

ClientTrax

ClientTrax

The ClientTrax System is a web based software application used to track and process data for agencies that provide social services in our communities.

ClientTrax

Our partners serve clients in the following programs:

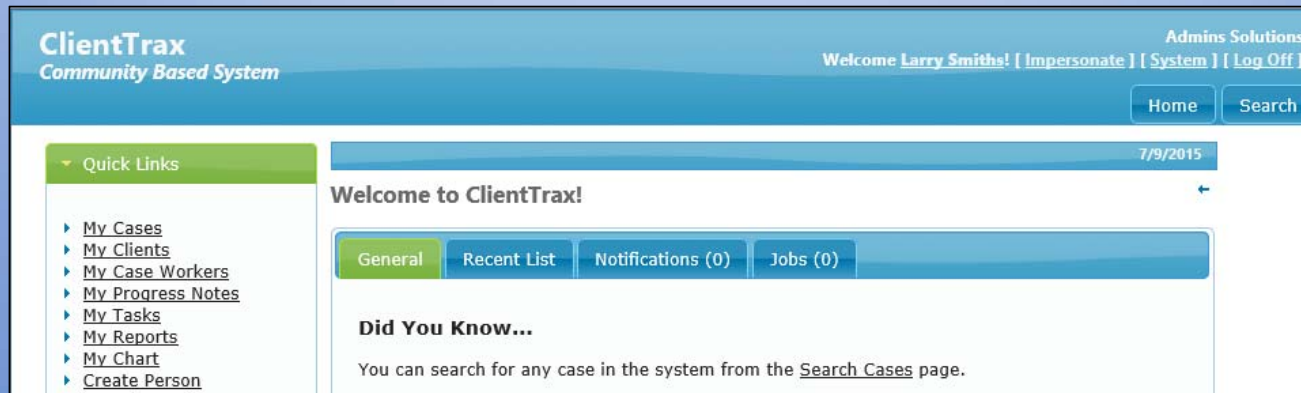
- Independent Living
- Juvenile Justice Diversion
- Home Based Services
- Fatherhood Initiatives
- Home Based Services
- Mental and Behavioral Health
- Community Based Services
- Therapy and Counseling
- Various other Programs

ClientTrax

Our partners range from agencies serving 10 to 20 clients a month on the low end to over 3500 clients a month on the high end.

ClientTrax

The system is easy to use and utilizes standard internet browser technology for it's user interface.

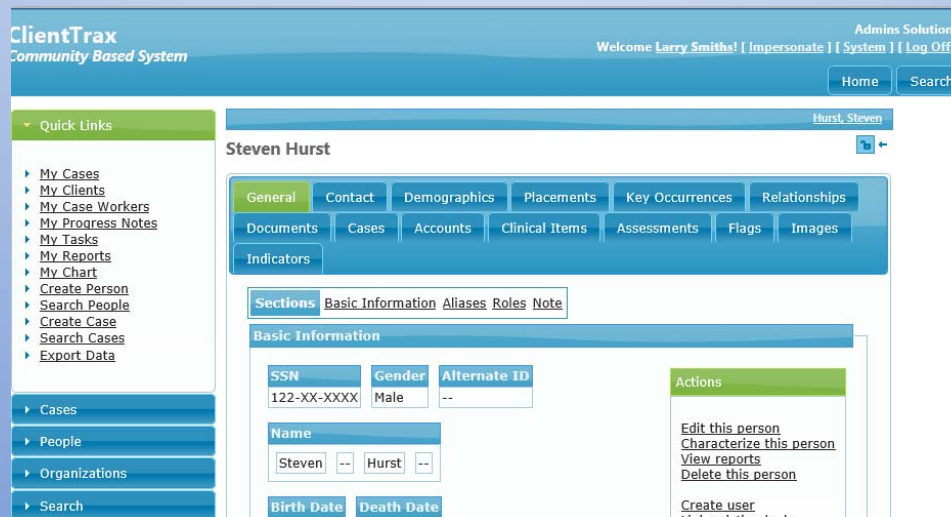


ClientTrax

The backend of the system utilizes MSSQL for data creation, updating and deleting.

ClientTrax

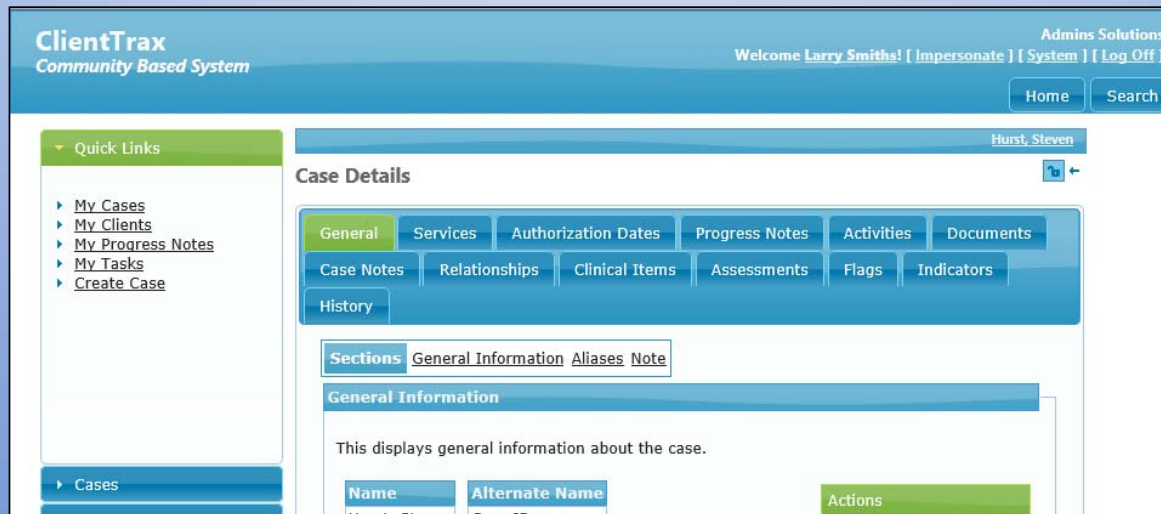
The ClientTrax System can track information on people:



The screenshot displays the ClientTrax web application interface. At the top, it shows the system name 'ClientTrax Community Based System' and a user welcome message 'Welcome Larry Smiths! [Impersonate] [System] [Log Off]'. A navigation menu on the left includes 'Quick Links' and 'My Cases', 'My Clients', 'My Case Workers', 'My Progress Notes', 'My Tasks', 'My Reports', 'My Chart', 'Create Person', 'Search People', 'Create Case', 'Search Cases', and 'Export Data'. The main content area shows a profile for 'Steven Hurst' with tabs for 'General', 'Contact', 'Demographics', 'Placements', 'Key Occurrences', and 'Relationships'. Below these are sections for 'Documents', 'Cases', 'Accounts', 'Clinical Items', 'Assessments', 'Flags', and 'Images'. The 'Basic Information' section includes fields for 'SSN' (122-XX-XXXX), 'Gender' (Male), and 'Alternate ID' (--). The 'Name' field shows 'Steven Hurst'. There are also fields for 'Birth Date' and 'Death Date'. An 'Actions' menu on the right includes 'Edit this person', 'Characterize this person', 'View reports', 'Delete this person', 'Create user', and 'Link existing login'.

ClientTrax

The ClientTrax System can track information on cases:



The screenshot displays the ClientTrax web application interface. At the top left, the logo reads "ClientTrax Community Based System". The top right shows a user greeting: "Welcome Larry Smiths! [Impersonate] [System] [Log Off]" and navigation buttons for "Home" and "Search". Below the header is a "Quick Links" sidebar with options: "My Cases", "My Clients", "My Progress Notes", "My Tasks", and "Create Case". The main content area is titled "Case Details" and features a user profile for "Hurst, Steven". A horizontal menu includes tabs for "General", "Services", "Authorization Dates", "Progress Notes", "Activities", and "Documents". Below this, another row of tabs includes "Case Notes", "Relationships", "Clinical Items", "Assessments", "Flags", and "Indicators". A "History" tab is also visible. Underneath, a "Sections" bar highlights "General Information", with "Aliases" and "Note" as sub-sections. A text box states: "This displays general information about the case." At the bottom, a table header is partially visible with columns for "Name", "Alternate Name", and "Actions".

ClientTrax

The ClientTrax System can track information on Services:

Setup Service

Service Rates Requirements Travel Maximums Note

This allows you to specify the duration of a service for a person and organization.

Client: Steven Hurst Case Worker: Larry Smiths Service: Drug Prevention

Organization: Adams Counseling

Begin Date: 1/1/2014 Finish Date: Authorization: 12345

Save Close

Setup Service

Service Rates Requirements Travel Maximums Note

This allows you to specify the rates and unit plans for the selected activities.

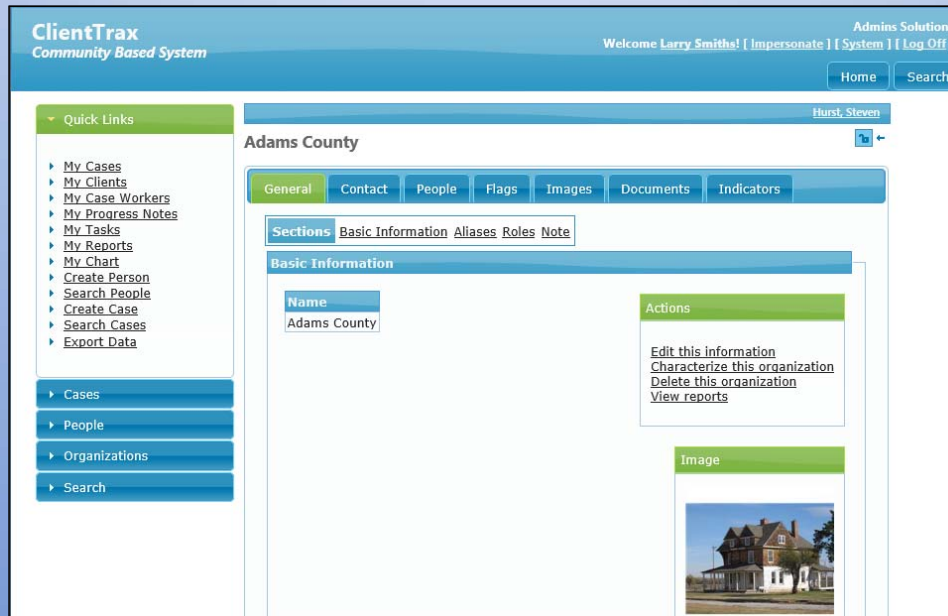
Activity	Rate	Unit Plan	Billable	Restrict
<input checked="" type="checkbox"/> Administrative	135.00	Per Month	Yes	No
<input checked="" type="checkbox"/> Cancellation	25.00	No Show Plan A	Yes	No
<input checked="" type="checkbox"/> Home Visit	135.00	Hourly Plan A	Yes	No
<input checked="" type="checkbox"/> No Show	45.00	Hourly Plan B	Yes	No
<input checked="" type="checkbox"/> Office Visit	95.00	Hourly Plan B	Yes	No
<input checked="" type="checkbox"/> Other			No	No
<input checked="" type="checkbox"/> Phone	45.00	After Hours	Yes	No

Retrieve default rates

Save Close

ClientTrax

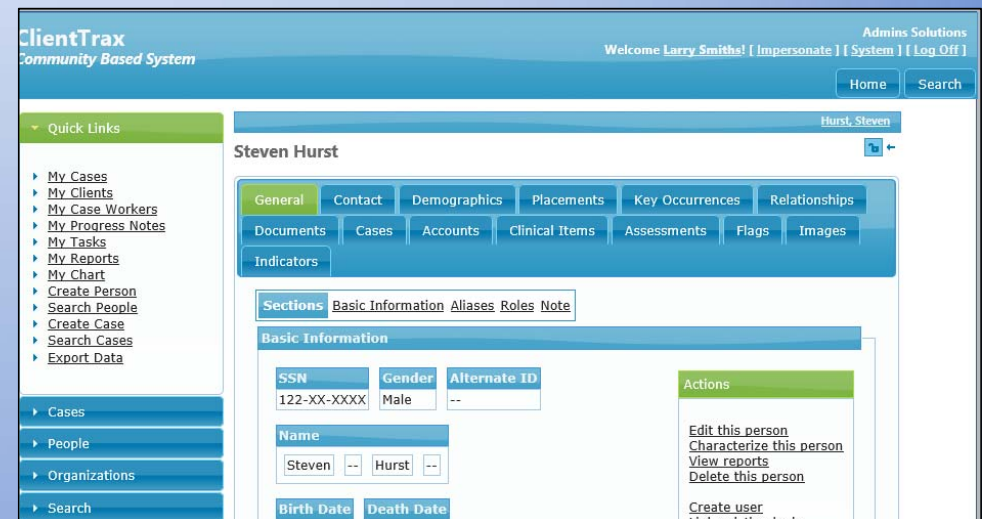
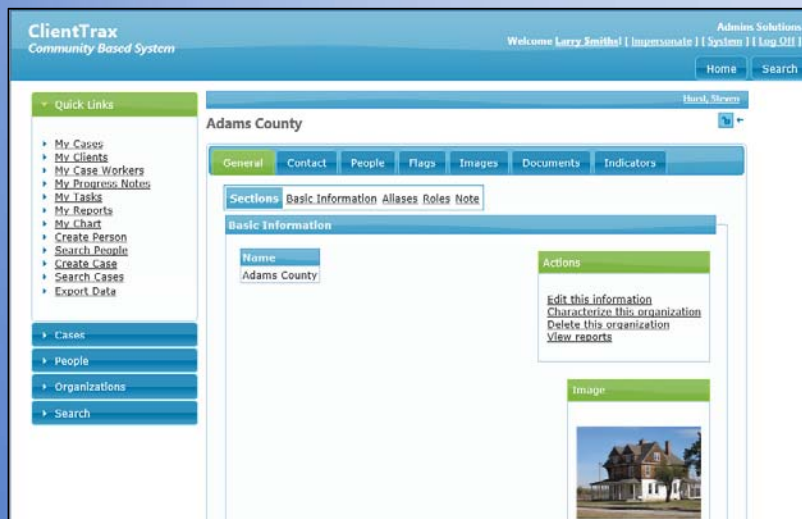
The ClientTrax System can track information on organizations:



The screenshot displays the ClientTrax web application interface. At the top, the header includes the ClientTrax logo, the text "Community Based System", and user information: "Welcome Larry Smith! [Impersonate] [System] [Log Off]". There are "Home" and "Search" buttons in the top right. A navigation menu on the left lists "Quick Links" such as "My Cases", "My Clients", "My Case Workers", "My Progress Notes", "My Tasks", "My Reports", "My Chart", "Create Person", "Search People", "Create Case", "Search Cases", and "Export Data". Below this are buttons for "Cases", "People", "Organizations", and "Search". The main content area shows the profile for "Adams County". It has tabs for "General", "Contact", "People", "Flags", "Images", "Documents", and "Indicators". Under the "General" tab, there are sections for "Basic Information", "Aliases", "Roles", and "Note". The "Basic Information" section shows a "Name" field with the value "Adams County". To the right, an "Actions" box contains links: "Edit this information", "Characterize this organization", "Delete this organization", and "View reports". Below the actions is an "Image" section with a placeholder image of a large, multi-story building.

ClientTrax

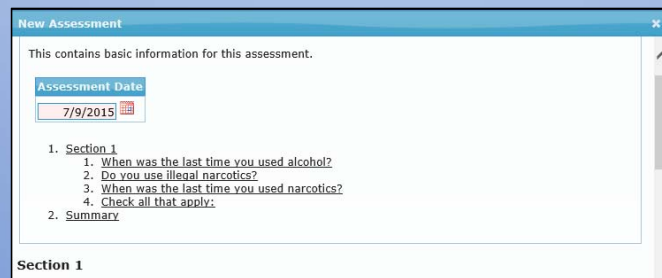
As you can see by now the user interface is very consistent which reduces the learning curb for your staff.



ClientTrax

ClientTrax utilizes custom data models. The advantage of custom data models are:

- allows us to respond dynamically to various data formats and models.
- 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.



New Assessment

This contains basic information for this assessment.

Assessment Date
7/9/2015

1. Section 1
1. When was the last time you used alcohol?
2. Do you use illegal narcotics?
3. When was the last time you used narcotics?
4. Check all that apply:
2. Summary

Section 1

ClientTrax

Some of the standard functions in ClientTrax.

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		

ClientTrax

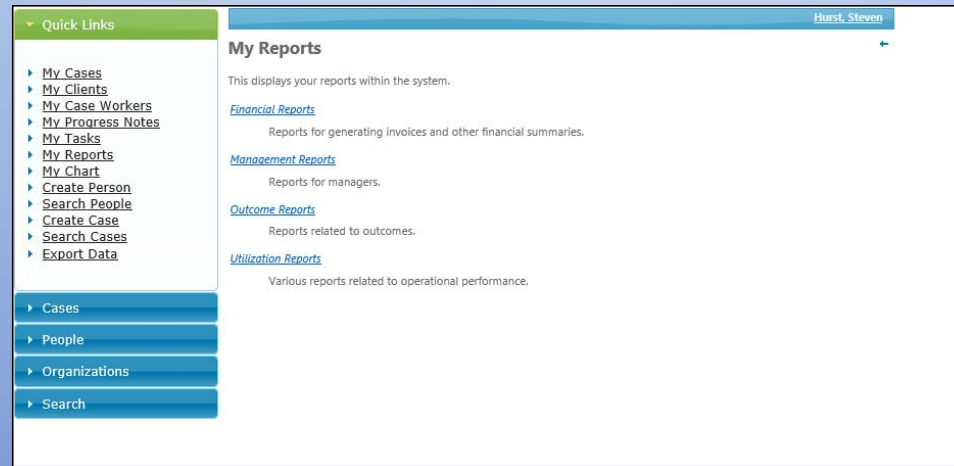
Other features of ClientTrax.

Impersonate	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.
Multiple System Access	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.
Event Triggers	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.
Work Flow Engine	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.
Web Service	ClientTrax's web service allows for the interfacing to other programs and technologies.
Tasks	User can enter their own tasks or system event triggers can automatically create tasks for cases, clients and/or users.
Reporting and Exporting	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.
SMS	ClientTrax allows users to send text messages to people in the ClientTrax system.

ClientTrax

Reporting on ClientTrax.

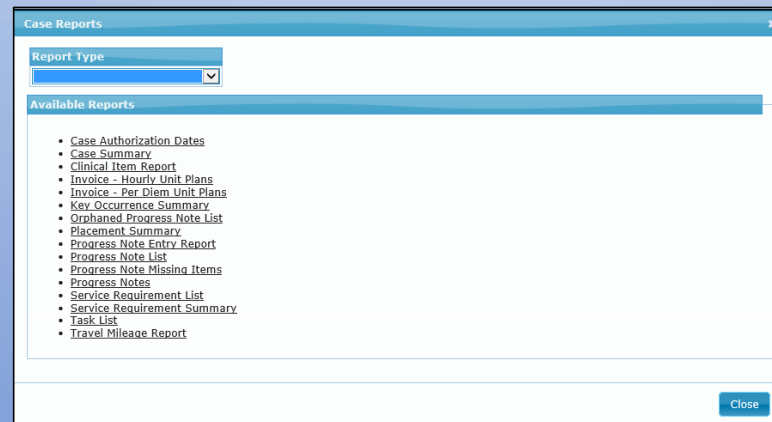
Agency Reports - The system provides management reports, financial reports, outcomes reports and utilization reports.



ClientTrax

Reporting on ClientTrax.

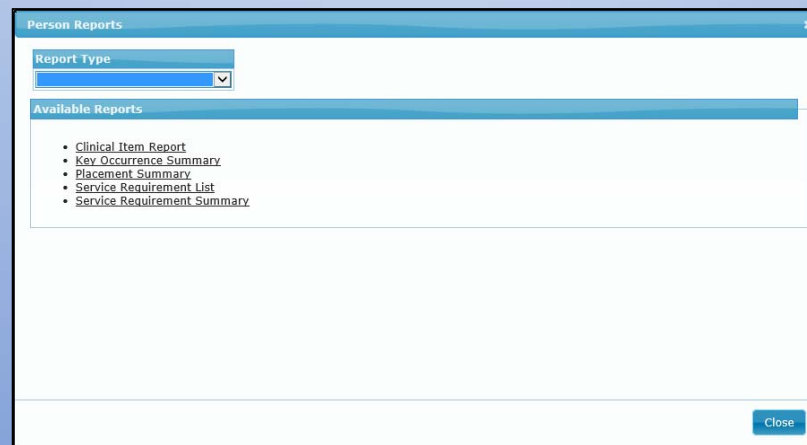
Case Reports - The system provides authorization reports, case summary reports, clinical item reports, key date reports, placement summary reports, service requirement summary reports and various other case reports.



ClientTrax

Reporting on ClientTrax.

People Reports - The system provides clinical item report, key date reports, placement summary reports, service requirement list reports and various other people reports.



ClientTrax

Reporting on ClientTrax.

Organization Reports - The system can be configure to run reports at an organization level.

ClientTrax

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

Benefits of the ClientTrax System. (continue)

- 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.



ClientTrax

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Or

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www.asi-ware.com

