SAMIS

Provider: Financial Group

Creating Financial Workflows

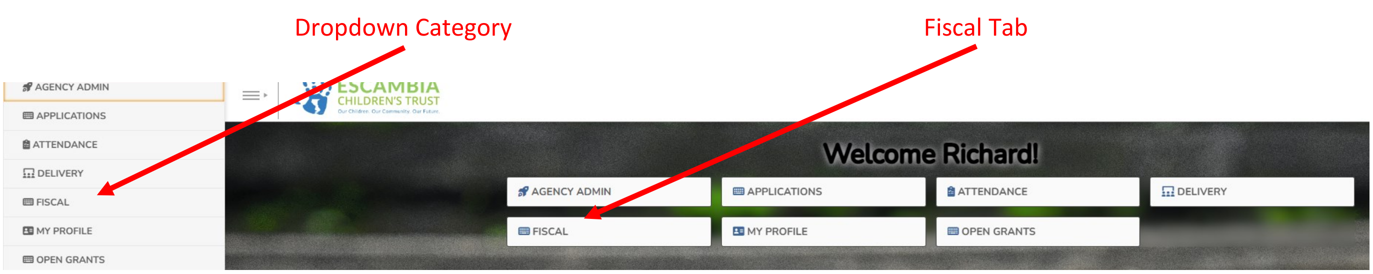
Before submitting a budget, amendment, or reimbursement for the first time you will need to create a workflow. A workflow is your organization's document approval process before submitting to Escambia Children's Trust (ECT). Each workflow is compromised of different steps. Two steps are required and the other is optional.

1. Creator (required) - collects and enters information into SAMIS
2. Reviewer (optional) - reviews creator's work to ensure everything is correct
3. Submitter (required) - submits document after being approved by reviewer

For example, Richard (creator) collects and enters financial reimbursement information into SAMIS. Next, Kimberly (reviewer) reviews Richard's work for accuracy. Finally, Tammy (submitter) takes one last look at the document and submits it to ECT for processing. Keep in mind that a workflow can be tailored to the size and capabilities of your organization. For smaller organizations, Richard can collect financial information, enter in SAMIS, review, and submit.

. 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 "Fiscal" section by either clicking on the dropdown category and selecting "Fiscal " or selecting the "Fiscal" tab.



Create a Workflow in SAMIS

1. In the "Fiscal" section hover your mouse over the down arrow next to "Workflow" and select "New Workflow Template".
2. Click on the down arrow next to "Enter Agency Name" and select the agency associated with this workflow.
3. Enter the "Workflow Template Title". Your organization can have many different workflows, so the title should be specific. For example, if the group submitting reimbursements differs between summer programs and school year programs the title should reflect those differences. Summer Program Reimbursement / School Year Program Reimbursement

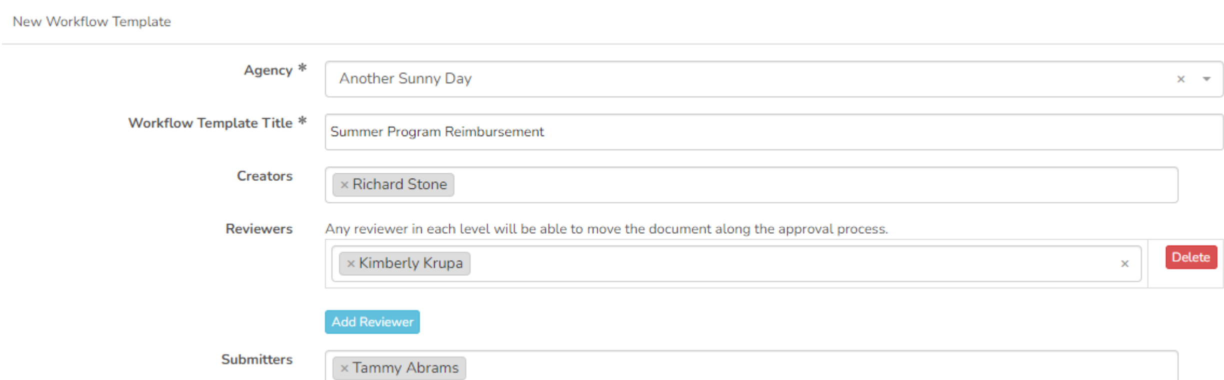
Create a Workflow in SAMIS (cont.)

4. Click in the “Select” box next to “Creators” to assign a user in the organization to start the workflow. Using the example on page one, Richard is the “Creator” because he collects and enters financial reimbursement information into SAMIS.

Helpful Hint

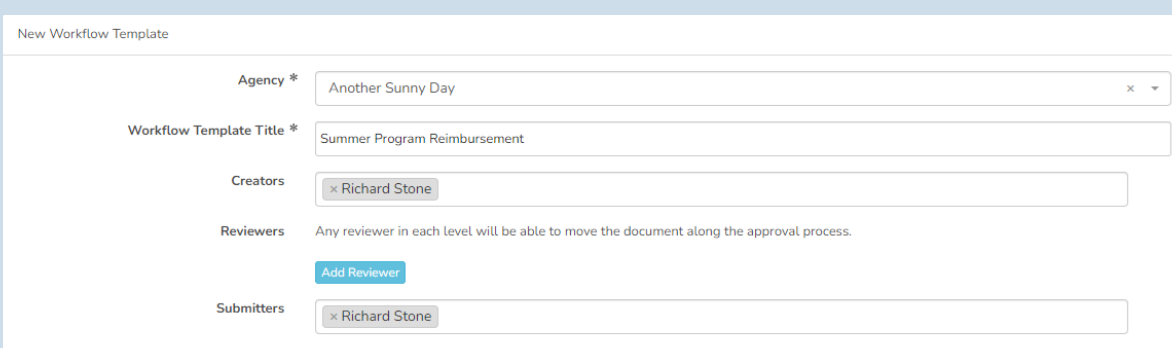
In order for a staff member’s name to appear in the “Creators”, “Reviewers”, and/or “Submitters” dropdown, your agency administrator needs to add them in SAMIS. Once added, the staff member needs to register their SAMIS account.

5. If you are going to have someone review Richard’s work, click on the blue “Add Reviewer” button. Click in the white text box to add a reviewer. Using the page one example, Kimberly is the “Reviewer” because she reviews John’s work to make sure everything entered is correct.
6. Click on the “Select” box next to “Submitters” to assign a user in the organization to submit the document to ECT. Referring to the example, Tammy is the “Submitter” because she takes one last look at the document and submits it to ECT for processing.
7. Click “Save Template” once complete.



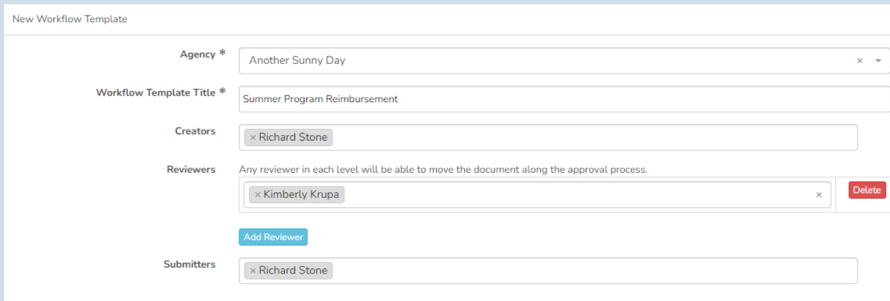
Different Examples

- Example 1 - from first page where Richard did all three actions. “Creator” = Richard, do not need a “Reviewer”, and “Submitter” = Richard.

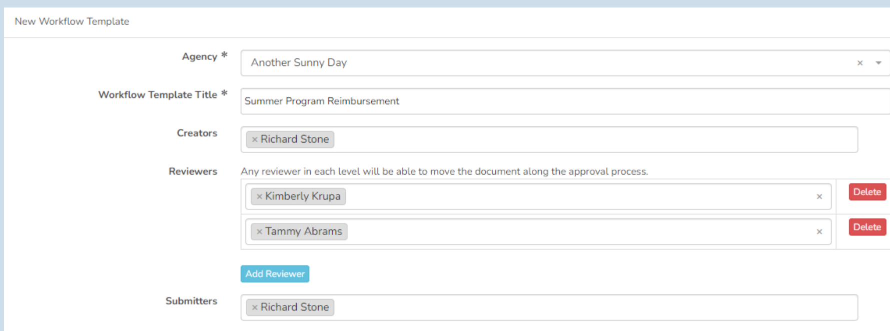


Different Examples cont.

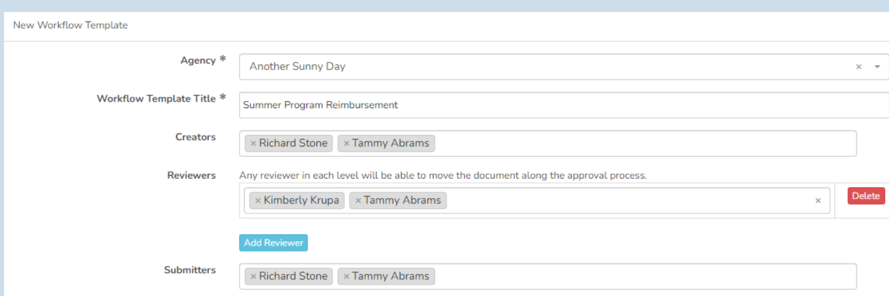
- Example 2 - Richard will create **and** submit the reimbursement / Kimberly will review. “Creator” = Richard, “Reviewer” = Kimberly, and “Submitter” = Richard.



- Example 3 - Richard will create and submit the reimbursement / Kimberly **and** Tammy will each review. “Creator” = Richard, “Reviewer” = Kimberly different line Tammy , and “Submitter” = Richard.



- Example 4 - Richard **or** Tammy will create and submit the reimbursement / Kimberly **or** Tammy will review. “Creator” = Richard same line Tammy, “Reviewer” = Kimberly same line Tammy , and “Submitter” = Richard same line Tammy.



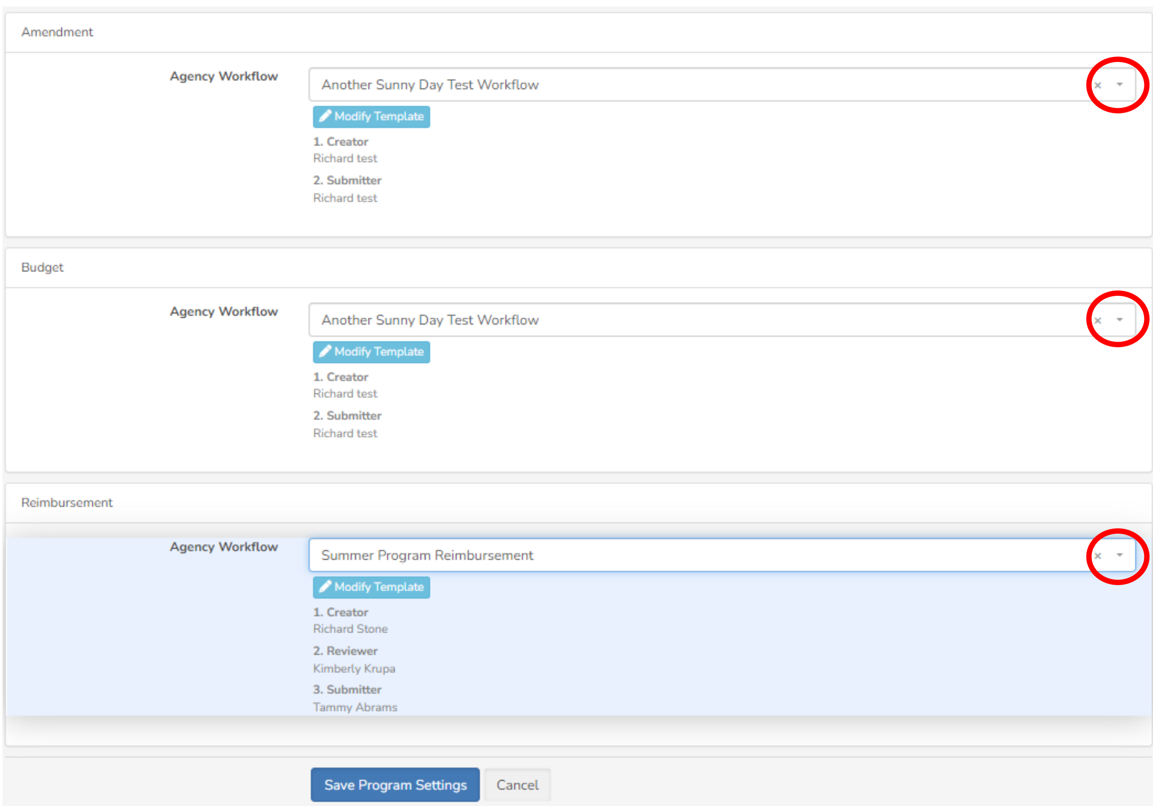
In the “Reviewers” section you can add an unlimited number of reviewers or none at all. If the reviewers names are on the same line only one needs to review the document (Example 4). If the reviewers are on separate lines (Example 3) each will need to review before submitting.

Only “Creators” will be able to initiate the workflow (start entering the agency reimbursement)

Assign Workflows in Your Program

1. In the “Fiscal” section hover your mouse over the down arrow next to “Workflow” and select “Program Workflow”.
2. Click “View” next to the agency and program to enter their workflow.

3. Click down arrow, circled in red below, to open a dropdown menu listing your agency’s workflows. Select a workflow for each field.



3. Click “Save Program Settings” when finished. **The above instructions can also be used to view or change assigned workflows.**

Helpful Hint

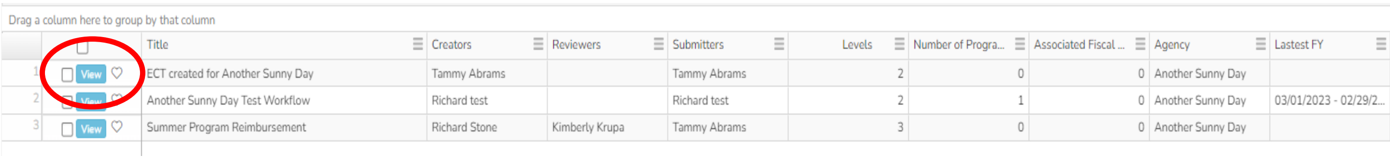
Looking at the example above, you have the ability to use different workflows for each field.

1. “Another Sunny Day Test Workflow” is used for “Amendment” and “Budget”
2. “Summer Program Reimbursement” is used for “Reimbursement”

Also, you can see the “Creator”, “Reviewer”, and “Submitter” for each workflow. This information can be used to determine if you need to edit or create a new workflow.

Edit a Workflow Template

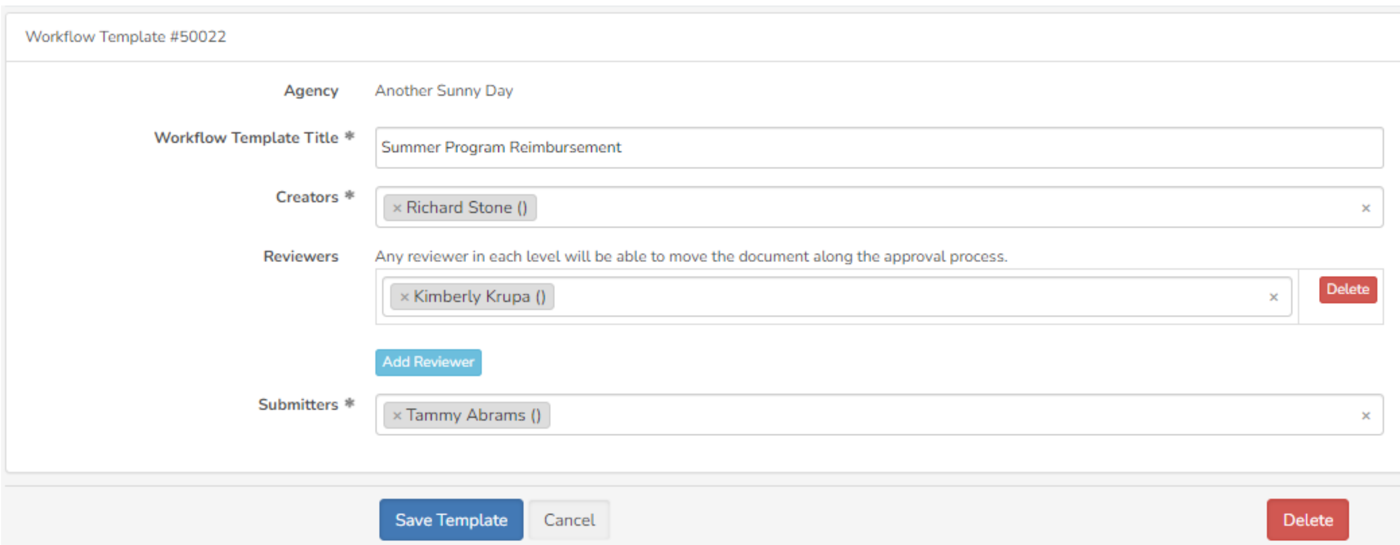
1. In the "Fiscal" section hover your mouse over the down arrow next to "Workflow" and select "Workflow Templates".
2. Click "View" next to the workflow you want to change.



Drag a column here to group by that column

		Title	Creators	Reviewers	Submitters	Levels	Number of Progra...	Associated Fiscal ...	Agency	Lastest FY
1	View	ECT created for Another Sunny Day	Tammy Abrams		Tammy Abrams	2	0	0	Another Sunny Day	
2	View	Another Sunny Day Test Workflow	Richard test		Richard test	2	1	0	Another Sunny Day	03/01/2023 - 02/29/2...
3	View	Summer Program Reimbursement	Richard Stone	Kimberly Krupa	Tammy Abrams	3	0	0	Another Sunny Day	

3. Follow the "Create a Workflow in SAMIS" instructions if you want to add staff to the workflow. Click on the "X" next to a persons name if you want to remove them from the workflow.



3. Click "Save Template" when finished.

SAMIS Notifications

When a workflow has been initiated by the creator, the next person in the workflow will receive 2 different notifications from SAMIS. An email will be sent and the document will be in the users "Fiscal Documents" queue. Following the "Summer Program Reimbursement" example, after Richard creates the reimbursement, Kimberly will receive an email letting her know there is a document in her fiscal queue for review. Once Kim has reviewed the document, the same notifications will be sent to Tammy.