

# SERVICES INFORMATION SYSTEM (SIS) USERS MANUAL - UPDATE

CHANGE NO. 02-14

DATE: June 24, 2014

TO: Adult Services and Child Welfare Services Staff

EFFECTIVE: July 1, 2014

The Services Information System User's Manual has been revised to incorporate the following changes.

**Four new Service Codes (see below) and a new Program Code (MAC – Medicaid Administrative Claiming) have been established.** Title XIX of the Social Security Act authorizes federal reimbursement to states for quarterly expenditures for medical assistance under the approved Medicaid state plan, and for expenditures necessary for administration of the state plan. These new Service Codes and Program Code will be used to document worker time for when performing eligible activities including Medicaid outreach; Medicaid eligibility determinations; referral to Medicaid services; case planning, review, and management; development of an individual plan of care for Medicaid Services; and coordinating transportation needed to access Medicaid services. The new Service Codes are:

**340 – Referral, Coordination and Monitoring of Medical Services**

Use on the DSS-5027, DSS-4263 (Client ID required) and the DSS-1571 Part IV (Client ID required)

**341 – Facilitating an Application for the Medicaid Program**

Use on the DSS-4263 (No Client ID required) and the DSS-1571 Part II (No Client ID required)

**342 – Outreach for Medicaid Services**

Use on the DSS-4263 (No Client ID required)

**343 – Arranging Transportation Services for Client to Access Medicaid Services**

Use on the DSS-5027, DSS-4263 (Client ID required) and the DSS-1571 Part IV (Client ID required)

**Service Codes 392 – At Risk Case Management Services - Child Welfare, 395 - At Risk Case Management Services and Program Codes 2 – Medicaid Case Management and HC2 - Health Choice Case Management are being discontinued.** With the implementation of Medicaid Administrative Claiming, At-Risk Case Management Services are being discontinued in North Carolina.

**Program Code T - Title XIX Medical Transportation has been deleted from Service Codes 380 Case Management and 381 - Services Intake.** This fund source is no longer valid with these services due to implementation of Medicaid Administrative Claiming.

Other Changes

**The definitions for Service Codes 250 - Transportation Services, 251 - Transportation Services - Child Foster Care, and 252 - Transportation Services – CPS found in Appendix B have been edited to emphasize that arranging for and helping clients utilize transportation is not included in the definition of these services.**

**The definitions for Service Codes 380 Case Management and 381 - Services Intake have been edited to remove references to providing case management activities or intake services (respectively) for Medicaid Transportation.**

Policy regarding exceptions to:

- 1) the requirement of a client signature on the DSS-5027 for individuals for whom only referral, coordination or monitoring of Medical services (Service Code 340 – Referral, Coordination and Monitoring of Medical Services) and/or arranging for transportation for to access Medicaid services (Service Code 343 – Arranging Transportation Services for Client to Access Medicaid Services) are being provided; and
- 2) the requirement for a DSS-5027 when only application for Medicaid is being facilitated (Service Code 341 - Facilitating an Application for the Medicaid Program) and/or Medicaid outreach activities (Service Code 342 - Outreach for Medicaid Services) are being provided

have been added to Section DSS-5027 of the SIS User’s Manual.

**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 919-733-4530.

## 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. 02-14

**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 the replicas of the forms and save to disk.

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

5. Click on the “CN – 02-14” and “CN – 02-14 ATTACHMENTS” links at the bottom of the page to download the Change Notice and the attachment documents, and

6. Click on the "[DSS-5027](#)" and "[DSS-4263](#)" links to download the replicas of the forms.
7. 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:**

8. Click on the "[SIS Manual](#)" link at the bottom of the page to download the revised manual, and
9. Click on the "[DSS-5027](#)" and "[DSS-4263](#)" links to download replicas of the forms.
10. 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**

**Table of Contents** dated 06-01-2014

**Instructions for the SIS Client Entry Form, DSS-5027**

page 2, dated 03-01-2010  
page 3, dated 10-01-2009

**Instructions for Worker Daily Report of Services (DSS-4263)**

page 8, dated 06-01-2014

**Appendix B**

page B-6, dated 06-01-2014  
page B-30, dated 07-01-2013  
pages B-34 through B-58 (various dates)

**Appendix C**

pages C-1 – C-2, dated 06-01-2012  
page C-4, dated 09-01-2012

**INSERT**

**Table of Contents** dated 07-01-2014

**Instructions for the SIS Client Entry Form, DSS-5027**

page 2, dated 07-01-2014  
page 3, dated 07-01-2014

**Instructions for Worker Daily Report of Services (DSS-4263)**

page 8, dated 07-01-2014

**Appendix B**

page B-6, dated 07-01-2014  
page B-30, dated 07-01-2014  
pages B-34 – B-59, dated 07-01-2014

**Appendix C**

pages C-1 – C-2, dated 07-01-2014  
page C-4, dated 07-01-2014




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Performance Management/Reporting and  
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