

# **Client Intake Module by SERVtracker**

SERVtracker is a multi-user software database that allows you to easily track and manage ALL of your client information and ALL the detailed service records those clients will receive. SERVtracker helps you manage multiple services within one database. This allows you to easily manage information with the simplistic flow and design that has been developed specifically **for** senior service agencies, **by** senior service agencies.

Within SERVtracker there are over 500 client specific data fields to help you manage information that includes personal information, emergency contacts, income by category, assets by institution, programs a client is receiving, medical information, Medicare and Medicaid identification numbers, separate mailing addresses, grant/funding source by service, NAPIS (ADL, IADL, and NRA) required information, plus much more!! All of this can be entered by individual client, or you can associate family id's to allow family grouping.

Our Accounting module allows you to create invoices for Co-pay, private pay and general funding sources. An accounts receivables section allows you to enter receivables by service against each invoice. You can generate aging reports, agency statements, receivables history, unapplied cash and a variety of other accounting specific reports.

Not only does SERVtracker give you all of the data entry capabilities that you would ever want for your clients', we also provide you over 600 reports with detailed information. Reports are broken down by provider, service & funding source. There is a general reporting area that allows you to print information about client demographics, unduplicated client counts by service and funding source, and summarized information about the services provided. There is also a custom query builder that allows you to extract most information you want out of the database and push it into an Excel spreadsheet. Accessible Solutions offers customization when additional reports are needed.

## **Features**

- Tracking of all client information, including over 500 client data specific fields. These are broken into personal information, emergency information, and all NAPIS, ADL's, IADL's and NRA's.
- Services that each client is receiving and the ability to customize who, what, how, and when each service is being provided.
- Track household composition, household quantities and monthly incomes that automate the determination of clients' eligibility.
- Fields for the entry of any disabilities or mobility problems the client may have.
- Storage of primary and secondary emergency contacts, along with hospital preferences, Dr. information and other medical related fields.
- Grant Monitor – Allows you to enter grant/funding sources for each service provided, by units and dollars per unit. As service records are posted, you will be able to report on the usage of your grants and funding sources and better manage their use.
- Generation of bar coded id badges for all clients.

## **Benefits**

- Access ALL client demographical and service related data, real time across departments.
- Best in class software solution developed by senior service providers for senior service providers.
- Easy and efficient operations that are streamlined based upon proven workflows.
- Increased employee satisfaction using a product streamlined to make daily tasks simple.
- Accurate and real time funding source manager allows for better utilization and management of resources.
- Scalability of product supports single system users as well as complex networks.
- Increased productivity frees resources to be applied where needed, helping seniors.



Accessible Solutions, Inc.  
PO Box 541489 Merritt Island, FL 32953  
Tel. 321-454-6944 Fax. 813-283-7888  
[www.accessiblesolutions.us](http://www.accessiblesolutions.us)