

# SAMIS

Provider: Program Group



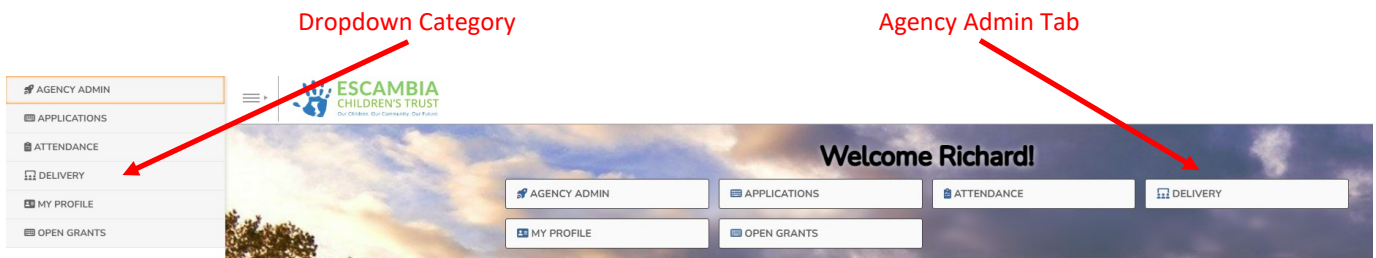
## Adding Sites and Creating Groups

Adding sites and creating groups should be done before entering new participants and starting attendance.

- Sites are locations where your services are taking place. For example, if you are doing an afterschool program at Pensacola HS, your site location is Pensacola HS.
- Groups are how you are dividing your participants for attendance. If your grant funds programs over multiple years, it is important to add group type and year to the group name. Some examples may be Summer Program 2023 Mrs. Smiths Class or Afterschool Program 2022/23 Blue Team.

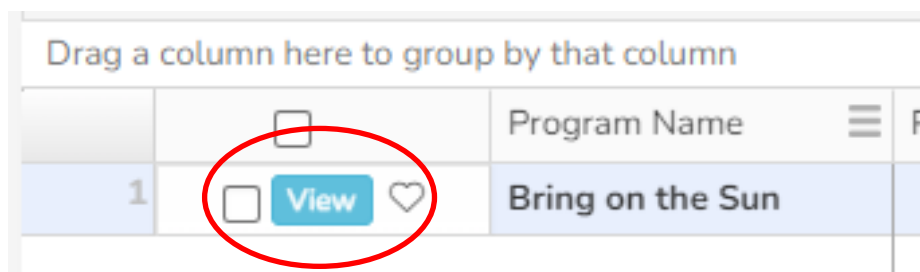
### SAMIS Navigation

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.



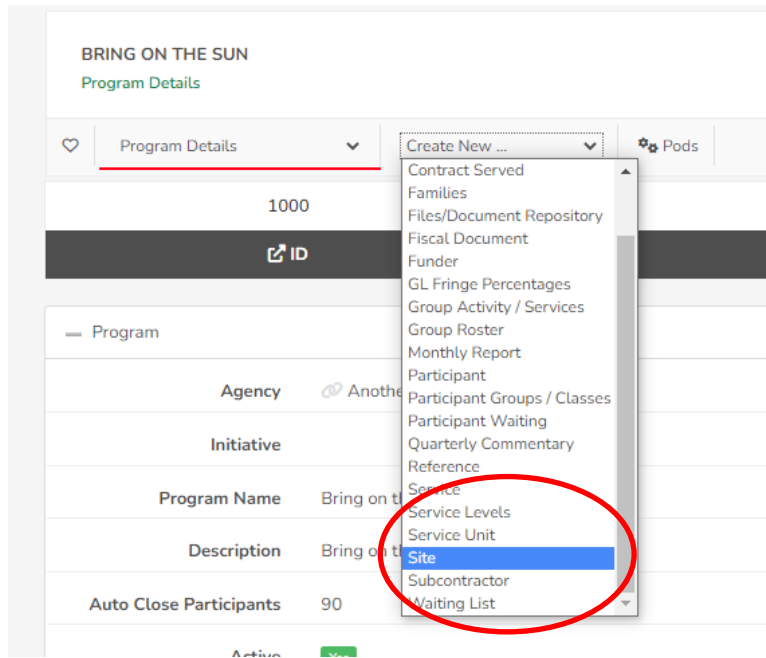
### Add Site in SAMIS

1. In the “Delivery” section click on the “Programs” tab to view your funded programs.
2. The next screen will display your agency’s funded program(s). Click on the “View” button next to the program that needs a new or additional site.



### Add Site in SAMIS (cont.)

- Click on the dropdown arrow next to the “Create New” and select “Site”.



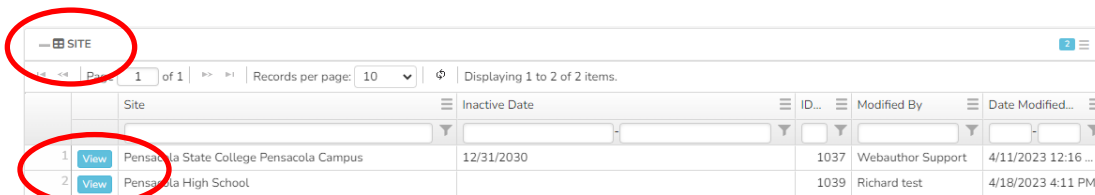
- Select the site you wish to add from the dropdown menu. There is an option to add an inactive date if you know when the site will no longer be used by your program. Keep in mind that this field is optional and can be updated at a later date.

### Helpful Hint

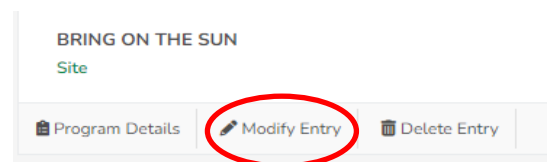
If the site you wish to add to your program is not found in the dropdown list. Please refer to the “SAMIS New Program Site Instructions” on the Escambia Children’s Trust (ECT) website under the SAMIS tab.

### Edit Site in SAMIS

- To edit a site, follow steps 1 and 2 in the Add Site in SAMIS found on the previous page.
- Scroll down to the “Site” section near the bottom of the program’s page and select the “View” button next to the site you want to edit.

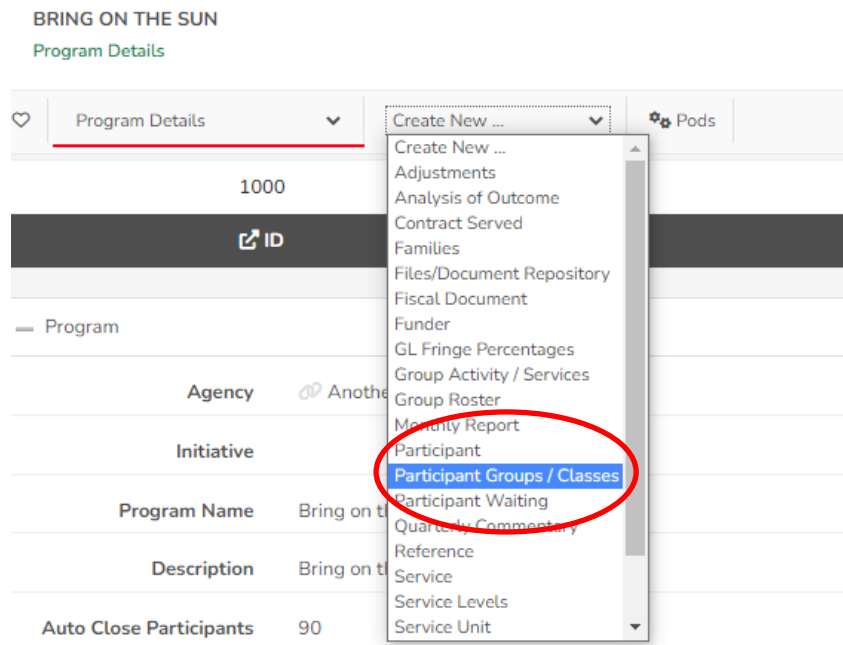


- Click on the “Modify Entry” button to begin editing. When you have finished editing don’t forget to hit save.



## Create a Group in SAMIS

1. To create a group, follow steps 1 and 2 in the Add Site in SAMIS found on the first page.
2. Click on the dropdown arrow next to the create new and select “Participant Groups / Classes”



3. Complete the “Site”, “Active”, and “Group Name” fields. The other fields are optional but they may be helpful to other members of the Provider: Program Group.
4. At the moment, select no for “Show Publicly” in the “Public Information” section.

### Helpful Hint

There are 2 ways to add participants to a group:

1. Create a new participant and link them to the group. Please refer to the “Provider: Program Group - Entering Participants in SAMIS” on the Escambia Children’s Trust (ECT) website under the SAMIS tab. This option works best for new participants being added in SAMIS.
2. At the bottom of the “Participant Groups / Classes” is a list of all your active program participants. Select the check boxes next to each participant you want add to the group. This option works best for participants who are already entered in SAMIS.

## Edit Group in SAMIS

1. To edit a group, follow steps 1 and 2 in the Add Site in SAMIS found on the previous page.
2. Scroll down to the “Participant Groups / Classes” section near the bottom of the program’s page and select the “View” button next to the group you want to edit.
3. Click on the “Modify Entry” button to begin editing. When you are finished don’t forget to hit save.