Marketing

The Marketing portion of the Electronic Chart System (ECS) has two components: 1) entering and tracking potential clients and 2) entering and tracking marketing information. The Marketing Department is busy obtaining leads, gathering personal data, taking requests, admitting clients, working with referral sources, and managing advertising activities.

Regarding potential clients, much of the information obtained during the marketing process is needed in the medical record as well, so it only makes sense to have the Marketing Department use American Data to track their leads. Once the information is entered into the system, it is a part of the clinical record when the potential client is admitted to the facility.

When the marketing personnel sign into the system they are presented with their custom Marketing Access screen.

Marketing	Prospective		Reports		Schedules	Other
	New Prospective Client	Deposit Fees	Occupied / Open Rooms	Prospect / Waiting List	Establish Work Schedule	Advertisement Tracking
	Pre-Admit Assessment	Update Status	Referral Sources	Mailing Labels	View Today's Schedule	Business Contacts
	Prospect Info.	Status Breakdown	All Prospect Notes	Deposit Report	To Do List - Report	View Messages
	Referral Info.	Letters / Mailing	Marketing Notes Graph			SNF ADT / Face Sheet
	Contacts	Scheduling / Notes				AL ADT / Face Sheet

Prospective

New Prospective Client

This button will open the Demographics screen. Here, you can add new potential clients to the system or update/change any existing client's information. For any clients that are not officially admitted, their Status must be set to "Referral" in their Demographics, so that users will not see their name on the active client listing. Once they are admitted, their Status gets changed to "Active".

1. From the Marketing Access screen, select New Prospective Client. This will open the Demographics screen.
2. Click New and select Client.
3. Enter the potential client's first name and last name.

4. Next you will see the Birthday/Age field. This field cannot be left blank. If you do not know the potential client's birth date, enter the date of referral in the Birth Date field.
5. Enter any additional demographic data which is known at this point. Click **OK** once ready to go to the Locate screen.
6. The Locate screen will load. Select the **Effective Date** of this change (if different than today) and select a status of **Referral**. Select the **Site** (if more than one choice), as well as appropriate **Service** (if more than one choice). Any other filters located in green are required to create the client record (these may all be set to "None" until the client is admitted).
7. Click **OK** to save the data and create an account.
8. Click **Close** to close the Demographics screen and return to the Access screen.

Charting Topics

To document information in the below topics, click onto the desired button, select the client's name, and click **OK**.

This will load a screen broken out into three portions. The top portion of the screen gives suggested buttons that can be clicked onto to build an entry. The middle portion is where the entry will be developed. One you select something from the top, it places it into the middle portion of the screen. Additional free text can be added in here if needed. The bottom portion is the defined review, which will display information that has already been entered within this topic, or others. Information displayed here may assist you in completing your entry.

Click **Sign** once completed with your entry in a topic. This will save the entry and bring you back to the Marketing Access screen.

A description of what is in included in each topic is listed below.

- **Pre-Admit Assessment** – This is a pre-admission assessment that may be utilized prior to deciding to admit a client or not. Items that are addressed in this assessment include: special equipment needs, payer source, mental status, ADL assistance, hearing, vision, bowel and bladder, therapy, and other additional needs.
- **Prospect Info**. – All information regarding a potential client can be entered into this topic. Items addresses will include their status (high priority, application pending, etc.), current living situation, how soon needing placement, apartment preferences, and care level needed. If you choose to enter additional *Personal Information* or *Contacts* from this topic, all that data will flow into their active record if they are admitted.
- **Referral Info.** – Enter how you obtained the referral or who the referral came from. This information will populate several different graphs and reports for easy tracking of your facility's referral sources.
- **Contacts** – If you are aware of the client's contact information, enter this into here. This data will flow onto the active record if they are then admitted.

- Deposit Fees – Document any deposit fees the client has given to your facility. All deposits are then grouped together in a Deposits report, which can be easily viewed at any time.
- Update Status – If needing to update the client's status from Waiting List or Prospect to Application Pending or Admitted, that can be done from this button. As the client flows through the referral process, their status may change several times.
- Status Breakdown – This button will load a write calculation topic which will automatically calculate how many days a client has been at each status (waiting list, high priority, application accepted, etc.). There is nothing that the user needs to complete in this topic besides click *Sign* to save the numbers that have been calculated. All this data will then populate into the *Marketing – Status Days* report which displays how long prospective clients remain in each status.
- Letters/Mailing – This button will present with different pre-defined letters which can be adjusted prior to saving. Once you select a letter you would like to print, you may any additional free texted items to the middle portion of the screen prior to clicking onto *Print Letters*. Utilize the *View Letters* button to view all prior letters which have been developed, saved, and sent to this client. If needing to print labels, utilize either *Print Label* button from within this topic. If you would like additional letter options added into this screen, contact the Clinical Department at ECS for assistance.
- Scheduling/Notes – In here, you may schedule phone calls, action items (collect deposit, send email, write thank you letter), and appointments. These tasks may be scheduled for specific users (if the facility has this option customized in their topic). Once items are scheduled, there is a ^ *Check Schedule* button that may be viewed to confirm all scheduled task items. In addition, there is a place for a user to document miscellaneous notes regarding the potential client in this topic.

Reports

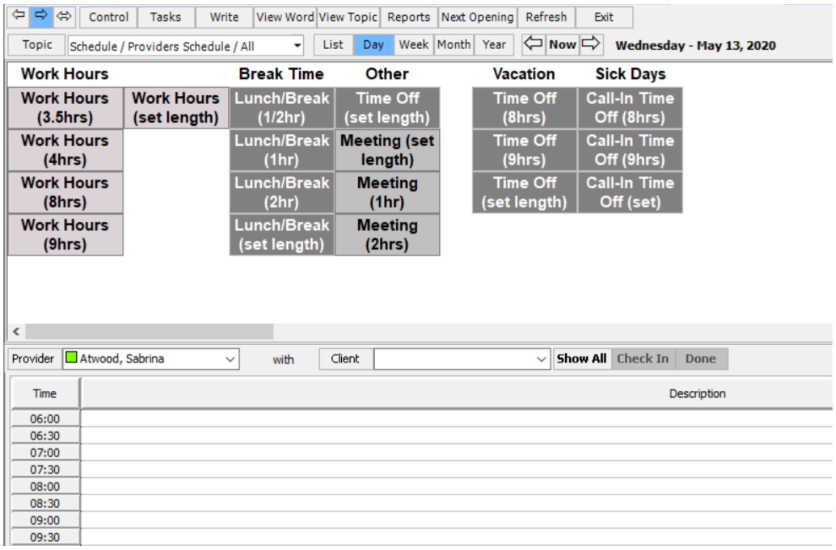
To run a report, click onto the button, select client name(s), and click OK. You may be prompted to select date(s) prior to running the report. If so, select a Start Date/End Date or a period prior to clicking onto OK.

- Occupied/Open Rooms – This button will display a room/bed list for the AL and NH. Each report will display all room numbers as well as who is occupying that room. This will then indicate which rooms are currently unoccupied.
- Referral Sources – This button will run several different break outs of reports. The first report will include graphs which display *Total Referrals by Month* and *Referral Type by Month*. The next two reports have bar graphs to display the number of referrals broken out by specific referral type (for example, the hospital graph will be broken out by each specific hospital which referred your facility). These graphs look at the past 12 months. The last two reports have pie graphs which display the last one month of referral sources by specific type.

- **All Prospect Notes** – This report displays all notes that have been made in the following topics: Prospective Client Info, Referral Info, Scheduling/Notes, Letters, and Deposit Fees on the selected client(s).
- **Marketing Notes Graph** – This button will prompt the user to select from three different reports (Call, Appointments, Actions). Select the specific report you would like to view or keep all highlighted and click *Load*. Each report displays graphs of items that were scheduled vs. completed as well as a breakdown of the specific task types.
- **Prospect/Waiting List** – This button will prompt the user to select from two different reports (Prospect/Waiting List and Status Days). Select the specific report you would like to view or keep both highlighted and click *Load*. The *Prospect/Waiting List* report displays all the potential clients, referral source, room preference, care level, and method of contact. *Status Days* is used with the Status Breakdown calculation screen. It will display the total number of days each client has spent in each status.
- **Mailing Labels** – This button will prompt the user to select from different reports for mailing labels (All Contacts, Alt Contact, Attorney, Mailing List Contacts, Potential Client, and Trust Dept). Select the specific report you would like to view and click *Load*.
- **Deposit Report** – This report will display all client deposits that have been made for all selected name(s).

Schedules

Establish Work Schedule



This button will first prompt you to select a **Provider** (the employee who you are establishing a schedule for). Most likely, you will have to click onto **Filter** > place a check mark in **Active** > click **OK** before any provider names will be listed. Once you can see all provider names, select the name of the schedule you are entering. Click **OK** to load the work schedule screen. Once the screen loads, select a word below one of the headings for **Work Hours**, **Break Time**, **Other**, or **Vacation**. Once an option is selected, click into the lower portion of the screen into the appropriate time slot. Once the entry has been started, you may make any additional adjustments needed (time or day adjustments, recurring schedule) prior to clicking **OK**. This item will develop the employees work schedule. Other users can view the schedule to see what time(s) an employee has available/unavailable prior to scheduling tours, calls, lease signings, etc.

View Today's Schedule

This button will display all item's scheduled for today for the marketing team. It will display all tasks assigned to any users. Double click onto an event if wanting to see the details associated with it. Utilize the **Day, Week**, **Month**, and **Year** buttons as well as the arrows to the right and left and **Now** to navigate to different days.

To Do List – Report

This button will generate a listing of report options that are available. The options include: **To Do List (All), To Do List User 1**, **To Do List User 2,** and **To Do List User 3**. Select the desired report option and click **Load.** Each report will display the task items assigned to that specific user.

Other

Advertisement Tracking

This button will take you to the Advertising area of Marketing. Always document using a fake Marketing client in this area. Here, you can enter data regarding current advertising that is active, description and costs of the advertising, etc. Click **Print Advertising Graph** to see where the dollars are going for the past 6 months. When finished, click **Sign** to close the screen and return to the Access screen.

Business Contacts

This button will take you to the Business Contacts area where you can enter information for marketing contacts ensuring this data is stored in a central location. Always document using a fake Marketing client in this area. Contact types may include Hospital Discharge Planners, Home Health Agencies, or Physician Assistants at Clinics. Enter any data which you would like on file. When finished, click **Sign** to return to the Access screen. Information in here may be used to generate **Contact Lists** and **Mailing Labels**.

View Messages

This button will take you to the View Messages screen where you can view messages sent internally within ECS. You may see messages in here regarding new admissions or discharges, as well as any notifications sent you via a manual internal message.

ADT/Face Sheet

This button will take you to the ADT/Face Sheet screen for the Nursing Home or Assisted Living. If you need to enter a client's admission data or their Face Sheet once they are admitted to the facility, this allows you easy access to that screen.