



3.0 PROGRAM DATA MANAGER ORIENTATION AFTERSCHOOL & SUMMER CAMP



KIDS HOPE ALLIANCE
The Jacksonville Partnership
for Children, Youth & Families

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DRAFT

Greetings

1. Welcome to SAMIS 3.0, this is the landing page.
 - Programmatic data can be entered and viewed via the “Delivery” tab



Find a Program

1. Click on  DELIVERY > Programs > Click  to view Program Page

Closed Dates

The purpose of this mandatory procedure is to close nonservice dates.

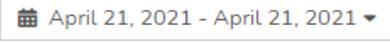
1. Click on “Program Details” > Under the “Attendance UOS” > Select “Closed Dates” > Under “Manage Closed Dates” Select the “Action” > Select the “Dates” > Click Process”

Note: There are multiple ways to close a date range from the action dropdown list.

Add New Participant

1. Scroll to the bottom of your program page until you get to the “participant(s) section.
2. Ensure the participants name is not already in the program by entering the participants name in the “Keyword Search”.
3. If the participant is not in the program, add a new participant. See #4 & 5 of this section
4. If the participant’s name is in the program, modify the participant. See page 3 “Modify a Participant’s Demographic Page”.
5. Click on  above the “Keyword Search” area.
6. Complete the demographic page information and click Save
 - a. You must enter the last 4 for all participants enrolled in SAMIS.
 - b. You must enter the student ID (SID) for all participants enrolled in SAMIS.

Record Units of Service – Daily

1. Click on “Program Details” Select” Attendance UOS: Record Individual Attendance/ Units of Service”
2. Click on “Select Site” and select “All Participants”
3. Click on “Select Service” and select the service you are recording units of service for
4. To assign the same date click” Custom” double click the date you want to record units of service for and click apply on the bottom right-hand corner of the calendar
5. This is an example of what selecting the same date will look like 
6. Enter the max number of units for your day or session in the first date cell of row 1, and then press your tab key.
7. Click the cell you just tabbed out of (#6 above). It should have a small black box at the lower right corner. 
8. With your mouse, hover over the small black box in the corner of the cell, hold your left mouse key and drag the cell value down the column for all cells.
9. Review the SAMIS sign-in sheet for the date being recorded and reduce the value for any student who had less than the max number of units or was absent. **Note, the # of UOS recorded in SAMIS for each student**

Find a Participant’s Demographic Page

1. Go to the program page
2. Scroll to the bottom of the page and choose the “Participant(s) section
3. Click “View” next to the student’s name to open the demographic page.

Modify a Participant’s Demographic Page

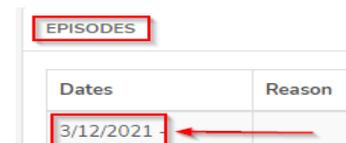
1. Go to the participant’s demographic page.
2. To modify most demographic fields for a participant, you can click the **Modify** button at the top left of the page



- a. Make all necessary changes to editable fields on the page.
- b. Click **Save**.
- c. Return to the Program Page by clicking the Programs Recent on the top of the demographic page.

Close a Participant’s Record

1. Go to the participant’s demographic page.
2. Click the **date** in the **EPISODES** box near the top right of the page.



3. Enter a **Close Date** and **Closing Reason** and Click Save.

Re-Open a closed Participant Record

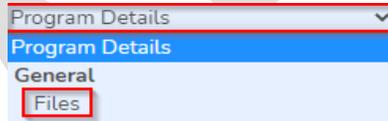
1. Go to the participant's demographic page.
2. Click the **New Episode** button near the top of the page.
3. Add an **Open Date** leaving the other fields blank.
4. ***Result should show a previous open/close episode and a new open date.***



EPISODES	
Dates	Reason
3/12/2021 -	
8/1/2020 - 3/10/2021	Successfully completed program

Upload Documents

1. To upload your document(s), go to the Program Page and Click 'Program Details' Select "Files"



2. Click on "Upload Files" next to Program Details
3. Click on "Choose File"
4. Select the file from your computer that you want to upload. Please make sure you have named your file/s appropriately
5. Click "Upload Files"
6. To view the document, you uploaded click "Program Details"
7. Select "Files". Here you will see the documents you uploaded

Input Rules Afterschool Programs Only

Attendance	UOS: Input
< 90 minutes or absent	0.00
> = 90 Minutes 1.5 hours	1.00

Input Rules Summer Camps Only

Attendance	UOS: Input
< 3 Hours	0.00
>= 3 Hours and < 6 Hours	0.50
>= 6 Hours	1.00

Reset Password

1. Use the link under the green **Sign In** button, on the login page, to request a temp password to be emailed to the address we have on file.

