

SAMIS

Provider: Financial Group



Fiscal Reports

Three fiscal reports are available to members of the Provider: Financial Group. These reports contain the same information provided in the “Fiscal Documents” section, but give users the option to download the information in XLS or PDF formats. The 3 fiscal reports are:

1. Budget Amendment Detail
2. Budget Summary
3. Reimbursement Detail

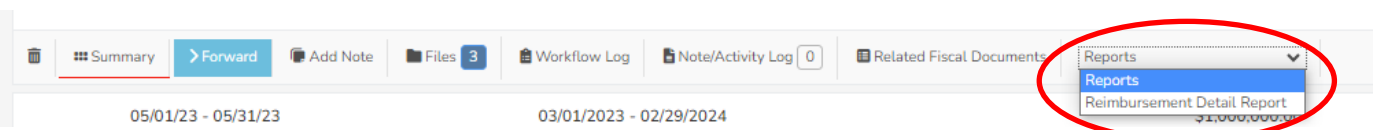
The instructions below will explain 2 different ways to access these fiscal reports.

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.

Fiscal Report Option 1

1. Go to the “Fiscal” section by either clicking on the dropdown category and selecting “Fiscal” or selecting the “Fiscal” tab.
2. In the “Fiscal” section, click the “Fiscal Documents” tab.
3. Click on the blue “View” button next to the fiscal document you wish to access
4. Click the dropdown arrow next to reports and select the associated fiscal report.

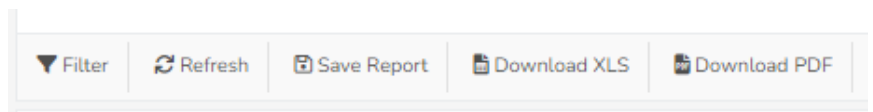


Helpful Hint

In above example, the report is pulled from a reimbursement request. Therefore the only report available in the dropdown is “Reimbursement Detail”. If you were in a budget document, “Budget Summary” would be the only available option.

5. Once the report has been generated you have 3 options:

- Save the report
- Download an XLS file
- Download a PDF file



Fiscal Report Option 2

1. Go to the “Fiscal” section by either clicking on the dropdown category and selecting “Fiscal ” or selecting the “Fiscal” tab.
2. In the “Fiscal” section, click the “Reports” tab.
3. Click on the fiscal report you wish to generate.
4. You will then need to complete the “Set Report Filters”.

Set Report Filters: Reimbursement Detail ×

Filters

Program Active Year * Program Active Year is required

Begin Date

End Date

Program * Program is required

Status

Reimbursement *

5. After completing the “Set Report Filters” click the blue “Run Report” button.
6. Once the report has been generated you have 3 options:
 - Save the report
 - Download an XLS file
 - Download a PDF file

