**BASIC REASONS TO USE A COMMON CLIENT TRACKING SYSTEM**

**1. Easy Quarterly and Annual Reports**

Data is collected as you help clients so that there is zero additional work required when someone asks you for a report.

Quarterly and Annual reports, with information required by our National Council (and by your District Council!), can be produced with a single click.

**2. Better Client Service**

A file is kept for each client you serve, tracking history of past assistance you have given (and denied), so that when fresh requests arrive you have complete information available.

Active (in-progress) requests are tracked from the moment they arrive via intake, through assignment to members, in-progress updates for long-running requests, and eventual write-up of results.  This helps better conference teamwork as everyone knows what is going on.

Members who need to hand off cases before they are done (eg: need specialized skills, or member leaves on vacation) can be easily reassigned so the ball isn't dropped.

**3. Treasurer Integration**

Treasurers can use the system to track their finances, recording deposits and payments, and reconciliations to monthly bank statements.

Payments can be explicitly linked to pledges that members make.  Client files then show clearly which pledges have been paid, including full payment details in case questions arise.

Reconciliation reports help assure that your records track what the bank thinks, and identify aging payments where checks might have been lost and need to be reissued or cancelled.

And, you guessed it, as treasurers record deposits and payments all information needed for annual reports is gathered right then.  No follow-up work is required later when someone requests a report.

Treasurers Reports can be generated with a single click, containing all information required by our National Council (and your District!).  Reports can be run over current or last month, quarter or fiscal year, or any custom date range you choose.

**4. Member Roster and Secure Access**

Member Rosters are maintained on the system.  Most members will also be issued individual passwords so they can log in and use the system directly to do their work, but your roster can also contain members who don't use the system.

Access levels include: none, user (for most members) and administrator.

Access is via SSL-secure connections to prevent eavesdropping on your internet connection.

Demographic information (age group and ethnicity) can be tracked so again you can run reports required by National with no further work.

**BENEFITS TO THE NEW (FUTURE) SYSTEM OVER THE OLD (PAST) SYSTEM**

The most basic benefit is that all new development and improvements are happening in the new system.  The old system is being maintained at its current level for existing users, but is not open to new conferences being added and is not having new features delivered.

Features that have been added to the new system in recent years include:

**Central Dispatch / Helpline**

Portal for a central location (eg: Council office) to take requests for help and dispatch them to conferences by entering them directly into the system.  Conferences can get email notifications.  Fresh requests arrive in the Active File, with no further data input required.

**Sharing Among Conferences - Better Client Service**

Conferences can now search client files across the district, eg: to find if other conferences have helped a neighbor who is approaching you for service.  This can help avoid duplication and help conferences better coordinate their efforts.

**Updates to match latest National Reports**

Produces reports to match the latest 2020 edition of National's Conference Quarterly/Annual Reports.

**Better Client File Notes**

Notes are now structured so you can see exactly who wrote what, and when.  No longer a single undivided paragraph.

Can also control note privacy, in case you have information that should remain within the conference and not be visible to neighboring conferences.

**Languages Spoken**

Serve clients better by flagging ones with limited English.  Regardless of English proficiency you can note the client's preferred language, but this is obviously of most help for ones with limited English.

Member profiles now list languages spoken by each member, to help you assign cases to members who can speak a client's language.

Reports under development to help us assess language trends and note shortfalls so we can mitigate (translation services, recruit volunteers, etc).

**And more...**

Features are added multiple times a year, to help us deliver better service and be more accountable to grantors and supporters.

Thanks,

Joseph