BLAZE SSI TECH Sheet

PENTRAK System

The **BLAZE SSI** **PENTRAK System** supports plan and personnel management for TPAs. **PENTRAK** uses an MS Access data base with a plan table to track plan data; an activity table to track the progression of plans through the annual administration cycle; and a personnel table 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 custom reports and database queries
+ 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 or administrative groups
+ 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
+ Reports automatically prepared in .pdf file for screen view, hard copy and email
+ Electronic interface with **BLAZE SSI EBPII System**
+ Designed for multi-user operation

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

+ MS Windows XP Pro; MS Vista (Business or Ultimate); or Windows 7 Operating System
+ Computer sufficient to support the OS; plus 1GB RAM (or higher) for the application
+ Sufficient d storage to support user-created data sets
+ MS Internet Explorer 8 or higher; Internet connection required
+ Free Adobe Reader version 6 or higher

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PENTRAK System

DETAILS

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. Activity types are user-customizable.

'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.

Custom report formats are easily created and saved by the user with the supplied report function, including typical sorting and selection options. No programmer experience is required to prepare free form reports.

Optional selection of data for sorting and report creation using MS Access database tools may be made on any data element in a table, 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 table.

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