

SAMIS

Provider: Program Group



Entering Participants in SAMIS

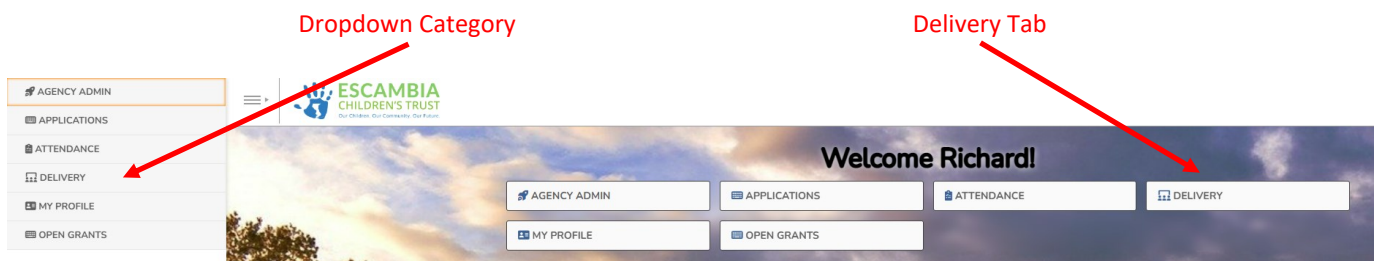
Before you begin entering participant information there are 2 categories in the SAMIS database that need to be defined.

- Cases - household group consisting of individuals who live together with or without the benefit of a dwelling.
- Participants - members of the household group who participate in the program.
- Example: The Smith household consist of 2 adults and 3 children (Smith Household = Cases). Two of the children in the Smith household, John and Katie, participate in an after school program (John Smith and Katie Smith = Participants).

When entering participant information you will need to enter the “Cases” information first and then enter the “Participants” information. The “Participants” section will have an area where you can link the 2 together.

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 “Delivery” section by either clicking on the dropdown category and selecting “Delivery ” or selecting the “Delivery” tab.



Add Case in SAMIS

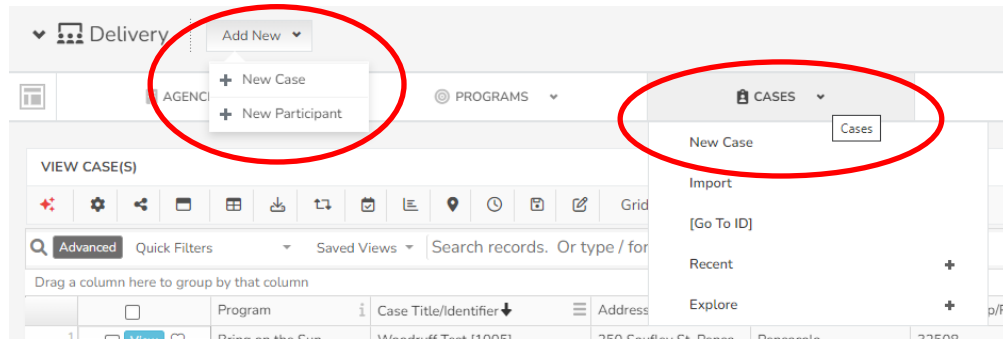
1. Before entering a new case, click on the “Cases” tab on the SAMIS toolbar. This will take the user to a page listing all the cases attached to your agency. Check to make sure the case you are about to enter is not already in the system.

Helpful Hint

The information on this page can modified, filtered, and sorted by the user. Please refer to the “SAMIS Grid Instructions” on the Escambia Children’s Trust (ECT) website under the SAMIS Tab.

Add Case in SAMIS (cont.)

2. In the “Delivery” section either click on the down arrow next to “Add New” or hover mouse over the down arrow next to “Cases” and select “New Case”.



3. Select the program and enter the case’s information.
4. In the “Program Case” section, the “Agency Case Code” field is used to link the participants to a case. This field definition should be universal across the agency and unique to prevent duplication. Thinking about the example on page 1, if you used case’s last name of Smith as the “Identifier” there may be confusion in the data entry. Smith is a very common last name, so your program may have 5 different Smith households. This will make it difficult to match the participant to their correct household. Looking at the fields in this section, the “Identifier” can be a combination of household contact Last Name + household contact First Name + email username (Smith, Jane, BestMama).
5. The “Case Title/Identifier” field is autogenerated and will be used to link the participant to their case. This field is a combination of the automatically assigned unique ID and the “Agency Case Code” field.
6. Continue filling out the rest of the fields and click “Save” when you have finished this section. It is now time to enter the program participants attached to the case.

Add Participant in SAMIS

1. In the “Delivery” section either click on the down arrow next to “Add New” or hover mouse over the down arrow next to “Participants” and select “New Participant”. This is similar to step 2 in the **Add Case in SAMIS** instructions.
2. In the “Participant” section, the “Case” field is where you link the participant to the case. When you click on the

Dropdown Category
Search Bar



Participant

Program * Another Sunny Day: Bring on the Sun View Program

Case * Select Case New Case

Agency Participant Code

Program Participant Information

[1007]

Andrews Test [1003]

McDonald Test [1002]

ShirleyTest [1006]

SmithTest [1001]

Woodruff Test [1005]

Add Participant in SAMIS (cont.)

3. In the “Participant” section, the “Agency Participant Code” is not a required field. If your current in-house system has a unique identifier for the participant, you can enter that in this field.
4. In the “Participant Contact Information” section, the “Participant Email Address” and “Participant Phone Number” are not required fields. These fields are for your records.
5. The “Site” field located in the “Program Information” section is used to link the participant to the site where they are receiving a service.
6. The “Groups” field in the same section is used to link the participant to the correct attendance group.
7. The “Activity Service” field determines the what the program is continuously monitoring.

Helpful Hint

More information related to adding sites your program and creating groups can be found in the “Provider: Program Group - Adding Sites and Creating Groups” instructions on the ECT website under the SAMIS tab.

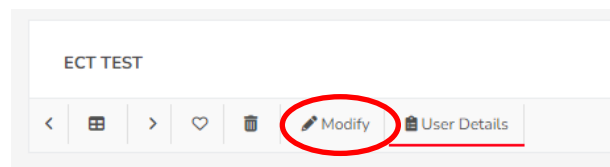
7. After all the information has been entered and saved the participant is now enrolled in your program.

Edit Case or Participant in SAMIS

1. In the “Delivery” section click on the “Cases” or “Participants” tab.
2. The next screen will display all the cases or participants in your program. Click on the view button next to the case or participant you want to edit.

		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

3. Click on the “Modify” button to begin editing information.



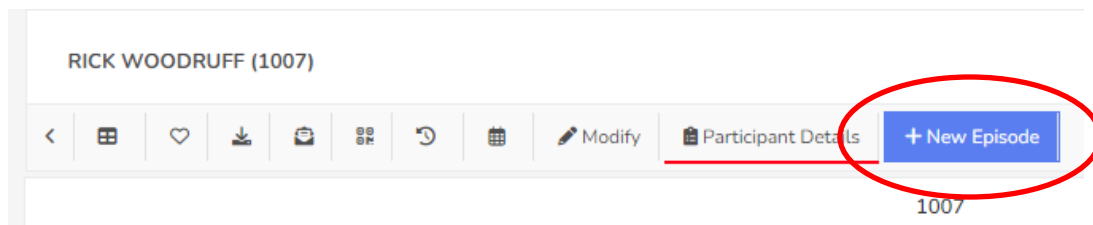
4. When you have finished modifying the record don't forget to hit save..

We are not done yet. Do not forget about creating a participant episode on the next page

Create a Participant Episode in SAMIS

The participant episode is used to establish a timeline for the participant. The following are some episode examples.

- Participant completed your summer program and is going to start in your afterschool program. The initial episode will end after the completion of the summer program and a new episode will be created for the afterschool program.
 - Participant was enrolled in your program and then stopped attending. The episode will need to be closed out because the participant is no longer attending
 - Participant who stopped attending, in the example above, begged to come back to your program. If they are let back into the program, a new episode will need to be created.
1. Follow steps 1 and 2 in the **Edit Case or Participant in SAMIS** instructions found on the previous page.
 2. On the same line as the “Modify” button, click on the “+New Episode”

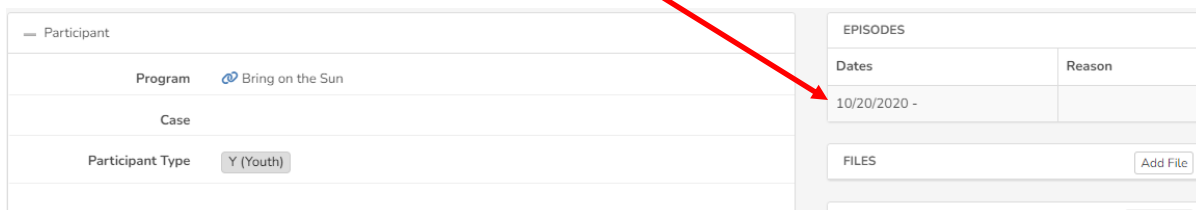


3. Complete the “Open Date” and “Referred From” fields. If your answer for “Referred From” is other please provide more detail in the “Other Referred From” field.
4. Click “Save” when complete.

Close or Edit a Participant Episode in SAMIS

1. To close or edit an episode, follow steps 1 and 2 in the **Edit Case or Participant in SAMIS** instructions found on the previous page.
2. Click on the episode that needs to be closed or edited.

Click here to close or edit an episode



3. If you are closing the episode, be sure to enter the “Close Date” and select the “Closing Reason”.
4. Click “Save” when complete.