



Social Security Report Guide

Social Security Report File (for ssa.gov)

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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

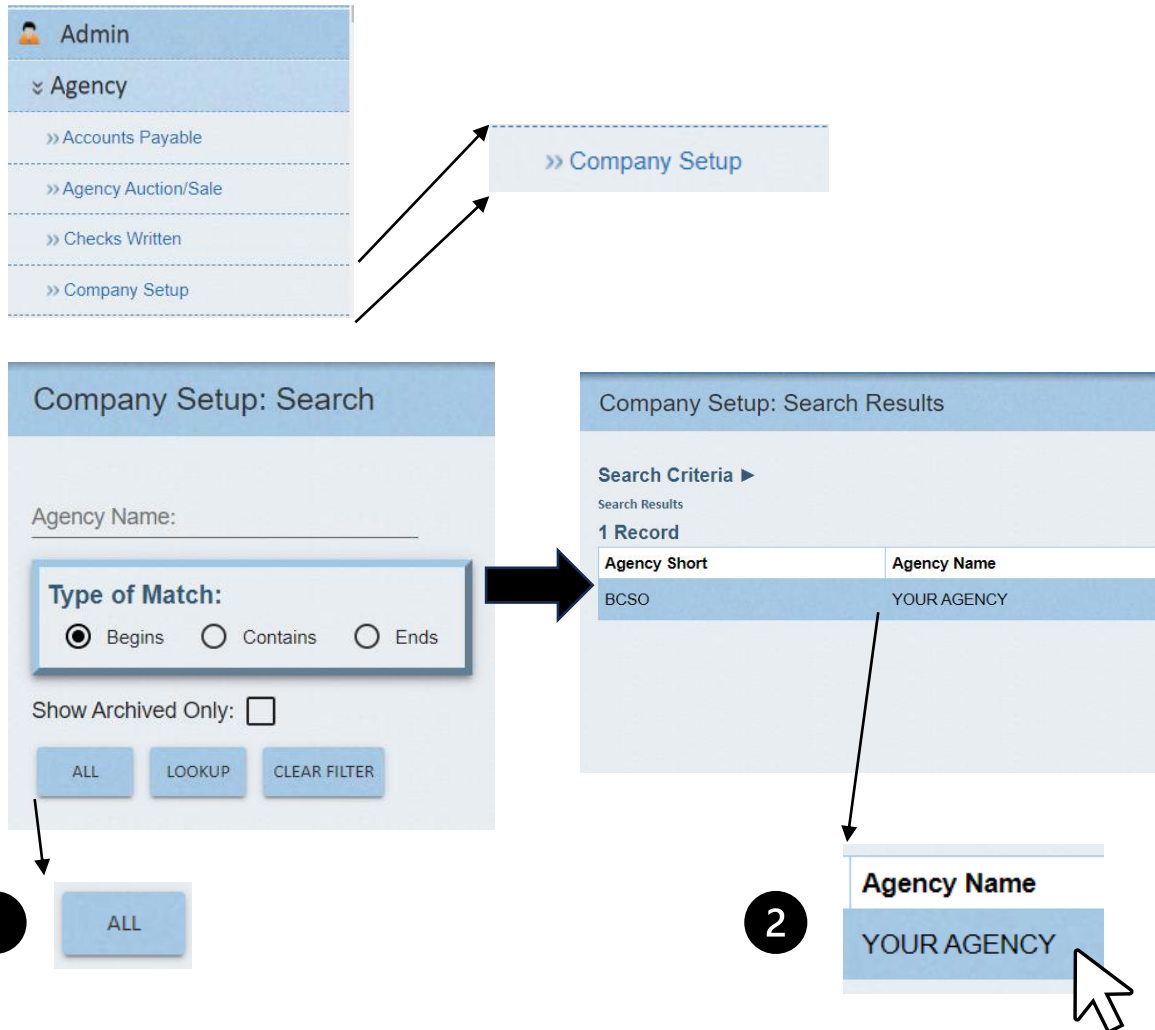


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Setup

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.

Company Setup: View Record

LOOKUP AUDITS BACK TO SEARCH RESULTS TOPICS ADD REPORTS MAINTAIN FILE

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

Agency Name: YOUR AGENCY Agency Short: BCSO Agency #: 3 OR#: TN0000000 Contributor ☐ Block Login ☐

House #: 1905 Street: HIGH PARK CIR Apt/Lot #: City: MARYVILLE State: TN ZipCode: 37803 County: BLOUNT

Address 2: Phone #: (865)-380-4600 Fax #: Email: MYAGENCYEMAIL@EMAIL.COM Website: WWW.MYAGENCY.ORG

Department: BLOUNT COUNTY SHERIFF'S OFFICE SSA Facility ID: TN9876 SSA Reporter ID: 1234 IBRS/IPS County Id:

Clock Card Start Date: 0 Pay Period Days(14,28,30)

NCIC Devices Product Keys Setup Addresses Logos Signatures Sounds Application Access Settings Email Events System Note Draft Hist... Case Numbers Interfaces Notes Reports Internet Accounts Images Attachments State IBR Settings Email / Cad Protocol Module Record Events Agency User Forms Employee Notificatio... Drug Tests Employee Drug Tests Booking Evidence Audits Site Names/URL

SSA Facility ID: TN9876 SSA Reporter ID: 1234

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

SAVE DELETE



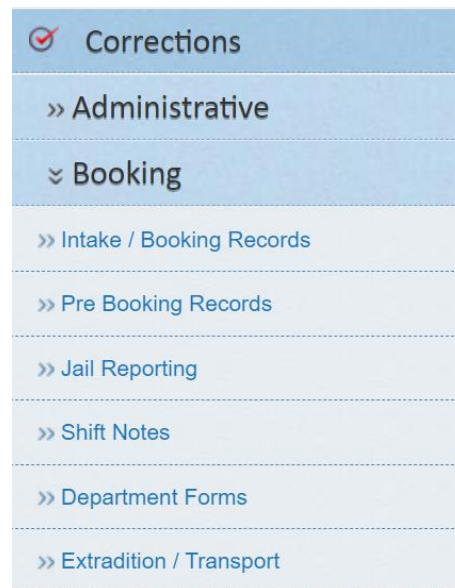
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Printing the Report

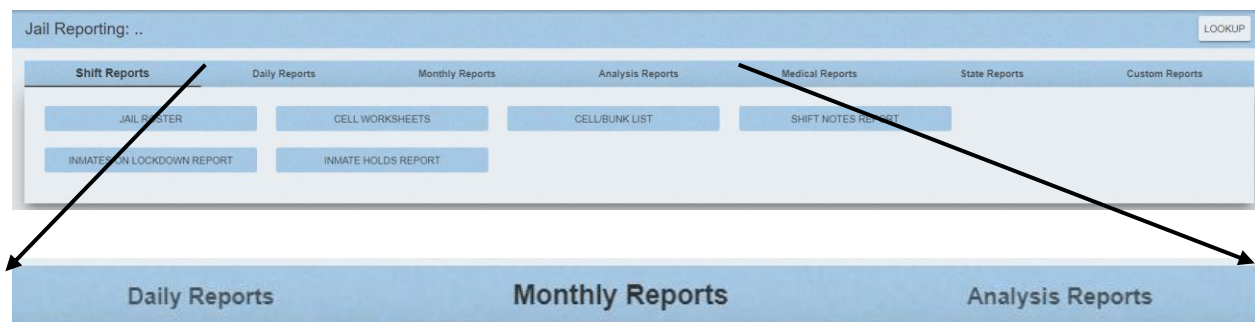
This section explains how to print the audit report or create the file to be uploaded to the Social Security Administration's (ssa.gov) website.

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.

Shift Reports	Daily Reports	Monthly Reports	Analysis Reports	Medical Reports	State Reports
AGE LISTING	AGENCY INTAKE LIST	BONDSMAN REPORT (RELEASE TAB)	BONDSMAN REPORT (CHARGES)		
BONDS POSTED REPORT	COURT DOCKET LIST	LAW ENFORCEMENT FACILITY LOG	DEPARTMENT BOARD BILLS		
DNA SAMPLE REQUIRED LIST	INCOMPATIBLES LIST	FLATTENED SENTENCE REPORT	INMATE COURT CHARGE DISPOSITION		
INMATE MAIL LOG	DEPARTMENT MEAL LOGS	INMATE VISITATION REPORT	INTAKE/RELEASE REPORT		
JAIL INCIDENTS REPORT	JAIL INMATE NOTES REPORT	FOREIGN BORN LIST			
GRIEVANCE REPORT	INMATE EDUCATION REPORT	SOCIAL SECURITY EXPORT/REPORT	BOOKING WARRANT/CIVIL LIST REPORT		
PROGRAM/BEHAVIOR CREDIT LIST REPORT					

SOCIAL SECURITY EXPORT/REPORT

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

Jail Reporting: Social Security Export Report

Report Style:
Social Security List

Intakes From: 05/31/2024 Intakes Through: 05/31/2024

Inmate Sex:
Building:

☐ Exclude Temp Release

Report Format:

☒ PDF ☐ Excel ☐ XML ☐ SQL

VIEW DOWNLOAD EMAIL CLEAR FILTER



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Report

The Report Style box determines whether you would like to:

1. See the list of who was evaluated.

A screenshot of a web interface showing a dropdown menu labeled "Report Style". The menu is open, and the selected option is "Social Security List". The dropdown is light blue with a dark blue border.

OR

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

A screenshot of a web interface showing a dropdown menu labeled "Report Style". The menu is open, and the selected option is "Social Security Export File". The dropdown is light blue with a dark blue border.

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**.

A row of four light blue buttons with dark blue text. From left to right, the buttons are labeled "VIEW", "DOWNLOAD", "EMAIL", and "CLEAR FILTER".A white rectangular box with a black border. Inside, the text reads: "Your Agency X" in bold black font, "Social Security Export List" in bold blue font, and "Dates From 05/01/2024 Through 05/31/2024" in bold black font.

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.

A dark gray form with two input fields. The first field is labeled "File name:" and contains the text "PTN.05312024.PRS.R1234". The second field is labeled "Save as type:" and contains the text "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.

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