

## ClientTrax Product Description

The **ClientTrax System** is a web based software application used to track and process data for agencies that provide community based services and home based services to clients. The system is easy to use and utilizes standard internet browser technology for its user interface. The backend of the system utilizes MSSQL for data creation, updating and deleting.

The **ClientTrax System** can track information on clients, staff, families, organizations and various other program related information. ClientTrax has a work flow engine and event triggers that can help your organization ensure it's on time delivery of services. The system includes a web service for integration with other programs.

**Custom Data Models on ClientTrax** - The custom data model format in ClientTrax allows us to respond dynamically to various data formats and models. This technology provides us with the ability to incorporate customer specific note formats, billing entries and more into their ClientTrax system, therefore providing a, truly, customizable, flexible software platform to make their business more efficient.

The **ClientTrax System** tracks but is not limited to the following information:

People	Cases	Services	Organizations
Demographic Data	People Involved	Case Worker	Characterizations
Contacts	Case Status	Referrals	Role
Placements	Services Provided	Authorizations	Contacts
Key Occurrences	Authorization Dates	Dates of Service	People
Relationships	Progress Notes	Level of Care	Flags
Documents	Documents	Rates	Pictures
Cases	Case Notes	Requirements	Documents
Accounts	Case Relationships	Travel To and From	Accounts
Diagnosis	Organizations Involved	Maximum Dosage	
Clinical Items /Treatment Plans	Clinical Items /Treatment Plans	Minimum Dosage	
Invoicing and Payments	Assessments	Unit Plans	
Assessments	Flags	Invoicing	
Flags	History	Documents	
Pictures	Case Priority	Restrictions	
Characterizations	Case Type	Status	
Incidents	Case Category	Unit Plans	
	Case Discharge Reason		

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Other Features provided by the ClientTrax System

<b>Impersonate</b>	System administrators and supervisors can be given the impersonate feature which allows them to impersonate another user on ClientTrax. This feature allows a user to see the system exactly as the other user sees it.
<b>Multiple System Access</b>	ClientTrax allows larger organizations who want separate systems for different programs a single user login and password for all of the systems and easy switching between systems.
<b>Event Triggers</b>	This feature allows organizations to have the system trigger an event to happen based on a function being performed on the system. For example, when staff enters an incident the system can notify another staff of the incident and/or request that staff to complete a function on the system.
<b>Work Flow Engine</b>	The work flow engine can perform functions based off of a predefined schedule, user request or based off of event trigger. An example of a predefined schedule would be, emailing financial reports every morning to senior management staff. Heavy processing functions are passed to the work flow engine to relieve processing delays on the user application.
<b>Web Service</b>	ClientTrax's web service allows for the interfacing to other programs and technologies.
<b>Tasks</b>	User can enter their own tasks or system event triggers can automatically create tasks for cases, clients and/or users.
<b>Reporting and Exporting</b>	The ClientTrax system has a robust reporting engine that can create word documents, spreadsheets and html content. The reporting engine can provide case specific reports, productivity reports, outcome reports, invoicing reports and various other types of reports.

Benefits of the ClientTrax System

- The ClientTrax System is a user friendly system that greatly reduces duplicate data entry. The data entered into ClientTrax is reused where needed, eliminating staff from having to retype the same piece of information.
- The system replaces hard to manage and labor intensive spreadsheets that are commonly found in organizations.
- ClientTrax is an affordable web based system which reduces the cost of IT for agencies.
- ClientTrax gives caseworkers more time to serve children and families, thanks to intuitive design that simplifies service documentation, data management and reporting. The system allows administrators to focus more on quality and growth than the day to day details of their program.
- The system is configurable to state-specific regulations.
- ASIware provides world class customer service.

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