

**informationinc.**

## **NCDSS Day Sheets - Admin Guide**

*Prepared by:*

***Information, Inc.***

*michael@informationinc.net*

*919-545-0246*

## Contents

Information, Inc. Contact Information.....	3
Overview .....	3
Adding Clients - Single Client ID .....	4
Adding Clients - Bulk Client ID Upload .....	5
Issue Unused SIS # .....	6
Edit Clients .....	8
Add/Edit Announcements.....	9
Add Worker .....	11
Manage Workers.....	12
Manage Codes .....	16
Manage Expected Minimum Minutes.....	17
Upload Data to State.....	18
Lock/Unlock Daysheets .....	19
Reports .....	20

# NCDSS Day Sheets - Admin Guide

---

## Information, Inc. Contact Information

For technical questions, please contact:

Michael Bradley  
michael@informationinc.net  
919-545-0246

For all other questions, please contact:

Regi Bradley  
regi@informationinc.net  
919-545-0246

## Overview

NCDSS 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 Clients - Single Client ID

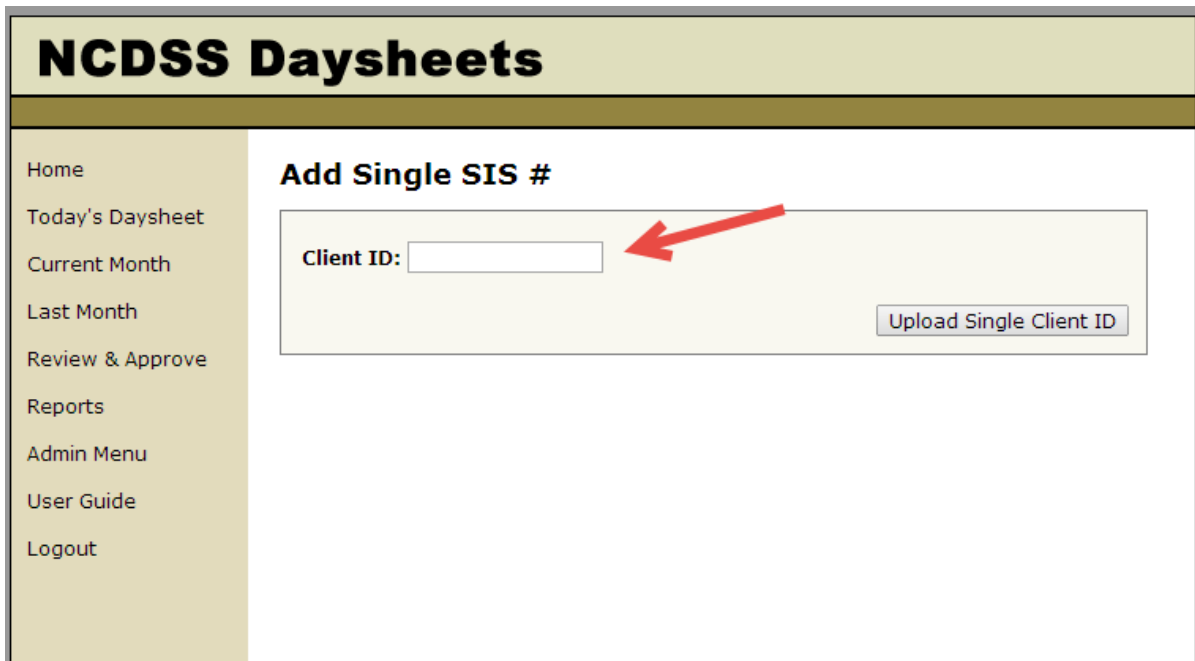
1. Click on the Add Single SIS # (Assists or Existing Client)' link on the Admin Menu page.



**NCDSS Daysheets**

<a href="#">Home</a> <a href="#">Today's Daysheet</a> <a href="#">Current Month</a> <a href="#">Last Month</a> <a href="#">Review &amp; Approve</a> <a href="#">Reports</a> <a href="#">Admin Menu</a> <a href="#">User Guide</a> <a href="#">Logout</a>	<b>Admin Menu</b> <a href="#">Add Single SIS # (Assists or Existing Client)</a> <a href="#">Issue Unused SIS #</a> <a href="#">Edit Clients</a> <a href="#">Manage Codes</a> <a href="#">Add Worker</a> <a href="#">Manage Workers</a> <a href="#">Add/Edit Announcements</a> <a href="#">Manage Expected Minimum Minutes</a> <a href="#">Show Upload History</a> <a href="#">Upload Data to State</a> <a href="#">Bulk upload SIS Numbers</a> <a href="#">Admin Guide</a>
--	--

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



**NCDSS Daysheets**

<a href="#">Home</a> <a href="#">Today's Daysheet</a> <a href="#">Current Month</a> <a href="#">Last Month</a> <a href="#">Review &amp; Approve</a> <a href="#">Reports</a> <a href="#">Admin Menu</a> <a href="#">User Guide</a> <a href="#">Logout</a>	<b>Add Single SIS #</b> <div><b>Client ID:</b> <input type="text"/></div> <div><a href="#">Upload Single Client ID</a></div>
--	---

3. Click 'Upload Single Client ID'.

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

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Edit Client**

SIS # 20011145789  
First Name   
Last Name   
Birth Date   
Status Active  
County Richmond  
Update Cancel

- Enter in First Name, Last Name and Birth Date.
- 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.
- Click 'Update' to create the new Client.

## Adding Clients - Bulk Client ID Upload

To use the bulk upload feature, you will need to supply a text file provided by the state listing Client IDs/SIS #s, formatted one per line.

- Click on the 'Bulk Upload SIS Numbers' link on the Admin Menu page.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Admin Menu**

Add Single SIS # (Assists or Existing Client)  
Issue Unused SIS #  
Edit Clients  
Manage Codes  
Add Worker  
Manage Workers  
Add/Edit Announcements  
Manage Expected Minimum Minutes  
Show Upload History  
Upload Data to State  
Bulk upload SIS Numbers  
Admin Guide

2. Select the file by clicking on the 'Choose File' button.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**SIS # Upload**

**Bulk Client ID Upload:**

Text File:  No file chosen

3. Click 'Bulk Upload'. Client placeholders will be created in the system and marked as 'unused'. Admin and clerical users can assign these placeholders to new clients.

## Issue Unused SIS #

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

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Admin Menu**

- Add Single SIS # (Assists or Existing Client)
- Issue Unused SIS #
- Edit Clients
- Manage Codes
- Add Worker
- Manage Workers
- Add/Edit Announcements
- Manage Expected Minimum Minutes
- Show Upload History
- Upload Data to State
- Bulk upload SIS Numbers
- Admin Guide

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

The screenshot shows the 'NCDSS Daysheets' application interface. On the left is a vertical navigation menu with the following links: Home, Today's Daysheet, Current Month, Last Month, Review & Approve, Reports, Admin Menu, User Guide, and Logout. The main content area is titled 'Edit Client' and contains a form with the following fields: 'SIS #' with the value '20011145790', 'First Name' with an empty text box, 'Last Name' with an empty text box, 'Birth Date' with an empty text box, 'Status' with a dropdown menu showing 'Active', and 'County' with a dropdown menu showing 'Richmond'. At the bottom of the form are two buttons: 'Update' and '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 on the Admin Menu page.

# NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

## Admin Menu

- [Add Single SIS # \(Assists or Existing Client\)](#)
- [Issue Unused SIS #](#)
- [Edit Clients](#)
- [Manage Codes](#)
- [Add Worker](#)
- [Manage Workers](#)
- [Add/Edit Announcements](#)
- [Manage Expected Minimum Minutes](#)
- [Show Upload History](#)
- [Upload Data to State](#)
- [Bulk upload SIS Numbers](#)
- [Admin Guide](#)

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

# NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

## Clients

Active ▼

Search:

SIS #	Last Name	First Name
No clients match the search.		



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

## NCDSS Daysheets

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

### Clients

Active ▾

Search:

SIS #	Last Name	First Name
2009999992	Smith	Dan
2009999999	Smith	Tina

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

## Add/Edit Announcements

Announcements are displayed on the home page and can be customized by administrators.

- Click on the 'Add/Edit Announcements' link on the Admin Menu page.
- Click the 'Add New' link at the top of the page to create a new announcement.

## NCDSS Daysheets

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

### Announcements

[Add New](#)

From	To	Announcement	Depletion Link
04/01/2013	05/01/2013	Welcome to NCDSS Day Sheets. If you have any questions please feel free to email Michael Bradley with Information, Inc. at michael@informationinc.net.	

3. Enter in announcement text and a display from and display to date. If desired, announcements can be created and published at a later date.

The screenshot shows a web application interface for 'NCDSS Daysheets'. The title 'NCDSS Daysheets' is at the top in a large, bold, black font. Below the title is a horizontal bar with a gold-to-brown gradient. On the left side, there is a vertical navigation menu with a gold background and black text. The menu items are: Home, Today's Daysheet, Current Month, Last Month, Review & Approve, Reports, Admin Menu, User Guide, and Logout. The main content area has a white background and is titled 'Edit Announcement' in bold black text. It contains three input fields: a large text area for 'Announcement', a date input for 'Display From', and a date input for 'Display To'. At the bottom of the form, there are two buttons: 'Insert' and 'Cancel', which are highlighted with a yellow background.

NCDSS Daysheets	
<a href="#">Home</a>	<b>Edit Announcement</b>
<a href="#">Today's Daysheet</a>	<b>Announcement</b> <input type="text"/>
<a href="#">Current Month</a>	<b>Display From</b> <input type="text"/>
<a href="#">Last Month</a>	<b>Display To</b> <input type="text"/>
<a href="#">Review &amp; Approve</a>	<b>Insert</b> <b>Cancel</b>
<a href="#">Reports</a>	
<a href="#">Admin Menu</a>	
<a href="#">User Guide</a>	
<a href="#">Logout</a>	

4. Click 'Insert' to create the announcement.

## Add Worker

1. Click on the 'Add Worker' link on the Admin Menu page.

The screenshot shows the 'NCDSS Daysheets' application interface. On the left is a vertical navigation menu with the following links: Home, Today's Daysheet, Current Month, Last Month, Review & Approve, Reports, Admin Menu, User Guide, and Logout. The main content area is titled 'Add Worker' and contains the following fields and controls:

- User ID**: A text input field.
- Last Name**: A text input field.
- First Name**: A text input field.
- Middle Name**: A text input field.
- Worker Number**: A text input field with a small note below it that says 'Must be correct!'.
- User Type**: A dropdown menu currently showing 'Admin'.
- Supervisor 1**: A dropdown menu.
- Supervisor 2**: A dropdown menu.
- Supervisor 3**: A dropdown menu.
- Supervisor 4**: A dropdown menu.
- Enable Future Months**: A checkbox that is currently unchecked.
- Password**: A text input field with a note below it that says '6 Characters Min.'.
- Confirm Password**: A text input field.

At the bottom right of the form are two buttons: 'Insert' and 'Cancel'.

2. Enter in UserID, Last Name, First Name, Middle Name, Worker Number.
3. Select the User Type and Supervisors from the drop down menus.
4. Optionally select the 'Enable Future Months' check box to allow the worker to enter time one year in advance.
5. Enter and confirm user password.
6. Click 'Insert'.

## Manage Workers

1. Click on the 'Manage Workers' link on the Admin Menu page.
2. Click on the 'Edit' link next to the user you would like to modify.

### NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

#### Edit Worker

User ID  
Include domain

abaker

Last Name

Baker

First Name

Angela

Middle Name

Worker Number  
Must be correct!

999999913

User Type

Worker

Supervisor 1

Heidi Schneider

Supervisor 2

Supervisor 3

Supervisor 4

Enable Future Months

☐

Reset Password  
6 Character Minimum

Inactive

☐

Locked Due to Invalid Attempts

☐

[Update](#) [Cancel](#)

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

4. To remove a user from the system and prevent logins, check the 'Inactive' checkbox.

## NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

### Edit Worker

**User ID**   
Include domain

**Last Name**

**First Name**

**Middle Name**

**Worker Number**   
Must be correct!

**User Type**

**Supervisor 1**

**Supervisor 2**

**Supervisor 3**

**Supervisor 4**

**Enable Future Months** ☐

**Reset Password**   
6 Character Minimum

**Inactive** ☐

**Locked Due to Invalid Attempts** ☐

[Update](#) [Cancel](#)

5. In the event that a user is still assigned as the supervisor for a worker, you will be reminded to assign a new supervisor to the listed workers.

## NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

### Edit Worker

The page at https://claydaysheets.informationinc.n...  
Are you certain you want to make this user Inactive? If you proceed, the following workers will need a new supervisor chosen: Kerrie Miller  

OKCancel

Worker Number

Must be correct!

999999999

User Type

Admin

Supervisor 1

Supervisor 2

Reset Password

6 Character Minimum

Inactive

☒

Locked Due to Invalid Attempts

☐

[Update](#)

[Cancel](#)

6. If an active user is no longer able to log in using their existing user id and password the account may have been locked due to an excessive number of invalid login attempts. If this is the case, the 'Locked Due to Invalid Attempts' check box on the 'Edit Worker' page will be checked. To re-enable the account and allow the user to log in, uncheck the box and click 'Update'.

## NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

### Edit Worker

User ID  
Include domain

abaker

Last Name

Baker

First Name

Angela

Middle Name

Worker Number  
Must be correct!

999999913

User Type

Worker ▼

Supervisor 1

Heidi Schneider ▼

Supervisor 2

▼

Supervisor 3

▼

Supervisor 4

▼

Enable Future Months

☐


Reset Password  
6 Character Minimum

Inactive

☐

Locked Due to Invalid Attempts

☐



[Update](#) [Cancel](#)

## Manage Codes

Admin users can manage Program and Service codes, choosing to make certain codes inactive for their workers. The display order can also be changed.


1. Click on the 'Manage Codes' link on the admin menu page.
2. Click on the 'Edit' link next to the code you would like to change.

### NCDSS Daysheets

[Home](#)  
[Today's Daysheet](#)  
[Current Month](#)  
[Last Month](#)  
[Review & Approve](#)  
[Reports](#)  
[Admin Menu](#)  
[User Guide](#)  
[Logout](#)

#### Edit Codes

	Inactive	Order	
002: Child Day Care Program Management			
L: Child Care and Development Fund	<input type="checkbox"/>	1	<a href="#">Edit</a>
N: Non-DSS Reimbursable	<input type="checkbox"/>	1	<a href="#">Edit</a>
4: Smart Start	<input type="checkbox"/>	1	<a href="#">Edit</a>
005: Diagnostic and Treatment Services (Non-Residential) -- Adoption			
W: Work First Non-DSS Reimbursable	<input type="checkbox"/>	1	<a href="#">Edit</a>
N: Non-DSS Reimbursable	<input type="checkbox"/>	1	<a href="#">Edit</a>
P: Permanency Planning - Families for Kids	<input type="checkbox"/>	1	<a href="#">Edit</a>
V: TANF transferred to SSBG	<input type="checkbox"/>	1	<a href="#">Edit</a>
9: Work First Block Grant	<input type="checkbox"/>	1	<a href="#">Edit</a>
009: Adoption Case Management			
N: Non-DSS Reimbursable	<input type="checkbox"/>	1	<a href="#">Edit</a>
P: Permanency Planning - Families for Kids	<input type="checkbox"/>	1	<a href="#">Edit</a>
R: TANF 100% Federally Funded	<input type="checkbox"/>	1	<a href="#">Edit</a>
V: TANF transferred to SSBG	<input type="checkbox"/>	1	<a href="#">Edit</a>
X: SSBG	<input type="checkbox"/>	1	<a href="#">Edit</a>
Z: IV-E Administration Activities	<input type="checkbox"/>	1	<a href="#">Edit</a>





3. Edit the status and/or sort order for the code. Please note that you may enter values between 1 and 20 for the sort order. Higher values will be displayed first.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Edit Code**

**002: Child Day Care Program Management**

**L: Child Care and Development Fund**

Inactive ☐

Sort Order

Update Cancel

4. Click 'Update' to save your changes.

## Manage Expected Minimum Minutes

Monthly daysheet views display an 'Expected Minimum' below the monthly totals. Occasionally, expected minimums need to be adjusted due to the way that holiday time is calculated.

1. Click on the 'Manage Expected Minimum Minutes' link on the Admin Menu page.
2. To edit the expected minimum for an existing month, click on the 'Edit' link next to the month. To edit the expected minimum for a new month, click on the 'Add Minutes Adjuster' link at the top of the page.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Manage Expected Minimum Minutes**

Add Minutes Adjuster

Month	Year	Adjustment	
August	2014	0	Edit
July	2014	120	Edit

3. Enter the number of minutes to subtract from the expected minimum. To increase the expected minimum, enter a negative number.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Edit Expected Minimum Minutes Adjustment**

August 2014

Expected Minimum Minutes Adjustment

[Update](#) [Cancel](#)

4. Click 'Update' to save your changes.

## Upload Data to State

Once users have certified their daysheets and supervisors have approved all of the records, the Finance user can upload daysheet data to the state.

1. Click on the 'Upload Data to State' link on the Admin Menu page.
2. Optionally, select the 'Print Summary Report' to print a report of all daysheets. This report can be used to identify workers who still need to certify their daysheets. If there are daysheets that have not yet been certified/approved, you will be shown a list of supervisors with workers that are awaiting certification/approval.

3. Enter your RACF User ID and Password. Click 'Upload Now' to submit the daysheet data to the State.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

**Upload**  
[Print Summary Report](#)

**July 2014**

Data Status: Approved  
Last Upload: ( none )  
RACF User ID:   
Password:

4. Finance users will need to enter their State credentials in order to submit the data.
5. A few hours later, finance users should be able to run a report on the State Data Warehouse system to verify complete and accurate submission of daysheet data.

## Lock/Unlock Daysheets

After daysheets are uploaded to the state, the system will automatically lock records for the uploaded month, preventing users from making changes to their daysheet entries. If corrections need to be made, the month must first be unlocked by an admin.

1. Click on the 'Show Upload History' link on the Admin Menu page.

2. Click on the 'Edit' link next to the month that needs to be unlocked.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

### Upload History

	Month	Year	Locked?	Comments
<a href="#">Edit</a>	June	2014	True	
<a href="#">Edit</a>	May	2014	True	
<a href="#">Edit</a>	April	2014	True	
<a href="#">Edit</a>	March	2014	True	

3. Uncheck the 'Is Upload Locked?' checkbox and enter a reason for unlocking in the 'Comments' section.

**NCDSS Daysheets**

Home  
Today's Daysheet  
Current Month  
Last Month  
Review & Approve  
Reports  
Admin Menu  
User Guide  
Logout

### Lock/Unlock Upload

June 2014

Is Upload Locked? ☒

Comments

Update Cancel

4. Click 'Update' to unlock the selected month.

## Reports

The following reports are available to Finance and Admin users:

1. Daysheet Monthly Report
2. Daysheet Summary Report

3. Program/Service Code Monthly Report
4. Daysheet Monthly Report By SIS and Worker
5. Supervisor List With Workers
6. Daysheets Certified by Another Worker

To run these reports, select 'Reports' from the main menu. Select the appropriate report parameters and click 'Run' next to the report. All reports will be provided in PDF format.