Referral Trak Reports Summary

Web Based Reports

Web Based reports should be used by Managers. More powerful reports exist for Program Administrators so they will not typically use web reports except when helping Managers understand referral performance in their offices.

Web Reports pull data based on the Date of Referral Creation so if you have a need to look at incentive or sell/no sell data you should not use this report. The data inside Web Reports can change over time for the same month. If you pull a report on July 1 for June 1 to June 30^{th} of that same year you will likely not see as many referrals sold as you will if you run the report on July 14th. Web reports can be useful for a quick glance at referral activity.

Web Based Reports – based on the date a referral was ***Created***. They provide information on the status of referrals by product, office and user. You need to select a Start and End date for the web reports. The following reports are available to be viewed as a Web Report. These reports do not offer the ability to download them into an Excel file.

Referrals Sent
Referrals Received
Referral User Summary
Referral Product Summary
Referral Date Summary

Incentive Payment Report

The Incentive Payment Report should be used when you need to prepare information to be sent to HR / Payroll to pay employee incentives. You can review each referral that is paid which means you typically only want to run a month or quarter at a time for your date ranges. Otherwise there will be too much data to easily review.

Incentive Payment Report - this report pulls referrals based on the recommended ***Payment Date***, which is established under the Incentive Timing configuration for each individual product. This report does not offer the ability to download into an Excel file.

Search Builder Referral Tool

The Search Builder Referral tool should be used when you want to export raw referral data for building custom reports.

Search Builder: Referrals – this report builder tool provides the ability to select various checkboxes in the "Show" column (the left most column) beside each field that you want to appear in the results of your search. The Action column will contain different types of filters that you can use to control the search. This report builder also allows you to save search criteria for repeated use without having to re-create a new search for the same data that you have searched for previously. This report builder allows you to download the results into an Excel file.

Historical Reports

Historical Reports should be used when you want to analyze referral creation data. Historical reports combine two different types of events (Referral Creation Dates and Sold Date) into a single time context. For creating scorecards the **Historical Reports** should be used**.**

Historical Referral Creation Summary Report Tools

R1. User Summary Report – this report will show historically over a specified range of months the number of referrals created, sold, incentive amount and their business value, displayed by User. The results can be sorted by: total created, total sold, total incentive payments or total business value. This allows for a ranking of the top users based on these criteria.

IMPORTANT NOTE FOR ALL HISTORICAL SUMMARY REPORTS AND DATA PULLS:
For a given month Jan 2006 for example the report includes ALL referrals created from Jan 1 2006 to Jan 31 2006 in the created total.

The sold, payment, and business value fields are calculated based on all Referrals that SOLD within the time frame Jan 1 to Jan 31 2006. NOTE THAT THESE REFERRALS COULD HAVE BEEN CREATED IN JAN 2006 or Dec 2005, Nov 2005, etc.

NOTE ALSO THAT THESE REPORTS CURRENTLY DO NOT LOOK AT INCENTIVES PAID ON REFERRALS THAT WERE INCENTED BUT DID NOT END IN SALES. Contact us if you would like to see these additional fields added.

R2. Branch/Department/Office by Product Summary Report - this report can generate a lot of data since it looks at every product in every branch or office unless you select specific products or branches. We suggest you start with this report by selecting a single product or branch to view.

R3. Branch/Department by Product Category - this report summarizes referral creation by Source Branch/Dept/Office and by Product Category. If you organize your products into useful categories this report can be very powerful as it provides a high level view of where referrals are being created and where the business value is across the product categories.

You may find that you can compare your offices against each other better with this report more easily than with R2 as the data is summarized up one level to Product Category.

Historical Referral Creation Data Search Builder Tools - this report builder tool provides the ability to select various checkboxes in the "Show" column (the left most column) beside each field that you want to appear in the results of your search. The Action column will contain different types of filters that you can use to control the search. This report builder allows you to download the results into an Excel file.

H1. Historical Data: Organization Level
H2. Historical Data: Branch/Department Level
H3. Historical Data: User Level
H4. Historical Data: By Product
H5. Historical Data: Branch/Department AND Product
H6. Historical Data: Branch/Department AND Product Category

Referral Trak System Reports

Referral Trak System Reports should be used by PA users that need to look at exception reports.

Referral Trak System Reports
Orphaned Referrals (Mapping Problems) – displays referrals that need action taken because there is a mismatch between the assigned office and the assigned user.

Deferred Referrals Coming off of Defer – displays referrals that were deferred to a certain date and are schedule to come out of a “deferred status” in 7 days.

Send Email Alerts for Deferred Referrals – this tool will send out email alerts in real time to the employees that are processing the referrals that are coming off of defer.

Session (User Login) Data – displays historical login activity for your entire organization. You may filter the results by session date, login count, activity count and user. You may also export your results to an Excel file. This report can be used to determine which users are and are not using Referral Trak.