Social Security Report Guide

Social Security Report File (for ssa.gov)

Contents

Overview

This guide explains how to configure and print the Social Security report. This guide does not explain loading the file to SSA website, but simply creating the file in iSOMS.

> ⚠ **IMPORTANT**: The setup to create the Booking Social Security file will require a Super User to set up some information. Make sure a Super User is performing the following actions.

You will need to know two pieces of information to setup this report:

1. The **Facility ID** of your agency

2. The **Reporting ID** of your agency.

Both of these are provided to you by SSA. Generally, they will be in the following formats:

Facility ID: State + 4 digit number (**Example**: TN1234)

Reporter ID: 4 digit number. Example: 5678

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Setup

To perform the proper setup, begin on the iSOMS home screen.

Choose **Admin → Agency → Company Setup**
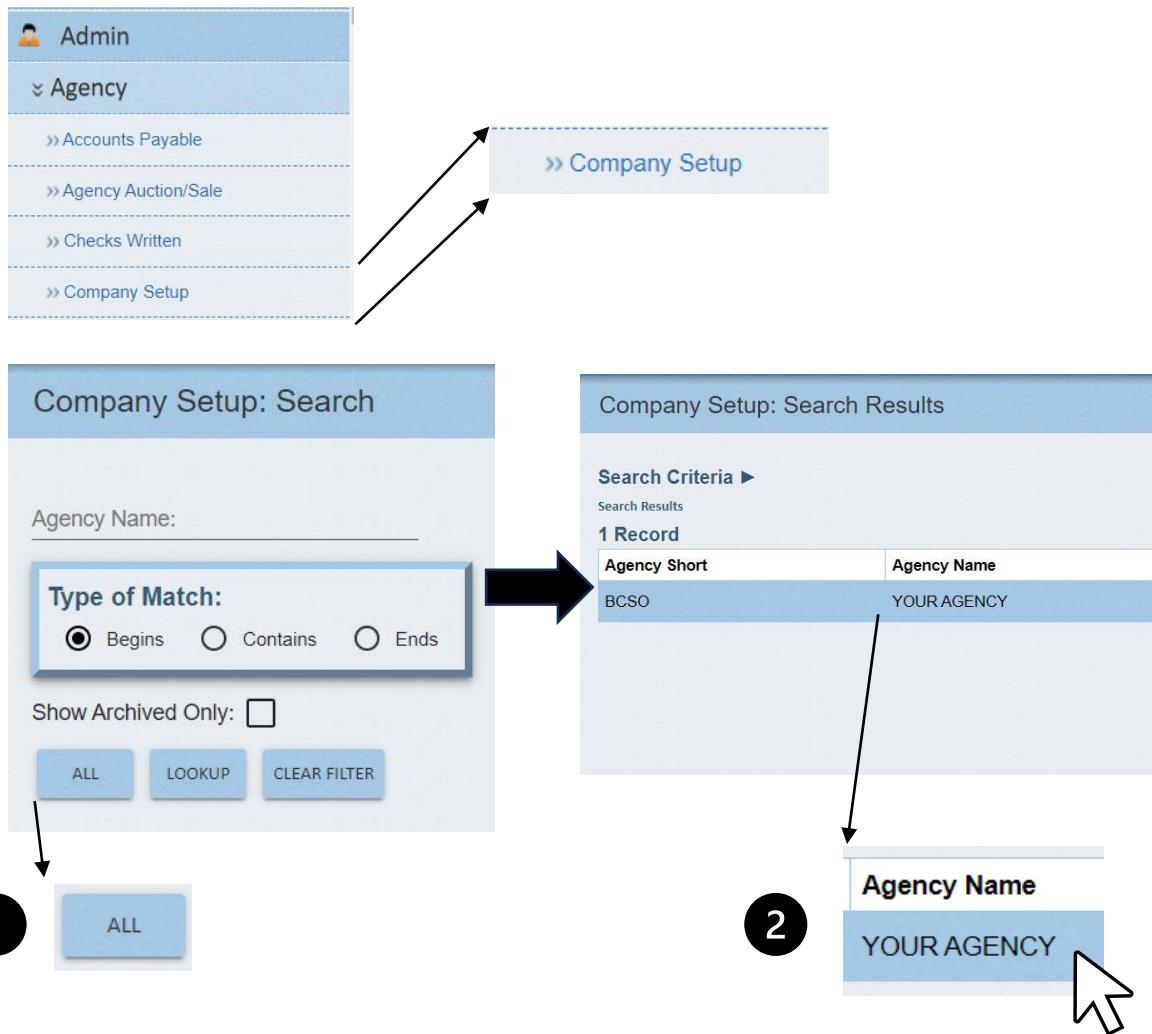
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Find the **SSA Facility ID** and **SSA Reporter ID** fields. Enter the data.

Click **Save** near the top of the screen.

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Printing the Report

This section explains how to print the audit report or create the file to be uploaded to the Social Security Administration's (ssa.gov) website.

Navigate to:

Corrections   →   Booking   →   Jail Reporting

Near the far right, click on the **Monthly Reports** tab button.

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Look towards the bottom right for the **Social Security Export/Report** button.

This will bring up the screen to export the Social Security report.

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Report

The Report Style box determines whether you would like to:

1. See the list of who was evaluated.

Report Style
Social Security List

OR

2. Export the file so you can upload it to the SSA website.

Report Style
Social Security Export File
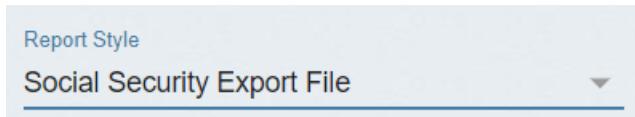
The default **Report Style** is Social Security List, an audit of who was evaluated.

Enter your date range for the submission month and click **View**.

VIEW   DOWNLOAD   EMAIL   CLEAR FILTER

Your Agency X
Social Security Export List
Dates From 05/01/2024 Through 05/31/2024
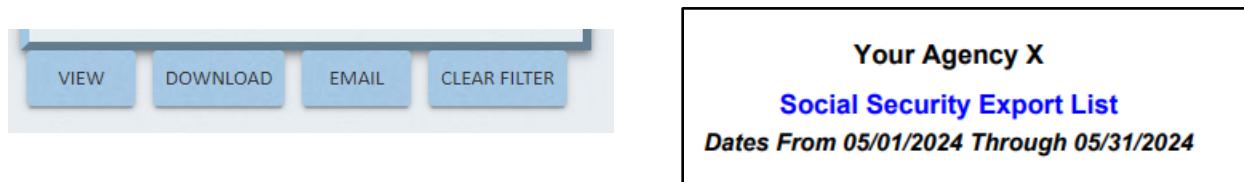
Export File

To create the export file for SSA.gov, select Social Security Export File from the Report Style list.

Then click **View** to download the file to the computer.

File name: PTN.05312024.PRS.R1234
Save as type: R1234 File (*.R1234)
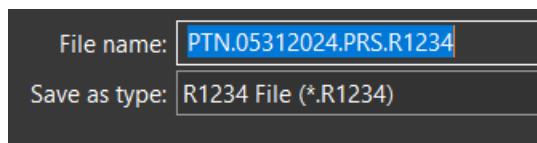
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For More Information...

We hope this manual has been helpful to you and your agency. If you have any more questions, don't hesitate to call. Call us at 888-644-5786 to ask questions and get clarification.

First Revision, May 2024