

# The security you need. The results you trust.



## *Online Integrated Management Tool*

- *Guardian*
- *Representative Payee*
- *Group Home*
- *Fiduciary*



## ***eguardianship.com***

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**eGuardianship.com** is an Online Integrated Management Tool that streamlines daily tasks, increases accountability and provides all reporting functions. It was built exclusively for the Guardian, Representative Payee, Group Home and Fiduciary industry so it can work the way you work. By increasing efficiencies and eliminating duplicate tasks, eGuardianship can save you time, money, allow you to grow and focus on what you do best.

Explore our site and take a few minutes to download our instructional videos that show you a little about what the system looks like and how easy it is to navigate. After you're done, contact us with any questions or to set up an online demonstration.

### Who is this for?

eGuardianship was designed alongside people in the industry using either a combination of programs or a "home made" system to manage their needs. With their input, we were able to come up with an easy to use, cost saving solution that is by far the best solution available today.

### Guardian

A Public Guardian can use eGuardianship as their complete management solution. All time and case management needs can be tracked and reported from any computer with an internet connection. Easily keep track of payments, bills, estate values including stocks and bonds and even print out needed checks to pay vendors. Increase your accountability by tracking changes and ensuring that work is done. Automatically generate your Court or Reporting Agency required reports for your jurisdiction.

### Representative Payee

A Representative Payee can use eGuardianship to manage all financial and case management, including time tracking, needs. eGuardianship reminds you of bills to be paid, prints the checks, and then reconciles your accounts in a simple and easy way. All of this can be done from nearly any computer with an internet connection. Caseworkers can be given access to certain parts of the system to request checks for their clients or to check on a balance. They can also track the time spent with their clients and generate bills and reports.

### Group Home

A Group Home can use eGuardianship to compact their management system into one program. By combining the much-needed tasks of managing both financial and clinical needs, your staff can become more efficient in common, everyday tasks including time spent with individual clients.

### Fiduciary

A Fiduciary can use eGuardianship to efficiently manage the financial and personal affairs of clients. eGuardianship can help make the process more manageable while saving money and time spent on daily tasks. Tracking of time, assets, check printing and the flexible reporting system are examples of how a Fiduciary could use eGuardianship.

#### System Benefits

- Created specifically for Guardian / Payeeship Industry
- Eliminates DOUBLE ENTRY
- Only ONE program to manage and update
- Reduced reliance and cost of internal IT department
- Increases accountability, improved record keeping
- Increases security
- Eliminates worry about disaster recovery. Backups done automatically
- Industry leading Management Innovation delivered to organizations
- Decrease computer hardware costs
- Delivered securely over internet
- Create all needed reports automatically
- Print all needed checks – either individual accounts or commingled accounts
- Automatically distribute and calculate interest on accounts
- Easily reconcile accounts with bank
- Multiple permission settings
- Built in security for getting money out of system
- Case worker access from anywhere
- Track multiple accounts per client
- Comprehensive reports – all clients, any timeframe
- Secure online access using latest authentication and encryption methods
- Track all contact with clients – phone calls, mailings, time
- Provide better services to clients
- Reduce time spent on daily tasks



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