

# Account Details

Each accounts contains important information and details to assist a marketer or liaison in building and developing relationship with referral sources.

## Account Details Summary

When viewing *Account Details* (click *Accounts* link, then click *View* next to an account), the top fields of the record show the basic information about that account (name, address, etc.). Scrolling down will then show the user a few other additional sections, providing more insight into the account. Each Account profile has the following sections:

- **Profile:** key information about the account
- **Shared Owners:** identifies the individuals in your agency that are responsible for this account
- **Address Info:** address details
- **Facility Info:** information and statistics that provide a picture of the type of facility
- **Additional Notes:** free text notes
- **Record Details:** read-only section outlining data elements received from your EMR
- **Contacts:** associated people/individuals at that accounts
- **Monthly Events:** marketing activities that have occurred or are scheduled to occur with this account
- **Historical Call Notes:** notes from past marketing activities
- **Referrals:** associated referrals from this account/facility
- **Additional Communication**
- **Account Health Index:** graphical representation of referrals, admits, and activities for the account

## Contacts Section

The *Contacts* section shows all contacts associated to an account. In the screenshot below, two separate marketers are assigned contacts of this account, and one contact is not assigned a Shared

Owner (marketer, liaison, etc.). New contacts related to the account can be created here by clicking the *New Contact* button. Contacts created from the *Account Details* page will automatically be linked to the account that is being viewed.

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
<input type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	AARON SALYAPONGSE	Sam Wilson	Physician	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	2	2	0	0	\$0.00
<input type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	EDWARD TANG		Physician	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	0	0	0	0	\$0.00
<input type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	JOSHUA RICHARDS	Scott Lang	Physician	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	0	0	0	0	\$0.00
<input type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	MICHAEL TSENG	Sam Wilson	Physician	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	0	0	0	0	\$0.00
<input type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	Samanta Williams	Scott Lang	Receptionist	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	0	0	0	0	\$0.00
<input checked="" type="checkbox"/>	<a href="#">View</a>   <a href="#">Edit</a>	Stacy Jones	Sam Wilson	Registered Nurse	WEBSTER ORTHOPAEDIC MEDICAL GROUP	0%	0%	0%	0%	2	2	0	0	\$0.00

Display 10 1-6 of 6      << Previous Next >>      Page 1 of 1 Go

**Note:** *If contacts are associated with events, but are not associated with accounts, most of the following sections will contain no data. Accounts will only provide an overview for any contacts associated to it.*

These details also provide users with the ability to see if other marketers have ownership of contacts at facilities they visit, as well as provides an opportunity to view possible duplicates, or to see that the user may need to request ownership of a contact that is associated with the account, but doesn't have a Shared Owner.

## Monthly Events Section

This section will show all events for the account for the current month. The time period can be modified in the top right corner of the section to display a different timeframe. The *New Event* button will allow a user to create a new event right from the *Account Details* page. Any contacts associated to the account will be available to add as attendees for the new event.

Monthly Events 10/01/2016 to 10/31/2016 [Go](#)

ACTIONS	USER	TIME	LOCATION	EVENT TYPE	ACCOUNT	ASSOCIATED CONTACTS	SUBJECT	CALL/VISIT NOTES
<a href="#">View</a>   <a href="#">Edit</a>	Sam Wilson	10/3/2016 10:03 AM		Face-to-face	WEBSTER ORTHOPAEDIC MEDICAL GROUP	AARON SALLYAPONGSE Stacy Jones	Webster Ortho - Weekly	Stacy provided patient info for referral. Patient should be referred on Wednesday, 10/5.
<a href="#">View</a>   <a href="#">Edit</a>	Sam Wilson	10/10/2016 10:03 AM		Face-to-face	WEBSTER ORTHOPAEDIC MEDICAL GROUP	AARON SALLYAPONGSE Stacy Jones	Webster Ortho - Weekly	Referral came in last week, and Stacy said that there are two more patients this week that will be referred. Next week bring Thank You card!
<a href="#">View</a>   <a href="#">Edit</a>	Scott Lang	10/12/2016 2:00 PM		Meeting	WEBSTER ORTHOPAEDIC MEDICAL GROUP	JOSHUA RICHARDS Samantha Williams	WOMG - Monthly Meeting	
<a href="#">View</a>   <a href="#">Edit</a>	Sam Wilson	10/17/2016 10:03 AM		Face-to-face	WEBSTER ORTHOPAEDIC MEDICAL GROUP	AARON SALLYAPONGSE Stacy Jones	Webster Ortho - Weekly	
<a href="#">View</a>   <a href="#">Edit</a>	Sam Wilson	10/24/2016 10:03 AM		Face-to-face	WEBSTER ORTHOPAEDIC MEDICAL GROUP	AARON SALLYAPONGSE Stacy Jones	Webster Ortho - Weekly	
<a href="#">View</a>   <a href="#">Edit</a>	Scott Lang	10/26/2016 2:00 PM		Meeting	WEBSTER ORTHOPAEDIC MEDICAL GROUP	JOSHUA RICHARDS Samantha Williams	WOMG - Monthly Meeting	
<a href="#">View</a>   <a href="#">Edit</a>	Sam Wilson	10/31/2016 10:03 AM		Face-to-face	WEBSTER ORTHOPAEDIC MEDICAL GROUP	AARON SALLYAPONGSE Stacy Jones	Webster Ortho - Weekly	

## Historical Notes Section

This is followed by the *Historical Notes* section. This offers notes from previous events with any of the account's associated contacts, presented in a list with the most recent notes at the top.

Historical notes from any user that services the account (or contacts) should be available to view, unless that permission has been revoked by the company's PlayMaker administrator in the [Role Management](#) settings.

Historical Call Notes 10/01/2016 to 10/31/2016 ordered by Event Date Descending [Go](#)

ACTIONS	NOTE	EVENT DATE	ADDED BY
<a href="#">View</a>	Referral came in last week, and Stacy said that there are two more patients this week that will be referred. Next week: bring Thank You card!	10/10/2016 10:03 AM	Sam Wilson
<a href="#">View</a>	Stacy provided patient info for referral. Patient should be referred on Wednesday, 10/5.	10/03/2016 10:03 AM	Sam Wilson

Display 10 1-2 of 2 Page 1 of 1 [Go](#)

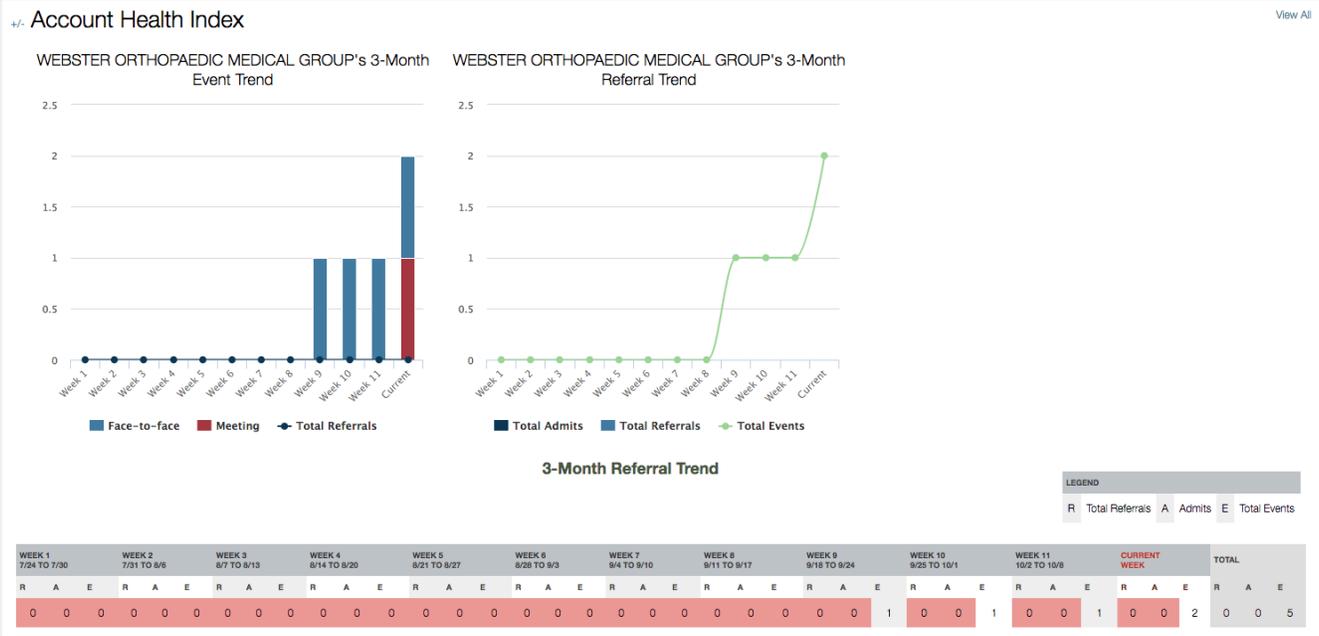
## Referrals Section

The *Referrals* section follows the *Historical Notes*, showing a list of all referrals for the account. The subsequent section is *Additional Communication*, for general note taking on the account.

## Account Health Index Section

The last section of the *Account Details* page is the *Account Health Index*. This area functions as a tool to see the return on investment regarding the number of events completed with an account compared to the number of referrals generated by the account over a rolling 12 week period. In the

screenshot below, the account appears to have recently been assigned, as there is little event history and no referral activity. This can be further confirmed in the three-month trend at the bottom of the section.



It is important to reiterate that the fields discussed in this article would likely have little to no value if the *A.C.E.* method of organizing data isn't followed. Having complete data also improves reporting on both the *Dashboard* as well as in the reports available on the *Reporting* tab. Ensuring that Accounts and Contacts are assigned shared owners ensures that the appropriate users have access to appropriate data. Shared owners are also critical to accuracy in activity and reporting for both users and accounts.