



Client and Task Tracking System (CATTS)

Improve efficiency through an organizational tool built for the TPA Professional

All the information a pension professional needs to keep track of is in one place. Additionally, CATTS is part of our Document Generation & Management (DGEM) System which integrates ASC's Plan Document, 5500 and DC/401(k) Systems.

Accessible and visible:

At a glance views of your filing deadlines, events, tasks and staff schedules

All in one place - clients, cases & contacts

Produce a variety of prepared reports or create custom reports

Create unlimited custom fields

Keep track of projects and tasks by client and by administrator

Manage case projects and their associated tasks by using project templates or creating your own custom templates

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Home Companies Cases Contacts Reports Projects Forms

Welcome: Admin

Create New... [v]

Recent History

- Casco Bay Seafood, Inc. 401(k) Plan

Recent Searches

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September 2013

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Showing 2 Days | See 1 Week | See 2 Weeks

MY CALENDAR

Subject	Associated With	Action
Monday 09/09/2013		
TASK DUE	Follow up with Auditor for K-1 Casco Bay Seafood, Inc. 401(k) Plan	Edit Del
Tuesday 09/10/2013		
10:00AM-11:00AM	Staff Meeting	Edit Del

MY EVENTS

Scheduled Subject Associated With Action

View More Events

MY TASKS

Due Date	Subject	Project	Associated With	Action
9/4/2013	Corporate Resolution	Plan Termination Checklist	Alices Restaurant 401k Plan	Edit Del

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New Report: Step 1 of 4

Create New... [v]

Recent History

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Report Information

Create From Template: Overdue Tasks Report by Staff Member

Report Type: None

Report Name: Client Contacts

Description:

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Pre-populated Forms

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Case Results

4 Star Plumbing, Inc. 401(k) Plan

A1 Long Island Manufacturing 401(k) Plan

ASC Company Cash Balance Plan

Alices Restaurant 401k Plan

Capital Investment Cash Balance

Casco Bay Seafood, Inc. 401(k) Plan

CGM 401k plan

Gold International 401k Plan

James Stewart Racing 401(k) Plan

Liz's 401k Plan

AVAILABLE FORMS

- ADP Refund Ltr.doc
- Annual Census Request Notification 1.doc
- Annual Questionnaire.doc
- Census Information Reminder.doc
- New Client Welcome Letter.docx

Generate Doc | Generate Doc Files | Generate PDF | Email Doc

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Manage Projects

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NON SCHEDULED PROJECTS

Project Name	Related to Case	Action
Annual Administration - 2013	True	Schedule Edit Del

SCHEDULED PROJECTS

Project Name	Cases	Case Selection Criteria	Scheduling Criteria	Expiration Date	Action
Plan Termination Checklist	1	Selected Cases	9/3/2013	9/3/2014	Stop Project

COMPLETED PROJECTS

Prepare Customized letters, emails and forms