

# SAMIS

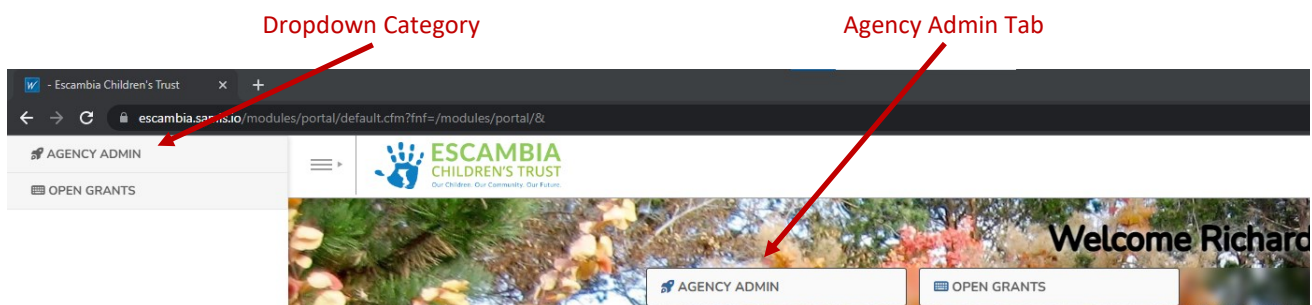
## New Agency Admin Guide



**ESCAMBIA**  
**CHILDREN'S TRUST**  
Our Children. Our Community. Our Future.

### SAMIS Navigation

1. The SAMIS homepage can be found using the following link:  
**<https://escambia.samis.io/>**
2. You will then be asked to enter your email address (user name) and SAMIS password.
3. Go to the "Agency Admin" section by either clicking on the dropdown category and selecting "Agency Admin" or selecting the "Agency Admin" tab.



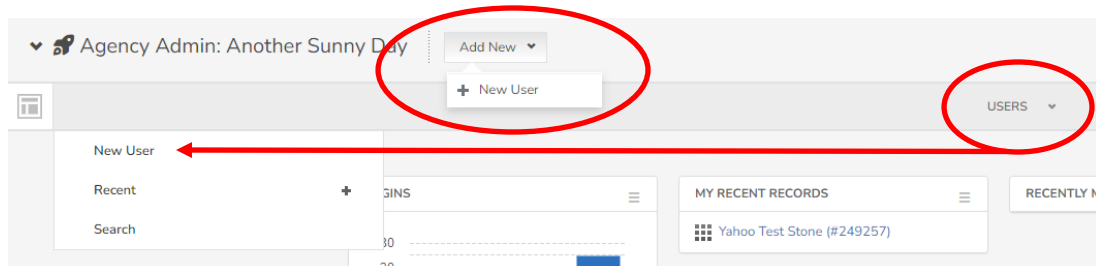
### SAMIS Agency Admin

Congrats on being selecting to serve as the agency administrator. As the agency administrator you determine who in your program has access to SAMIS. You have the option of assigning your program's staff to 2 different groups in SAMIS.

- Provider: Financial - Staff member(s) who handle the financial reporting to Escambia Children's Trust (ECT).
- Provider: Program—Staff member(s) who work with the program participants. In this section staff will be able to enter the participant's ECT Contract Exhibit C information into SAMIS. In this group, staff will also be able to take attendance and enter program information in SAMIS.

### Add Staff Member into SAMIS

1. In the "Agency Admin" section either click on the "Add New" or hover mouse over the down arrow next to users and select "New User"

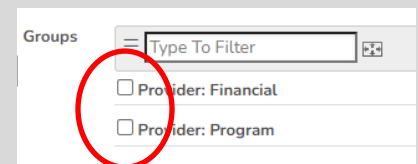
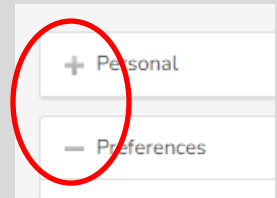


## Add Staff Member into SAMIS (cont.)

2. Enter the staff member's email address.
3. You will then be taken to a screen where you can enter the new user's information.
4. Most of the categories in this section are optional. Your organization can decide how much information to enter for each staff member. As long as you are funded by ECT the Agency Admin has access to user information, so it can serve as a great resource for your organization. Also the new user will have the option to update their profile information once they have logged into SAMIS.

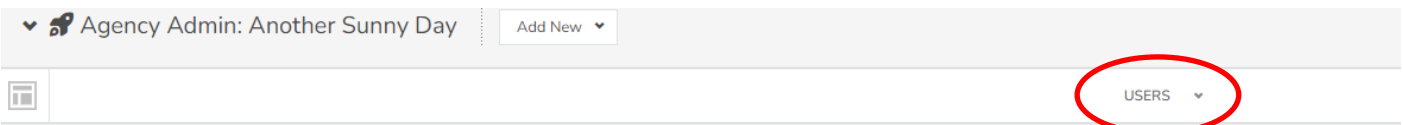
### Helpful Hints

- The positive and negative signs at the beginning of each section expand or collapse section.
- Check the box next to the "Reset Password" in the "Personal" section. The newly added staff member will need to enter a new password before entering SAMIS for the first time.
- In the "Groups" section, select the correct group for the newly added staff member. By checking both boxes the user will have access to both groups.
- New users will receive a SAMIS invitation email. The email provides login instructions along with a username and password. The SAMIS New User Guide found on the ECT's website provides additional login instruction.



## Edit Staff Member in SAMIS

1. In the "Agency Admin" section click on the "Users" tab.

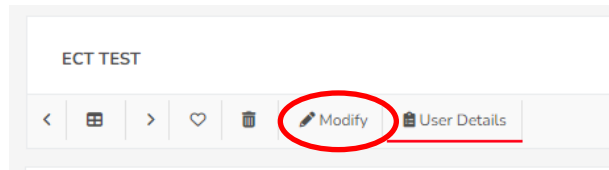


2. The next screen will display all the users in your program. Click on the view button next to the users name you want to edit.

	<input type="checkbox"/>	Active...	Is Use...	First Name	Last Name	Logins	Last Login
1	<input type="checkbox"/> View	No	Yes	Test	Tester	13	2/22/2023
2	<input type="checkbox"/> View	Yes	Yes	ECT	Test	6	3/1/2023
3	<input type="checkbox"/> View	Yes	Yes	Richard	test	32	4/11/2023
4	<input type="checkbox"/> View	Yes	Yes	Rich	Testing Stone	14	4/11/2023
5	<input type="checkbox"/> View	Yes	Yes	Yahoo	Test Stone	3	4/12/2023

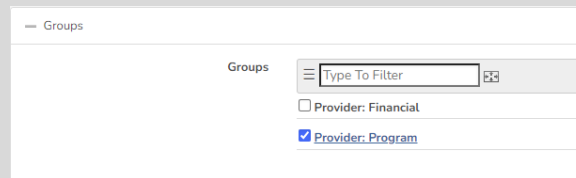
### **Edit Staff Member in SAMIS (cont.)**

3. Click on the “Modify” button to edit the staff members information.

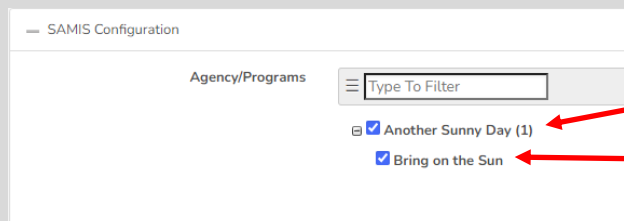


### **Things You May Need to Modify**

- Is the user still active in your program? If they have left your organization you can change their status to inactive. This option is found in the “Personal” section under “Active”.
- Did they change their last name or get a promotion requiring a title change? These options are found in the “Personal” section.
- Did the user forget their password? This option is found in the “Personal” section under “New Password”.
- Along with their promotion do they need additional access to the “Provider: Financial” or “Provider: Program” groups? Check or uncheck the boxes in the “Groups” section to change access.



- Did you agency receive funding for another program and the user needs to be added to that program? Check or uncheck the boxes in the “SAMIS Configuration” section to change access.



In the example above “Another Sunny Day” is the name of the agency (organization that applied for the grant). “Bring on the Sun” is the name of the agency’s program that that receives funding from ECT. In this example, only one program that has been funded, but over time the organization can have multiple programs funded by ECT.

Having the box next to agency checked means the user will have access to all of the agency’s funded programs. If the Admin only wants the user to have access to a specific program, they will uncheck the box next to the agency (Another Sunny Day) and check the box(es) next to the programs the user needs access.