SAMIS 2.0

Client Data Gatherer
&
Performance Measurements

Quick Training Guide

Presented by: Community Services Department

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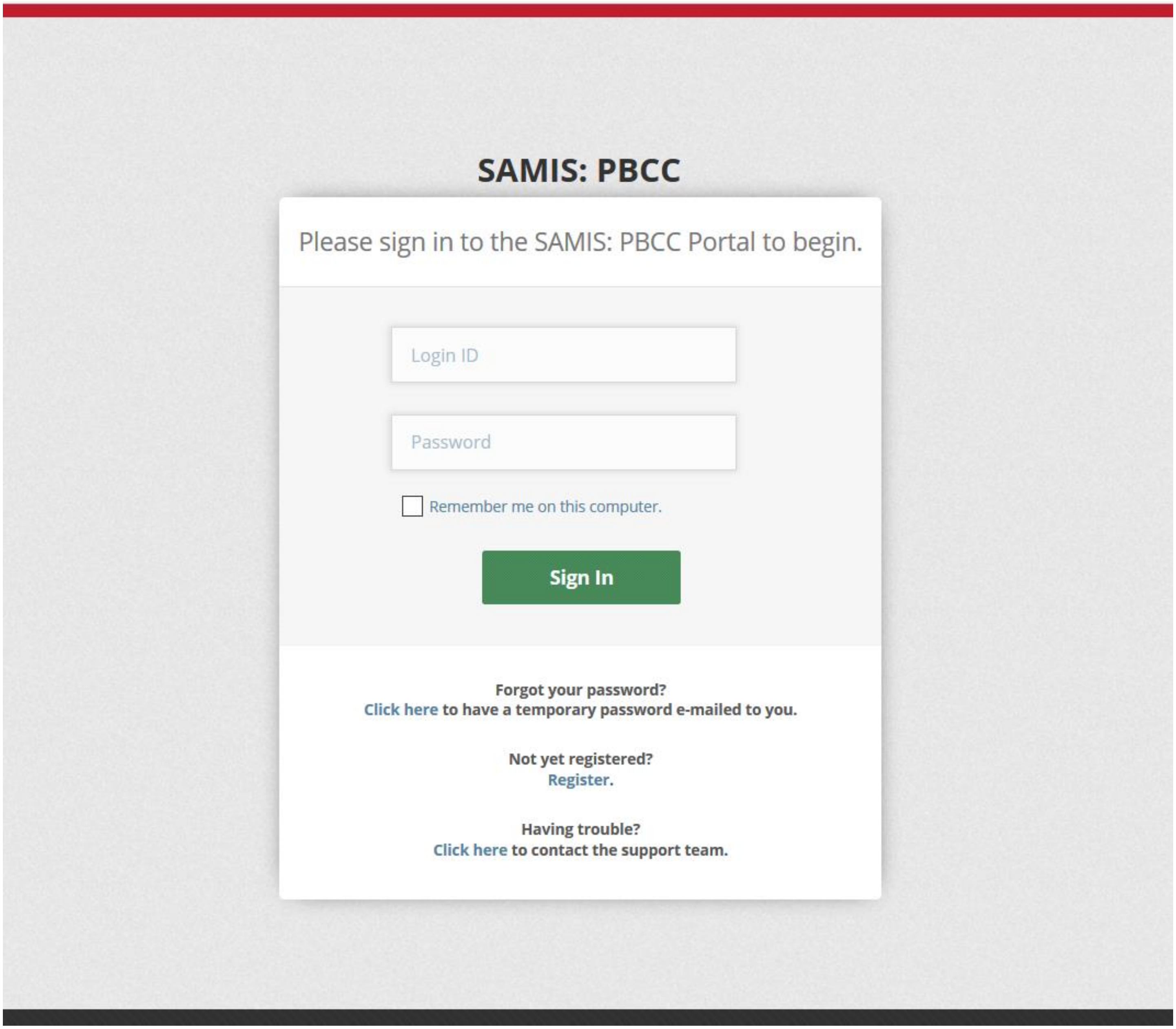
LOG IN –

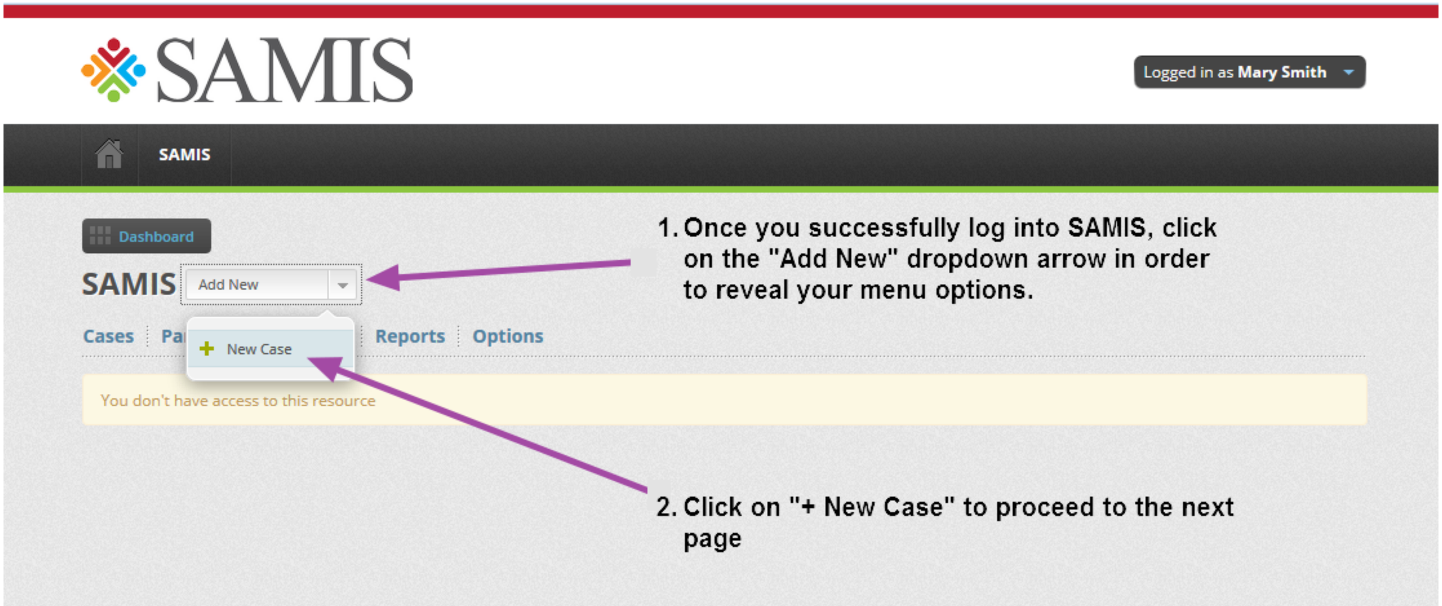
- https://pbcc.samis.io/
- SAMIS 2.0 is compatible with Google Chrome and Mozilla Firefox.
- Use the same log-in as SAMIS 1.0. If you are a new user, please contact Pedro Medina (pmedina@pbcgov.org) for the necessary forms in order to set up new users.

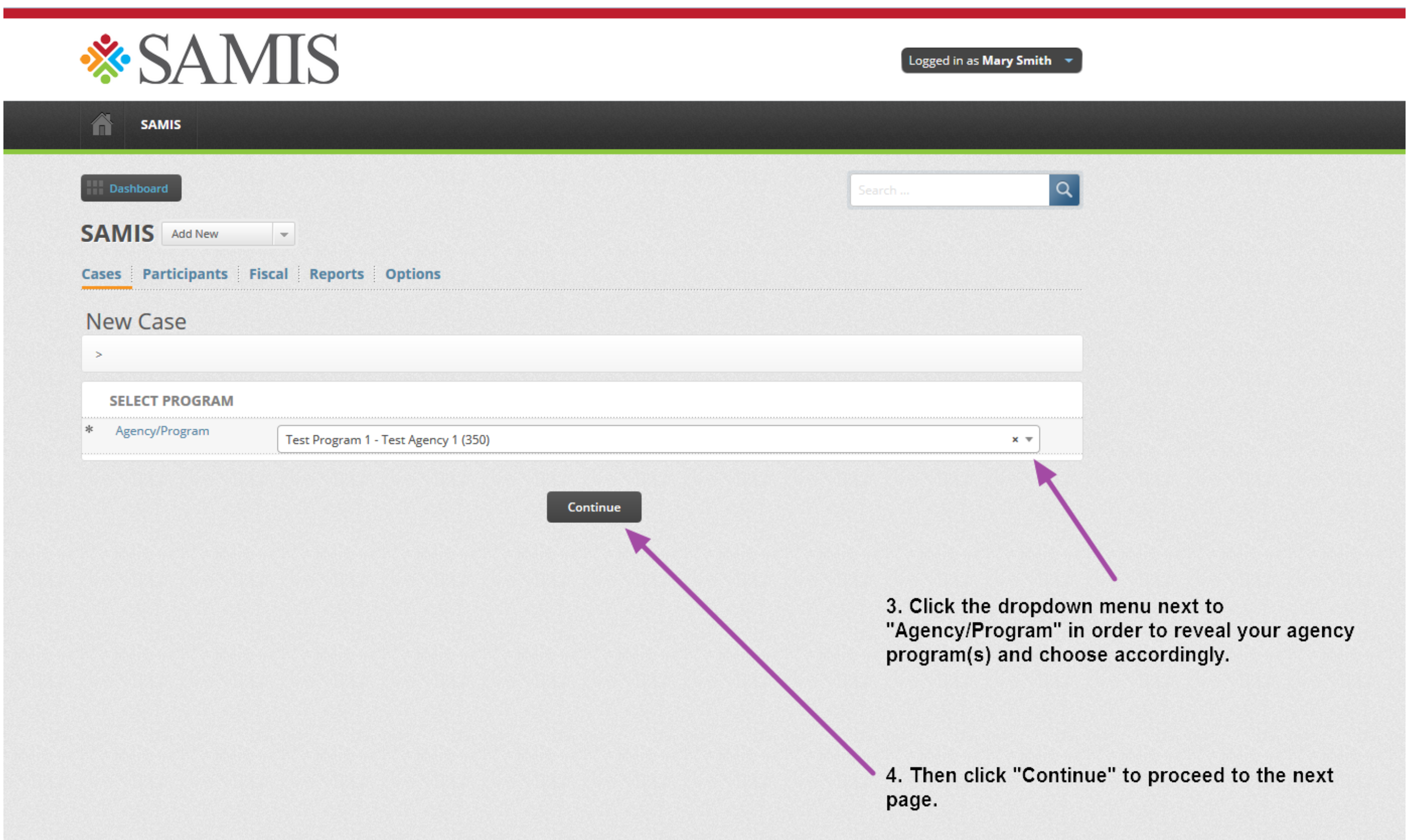


CASE DATA GATHERER –

The Case Data Gatherer is the client side of SAMIS. The agencies enter a case for their clients/participants and are responsible for answering the Performance Measure (PM) questions provided by Community Services. The performance measures will help Community Services make sure that the clients of Palm Beach County are receiving and responding to the services the agencies are providing.

OPENING A NEW CASE –





OPENING A NEW CASE (CONT.) –

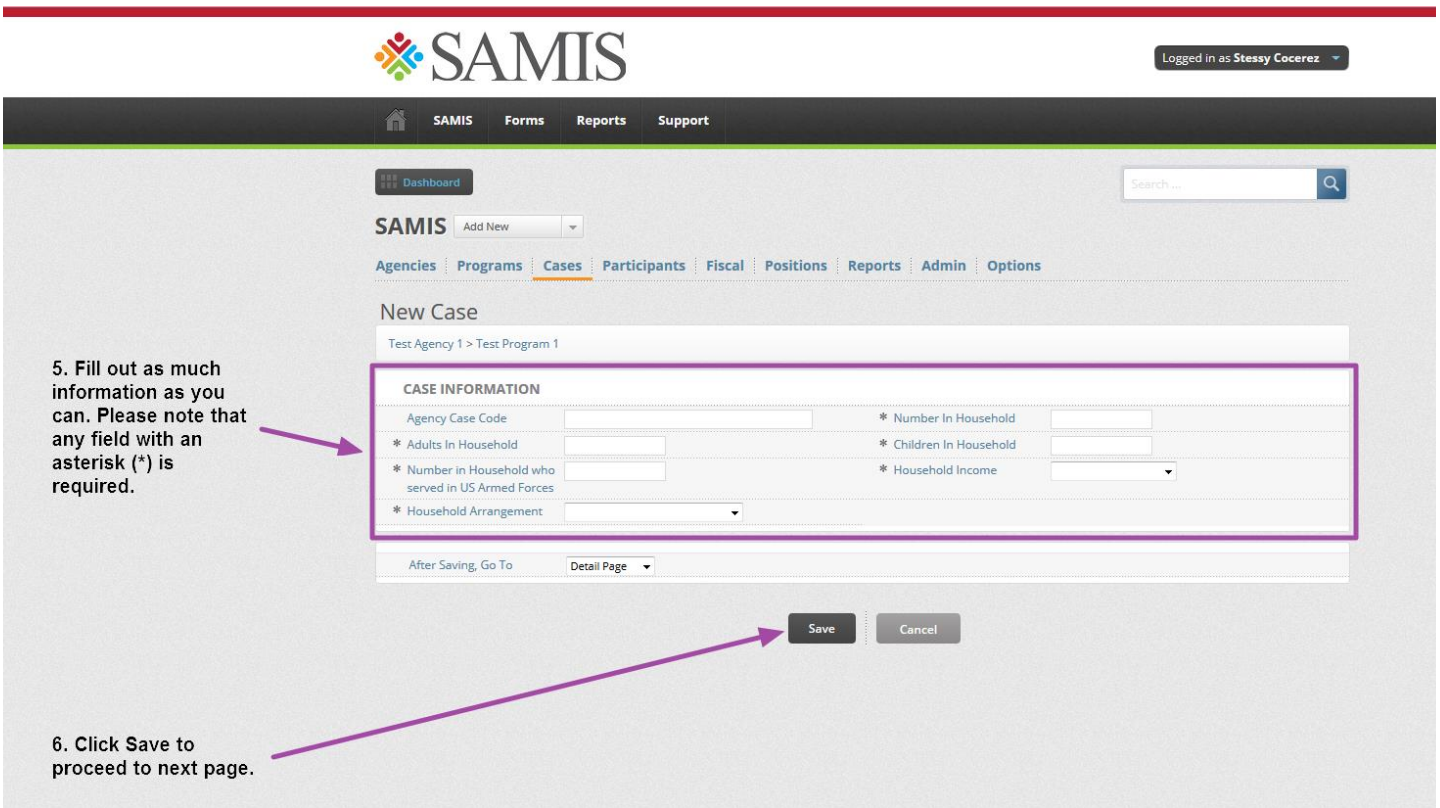
The following fields will be required for each case: If N/A, enter a zero (0)

- Number in Household – Persons living with Client/Participant
- Adults in Household – # of Adults in the Household (18+)
- Children in Household - # of Children in the Household (Birth thru 17)
- Number in Household who served in US Armed Forces – As stated
- Household Income – Select Range of the Household Income
- Household Arrangement – Homeless; Dependent Living; Foster Care; Independent Living; In An Institution; Supportive Independent Living, or Unknown

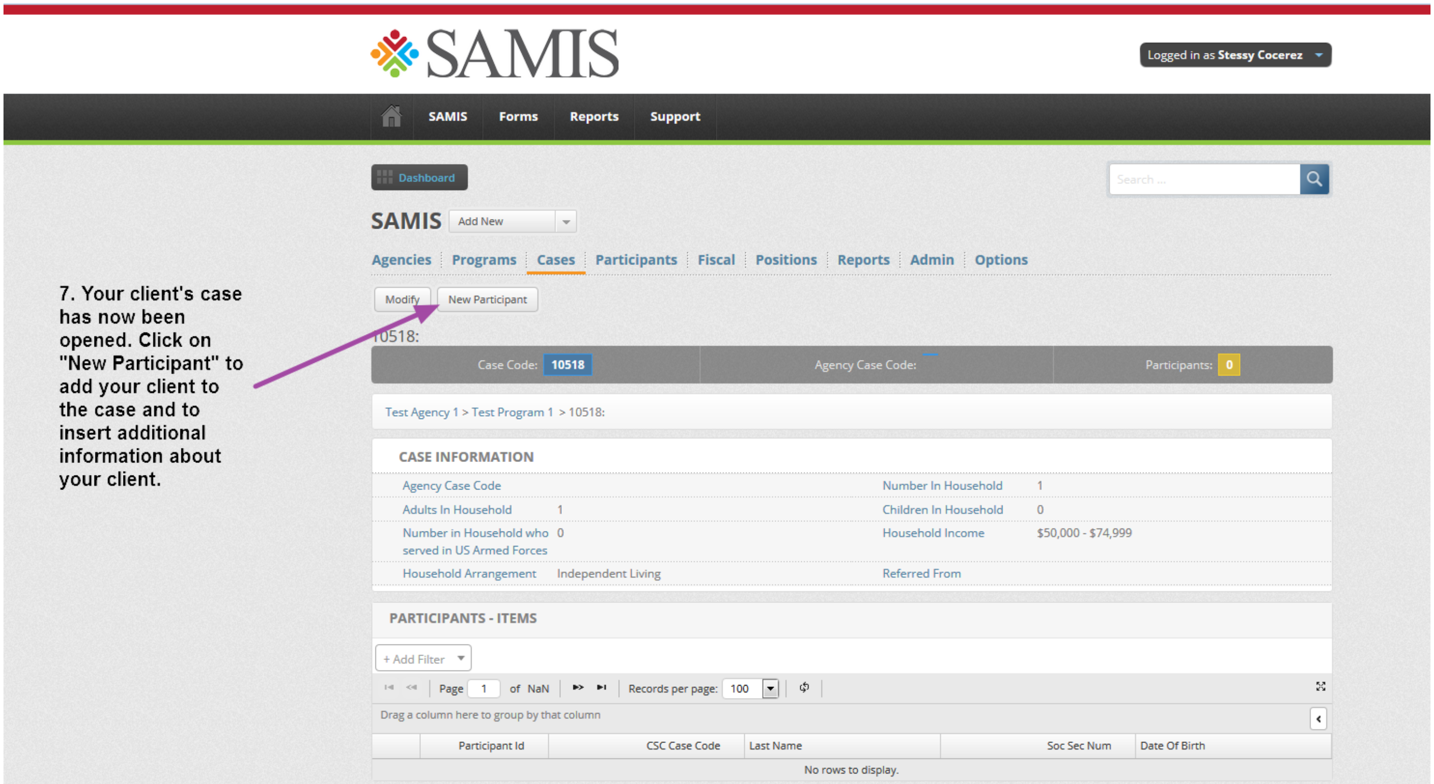
The following fields will be optional but recommended for each case:

- Agency Case Code – This is your field that you can use to tie this case to an existing internal database that you currently use for your client/participant data.

NOTE: Please remember to only do one participant per case.



OPENING A NEW CASE (CONT.) –



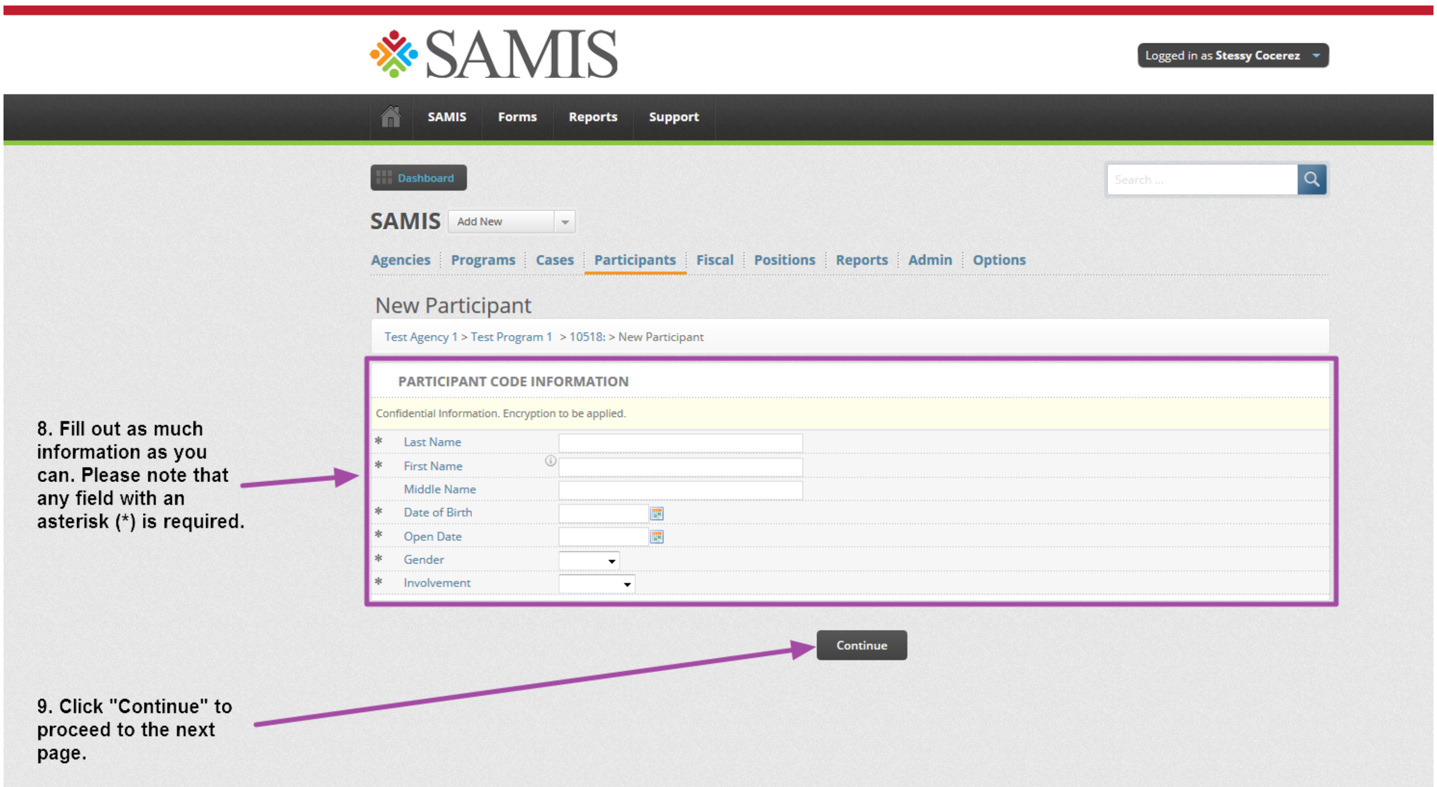
OPENING A NEW CASE (CONT.) –

The following fields will be required:

- Last Name – As stated
- First Name – As stated
- Date of Birth – As stated, be careful when entering this field (Format: mm/dd/yyyy)
- Open Date – Date the Client/Participant entered this program (Format: mm/dd/yyyy)
- Gender – As stated
- Involvement – This will ALWAYS be "Primary" as each client/participant should have their own case.

The following field is optional when searching for each participant:

- Middle Name – As stated; Must be entered here if you are using it



OPENING A NEW CASE (CONT.) –

The following fields will be required for each participant in addition to the search fields above:

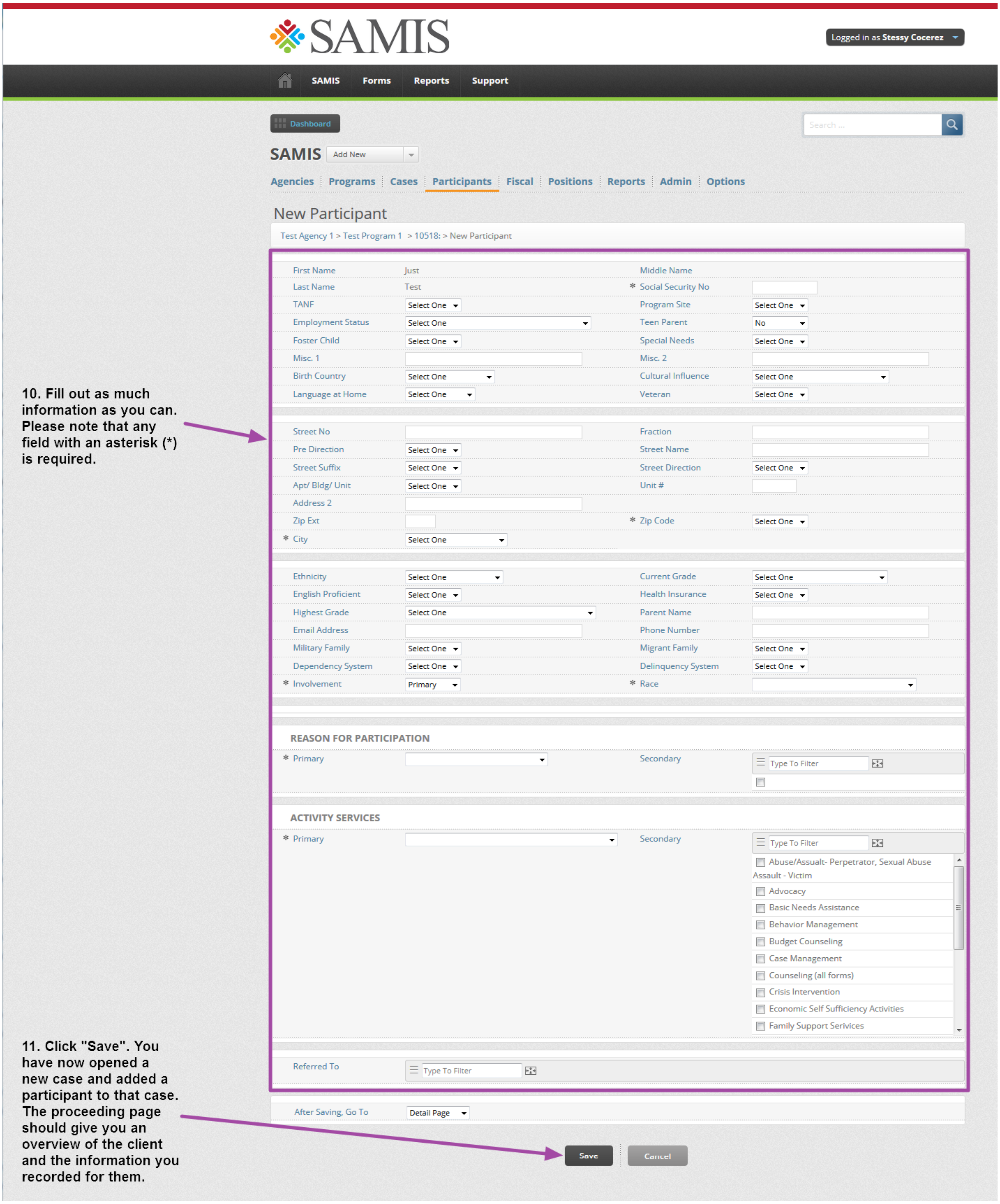
- Social Security No – As stated; NO DASHES; if not required by program, use 999999999.
- Veteran – If Number in Household who served in US Armed Forces is > 0
- Zip Code – Predefined List when selected populates the City/ies in that zip code
- City – Pre-populated by associated selected Zip Code
- Involvement (Primary/Secondary; Selected is the Measured Activity)
- Race – As stated
- Reason for Participation (Primary); choose the best option for your program
- Activities/Services (Primary); choose the best activity/service provided to your client

The following fields will be optional but recommended for each case:

- TANF – Yes/No
- Program Site (Appears only if entered by the SAMIS Administrator)
- Employment Status – Work 40+ Hours per Week; Work less than 40 Hours per Week; Not Employed; Full-Time Student; Part-Time Student; On Disability; On Temporary Medical or Administrative Leave; or Retired
- Teen Parent – Yes/No
- Foster Child – Yes/No
- Special Needs – Yes/No
- Misc. 1 – 100 Characters; Can be used for client/participant data to be determined by you and Community Services – Field Label is modifiable
- Misc. 2 – 100 Characters; Can be used for client/participant data to be determined by you and Community Services – Field Label is modifiable
- Birth Country – Canada; Colombia; Cuba; Declined; Dominican Republic; Haiti; Jamaica; Mexico; Nicaragua; Other; Peru; or United States
- Cultural Influence – American; Central/South America-Hispanic; Cuban, Declined; Dominican; English; German; Haitian; Irish; Italian; Other; Polish; Puerto Rican; Russian; or West Indian
- Language at Home – Creole; Declined; English; French; Other; Portuguese; Sign Language; or Spanish
- Participant Address – As stated
- Ethnicity – Hispanic or Latino; or Not Hispanic Latino
- Current Grade – Not Attending Preschool Age; Attending Preschool Age; Not Attending Not Preschool Age; Kindergarten; 1st; 2nd; 3rd; 4th; 5th; 6th; 7th; 8th; 9th; 10th; 11th; 12th; College; or N/A
- English Proficient – Yes/No
- Health Insurance – Yes/No
- Highest Grade – Trade/Vocational School; Less than High School Diploma/Equivalent(GED); High School Diploma/Equivalent(GED); Some College; Associate's Degree; Bachelor's Degree; Graduate Degree; Refused; or Unknown
- Parent Name – As stated
- Email Address – As stated
- Phone Number – As stated
- Military Family – Yes/No

- Migrant Family – Yes/No
- Dependency System – Yes/No
- Delinquency System – Yes/No
- Episode Data – Not Usually Used by Agencies
    - Assessment Date – As stated
    - FSP-Completed by 3rd Contact – Yes/No
    - FCP-Family Solution Plan Date – As stated
    - Number of Home Visits Scheduled – As predicted
    - Number of Home Visits Received - Actual
    - Number of face to face contacts – As stated
    - Number of collateral contacts - Others
    - Number of groups participating in – As stated
    - Number of referrals – As stated
    - Number of linked (confirmed) referrals – As stated
    - Parenting pretest – Score
    - Wellbeing pretest – Score
    - Emotional Support pretest – Score
    - Material support pretest – Score
    - Caring for child pretest – Score
    - Parenting posttest – Score
    - Wellbeing posttest – Score
    - Emotional Support posttest – Score
    - Material support posttest – Score
    - Caring for child posttest – Score
    - Strength-based Inventory
    - Reason for Participation (Secondary) – As stated; Can be multiple
    - Activities/Services (Secondary) – As stated; Can be multiple
- Referred To – Currently Not Used

OPENING A NEW CASE (CONT.) –

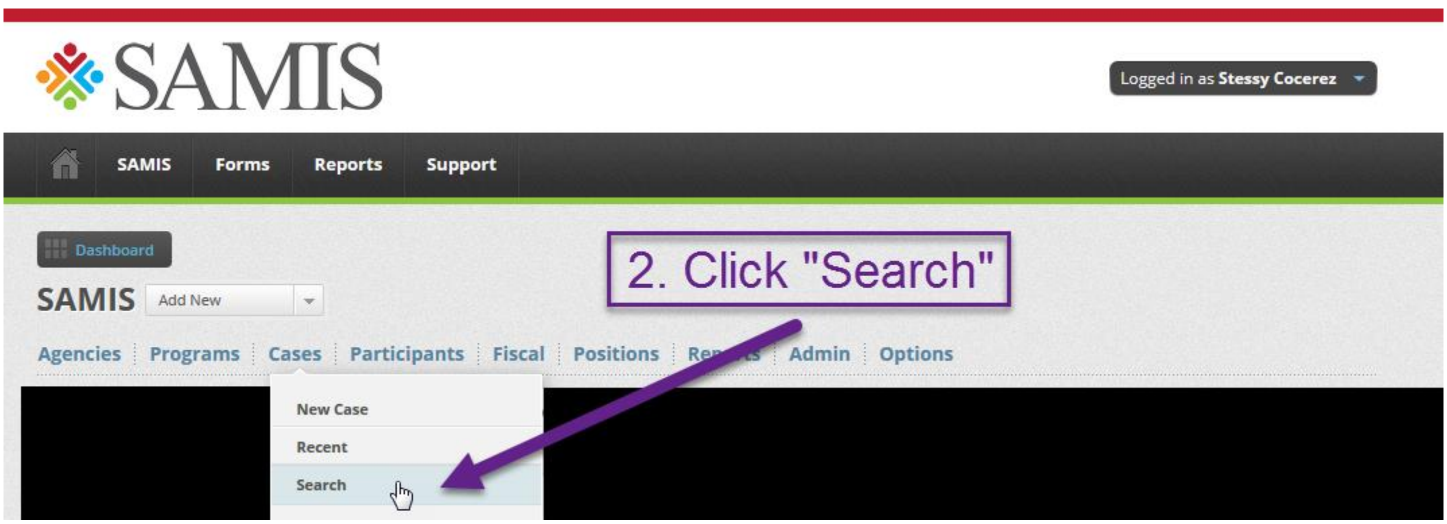


10. Fill out as much information as you can. Please note that any field with an asterisk (*) is required.

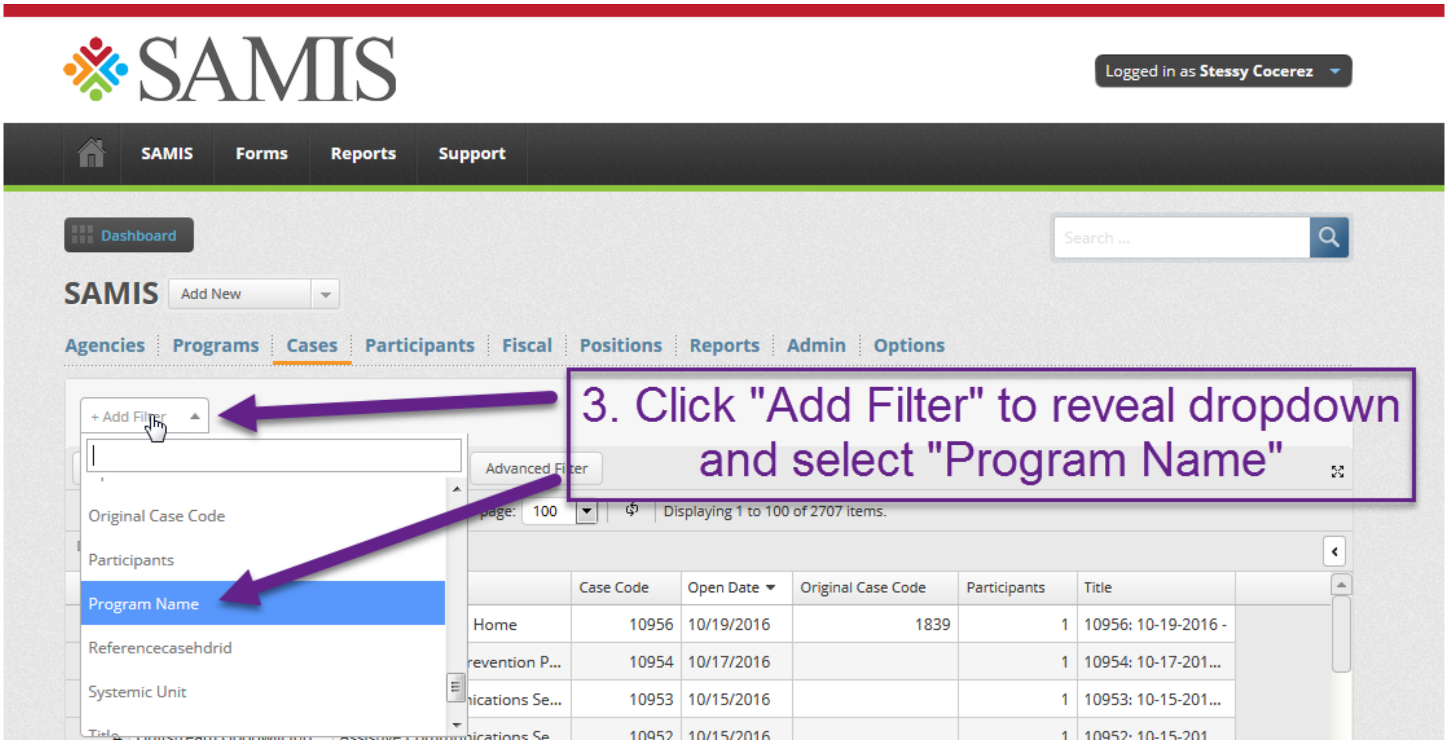
11. Click "Save". You have now opened a new case and added a participant to that case. The proceeding page should give you an overview of the client and the information you recorded for them.

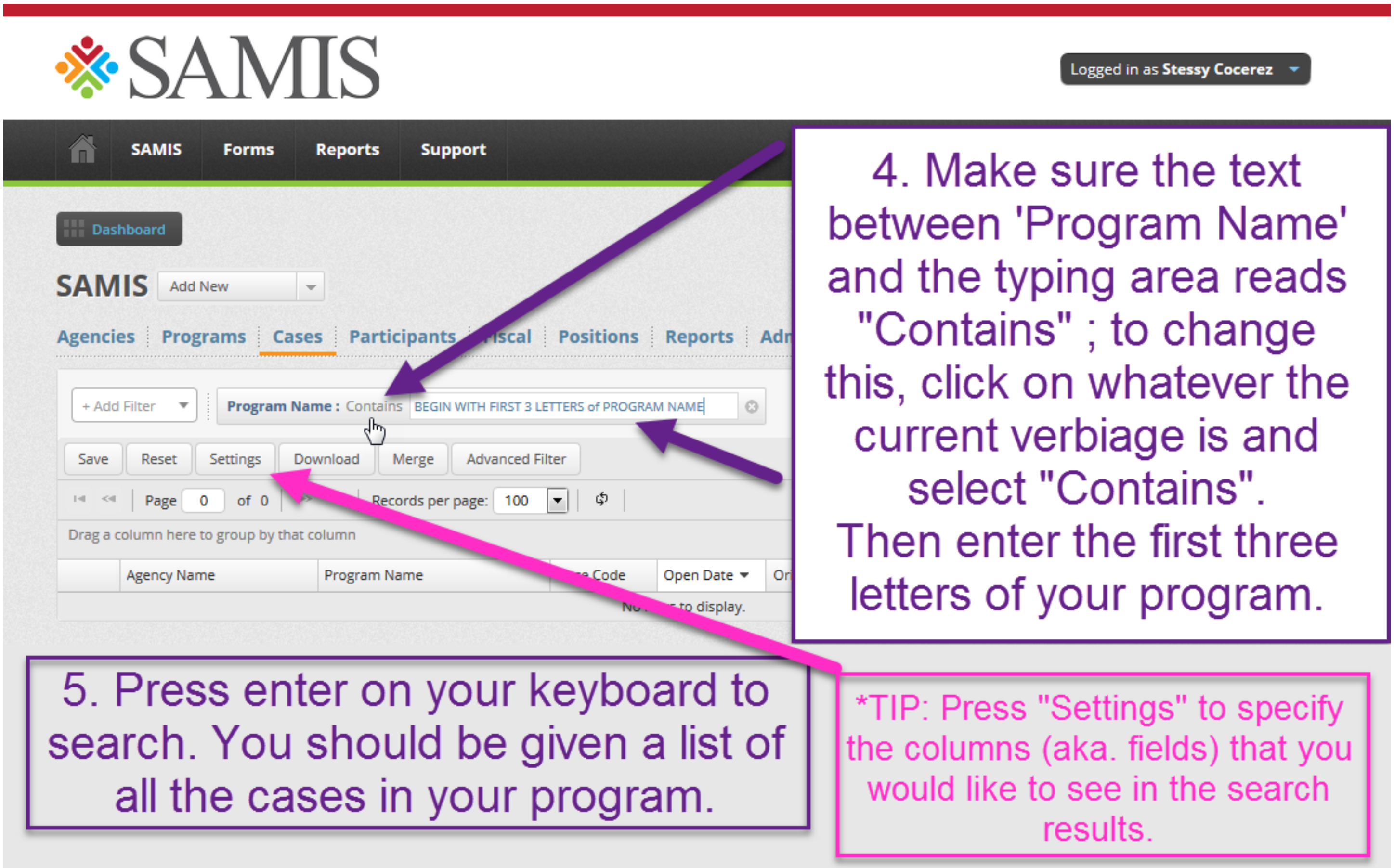
<u>SEARCH FOR CLIENT CASES –</u>

- If you need to search for a client case in order to make a change or verify information, please refer to the following instructions
- This will also be utilized when it comes time to close out your client case and enter your client performance measurement.



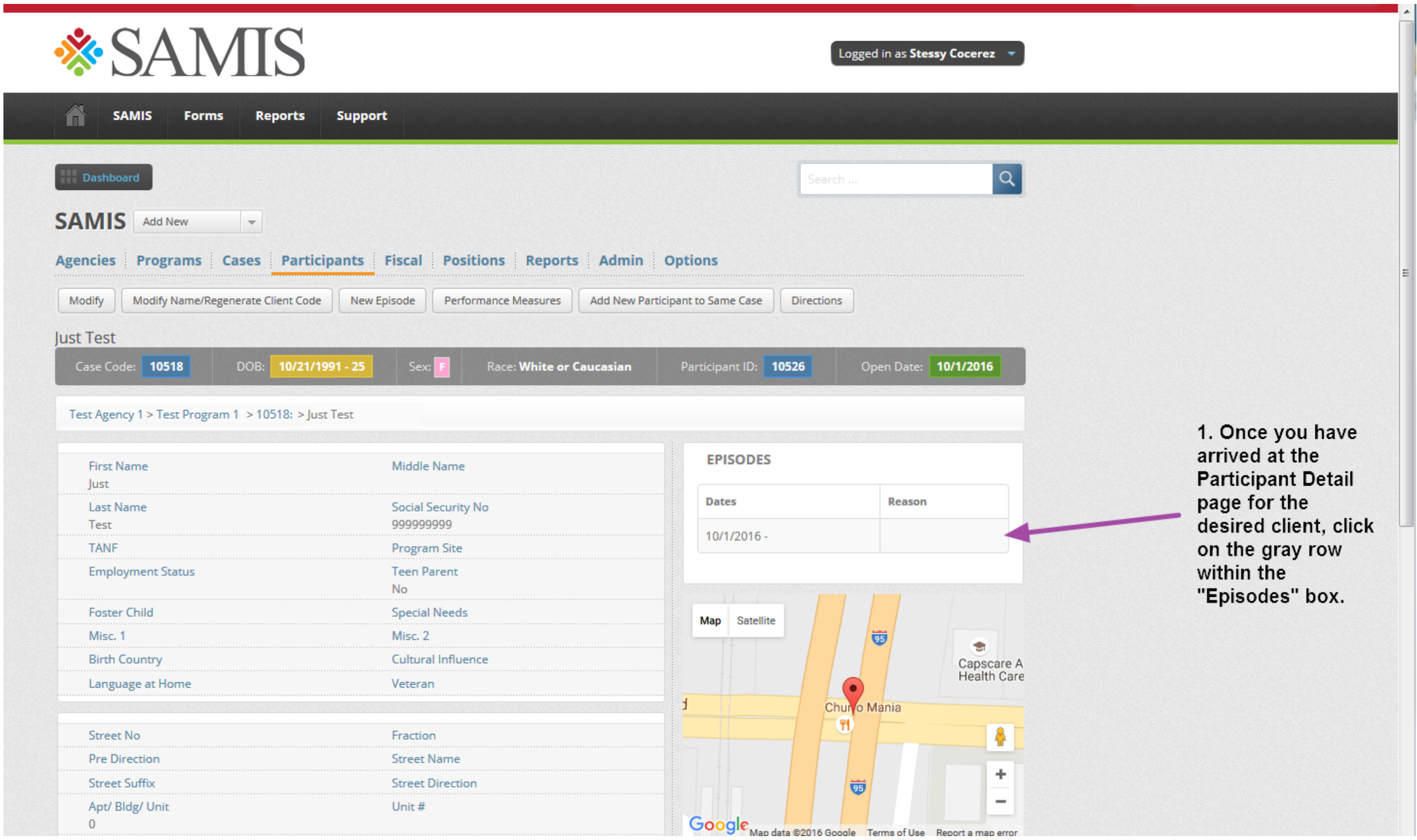
SEARCH FOR CLIENT CASES (CONT.) –

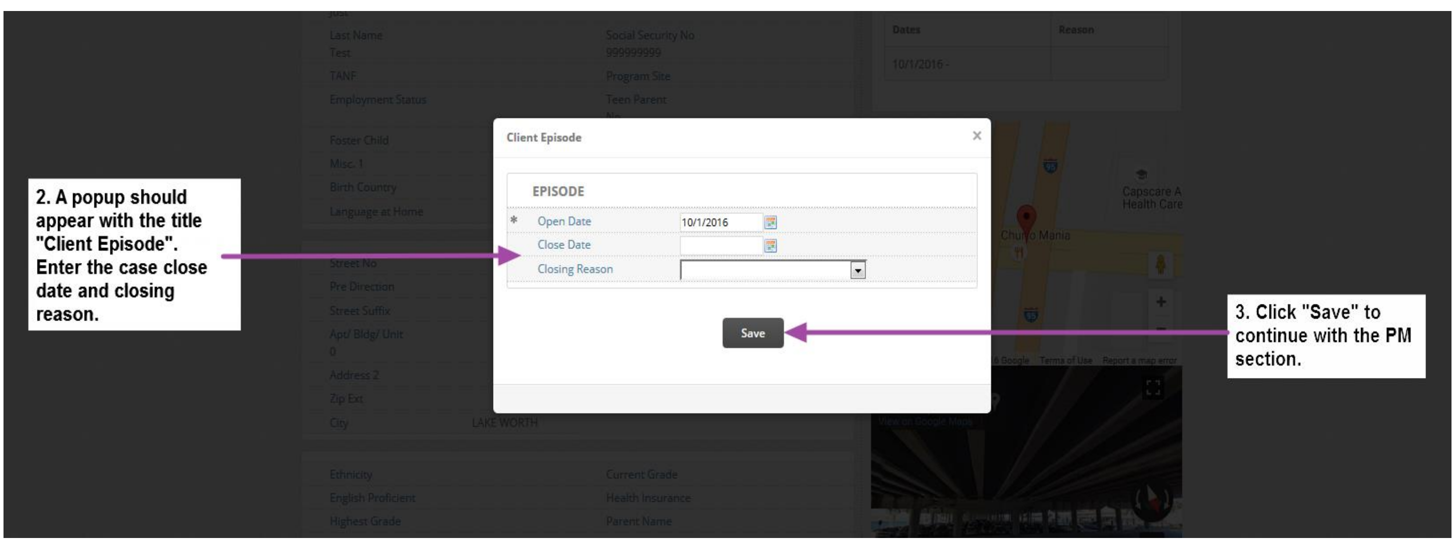




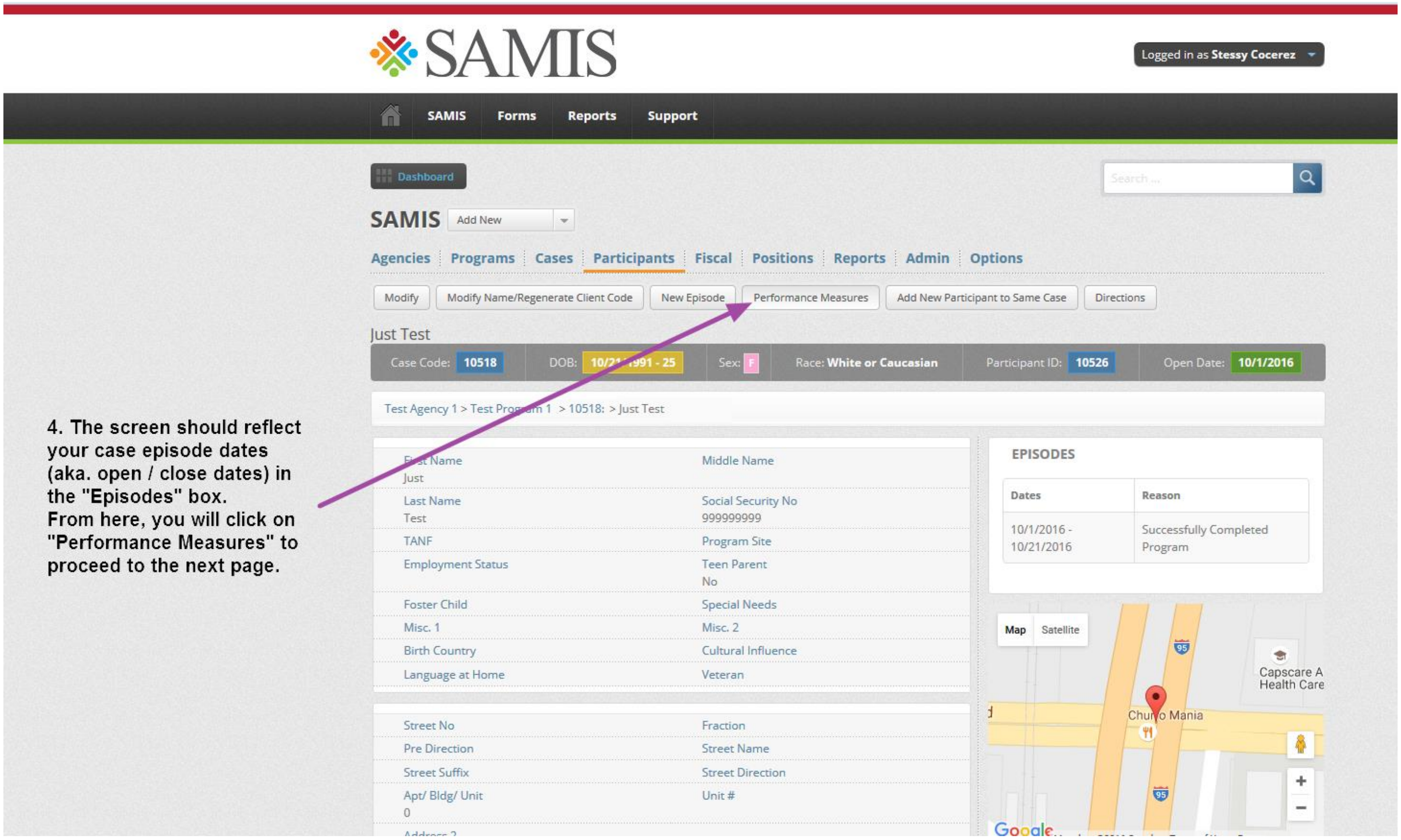
CLOSING A CASE –

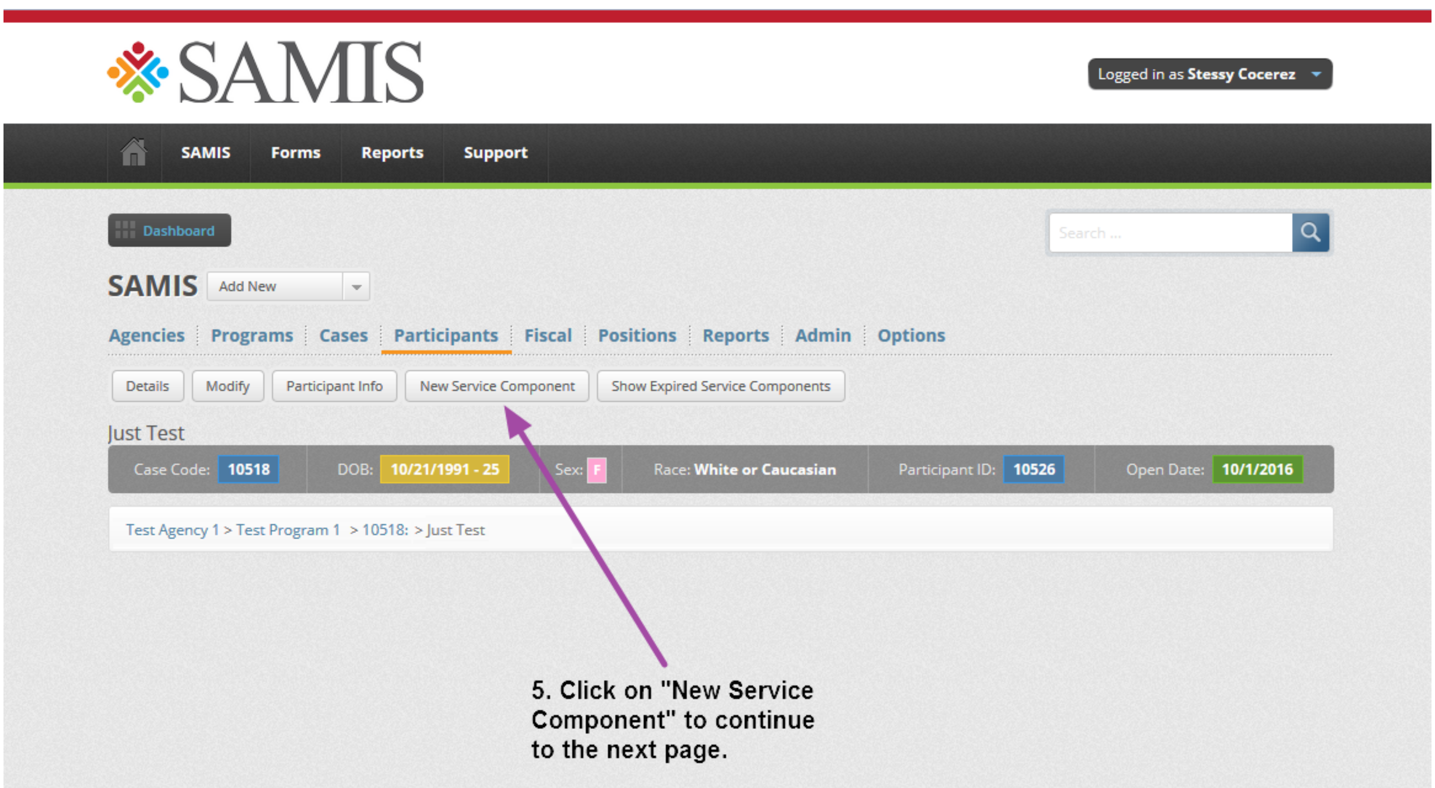
Enter your client/participant performance measure as directed by the database instructions spreadsheet. This is also the time to Close the Case/Episode and enter the Closing Reason.





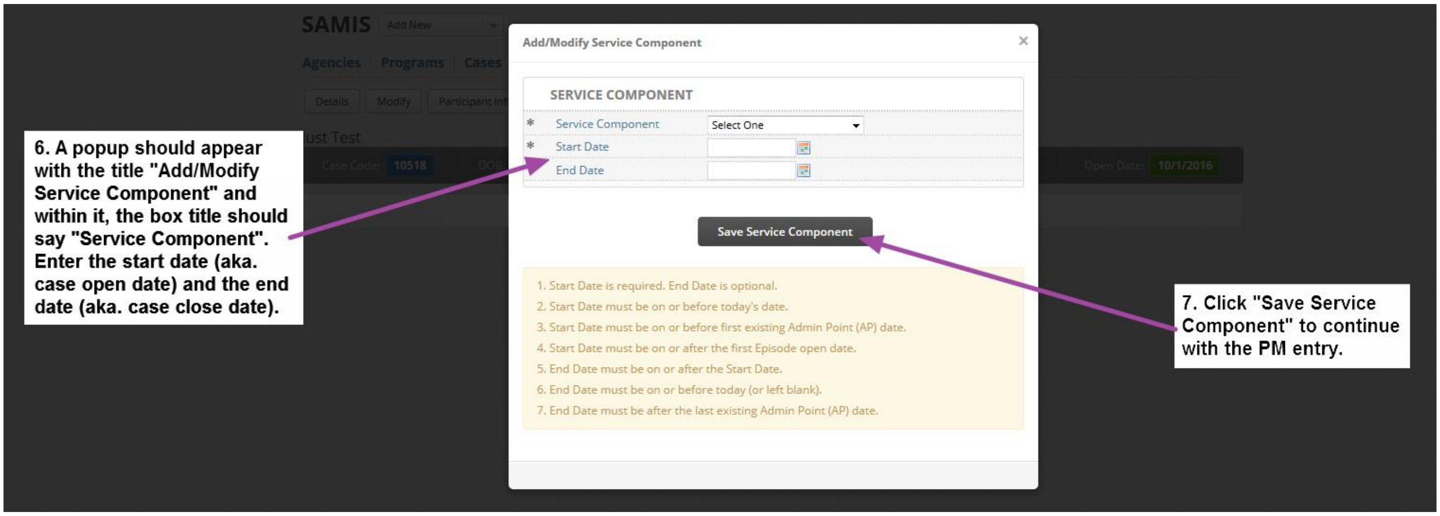
ENTERING A PERFORMANCE MEASUREMENT (PM) –

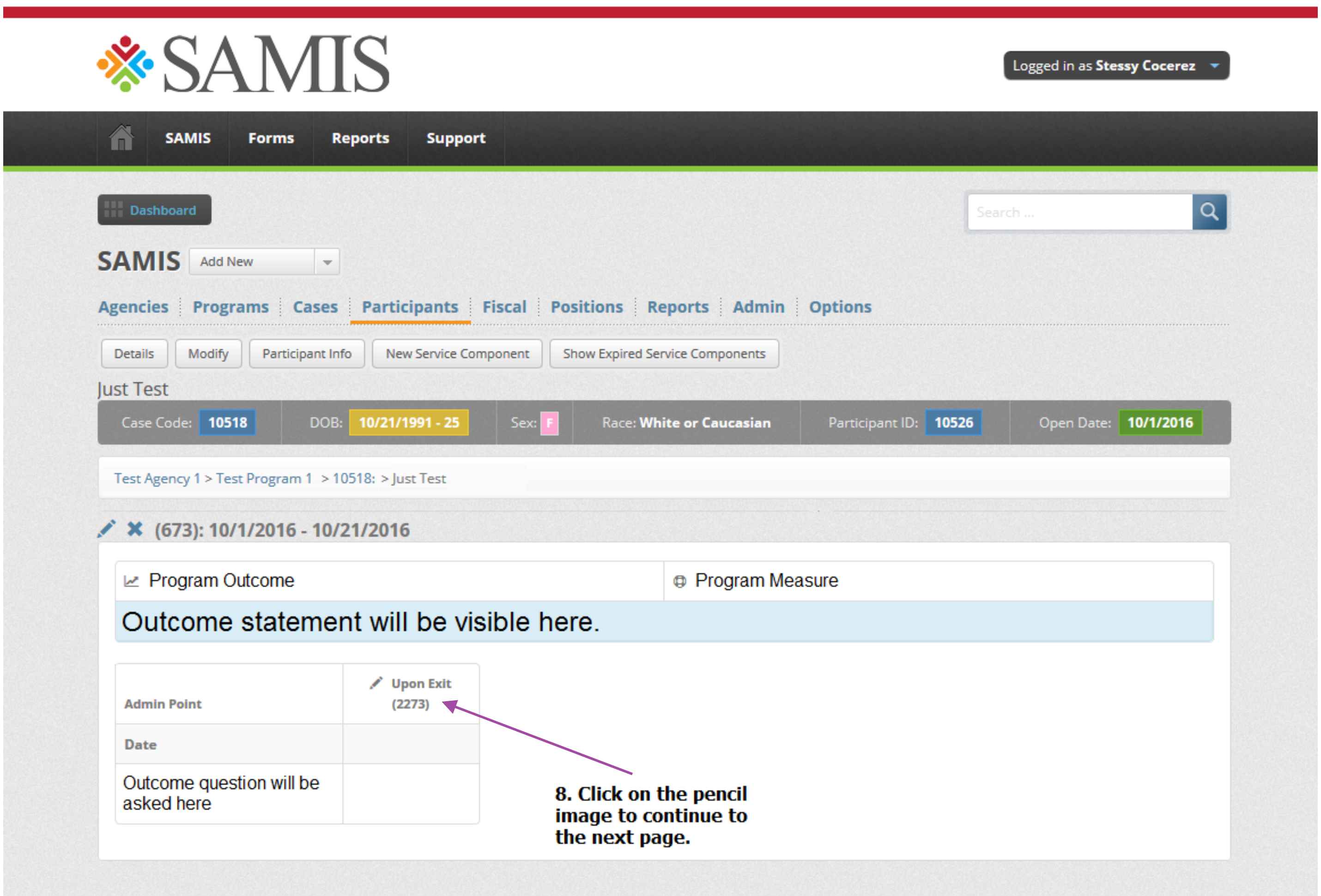




ENTERING A PM (CONT.) –

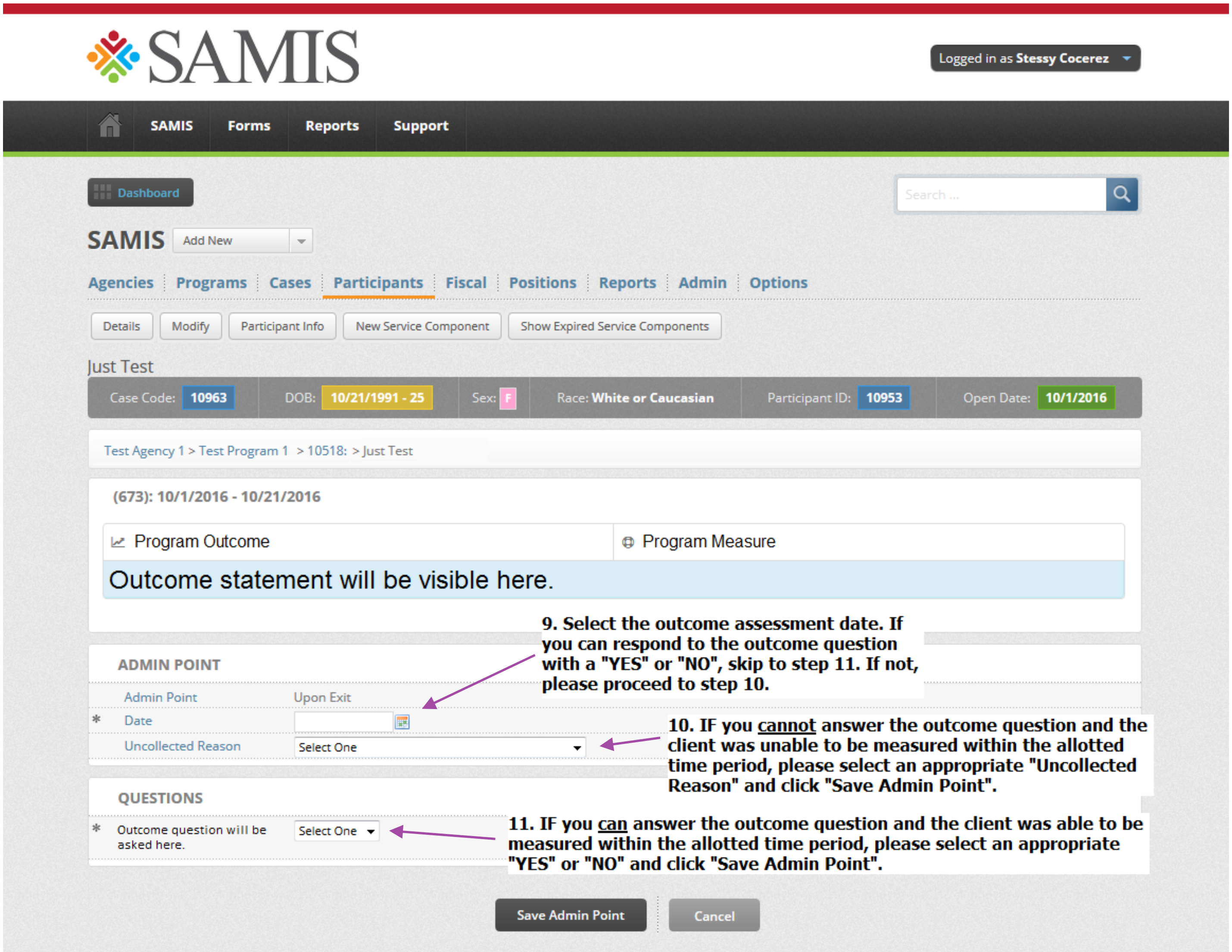
- Click to Select the Available Service Component (AKA: Service Category in FAA)
- Enter Component Start Date (First Episode Date/Case Open Date ; Format: mm/dd/yyyy)
- Enter Component End Date (Closing Date ; Format: mm/dd/yyyy)





ENTERING A PM (CONT.) –

- Enter the Admin Point Date (Date Final Assessment Completed/Close Date ; Format: mm/dd/yyyy)
- Answer the Question – Yes/No
- Select an Uncollected Reason IF you cannot answer "YES" or "NO" for the PM; otherwise leave blank.



ENTERING A PM (CONT.) –