

Clients & Service Requests vs. Projects

The methodology for using the DAD application is that advocacy efforts from an agency for an individual are recorded as a Service Request associated with a Client. Advocacy efforts from an agency for a group of individuals, training or outreach activities, or other administrative projects are recorded as Projects.

Individuals are recorded in the system once as a contact and that contact has specified connections for the different recorded roles for that individual. A contact can be a client, a primary contact, an adversary, or any other contact type that is specified in the Administration. Regardless of how the contact is selected for editing, editing the contact information, such as the address or phone number, will update the contact's information for each item it is connected to. There is no limit to how many connections a contact can have.

Clients are only to be in the system once per individual and can have as many Service Requests as are provided by an agency without limit.

Service Requests can have only one Funding Source and one Priority and Objective to record the agency's advocacy efforts. If the agency needs to use multiple funding sources to document one advocacy effort, multiple Service Requests must be created to accommodate for each funding source.

Projects can have multiple Priority and Objectives and multiple Funding Sources. If multiple Funding Sources are selected the Funding Source distribution in percents must total 100%.

Time can be recorded to either a Service Request or a Project. DAD is developed so that all daily activities are recorded in DAD daily so that an electronic timesheet can be formulated that directly ties the funding source billable amounts to specific advocacy efforts for audit purposes.