

# **DSS ADMINISTRATIVE LETTER PERFORMANCE MANAGEMENT/REPORTING AND EVALUATION MANAGEMENT PM-REM-AL-0207**

**TO:** County Directors of Social Services

**ATTENTION:** DSS Child Welfare Services Program Administrators

DSS Child Welfare Services Supervisors

DSS Work First Program Administrators

DSS Work First Program Supervisors

DSS Adult/Family Services Program Administrators

DSS Adult/Family Services Program Supervisors

DSS Data Entry Supervisors and Operators

**SUBJECT:** Newly Created Menu Screen in the Services Information System (SIS)

**Newly created Menu Screen - 'Worker Identification System Main Menu'- Only Option 6 - '5027 Worker Name Update by SSN / ID' is functional at this time.**

**DATE:** April 19, 2007

## **I. GENERAL INFORMATION**

In order to comply with the requirements of the Identity Theft Protection Act ([S.L. 2005-414](#)) the Services Information System (SIS) has created a New Menu Screen called the 'Worker Identification System Main Menu' to facilitate efforts to edit the Case Manager Name in Field 15 of the DSS-5027. This new screen menu will include several functions, but for now, one function (Option 6) is only available.

Upon logging into the 'North Carolina Department of Health and Human Services Master Menu, Select Option 2. Press enter. On the blank screen key 'SY15'. Press enter. The 'Worker Identification System Main Menu' appears. In the Selection field, enter Option 6, '5027 WORKER NAME UPDATE BY SSN / ID, and a Case Manager's Social Security Number (or valid Alternative ID). A list of records (those with open services or those closed on or after October 1, 2006) for that Case Manager appears. Changes may be made to the Case Manager's Last Name, First Initial

and/or Middle Initial for a specific record (or records) on that screen without having to open each DSS-5027. This function may be used to insure consistent spelling of the Case Manager Name on every listed DSS-5027 belonging to that worker.

Please keep in mind when making edits to the Case Manager Name that it is imperative to insure that the Worker Last Name, First Initial and Middle Initial be exactly the same for every DSS-5027 for that worker or there will be multiple worker ID's created for that worker during the mass update that will occur on May 31, 2007.

## II. NEW SCREENS

The Services Information System (SIS) will now include a Newly created Menu Screen called the 'Worker Identification System Main Menu'. Although this menu will eventually include several Options (after the mass update), for now only Option – 6 – WORKER NAME UPDATE BY SSN / ID MENU' will be available to assist in the efforts of updating the Case Manager's Last Name, First Name and Middle Initial on DSS-5027s, in preparation for the mass update on the night of May 31, 2007. To access this Option, follow the instructions below:

A. From the North Carolina Department of Health and Human Services Master Menu:

Choose option 2 - Blank Screen (CICS) and press enter.

On the blank screen, key 'SY15' and press enter.

B. The following Menu in SIS will appear. Choose Option 6 and key the Worker SSN or valid Alternative ID and press Enter, as illustrated below.

```

          SYA000FM          WORKER IDENTIFICATION SYSTEM          04/02/2007
                                MAIN MENU                                14:08:42

          OPTIONS DESCRIPTION                                KEY
          -----
          1          WORKER ID INQUIRY                                WORKER
          ID NUMBER
          (LAST, FIRST, MI)          2          WORKER NAME INQUIRY                                NAME
          ID          3          WORKER ID ADD                                WORKER
          ID          4          WORKER ID UPDATE                                WORKER
          5          S I S SYSTEM MENU                                NONE
          6          5027 WORKER NAME UPDATE BY SSN/ID                                SOCIAL
          SECURITY NUMBER / ID

          OPTION 6 KEY 123456789

          PF4=EXIT
          SELECT OPTION
    
```

C. The following screen will appear. It displays the Worker Last Name, First Initial and Middle Initial for DSS-5027 data associated with that Worker SSN/ID. (Only data from DSS-5027s with open services or those closed on or after October 1, 2006 will display. It may require more than one page to display all the data for a single worker.) You may edit the Worker Last Name, First Initial and/or Middle Initial directly on this screen, which will update the DSS-5027 for the SIS Client ID shown on each line that is edited. It is not necessary to open each DSS-5027 to make these edits.

```

SYA050FM      WORKER IDENTIFICATION SYSTEM      4/02/2007
                5027 NAME UPDATE BY SSN          14:34:51

                WORKER SSN: 123456789

                WORKER
LAST   FIRST MID   SIS ID   CLOSE DATE
-----
MORRIS D T   2003xxxxxxx
MORRIS D T   2003xxxxxxx
MORRIS D   2005xxxxxxx
MILLER D T   2005xxxxxxx   2006-12-19
MORRIS D R   2005xxxxxxx
MILLER D T   2005xxxxxxx
MILLER D T   2005xxxxxxx   2007-01-02

PF3= WORKER MENU PF7= PREV PAGE PF8= NEXT PAGE
507 LAST PAGE DISPLAYED

```

In the above example, the operator would want to edit the names that were inconsistent with the most common, or desired version of the Worker Name. The Last Name, First Initial and Middle initial on all lines for the worker whose correct SSN/ID is displayed should be identical.

In the above example the Last Name and Middle Initials should be edited to be consistent for each name, assuming workers "Morris" and "Miller" are actually the same individual (perhaps a name change after January 2007). The edited screen would appear as follows:

WORKER SSN: 123456789

WORKER		MID	SIS ID	CLOSE DATE
LAST	FIRST			
MORRIS	D	T	2003xxxxxxxx	
MORRIS	D	T	2003xxxxxxxx	
MORRIS	D	T	2005xxxxxxxx	
MORRIS	D	T	2005xxxxxxxx	2006-12-19
MORRIS	D	T	2005xxxxxxxx	
MORRIS	D	T	2005xxxxxxxx	
MORRIS	D	T	2005xxxxxxxx	2007-01-02

PF3= WORKER MENU PF7= PREV PAGE PF8= NEXT PAGE  
507 LAST PAGE DISPLAYED

Middle Initial is not required, but it should either be consistently used on all records for an SSN/ID, or consistently not used for that SSN/ID. (If used, it should always be the same for a specific SSN/ID.)

If workers "Morris" and "Miller" were actually two different individuals, it would be necessary to determine which name was valid for the selected SSN/ID and edit only those names for consistency. You would want to note the SIS IDs for the records which had the wrong Worker SSN/ID and edit the Worker SSN/ID on each of the individual DSS-5027s at a later time, using the correct SSN/ID for the worker.

Note: After all edits or corrections have been made to the worker names and before you move to another page, you must press 'ENTER' to accept and update all changes on that page. If the update is successful you will receive the message:

"5027 WORKER NAME(S) UPDATED"

If you make any edits or corrections on a screen/page and then page forward or backward without depressing 'ENTER', none of the edits will be processed.

### III. REPORTS

To determine what Case Manager Names need to be edited, refer to NC XPTR report DHR SYA WORKER ID BY COUNTY REPPT (SYA940-1 WORKER REPORT). This report shows a list of valid Worker SSN/IDs and the Case Manager Name associated with those IDs. For those SSNs/IDs that are associated with more than one Case Manager Name, the SSN/ID will be listed once with one name and followed by the other names associated with that ID. Counties should work this report until each

SSN/ID is associated with only one name, and appears on the list with only one name.

Update of Case Manager Names for consistency is the second of three actions necessary before the mass update to assign unique Worker IDs in SIS and Central Registry can take place on May 31, 2007. Another Administrative Letter will be issued at a later time to describe the last necessary action. **Please make every effort to complete this action**, and if you have not done so already, the first action (correction of invalid Worker SSNs/IDs in SIS and Central Registry) described in [PM-REM-AL-01-07](#) (March 15, 2007), **by May 11, 2007. Failure to successfully complete these actions will result in multiple Worker IDs being assigned to some Case Managers during the mass update.**

If you have any questions, please contact the Information Systems Support staff of the Performance Management/ Reporting and Evaluation Management Section at (919) 733-8938.

Sincerely,

A handwritten signature in cursive script that reads "Hank Bowers".

Hank Bowers, Chief

Performance Management/Reporting & Evaluation Management Section

HB/mb