



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@pbccgov.org) for the necessary forms in order to set up new users.

SAMIS: PBCC

Please sign in to the SAMIS: PBCC Portal to begin.

Login ID

Password

☐ Remember me on this computer.

Sign In

Forgot your password?
[Click here](#) to have a temporary password e-mailed to you.

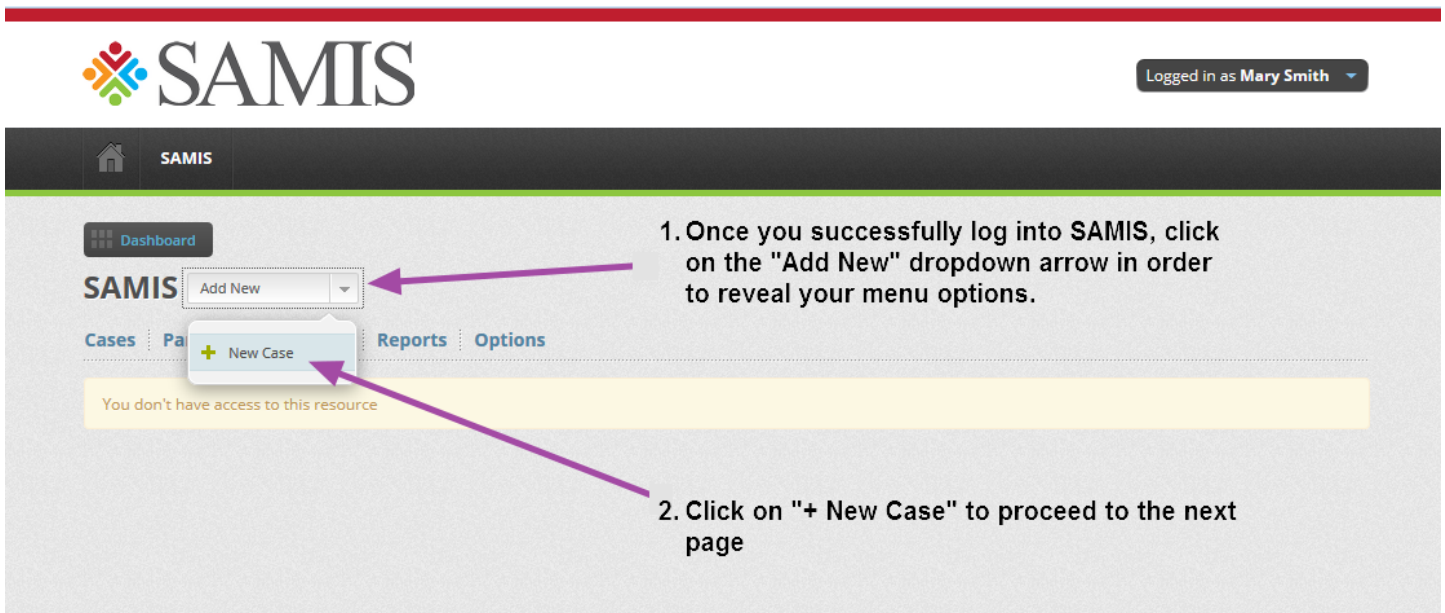
Not yet registered?
[Register.](#)

Having trouble?
[Click here](#) to contact the support team.

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.

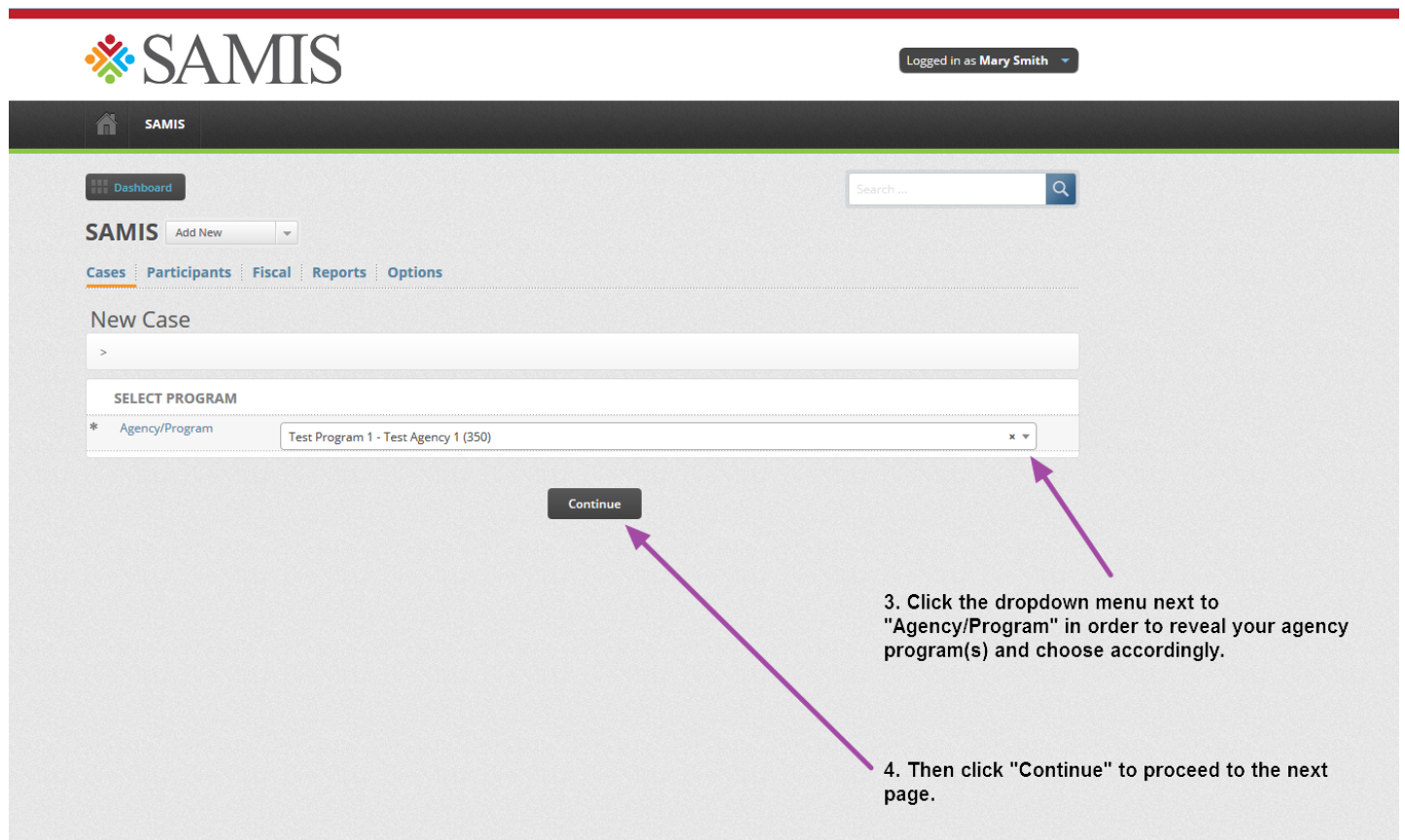
OPENING A NEW CASE –



The screenshot shows the SAMIS dashboard interface. At the top, the SAMIS logo is on the left, and a user status bar on the right indicates 'Logged in as Mary Smith'. Below the header, a navigation bar contains a home icon and the text 'SAMIS'. The main content area features a 'Dashboard' button and a 'SAMIS' label with an 'Add New' dropdown arrow. Below this, a horizontal menu includes 'Cases', 'Participants', 'Reports', and 'Options'. A '+ New Case' button is highlighted under the 'Cases' tab. A yellow warning banner at the bottom states 'You don't have access to this resource'. Two purple arrows point to the 'Add New' dropdown and the '+ New Case' button, corresponding to the numbered instructions.

1. Once you successfully log into SAMIS, click on the "Add New" dropdown arrow in order to reveal your menu options.

2. Click on "+ New Case" to proceed to the next page



The screenshot shows the 'New Case' form in the SAMIS system. The header includes the SAMIS logo and a user status bar 'Logged in as Mary Smith'. The navigation bar shows 'SAMIS' and a search bar. The main content area has tabs for 'Cases', 'Participants', 'Fiscal', 'Reports', and 'Options'. The 'New Case' form is displayed, featuring a 'SELECT PROGRAM' dropdown menu. The dropdown menu is open, showing a list of programs, with 'Test Program 1 - Test Agency 1 (350)' selected. A 'Continue' button is located below the dropdown menu. Two purple arrows point to the dropdown menu and the 'Continue' button, corresponding to the numbered instructions.

3. Click the dropdown menu next to "Agency/Program" in order to reveal your agency program(s) and choose accordingly.

4. Then click "Continue" to proceed to the next page.

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.

The screenshot shows the SAMIS web application interface. At the top, the SAMIS logo is on the left, and a user login bar on the right says 'Logged in as Stessy Cocerez'. Below the logo is a navigation bar with links: SAMIS, Forms, Reports, and Support. A 'Dashboard' button is on the left, and a search bar is on the right. The main content area has a breadcrumb trail: 'Test Agency 1 > Test Program 1'. Below this is a 'New Case' section. A purple box highlights the 'CASE INFORMATION' form fields, which include: 'Agency Case Code' (text input), '* Number In Household' (text input), '* Adults In Household' (text input), '* Children In Household' (text input), '* Number in Household who served in US Armed Forces' (text input), '* Household Income' (dropdown menu), and '* Household Arrangement' (dropdown menu). An annotation with an arrow points to the asterisk on the 'Adults In Household' field, stating: '5. Fill out as much information as you can. Please note that any field with an asterisk (*) is required.' Below the form is a 'Detail Page' dropdown and 'Save' and 'Cancel' buttons. An annotation with an arrow points to the 'Save' button, stating: '6. Click Save to proceed to next page.'

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

6. Click Save to proceed to next page.

OPENING A NEW CASE (CONT.) –



Logged in as **Stessy Cocerez**

SAMISFormsReportsSupport

Dashboard

Search ...

SAMIS Add New

AgenciesPrograms**Cases**ParticipantsFiscalPositionsReportsAdminOptions

ModifyNew Participant

10518:

Case Code: **10518**Agency Case Code:Participants: **0**

Test Agency 1 > Test Program 1 > 10518:

CASE INFORMATION

Agency Case Code	Number In Household	1
Adults In Household	Children In Household	0
Number in Household who served in US Armed Forces	Household Income	\$50,000 - \$74,999
Household Arrangement	Independent Living	Referred From

PARTICIPANTS - ITEMS

+ Add Filter

Page 1 of NaNRecords per page: 100

Drag a column here to group by that column

Participant Id	CSC Case Code	Last Name	Soc Sec Num	Date Of Birth
No rows to display.				

7. Your client's case has now been opened. Click on "New Participant" to add your client to the case and to insert additional information about your client.

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

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

9. Click "Continue" to proceed to the next page.

SAMIS Logged in as Stessy Cocerez

SAMIS Add New

Agencies **Programs** **Cases** **Participants** **Fiscal** **Positions** **Reports** **Admin** **Options**

New Participant

Test Agency 1 > Test Program 1 > 10518: > New Participant

PARTICIPANT CODE INFORMATION

Confidential Information. Encryption to be applied.

* Last Name

* First Name

Middle Name

* Date of Birth

* Open Date

* Gender

* Involvement

Continue

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.) –


Logged in as Stessy Cocerez

Home SAMIS Forms Reports Support

Dashboard

Search ...

SAMIS Add New

[Agencies](#) | [Programs](#) | [Cases](#) | [Participants](#) | [Fiscal](#) | [Positions](#) | [Reports](#) | [Admin](#) | [Options](#)

New Participant

Test Agency 1 > Test Program 1 > 10518: > New Participant

First Name	Just	Middle Name	
Last Name	Test	* Social Security No	
TANF	Select One	Program Site	Select One
Employment Status	Select One	Teen Parent	No
Foster Child	Select One	Special Needs	Select One
Misc. 1		Misc. 2	
Birth Country	Select One	Cultural Influence	Select One
Language at Home	Select One	Veteran	Select One

Street No	Fraction
Pre Direction	Street Name
Street Suffix	Street Direction
Apt/ Bldg/ Unit	Unit #
Address 2	
Zip Ext	* Zip Code
* City	Select One

Ethnicity	Current Grade
English Proficient	Health Insurance
Highest Grade	Parent Name
Email Address	Phone Number
Military Family	Migrant Family
Dependency System	Delinquency System
* Involvement	* Race

REASON FOR PARTICIPATION

* Primary	Secondary
	Type To Filter

ACTIVITY SERVICES

* Primary	Secondary
	Type To Filter

☐ Abuse/Assault- Perpetrator, Sexual Abuse
☐ Assault - Victim
☐ Advocacy
☐ Basic Needs Assistance
☐ Behavior Management
☐ Budget Counseling
☐ Case Management
☐ Counseling (all forms)
☐ Crisis Intervention
☐ Economic Self Sufficiency Activities
☐ Family Support Services

Referred To

After Saving, Go To

Detail Page

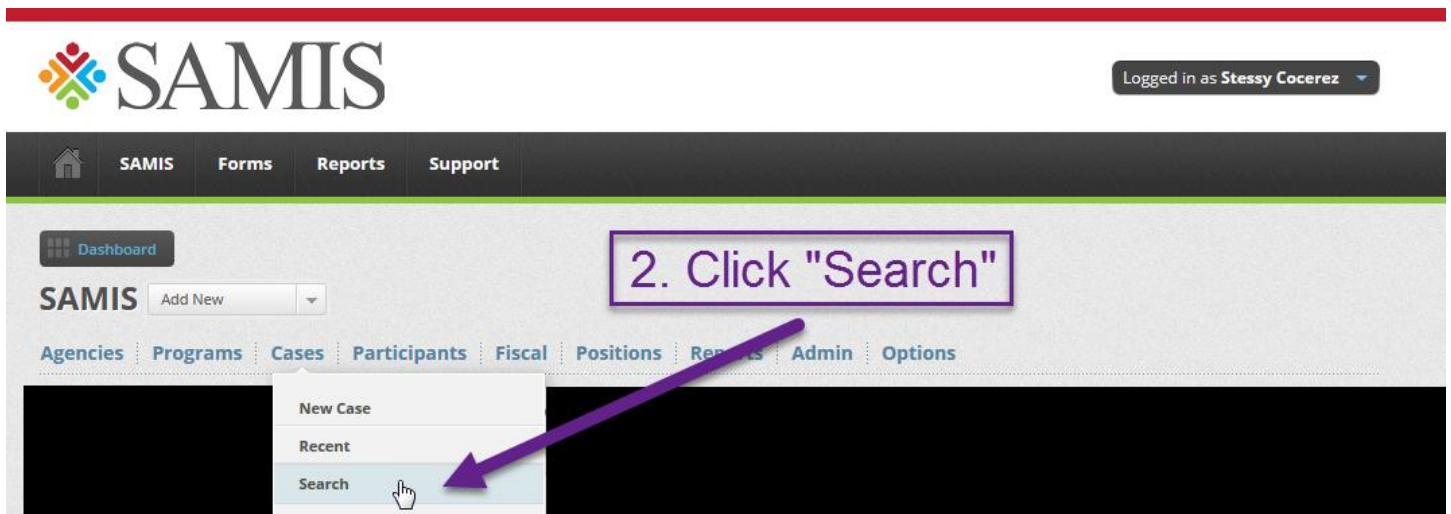
Save Cancel

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.

SEARCH FOR CLIENT CASES –

- 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.) –

The screenshot shows the SAMIS web application interface. At the top, the SAMIS logo is on the left, and a user login bar on the right says "Logged in as Stessy Cocerez". Below the logo is a navigation bar with links: Home, SAMIS, Forms, Reports, Support. A "Dashboard" button is on the left. A search bar is on the right. Below the navigation bar, there are tabs: Agencies, Programs, Cases, Participants, Fiscal, Positions, Reports, Admin, Options. The "Cases" tab is selected. A purple box with an arrow points to the "+ Add Filter" button. Another purple box with an arrow points to the "Program Name" option in the dropdown menu. A third purple box with an arrow points to the "Program Name" option in the dropdown menu.

3. Click "Add Filter" to reveal dropdown and select "Program Name"

Case Code	Open Date	Original Case Code	Participants	Title	
Home	10956	10/19/2016	1839	1	10956: 10-19-2016 -
revention P...	10954	10/17/2016		1	10954: 10-17-201...
ications Se...	10953	10/15/2016		1	10953: 10-15-201...
ications Se...	10952	10/15/2016		1	10952: 10-15-201

The screenshot shows the SAMIS web application interface. At the top, the SAMIS logo is on the left, and a user login bar on the right says "Logged in as Stessy Cocerez". Below the logo is a navigation bar with links: Home, SAMIS, Forms, Reports, Support. A "Dashboard" button is on the left. A search bar is on the right. Below the navigation bar, there are tabs: Agencies, Programs, Cases, Participants, Fiscal, Positions, Reports, Admin, Options. The "Cases" tab is selected. A purple box with an arrow points to the "Program Name" option in the dropdown menu. Another purple box with an arrow points to the "Contains" option in the dropdown menu. A third purple box with an arrow points to the "Settings" button. A fourth purple box with an arrow points to the "Settings" button. A pink box with an arrow points to the "Settings" button. A pink box with an arrow points to the "Settings" button.

4. Make sure the text between 'Program Name' and the typing area reads "Contains"; to change this, click on whatever the current verbiage is and select "Contains". Then enter the first three letters of your program.

5. Press enter on your keyboard to search. You should be given a list of all the cases in your program.

*TIP: Press "Settings" to specify the columns (aka. fields) that you would like to see in the search results.

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.

The screenshot shows the SAMIS web application interface. At the top, there is a navigation bar with links for Home, SAMIS, Forms, Reports, and Support. Below this is a search bar and a dropdown menu for "Add New". The main content area displays the "Participant Detail" page for a client named "Just Test". The client's information is shown in a table with fields for Case Code (10518), DOB (10/21/1991 - 25), Sex (F), Race (White or Caucasian), Participant ID (10526), and Open Date (10/1/2016). Below this, there is a section for "Test Agency 1 > Test Program 1 > 10518: > Just Test". The client's details are listed in a table with fields for First Name, Middle Name, Last Name, Social Security No, TANF, Program Site, Employment Status, Teen Parent, Foster Child, Special Needs, Misc. 1, Misc. 2, Birth Country, Cultural Influence, Language at Home, Veteran, Street No, Fraction, Pre Direction, Street Name, Street Suffix, Street Direction, Apt/ Bldg/ Unit, and Unit #. To the right of the client details is a section for "EPISODES" with a table showing the dates and reasons for episodes. A map is also visible on the right side of the page.

1. Once you have arrived at the Participant Detail page for the desired client, click on the gray row within the "Episodes" box.

The screenshot shows the "Client Episode" popup window. The window has a title bar that says "Client Episode". Inside the window, there is a section for "EPISODE" with fields for Open Date (10/1/2016), Close Date, and Closing Reason. A "Save" button is located at the bottom right of the window. The background of the screenshot shows the same Participant Detail page as the previous image, but it is dimmed.

2. A popup should appear with the title "Client Episode". Enter the case close date and closing reason.

3. Click "Save" to continue with the PM section.

ENTERING A PERFORMANCE MEASUREMENT (PM) –

The screenshot shows the SAMIS web application interface. At the top, the SAMIS logo is on the left, and a user login bar on the right says 'Logged in as Stessy Cocerez'. Below the logo is a navigation bar with links: Home, SAMIS, Forms, Reports, and Support. A 'Dashboard' button is on the left, and a search bar is on the right. The main content area has a 'SAMIS' header with an 'Add New' dropdown. Below this is a horizontal menu with tabs: Agencies, Programs, Cases, Participants, Fiscal, Positions, Reports, Admin, and Options. Under the 'Participants' tab, there are buttons: Modify, Modify Name/Regenerate Client Code, New Episode, Performance Measures (highlighted with a purple arrow), Add New Participant to Same Case, and Directions. Below these buttons is a 'Just Test' section with a summary bar showing Case Code: 10518, DOB: 10/21/1991 - 25, Sex: F, Race: White or Caucasian, Participant ID: 10526, and Open Date: 10/1/2016. Below the summary bar is a breadcrumb trail: Test Agency 1 > Test Program 1 > 10518: > Just Test. The main content area is divided into two columns. The left column contains a form with fields for Personal Information (First Name, Last Name, Social Security No, TANF, Employment Status, Foster Child, Misc. 1, Birth Country, Language at Home, Street No, Pre Direction, Street Suffix, Apt/ Bldg/ Unit, Address 2) and Middle Name, Social Security No, Program Site, Teen Parent, Special Needs, Misc. 2, Cultural Influence, and Veteran. The right column contains an 'EPISODES' table with columns 'Dates' and 'Reason'. The table has one row: 10/1/2016 - 10/21/2016, Successfully Completed Program. Below the table is a map showing the location of 'Chunio Mania' and 'Capscare A Health Care'.

4. The screen should reflect your case episode dates (aka. open / close dates) in the "Episodes" box. From here, you will click on "Performance Measures" to proceed to the next page.

The screenshot shows the SAMIS web application interface. At the top, the SAMIS logo is on the left, and a user login bar on the right says 'Logged in as Stessy Cocerez'. Below the logo is a navigation bar with links: Home, SAMIS, Forms, Reports, and Support. A 'Dashboard' button is on the left, and a search bar is on the right. The main content area has a 'SAMIS' header with an 'Add New' dropdown. Below this is a horizontal menu with tabs: Agencies, Programs, Cases, Participants, Fiscal, Positions, Reports, Admin, and Options. Under the 'Participants' tab, there are buttons: Details, Modify, Participant Info, New Service Component (highlighted with a purple arrow), and Show Expired Service Components. Below these buttons is a 'Just Test' section with a summary bar showing Case Code: 10518, DOB: 10/21/1991 - 25, Sex: F, Race: White or Caucasian, Participant ID: 10526, and Open Date: 10/1/2016. Below the summary bar is a breadcrumb trail: Test Agency 1 > Test Program 1 > 10518: > Just Test.

5. Click on "New Service Component" to continue to the next page.

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)

6. A popup should appear with the title "Add/Modify Service Component" and within it, the box title should say "Service Component". Enter the start date (aka. case open date) and the end date (aka. case close date).

7. Click "Save Service Component" to continue with the PM entry.

7. Click "Save Service Component" to continue with the PM entry.



Logged in as **Stessy Cocerez**

SAMIS Forms Reports Support

Dashboard Search ...

SAMIS Add New

Agencies Programs Cases Participants Fiscal Positions Reports Admin Options

Details Modify Participant Info New Service Component Show Expired Service Components

Just Test

Case Code: 10518 DOB: 10/21/1991 - 25 Sex: F Race: White or Caucasian Participant ID: 10526 Open Date: 10/1/2016

Test Agency 1 > Test Program 1 > 10518: > Just Test

(673): 10/1/2016 - 10/21/2016

Program Outcome

Program Measure

Outcome statement will be visible here.

Admin Point	Upon Exit (2273)
Date	
Outcome question will be asked here	

8. Click on the pencil image to continue to the next page.

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.

SAMIS Add New

Agencies | Programs | Cases | **Participants** | Fiscal | Positions | Reports | Admin | Options

Details | Modify | Participant Info | New Service Component | Show Expired Service Components

Just Test

Case Code: 10963 | DOB: 10/21/1991 - 25 | Sex: F | Race: White or Caucasian | Participant ID: 10953 | Open Date: 10/1/2016

Test Agency 1 > Test Program 1 > 10518: > Just Test

(673): 10/1/2016 - 10/21/2016

Program Outcome | Program Measure

Outcome statement will be visible here.

ADMIN POINT

Admin Point | Upon Exit

* Date | [Calendar Icon]

Uncollected Reason | Select One

QUESTIONS

* Outcome question will be asked here. | Select One


Save Admin Point | Cancel

9. Select the outcome assessment date. If you can respond to the outcome question with a "YES" or "NO", skip to step 11. If not, please proceed to step 10.

10. IF you cannot answer the outcome question and the client was unable to be measured within the allotted time period, please select an appropriate "Uncollected Reason" and click "Save Admin Point".

11. IF you can answer the outcome question and the client was able to be measured within the allotted time period, please select an appropriate "YES" or "NO" and click "Save Admin Point".

ENTERING A PM (CONT.) –



Logged in as **Stessy Cocerez**

[Home](#)[SAMIS](#)[Forms](#)[Reports](#)[Support](#)

Dashboard

Search ...

SAMIS

Add New

Agencies

Programs

Cases

Participants

Fiscal

Positions

Reports

Admin

Options

Details

Modify

Participant Info

New Service Component

Show Expired Service Components

Just Test

Case Code: 10963

DOB: 10/21/1991 - 25

Sex: F

Race: White or Caucasian

Participant ID: 10953

Open Date: 10/1/2016

Test Agency 1 > Test Program 1 > 10518: > Just Test

✖

(673): 10/1/2016 - 10/21/2016

Program Outcome

Program Measure

Outcome statement will be visible here.

Admin Point	✎ Upon Exit (2273)
Date	10/21/2016
Outcome question will be asked here.	Yes

12. This should be your resulting screen. Once you've arrived to this screen, you have completed closing out your client's case and entered your client's performance measure / outcome.