

informationinc.

Day Sheets - Clerical Guide

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Information, Inc. Day Sheets - Clerical Guide

Information, Inc. Contact Information

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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 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.



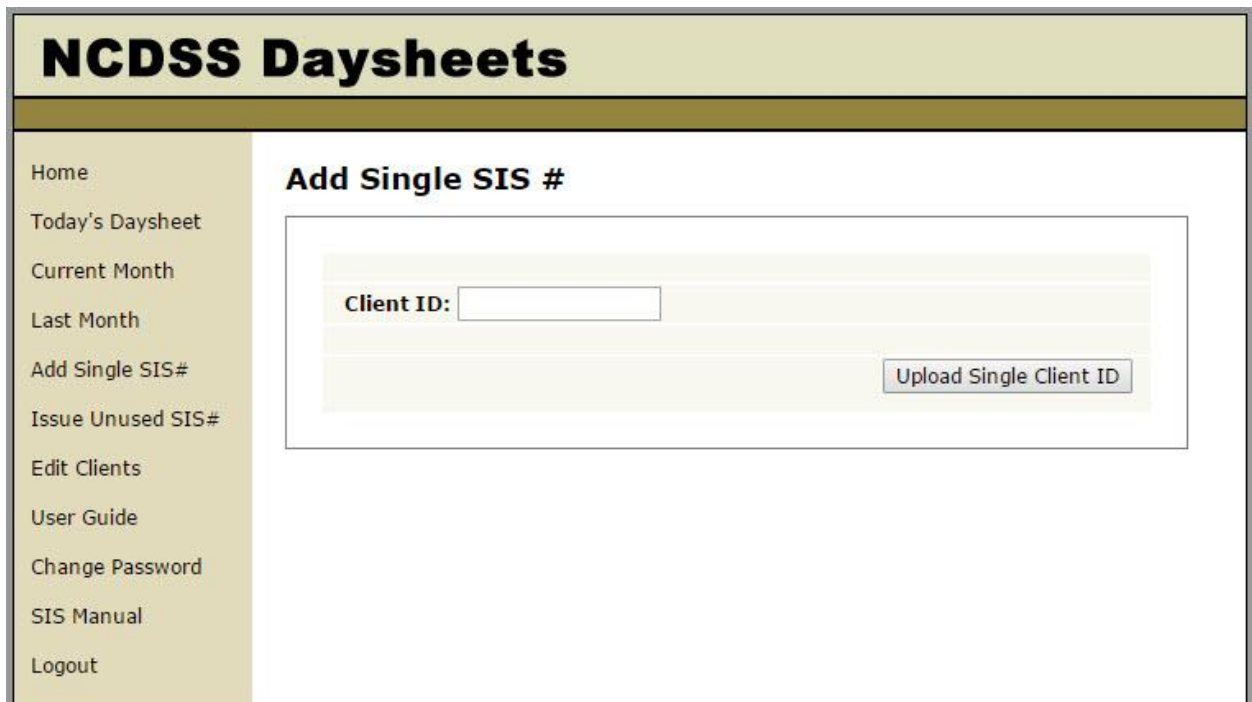
NCDSS Daysheets

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Announcements

Welcome to your new automated daysheets system!

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



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Add Single SIS #

Client ID:

Upload Single Client ID

3. Click 'Upload Single Client ID'.

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

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Edit Client

SIS # 20067134444

First Name

Last Name

Birth Date

Status

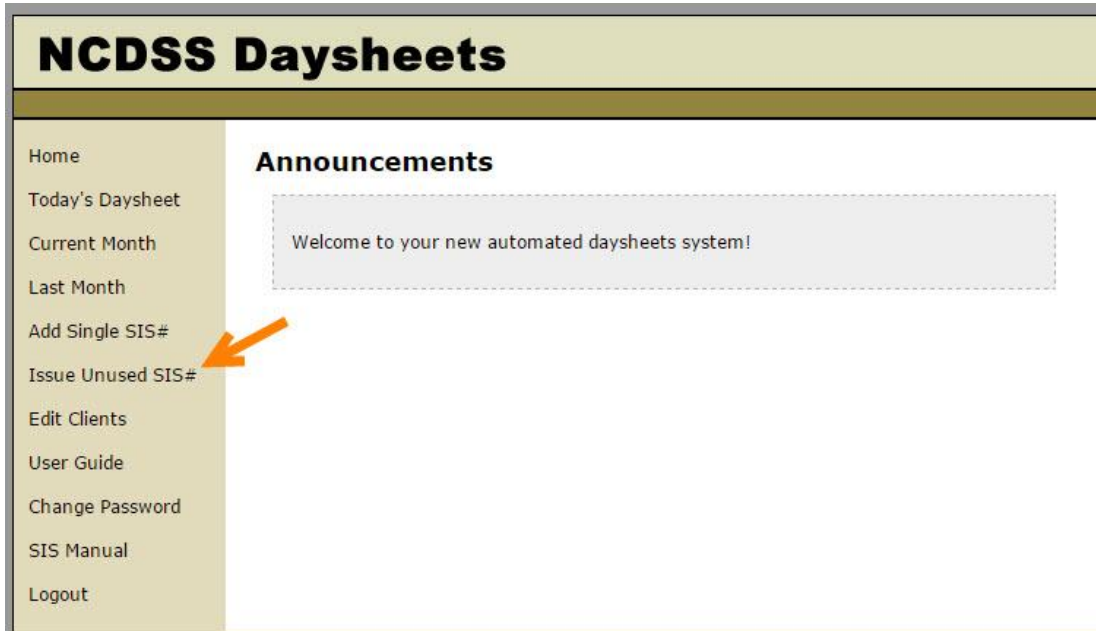
County

Update Cancel

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.



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Announcements

Welcome to your new automated daysheets system!

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



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Edit Client

SIS # 99999999314

First Name

Last Name

Birth Date

Status Active ▼

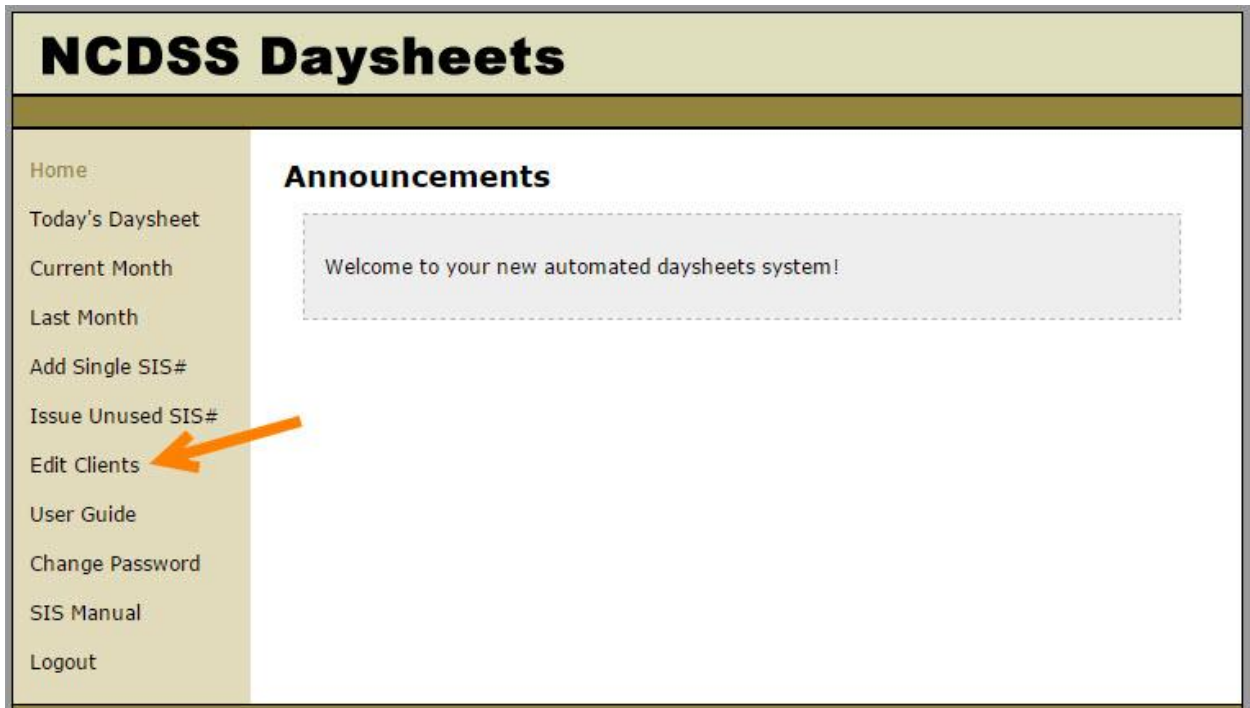
County Transylvania ▼

Update Cancel

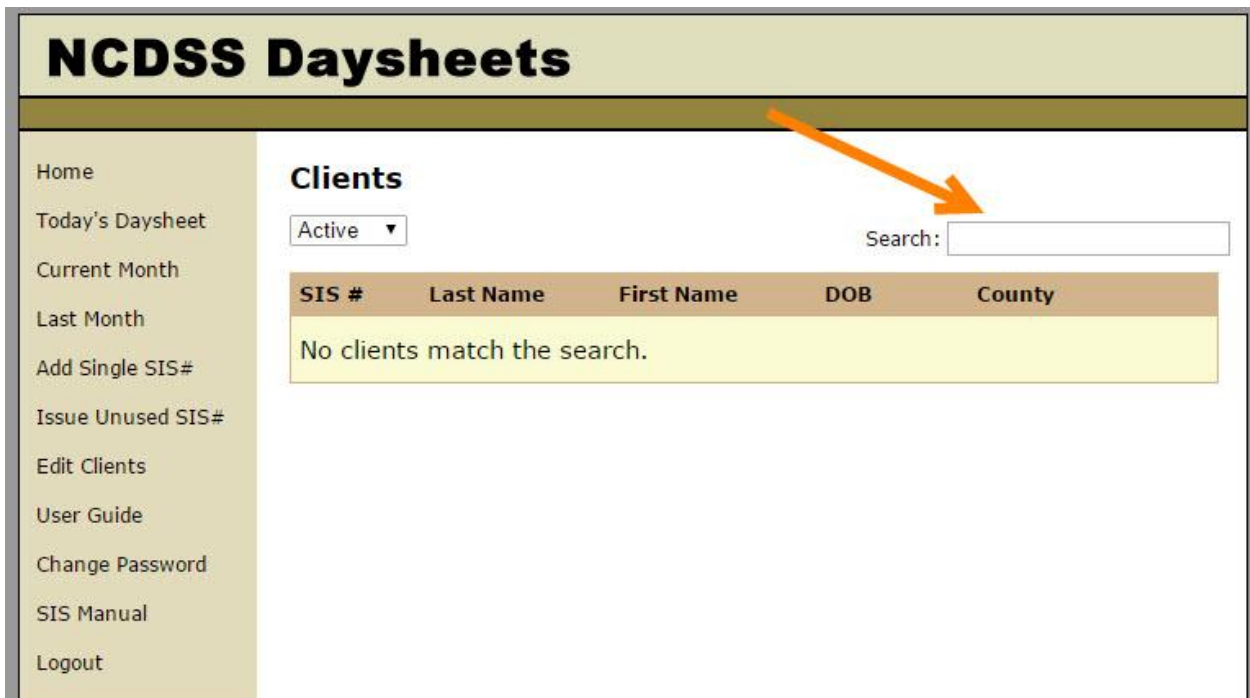
3. Enter in First Name, Last Name and Birth Date.
4. Select a County to indicate the client ID was issued in another county (used for assists). The 'County' drop down will default to your county.
5. Click 'Update' to create the new Client.

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.

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Clients

Active ▾

Search:

SIS #	Last Name	First Name	DOB	County
70064312755	SMITH	ADAM	12/29/1998	Transylvania
70064334098	SMITH	AGATHA	12/12/1993	Transylvania
70061742088	SMITH	ALMARIE	1/20/2000	Transylvania
70063476840	SMITH	ALTON	7/27/1996	Transylvania
70064301124	SMITH	AMANDA	7/4/1984	Transylvania
70064308134	SMITH	AMANDA	7/24/1997	Transylvania
70064316056	SMITH	AMARIONA	9/5/1945	Transylvania
70063341436	SMITH	ANTONIO	2/17/2002	Transylvania
70063330520	SMITH	APRIL	1/5/1982	Transylvania
70064005640	SMITH	ARIEL	10/7/1996	Transylvania
70044196837	SMITH	ARTHUR	12/31/1998	Transylvania
70051531198	SMITH	BETTY	10/11/2007	Transylvania
70064314548	SMITH	BRANDON	10/12/2000	Transylvania

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

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Edit Client

SIS # 70063330520

First Name

Last Name

Birth Date

Status Active ▾

County Transylvania ▾

Update Cancel