ROLE	BUSINESS LINE	EMAIL	EFFECTIVE START DATE	PHONE NUMBER
ERIN HAWLEY	HOME HEALTH SPECIALIST	Home Health	erin.hawley@test.com		

Address Info

Address 1	545 AVENUE OF THE CITIES	Phone 1	(309) 755-1490
Address 2		Phone 2	
City	EAST MOLINE	Fax	
State	IL	Website	
ZIP Code	61244	County	

  - **Name:** Name of the account
  - **Targeted Account:** This is a manual field for determining whether an account is targeted (Yes/No).
  - **Parent account:** (Parent-child relationships indicate those accounts that are larger companies [parents] and their subordinate divisions [children] e.g., a hospital system and its several physician buildings). This allows more easily accessible granularity, rather than having a very large account with potentially hundreds of contacts. When applicable, link each account to a parent account. This creates more advanced reporting relationships for large accounts like Hospitals.
    - Examine the entire parent-child hierarchy by viewing the area located immediately below the main Account Details label. Like a family tree, the account parent, children and even grandchildren will be easily denoted by their position in the list.

- ACCOUNTS: Shared Account Owners Section: PlayMaker has the ability for multiple users to share ownership of a single referral source (Contact or Account).



Shared Owners

USER	ROLE	BUSINESS LINE	EMAIL	EFFECTIVE START DATE	PHONE NUMBER
MICHAEL FRANTZ	HOME HEALTH SPECIALIST	Home Health	suzy.flex@test.com		
SUZANNE SMITH	HOME HEALTH CLINICAL SPEC	Home Health	tom.smith@test.com		

  - **Primary referring person:** Link each referring facility or account with a primary referring person (Contact).
  - **NPI:** NPI of the account or facility.
  - **Visit frequency:** Set the frequency for which this account should be visited. (Weekly, Bi-Weekly, Monthly and Quarterly).
  - **Rating:** PlayMaker's built-in A, B, C and D rating.

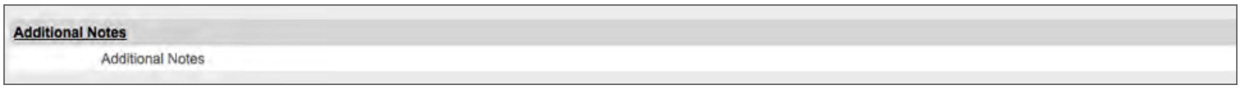
■ ACCOUNTS: Address Info Section

- Address, city, state and ZIP code
- Phone and fax numbers
- Website

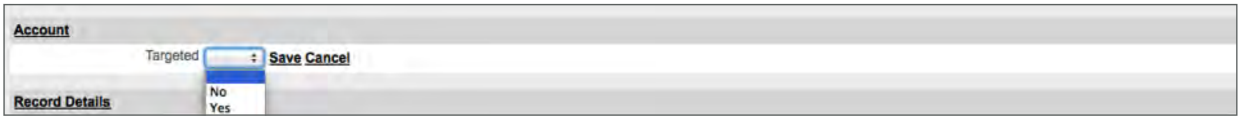
■ ACCOUNTS: Facility Info Section

- Primary facility category
- Facility number of beds
- Facility avg. daily census
- Facility yearly discharge
- # personnel
- # physicians in group: The number of physicians in the group or practice
- # patients per day: The estimated number of patients treated per day
- # Medicare patients per day: The estimated number of Medicare patients treated per day
- Hospital privileges
- Secondary facility categories

■ ACCOUNTS: Additional Notes Section



■ ACCOUNTS: Targeted Accounts Section



- This flag determines whether an account is currently targeted.

- ACCOUNTS: Record Details Section
  - This read-only section is typically used for administrators to diagnose and troubleshoot which data elements were received from your patient care system, if you chose to integrate with PlayMaker CRM. These read-only data fields typically should never me modified in PlayMaker and are using for advanced reporting and troubleshooting only.

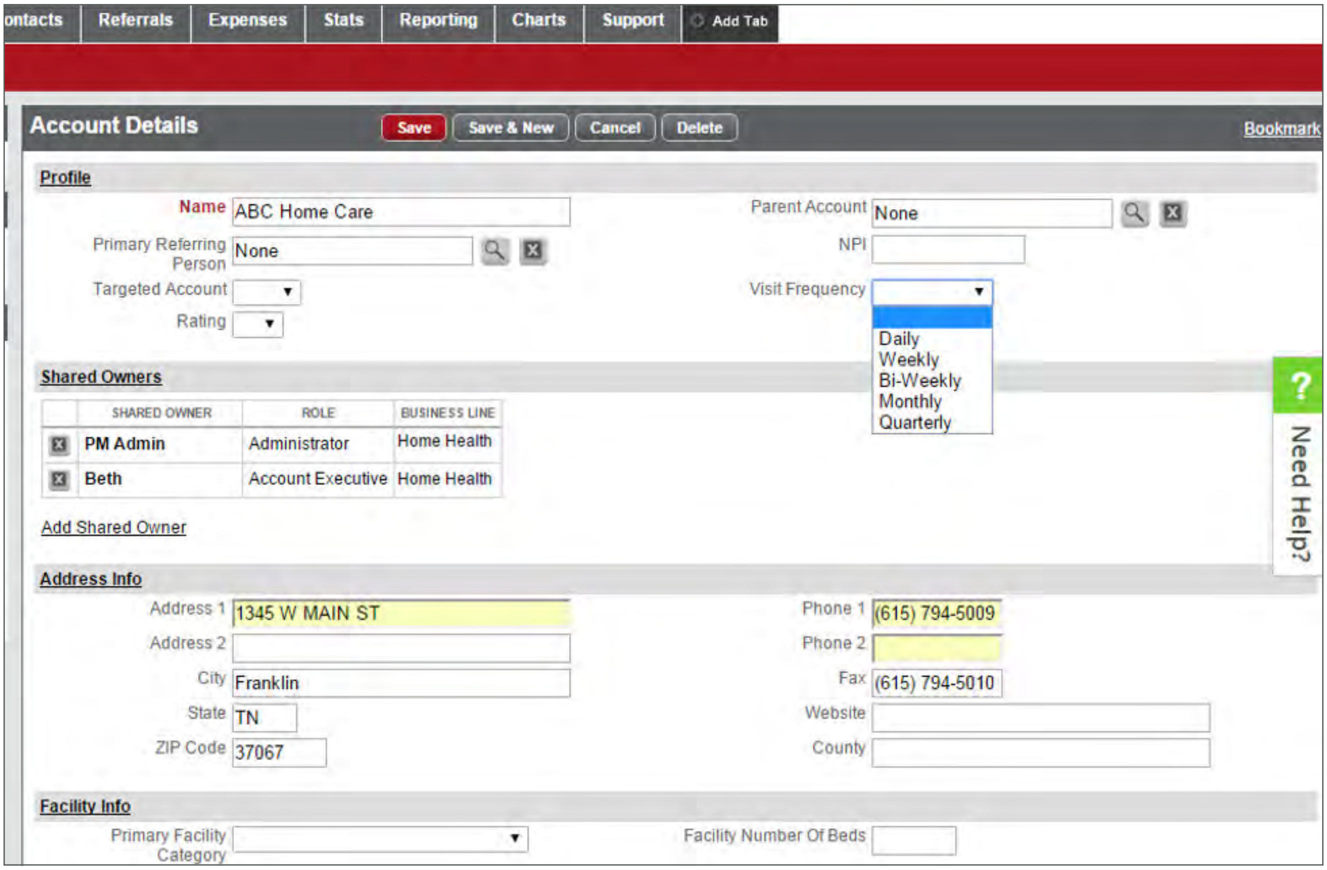
> **REMEMBER:** The record details section can be a valuable tool for troubleshooting how data makes it's way into Playmaker or what the original source data fields looked like in your patient care system, if you chose to integrate with PlayMaker CRM. In the example Record Details section below, you can see this account has a **Source** field of **Integration**.

Record Details

Id	499657	hms_poid_dl	
hms_npi_dl		NPPES_npi	
attention		provider_num	
npi_number		license_number	
department	302	system	
fax2		telephone2	
zip2		state2	
city2		mdoth2	
mdext2		license_state	
license_expiry	30	specialty	
specialty_code	SNR	branch_number	2083
emrid	20830000300302	master	
group_id		Added Date	09/28/2013
Source	Integration	Last Modified On	10/26/2013 02:33 PM
Last Modified By	None	Facility Type Code	F
tracking_guid			

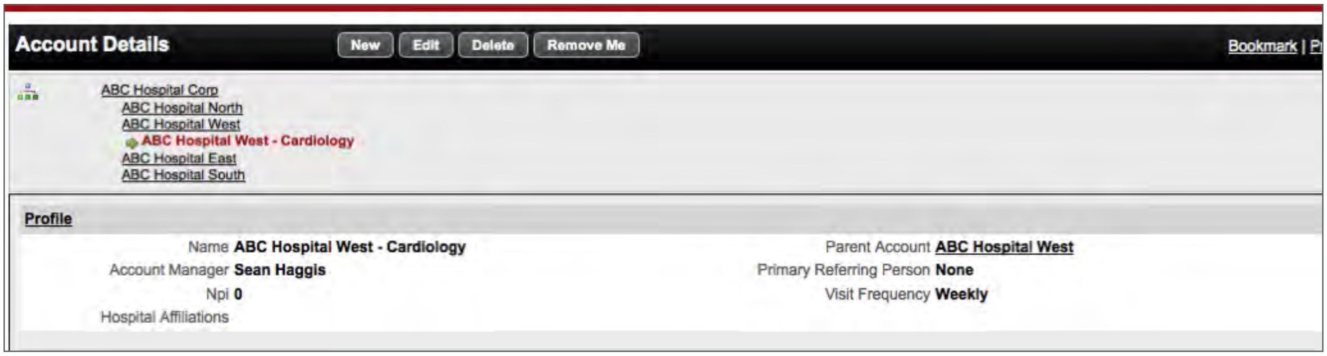
  - The source field is a good indicator of where the account came from. In this case, because this record has a source of Integration and a EMR ID we can assume that this record likely originated from Unity. The Facility Type Code of F is also important because it indicates to PlayMaker whether this is an account or a contact. It's important to keep in mind that records can be merged, so it would be possible for two records with differing sources to be merged. In that case, if the EMR ID field exists and the source was HMS or User, for example, that would be a clear indication that two records from differing sources were merged.
  - PlayMaker ID: Unique ID for each PlayMaker record
  - Added Date: The date the record was added to the system
  - Source: How was the record added to the system
  - Last modified date: When was the record last modified

> **REMEMBER:** Click on a field to edit. Under **Accounts** or **Contacts**, when the **View** option is selected you are still able to edit a field. **Left click on the field** that you would like to edit and make your changes. Click **Save**.



Editing Contact or Account Fields from the View

- **Parent/Child.** This feature is used to break a large Account into “Sub-Accounts,” or to roll several small Accounts into one entity. (e.g., A hospital can be broken down into the meaningful units that represent how your agency markets. Instead of one account representing ABC Hospital, you would create multiple accounts such as ABC Hospital 2E Oncology, ABC Hospital 4th Fl Cardiology, ABC Hospital ER, etc. The naming convention of the sub accounts provides a marketing roadmap and enables unique strategies for each department).



Viewing Parent Accounts

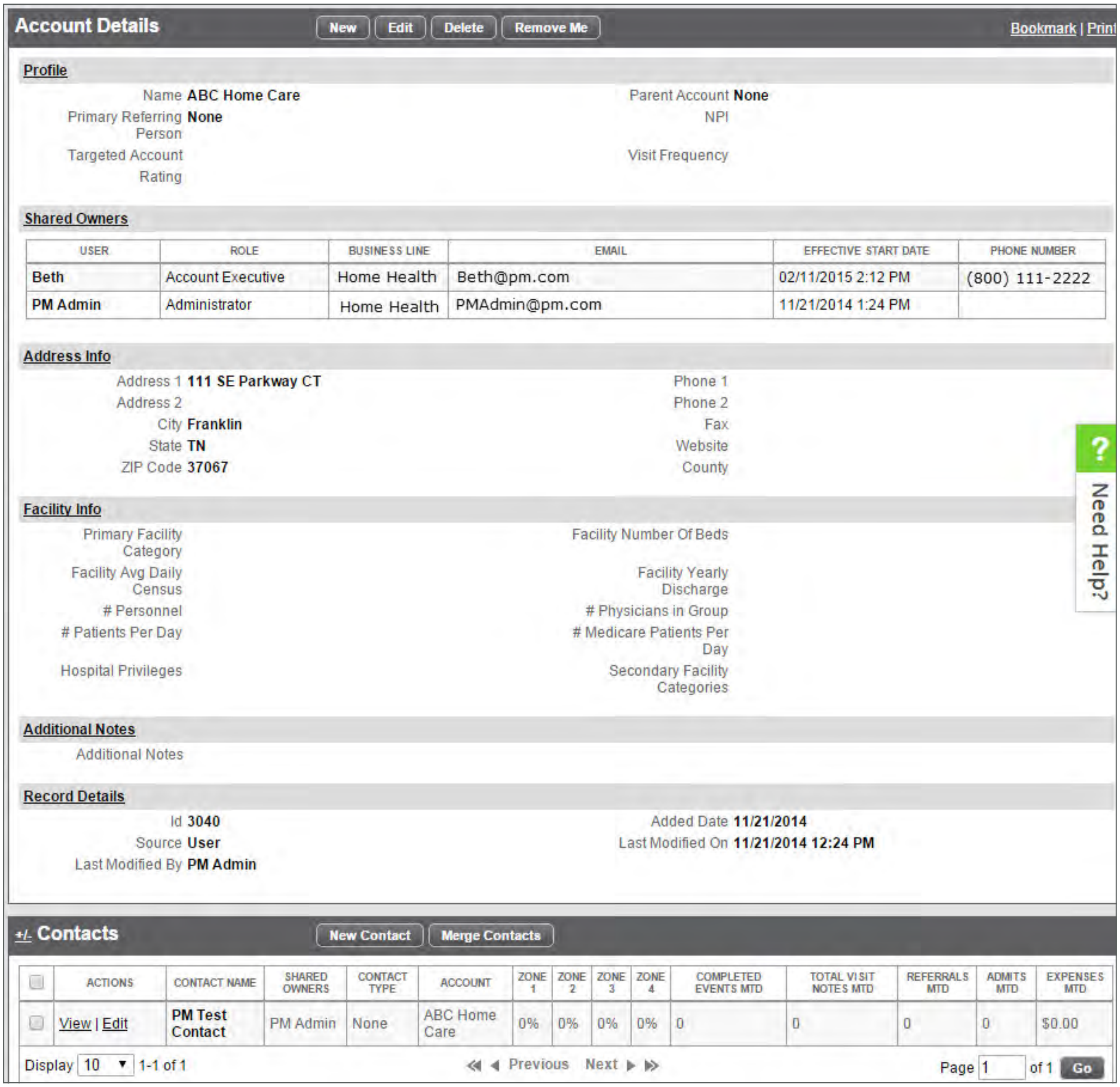
- To create a parent-child relationship, first create or identify the sub account. Under **Edit** mode, click in the **Parent Account** field, search for your desired Parent Account, Select the **Account**. Click **Save**.

REMEMBER: Prior to creating your sub accounts, draw the reporting hierarchy on a piece of paper. This will provide a model for you to create within PlayMaker CRM.

Contacts

Scroll below the main Account Details display to locate **Contacts**. The list displayed here is all those people associated to the selected facility.

REMEMBER: Click on each section header to collapse or expand the details for a cleaner looking account view. In the example below you can see that the following section headers have been minimized: Address Info, Facility Info, Additional Notes, Account and Record Details. By opening only the key sections you'd like to view you can quickly get to the information you need the most.


Account Details New | Edit | Delete | Remove Me — Bookmark | Print

Profile

Name **ABC Home Care** — Parent Account **None**
Primary Referring Person **None** — NPI
Targeted Account Rating — Visit Frequency

Shared Owners

USER	ROLE	BUSINESS LINE	EMAIL	EFFECTIVE START DATE	PHONE NUMBER
Beth	Account Executive	Home Health	Beth@pm.com	02/11/2015 2:12 PM	(800) 111-2222
PM Admin	Administrator	Home Health	PMAdmin@pm.com	11/21/2014 1:24 PM	

Address Info

Address 1 **111 SE Parkway CT** — Phone 1
Address 2 — Phone 2
City **Franklin** — Fax
State **TN** — Website
ZIP Code **37067** — County

Facility Info

Primary Facility Category — Facility Number Of Beds
Facility Avg Daily Census — Facility Yearly Discharge
Personnel — # Physicians in Group
Patients Per Day — # Medicare Patients Per Day
Hospital Privileges — Secondary Facility Categories

Additional Notes

Additional Notes

Record Details

Id **3040** — Added Date **11/21/2014**
Source **User** — Last Modified On **11/21/2014 12:24 PM**
Last Modified By **PM Admin**

+/- Contacts New Contact | Merge Contacts

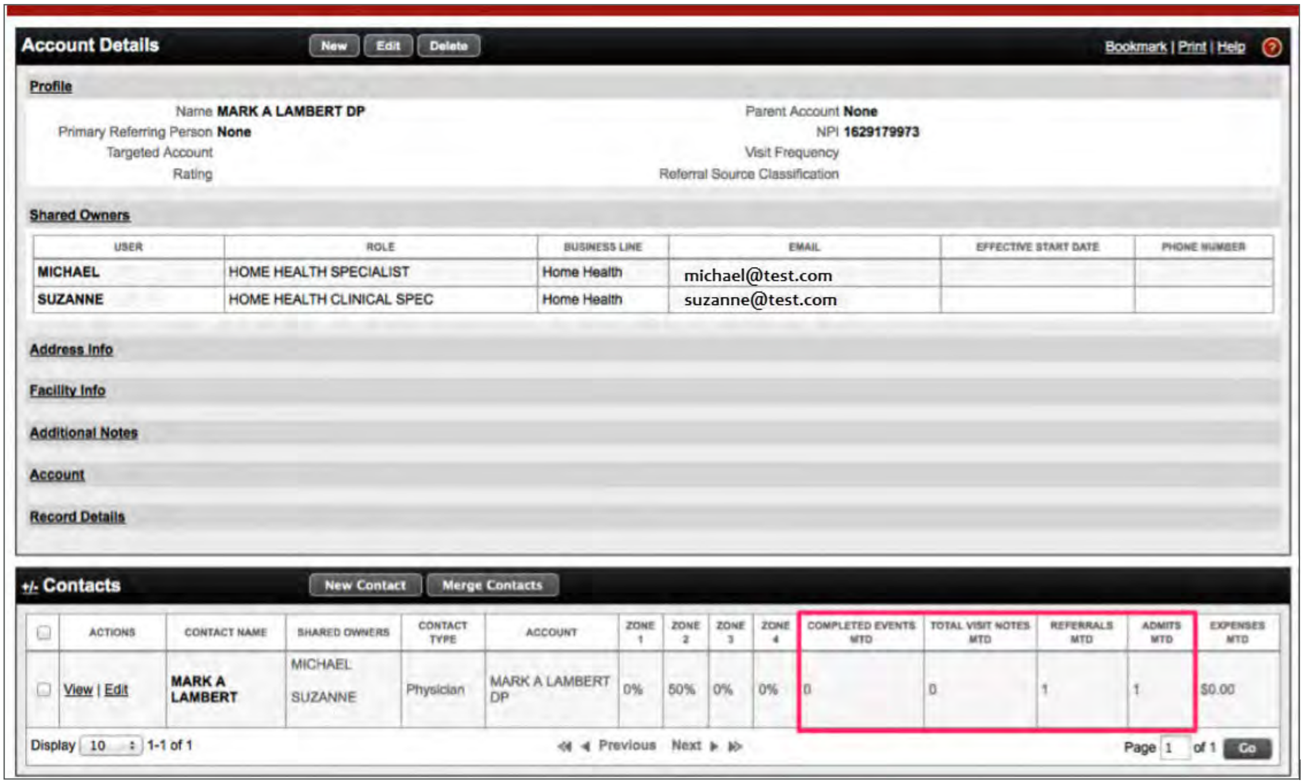
	ACTIONS	CONTACT NAME	SHARED OWNERS	CONTACT TYPE	ACCOUNT	ZONE 1	ZONE 2	ZONE 3	ZONE 4	COMPLETED EVENTS MTD	TOTAL VISIT NOTES MTD	REFERRALS MTD	ADMITS MTD	EXPENSES MTD
	View | Edit	PM Test Contact	PM Admin	None	ABC Home Care	0%	0%	0%	0%	0	0	0	0	$0.00

Display 10 1-1 of 1 — Previous Next — Page 1 of 1 Go

Related Contacts

- Available information includes the contact's name, contact manager (your agency user responsible for this individual), account association, sales zones, completed events month-to-date, total visit notes month-to-date, referrals and admissions month-to-date, and expenses month-to-date.

  These month-to-date (MTD) measurements allow users to conduct side-by-side comparisons of individual contacts who work at the same facility. This can show you who is providing the most referrals, how much has been spent on each individual, and how many referrals that person has sent to your agency.



Reviewing Associated Contact Referral and Sales Call Metrics

- When viewing contacts, you can see more detailed information about an individual by clicking on the word View located beside the person's name. This is on the far left side of the display under the Actions column.

Monthly Events

Scroll below the main Account Details display to locate **Monthly Events**. Events are the marketing activities that are scheduled through the use of PlayMaker's calendar. This view provides an at-a-glance tool to see all activities scheduled through the calendar for all individuals at this facility.

- Use the **date range finder** to focus on calendar activities that have been scheduled within a certain period of time. The finder is located on the right side of the black title bar labeled Monthly Events.
  - To change the dates, click in the first date range box and **select your preferred start date** from the resulting pop-up calendar. Do the same for the second box and indicate your **preferred end date**. Click **Go**.

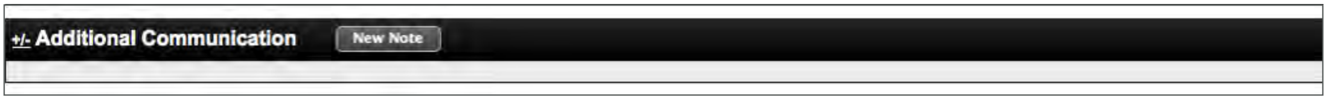
Referrals

Scroll below the Monthly Events display to reach the **Referrals** display. This will show the referrals that historically have been provided by all individuals under the selected account.

ACTIONS	SHARED OWNERS	PRIMARY PHYSICIAN	DATE ENTERED	INSURANCE TYPE	REFERRAL STATUS	SOC DATE	NON ADMIT DATE	PATIENT NAME	BUSINESS LINE
View | Edit	MICHAEL SUZANNE	MARK A LAMBERT	10/20/2013	Medicare	Admit	11/04/2013		Test patient	Home Health

Additional Communication

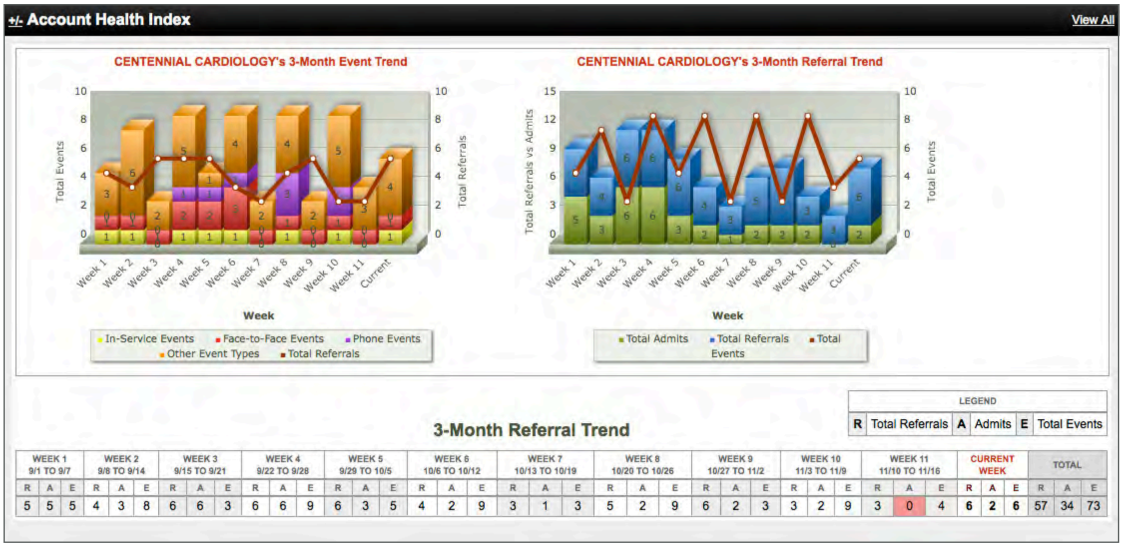
Scroll below the Referrals display to reach the **Additional Communication** display. Additional Communication allows users to add notes that don't qualify in information fields listed within the account profile.



Account Health Index

Scroll below the Referrals and Additional Communication displays to reach the **Account Health Index**. This graphic 12-week rolling display allows users to see an overview of the types of events this account most often participates in and the referrals and admissions people at the facility send your agency during the same time period.

With this side-by-side display, users can see at a glance which activities may be working well and which may not be working as well.



WEEK 1 9/1 TO 9/7			WEEK 2 9/8 TO 9/14			WEEK 3 9/15 TO 9/21			WEEK 4 9/22 TO 9/28			WEEK 5 9/29 TO 10/5			WEEK 6 10/6 TO 10/12			WEEK 7 10/13 TO 10/19			WEEK 8 10/20 TO 10/26			WEEK 9 10/27 TO 11/2			WEEK 10 11/3 TO 11/9			WEEK 11 11/10 TO 11/16			CURRENT WEEK			TOTAL		
R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E	R	A	E
5	5	5	4	3	8	6	6	3	6	6	9	6	3	5	4	2	9	3	1	3	5	2	9	6	2	3	3	2	9	3	0	4	6	2	6	57	34	73

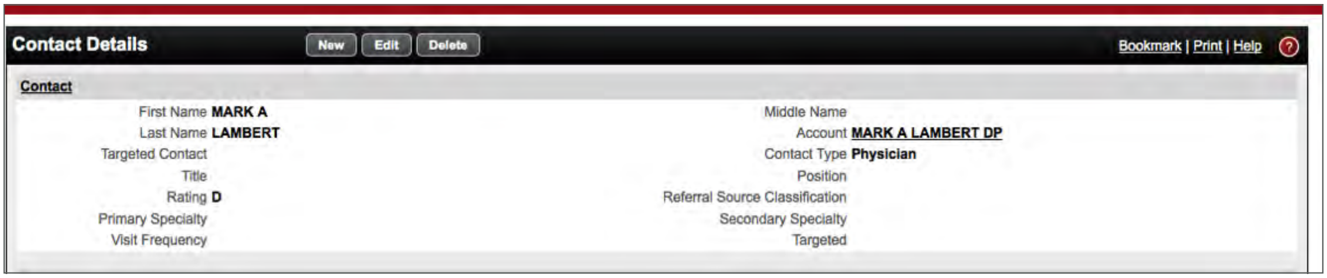
Account Health Indexes provide excellent transparency into sales events vs referral activity over time.

9. Contacts

View a contact by clicking on the word **View** beside the name of the individual whose record you want to view in the main contacts display. View is located under the **Actions** column.

Contact Details

This screen features information used in contact tracking. The following information is included:



- CONTACTS: Contact Section
  - First, middle and last name
  - Contact manager (The user currently assigned to the individual)
  - Account (Association, or the facility this individual is associated with)
  - How did you hear about us
  - Contact type (e.g., physician, discharge planner)
  - Title
  - Position
  - Rating (This is on an A-D scale and can be changed by clicking on the current rating and selecting a new one from the dropdown menu that appears. It also can be automatically calculated in PlayMaker)
  - Primary specialty
  - Secondary specialty
  - Visit frequency
  - Active? (Denotes whether the individual remains active)
- CONTACTS: Address Info Section
  - Address, city, state and ZIP code
  - Telephone numbers (Work, mobile, home, fax)
  - Email addresses
  - Office hours
  - Contact preference
  - Office hours and best time to visit
  - Website

- CONTACTS: Profile Section
  - NPI number
  - Birthday
  - Likes and dislikes
  - Assistant's name
  - Favorite food, entertainment and team
  - Ethnicity
  - Religion
  - Special Interests
  - Community involvement
- CONTACTS: Payor Mix Section
  - Potential referrals per month
  - Percent Medicare, Medicaid and private
  - Participating managed care orgs
- CONTACTS: Additional Notes Section
- CONTACTS: Record Details Section
  - PlayMaker ID
  - Source
  - Added date
  - Last modified date
  - Last Modified by
- CONTACTS: Contact Sharing Section

REMEMBER: Save valuable time by copying pertinent account details directly to an associated contact. When adding a contact to an account, users are presented with the option of copying the account details to the contact. If the account information has been added properly, this feature can save a great deal of time.

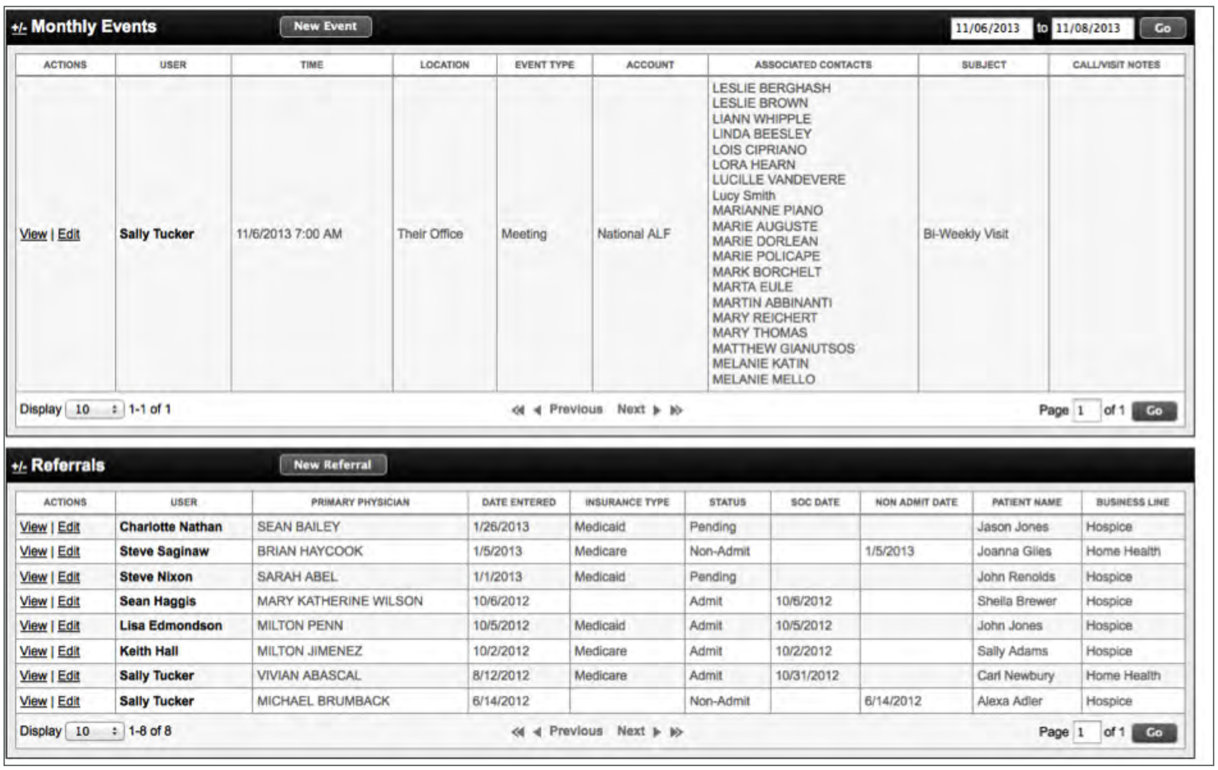
Be sure to add doctors by using only the **Referral Source Database** or **TargetWatch**. This ensures that you obtain the correct demographic information along with the physician's **NPI number**. The NPI is important for referral, expense, and event reporting.

Monthly Events

Scroll below the main Contact Details display to locate **Monthly Events**. Events are the marketing activities that are scheduled through the use of PlayMaker's calendar. This view provides an at-a-glance tool to see all activities scheduled through the calendar that a particular contact participates in.

- Use the **date range finder** to focus on calendar activities that have been scheduled within a certain period of time. The finder is located on the right side of the black title bar labeled Monthly Events.
  - To change the dates, click in the first date range box and **select your preferred start date** from the resulting pop-up calendar. Do the same for the second box and indicate your **preferred end date**. Click **Go**.

> **REMEMBER:** Full 360-degree referral source sales activity and referral visibility. The events located in this section represent all associated events for the agency. This section enables users to see one another's call notes, events, and referral activity.



+/- Monthly Events | New Event | 11/06/2013 to 11/08/2013 | Go

ACTIONS	USER	TIME	LOCATION	EVENT TYPE	ACCOUNT	ASSOCIATED CONTACTS	SUBJECT	CALL/VISIT NOTES
View | Edit	Sally Tucker	11/6/2013 7:00 AM	Their Office	Meeting	National ALF	LESLIE BERGHASH LESLIE BROWN LIANN WHIPPLE LINDA BEESLEY LOIS CIPRIANO LORA HEARN LUCILLE VANDEVERE Lucy Smith MARIANNE PIANO MARIE AUGUSTE MARIE DORLEAN MARIE POLICAPE MARK BORCHELT MARTA EULE MARTIN ABBINANTI MARY REICHERT MARY THOMAS MATTHEW GIANUTSOS MELANIE KATIN MELANIE MELLO	Bi-Weekly Visit	

Display 10 1-1 of 1 | Previous Next | Page 1 of 1 Go

+/- Referrals | New Referral

ACTIONS	USER	PRIMARY PHYSICIAN	DATE ENTERED	INSURANCE TYPE	STATUS	SOC DATE	NON ADMIT DATE	PATIENT NAME	BUSINESS LINE
View | Edit	Charlotte Nathan	SEAN BAILEY	1/26/2013	Medicaid	Pending			Jason Jones	Hospice
View | Edit	Steve Saginaw	BRIAN HAYCOOK	1/5/2013	Medicare	Non-Admit		1/5/2013	Joanna Giles	Home Health
View | Edit	Steve Nixon	SARAH ABEL	1/1/2013	Medicaid	Pending			John Renolds	Hospice
View | Edit	Sean Haggis	MARY KATHERINE WILSON	10/6/2012		Admit	10/6/2012		Sheila Brewer	Hospice
View | Edit	Lisa Edmondson	MILTON PENN	10/5/2012	Medicaid	Admit	10/5/2012		John Jones	Hospice
View | Edit	Keith Hall	MILTON JIMENEZ	10/2/2012	Medicare	Admit	10/2/2012		Sally Adams	Hospice
View | Edit	Sally Tucker	VIVIAN ABASCAL	8/12/2012	Medicare	Admit	10/31/2012		Carl Newbury	Home Health
View | Edit	Sally Tucker	MICHAEL BRUMBACK	6/14/2012		Non-Admit		6/14/2012	Alexa Adler	Hospice

Display 10 1-8 of 8 | Previous Next | Page 1 of 1 Go

Contact Details: 360-degree view of sales events and referrals for a specific physician

Referrals

Scroll below the Monthly Events display to reach the **Referrals** display. This will show the referrals that the selected contact has provided historically.

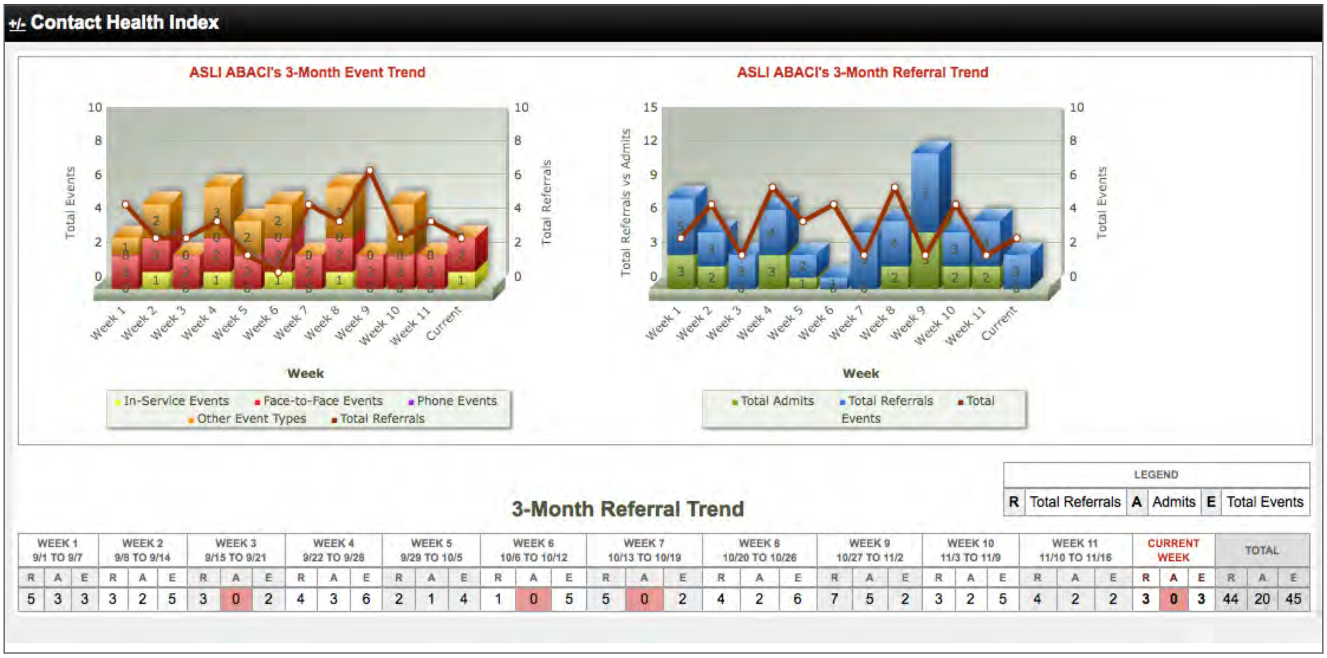
Additional Communication

Scroll down to reach the **Additional Communication** display. Additional Communication allows users to add notes that don't qualify in information fields listed within the contact profile.

Contact Health Index

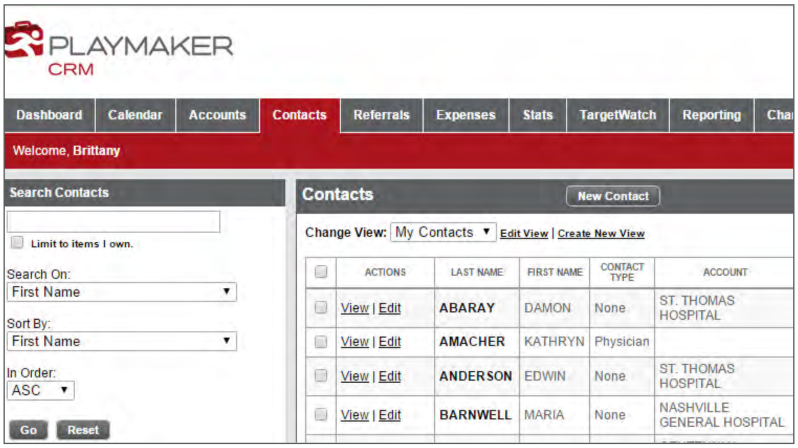
Scroll below the Referrals and Additional Communication to reach the **Contact Health Index**. This graphic 12-week rolling display allows users to see an overview of the types of events this contact most often participates in and the referrals and admissions the individual sends the agency during the same time period.

Users can see at a glance which activities may be working well and which may not be working as well with this side-by-side display.



Contact Health Index: View a rolling 3-month event and referral trend per contact.

10. Search Function



PlayMaker's search function is an easy way to find your contacts or accounts.

- The **Search Contacts/Search Accounts** function is located on the left side of the page under the red welcome bar when you click on either the **Accounts** or **Contacts** tab in PlayMaker's main menu bar.
- Searches are not limited to name. You may search for any criteria you like, such as city, simply by typing in the desired city name. Click **Go**.

  TIP: Searching for a term like Dallas may yield results that include people located in the city of Dallas, those located on a street named Dallas, or those people named Dallas.

- If the results you receive are not as refined as you would like, again go to the **Search Contacts/Search Accounts** area on the left side of the screen displaying your results and select the field to search on.
  - Using the dropdown menu for **Search On**, select the criteria you are searching for, such as city. Click **Go**.

11. Account/Contact Association

Once you have a clear understanding of both contacts and accounts in your PlayMaker book of business, be sure to associate each contact with an account so that they will be linked together in the system.

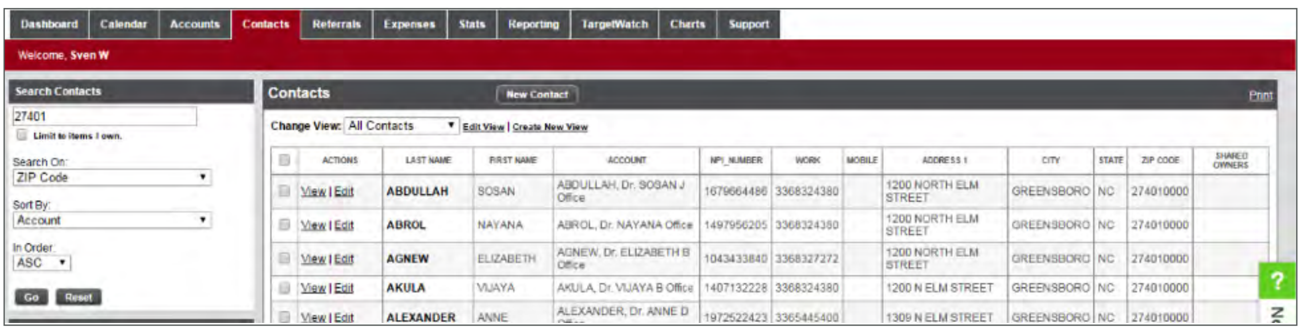
IMPORTANT: These associations are important because they will facilitate the management of your book of business and create more effective use of the calendar and other aspects of PlayMaker CRM.

REMEMBER: In a scenario in which you have an account with 10 associated contacts, having each contact linked to the correct parent account makes attaching all 10 contacts to an Event or Expense a single-click action instead of requiring you to search for each one, which can be time consuming.

- Identify local contacts that have not been associated with accounts.

  1. Click on the **Contacts** tab in PlayMaker's main menu bar.

  2. Enter your **city name, ZIP code** or other **geographic identifier** into the text entry box under the **Search Contacts** bar located on the left side of the page. Click **Go**.



  3. Refine your search by again going to the Search Contacts area and selecting the field to search on. **Select the appropriate field** from the dropdown menu (e.g., city, ZIP code). Click **Go**.

- You can easily see which contacts have no association by looking at the Account column of the resulting display. This field will be blank for those that have no account associations. Those that are associated with accounts will list the Account name in this field.

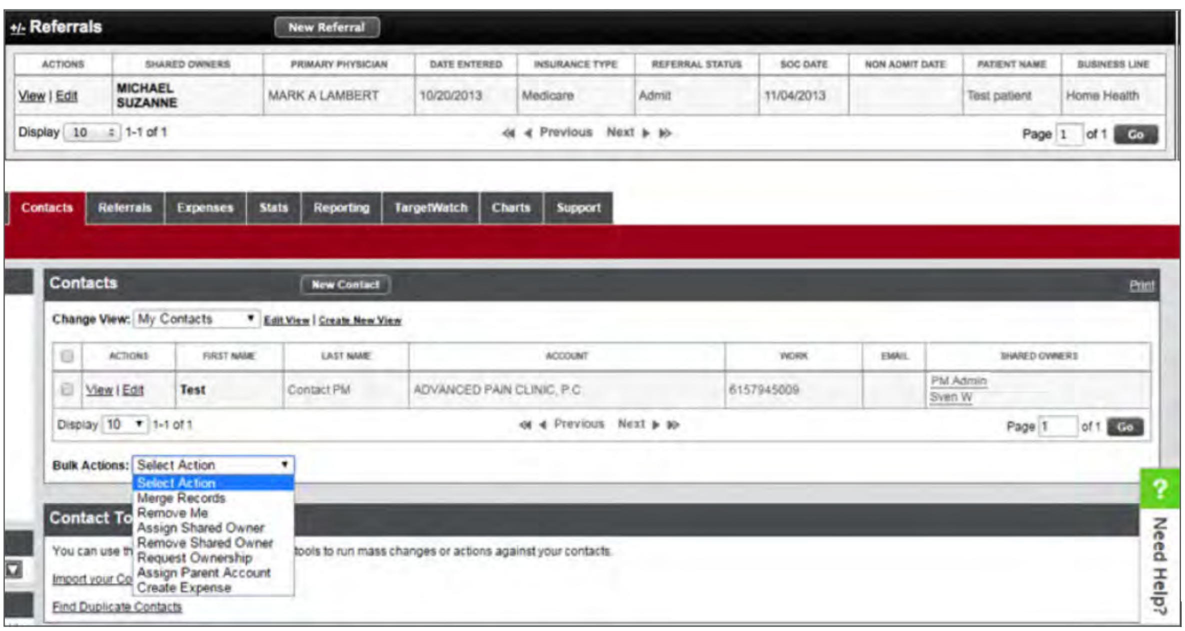
REMEMBER: See the Custom Views section (page 52) to learn how to change the default view.

Associating Accounts

Associating contacts to accounts is a critical task in PlayMaker. From an end-users perspective, everything becomes faster and easier once this task has been successfully accomplished. To assign one or more contacts to one account, you may want to first sort your data to easily identify multiple people who work at the same facility.

1. On the page displaying your list of contacts, change your sorting preference by clicking on the dropdown menu for **Sort By**, which is located under the **Search Contacts** bar on the left side of the page. Choose **Address 1**. Click **Go**.
2. In the results displayed, identify any contacts with the same address and same phone number, indicating they likely work at the same facility.
3. To associate multiple contacts (people) to the same account (facility), click on the **check boxes** located to the far left of their names in the Contacts display.
4. Scroll to the bottom of the display. Using the dropdown menu beside Bulk Actions, select **Assign Parent Account**.
5. In the Parent Account window that appears, click in the **text entry box**.
6. Refine the resulting account choices by entering a **city** or **ZIP code** into the **Find an Account** field and **All Employees** in the **Account Manager** field. Click **Search**. You also can simply scroll through the resulting list of accounts to locate the desired account.
7. Choose the account to associate with these contacts by clicking the word **Select**, located to the right of the desired account and under the **Actions** column heading.
8. Click the **Save** button on the Parent Account window that appears.

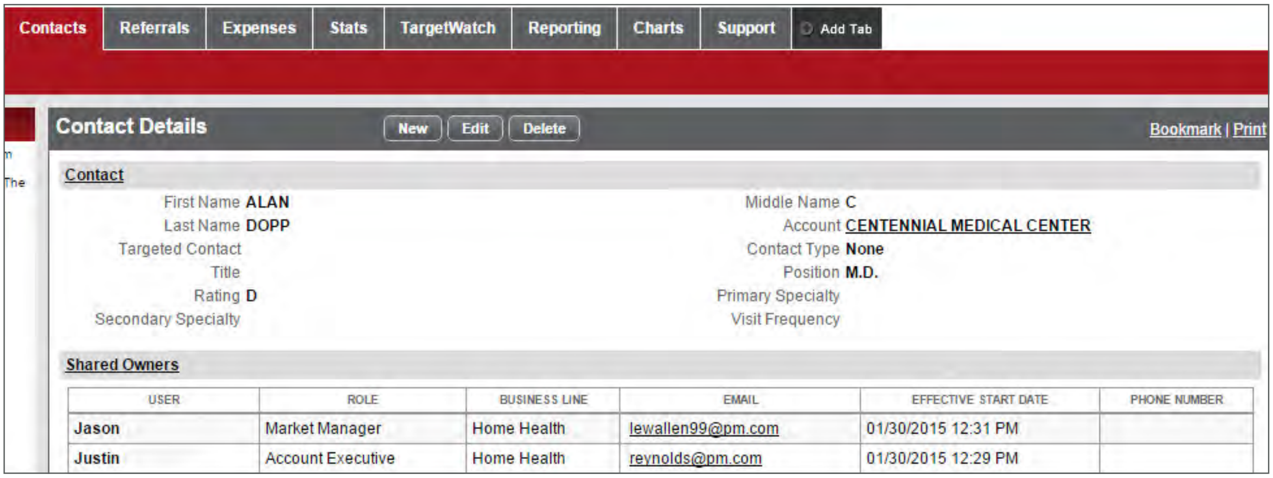
- To confirm the successful association, scroll down the resulting list of contacts until you reach the desired people and confirm the account you selected now appears in the **Account** field.



Assigning multiple contacts to the one parent account.

12. Shared Owners for Accounts and Contacts

There may be times when you share a referral source (accounts and contacts) with another user. When this is the case, you will be assigned shared ownership of the contact or account.



Individual Account/Contact Sharing

1. To assign one user to one account/contact, click on the word **Edit** located to the left of the name of the account/contact you wish to assign shared ownership. You'll notice that each user's role is displayed to the right of their name. It is very helpful to determine the roles or titles of each user.

2. In the resulting **Contact Details** display, scroll down to **Shared Owners**. Click on **Add Shared Owner**.

3. In the display **Find Users** window, search for the user you'd like to assign as a shared owner.

4. Scroll through the resulting list of users and choose the user to associate with this contact/account by clicking on the check box to the left of the person's name and clicking **Attach Selected Records**.

5. To confirm the successful account/contact sharing, scroll to the bottom of the Contact Details display to **Shared Owners**. The user's name will be displayed in this area.

Multiple Account/Contact Sharing

The following steps are for users that have manager access and above. Sales representatives must use the **Advanced AE Summary Report**, available within the **Reports** section of PlayMaker (See page 66).

1. To assign users to multiple contacts/accounts, click on the **check boxes** located to the far left of their names in the **Contacts/Accounts** display.

2. Scroll to the bottom of the display. Using the dropdown menu beside **Bulk Actions**, select **Assign Shared Owners**.

3. In the **Assign Shared Owner** window that appears, click in the **text entry box**.
4. Scroll through the resulting list to locate the desired user. Select the user by clicking the word **Select** located to the right of the person's name and under the **Actions** column heading.
5. Click **Save** on the **Assign Shared Owner** window that appears.
6. To confirm the successful sharing, re-open the record by clicking on **View** next to the name and review the list of shared owners just above the **Events** section. If a name needs to be removed from this list, simply click on the name and confirm that the name should be removed from sharing permissions.

13. Duplicate Accounts and Contacts

Although safeguards are in place to prevent duplicate account and contact creations, they occasionally will appear in the PlayMaker system, particularly when users create new entries from scratch. For optimal ease of use and for more meaningful reporting metrics, it's important to merge these duplicates together.

WARNING: Simply deleting a record when a duplicate is found could inadvertently cause the loss of important information and is not recommended.

There are two best practice methods for identifying and merging duplicates in PlayMaker.

Method 1: Visualization

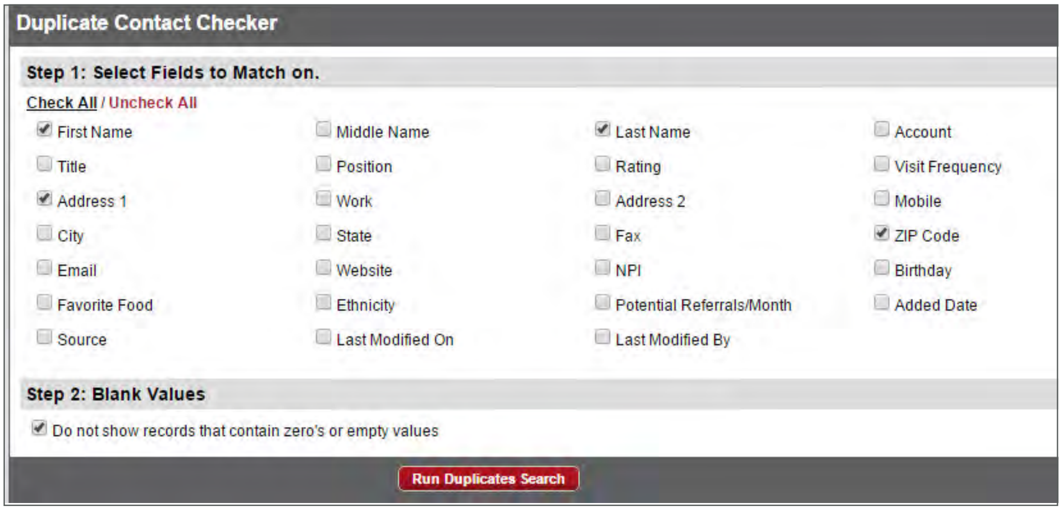
PlayMaker's built in contact and account views can be powerful allies when looking to identify and correct data issues.

1. First determine whether you'd like to identify duplicate contacts or accounts.
2. Next, click the **Contacts** or **Accounts** tabs in the main PlayMaker menu bar for the appropriate data you would like to search in.
3. On the page displaying your list of contacts or accounts, change your sorting preference by clicking on the dropdown menu for **Sort By**, which is located under the **Search Contacts** bar on the left side of the page. Choose **Last Name** for contacts or **Name** for accounts. Click **Go**.
4. Scroll through the list of names to look for entries that may be duplicates.
5. Click on the **check boxes** to the far left of the duplicate contact/account names. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select **Merge Records**.
6. In the **Merge Tool** display, the selected contacts/accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green. Only information highlighted in green will appear in the final merged record.
7. Click on the **Merge** button, located at both the top and bottom of the **Merge Tool** display.
8. A notification stating **Merge successfully completed** will appear on your screen. You also have the option here to view the newly merged record or return to the main results display by returning to the previous page.

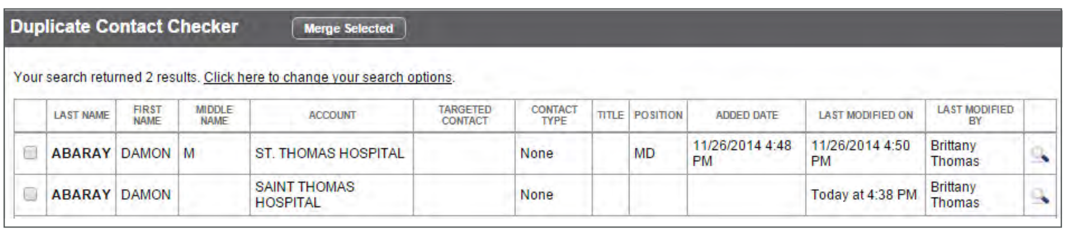
Method 2: Using the Find Duplicate Contacts or Accounts Tool

1. Click on the **Contacts** or **Accounts** tabs in the main PlayMaker menu bar for the appropriate data you would like to search in.
2. On the page displaying your list of contacts or accounts, scroll to the bottom of the display. In the area labeled **Contact** (or **Account**) **Tools**, click on the **Find Duplicate Contacts** (or **Accounts**).

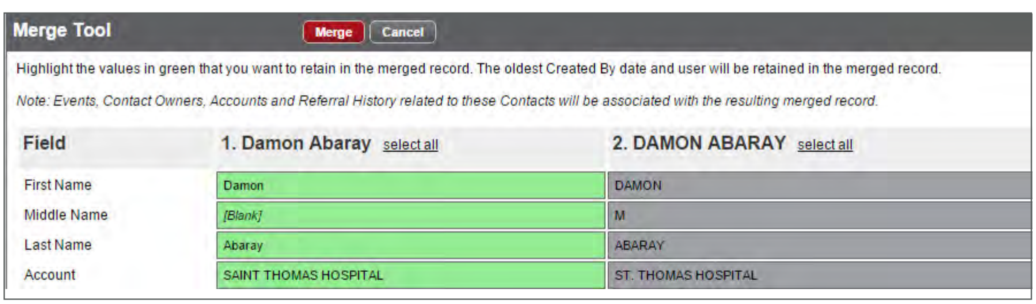
3. In the **Duplicate Contact Checker** window that appears, select the fields you would like searched for matches. It is a good idea to select both **First Name** and **Last Name** for an initial check. Other helpful fields for further refining may include **Address 1** and **ZIP code**. Click **Run Duplicates Search**, located at the bottom of the window.



4. Click on the **check boxes** to the far left of the duplicate contact/account names. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select **Merge**.



5. In the **Merge Tool** display, the selected contacts/accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green. Only information highlighted in green will appear in the final merged record.



6. Click on the **Merge** button, located at both the top and bottom of the **Merge Tool** display.

7. A notification stating **Merge successfully completed** will appear on your screen. You also have the option here to view the newly merged record. Any remaining duplicates that resulted from your previous search still will be displayed in this area.

REMEMBER: Always merge accounts (facilities) before you merge contacts (individuals).

Merge accounts using the following guidelines:

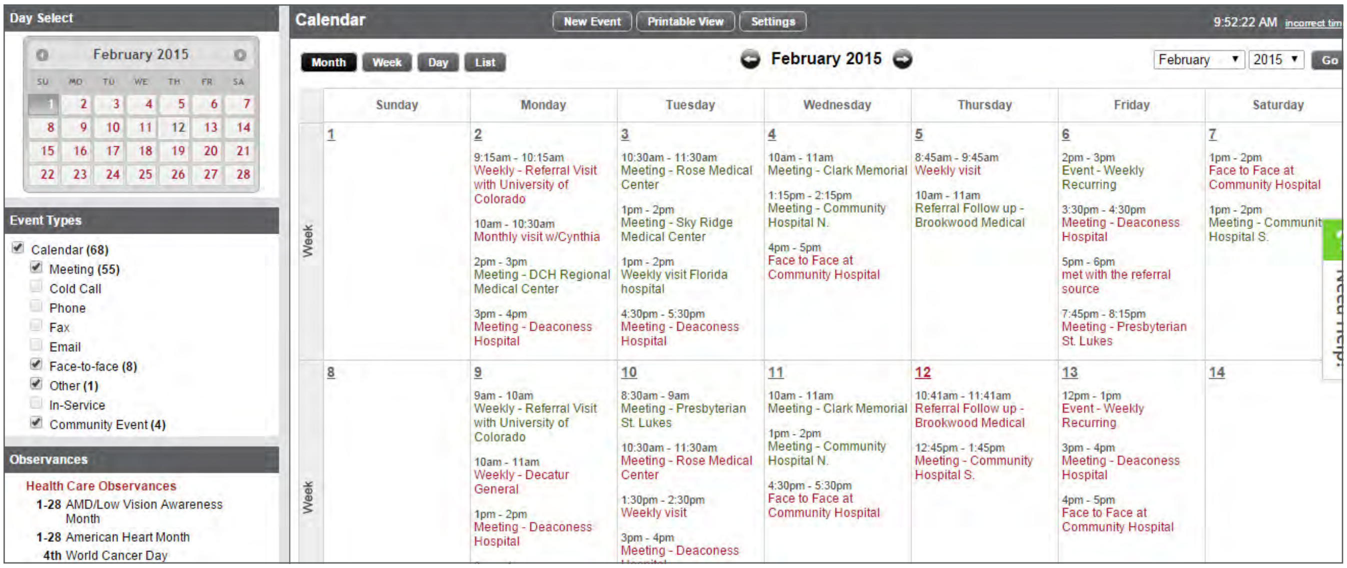
1. Name, Address 1, Address 2, and Phone 1
2. Name and Phone 1
3. Address 1, Address 2, and Phone 1
4. Name

Merge contacts

5. All duplicate NPIs
6. First Name, Last Name, Account

14. Calendar

The calendar is an important tool for managing your book of business by scheduling and tracking activities.



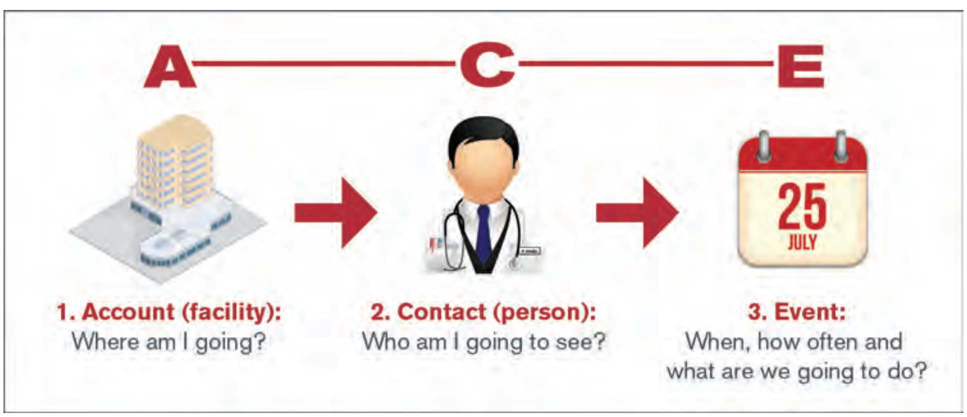
Overview

Click on the **Calendar** tab in the main PlayMaker menu bar to reach the calendar display.

- Planned events in the calendar are color coded. Those in **red** indicate those that have not been completed. Those in **green** indicate those that have been completed.
- Hover your mouse over an activity to see a pop-up window that provides a preview of each activity.

Event Scheduling: ACE Methodology

ACE, or **Account, Contact, Event,** is the streamlined method PlayMaker has developed for easy and complete event scheduling within the calendar. As you schedule events, you should ask yourself these questions in this order:



- **Account**

   1. Determine the account (facility) you would like associated with this event.
   2. Click on the **Accounts** tab in the main PlayMaker menu bar.

3. On the left side of the screen under the **Search Accounts** display, click in the **text entry box a**nd enter the name of the account. Click **Go**.

4. Locate the appropriate account in the Accounts display that appears on your screen. Click on **View**, which is located to the left of the account name under the **Actions** column heading.

   TIP: If the account is not displayed, it may not yet be in PlayMaker. Follow the instructions for bringing an account into PlayMaker from **TargetWatch** (See page 17) or the **Referral Source Database** (See page 23).

> **REMEMBER:** Accounts can be updated en masse using the Mass Update tool within Bulk Actions. After selecting the records you wish to update, under **Bulk Actions**, choose **Mass Update** and check all of the fields that need to be changed. It's important to remember that users can only mass update accounts they own.
>
> Changes made using bulk action tools are uniform across all of the selected records and cannot be undone.

- Ensure the **Visit Frequency** is accurate. This is located under the **Profile** portion of **Account Details**. You can change this to daily, weekly, bi-weekly, monthly, quarterly or another interval.

- Verify the **account's rating** is accurate. This is located under the **Profile** portion of **Account Details**. You can click on the value to change the rating to A, B, C, or D.

Contact

1. Scroll down past the Account Details display to the **Contacts** display. View the entries to ensure everyone you intend to meet with has been entered into PlayMaker.

2. If a contact is missing from the display, click on **New Contact**, which is located in the black **Contacts** label bar, and enter in the individual's information.

> **REMEMBER:** Since it is a common practice in the healthcare industry to wear name tags that display the first name only, last names are often unknown. In that case, use their position as the last name (e.g., Bob Nurse, Sarah Receptionist, etc.).

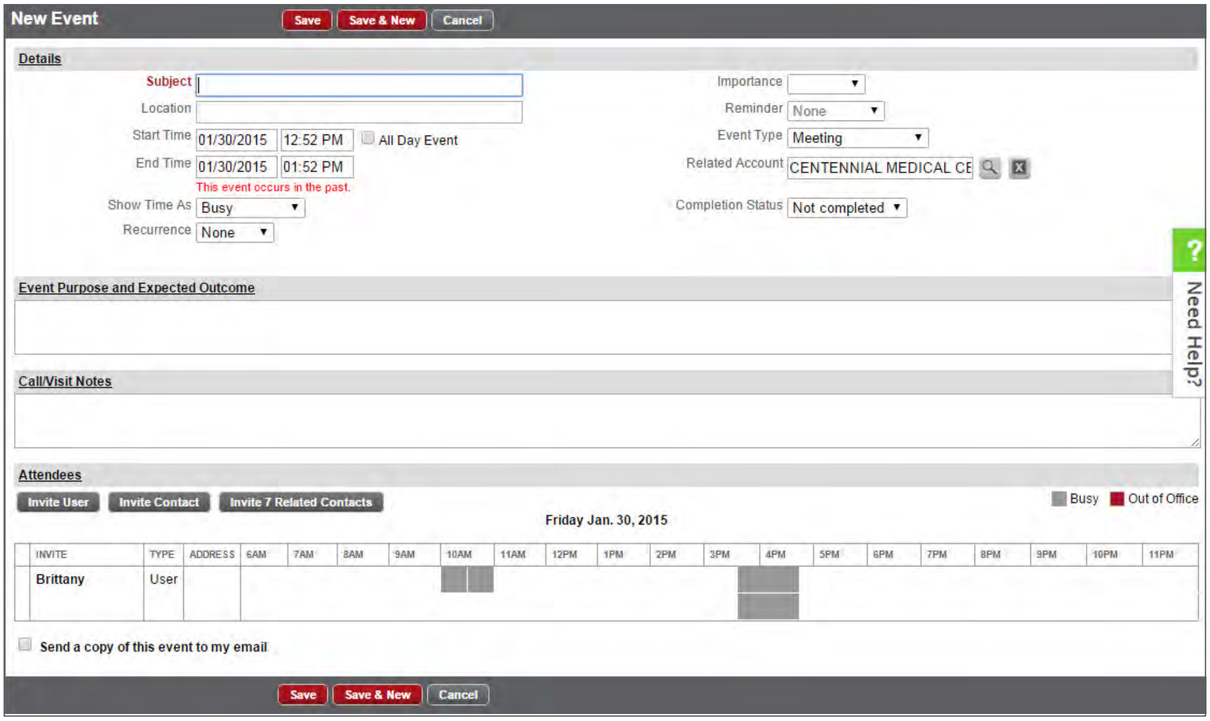
> **REMEMBER:** When adding a Contact to an Account, click the **Add Account Details** option.

Event

- Scroll down past the Contacts display to view all monthly events scheduled for the selected account, regardless of the scheduler. This information is visible to all users in PlayMaker.

Schedule an Event

1. Click on **New Event** located in the gray **Monthly Events** label bar.



2. In the **Details** section that appears, enter a descriptive **Subject** of the sales event or activity. Keep in mind that this subject will be displayed on your calendar as the main descriptor, so be sure to make it meaningful.

REMEMBER: Best practice for subject lines is avoiding those that simply state “Meeting.” Instead, opt for those that begin with the account name and follow it with the frequency of the visit (e.g., Subject: ABC Hospital - Bi-Weekly)

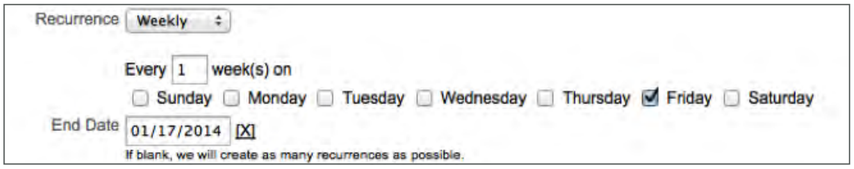
3. Add in other relevant details, such as **Location** (only if different from Account Address), **Importance**, and **Event Type**.

4. Set the event date and time by clicking in the **Start Time** text entry box and selecting the appropriate date. Click in the time box beside this to type in the appropriate time.

   - After setting a time, the end time displayed automatically changes in accordance with your predetermined default values. You can manually change the end time by clicking in the time box and typing a different time.

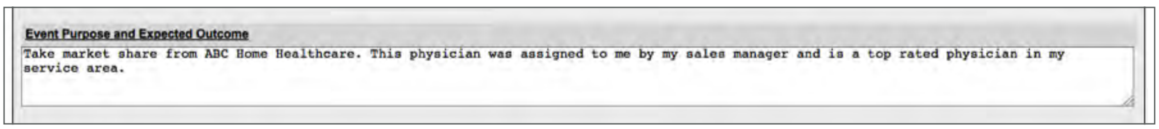
REMEMBER: Do not get caught up on the time of each event unless you know it. Your primary concern when first scheduling is the order of all scheduled events. The time can easily be adjusted at a later date or even while your waiting in the physician’s office using the Mobile App for iOS (iPhone and iPad).

5. If this will be a recurring event, indicate the frequency of recurrence in the **Recurrence** field by selecting a **time period** from the dropdown menu.



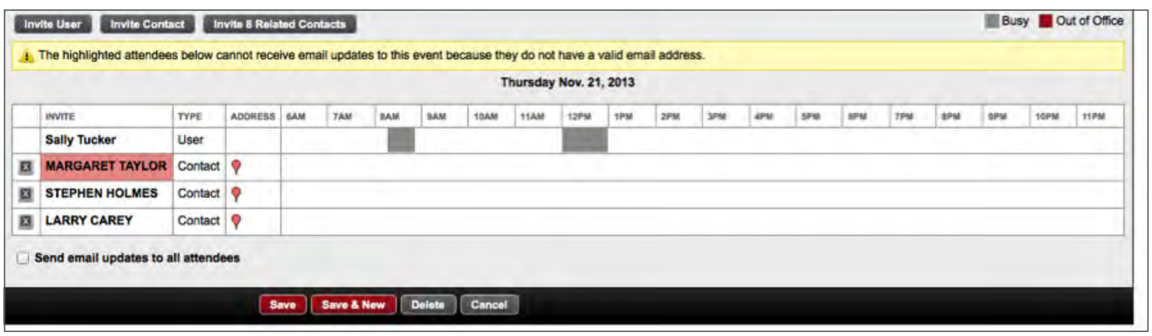
- Indicating that an event will be a recurring event will allow PlayMaker to schedule it automatically.
- If setting an event as a recurring event (e.g., every other week, multi days), you can choose to set a date that the recurring event will expire. Do this by clicking on the **End Date** text entry box and selecting the desired date. The default end date is three months after the first scheduled event.

6. Below the Details display is a box labeled **Event Purpose and Expected Outcome**. Click inside this box to enter a brief description of what you plan to do with this visit, or your current goal (e.g., Bi-weekly meeting to discuss our CHF program, medication monitoring and readmissions).



7. Scroll down past Event Purpose and Expected Outcomes to the **Attendees** display. PlayMaker works from the premise that activities will take place with contacts. Attempting to save an event without inviting anybody will result in an error because PlayMaker interprets that as you meeting with yourself.

8. Click on **Invite (#) Related Contacts**, which is located just below the **Attendees** label. All contacts associated to that account will then be displayed.



REMEMBER: To exclude or remove any related contacts from the event, simply click on the **X** that appears immediately to the left of the person's name.

TIP: Contacts that are added to the account in the future will appear here and can be included in future events.

- To add contacts to the event that are not related to the **Account** (facility), click on **Invite contact**, which is located just below the Attendees label and to the left of the Invite (#) Related Contacts button. From here, the user can search for contact(s) that they wish to add using the **Find a Contact** search window. Simply **select the contact(s)** by checking the box to the left of their name(s) and click **Attach Selected Results** above the list to add them to the event.

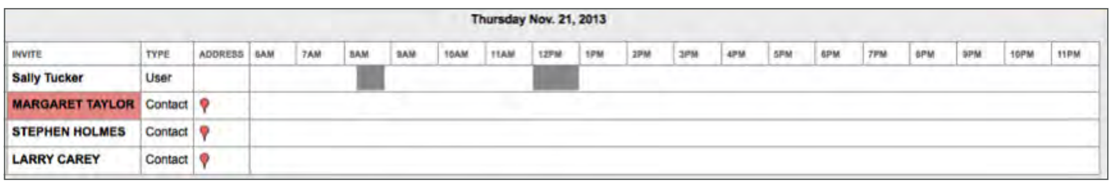
> **REMEMBER:** When adding new contacts to an event, be aware of whether you want to make them participants for only one or all future events.

9. To add other users from your agency to the event, click on **Invite User**, which is located just below the Attendees label and to the left of the Invite Contact button.

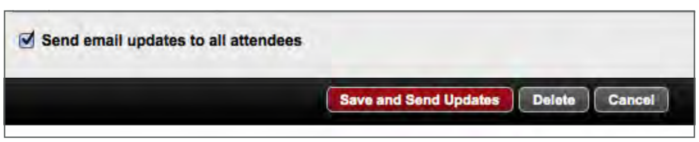
   - Click on the **check box** to the left of the desired users' names. Then click **Attach Selected Results**, located near the top of the **Search Results** display.

10. When you return to the Attendees display, you can easily see whether the meeting overlaps with any other events for all attendees by viewing the shaded areas on the timeline just to the right of the attendees' names.

   - To see details about other scheduled events, click on a shaded event for a summary.



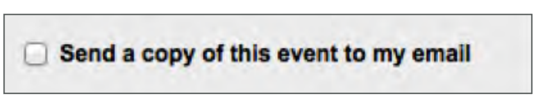
   - You can notify all attendees about the meeting via email by clicking on the box beside **Send email updates to all attendees**, which is located just below the attendees display.



   - Valid attendee email addresses must be entered into PlayMaker in order to for them to receive the update.

   - Attendees without valid email addresses will be highlighted in **red**.

11. Send a copy of the event to your own email address by clicking on the box beside **Send a copy of this event to my email**, which is located just below the attendees display.



   - Click **Save**, which is located at the bottom of the screen.

12. To verify that the event has been scheduled appropriately, change the date range of the **Monthly Events** display on your screen to the date you just set. Do this by clicking on the **text entry boxes** on the right side of the **Monthly Events** label and restricting the start and end dates to the date of the new event.

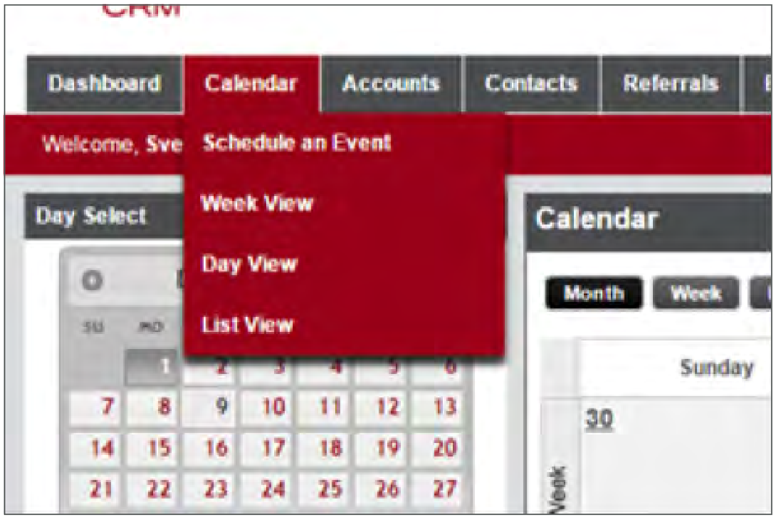
13. The new event should now be displayed in the **Monthly Events** area, including time, location, associated contacts and subject.

REMEMBER: By entering the event type as **Cold Call**, you will not need to associate a contact to the event. It's important to note, be sure to use events like cold call at your sales managers discretion as these events when used incorrectly can impact reporting. By default, you'll want to have at least a contact or account and in some cases both attached to most sales event types in PlayMaker CRM.

Schedule an Event without a Contact or Account association

Internal office activities or other activities that will not be associated with an account or contact also can be scheduled in PlayMaker's calendar.

1. Go to the main PlayMaker menu bar and **hover over the Calendar tab**. Click on **Schedule an Event** from the dropdown menu that appears.



2. In the **New Event** window that appears, there are no options for related contacts and no account association has been made.
3. Enter in a descriptive subject name (e.g., Intra-office meeting – Weekly) in the **Subject** field. Add a **location, importance, start time** and **recurrence**.
4. Change the **Event Type** to **Other** by making the selection from the dropdown menu.
5. Click **Save**, which is located in the black bar labeled **New Event** near the top of the screen.

REMEMBER: Call notes can be entered directly into the PlayMaker calendar by clicking **Add a Call Note**. On the mobile app, a user can also use voice-to-text or handwriting-to-text if your hardware supports that functionality.

15. Custom Views

Almost all CRM programs have built-in ways to make it easier to search and sort your information in a way that makes the most sense for you. In PlayMaker, custom views can be used to accomplish this very task. You can create custom views to have easy access to key referral source details (contacts, accounts and referrals tabs) you use most often.

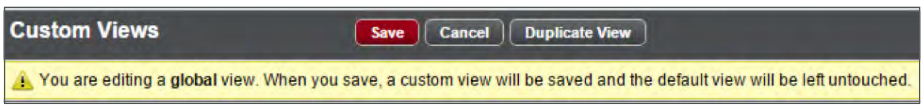
Building Custom Contact Views

Click on the **Contacts** tab in the main PlayMaker menu bar to reach a list of your contacts. For some agencies, the number of contacts can be in the thousands.

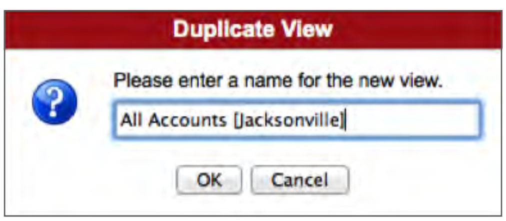
If there is a particular view you will want to see multiple times (e.g., all the contacts in a particular city), you can create a custom view to avoid repeatedly searching for those results.

1. Click **Edit View**, which is located immediately to the right of the **Change View** box in the main Contacts display, which currently reads **All Contacts**.

2. Click **Duplicate View**, which is located in the black menu bar labeled **Custom Views**.
   - This will preserve the existing All Contacts view, but will allow the creation of your new custom view.

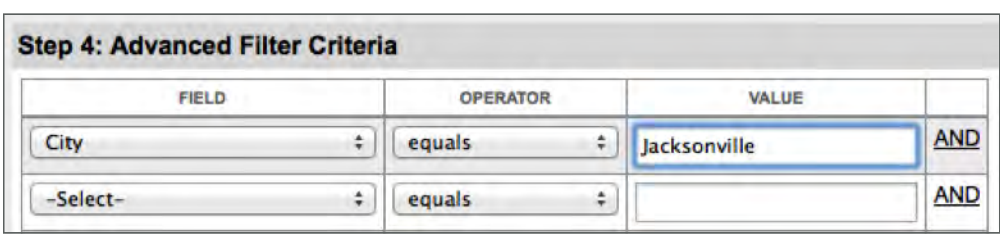


3. Enter a **name** for the new view in the box that appears that is labeled Duplicate View (e.g., All Contacts – Nashville). Click **OK**.



4. In the **Custom Views** display that appears, all the fields that appeared in the original **All Contacts** view will be present.

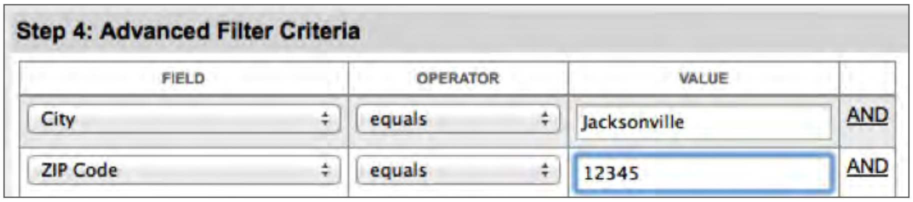
5. Scroll down to **Step 4: Advanced Filter Criteria**. To restrict the new custom view to only those contacts within a particular city, for example, change the entry in the first line for **Field** to **City** by selecting it from the dropdown menu. The **Operator** should remain equals. In the field for **Value**, type the **city name** (e.g., Nashville).



6. Click **Save**, which is located in near the top of the screen in the black bar labeled Custom Views. The new view has been created and is now accessible within your account without having to search.

Advanced View Filter Criteria

1. To add further specificity to the view, click **Edit View**, which is located immediately to the right of the **Change View** box in the main Contacts display, which currently displays the name you gave to your new custom view.
2. Return to the **Step 4: Advanced Filter Criteria**. Add a filter for the new information you want displayed by selecting it from the options in the second line. For example, change **Field** to **ZIP code** by selecting it from the dropdown menu. Allow **Operator** to remain at equals. Type the desired ZIP code into the **Value** field.

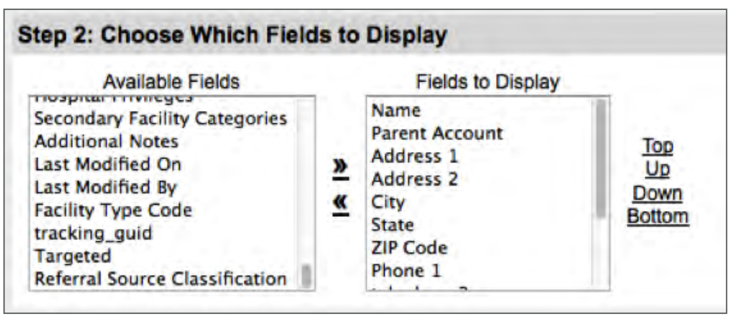


3. Click **Save**, which is located in near the top of the screen in the black bar labeled Custom Views. The view now has been changed and is accessible within your account without having to search.

Choose Which Fields to Display for your View

You can change the order that the columns are displayed in your custom views as well.

1. Click on **Edit View**, which is located immediately to the right of the Change View box in the main Contacts display, which currently displays the name you gave to your new custom view.
2. In the **Custom Views** display, go to **Step 2: Choose Which Fields to Display**.



3. Change the order that the fields are displayed by clicking on the field you want to move in the **Fields to Display** display.
4. Click on the directional instruction that corresponds to the action you would like (**Top, Up, Down, Bottom**). These are located immediately to the right of the Fields to Display display.
5. Click **Save**, which is located in near the top of the screen in the black bar labeled Custom Views. The view now has been changed with the columns reordered and is now accessible within your account without having to search.

To access any custom view that has been created, simply access the dropdown list to the left of the **Edit View** option within the **Contacts, Accounts,** or **Referrals**.

> **REMEMBER:** A PlayMaker CRM best practice is to associate every contact to an account.

Building Custom Account Views

Custom views also can be created for your accounts. **Follow the same steps** as detailed for building custom contact views, but do so in the **Accounts** tab, which is located in the main PlayMaker menu bar. (See page 52).

16. Bookmarks

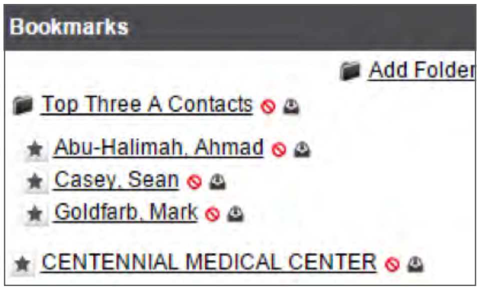
Bookmarks are a timesaving feature built into PlayMaker to allow you to easily access pages you use frequently (e.g., a specific account or contact).

Creating Bookmarks

1. Navigate to the page you would like bookmarked (e.g., the Account Details screen for an account you use often).
2. Click on the word **Bookmark**, located in the upper right corner of the main display.
3. **Enter a name** for the bookmark in the window labeled **New Bookmark** that appears. Click **OK**.
4. Your new bookmark now will be listed on the left side of the screen in the area labeled **Bookmarks**.

Organizing Bookmarks

As your list of bookmarks grows, you may find it helpful to categorize them in order to use them more effectively (e.g., bookmarks for all contacts within a specific account grouped together).



1. Click **Add Folder**, which is located on the left side of the screen and immediately below the black bar labeled Bookmarks.
2. **Enter a name** for the folder in the window labeled **New Folder** that appears. Click **OK**.
3. Your new folder now will be listed on the left side of the screen in the area labeled **Bookmarks**.
4. To add a bookmark to a folder, **click on the icon** to the far right of the bookmark name in the area labeled Bookmarks. Select the appropriate folder from the dropdown menu that appears in the **Move Bookmark** window. Click **OK**.

REMEMBER: To expand and view the contents of a bookmarks folder, simply click on the folder's name. Like a family tree, the files within will be displayed in an indented format to indicate their position within the folder.

- You may create folders within folders to create the level of organization that makes sense for you (e.g., A-rated folder with sub-folders of top accounts. Then account and contact sub-folders within each top account folder).

Using nested folder groups for bookmarks

17. PlayMaker CRM Mobile App

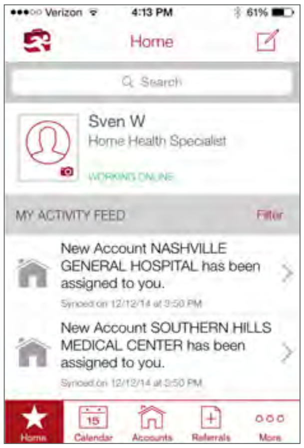
The PlayMaker Mobile application was designed specifically for sales representatives to easily access PlayMaker on your iOS (iPhone or iPad) or Android device.

WARNING: Be aware there are two versions available in the App Store. Please select PlayMaker CRM Mobile App (not classic).

Logging in to PlayMaker CRM Mobile App

1. To begin, tap on the **PlayMaker Mobile icon** on your iPhone or iPad screen.

Search



This functions the same as the search function in the web-based version of PlayMaker.

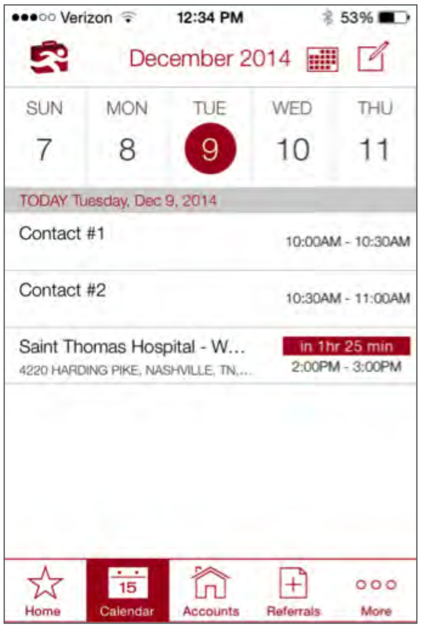
1. A **Search** field is located near the top of the main Dashboard on the home screen.
2. Type in what you are looking for and tap on the **Search** button.
3. To access the information you were searching for, tap on the appropriate search result.

Mobile App Calendar View

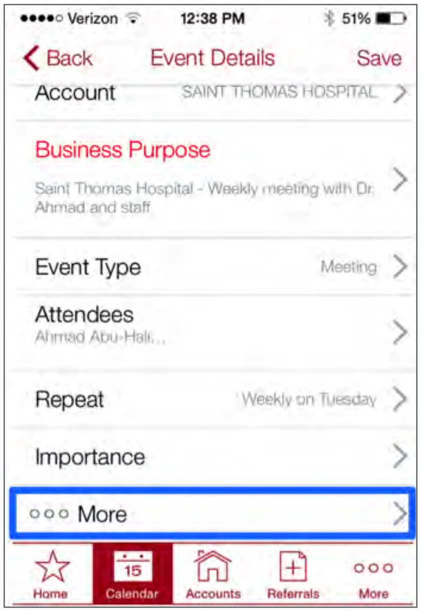
PlayMaker Mobile provides the same level of visibility you have in the main PlayMaker CRM application.

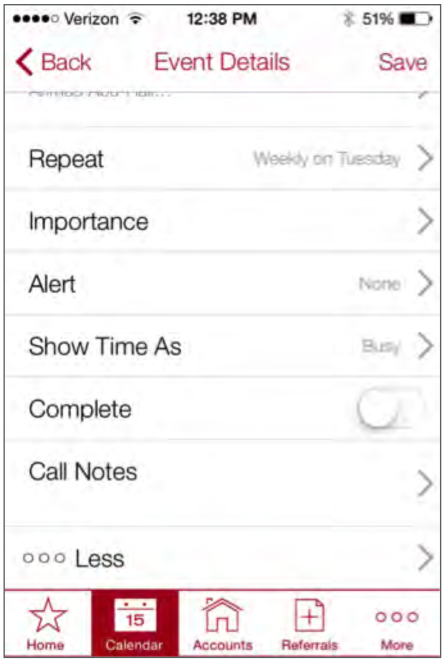
Access the calendar by tapping on the **Calendar** tab located at the bottom of your screen.

1. **Tap on a calendar entry** to open it.
   - This provides you with the same level of detail you have in the full version of PlayMaker, including **event purpose and expected outcome, call/visit notes, previous call/visit notes, address** and **attendees**.



2. To change any information entered into the calendar, **tap on the information and an editing option will appear** (e.g., a date/time selection wheel). Tap **Save**, which is located in the upper right corner of your screen.
3. Document what took place during your visit by clicking on the (… More); then clicking on Call Notes. This will add your documentation to the event's **Call/Visit Notes** section.
   - Using the onscreen keyboard, type your notes based on what you did at the visit.
   - Alternately, if supported by your device, tap on the microphone beside your keyboard's spacebar.
     - Clearly speak your notes into your device. The voice-to-text functionality will translate your spoken words into a text entry.
     - Verify that the text has entered correctly. Tap **Save**.
4. Indicate that a visit has been completed by tapping the Completed Bar. The Bar will turn green, indicating the event is **complete**.
5. Add an event to the calendar by going to the account's page (locate it via search). Remember to use the ACE methodology (**Account, Contact, Event**).
   - Tap on the **Schedule** (calendar icon) towards the top of the screen. This will pull up the Create Event page.
   - The **Create Event** page will allow you to enter your Title, Start/End dates and times, Event Purpose, Event Type and link Attendees.
   - Tap **Save.**





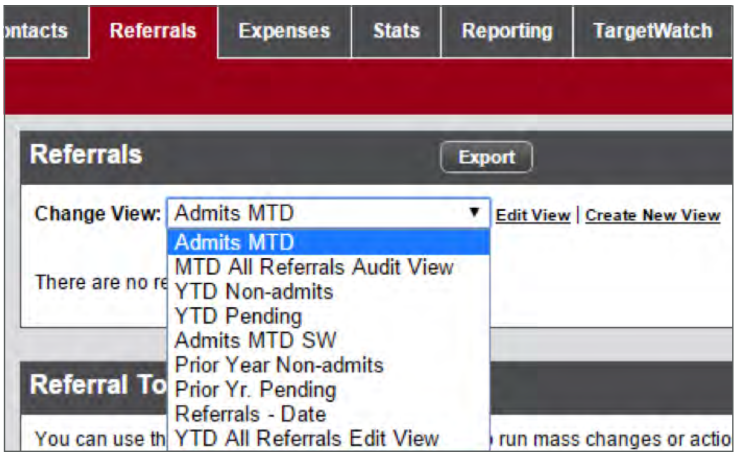
REMEMBER: If you have entered the account address and phone number and have mapping functionality on your corresponding hardware, PlayMaker will show you where the account is located on the map. In addition, under the calendar on the mobile app, the phone number will be a hot key and can auto dial.

18. Referrals

Information about the referrals your agency receives is available in the **Referrals** tab. This tab is located in the main PlayMaker CRM menu bar.

Views

- All Referrals: Locate the **All Referrals** view in the dropdown menu beside the Change View label in the Referrals section.



  This view displays every referral your agency has received, including the user responsible for the referral, the referring physician, date entered, referral status (e.g., non-admit), patient name, insurance type, and non-admit date.

  The gray bar at the bottom of the record display shows an overview of your number of total referrals, admits, pending, non-admits, and Medicaid.

  Although this view provides extensive visibility, you likely also will have the need for a more granular display of information.

- **Other Views**: Alternate views, including custom views, can provide you displays of specific data. Locate these in the dropdown menu beside the Change View label in the Referrals section (e.g., All Non-Admissions)

- **Referral Information**: A wealth of information is collected and tracked for each referral recorded in PlayMaker CRM.

  View a referral by clicking on the word **View**, which is located to the left of any referral entry in the Referrals display.

  The information displayed includes the user, referring physician, referring facility, referral influencer, referral date, referral status, insurance type, patient name and other fields. Additional information present includes notes, admission information, non-admission information, patient details and record details.

- **Printable View**: When you have displayed a view you are interested in generating a hard copy report for, click on the Printable View button, which is located near the top of the screen in the black bar labeled Referrals.

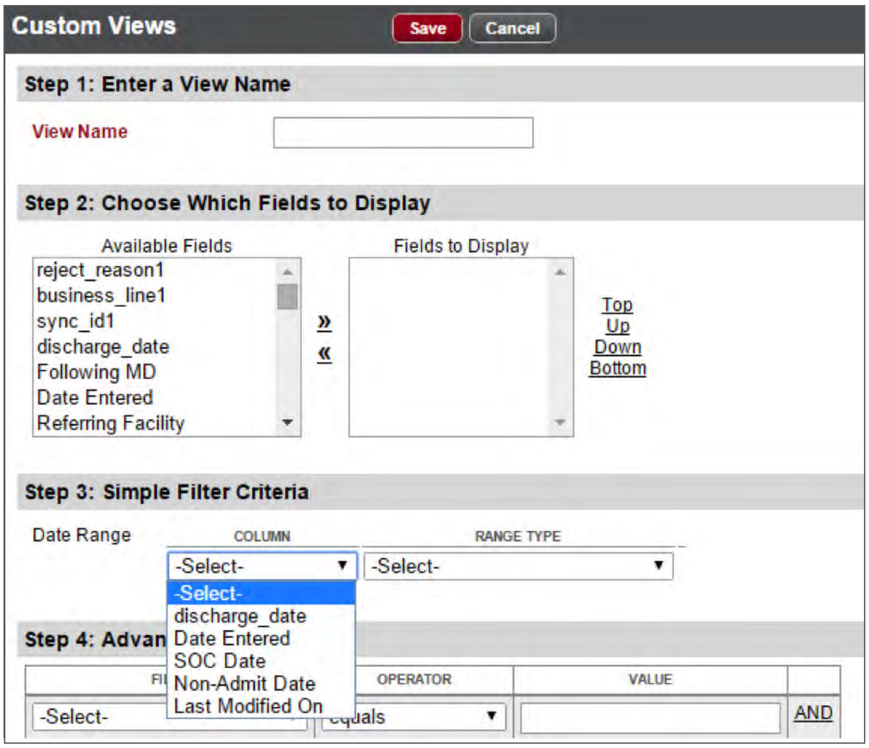
- **Exporting Data**: If you would like to work with the data you have displayed in any view in another program such as Excel, you can easily do so by clicking **Export**, which is located near the top of the screen in the black bar labeled Referrals.

Custom Views

You can create custom views to have easy access to displays of information you use often in Referrals. This will prevent the need to repeatedly search for the information. Any information tracked in Referrals can be built into a custom view.

You can customize views by either creating new views or customizing existing views.

- **Create New View**: Begin by clicking on the phrase **Create New View**, which is located on the Referrals page to the right of the Change View field near the top of the page.



**Note: Your views "Available Fields" may vary*

1. Under **Step 1: Enter a View Name**, enter a name for the new view in the text box.
2. Under **Step 2: Choose Which Fields to Display**, add fields you would like displayed in the new view by highlighting them individually in the **Available Fields** column and clicking on the arrow pointing right to add them to the **Fields to Display** column.
   - Adjust the order of the fields you wish to display by highlighting an individual field and using the directional words to the right of the display to indicate whether it should be moved to the top or bottom of the list, or simply up or down within the list.
3. Skip to **Step 4: Advanced Filter Criteria**. Use the dropdown menus beneath **Field, Operator** and **Value** to set the items to search for (e.g., if searching for referrals from a specific physician, change **Field** to **Referring Physician**, leave **Operator** as equals, and click on the **Value** field and select the appropriate name from the resulting list). Click **Save**, located near the top of the screen in the black bar labeled Custom Views.

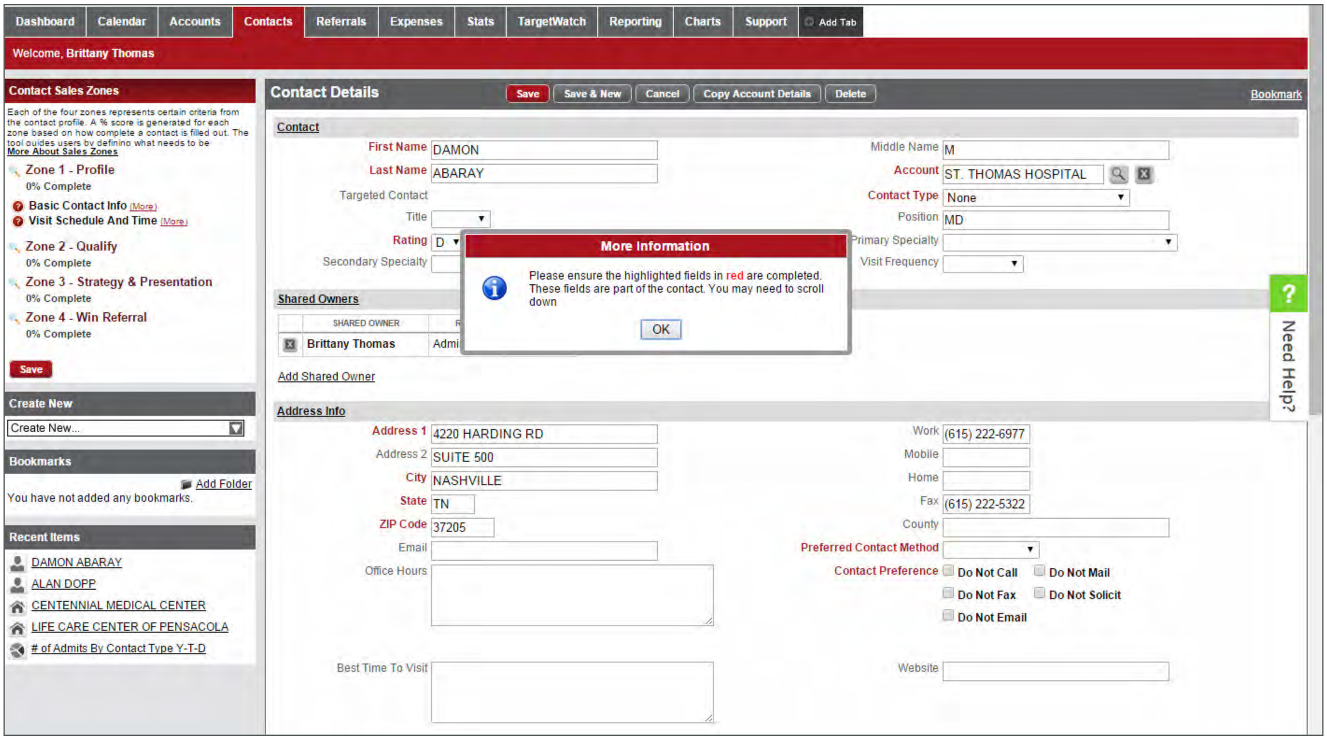
4. To restrict your results to a specific date range, in the main referrals view for that custom view, click on **Edit View**, which is located immediately to the right of the Change View box in the main Contacts display, which currently displays the name you gave to your new custom view.

   - Under **Step 3: Simple Filter Criteria**, use the dropdown menus to choose the **date type** (e.g., Non-Admit Date) and the range type (e.g., Within a Range). Enter the appropriate information in the fields that appear.
   - Click **Save**, located near the top of the screen in the black bar labeled Custom Views.

WARNING: When creating a new view, be sure restrict the visibility of the view to “Visible Only To Me.” Use caution when checking the “Visible to All Employees” option as checking this box will push the custom views to ALL users in the organization.

19. Sales Zones

PlayMaker provides the **Contact Sales Zones** feature within the **Contacts** section to help users navigate through the contact creation process. As contacts are added to PlayMaker, the Contact Sales Zones will walk users through the process of appropriate data entry for effective use in the program.



When you create a new contact, the Contact Sales Zones will be visible on the left side of the screen, highlighted in red.

The four Sales Zones include a percentage measurement to indicate progress toward fulfillment.

Click **Edit Sales Zones**, which is located at the bottom of the Contact Sales Zones window.

- **Zone 1 – Profile**. Click on the label for Zone 1 – Profile. It will display two important categories: **Basic Contact Info**, and **Visit Schedule and Time**.

   1. Click on the **More** link located to the right of the first category (**Basic Contact Info**). An alert will display indicating that the fields now highlighted in red within Contact Details should be completed. Click **OK**. Update/add any information in the red fields as needed.

   2. If an account association already has been made, you can save time by copying relevant information already entered into PlayMaker for an account. To do this, click **Copy Account Details**, which is located near the top of the page in the black bar labeled Contact Details.

      - Click on the **box beside any detail** you would like copied from the **Account.** To select all fields at once, click on the box that serves as a **heading** for the first column and check marks will appear beside all entries.

      - Click **Copy Selected Fields** located at the bottom of the window. The information then will be entered into the appropriate Contact Details fields automatically.

   3. Ensuring that all of the **fields highlighted in red** have been addressed will satisfy the requirements of the zone.

4. Click on the **More** link located to the right of the second category (**Visit Schedule and Time**). An alert will display indicating that the new fields now highlighted in red within Contact Details should be completed. Click **OK**. Update/add any information in the red fields as needed.
5. After all the information for the fields highlighted in red has been completed, click **Save**, which is located at the bottom of the Contact Sales Zones window. The Zone 1 – Profile area will now update to reflect 100% completion.

- **Zone 2 – Qualify**. Click on the label for Zone 2 – Qualify. It will display two important categories: **Payer Mix** and **Potential Referrals/Month**.

1. Click on the **More** link located to the right of the first category (**Payer Mix**). An alert will display indicating that the fields now highlighted in red within Contact Details should be completed. Click **OK**. Update or add any information in the red fields as needed.
2. Click on the **More** link located to the right of the second category (**Potential Referrals/Month**). An alert will display indicating that the new fields now highlighted in red within Contact Details should be completed. Click **OK**. Update/add any information in the red fields as needed.
3. After all the information for the fields highlighted in red has been completed, click **Save**, which is located at the bottom of the Contact Sales Zones window. The Zone 2 – Qualify area will now update to reflect 100% completion.

- **Zone 3 – Strategy & Presentation**. Click on the label for Zone 3 – Strategy & Presentation. It will display important considerations you must make in planning to secure referrals.

1. Actions you need to take to satisfy this zone will be listed beneath the Zone 3 label in the **Contact Sales Zones** area. These include checking for unmet needs provided by existing competitors, providing a date you will ask for a referral, the referral method preference, and the date you anticipate the first admission from this contact.
2. After all the queries have been addressed, click **Save**, which is located at the bottom of the Contact Sales Zones window. The Zone 3 – Strategy & Presentation area will now update to reflect 100% completion.

- **Zone 4 – Win Referral**. Click on the label for Zone 4 – Win Referral. It will display fields relevant to your first referral.

1. After you have received your first referral from this contact, enter that date here to compare it with the date you forecasted.
2. You also can forecast future admission volume of 5 or better and designate the contact as an A-rated account.

Sales Zones – Accounts

Sales Zones also can be reviewed within the **Account Information** for a specific account. This at-a-glance view is accessible through any account and allows you to quickly see which individuals have their Sales Zones updated and which do not.

+/- Contacts New Contact Merge Contacts

	ACTIONS	CONTACT NAME	SHARED OWNERS	CONTACT TYPE	ACCOUNT	ZONE 1	ZONE 2	ZONE 3	ZONE 4	COMPLETED EVENTS MTD	TOTAL VISIT NOTES MTD	REFERRALS MTD	ADMITS MTD	EXPENSES MTD
	View | Edit	JAMII JOHNSON	Brittany	None	MEHARRY MEDICAL COLLEGE	100% on 01/30/2015	50%	0%	0%	0	0	0	0	$0.00
	View | Edit	MEDHAT KALLINY	Brittany	None	MEHARRY MEDICAL COLLEGE	50%	50%	0%	0%	0	0	0	0	$0.00
	View | Edit	SUVARNA MAHADASYAM	Brittany	None	MEHARRY MEDICAL COLLEGE	0%	0%	0%	0%	0	0	0	0	$0.00
	View | Edit	TARA HOOK	Brittany	None	MEHARRY MEDICAL COLLEGE	0%	0%	0%	0%	0	0	0	0	$0.00

Display 10 1-4 of 4 Previous Next Page 1 of 1 Go

Associated Contacts sub-section under Accounts

- Go to the **Account Details** page for any account you would like to check for Sales Zone completion.
- Scroll down to the **Contacts** display.
    - Each contact will have a column for **Zone 1, Zone 2, Zone 3** and **Zone 4**.
    - A percentage reflecting the progress to completion for each sales zone is displayed in the corresponding cell for each column.

20. Reports

PlayMaker provides the ability to generate many helpful reports. In addition to the dozens available by default, PlayMaker can build custom reports for you to ensure you have the information you need in the format most helpful to you.

Most reports will not have much information until you have begun loading in referral information, calendar activities, contacts and accounts.

> **TIP:** All custom report requests should be directed to the PlayMaker CRM Client Success Team at 1–877–634–9692.

Access reports by clicking on the **Reporting** tab, which is located in the main PlayMaker CRM menu bar.

Overview

Click on a report name to view the report. The following options are available in all reports:

- **Print**: Generate a hard copy of a report.
  1. Click **Print**, which is located in the main display in the black bar labeled Reporting.
  2. Follow the instructions to print out a hard copy of the report on your printer.
- **Export**: Send data from PlayMaker to another program for additional calculations/internal work.
  1. Reports can be exported in either an **Adobe® PDF** format or .CSV file for **Microsoft® Excel** format.
  2. In the main **Report Categories** display, accessible by clicking on the **Reporting** tab in the main PlayMaker CRM menu bar, scroll down to the desired report. The far right column labeled **Actions** contains icons to allow easy exporting.
     - Click on the **PDF** or **Excel** icon to export that report.
- **Schedule**: Instruct the system to create specific reports automatically.
- Click **Schedule**, which is located in the main reporting display, just above the list display of the requested data.
- In the **Schedule Report** menu that appears, enter a start date for the automatic report generation.
  1. Select a time interval from the dropdown menu labeled **Time Interval**. Options include daily, weekly, bi-weekly, every four weeks, last of the month, and first of the month.
  2. Select a format for the emailed report from the dropdown menu labeled **File Format**. Options are PDF and CSV (Comma Separated Values, ideal for use in Microsoft® Excel).
  3. The report will be emailed to you by default. To include others in the distribution list, including those who may not be PlayMaker users, enter the appropriate email addresses in the box labeled Email addresses.
  4. To include any text along with the emailed report, enter it in the box labeled **Message to include with email**.
  5. If you would like to prevent reports from being sent in instances when no data is present (e.g., a daily expense report without any expenses for that date), select the appropriate option from the dropdown menu labeled **Only send email when report returns at least 1 result?**

6. To make the report active, indicate this in the dropdown menu labeled **Status**.

7. Click **Save**, which is located at the bottom of the window.

8. Verify the schedule by returning to the main **Report Categories** display by clicking on the **Reporting** tab in the main PlayMaker menu bar. Scroll down to the scheduled report and the status under **Schedule Report** should now reflect your desired interval. Unscheduled reports will be labeled **Not scheduled**.

- **Favorites**: Designating a report as a favorite will allow you to access it easily.

1. Locate the **Favorite Reports** display by scrolling to the top of the main **Report Categories** display. It is located in the far right column, just below the red welcome bar.

2. To designate a report as a favorite, locate the appropriate report in the main Report Categories display. Click on the **star icon with a green plus sign**, which is located in the far right column under the **Actions** column heading.

   - The report immediately will be added to the **Favorite Reports** list.

3. To remove a report from the list of Favorite Reports, go to the list and locate the report. Click on the **red image of a circle with a line through it**, located to the right of the report name. It immediately will be removed from the list.

4. Another way to remove a report from the Favorite Reports list is to locate the appropriate report in the Report Categories list. Click on the **star icon with a red circle with a line through it**, which is located in the far right column under the Actions column heading. It immediately will be removed from the list.

- **Custom Reports**: Many reports will have filters near the top of the display that will let you change the information that is displayed (e.g., changing the date range of a particular report). If the filtered report is one you would like multiple times, you can save it as a custom report.

1. On the page displaying your newly customized report, click **Save As**, located near the top of the screen in the black bar labeled Reporting.

2. In the **Save Report As** window that appears, enter a new name for the customized report. Click **Save**.

3. As the program returns to the **Reporting** display screen, the report will now display the new title in red.

4. Customized reports will be listed together in the main Reporting page's **Report Categories** display under the label **My Saved Reports**.

Commonly Used Reports

- **Daily Visit Report**: This creates a streamlined view of all calendar activities for an individual user. Sales Managers can review this data for anyone within an agency. Managers will have visibility to their direct reports. Sales reps can see only their own information.

1. Locate the report in the main **Report Categories** display by scrolling to the **Events** section. Click on **Daily Visit Report**.

2. The Reporting display that appears will list all activities, including their scheduled time, account name, contact frequency, and visit type. Entries under the **Call/Visit Notes** column heading show what happened during the activities. Entries under the **Completed** column heading indicate whether the activity was completed.

3. You can view the activities for more than just a single day. To change the view, select a new date range from the dropdown menu beside the label **Date Range** near the top of the main Reporting display. Click **Run Report**, located just below the Date Range label.

- **Advanced Sales Territory Summary Report**: This report summarizes sales activities and referrals by referral source per user, providing great visibility to each user's book of business.

1. Locate the report in the main **Report Categories** display by scrolling to the **Events** section. Click on **Advanced Sales Territory Summary Report**.

2. The Reporting display that appears will have comprehensive coverage of the user's activities, including days since last login, calls scheduled in current week, completed sales calls last week, completed sales calls with notes last week, total number of accounts, accounts with no activity, referrals and admissions.

3. All entries displayed in red and underlined are clickable links. These will provide more details about the information included in the report (e.g., clicking on the number of accounts with no activity in 30 days will take you to a **Detailed Sales Territory Account Activity Report**, which will show the names of these accounts, their associated contacts, account owners, last calendar event and subject, and other information. The display of admission numbers can help you prioritize the accounts.).

   - To affect a change within an account you have located through a red, clickable link in a Detailed AE Account Activity Report, click the check box to the far left of the desired account name.

   - Scroll to the bottom of the screen. From the dropdown menu labeled **Bulk Actions**, select the appropriate action (e.g., Assign Shared Owner).

PLAYMAKER CRM

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