informationinc.

NCDSS Day Sheets - User Guide

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NCDSS Day Sheets – User Guide

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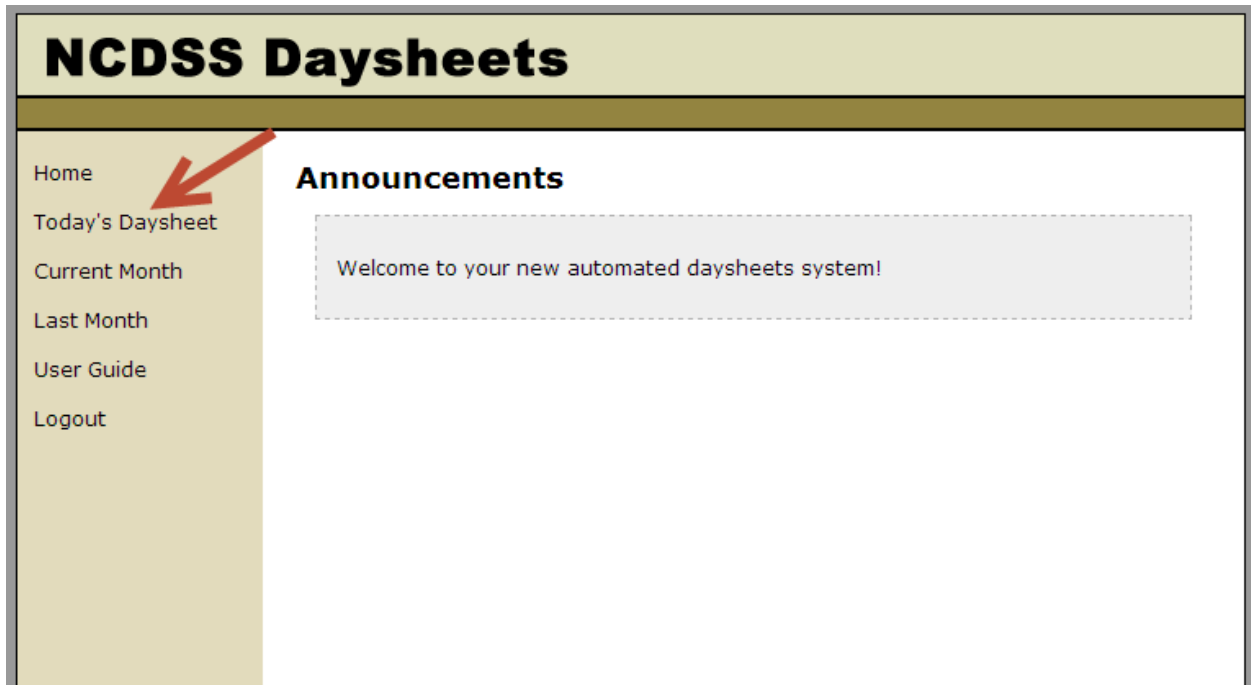
Workers generally only have access to see their own time entries. If they supervise other employees, however, they also can review the time entered by their team members. Typical use of the system by these user types involves entering time on a daily basis, certifying their own time at the end of each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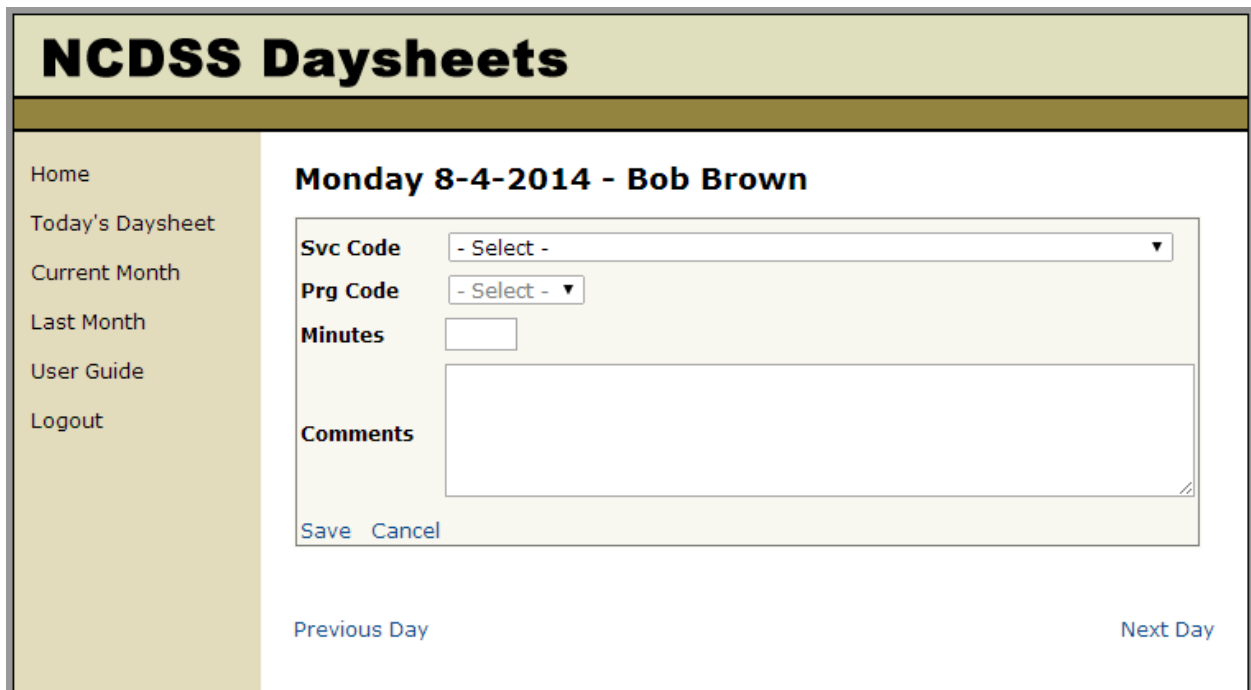
Entering Time Using Today's Daysheet

1. Select the 'Today's Daysheet' menu item from the main navigation.

2. Select a Service Code from the 'Svc Code' drop down. Select a Program Code from the filtered list of program codes.

3. If the Service/Program code requires a SIS number, the SIS # field will be displayed underneath the 'Prg Code' field. Select the client by entering at least three letters of their first or last name or 6

digits of their SIS number in the SIS # field. The SIS # field will display a filtered list of clients matching the characters that have been entered. Select the appropriate client from the filtered list. If a client is not available for selection, please contact your administrator to add the client.

To view a list of recently used clients, click on the lightning bolt icon next to the SIS # field.

You will be shown a pop-up window with your 10 most recently used clients. To select a client, simply click on the client's name.

4. If the Service/Program code does not require a SIS number, the Case Name field will be displayed underneath the 'Prg Code' field. Optionally enter a case name. To view a list of recently used case names, click on the lightning bolt icon next the Case Name field. You will be shown a pop-up window with your 10 most recently used case names. Simply click on a case name to select it.

5. Enter the amount of time spent in minutes.

6. Optionally, enter a note in the comment field.

7. Click 'Save' to create the daysheet.

8. The new daysheet record will be displayed at the bottom of the page.

GA Time

After entering in all of the daysheet records for the day, workers may need to enter some GA time for the remainder of the work day. The NCDSS Daysheet application has a 'Remainder to GA' function that automatically calculates the number of GA minutes for the day, based on the specified number of minutes for your counties' work day (450 or 480 minutes).

To add a record for GA time:

1. Click on the 'Today's Daysheet' link in the main menu.

2. To the right of the daily total, click on the blue 'Remainder to GA' link.

3. This will add a record for GA time.

Editing Today's Daysheet

1. Click on the 'Today's Daysheet' link in the main menu.

2. Click on the pencil icon next to the time entry that you would like to edit.

3. To delete a record, click on the red X icon. You will be prompted to confirm the deletion.

Editing Previous Daysheets

1. Click on the 'Current Month' link in the main menu.

2. You will be shown a list of all of the daysheets for the month. Click the 'Edit Daysheet' link next to the entry that you would like to modify.

NCDSS Daysheets

Home	**August 2014 - Bob Brown**
Today's Daysheet	August 2014 ▾
Current Month	Print Month
Last Month	
User Guide	
Logout	

	Date	Minutes
Edit Daysheet	Friday, August 1, 2014	0
Edit Daysheet	Saturday, August 2, 2014	0
Edit Daysheet	Sunday, August 3, 2014	0
Edit Daysheet	Monday, August 4, 2014	480
Edit Daysheet	Tuesday, August 5, 2014	0
Edit Daysheet	Wednesday, August 6, 2014	0
Edit Daysheet	Thursday, August 7, 2014	0
Edit Daysheet	Friday, August 8, 2014	0
Edit Daysheet	Saturday, August 9, 2014	0
Edit Daysheet	Sunday, August 10, 2014	0
Edit Daysheet	Monday, August 11, 2014	0
Edit Daysheet	Tuesday, August 12, 2014	0
Edit Daysheet	Wednesday, August 13, 2014	0
Edit Daysheet	Thursday, August 14, 2014	0
Edit Daysheet	Friday, August 15, 2014	0
Edit Daysheet	Saturday, August 16, 2014	0
Edit Daysheet	Sunday, August 17, 2014	0
Edit Daysheet	Monday, August 18, 2014	0
Edit Daysheet	Tuesday, August 19, 2014	0
Edit Daysheet	Wednesday, August 20, 2014	0
Edit Daysheet	Thursday, August 21, 2014	0
Edit Daysheet	Friday, August 22, 2014	0
Edit Daysheet	Saturday, August 23, 2014	0
Edit Daysheet	Sunday, August 24, 2014	0
Edit Daysheet	Monday, August 25, 2014	0
Edit Daysheet	Tuesday, August 26, 2014	0
Edit Daysheet	Wednesday, August 27, 2014	0
Edit Daysheet	Thursday, August 28, 2014	0
Edit Daysheet	Friday, August 29, 2014	0
Edit Daysheet	Saturday, August 30, 2014	0
Edit Daysheet	Sunday, August 31, 2014	0
		Month Total: 480
		Expected Minimum: 10,080

3. Edit the daysheet record and when finished, click 'Save'.

Certify Time

Usually time is certified within the first couple of days of the following month. Time must be certified prior to supervisor approval, therefore it is important that workers take care of this as soon as possible.

1. Select 'Last Month' from the main menu.

2. Review time entered for the previous month. To print a report of your monthly time, select 'Print Report' at the top of the page.

3. Once records have been reviewed, click the 'Certify Month' button at the bottom of the page.

NCDSS Daysheets

August 2014 - Bob Brown

Home	August 2014 ▼	
Today's Daysheet		
Current Month	Print Month	
Last Month		
User Guide	**Date**	**Minutes**
Logout	Edit Daysheet Friday, August 1, 2014	0
	Edit Daysheet Saturday, August 2, 2014	0
	Edit Daysheet Sunday, August 3, 2014	0
	Edit Daysheet Monday, August 4, 2014	480
	Edit Daysheet Tuesday, August 5, 2014	0
	Edit Daysheet Wednesday, August 6, 2014	0
	Edit Daysheet Thursday, August 7, 2014	0
	Edit Daysheet Friday, August 8, 2014	0
	Edit Daysheet Saturday, August 9, 2014	0
	Edit Daysheet Sunday, August 10, 2014	0
	Edit Daysheet Monday, August 11, 2014	0
	Edit Daysheet Tuesday, August 12, 2014	0
	Edit Daysheet Wednesday, August 13, 2014	0
	Edit Daysheet Thursday, August 14, 2014	0
	Edit Daysheet Friday, August 15, 2014	0
	Edit Daysheet Saturday, August 16, 2014	0
	Edit Daysheet Sunday, August 17, 2014	0
	Edit Daysheet Monday, August 18, 2014	0
	Edit Daysheet Tuesday, August 19, 2014	0
	Edit Daysheet Wednesday, August 20, 2014	0
	Edit Daysheet Thursday, August 21, 2014	0
	Edit Daysheet Friday, August 22, 2014	0
	Edit Daysheet Saturday, August 23, 2014	0
	Edit Daysheet Sunday, August 24, 2014	0
	Edit Daysheet Monday, August 25, 2014	0
	Edit Daysheet Tuesday, August 26, 2014	0
	Edit Daysheet Wednesday, August 27, 2014	0
	Edit Daysheet Thursday, August 28, 2014	0
	Edit Daysheet Friday, August 29, 2014	0
	Edit Daysheet Saturday, August 30, 2014	0
	Edit Daysheet Sunday, August 31, 2014	0
	Month Total: 480	
	Expected Minimum: 10,080	

I certify that the daysheet entries for this month are both complete and accurate.

[Certify Month]

4. You will be prompted to confirm the certification. Click 'Yes' to proceed.

Approval of Certified Data (Supervisor)

Supervisors must review and approve timesheets for each of their team members. **Please note that this process must be repeated for each worker and that workers must certify their timesheets prior to approval.**

1. Select 'Review & Approve' from the main menu.

2. Click on the 'Review' link next to each of the workers to review their timesheets.

3. After reviewing timesheets for accuracy, click 'Approve Month'.

NCDSS Daysheets

Home	**August 2014 - Bob Brown**	
Today's Daysheet	August 2014 ▼	
Current Month		
	Print Month	
Last Month		

	Date	**Minutes**
Review & Approve	Edit Daysheet	Friday, August 1, 2014	0
	Edit Daysheet	Saturday, August 2, 2014	0
Reports	Edit Daysheet	Sunday, August 3, 2014	0
User Guide	Edit Daysheet	Monday, August 4, 2014	480
	Edit Daysheet	Tuesday, August 5, 2014	0
Logout	Edit Daysheet	Wednesday, August 6, 2014	0
	Edit Daysheet	Thursday, August 7, 2014	0
	Edit Daysheet	Friday, August 8, 2014	0
	Edit Daysheet	Saturday, August 9, 2014	0
	Edit Daysheet	Sunday, August 10, 2014	0
	Edit Daysheet	Monday, August 11, 2014	0
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	Edit Daysheet	Saturday, August 23, 2014	0
	Edit Daysheet	Sunday, August 24, 2014	0
	Edit Daysheet	Monday, August 25, 2014	0
	Edit Daysheet	Tuesday, August 26, 2014	0
	Edit Daysheet	Wednesday, August 27, 2014	0
	Edit Daysheet	Thursday, August 28, 2014	0
	Edit Daysheet	Friday, August 29, 2014	0
	Edit Daysheet	Saturday, August 30, 2014	0
	Edit Daysheet	Sunday, August 31, 2014	0

Month Total: 480
Expected Minimum: 10,080

This daysheet month has been certified, but not approved

[Undo Certification] [Approve Month]

4. If a worker is unable to certify daysheets for the month, daysheets may be certified and approved by a supervisor by clicking the 'Certify & Approve' button. This button is only displayed for months that have not yet been certified. Please note that the 'Daysheets Certified by Another Worker' report can be used to view a list of daysheets that were certified by another user.

Reports (Supervisor)

The following reports are available to Supervisors:

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.