informationinc.

Day Sheets - Clerical Guide

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Contents

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Overview

Information, Inc. Day Sheets is an employee time tracking application for North Carolina Department of Social Services employees. Time is tracked, approved and submitted to the state office all via a web interface. The system consists of four user types: Worker, Clerical, Finance, and Admin.

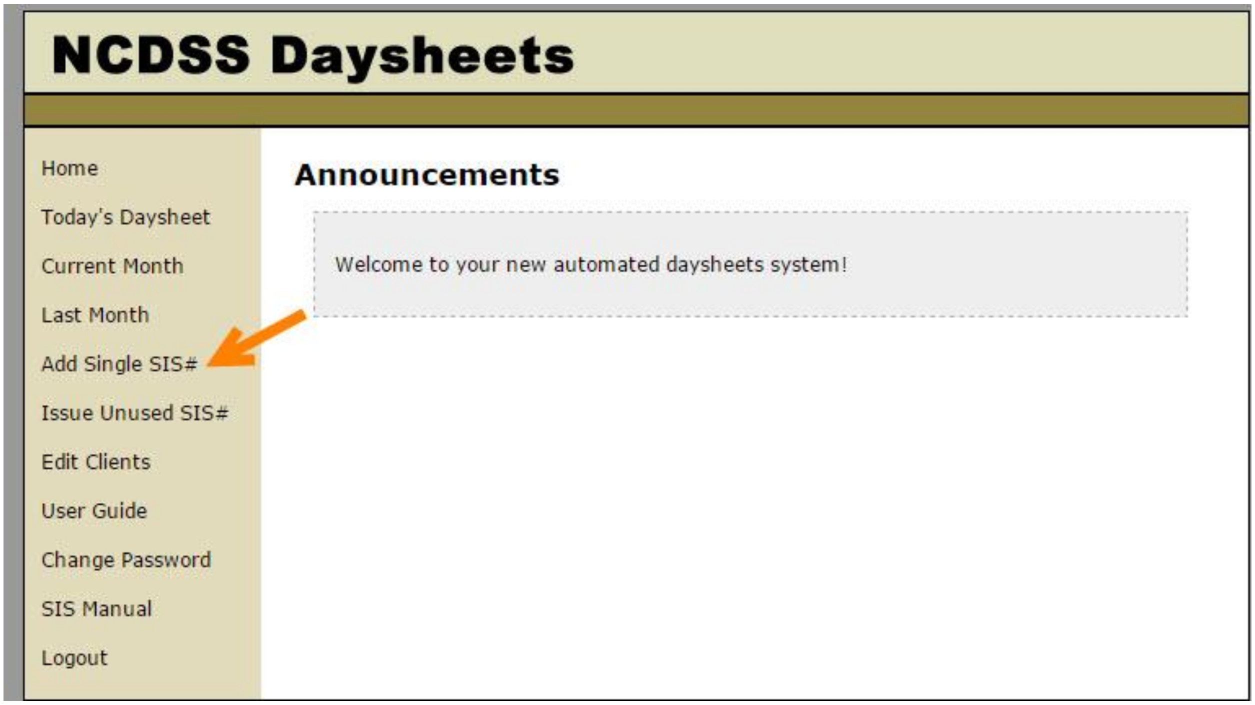
Workers generally only have access to see their own time entries. If they supervise other employees, however, they also can review the time entered by their team members. Typical use of the system by these user types involves entering time on a daily basis, certifying their own time at the end of each month, and approving time of those employees that they supervise. At any point during the month users can create a PDF report for all time entered for the current or previous month. Supervisors are able to generate this same report for each member of their team.

Once all daysheets for the month have been entered, certified, and approved, Finance users have the ability to send the data to the state via the upload screen. The State requires that this usually be done within the first five days of each month. The system requires that all time entries entered for the submitting month be both certified and approved. If there are a any workers that have not yet done this, the system identifies these users allowing the Finance user to follow up. After submitting the data to the state, a report can be run within the State Data Warehouse system to verify success of data transfer.

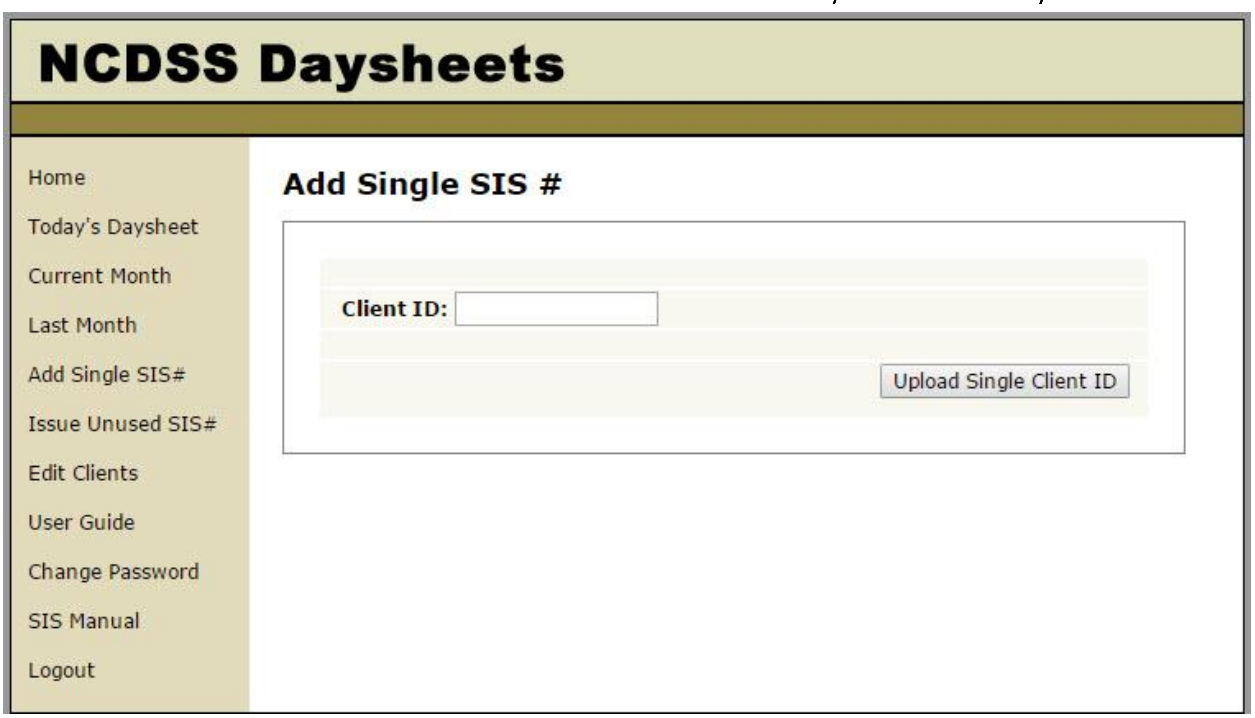
Client information is entered into the system by the Admin or Clerical users. SIS numbers (Client Ids) sent from the state can be uploaded in batch using a text file. This creates 'unused' SIS numbers which can later be assigned to new clients. Alternatively, SIS numbers can be added one at a time. To ensure data integrity workers are only able to select from this list of pre-entered clients when entering time.

Adding Single Client ID (Assists or Existing Client)

1. Click on the Add Single SIS # link.

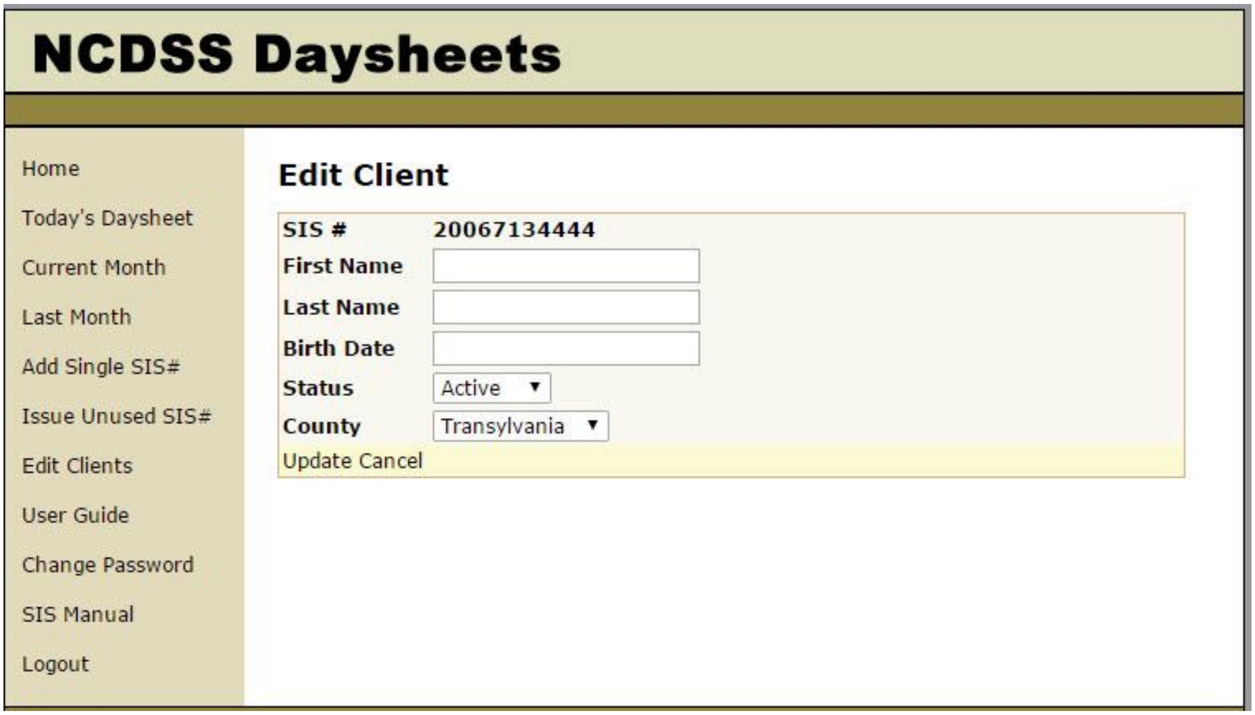


2. Enter the new ID in the 'Client ID' text box. This ID should not currently be used in the system.



3. Click 'Upload Single Client ID'.

4. You will be taken to the 'Edit Client' screen.



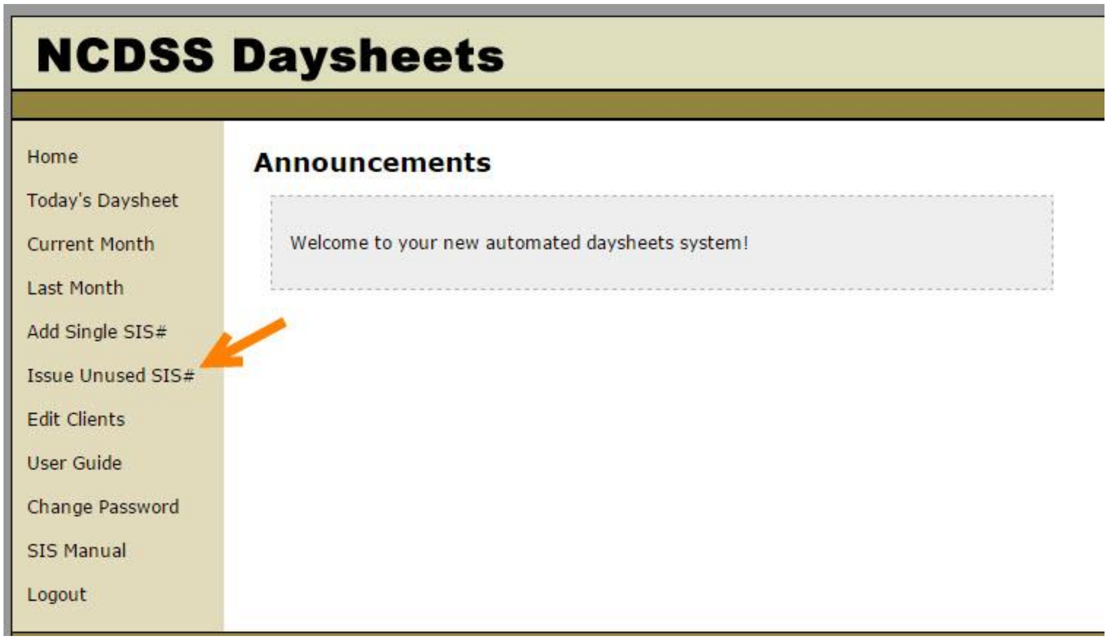
5. Enter in First Name, Last Name and Birth Date.

6. Select a County to indicate the client ID was issued in another county (used for assists). The 'County' drop down will default to your county.

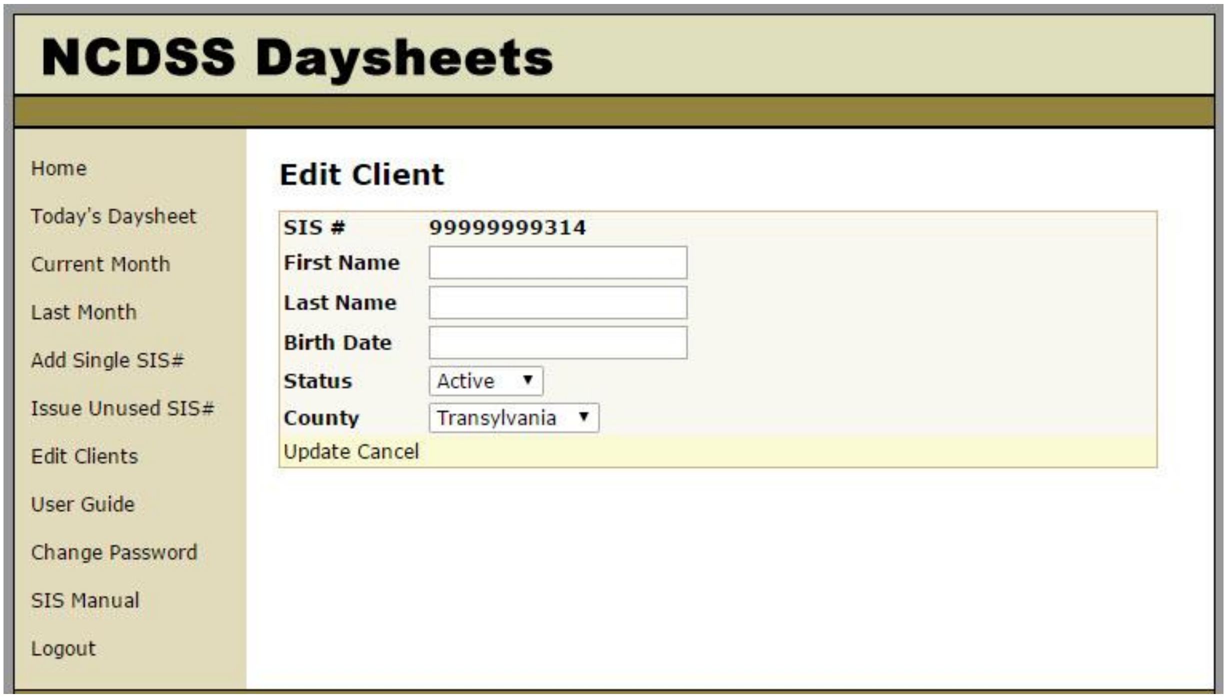
7. Click 'Update' to create the new Client.

Issue Unused SIS

1. To assign a placeholder Client ID to a new Client, select the 'Issue Unused SIS #' link.



2. You will automatically be shown a screen with the next available SIS #.



3. Enter in First Name, Last Name and Birth Date.

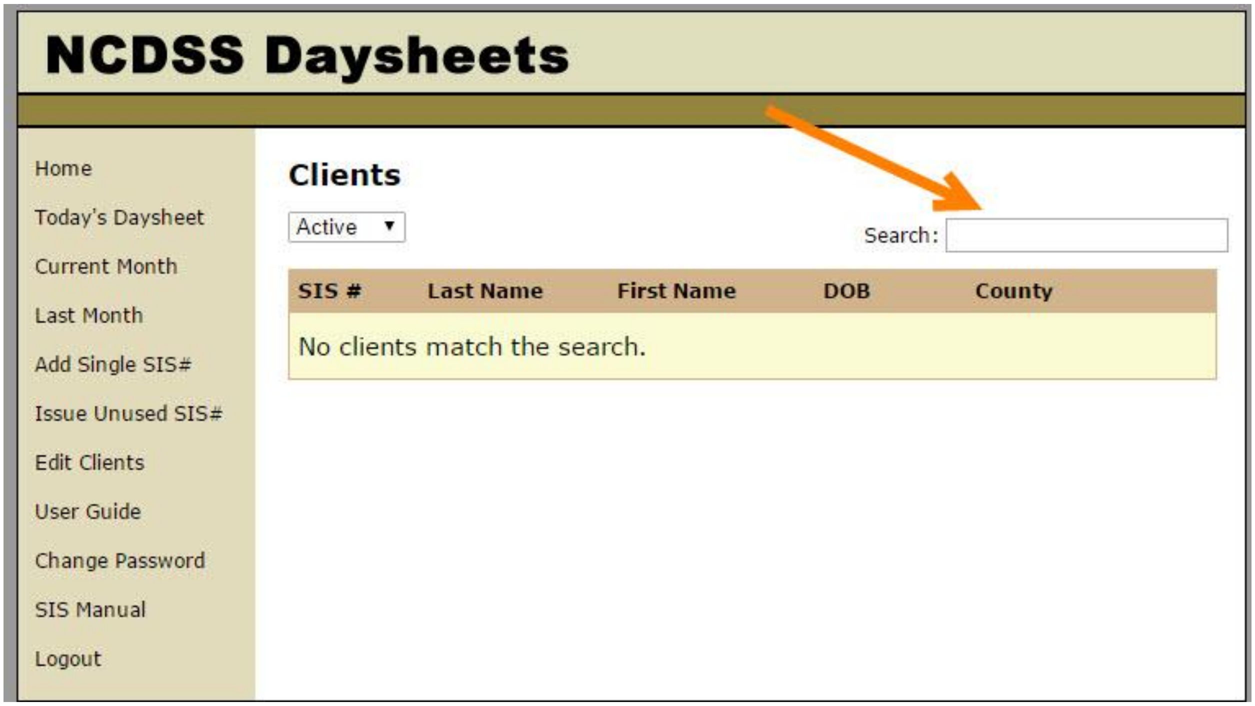
4. Select a County to indicate the client ID was issued in another county (used for assists). The 'County' drop down will default to your county.

5. Click 'Update' to create the new Client.

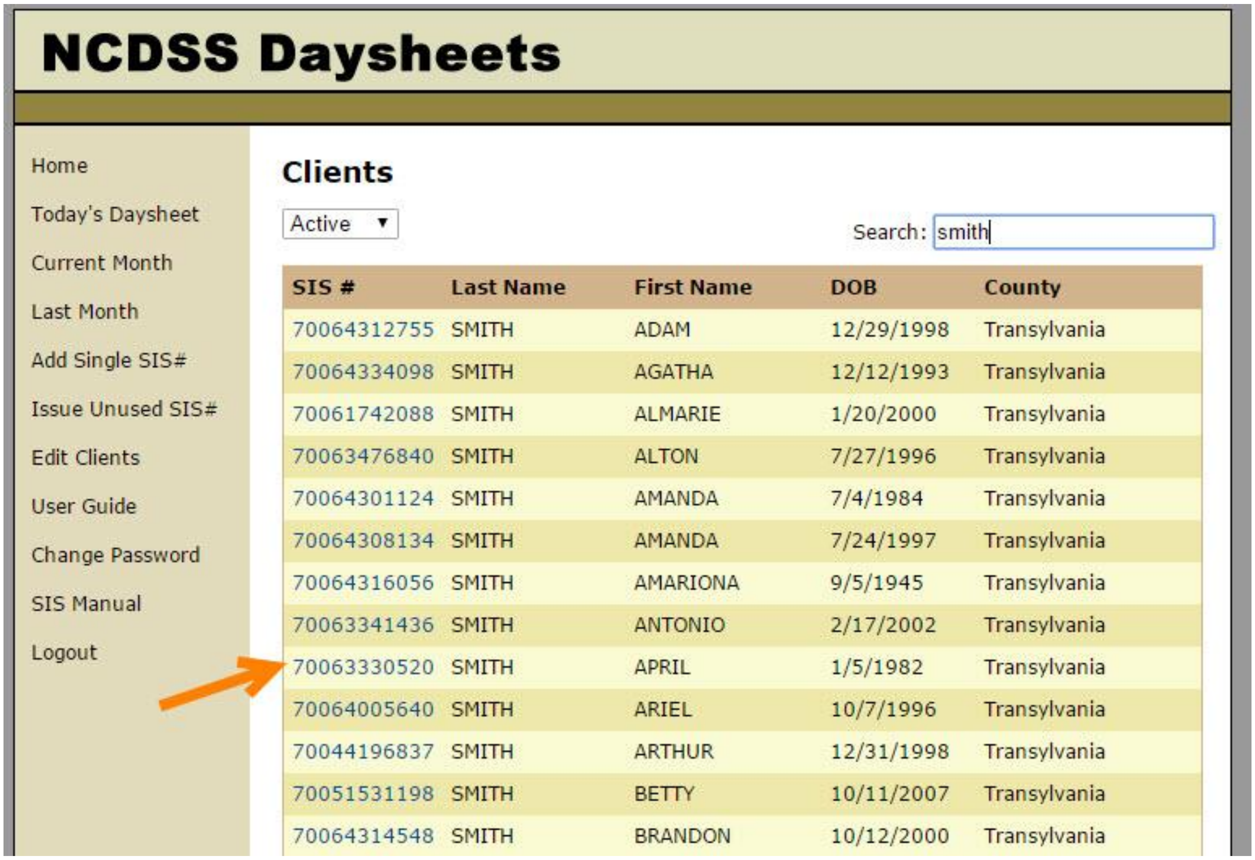
Edit Clients

1. Click on the ‘Edit Clients' link.

2. Use the ‘Search’ function in the top right corner to locate the Client record you would like to edit.



3. Click on the SIS # next to the Client to edit the record.



4. Make any necessary updates and click the 'Update' link to complete the changes.