

## *Application for Assistance Procedure*

Please direct anyone inquiring about PTAC services to go to our website at <http://cptac.org/> and fill out the Application for Assistance.

Prior to directing a company to fill out the application please make sure the individual is not a manufacturer's representative ("rep"), as we do not offer our services to anyone that can bill a company for their services. The Program Director will review the applications and assign the Counselor.

When you receive a new application, please contact the potential client **within 4 working days**. Keep track of the appropriate information (appointment date, time, location, attempts to contact etc.) and send the appointment information in your weekly schedule unless the appointment is made for a day that you have already sent your schedule in for. In that case send a separate email noting the change in your schedule.

If 2 unsuccessful attempts were made to contact a company within a month (1 email and 1 call), the counselor is responsible for closing out the client record.

If the client is not registered with either the Secretary of State or with their town clerk they should be told to do so before they can become an active client.

When you determine that a company is not suited for government contracting, set the client status in Neoserra to "Inactive", and record an Initial Counseling Session.

The goal of this policy is to ensure that a company is not lost in the system. Your cooperation is required. An effective tracking system is necessary to ensure that companies are contacted promptly, while at the same time appointments may be scheduled in accordance with a Counselor's work schedule. It is important companies that become clients have reasonable potential for success in government contracting, have good computer skills and have typically been in business for at least two years. Our goal is to help Connecticut businesses through offering procurement technical assistance (as defined in the Cooperative Agreement) while using federal and state funds wisely.