



Client and Task Tracking System (CATTS)

IMPROVE EFFICIENCY THROUGH AN ORGANIZATIONAL TOOL BUILT FOR THE TPA PROFESSIONAL

CATTS offers pension professionals a system to track workflow as well as a place to store plan and contact information in one place. CATTS is part of our Document Generation & Management (DGEM) System which integrates with ASC's Plan Document, 5500 and DC/401(k) Compliance Systems.

ACCESSIBLE AND VISIBLE:

All in one place – clients, cases & contacts 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

Prepare Customized letters, emails and forms

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Home Companies Cases Contacts Reports Projects Forms

Welcome: Admin

Create New

Recent History

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

Recent Searches

-
-
-

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
Showing 2 Days See 1 Week See 2 Weeks			

MY EVENTS

Scheduled	Subject	Associated With	Action

View More Events

MY TASKS

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

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Report Information

Create From Template: Overdue Tasks Report by Staff Member

Report Type: None
Case Listing by Plan Type
Client Contacts
Overdue Tasks Report by Staff Member
Project Status Report

Report Name: [Text Field]

Description: [Text Field]

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Pre-populated Forms

Create New

If you send an email, the "from" address will be authamp@asc-net.com. Contact support@asc-net.com to use your company email address.

CASE RESULTS

Case Name	Action
4 Star Plumbing, Inc. 401(k) Plan	Select All None
A1 Long Island Manufacturing 401(k) Plan	
ABC Company Cash Balance Plan	
Alices Restaurant 401(k) Plan	
Capital Investment Cash Balance Plan	
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

- ACF Return Ltr.doc
- Annual Census Request Notification 1.doc
- Annual Questionnaire.docx
- 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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NONSCHEDULED 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