**CDC Information Sheet 1**

**CDC TRACCS PROCESS FLOW**

**INITIAL CONTACT**

**NAME/ADDRESS REGISTRATION**

* **TRACCS** will Auto create a CDC package for client based on pre-defined templates

**NOTIFICATIONS**

* **TRACCS** will send email notifications to nominated staff/case managers on the distribution list for necessary FYI and follow-up

**DETAILED REGISTRATION**

* + - * Quote created using **TRACCS QikQuote**
      * **TRACCS** will auto-attach Full Service Agreement and written careplan to quote
      * CDC Goals entered
      * Agency Strategies to achieve goals entered
      * Strategies matched Agency Services
      * Modify careplan/service agreement as required

**INITIAL PERSON TO PERSON CONSULTATION**

* Quote Discussion

**QUOTE ACCEPTANCE / ONBOARDING**

* Setup Budget alerts in client package
* Setup management budgets for package support areas
* Accept Quote/Admission
* Notifications
* Prepare Master Roster with reference to quoted hours/services