



Introducing the Key Date Automation Tool

Manually updating disclosure dates in Encompass® can be time-consuming and prone to error. When users forget to enter the correct dates, it can lead to unreliable data and gaps in compliance tracking. The Key Date Automation PowerTool™ simplifies this process by automatically populating tracking dates based on when disclosure documents are uploaded to the eFolder.



KEY DATE AUTOMATION TOOL

KEY BENEFITS:



Auto Date Population

Automatically updates "Other Tracking" dates in Disclosure Tracking when disclosure documents are uploaded to the eFolder.



Customizable Configuration

Administrators can configure the tool to link specific documents to tracking fields for more tailored automation.



Improved Compliance

Reduces manual data entry and improves the integrity of disclosure timelines, supporting more efficient audits and reporting.