

**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.