



# 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

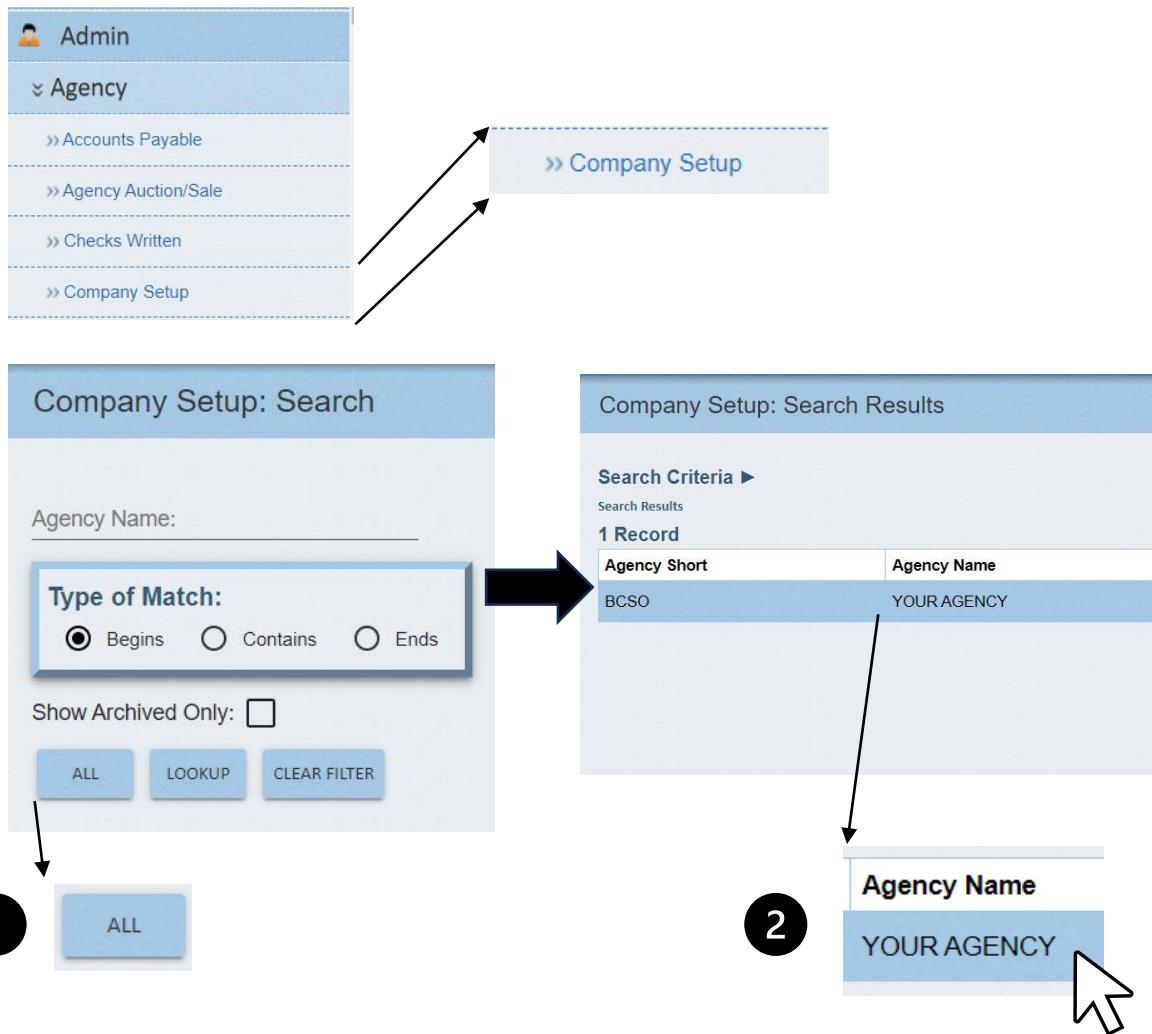


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## Setup

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 »

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

House #: 1905 Street: HIGH PARK CIR Apt/Lot #:

Address 2:  City: MARYVILLE State: TN ZipCode: 37803 County: BLOUNT

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

Department: BLOUNT COUNTY SHERIFF'S OFFICE SSA Facility ID: TN9876 SSA Reporter ID: 1234  IBRSN/FC 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 C... Agency User Forms Employee Notificat...  
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**

The image shows the iSOMS software interface. On the left is a vertical navigation menu with icons and text: Global Records Search, System, Records, Corrections (which is checked), Administrative, Booking, and Commissary. To the right is a detailed sidebar with a blue header containing a checked 'Corrections' checkbox and a 'Booking' dropdown menu. The 'Booking' menu includes sub-options: Intake / Booking Records, Pre Booking Records, Jail Reporting (which is checked), Shift Notes, Department Forms, and Extradition / Transport.

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

The image shows the 'Jail Reporting' sub-module. At the top, there are tabs for Shift Reports, Daily Reports, Monthly Reports (which is highlighted in blue), Analysis Reports, Medical Reports, State Reports, and Custom Reports. Below these tabs are several report buttons: JAIL ROSTER, CELL WORKSHEETS, CELL/BUNK LIST, SHIFT NOTES REPORT, INMATES ON LOCKDOWN REPORT, and INMATE HOLDS REPORT. At the bottom, there is a navigation bar with tabs for Daily Reports, Monthly Reports (which is highlighted in blue), and Analysis Reports.



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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					

A large black arrow points from the bottom right corner of the "SOCIAL SECURITY EXPORT/REPORT" button in the grid to a larger, separate button labeled "SOCIAL SECURITY EXPORT/REPORT" below it.

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

**Buttons:** VIEW   DOWNLOAD   EMAIL   CLEAR FILTER



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### Report

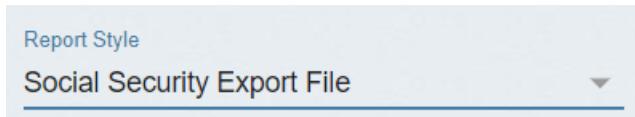
The Report Style box determines whether you would like to:

1. See the list of who was evaluated.



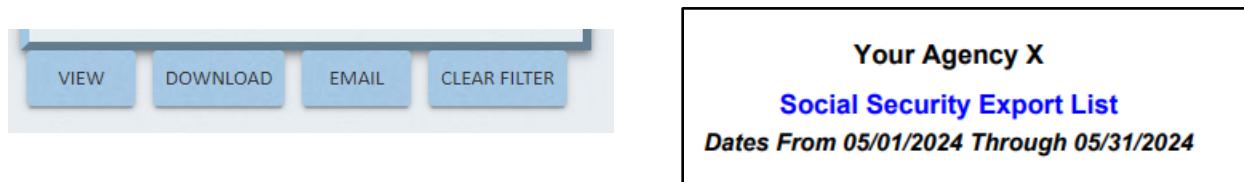
OR

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



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

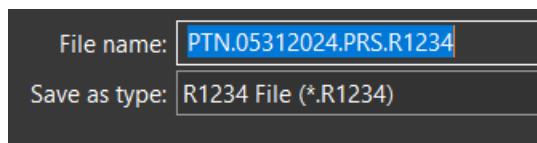
Enter your date range for the submission month and click **View**.



### 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.





## Social Security Report Guide

### 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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