



**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM**  
*Dr. R. Scott Ralls, President*

June 26, 2008

**MEMORANDUM**

To: Senior Continuing Education Administrators  
Small Business Center Directors

From: Dr. George Millsaps, State Director  
Small Business Center Network

Subject: Small Business Center Network Client Management System (SBCN CMS)  
Procedures

Upon recommendation of the Small Business Center Network Policy and Procedures Committee the following procedural changes to the SBCN CMS will be effective August 1, 2008:

1. Client information is **expected** to be entered into the SBCN CMS within five working days of the date of counseling or contact. Due to workload and various duties that take Small Business Center (SBC) directors out of the office, a great number of directors have reported difficulty in adhering to the 72 hour data entry requirement as currently stated in the SBCN Program Guidelines. The SBCN Policy and Procedures committee has recommended, and I support, modifying the current language **from requiring** data entry within 72 hours **to an expectation** that the data be entered within five working days. The expectation of entering data within five working days excludes days that the college is closed or the SBC Director is on leave.
2. At the end of each month, counseling records for the previous month will be “locked” to prevent entry or modification. Some directors are delaying entry of data into the SBCN CMS for weeks or months thus making reports at local and state level questionable. To ensure reliability of data, the SBCN Policy and Procedures committee has recommended, and I support, restricted entering or modifying client data after the end of the month following the counseling session. For example on August 31<sup>st</sup> changes to data would not be allowed prior to August 1<sup>st</sup>. This change will in no way hamper the SBC Director’s ability to view previous data, continue relationships with the clients, or enter new sessions after the lockdown date. Exceptions may be granted by the State Director on an incident-by-incident basis.

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3. SBCs are expected to contact ongoing clients at least every 30 days. Lapsed time between contacts shall not exceed 90 days without client file documentation on why 90 days was exceeded. Currently, most SBCs have “open” client cases in the SBCN CMS where there have been many months without any contact between the SBC and the client. Most of these clients are no longer considering starting a business, failed to follow through on SBC recommendations, or have successfully started businesses without notifying the SBC. To rectify this issue SBCs are to:
  - a. Clearly indicate what was discussed in the counseling session, notate what next step is to be taken, who is to take that next step, and a target date for completion,
  - b. Use the SBCN CMS, Groupwise calendar, or some other method to remind them to follow up on the client within a reasonable timeframe,
  - c. Contact the client within 90 days of the last counseling session and either schedule a follow up session or close the client case. SBCs should note that closing the case does not delete the case information and SBC Directors need only enter a follow-on session to reopen the case.