



Tracking At-A-Glance®

Case Management and Performance Tracking Software

Features:

- Real-time, web-based solution (accessible anywhere in the world with an Internet connection)
- User-friendly, easy-to-read screens including Activity Log, Caseload Triage, General Information, Household Records, Social Network, Income and Assistance, Education, Employment, Contracts of Participation (CoP), Individual Training & Services Plan (ITSP), Work History, Referrals, Milestones, Resident Notes, and more
- Comprehensive Needs Assessment that tracks initial needs (creating a baseline) and current needs to show resident progress in employment, job training, education, transportation, childcare, health, housing, finances, legal, and other areas
- Ability to save and compare historical risk assessment records
- Creation of the ITSP from the Needs Assessment
- Tracking of Section 3 placements
- Dedicated e-mail function which allows users to quickly compose and send e-mail messages with up to three attachments to an individual or a group
- Optional FSS Logic Model Report with the services/activities and outcomes as defined by HUD
- Grant reports in the Grant Module are automatically generated and dynamically updated every time a reportable entry is made for a resident attached to the grant
- Budget Module auto-calculates disposable income based on income and expenses
- Homeownership Module tracks credit and asset information, co-borrowers, loan details, property information, appraised value, and grant and tax credits
- Relocation Module tracks multiple relocations, preferences, rent and utility expenses, documents, loans, payments, and auto-fills and auto-calculates several HUD forms
- The Survey Module can be used to create an unlimited number of surveys with a variety of question types, and features a detailed report that can be exported
- Community Service function for tracking community service hours and exemptions
- Multiple levels of security such as auditors, guests (service providers), staff, site managers and corporate users, provide access only to the information users need
- Robust internal reporting without the need for third party software. Every field in the database is "searchable" and can generate a custom report within seconds
- Performance is easily measured by activity (enrollments and completions), service provider, case manager, location and/or any other search criteria in the database
- Automatic tracking of dollars spent (whether actual or in-kind), by service, by provider, by resident, by funding program, by date, etc.
- Maintenance area that alerts users of "red flag" areas in the system that need attention
- Customization section allows the Site Administrator to customize all drop-down lists
- Ability to attach scanned documents, external documents and/or letters created directly in the system to the appropriate resident record
- Creates mailing labels based on the results of any user's custom database search

For a demonstration of Tracking At-A-Glance®, please contact:

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