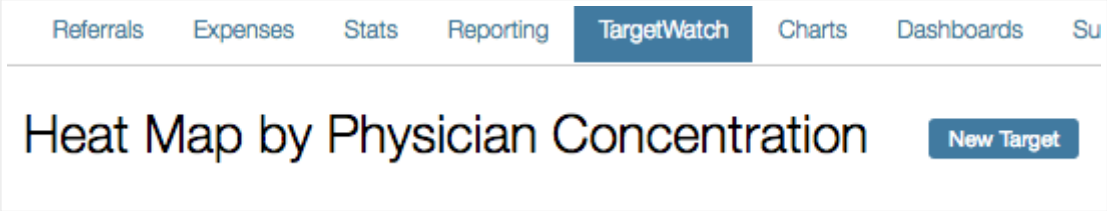
Creating A Target In TargetWatch

TargetWatch offers a quick way to search for records via the Search Active Tab box. While that feature will help find records, the real power of TargetWatch is found in creating targets. This article discusses what a target it is, and how to create one.

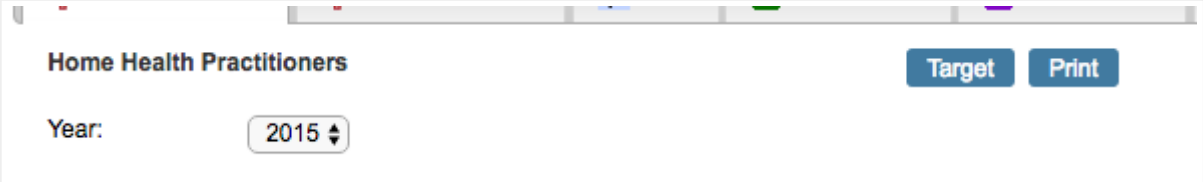
What is a Target?

Similar to Views on the Accounts, Contacts, and Referrals pages, *targets* are filters that can be saved to consistently show a particular set of data, making it easy to return to that set of data at any time. Targets can be used to help the process of assigning contact or account ownership in TargetWatch, or to review referral trends for a particular set of physicians. Targets can also be created to automatically apply pre-defined filtering to a new area of the Heat Map.

Creating a Target



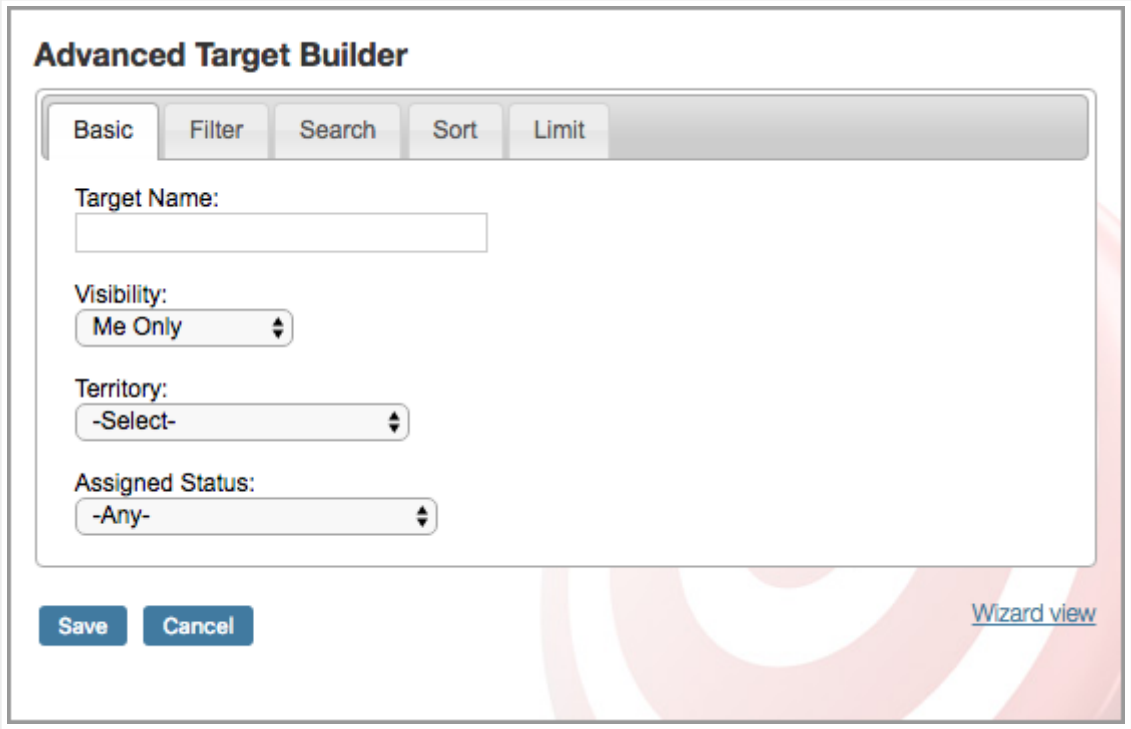
There are two buttons that allow users to create targets in TargetWatch. The *New Target* button is found above the Heat Map (pictured above). Clicking this link will open up the *Advanced Target Builder* window, which is where all of the filtering is done.



Additionally, there is a *Target* button above the table of results below the Heat Map (above). This button will create a target and load it immediately. To make changes to the target, users will then need to click the *Edit Target* button. Once that button is clicked, the *Advanced Target Builder* window will appear.

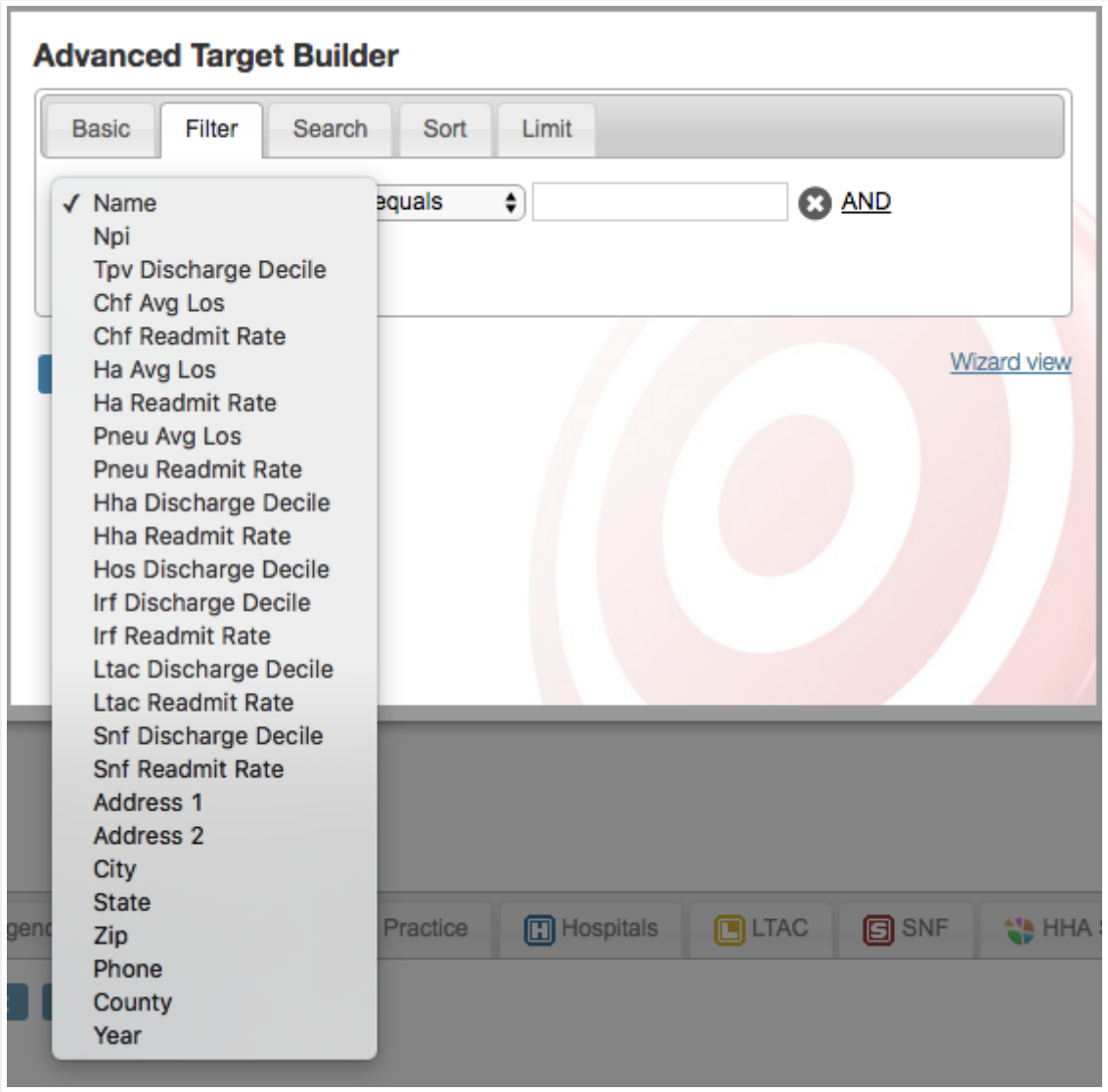
Advanced Target Builder

The Advanced Target Builder window contains five tabs that can be used to name and filter the target.



Basic Tab - The basic tab (above) contains the name of the target, a dropdown menu that can set permission for which users can view the target, the territory (state, county, zip code, etc.) of the target, and whether or not Assigned contacts and accounts show on the target.

Tips: When naming the target, it is suggested that the name is descriptive so that it is easy to know what will be viewed when the target is retrieved in the future. *10DecilePatientVol_HHA Physicians_Entire State* could be an example, if a target is created for all HHA Physicians with a 10 decile ranking in Patient Volume for the entire state. Additionally, an option named *Auto-adjust to current view* exists in the Territory dropdown. When this is selected, the filter will pull any relevant matches as a user navigates to different areas on the Heat Map. If a user is going from zip code to zip code, or county to county, looking for particular physicians or facilities, this option will provide consistent filtering over different areas. Similarly, if a user transitions from a state view to a county view, the results will also transition from state to the selected county.



Filter Tab - This tab contains options to filter data, such as location or decile ranking. Adding additional filters while using the "AND" operator will require both fields are met. The "OR" operator will require that at least one criteria is met.

Note: Using different operators in the same search can lead to mixed results. To illustrate how the "AND" and "OR" operators work, consider this example:

Requirement 1 AND

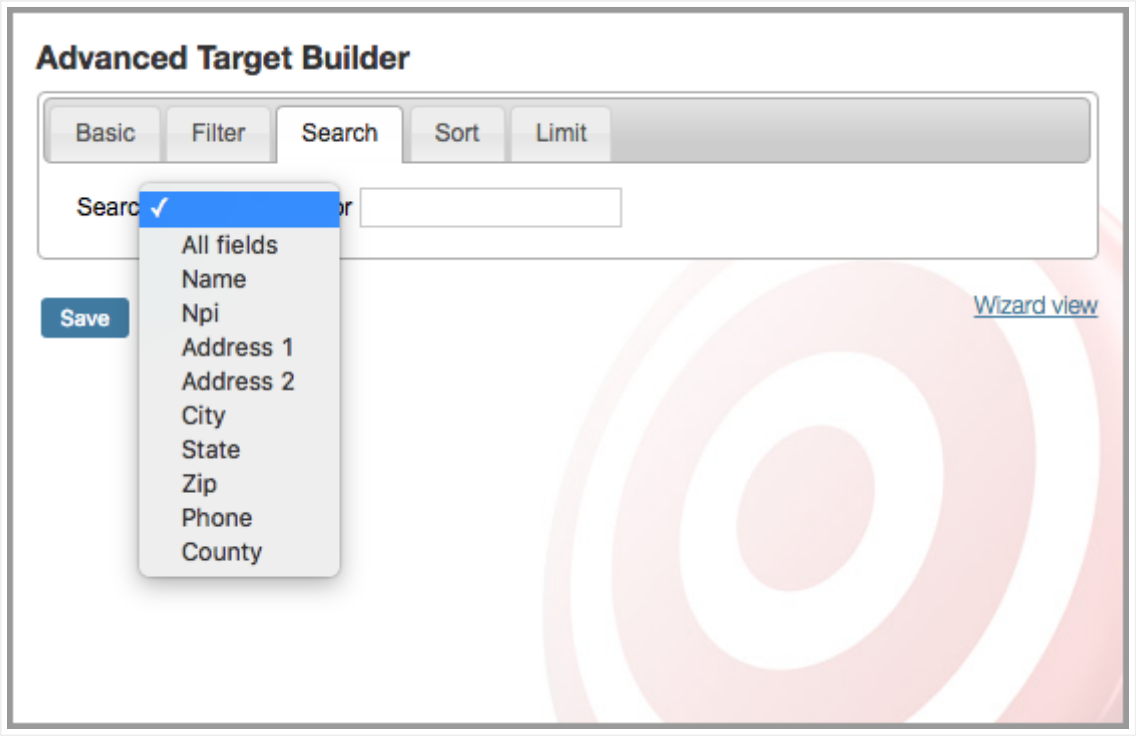
Requirement 2 OR

Requirement 3

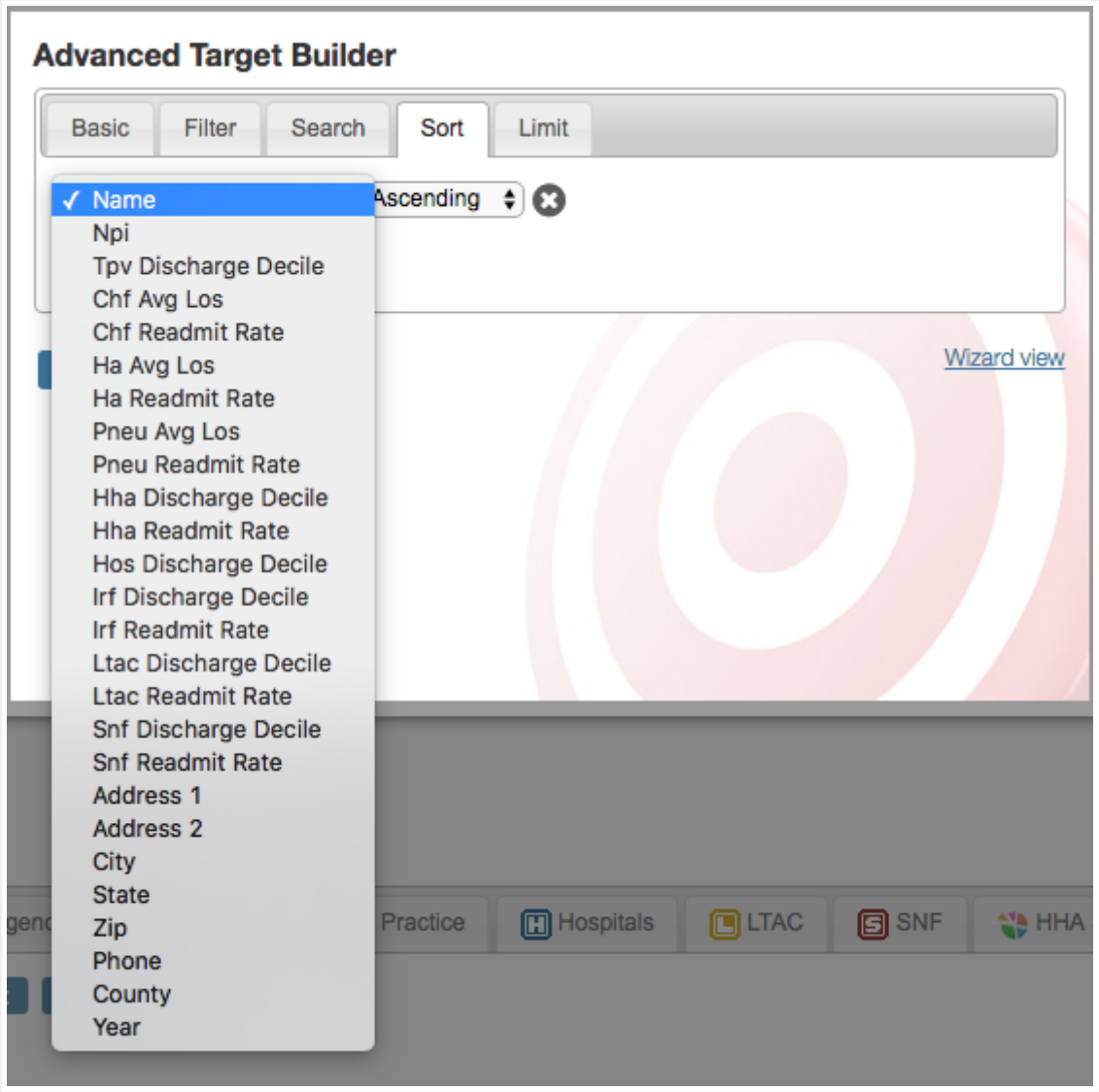
The above requirements would function as if they were grouped like this:

(*Requirement 1* AND *Requirement 2*) OR *Requirement 3*

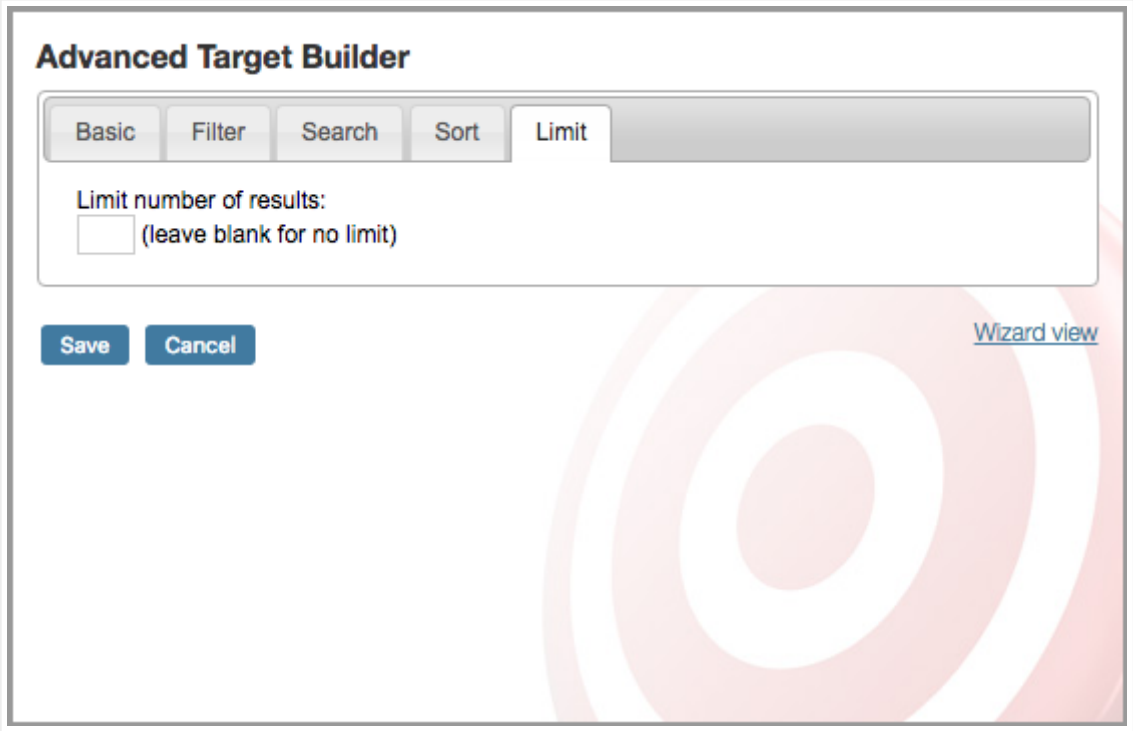
The "AND" operator binds that requirement to the next, making both necessary. The "OR" operator allows for a requirement to be completely independent of other filter requirements.



Search Tab - Much like the Search Active Tab feature, this tab allows users to include a specific name or term to include along side the filters set on the previous tab.



Sort Tab - This tab allows users to set the order in which results will be displayed, which can help put the most relevant results first. The sorting options are listed in the image above.



Limit Tab - The last tab in the *Advanced Target Builder* provides a way to limit the number of results that are displayed in the target. This is a great way to see the top ten physicians that meet the filter criteria.

Note: If a limit is set to 25 results, and only 12 results are shown, then there aren't enough results that match the filter criteria. As an example, if searching for the top 25 HHA Practitioners with a Total Patient Volume decile ranking of 10 in a particular zip code, there may not be enough Physicians that meet that decile ranking in that area. Changing the decile ranking to 8 or higher will likely then display the top 25 results as more practitioners will meet the filter criteria.

Saving the Target

After all of the tabs have been updated to find the desired data, clicking *Save* will load the target. Saved targets will be listed in the TargetWatch box in the left column of the TargetWatch page. New targets will be listed in the *Uncategorized Targets* folder, but can be moved into other folders. These links can be clicked at any time to load the associated target.