BLAZE SSI TECH Sheet

PENTRAK System

The **BLAZE SSI PENTRAK System** supports case and personnel management for TPAs. **PENTRAK** is an MS SQL Server data base which includes a plan master file to track plan data; an activity master file to track the progression of plans through the annual administration cycle; and a personnel master file to track and compare productivity among administrative personnel.

1. APPLICATION FEATURES

+ Sort/select/print plans by field
+ Create 'tickler' files to prompt action by administrative personnel
+ Create management information reports
+ Create time and billing reports for one plan, a sub-set of plans or all plans
+ Create invoices, account statements and balance sheets
+ Create 'free-form' reports
+ Track and compare plan income, costs and services for multiple years
+ Track and compare productivity of individual administrators
+ Track and compare productivity of branch offices
+ Support an unlimited number of plans, activities, administrative personnel
+ Support user-defined factors and billing formulas for invoicing
+ Support user-defined and pre-designed administration activities
+ Support multi-year activity records

2. USER INTERFACE

+ Easy and familiar Windows user interface
+ Introductory Guide and comprehensive context sensitive 'HELP' documentation
+ Automated data validation and entry error trapping and data comparison utility
+ Numeric, graphic, text-based, basic and custom format reports
+ Enter, edit and archive data files
+ Electronic acquisition of data
+ Reports automatically prepared in .pdf file for screen view, hard copy and email
+ Electronic interfaces with **BLAZE SSI** and other systems on any platform

3. CUSTOMER SUPPORT

+ System updates for government regulations included in maintenance service
+ Unlimited phone, fax and email HelpLine support included in maintenance service
+ National and regional user seminars
+ Basic and customized training seminars
+ Systems consulting and custom programming available

4. HARDWARE SUPPORTED

+ Computer with a Pentium or higher processor
+ 128MB RAM (or more) available to this system
+ MS Windows 2000 Professional or Windows XP Professional Operating System
+ Network compatible

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PENTRAK System

DETAILS

Selection of data for sorting and report creation may be made on any data element in a master file, for example, plans may be sorted by plan valuation or effective date, plan type, funding method, attorney, zip code, assigned support person or any data element selected by the user. Sorting may be made on any combination of the data in each master file.
Activities may be user entered or created automatically. Multiple activities may be open simultaneously for a plan. A pre-defined group of activities which represent the common functions to be performed for a plan during a typical one year cycle may be opened automatically.
'Tickler' reports are easily created to prompt action on the part of the assigned administrative support person. Typical reports are lists of 5500 forms due within a certain period, census requests mailed but not returned by the client, valuations to be performed by a certain date.
Invoices for clients with detailed time and activity notes may be printed or reprinted with follow up letters of increasing intensity.
Management information reports may be produced to indicate the level of activity of an individual administrative support person, the number of cases assigned, the number of activities completed and incomplete.
Free form reports are easily created and saved by the user with the supplied report function. No programmer experience is required to prepare free form reports.

CURRENTLY AVAILABLE PRE-FORMATTED REPORTS

PLAN LISTS

- All plans, or a user-selected subset of plans
- Client-ready 'Plan Renewal Package'
- Plans assigned to specific personnel
- Plan status report
- 5500 status report
- Address labels

TRACKING REPORTS

- Sorted and listed by the user's selected data elements
- All activities for a specific administrative support person
- All invoiced activities for a specific administrative support person
- All invoiced activities for a specific agency with agent subtotals
- All activities with target completion dates

BILLING REPORTS

- Create/Print an invoice for a plan (or reprint an existing invoice)
- All receivables for a plan
- Past due follow-up notices for a plan
- 'Balance' sheet including invoices/payments/credits for a plan
- Statement of Account
- Apply payments to all or a user-selected list of open invoices
- Receivables 'aging' list