SERVICES INFORMATION SYSTEM (SIS)
USERS MANUAL - UPDATE

CHANGE NO. 01-16

DATE: February 29, 2016

TO: Economic Services and Work First Employment Services Staff,
                  Supervisors and Program Managers;
                  Data Entry Staff; County Automated Day Sheet Applications
                  Administrators
                  County Finance Officers

EFFECTIVE: March 1, 2016

In preparation for the potential statewide implementation of the NC FAST- CSDW-Day Sheet Interface (previously referred to as "Plan A"), a Pilot of the Interface will be conducted between March 1, 2016 and June 30, 2016 in Guilford, Lenoir, Martin, Orange and Wake counties.

As previously described in the recorded webinar (no longer accessible online) referenced in CN-SIS-02-13, workers in these counties actively engaged in using NC FAST to process applications, recertifications and other case management related activities, will code their time on the DSS-4263 using Service Codes 891, 892 and 890 with a new Program Code "NCF".

Briefly, after the monthly cutoff for day sheets and prior to processing the data, the NC FAST-CSDW-Day Sheet Interface will extract these records and use data from NC FAST on the number of applications, recertifications and active cases, by program (Medicaid, Cash Assistance, Special Assistance, Work First Employment Services, etc.) in each county to allocate the workers' time coded to "NCF" to the various fund sources for the programs, based on the relative percentages of each per activity. The resulting time records will then be re-inserted into the original data for each county. At this point, the month-end processes will be run and the usual data files and reports will be generated.

The process should be "transparent" with respect to most business processes in the counties with the following exceptions:

1) Workers coding their time to Service Codes 891, 892 and 890 on the DSS-4263 will no longer use Program Codes FS, HC, MA, PA, RM, SA, T or 9 to record their time. All time to these three Service Codes will be recorded to the new Program Code "NCF".
2) The day sheet data output from the Interface will look essentially the same as it always has, with time coded to Service Codes 891, 892 and 890 on the DSS-4263 paired with Program Codes FS, HC, MA, PA, RM, SA, T or 9, with one exception. Whereas before, all time associated with Work First Cash Assistance and Work First Employment Services was coded by the workers to Program Code 9 - Work First Block Grant (or MOE), the Interface will, by default, allocate time for Work First Cash Assistance to Program Code 9 (as before) and, by default, allocate time for Work First Employment Services to Program Code R – TANF 100% Federal. (County Finance Officers preparing the DSS-1571 will have the option of moving costs from one fund source to the other. Instructions will be issued by the DHHS Controller's Office.)
3) As a result of the Interface process, because time code to 890, 891 and 892 will be allocated between Medicaid and NC Health Choice based on actual counts of applications, recertifications and active cases, there will be no need to apply Penetration

Rates to the workers' time attributed to NC Health Choice for these Service Codes within NC CoReLs (formerly the Maximus TEC application). Again, instructions from the DHHS Controller's Office are forthcoming.

The results of the Pilot effort will be evaluated and a decision made regarding expanding the use of the NC FAST-CSDW-Day Sheet interface to additional counties or statewide.

To this end, the Services Information System User's Manual has been revised to incorporate the following changes.

Program Code NCF – NC FAST Activity is being added to the following Service Codes:

        890 – <u>NC FAST - Case Management</u>
            Use on the DSS-4263 (no Client ID required)

        891 – <u>NC FAST - Applications</u>
            Use on the DSS-4263 (no Client ID required)

        892 – <u>NC FAST - Recertifications</u>
            Use on the DSS-4263 (no Client ID required)

Note: **At this time, Program Code NCF is valid for use only in the following counties: Guilford (041), Lenoir (054), Martin (058), Orange (068), and Wake (092)**

Other Changes

There is an additional important change for counties NOT participating in the NC FAST-CSDW-Day Sheet Interface pilot. Previous instructions to counties in <u>CN-SIS-02-13</u> specified that Program Code R - TANF 100% Federally Funded, although valid for Program Codes 890, 891 and 892, should not be used on the DSS-4263 with these codes. **That policy is now changing for coding under "Plan B".**

As of March 1, 2016, counties <u>should</u> use Program Code R - TANF 100% Federally Funded with Service Codes 890, 891 and 892, but <u>ONLY</u> when performing activities in NC FAST pertaining to <u>Work First Employment Services</u>. Counties should continue to code activities related to Work First Cash Assistance and Work First Emergency Assistance to Program Code 9 – Work First Block Grant (MOE). (As stated in Item 2 above, county Finance Officers preparing the DSS-1571 will have the option of moving costs from one fund source to the other for these codes. Instructions will be issued by the DHHS Controller's Office.)

The SIS User's Manual has been updated with these changes and is available in PDF format (see below). This version is the same as the on-line version, which is the official version of the SIS User's Manual.

If you do not have access to the on-line manuals, you may obtain the PDF file on disk or via e-mail, or a hard copy (limit one per county) of the SIS User's Manual by contacting Performance Management/Reporting and Evaluation Management Section at 919-527-6260.

INSTRUCTIONS FOR MAINTAINING SIS USERS MANUAL

1. Go to the DSS On-Line Manuals website at
   http://info.dhhs.state.nc.us/olm/manuals/dss/rim-01/chg/index.htm

2. Click on Change No. 01-16

To maintain a "soft copy" of the SIS User's Manual:

3. Click on the "SIS Manual" link at the bottom of the page to download the revised manual and save it to disk, and

4. Click on the "DSS-5027" and "DSS-4263" links to download replicas of the forms and save them to disk.

To maintain your current hard copy of the SIS User's Manual:

5. Click on the "CN – 01-16" and "CN – 01-16 ATTACHMENTS" links at the bottom of the page to download the Change Notice and the attachment documents, and

6. Open the downloaded files using Adobe Acrobat Reader and print the pages. Insert or replace the appropriate pages in your current hard copy as indicated below.

Or, if you do not currently have a hard copy:

7. Click on the "SIS Manual" link at the bottom of the page to download the revised manual, and

8. Click on the "DSS-5027" and "DSS-4263" links to download replicas of the forms.

9. Open the downloaded files using Adobe Acrobat Reader. Print the form and the entire manual.

Note: Adobe Acrobat Reader may be downloaded for free at http://www.adobe.com/

To update your current hardcopy of the manual:

REMOVE	INSERT
Instructions for Worker Daily Report of Services (DSS-4263)	**Instructions for Worker Daily Report of Services (DSS-4263)**
page 8, dated 10-01-2015	page 8, dated 03-01-2016
page 9, dated 10-01-2013	page 9, dated 03-01-2016
Appendix B	**Appendix B**
page B-9, dated 11-01-2014	page B-9, dated 03-01-2016
Appendix C	**Appendix C**
page C-7, dated 11-01-2014	page C-7, dated 03-01-2016

Hank Bowers, Chief
Performance Management/Reporting and
Evaluation Management Section

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SIS Manual
DSS-5027
DSS-4263