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ParkereSSe ClientTracking Application (PS.CT)

The ParkereSSe ClientTracking application, PS.CT, manages client and plan administration workflow and status data in a central database with user functions tied to administration processes to facilitate plan status review and update.

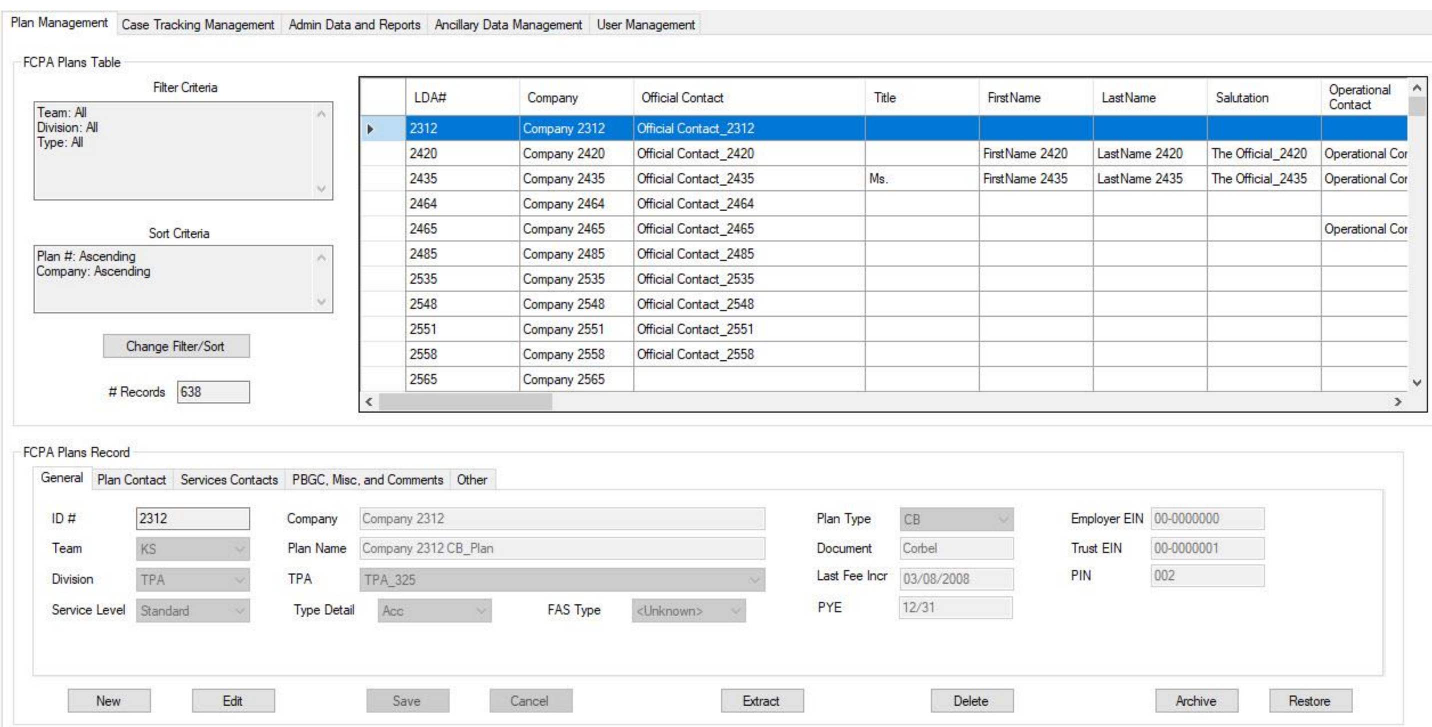
PS.CT is a multi-user application typically installed on a network server. A login is required to access application functions; user entitlements tailor function access at the user level.

The following sections provide information on key components of PS.CT.

Plan Management

The 'Plan Management' view maintains general information about the client plans including:

- Company information
- Plan information
- Internal assignments (Team, Division, Service Level)
- Contacts: Plan, Advisor, Attorney, Accountant
- PBGC information



Plans can be edited, added, deleted, or archived (and restored on demand).

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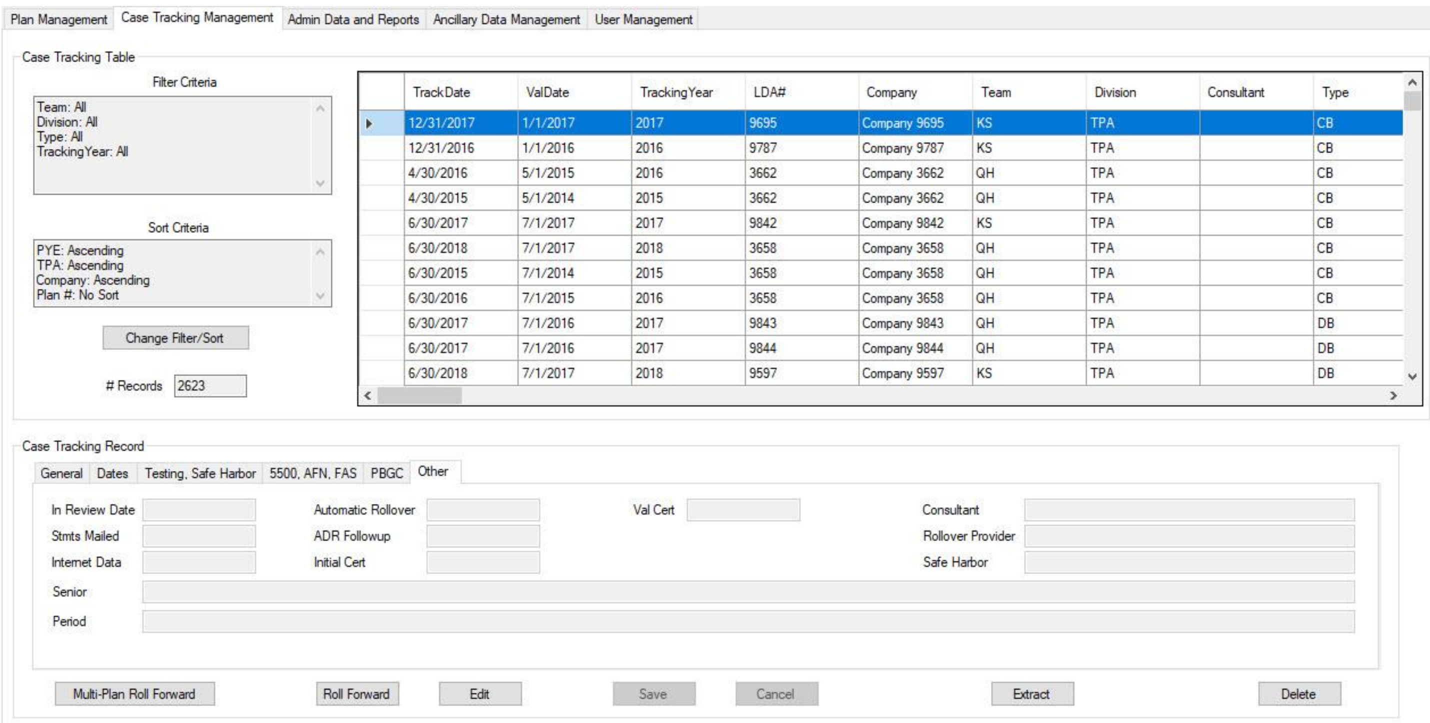
Client Tracking Management

The 'Client Tracking Management' view maintains workflow information at the Tracking Year level for annual plan administration. This view provides access to all managed data; 'Admin Data and Reports' functions, described later, provide subsets of this information for a focused, workflow process-oriented view.

'Client Tracking Management' data include workflow information for:

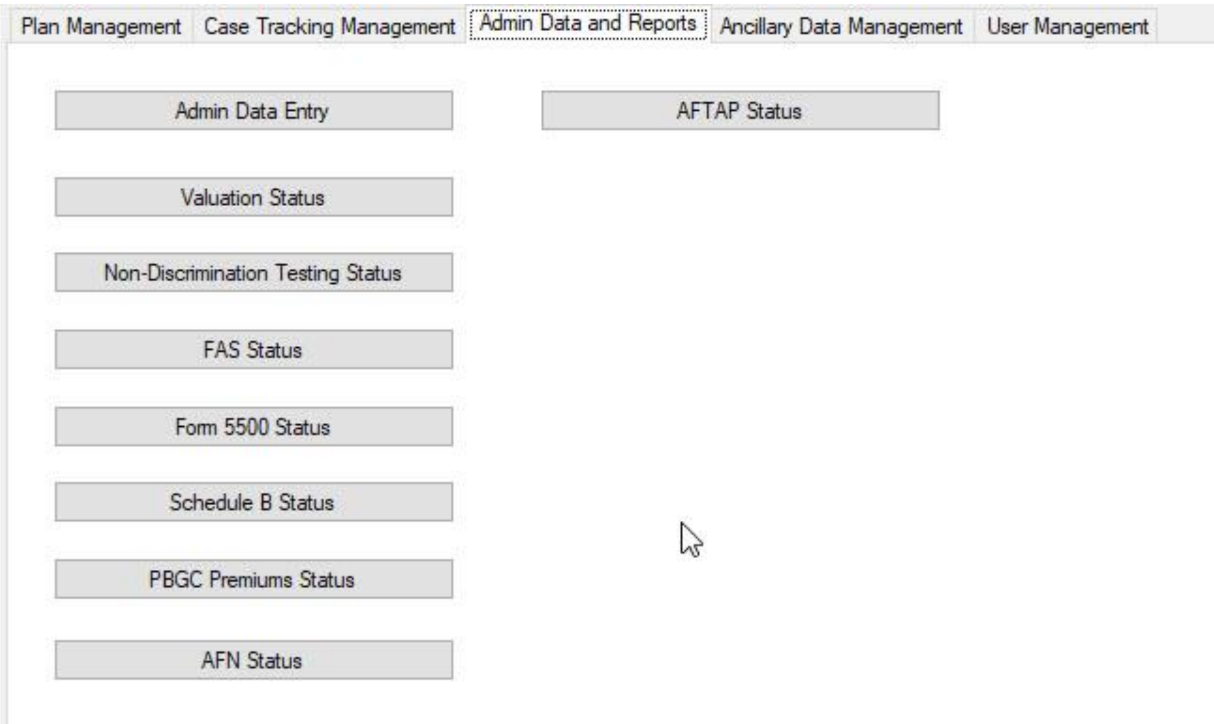
- Pertinent administration event and status dates
- Valuation
- Testing
- Form 5500
- FAS
- Funding
- PBGC



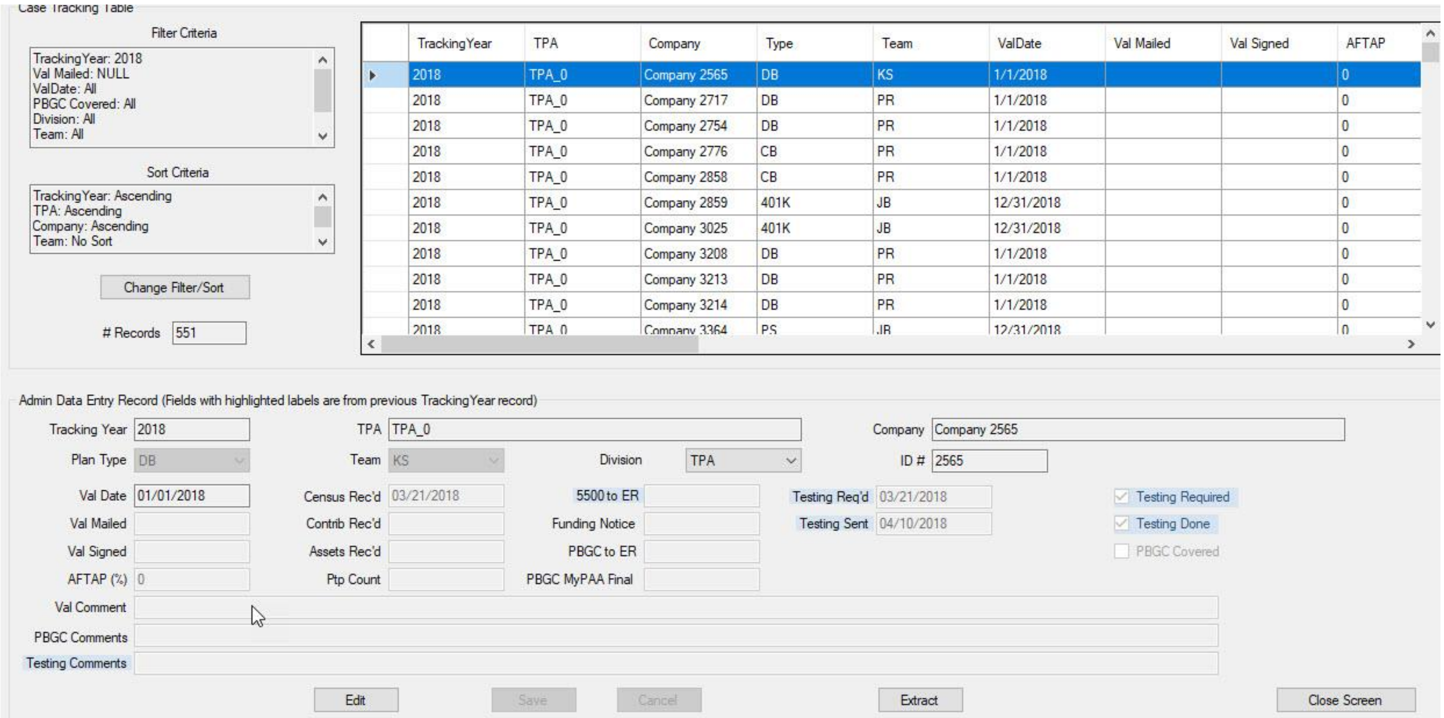
This view provides the tools to roll forward one or more plans to the next tracking year with key fields copied from the previous tracking year and dates brought forward to initialize administration for the new year.

Admin Data and Reports

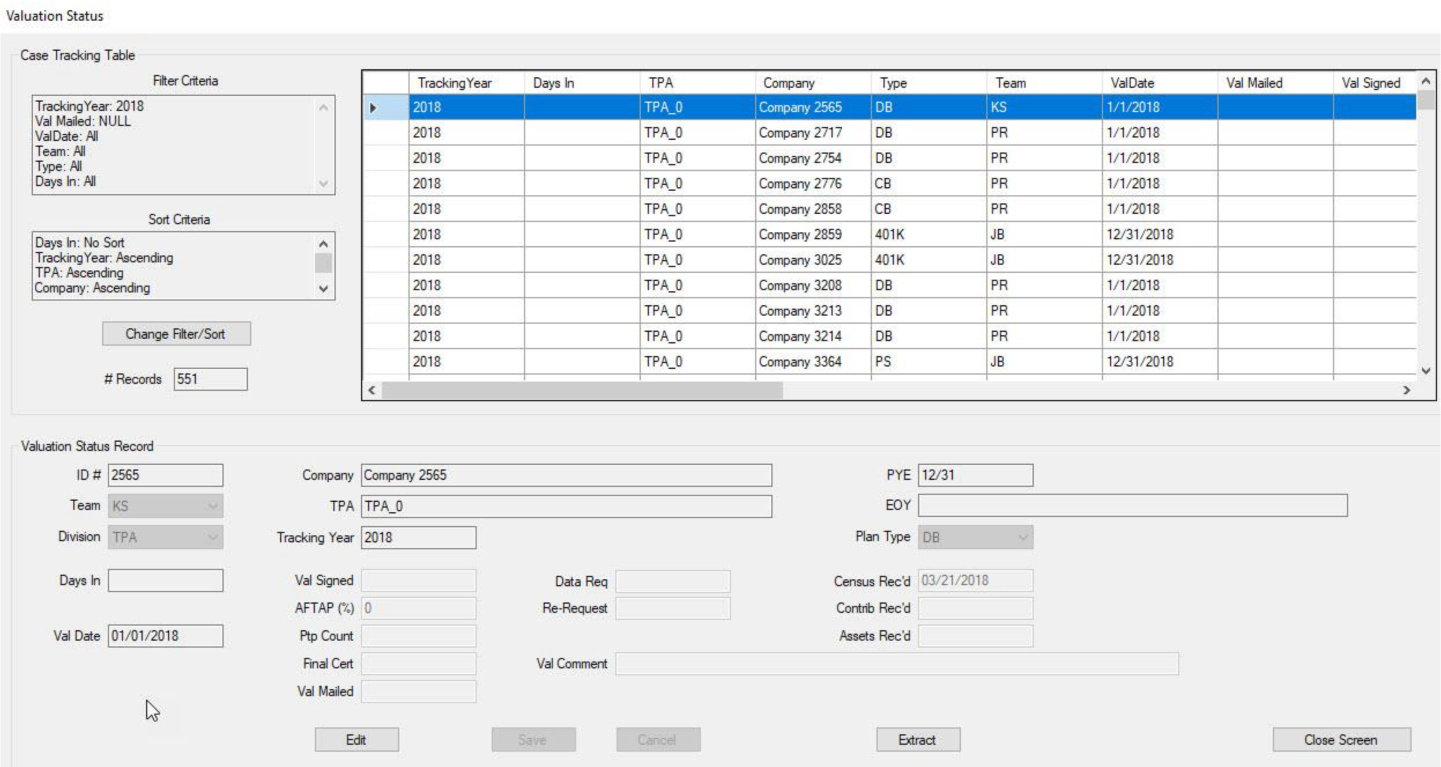
This tab provides access to focused workflow process functions where the data elements are filtered to the needs of the respective function. Additional fields provide key measures for prioritization (e.g., Days Before Due); filter and sort defaults also provide a prioritized view.



The 'Admin Data Entry' function provides key data elements across all administrative functions and provides a one-stop place to view and update the broader plan status.

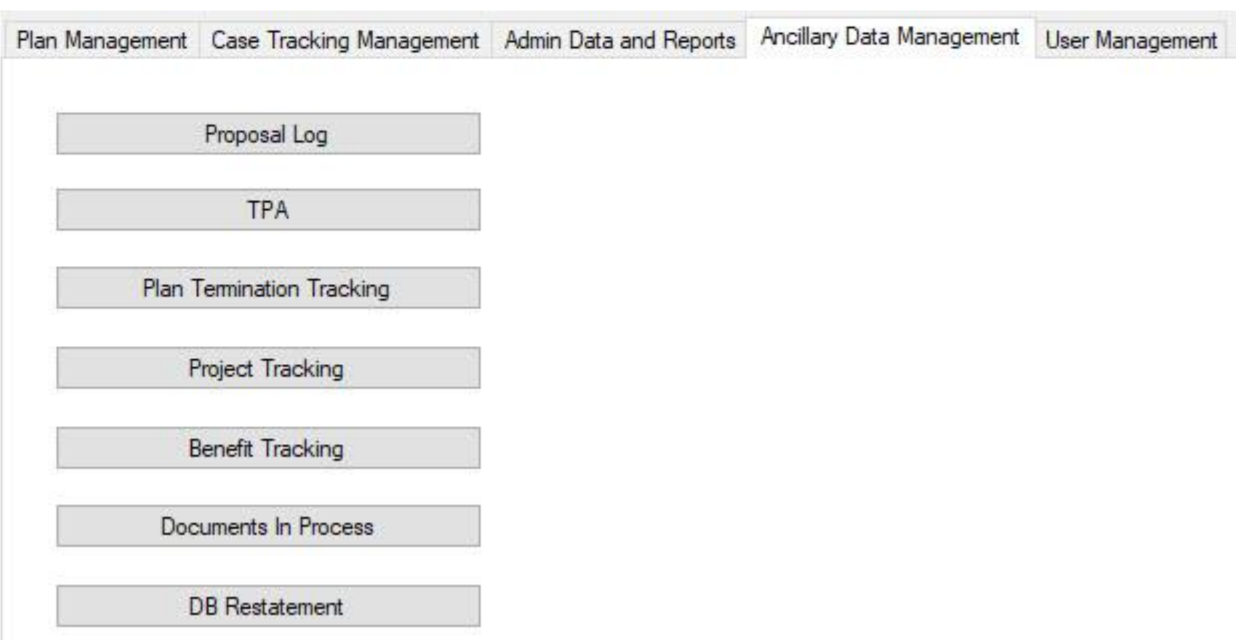


As an example of a focused workflow view, ‘Valuation Status’ is shown below:



Ancillary Data Management

This tab provides access to functions associated with TPA services but not directly concerned with routine plan administration.



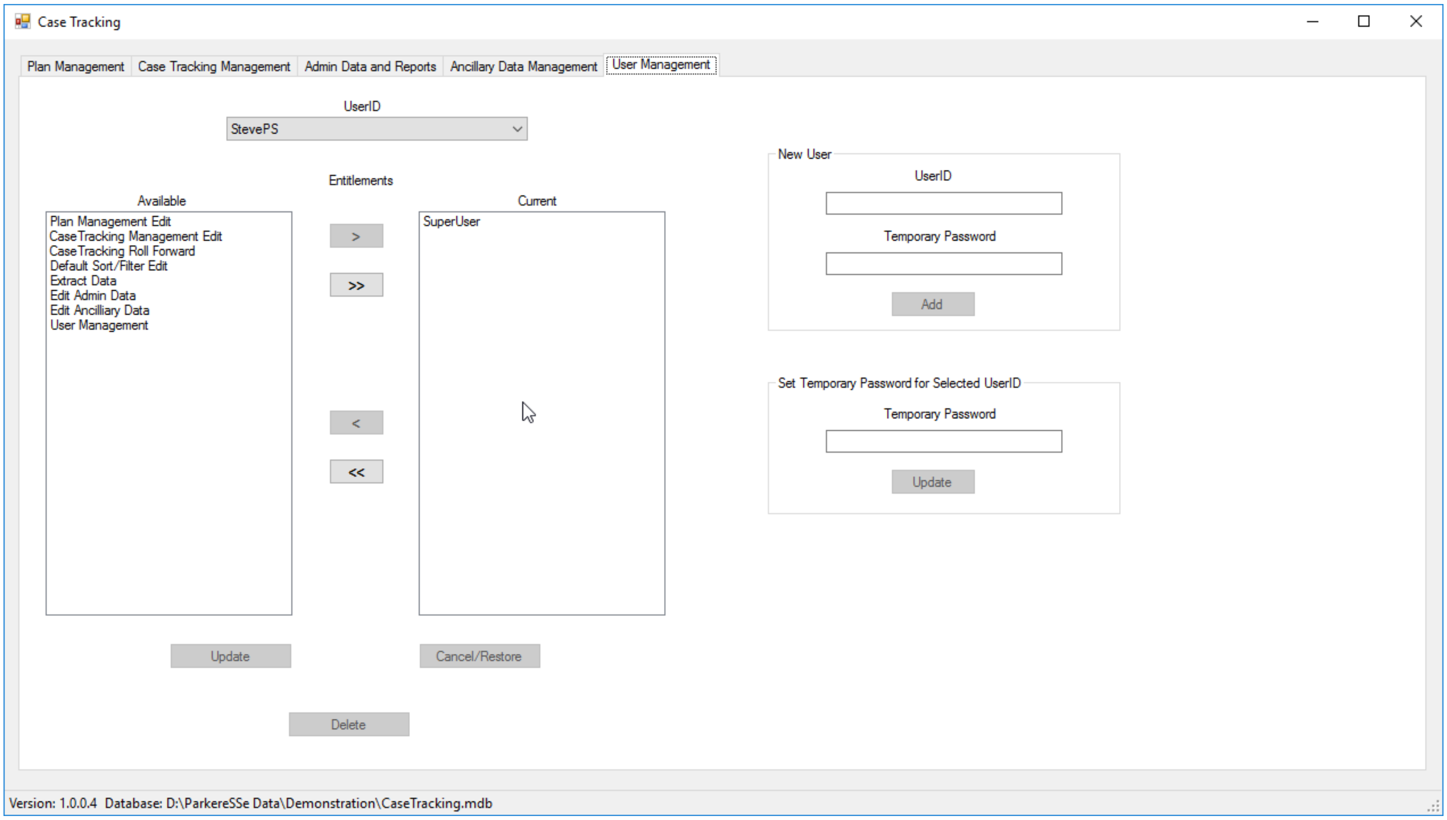
Here is a short description of these functions:

- Proposal Log: Track new business prospects with contact/plan information, activity dates, and status
- TPA: This is the master list of TPAs affiliated with clients
- Plan Termination Tracking: Tracks PBGC interaction and status
- Project Tracking: Special project tracking
- Benefit Tracking: Participant benefit calculation request tracking
- Documents In Process: Tracks client document status, review process, action dates, and comments
- DB Restatement: Tracks status, review, and dates associated with plan restatement. Provides tools to select existing plans for restatement.

User Management

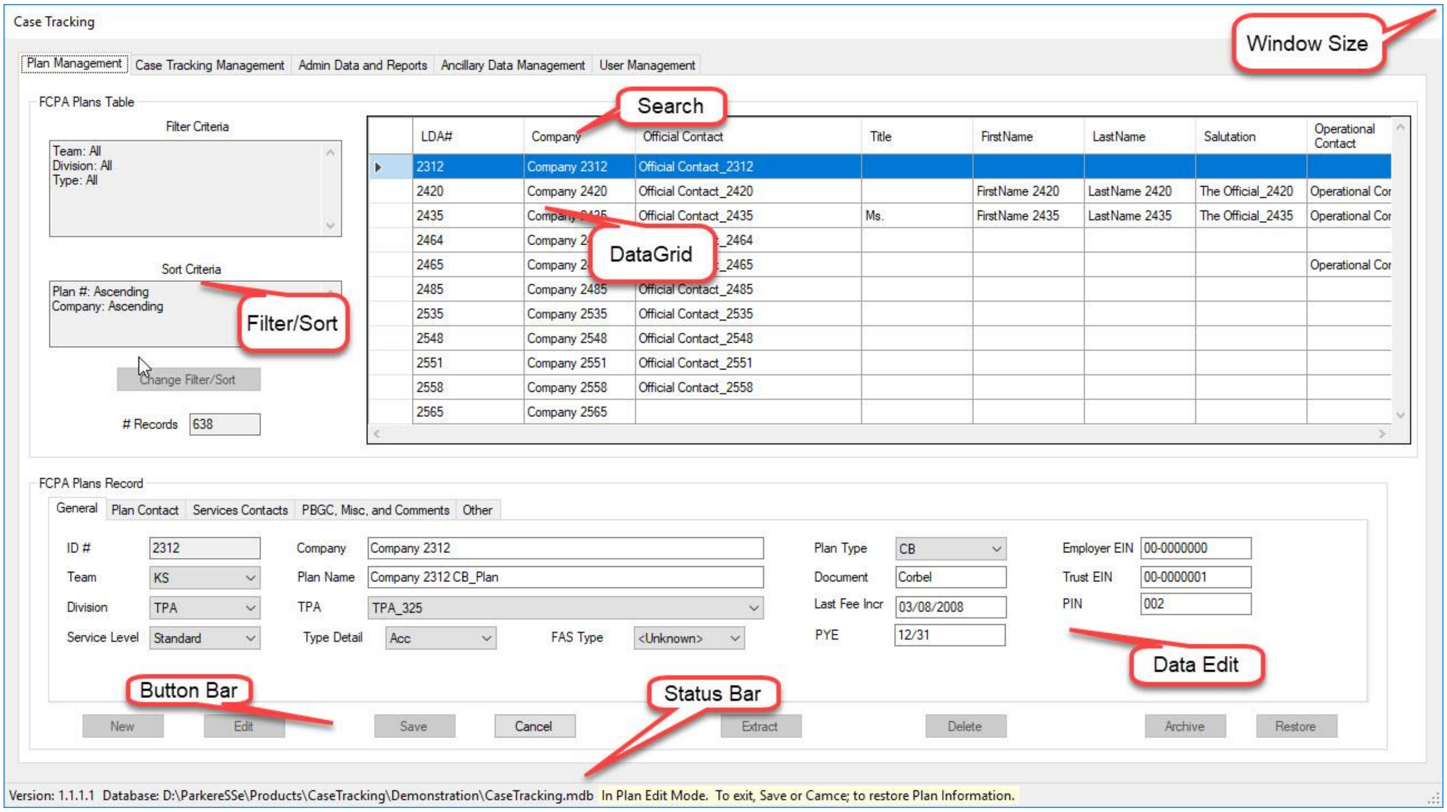
This screen manages users with these features:

- Edit Entitlements
    - These provide access to various functions in the application
- Add User
- Delete User
- Reset Password



Common Screen Tools and Features

All views and functions provide the following tools and features:



- Window Size: The Window size can be changed by dragging the horizontal/vertical borders. The DataGrid resizes to fit the new window showing more or less rows and columns.
- DataGrid: View-only full record data. Row can be selected by clicking on a cell or left-size row border. Select row is highlighted and data shown in the Data Edit section. Data column widths can be adjusted.
- Search: Clicking on a text valued column header brings up a Search window. Text (full or portion) can be entered and the first row that contains the text will be highlighted in the DataGrid. A Next Row button finds the next row with the test. Closing the Search window leaves the last found row selected (highlighted).
- Filter/Sort: Displays the current data filter and sort criteria, reflected in the displayed data in the DataGrid. Selecting 'Change Filter/Sort' brings up a window where filter and sort options can be edited. A Default option is provided to restore the application defaults for the function.
- Data Edit: Displays data for the selected DataGrid row. This is where data is edited.
- Button Bar:
  - Provides options to Edit, Save and Delete the selected DataGrid row. New rows can also be created. Not all buttons are available for all functions.
  - Extract button writes current DataGrid rows to an Excel workbook. Current Filter and Sort criteria are also written to the workbook.
- Status Bar: Contains:
  - Application Version
  - Database path (Access) or SQL Server database name
  - Status Message: Indicates mode or current process