informationinc.

NCDSS Day Sheets - Admin Guide

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Contents

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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.

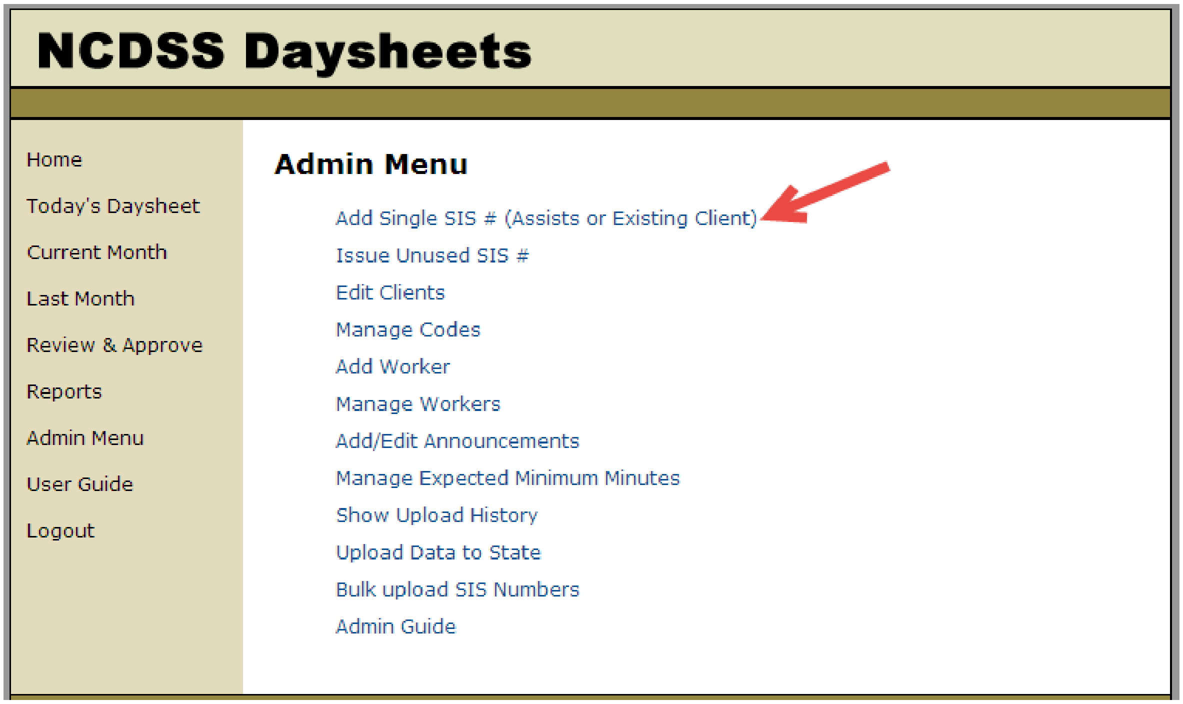
Workers generally only have access to see their own time entries. If they supervise other employees, however, they also can review the time entered by their team members. Typical use of the system by these user types involves entering time on a daily basis, certifying their own time at the end of each 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 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.

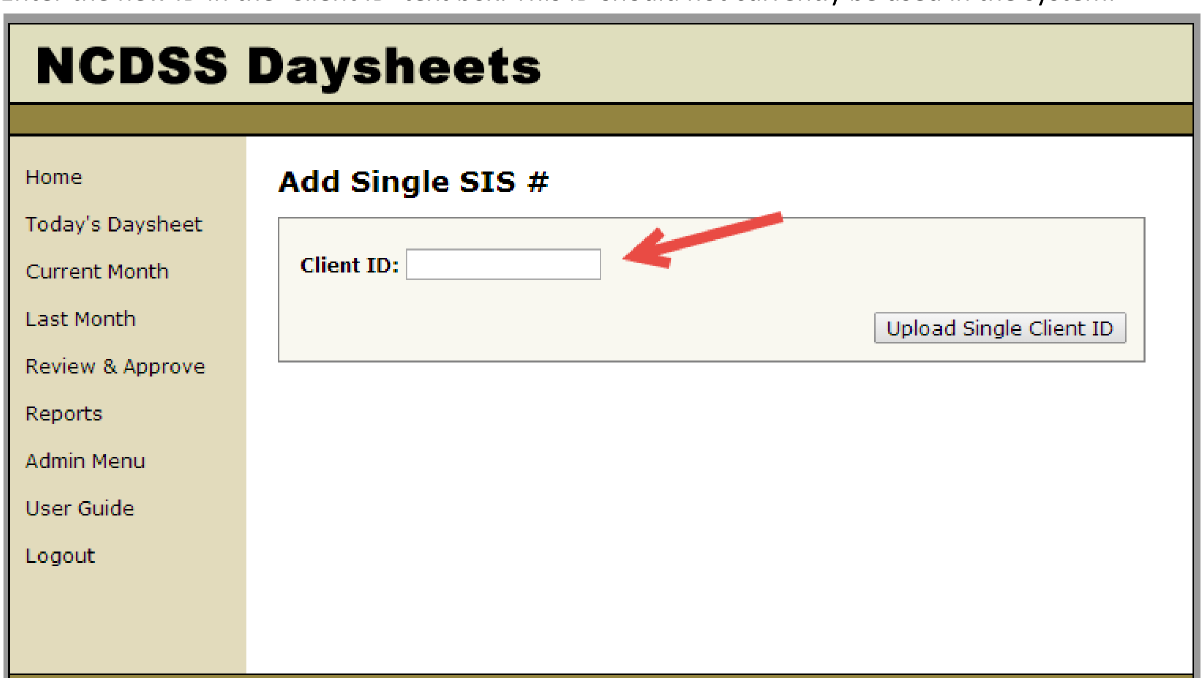
Client information is entered into the system by the Admin or Clerical users. SIS numbers (Client Ids) sent from the state can be uploaded in batch using a text file. This creates 'unused' SIS numbers which can later be assigned to new clients. Alternatively, SIS numbers can be added one at a time. To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

Adding Clients - Single Client ID

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

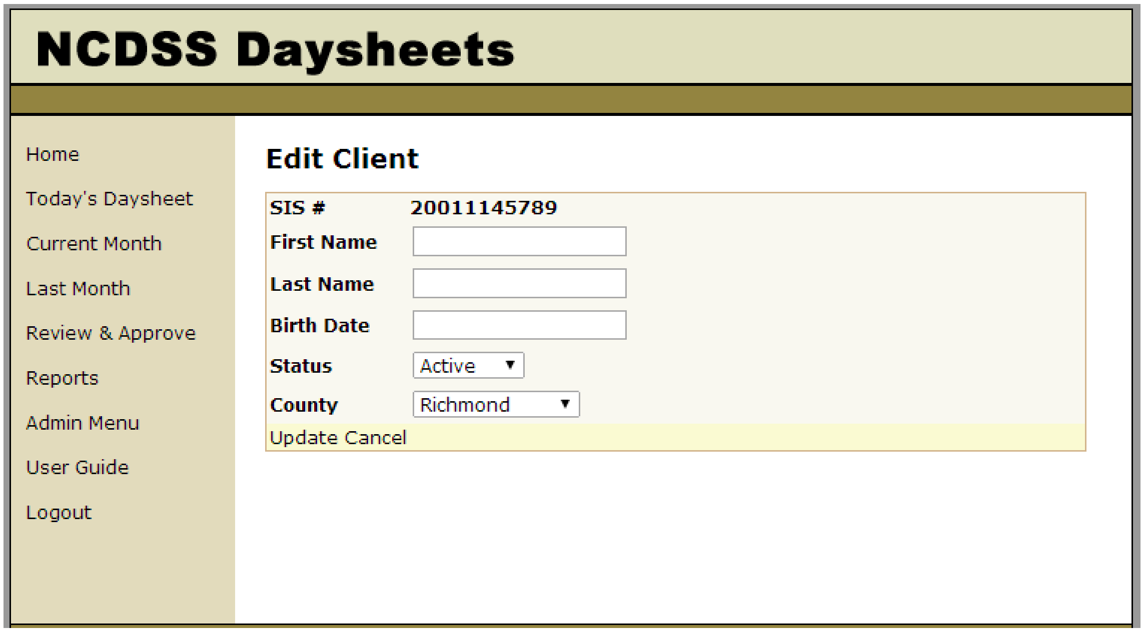


2. Enter the new ID in the 'Client ID' text box. This ID should not currently be used in the system.



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.

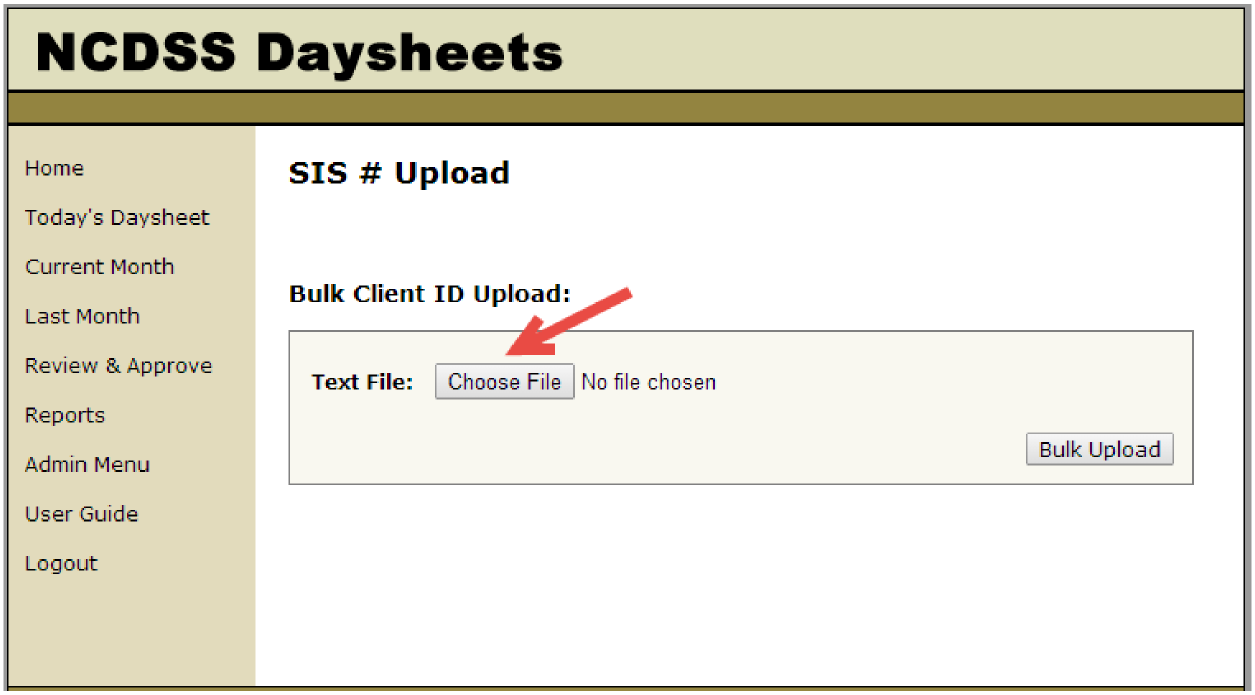
7. Click 'Update' to create the new Client.

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.

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

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

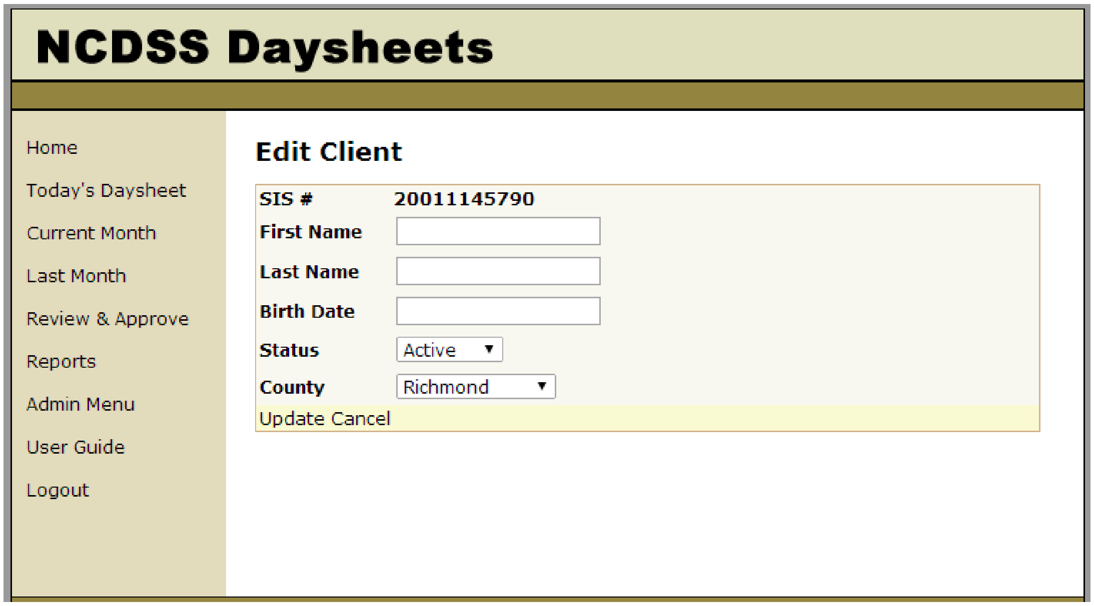


3. Click 'Bulk Upload'. Client placeholders will be created in the system and marked as 'unused'. Admin and clerical users can assign these placeholders to new clients.

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.

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



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

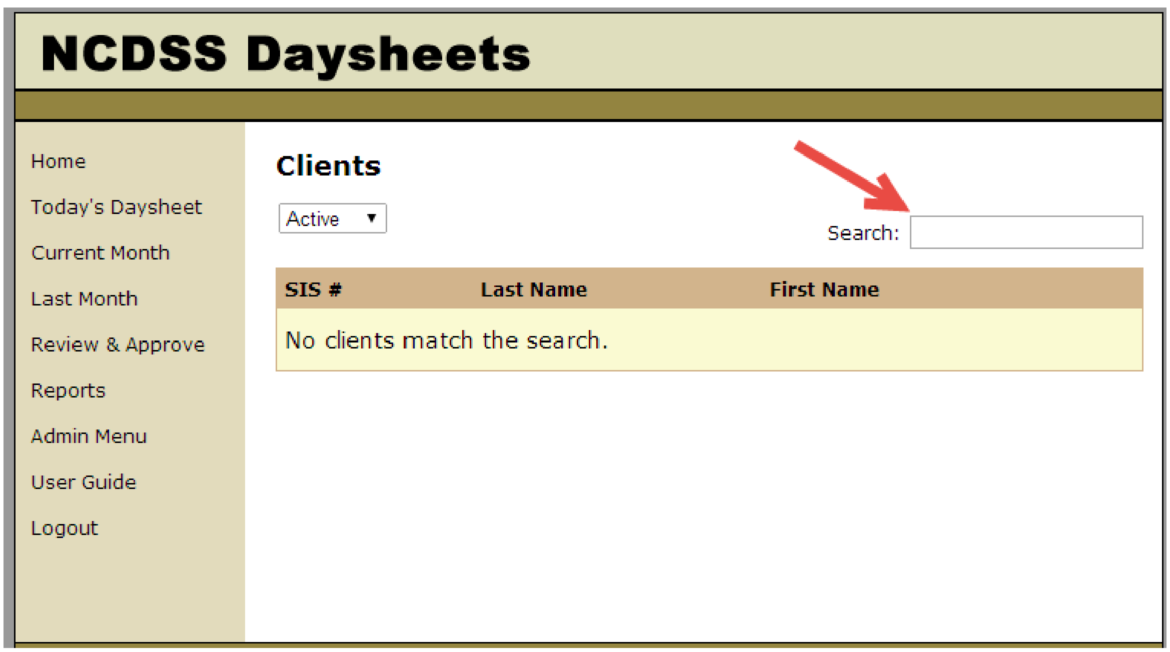
4. Select a County to indicate the client ID was issued in another county (used for assists). The ‘County’ drop down will default to your county.

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

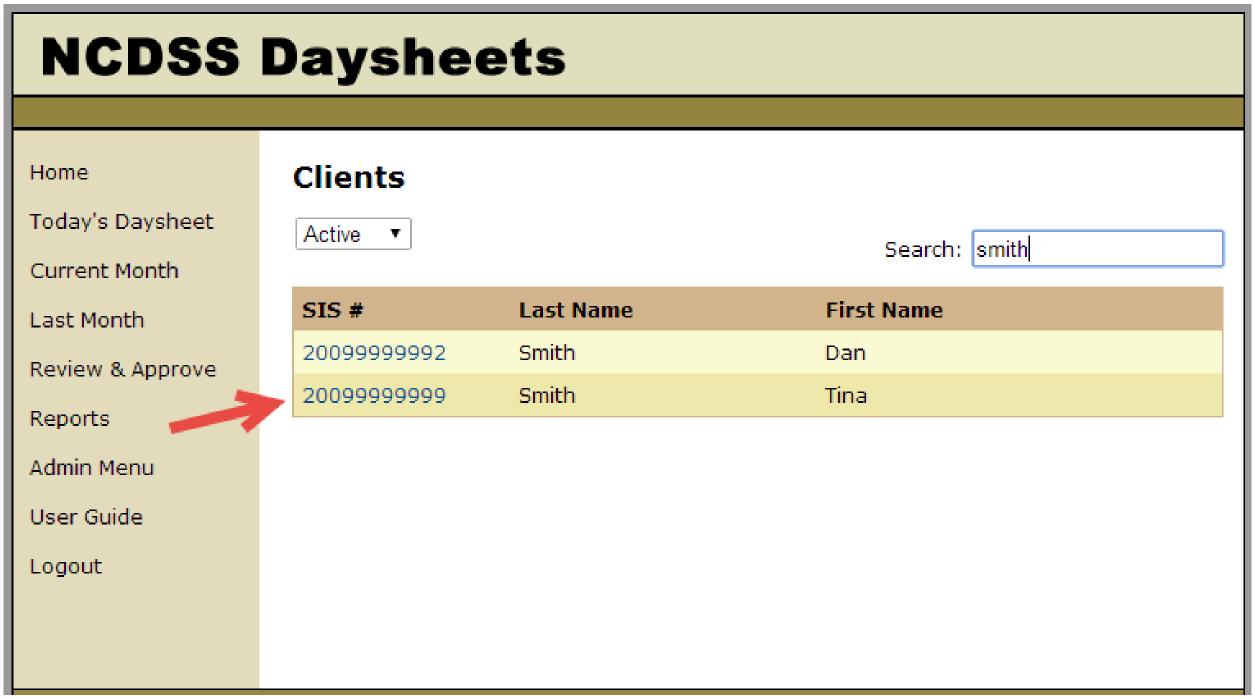
Edit Clients

1. Click on the 'Edit Clients' link on the Admin Menu page.

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.



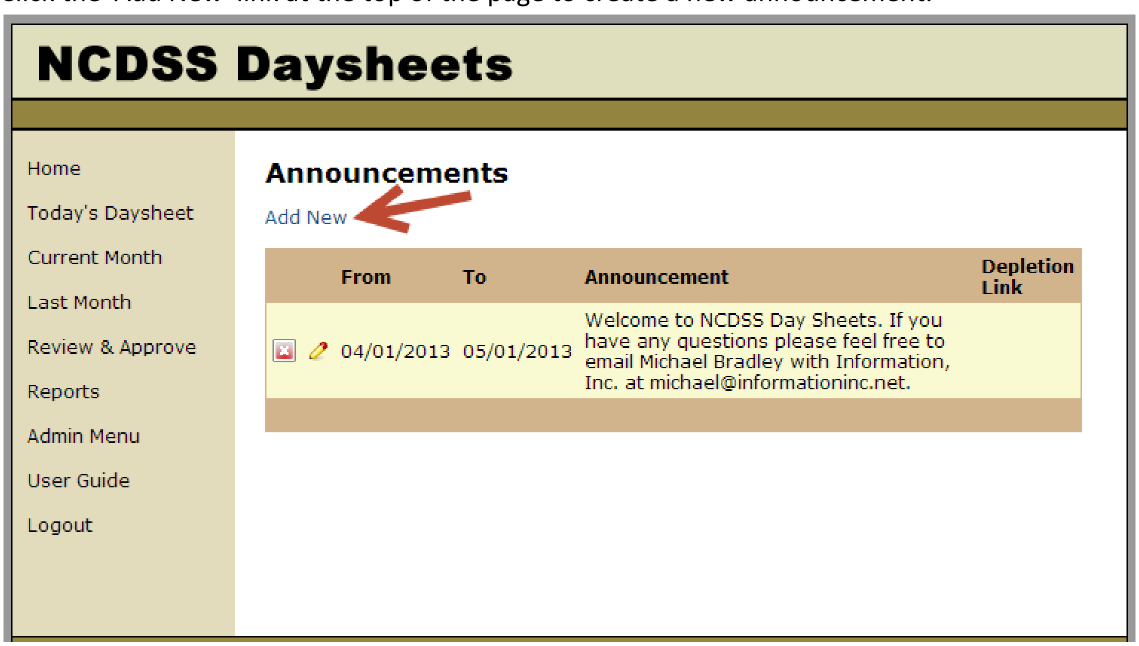
4. Make any necessary updates and click the 'Update' link to complete the changes.

Add/Edit Announcements

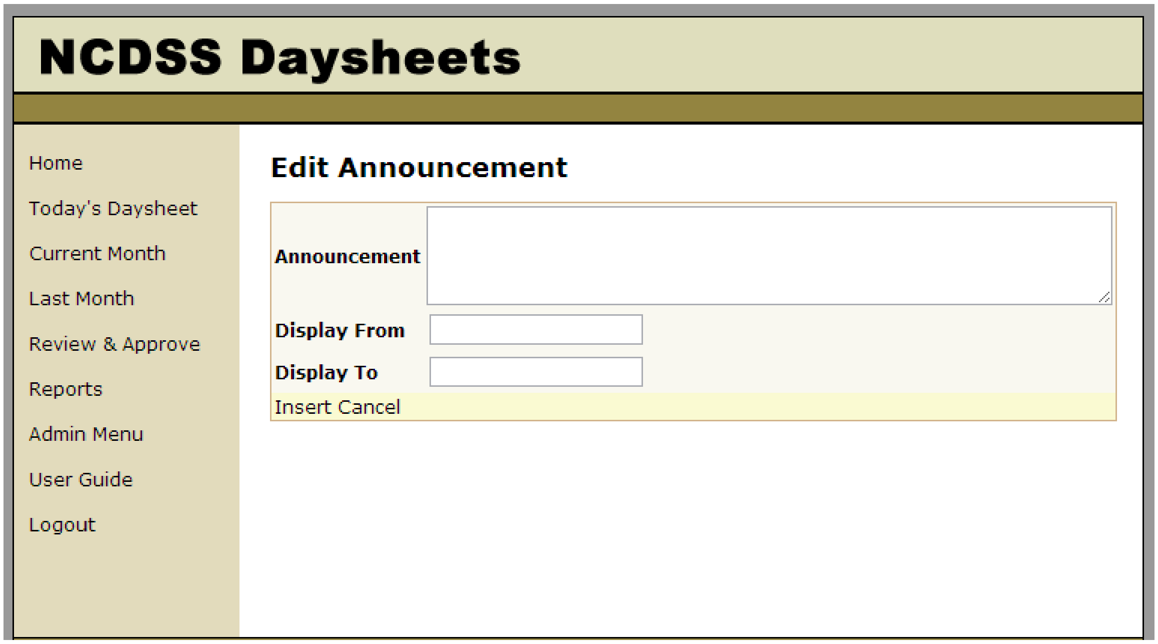
Announcements are displayed on the home page and can be customized by administrators.

1. Click on the 'Add/Edit Announcements' link on the Admin Menu page.

2. Click the 'Add New' link at the top of the page to create a new announcement.



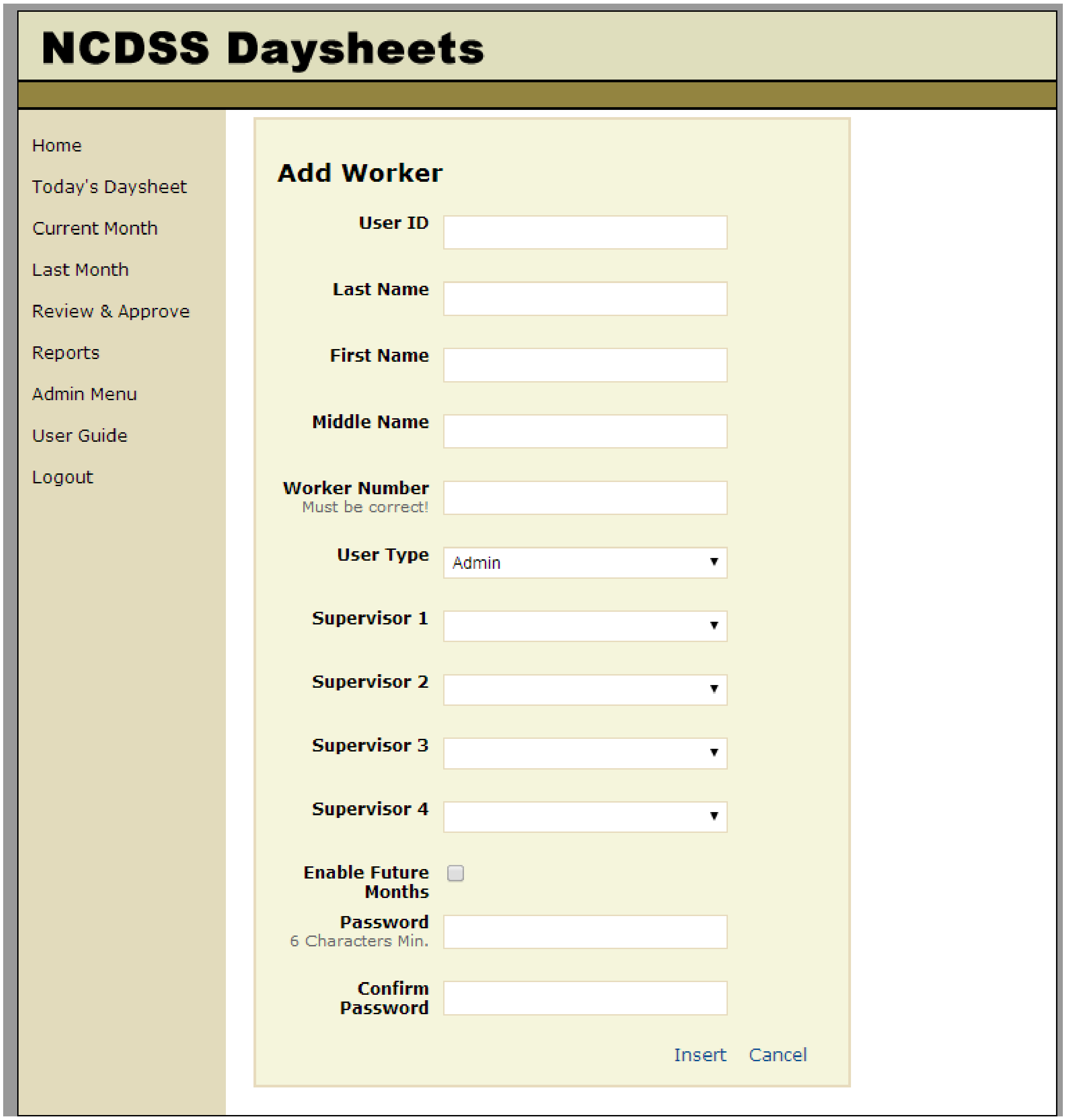
3. Enter in announcement text and a display from and display to date. If desired, announcements can be created and published at a later date.



4. Click 'Insert' to create the announcement.

Add Worker

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



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.

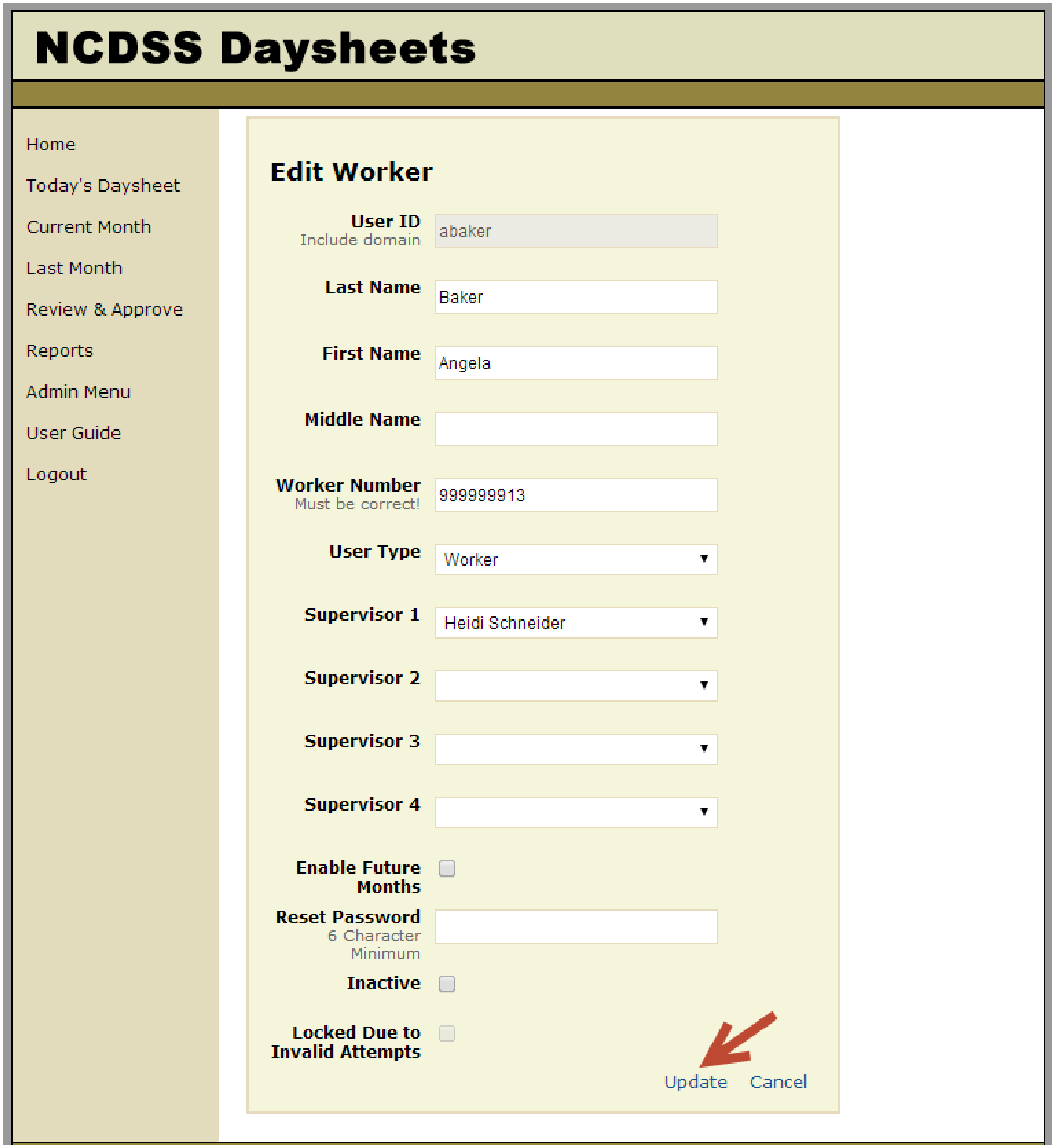
5. Enter and confirm user password.

6. Click 'Insert'.

Manage Workers

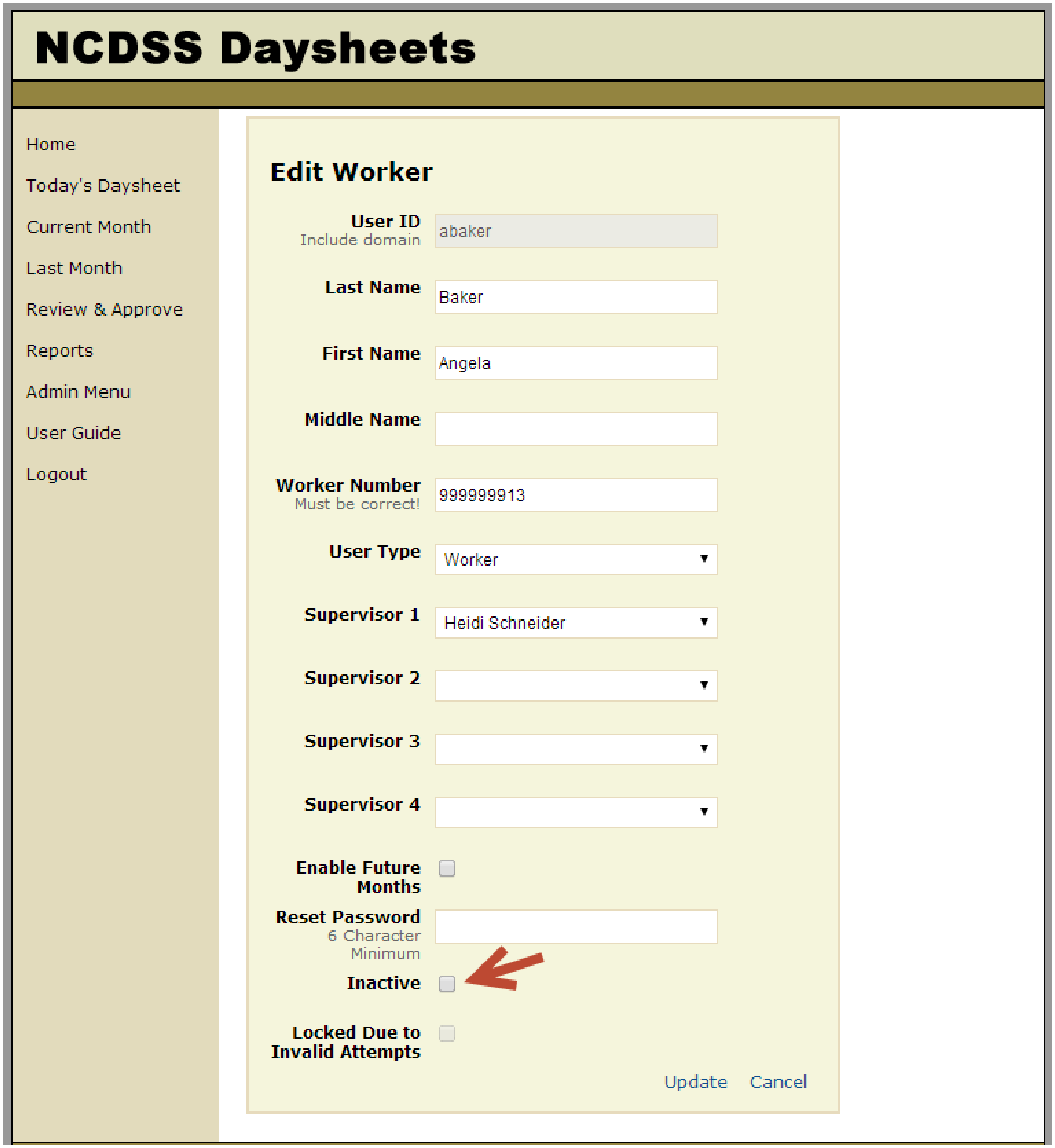
1. Click on the 'Manage Workers' link on the Admin Menu page.

2. Click on the 'Edit' link next to the user you would like to modify.

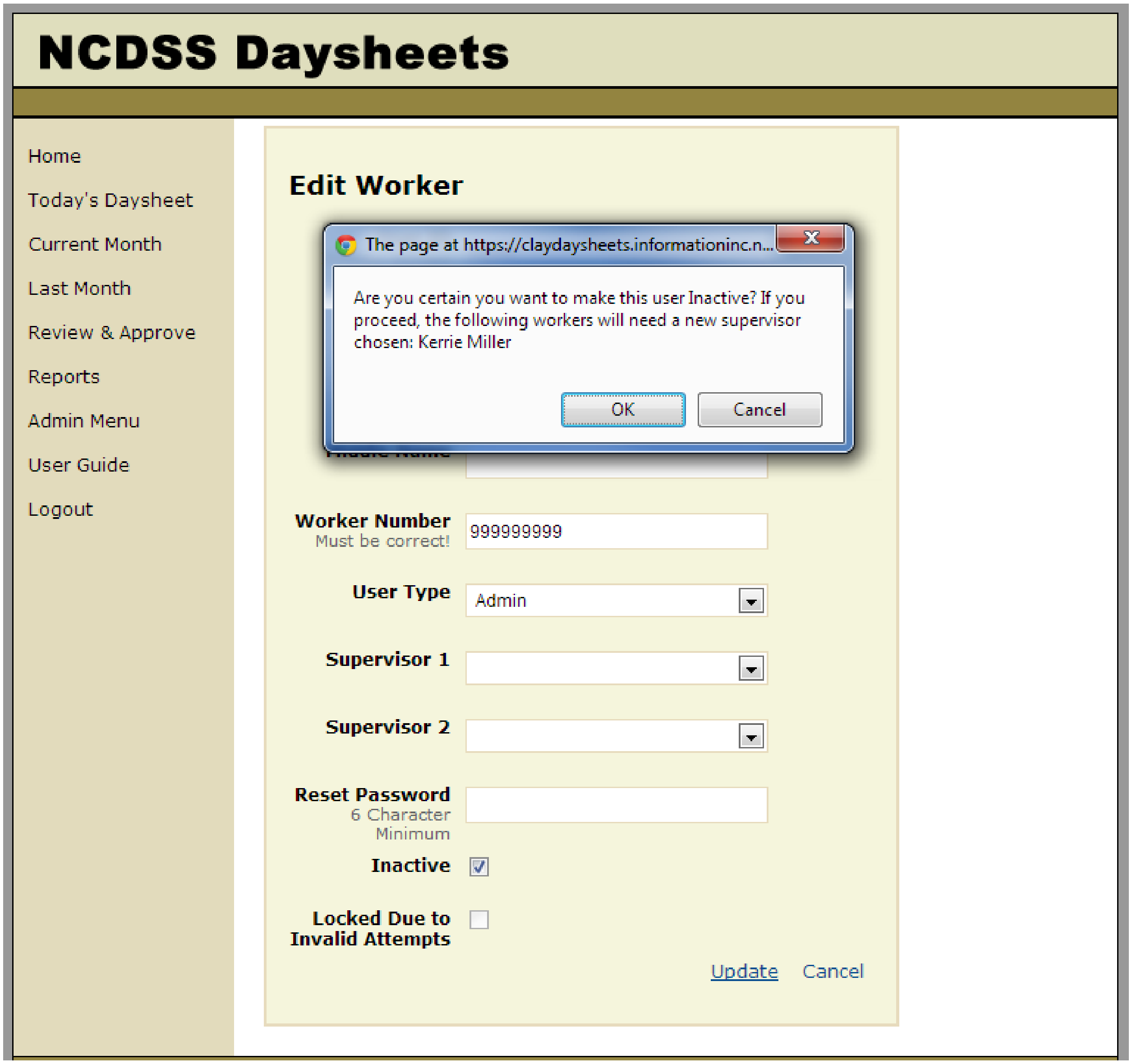


3. Make any necessary updates and click the 'Update' link to complete the changes.

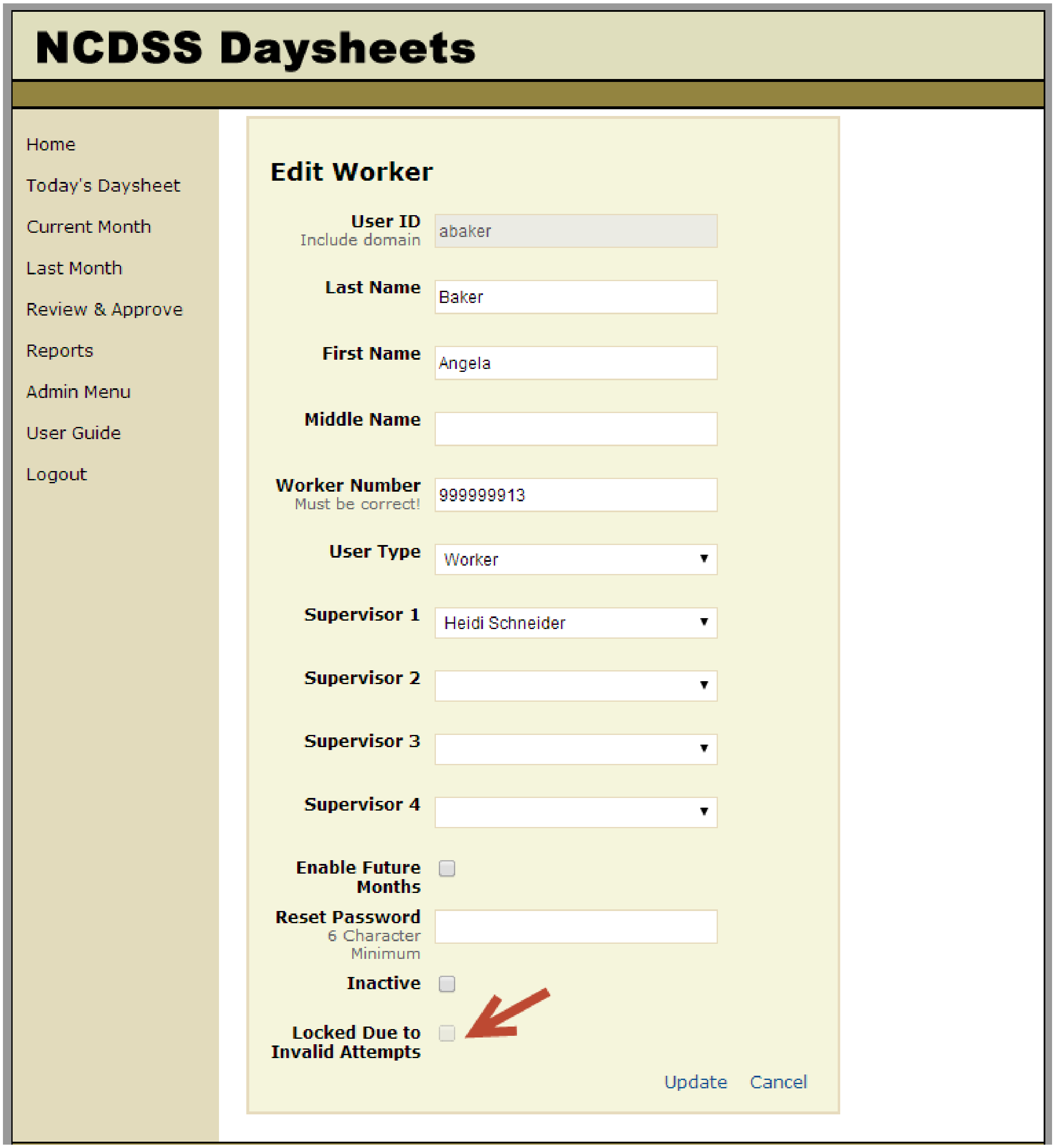
4. To remove a user from the system and prevent logins, check the 'Inactive' checkbox.



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.



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'.

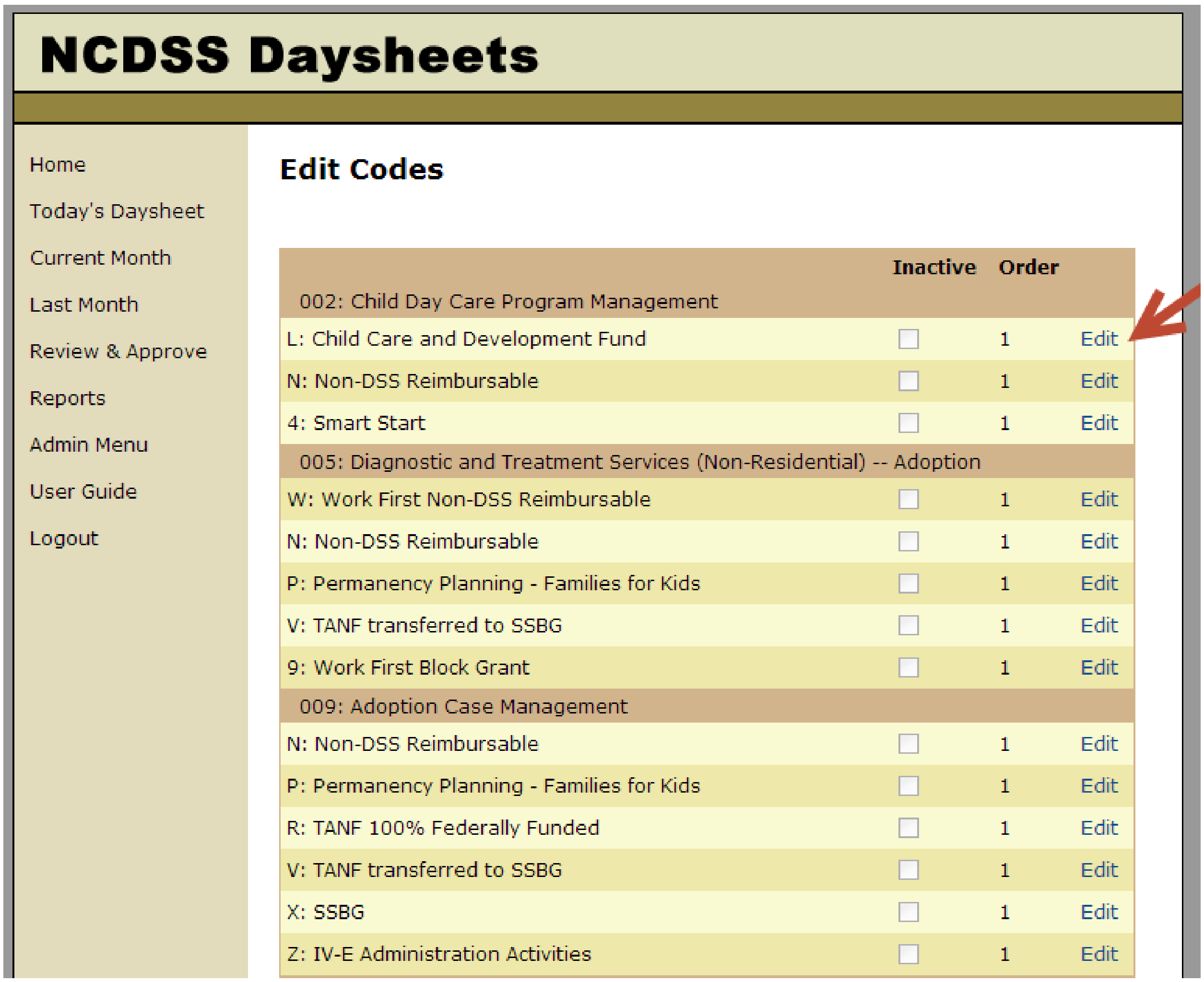


Manage Codes

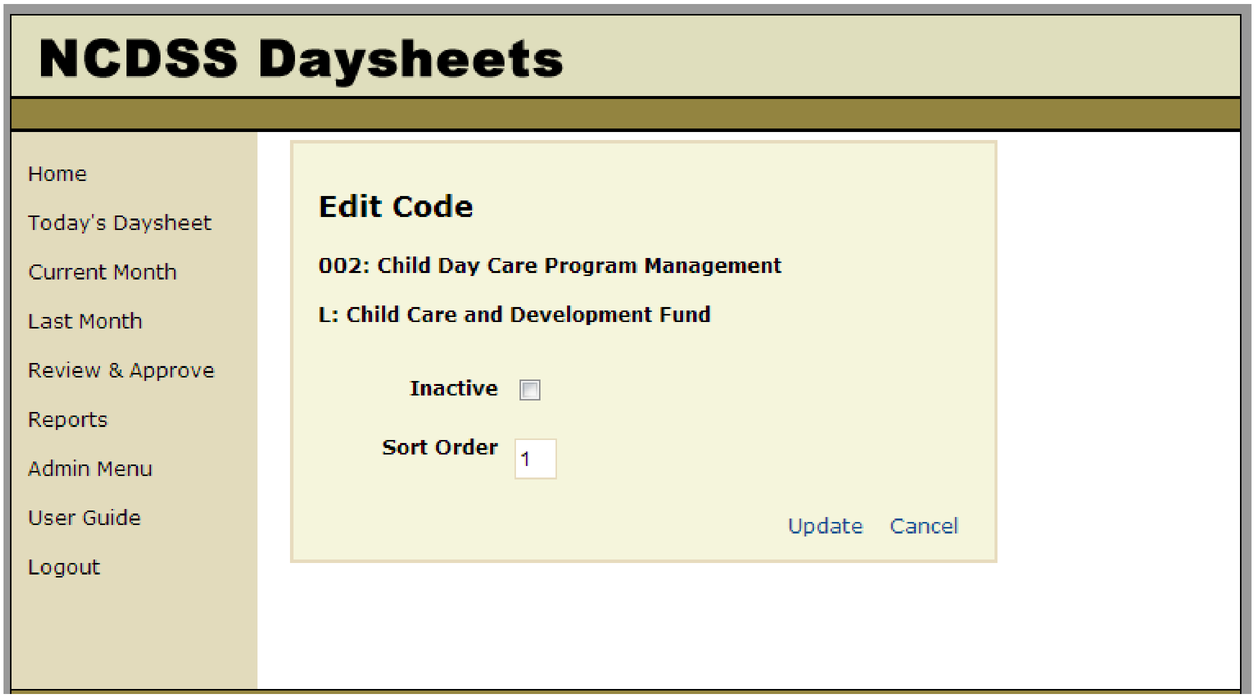
Admin users can manage Program and Service codes, choosing to make certain codes inactive for their workers. The display order can also be changed.

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.



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.



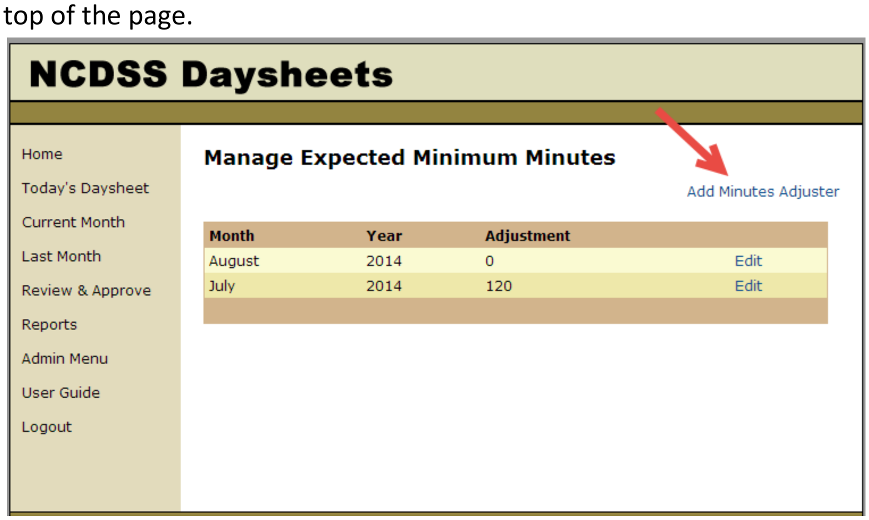
4. Click 'Update' to save your changes.

Manage Expected Minimum Minutes

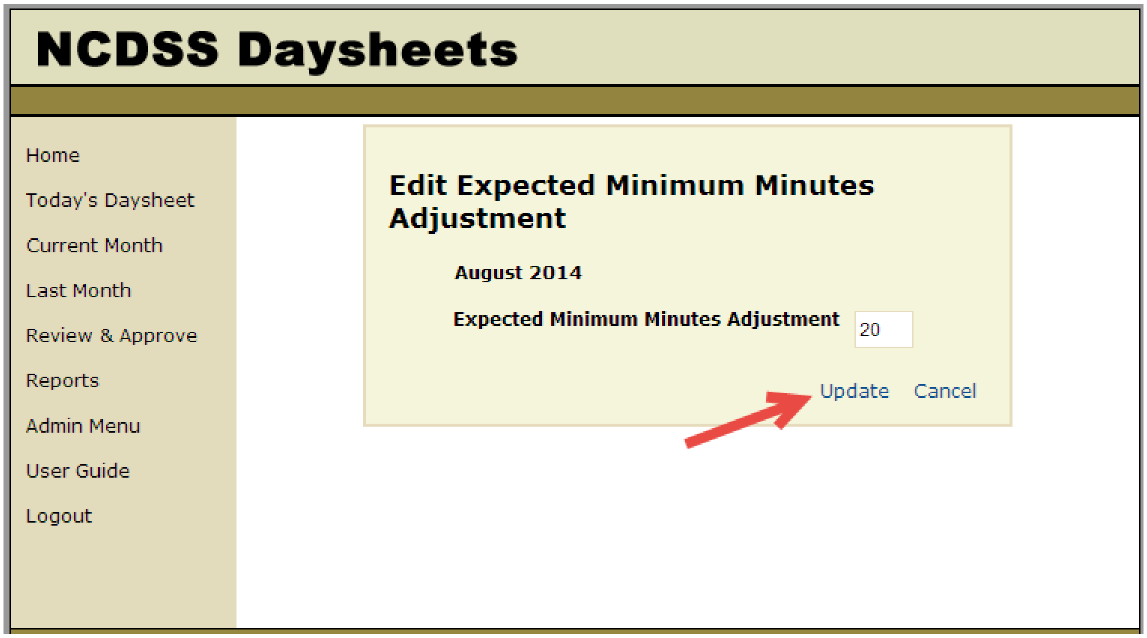
Monthly daysheet views display an 'Expected Minimum' below the monthly totals. Occasionally, expected minimums need to be adjusted due to the way that holiday time is calculated.

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.



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



4. Click ‘Update’ to save your changes.

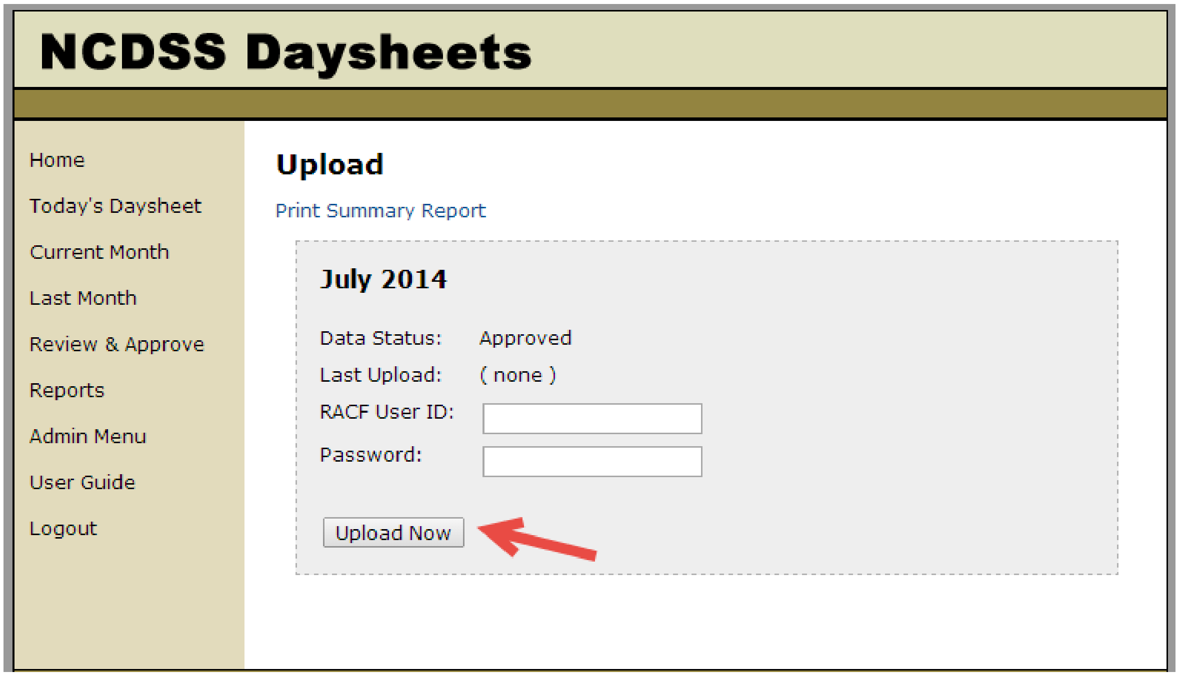
Upload Data to State

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.



4. Finance users will need to enter their State credentials in order to submit the data.

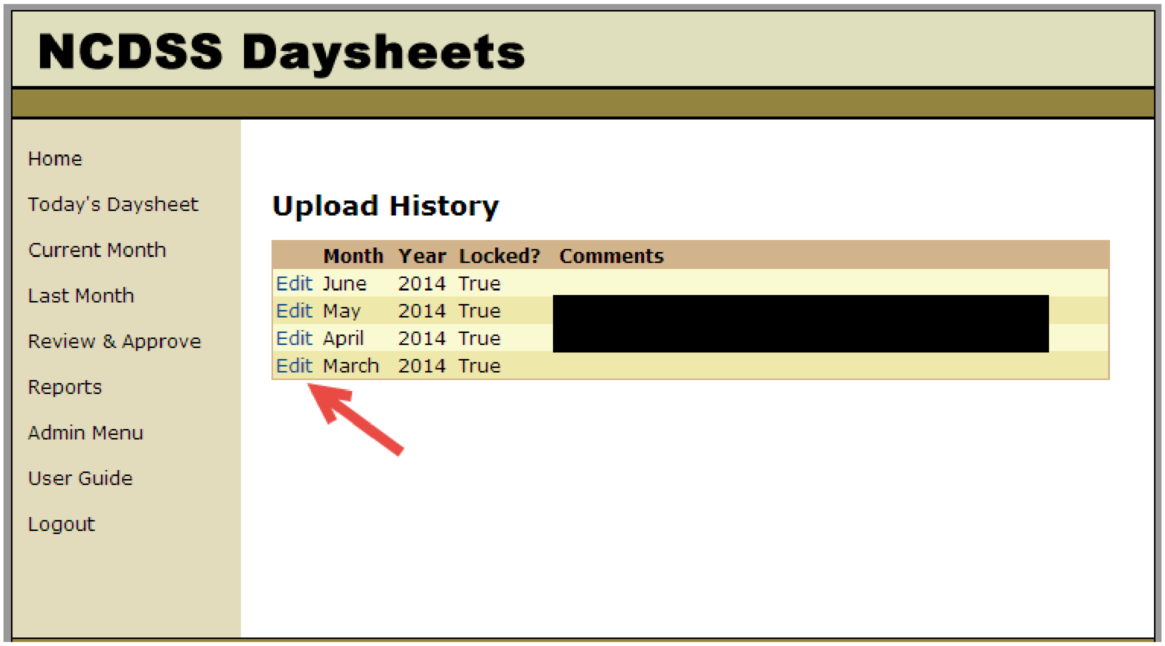
5. A few hours later, finance users should be able to run a report on the State Data Warehouse system to verify complete and accurate submission of daysheet data.

Lock/Unlock Daysheets

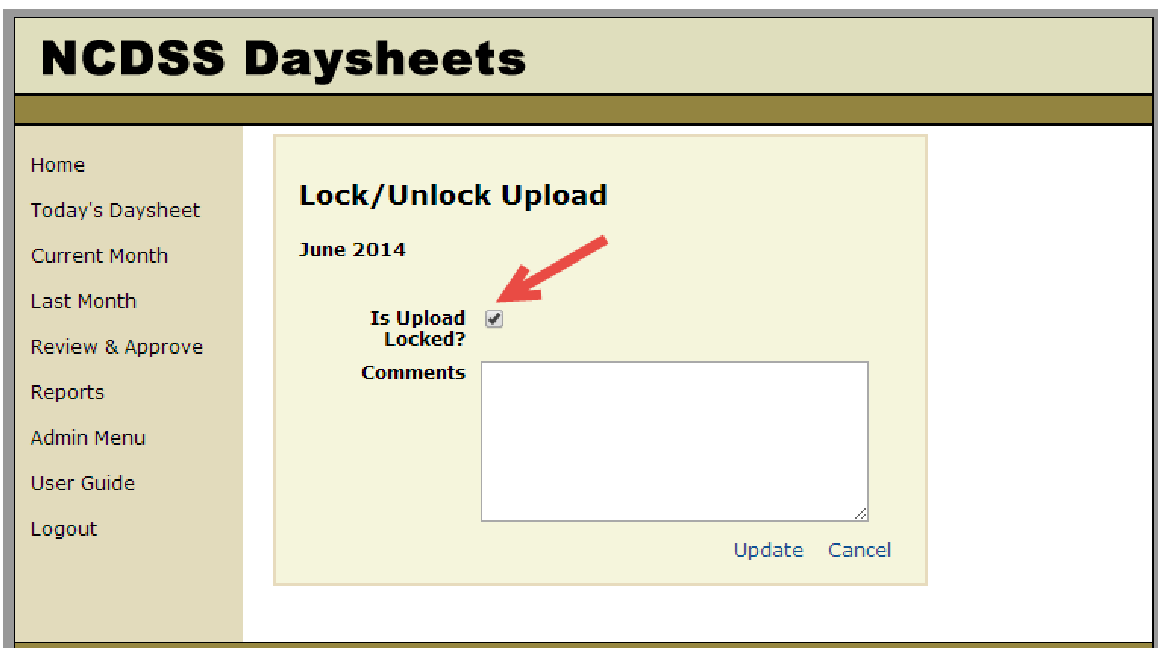
After daysheets are uploaded to the state, the system will automatically lock records for the uploaded month, preventing users from making changes to their daysheet entries. If corrections need to be made, the month must first be unlocked by an admin.

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.



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



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.