



# DGEM Client & Task Tracking System (CATTS)

Available via ASC's Document Generation & Management (DGEM) Platform

## A WEB-BASED ORGANIZATIONAL TOOL BUILT FOR THE RETIREMENT PLAN PROFESSIONAL

A central location for all your data, workflow and distribution tracking, automated data collection and more!

ASC offers two complementary CRM & Workflow Systems: CATTS (Client and Task Tracking System) and PensionPal. Track your clients, contacts, cases, participants, associated brokers, sales agents and accountants. Both systems offer customizable workflow and task management fields, on-demand or scheduled reports, letter and email merge capabilities and access to all plan information with the click of a mouse. ASC's ERISA experienced Support Team provides ongoing support including help with implementation. Contact ASC Sales at sales@asc-net.com or (800) 950-2082 x1 to discuss and find the right solution for your business.

### AT-A-GLANCE: SEE THE BIG PICTURE! & MONITOR ALL YOUR PLANS!

Integrated within ASC's product suite for "Real Time" data flow between systems, allowing you to see up-to-date and comprehensive status of all your plan sponsor and plan information.

### ORGANIZED AND AUTOMATED

- All in one place: clients, contacts, cases, & participants plus the option to individualize with unlimited custom fields
- At a glance views of your filing deadlines, events, tasks and staff schedules
- Create and generate a variety of reports on demand or create reports to generate and deliver to users on a regular schedule
- Track annual or daily workflow with Case or Company projects and staff role assigned tasks
- Manage case workflow by converting internal checklists to customized project templates or utilize generic project templates

### TRACK PARTICIPANT DISTRIBUTIONS & OTHER EMPLOYEE DATA

### CATTS AND PLAN SPONSOR CONNECT COMMUNICATIONS & YEAR END DATA GATHERING

- Batch create customized Forms and store as Rosters for email delivery
- Batch create DGEM Pre-populated Forms and Document packages and store as Rosters for email delivery
- Publish CATTS Forms, DGEM Pre-populated Forms and Documents to the Plan Sponsor Connect Web Portal
- Gather Census and Questionnaire year end data with CATTS and the Plan Sponsor Connect Web Portal

