



Core SAMS Training Manual for District Users

Version 3 Document

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Unit 1: Orientation to SAMS

Unit Overview

The State Aid Management System (SAMS) is a secure information system that facilitates the collection and processing of data required by the New York State Education Department (NYSED) to distribute annual state aid to all New York school districts. SAMS is accessible to authorized users from each school district, staff from the State Aid unit of the Education Department, and other authorized users from various state agencies.

In this unit, you will learn how to log in and out of SAMS. An overview of the header and menu options will also be provided in this unit.

Logging In and Out of SAMS

Overview

SAMS is an Internet-based application allowing users to enter and retrieve information from any computer with an Internet connection and Internet Explorer 6.0 or greater. SAMS users login to the application through the NYSED's Application Portal and Single Sign-On (SSO) facilities.

The Application Portal is the entry point into all NYSED Internet applications. All NYSED applications you are authorized to access are accessible from this page. Some applications, such as SAMS, require user name and password authentication. NYSED's Single Sign-On service, accessible from the Portal page, prompts you for your user name and password and then decides which applications, like SAMS, you are authorized to use.

Logging in

Establish an internet connection in order to run the SAMS application:

1. You access SAMS through the New York State Education Department Application Portal at <http://portal.nysed.gov>.



The screenshot shows the New York State Education Department Application Portal. The header includes the text "New York State Education Department Application Portal" and "Your One Stop for All NYSED Internet Applications". A navigation bar contains links for "Home", "NYSED", "Contact Us", "FAQ's", "Our Mission", "Change Password", and "Log On". A search bar is located below the navigation bar. The main content area is divided into three sections: "Public Interest" with a list of links, "Other Applications" with a list of links, and a "Welcome" message. A "Privacy Policy" link is visible in the bottom right corner.

New York State Education Department
Application Portal

Your One Stop for All NYSED Internet Applications

Home NYSED Contact Us FAQ's Our Mission Change Password Log On

Search

Welcome

Public Interest

For more information on our applications visit our [Online Services](#) page.

- [Approved Preschool Special Education Programs Site Search](#)
- [Inventory of Registered Programs](#)
- [Look Up Postal Zip Codes](#)
- [NYSED Public web site](#)
- [Professional License Online Verification Searches](#)
- [SEDREF Query](#)
- [Teacher Certification Help](#)
- [Teacher Certification Online Records](#)

Other Applications

You may be required to sign in to access these applications

- [Child Nutrition Knowledge Center \(CN\)](#)
- [Impartial Hearing Reporting System \(IHRS\)](#)
- [Libertyweb System](#)
- [Long Term Sheltered Employment \(LTSE\)](#)
- [NYS Student Identification System \(NYSSIS\)](#)
- [Rate Setting Unit \(RSU\)](#)
- [System to Track and Account for Children \(STAC\)](#)
- [Teacher's Certification \(TEACH\)](#)
- [VESID PD System Login](#)

[Privacy Policy](#)

2. After the Portal page appears, click on the 'Log On' menu option in the upper right hand side of the page.
3. The **Single Single-On** dialog box appears.

Sign In

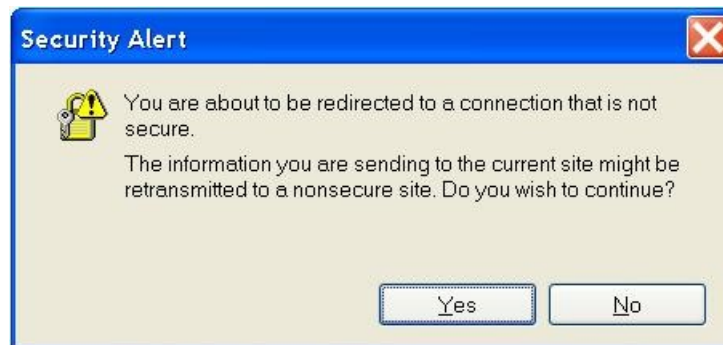
Enter your Single Sign-On user name and password to sign in

User Name

Password

Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution.

4. You are prompted to enter a valid **User Name** and **Password** in the two text boxes provided. Both the **User Name** and **Password** should have been previously setup for you. If this has not occurred please contact NYSED.
5. After you enter your **User Name** and **Password**, press the **Login** button on the upper right hand side of the page. You will receive a Security Alert:. Press the 'Yes' button on the Security Alert to continue. You will then be directed back to the to the NYSED Portal.



6. Find the '**My Applications**' tab on the page and click on the 'State Aid Management System (SAMS)' hyperlink. The SAMS Homepage will appear.

Important Information: If you enter an invalid **User Name** or **Password**, Single Sign-On will return the following error message- 'Error: Authentication failed. Please try again.' If you forgot your **User Name** or **Password**, you must contact the SAMS Help Desk.

Notes:

- Your **User Name** is tied to a system role. Your system role determines what you can and cannot do on the system, including which districts you have access to. Users that are associated with a single district will only have access to their district's data. A system role is assigned to you at the same time your User Name and Password are registered in the Single Sign-On directory.
- If for some reason, your **User Name** and **Password** are not associated with the SAMS application, you will not find SAMS in the 'My Applications' tab of the Portal Page.
- If you want to change your password to SAMS and any other NYSED applications you are authorized to access from the NYSED Portal, select the 'Change Password' menu option on the upper right hand side of the Portal page.

Logging out

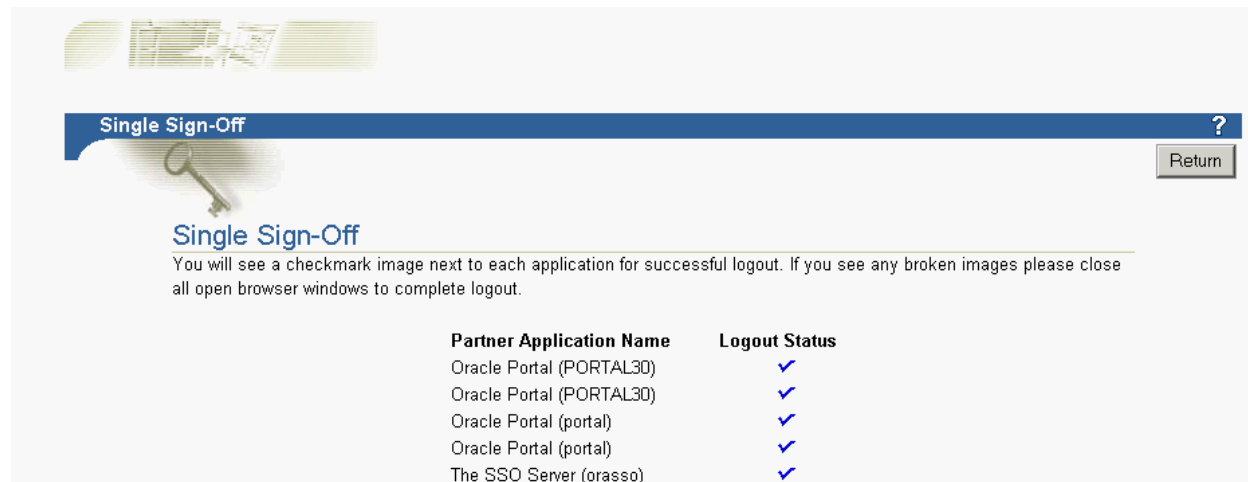
1. Click on **Logout** from the SAMS menu bar. You will find it located on the upper right side of any SAMS page.



The screenshot shows the SAMS (New York State Education Department State Aid Management System) user interface. At the top, there is a header with the SAMS logo and the text 'NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM'. Below the header, there is a user profile section with the following information: Name: ONEIDA CITY SD, BEDS Code: 251400, Claim Year: 2006-2007, and a 'SET VALUES' button. To the right of the profile section, there is a navigation menu with links for 'Home', 'Issue Reporting', 'Help', and 'Logout'. Below the navigation menu, there is a footer with links for 'Entity Info', 'Forms', and 'Activity Log'.

Important Information: If you click on **Logout** when you are on a SAMS form and have entered data into the form without saving, SAMS will warn you that you are about to exit the application and will provide you with an option to save your data.

2. After clicking on **Logout**, you will receive a Security Information screen. Click either 'Yes' or 'No' on the Security Information screen to continue. You will then be directed to the Single Sign-Off page. You can sign back on to the application by clicking on the **Return** button. This will redirect you back to the NYSED Portal Application.



The screenshot shows the 'Single Sign-Off' page. At the top, there is a blue header with the text 'Single Sign-Off' and a question mark icon. Below the header, there is a 'Return' button. The main content area contains the following text: 'Single Sign-Off' and 'You will see a checkmark image next to each application for successful logout. If you see any broken images please close all open browser windows to complete logout.' Below this text, there is a table with two columns: 'Partner Application Name' and 'Logout Status'.

Partner Application Name	Logout Status
Oracle Portal (PORTAL30)	✓
Oracle Portal (PORTAL30)	✓
Oracle Portal (portal)	✓
Oracle Portal (portal)	✓
The SSO Server (orasso)	✓

Session Timeout

SAMS is an online, Web-based application. When you log on to SAMS, the system establishes a 'session id' for your visit and each time you go through the log on process you are assigned a unique 'session id'.

New York State information security standards mandate that all online applications have a session timeout set. For the SAMS application, the established **session timeout is three (3) hours**. This means that if you log on to the SAMS application and there is no activity detected by the application in any consecutive three-hour period, your session will be terminated. If session termination occurs, any work you've done on the system during the past three-hours could be lost.

It is important to understand that SAMS can only detect activity when you exchange information with the Web server. Therefore, if you are working in a SAMS form, enter some data, and walk away from the application for three hours, your data entry work will be lost if you did not save before the session timeout occurred.

Important Information: When working in forms and entering your data, save often by clicking the **Save** button or using the **ALT-S** hot key.

It is never a good security practice to leave an application open and unattended for long periods of time.

Summary

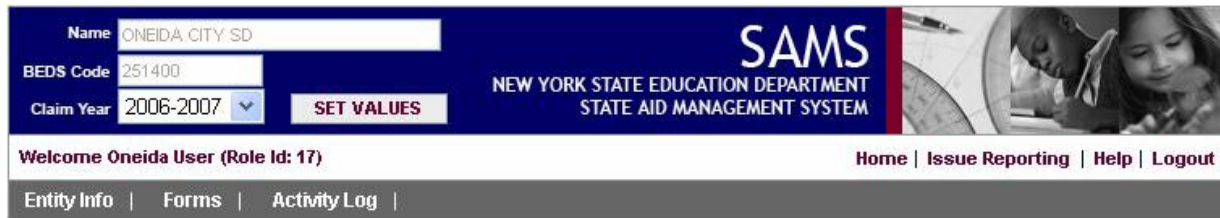
SAMS Login and Logout are simple processes to follow. To Login to SAMS, the user must have a valid User Name and Password that has been previously registered with the Single Sign-On directory. For security reasons, you should remember to always logout of SAMS if you are leaving the area of your computer for an extended period of time.

If any problems are encountered during the login process, please call the SAMS Helpdesk for assistance.

Overview of Header and Menu Bar Options

Overview

SAMS has a single header and menu bar that is accessible from any SAMS page. The header and menu bar are accessible from any location in the application. Users may move through any function in the application regardless of where they are working and quickly navigate to other areas of the application.



The screenshot displays the SAMS application header and menu bar. The header is a dark blue bar with white text. On the left, there are three input fields: 'Name' with the value 'ONEIDA CITY SD', 'BEDS Code' with the value '251400', and 'Claim Year' with a dropdown menu showing '2006-2007' and a 'SET VALUES' button. To the right of these fields is the SAMS logo and the text 'NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM'. On the far right of the header is a small image of two children. Below the header is a white bar with the text 'Welcome Oneida User (Role Id: 17)' on the left and navigation links 'Home | Issue Reporting | Help | Logout' on the right. At the bottom is a dark grey bar with the text 'Entity Info | Forms | Activity Log |'.

Header Description

The SAMS header is used to view and set the district context. The SAMS header includes fields for a district **Name**, **BEDS Code**, and a **Claim Year**. For users who have a role that assigns them to just one district, both the district **Name** and **BEDS Code** fields are read-only. Just the **Claim Year** can be selected and changed for these users. For users that have access to multiple districts, the **Name**, **BEDS Code**, and **Claim Year** fields can be accessed and changed. Whenever a change is made to header information in these fields the user must click on the **Set Values** button to invoke the change.

Menu Bar Options

Entity Info

This menu bar option provides access to data stored in another NYSED information system called SEDREF. This system contains extensive demographic information about institutions that interact with NYSED. The Entity Info page in SAMS displays SEDREF information associated with the current district set in the SAMS header. Information includes basic district attributes, such as district code, BOCES code, District Type, District Superintendent, RIC Code, and BOCES Comp. Key contacts associated with the district are also listed and authorized users can edit the information for these SAMS contacts.

Claim Verifications

This menu bar option provides access to all screens related to the Claim Verification process.

Forms

This menu bar option provides access to all State Aid data collection forms. To support the form selection process a **Form Tree** is provided that divides forms into form sets. Each form set is a sub-folder on the Form Tree and all forms associated with a form set are associated with the folder. The **Forms** menu option has the following sub-menus: **Official Data**, **Revision Data**, **Import Form Data**, and **Print Multiple Forms**.

Both the **Official Data** and **Revision Data** options represent data areas in SAMS. The **Official Data** area always holds the official data as it exists in the system. The **Revision Data** area holds updates or edits to the official data area when a district needs to revise their official submittal. A user utilizes the Form Tree to find, select, and load a form for data entry or review.

The **Import Form Data** sub-menu option allows a district to bypass the manual form data entry process and electronically load data into SAMS from a file import process. This file import process utilizes the same data validation process as if the data were being entered onto the forms manually.

The **Print Multiple Forms** sub-menu option allows a district to print more than one form at the same time. A Form Tree is presented to the user with check-boxes next to the name of each form set and form which allow the user to choose the forms they would like to print. The user also has the option of choosing the data area they want to print their forms from or to print blank forms. After a user selects their forms and printing options, they can click on the **'Print Selected Forms'** hyperlink to print the forms. The selected forms will appear in a separate browser window from which the user can preview and print them.

Activity Log

This menu bar option provides access to the SAMS **Activity Log**. The Activity Log captures all status changes of all form sets for a given district. Users can review the Activity Log to see when key milestone events occurred related to a given form set. For example, the Activity Log can be used to see when a given form set was Certified. The Activity Log also tracks notification events, which are typically automatic emails sent by SAMS when a certain event trigger occurs. Users with the appropriate security privilege can also use the Activity Log to enter their own correspondence activities.

Home

This menu bar item brings you back to the SAMS home page.

Issue Reporting

This menu bar item launches the users default email application and pre-populates an email to the SAMS Helpdesk with a standard template for reporting issues.

Help

The SAMS Online Help module for the application provides information on all features.

Logout

This option is used to exit the SAMS application. Once selected, you will be directed to the Single Sign-Off page. See the Logging out section for important details on logging off correctly.

Summary

The SAMS header and menu bar is available from all pages within the application. The content of the menu bar is determined by a user's security access role. All users will not see the same options on the menu bar. If there are functions available and you do not have access to them but believe you should have access, please contact the SAMS Help Desk.

Unit 2: Working with Forms- Part I

Unit Overview

Working with forms is a major activity in SAMS for all district users. Forms are used to collect and display all pertinent district information related to State Aid. SAMS is designed to hold multiple claim years of State Aid and, therefore, supports a library of forms for each claim year. SAMS allows you to specify a claim year of interest and then it retrieves all the forms associated with that claim year and any data related to your district.

In this unit, you will learn how to select a form, fill out and save a form, print a form, and use the file import mechanism to load form data from a file rather than via manual input.

Opening a Form

To open a SAMS Form follow these steps:

1. Make sure you set the form access context. To do this, notice the current settings on the SAMS header. The district **Name** should be set to your district, as should be the **BEDS Code**. Both of these settings are read-only for district users. The Claim Year, by default, should be set to the current claim year when you first logon. This setting can be changed by you to the desired claim year. This is the only setting district users can change in the header. For this example, change the claim year to '2003-2004' and click on the **Set Values** button. A message will appear confirming your selection.
2. From the SAMS main menu, run your mouse over the **Forms** menu option, and click on the **Official Data** sub-menu option (in the next unit, we'll talk about data areas).

The screenshot shows the SAMS homepage for Oneida City SD. The header contains the following information:

- Name: ONEIDA CITY SD
- BEDS Code: 251400
- Claim Year: 2006-2007 (with a dropdown arrow)
- SET VALUES button
- SAMS logo and text: NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM

The main navigation bar includes: Welcome Oneida User (Role Id: 17) and Home | Issue Reporting | Help | Logout.

The main menu is expanded to show the following options:

- Entity Info
- Forms (highlighted)
- Activity Log

The Forms menu is expanded to show the following options:

- Official Data (highlighted)
- Revision Data
- Import Form Data
- Print Multiple Forms

The main content area displays an IMPORTANT ANNOUNCEMENT:

IMPORTANT ANNOUNCEMENT:

Legacy DEA Schedule J Transportation Aid Claim Review -

[Online Response due by June 30, 2006](#)

[Click to Enter Approved Contract Numbers on the Legacy DEA Schedule J](#)

3. SAMS returns the **Form Tree** for the Official Data. Open a menu folder by clicking on the **plus sign (+)** next to the folder or on the **name** of the folder. The form selection tree expands the folder to reveal its subcomponents. The subcomponents of a menu folder include a listing of the forms and schedules contained within it. An expanded folder can be collapsed by clicking on the **minus sign (-)** next to it or on the **name** of the folder.

Name ONEIDA CITY SD

BEDS Code 251400

Claim Year 2006-2007 SET VALUES

SAMS
NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Welcome Oneida User (Role Id: 17) Home | Issue Reporting | Help | Logout

Entity Info | Forms | Activity Log |

Expand All | Collapse All

Forms

- Form A and Schedules: Clean
 - Form A (Attendance) Ready
 - Schedule A-1 Religious Holidays First Semester
 - Schedule A-2 Attendance Report First Semester Ready
 - Schedule A-3 Religious Holidays Second Semester
 - Schedule A-4 Attendance Report Second Semester Ready
 - Schedule A-5 Days of Session Matrix Ready
 - Schedule A-6 Decimal Days of Actual Session Worksheet
 - Schedule A-7 Enrollment - Central High School Districts Only
 - Schedule B - Dual Enrollment
 - Schedule C - Urban-Suburban Transfer
 - Schedule E - Tuition Adjustment
 - Schedule P - Additional Data for Calculations
 - Schedule U1 - Charter School Enrollment and FTE
 - Form A Edit Report Clean
 - Form A Certification Saved
- Form FB : Building And Misc.: Clean

4. The **status** of each of the data collection forms and schedules within the opened folder is displayed next to their name on the form selection tree (e.g. 'Saved'). Forms and schedules that have not yet been saved by a user (i.e. have a Null status) will not have a status displayed next to their name, even though there may be some data pre-populated on them.
5. Click on the **name** of the form you want to open. The data collection form is displayed for the entity and claim year that have been set in the top left-hand corner of the application. To review the forms associated with a different claim year, select a year from the **Claim Year** box located in the top-left corner of the application and click the **Set Values** button.

Important Information: Always make sure you have set the appropriate claim year before accessing form data.

Entering and Saving Form Data

The following steps explain how to enter and save data into any form:

1. Place the cursor in the field that you want to enter data for. Note that **read-only fields** will appear grayed out and will not allow you to modify the data within them.

Name: ONEIDA CITY SD
BEDS Code: 251400
Claim Year: 2006-2007 SET VALUES

NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Welcome Oneida User (Role Id: 17) Home | Issue Reporting | Help | Logout

Entity Info | Forms | Activity Log |

You Have Selected the 'Official' Data Area.
The Data State of the form set is: "Clean"

Print Form | Print Blank | Print Text Only

District Name: ONEIDA CITY SD District Code: 251400
Contact Person: GREGORY RACE Telephone: (315) 363-8504

Form A: Attendance Data Entry

Form A - Pupil Data 2006-07 Claim Aid Year	2004-05 School Year from SED File	2005-06 School Year (Actual) EDP Form #10	2006-07 School Year (Projected) EDP Form #38
Part I: Regular Day School Enrollment and Attendance			
A: Enrollment			
1a. 1/2 Day K UNWYTD Enrollment	0	0	
b. Full Day K Enrollment		195	193
c. In what school year did, or will the District offer a full-day Kindergarten program to all children? (indicate the calendar year in which the school year began. For example: 2005)			1,995

2. Enter your data.
3. Press the **TAB** key to move to the next form field and continue entering data. Note that pressing **SHIFT+TAB** will move the cursor to the previous form field.
4. Press the **Save** button at the bottom of the form to save the data you have entered. Note that **ALT+S** is a shortcut keystroke that will allow you to Save your data from anywhere on the form while maintaining your current position on the form. Note also that calculated form fields, such as subtotals and totals, are re-calculated when the form is saved.

a. Grades K-6	<input type="text"/>	<input type="text"/>
b. Grades 7-12	<input type="text"/>	<input type="text"/>
<input type="button" value="Save"/>	<input type="button" value="Reset"/>	<input type="button" value="Save & Ready"/>
State Aid Homepage Contact Us		

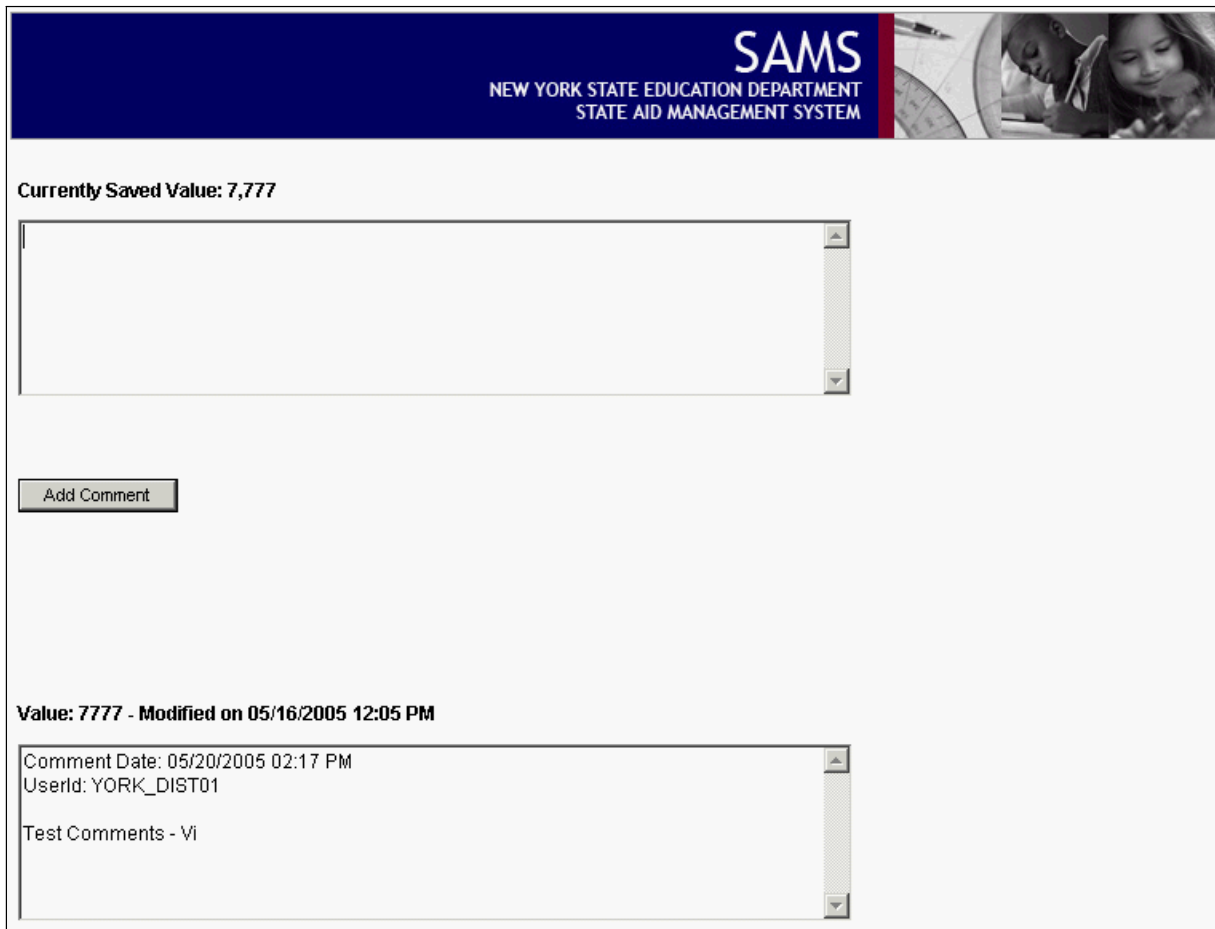
5. Press the **Reset** button at the bottom of the form if you want to cancel your unsaved changes and reset the form to its previously saved data. Note that **ALT+C** is a shortcut keystroke that will allow you to Cancel/Reset your data from anywhere on the form.
6. Press the **Save & Ready** button at the bottom of the form to save the data you have entered and simultaneously change the status of the form to 'Ready'. Note that **ALT+R** is a shortcut keystroke that will allow you to Save & Ready your data from anywhere on the form.

Important Information: In Unit 3- Working with Forms Part 2, we'll talk more extensively about the form status and the relationship with the **Save** and **Save & Ready** button.

Adding Comments to Form Fields

The following steps explain how to enter and save form data:

1. With the cursor in the field that you want to add a comment to or review the comments of, press the **F7** button. A separate window will appear that will allow you to enter a comment and view any other comments related to the current field value. Comments cannot be added to read-only fields.



SAMS
NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Currently Saved Value: 7,777

Add Comment

Value: 7777 - Modified on 05/16/2005 12:05 PM

Comment Date: 05/20/2005 02:17 PM
UserId: YORK_DIST01
Test Comments - Vi


2. Add your new comment in the designated box. Note that the history of any previously added comments for the current field, including those added by other users, will also be displayed in this window.
3. Click the **Add Comment** button and then **close the comments window** by clicking on the 'X' located in the top right-hand corner of the window or by pressing 'CTRL+W'.

4. **Save the form.** Comments are equivalent to the data that is entered into each form field and are not saved until the form has been saved. When there are saved comments associated with a field, a checkmark icon will be displayed to the right of that field. If the cursor is held over the icon with the mouse then the most recent comment for that field will be displayed.

Part I: Regular Day School Enrollment and Attendance

A: Enrollment

1a. 1/2 Day K UNWTD Enrollment

b. Full Day K Enrollment 

c. In what school year did, or will the District offer a full-day Kindergarten program to all children? (indicate the calendar year in which the school year began. For example: 2005)

Important Information: If a form is in the NULL or SAVED status, the data and comments are not being versioned (i.e. the old field values and comments are overwritten in the database when a new value or comment is entered and saved). Because the field values and comments are not being versioned during these statuses, the previous comments on a field will no longer be available when a user changes that field's value and saves the form. There may be historical comments associated with previous values for a field that can be accessed by pressing the **F7** key, but the checkmark icon is only displayed next to fields when there are comments associated with the current field value.

Printing a Form

Printing a Form with Data

The following steps explain how to print a form with data:

1. Open the form you want to print.
2. Select the **Print Form** link located in the top right corner of the form. A new window will open displaying a 'printer friendly' version of the form.

The screenshot shows the SAMS (State Aid Management System) interface. At the top, there is a header with the SAMS logo and the text "NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM". Below the header, there is a navigation bar with links for "Home", "Issue Reporting", "Help", and "Logout". The main content area displays the following information:

Welcome Oneida User (Role Id: 17)

Entity Info | Forms | Activity Log |

**You Have Selected the 'Official' Data Area.
The Data State of the form set is: "Clean"**

Print Form | Print Blank | Print Text Only

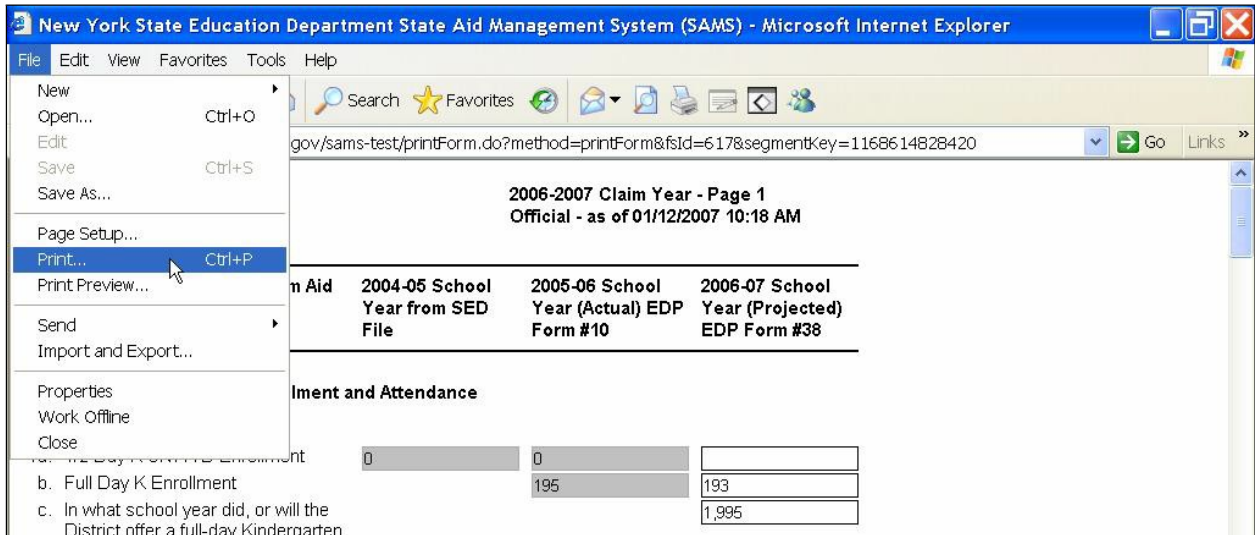
District Name: ONEIDA CITY SD
District Code: 251400
Contact Person: GREGORY RACE
Telephone: (315) 363-8504

Form A: Attendance Data Entry

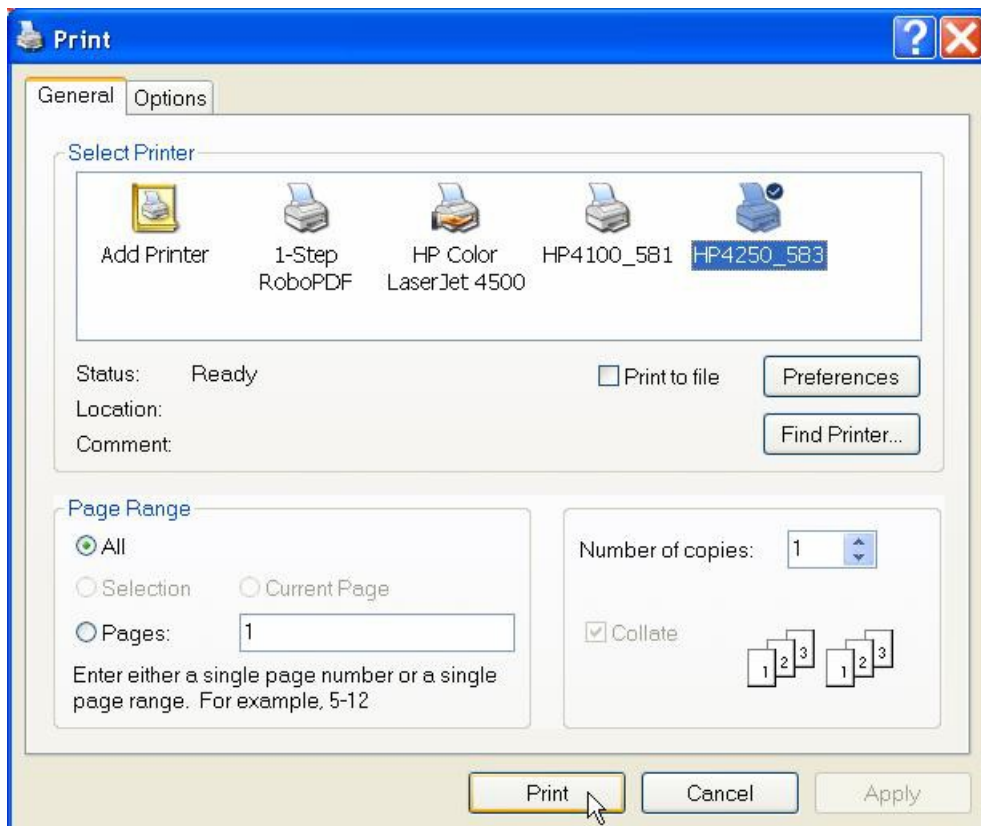
Form A - Pupil Data 2006-07 Claim Aid Year	2004-05 School Year from SED File	2005-06 School Year (Actual) EDP Form #10	2006-07 School Year (Projected) EDP Form #38
--	--------------------------------------	--	--

NOTE: The **Print Text Only** link may also be available in the top right corner of the form. This print option is similar to the **Print Form** option, except the input boxes that surround each data field are removed from the printed form.

3. From the **File** menu of the new window, click **Print**. A new print options window will open.



4. Set the printing options you want and click the **Print** button.



Important Information: SAMS will open a new browser window under a few circumstances- print forms and comments. To close these additional browser windows, you must click on the 'X' box in the upper right hand corner of the browser window or by pressing 'CTRL+W'.

Printing a Blank Form

The following steps explain how to print a blank form:

1. Open the form you want to print.
2. Select the **Print Blank** link located in the top right corner of the form. A new window will open displaying a 'printer friendly' version of the form.

The screenshot shows the SAMS (State Aid Management System) web application. At the top, there is a header with the SAMS logo and the text "NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM". Below the header, there is a navigation bar with "Welcome Oneida User" and links for "Home | Help | Logout". The main content area displays "You Have Selected the 'Official' Data Area." and "Print Form | Print Blank" links. Below this, there are input fields for "District Name: ONEIDA CITY SD", "District Code: 251400", "Contact Person: PETER TAMBURRO", and "Telephone: (315) 363-2550". A section titled "Form A: Attendance Data Entry" contains a table with the following data:

Form A - Pupil Data 2003-04 Aid Year	2001-02 School Year from SED File	2002-03 School Year (Actual) EDP Form #10	2003-04 School Year (Projected) EDP Form #38

3. From the **File** menu of the new window, click **Print**. A new print options window will open.

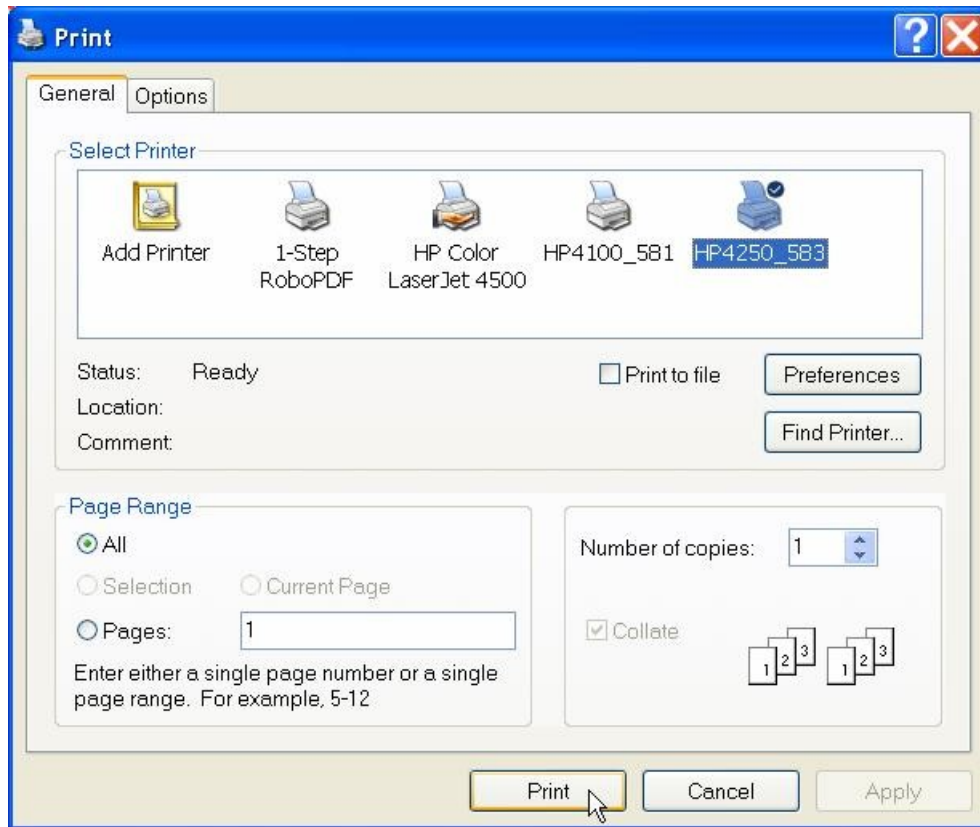
The screenshot shows a Microsoft Internet Explorer browser window displaying the SAMS application. The "File" menu is open, and the "Print..." option is selected. The browser address bar shows the URL: "gov/sams-test/printForm.do?method=printForm&fsId=6178&segmentkey=1168614828420". The main content area displays "2006-2007 Claim Year - Page 1 Official - as of 01/12/2007 10:18 AM". Below this, there is a table with the following data:

Form Aid	2004-05 School Year from SED File	2005-06 School Year (Actual) EDP Form #10	2006-07 School Year (Projected) EDP Form #38

Below the table, there is a section titled "Enrollment and Attendance" with a table showing enrollment data:

a. Full Day Kindergarten Enrollment	0	0	
b. Full Day K Enrollment		195	193
c. In what school year did, or will the District offer a full-day Kindergarten			1,995

4. Set the printing options you want and click the **Print** button.



Important Information: SAMS will open a new browser window under a few circumstances- print forms and comments. To close these additional browser windows, you must click on the 'X' box in the upper right hand corner of the browser window (or press CTRL+W).

Printing a Selected Part of a Form

The following steps explain how to print a selected part of a form:

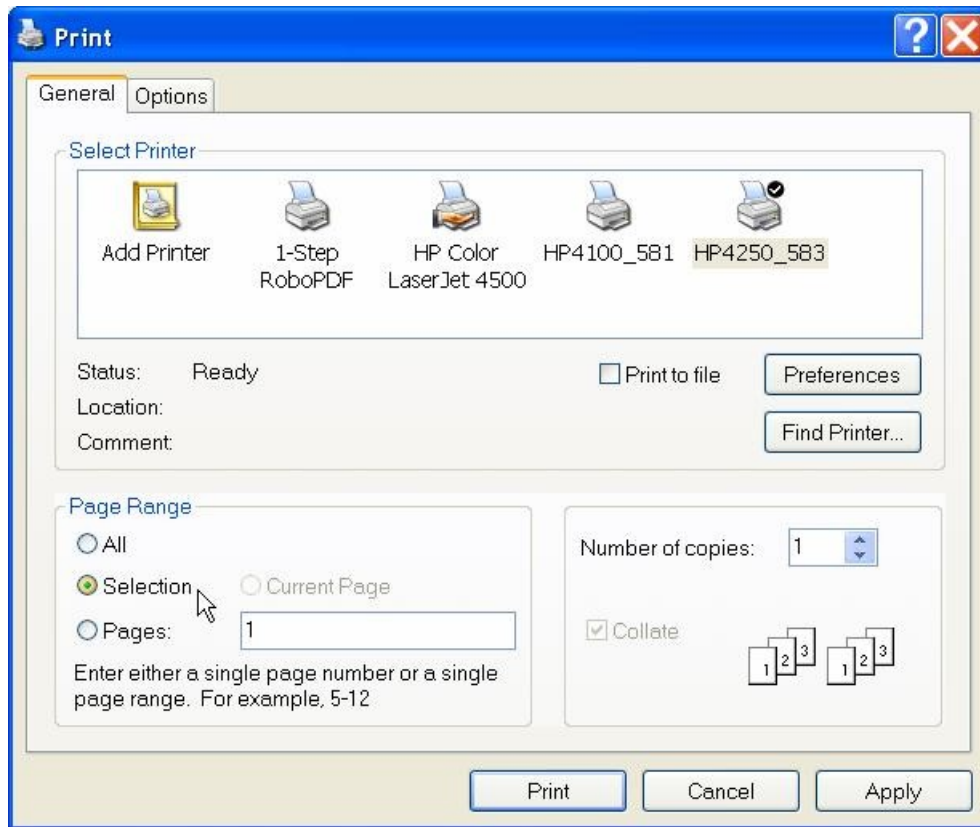
1. Open the form you want to print.
2. Select either the **Print Form** or **Print Blank** link located in the top right corner of the form, depending on whether or not you want to print the form with data. A new window will open displaying a 'printer friendly' version of the form.
3. Hold the left mouse button down and drag the cursor over the portion of the form that you want to select for printing.

The screenshot shows a web browser window with a 'Print...' dialog box open. The browser's address bar shows the URL: `.gov/sams-tref/printForm.do?method=printForm`. The form content includes:

Form A - Pupil Data 2003-04 Aid Year

	2001-02 School Year from SED File	2002-03 School Year (Actual) EDP Form #10	2003-04 School Year (Projected) EDP Form #38
Part I: Regular Day School Enrollment and Attendance			
A: Enrollment			
1 a. 1/2 Day K UNWTD Enrollment	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Full Day K Enrollment	<input type="text"/>	<input type="text"/>	<input type="text"/>
c. In what school year did, or will the District offer a full-day Kindergarten program to all children wishing to attend such Program? (indicate the calendar year in which the school year began. For example: 2003)	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. From the **File** menu of the new window, click **Print**. A new print options window will open.



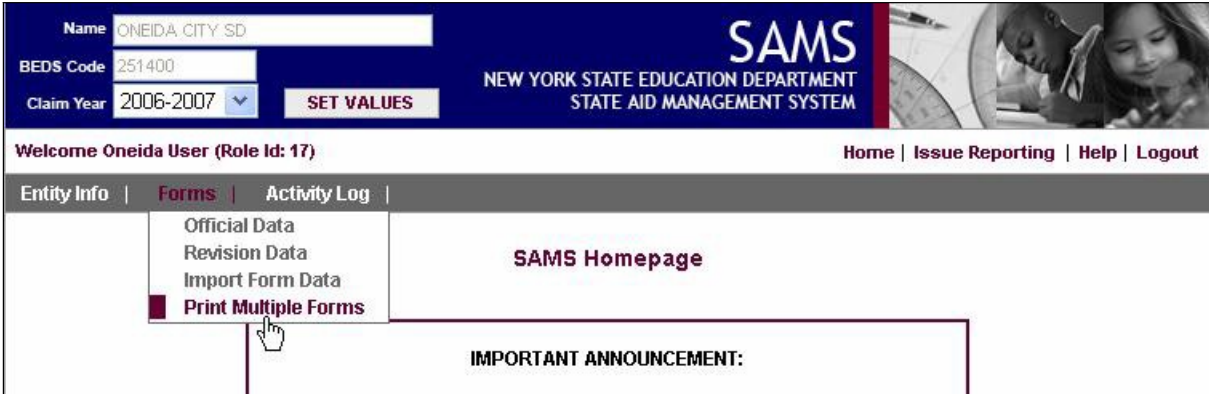
5. In the Page Range section of the General tab, choose the **Selection** option. If this option is not available or selectable, then you have not selected a portion of the form to print (see step 3).
6. Set the other printing options you want and click the **Print** button.

Important Information: SAMS will open a new browser window under a few circumstances- print forms and comments. To close these additional browser windows, you must click on the 'X' box in the upper right hand corner of the browser window (or press 'CTRL+W').

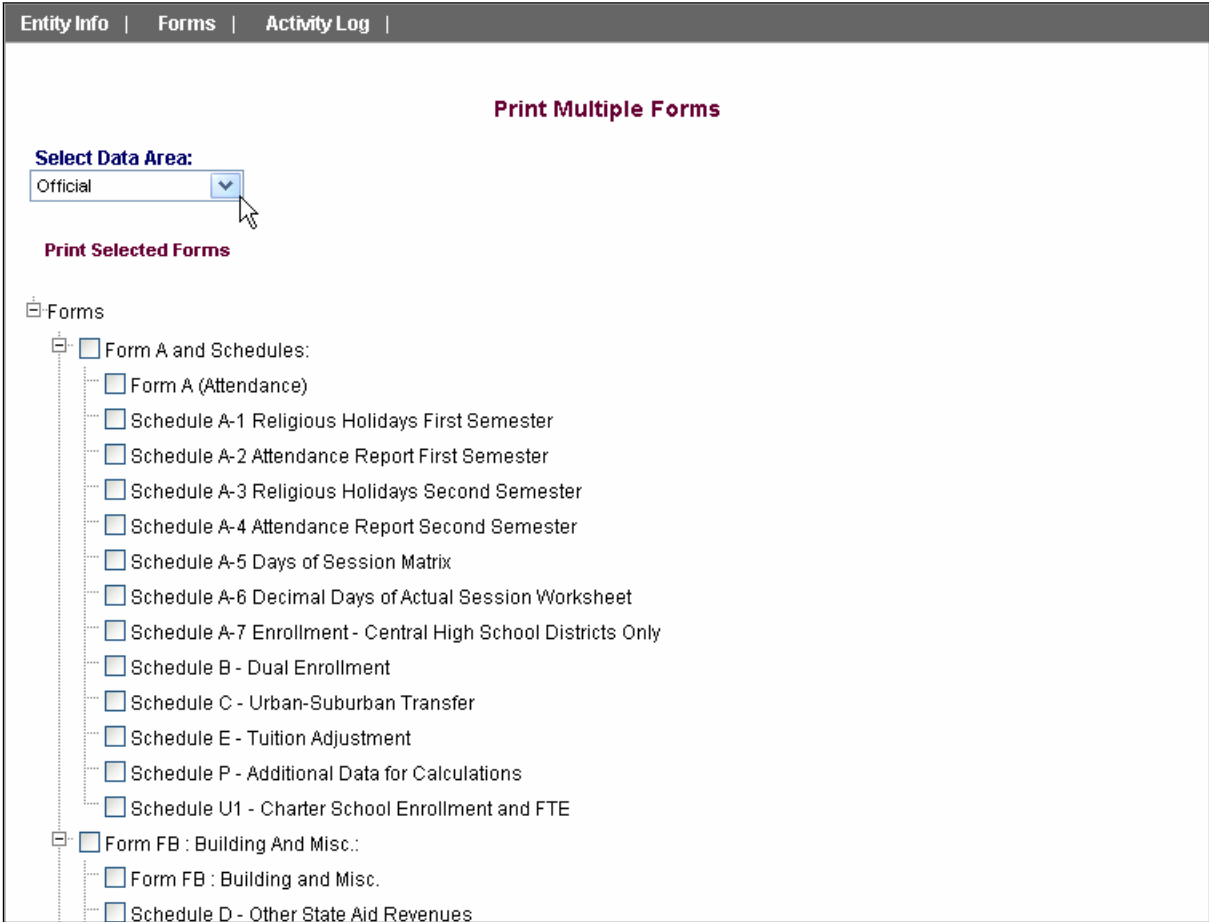
Printing Multiple Forms

The following steps explain how to print multiple forms at the same time:

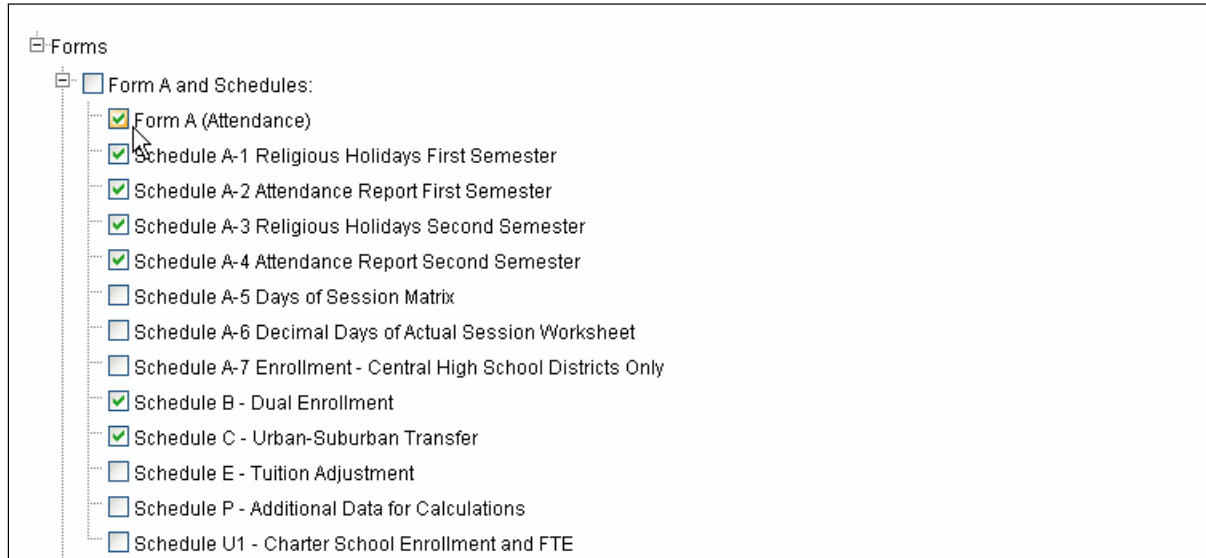
1. From the SAMS main menu, run your mouse over the **Forms** menu option, and click on the **Print Multiple Forms** sub-menu option. SAMS displays the Print Multiple Forms screen. This screen includes a Form Tree for selecting the forms you would like to print.



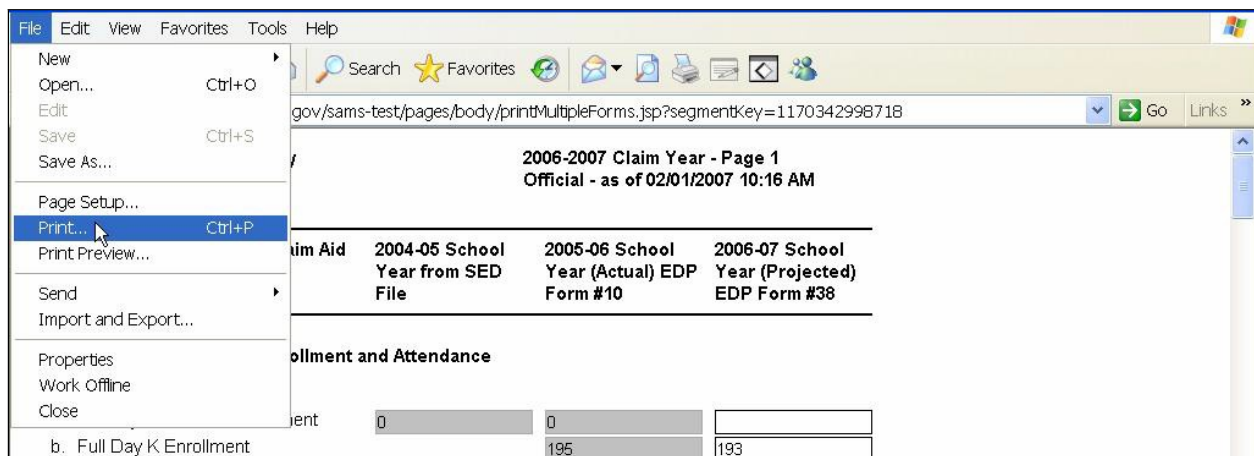
2. Select a Data Area, or other print option, from the **Select Data Area** drop-down box.



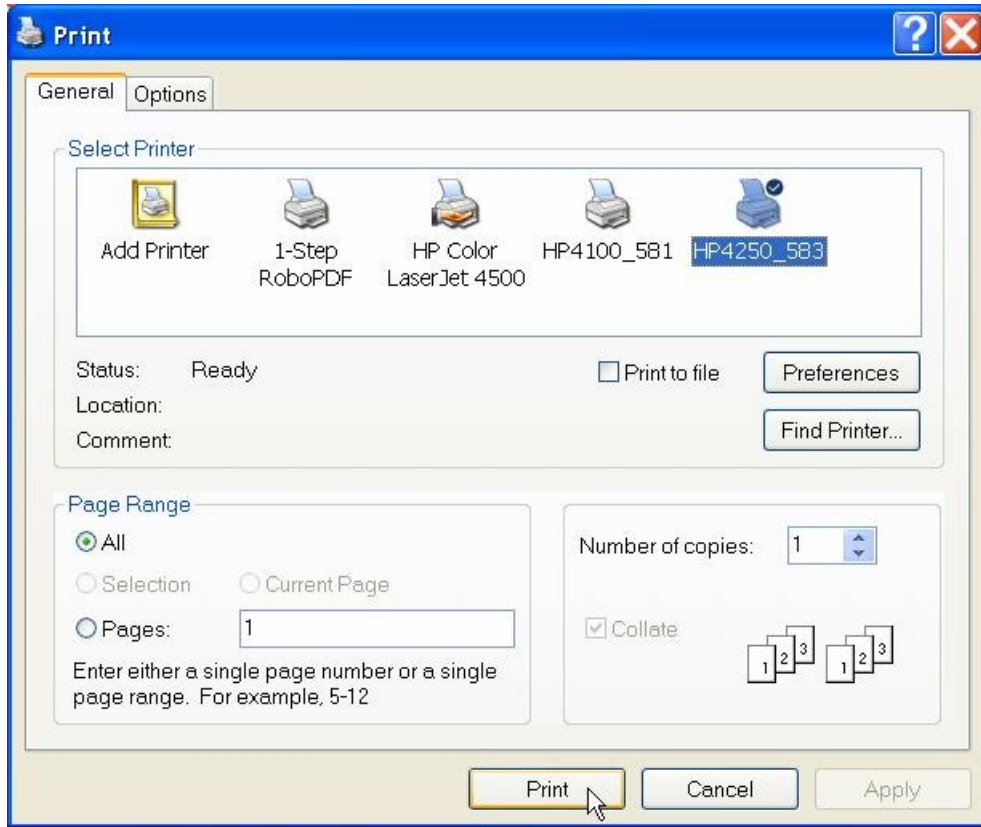
3. **Select a form to print** by clicking on the **check box** next to the **name** of the form. A checkmark will appear in the check box. All of the forms in a particular form set can be simultaneously selected for printing by clicking on the check box next to the name of the form set.



4. **Unselect a form** or form set by clicking on the **check box** next to the **name** of the form or form set. The checkmark will be removed from the check box.
5. Click the **Print Selected Forms** link. A pop-up message will appear stating that the number of forms selected for printing may take some time to print.
6. Click **OK** to continue with the printing operation. SAMS will display a printable version of all the selected forms in a separate browser window. The forms are displayed and printed in the order they appear on the Form Tree. Otherwise, click **Cancel** if you do not want to continue with the printing operation.
7. From the **File** menu of the new browser window, click **Print**. A new print options window will open.



8. Set the printing options you want and click the **Print** button.



Important Information: SAMS will open a new browser window under a few circumstances (e.g. print forms and display field comments). To close these additional browser windows, you must click on the 'X' box in the upper right hand corner of the browser window (or press CTRL+W).

Importing Form Data from a File

SAMS allows users to electronically import data that is collected on the State Aid forms using a pre-defined text file format.

1. Select the **Import Form Data** submenu item from the **Forms** main menu located near the top of the screen. The Electronic File Import screen will appear.

Name: ONEIDA CITY SD
BEDS Code: 251400
Claim Year: 2006-2007 SET VALUES

SAMS
NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Welcome Oneida User (Role Id: 17) Home | Issue Reporting | Help | Logout

Entity Info | Forms | Activity Log |

Electronic File Import

Follow these steps to import a form data file:

1. Select a **Data Area** to import your file to.
2. Click the **Browse** button to browse your computer and select a file, or type the path to the file in the box below (e.g. C:\example.txt).
3. Click the **Import** button.

The results of the import process will be displayed below.

After importing you will be able to review, revise and complete the edit process before Certifying and submitting your data.

Official Data Area.
Browse...
Import

2. Select a **Data Area** to import the data into (e.g. Official).
3. Click the **Browse** button to browse your computer and select a file to import.
4. Click the **Import** button.

Important Information: The results of the file import process will be displayed at the bottom of the screen. If an item in the file is not valid, then that record in the file will not be loaded into SAMS. The items that were not successfully loaded into SAMS must be corrected in the import file (based on the direction provided by the import results) and imported again.

The SAMS file import format is the same as the file import format used by DEA. If you have successfully completed a DEA file import in the past, similarly formatted files should import to SAMS. Please be aware that SAMS implements a strict enforcement of the file import specification, which requires both header and end-of-file markers. The file format specification is available at:

https://stateaid.nysed.gov/sams/SAMS_file_imp_specs.htm

Unit 3:

Getting and Using Help

Unit Overview

Help is an important feature of any application. The help files for SAMS can be accessed from anywhere within the application. SAMS help is context sensitive and can provide users with a built-in table of contents, index, search facility, and glossary.

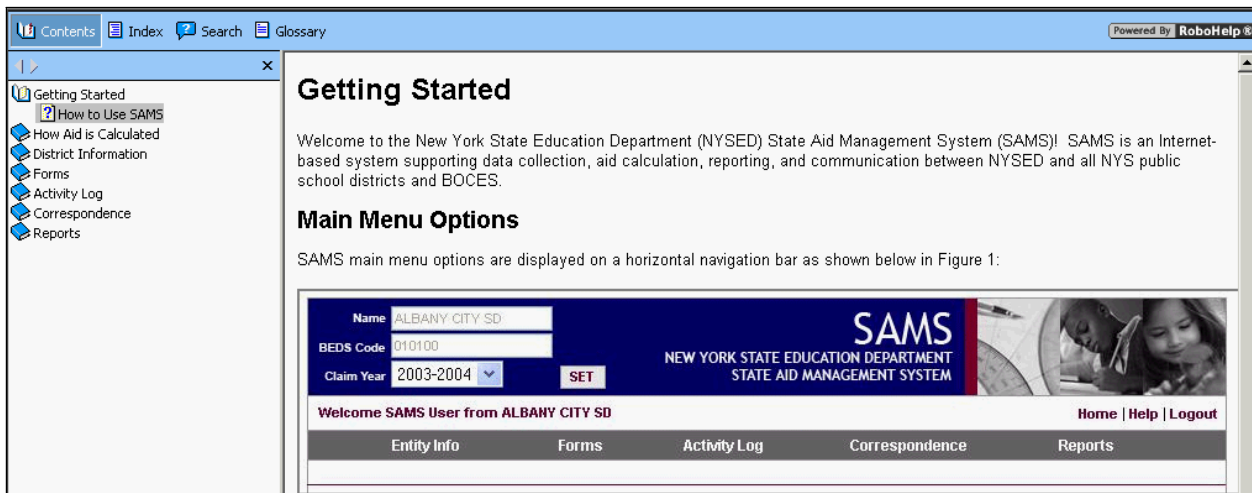
Accessing Help

Click the **Help** link located near the top-right corner of the application to access help. A separate window containing all of the help content for SAMS will appear. Pressing the **F2** function key is a keyboard shortcut that will also launch the SAMS help window. The F1 function key is reserved for the help content of the browser being used to display the SAMS application.



The screenshot shows the top navigation bar of the SAMS application. On the left, there are input fields for 'Name' (ONEIDA CITY SD), 'BEDS Code' (251400), and 'Claim Year' (2006-2007) with a 'SET VALUES' button. The center features the 'SAMS' logo and the text 'NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM'. On the right, there is a small image of two children. Below the header, a navigation bar includes 'Welcome Oneida User (Role Id: 17)' and links for 'Home', 'Issue Reporting', 'Help', and 'Logout'. A secondary bar at the bottom contains links for 'Entity Info', 'Forms', and 'Activity Log'.

To scroll through a table of contents for help, click the **Contents** tab. When you want to find specific keywords, click the **Index** tab and type your word(s) in the designated box. A **Search** tab is available to search for topics that contain references to the word(s) you enter in the search box. Definitions for common terms can be viewed in the **Glossary** tab.



The screenshot displays a help window titled 'Getting Started'. The window has a top navigation bar with tabs for 'Contents', 'Index', 'Search', and 'Glossary'. A left sidebar contains a tree view with items like 'Getting Started', 'How to Use SAMS', 'How Aid is Calculated', 'District Information', 'Forms', 'Activity Log', 'Correspondence', and 'Reports'. The main content area includes a 'Welcome to the New York State Education Department (NYSED) State Aid Management System (SAMS)' message, a 'Main Menu Options' section with a reference to Figure 1, and a smaller version of the SAMS application header. This smaller header shows 'Name' (ALBANY CITY SD), 'BEDS Code' (010100), 'Claim Year' (2003-2004), and a 'SET' button. It also includes a 'Welcome SAMS User from ALBANY CITY SD' message and navigation links for 'Home', 'Help', and 'Logout'. A bottom bar contains links for 'Entity Info', 'Forms', 'Activity Log', 'Correspondence', and 'Reports'. The window is powered by RoboHelp.

Printing a Help Topic

To print a help topic:

1. From the **File** menu of the help window, click **Print**. A new print options window will open.
2. Set the printing options you want and click the **Print** button.

Important Information: If everything displayed in the help window prints, including the frame on the left that contains the Contents tab, then change your printing options. Under the Options tab in the print options window, select the option to print **'Only the selected frame'** and left-click the mouse on the topic you want to print before printing it

About Context-Sensitive Help

Context-sensitive help provides information relevant to the task the user is currently trying to accomplish, such as entering data on a form. Where enabled, the following types of context-sensitive help are available in SAMS:

- **Form-level Help:** When the cursor is not in a particular field on a form and help is accessed, the help topic specific to that form is displayed.
- **Field-level Help:** When the cursor is in a particular field on a form and help is accessed, the help topic specific to that field is displayed.

Unit 4:

Working with Forms- Part II

Unit Overview

In Unit 2- Working with Forms- Part I, an overview of how to interact with SAMS forms was provided. In this unit, additional information will be presented on working with SAMS forms. Information on the form status indicator will be presented so that you gain an understanding of how your forms move through the SAMS workflow process. The SAMS edit exception report process will also be presented. Finally, information on how to certify your State Aid data submittals will be outlined.

Understanding the Status of Forms

The State Aid data collection forms are logically grouped into components known as ‘**form sets**’. For example, Form A and all of its related schedules are considered a form set. Forms and form sets achieve various **statuses** as they are processed through SAMS. These statuses are used to control system functions and workflow-type activities.

Status is controlled at the form level, but can be rolled up to the form set level using pre-defined business logic. In addition, there may be dependencies between statuses that dictate the status(es) that must precede another status before it can be achieved. The status of each form and form set is displayed next to its name on the Form Selection Tree. If the status is Null, however, nothing will be displayed next to the name of the form or form set. A summary of the statuses is provided in the table below. The statuses in the table are listed in the approximate order in which they are achieved as the forms are processed through SAMS.

Status	Description
Null	Represents the status of a form before a user has begun entering and saving data to it.
Saved	Represents the status of a form when a user begins saving data to it. Valid prior status- Null, Saved
Ready	Represents the status of a form when a user has completed entering and saving data to it. The user must press the ‘Save & Ready’ button to change the status of the form to Ready. Valid prior status- Null, Saved, Ready

Status	Description
Certified	<p>Represents the status when the form set of a school entity has been certified by the Superintendent. Certification simultaneously acts as the official submission of the form set data to NYSED. Form sets are certified separately through the use of a certification form that is specific to each form set. The Edit Exception Report(s) associated with a form set must be in the Ready state before the form set can be certified. After certification school entities have read-only access to their forms in the Official Data Area, but they could enter changes in the Revision Data Area.</p> <p>Valid prior status- Ready</p>
Edit in Progress	<p>Represents the status when NYSED begins their edit process of a school entity's form set. School entities will not be able to submit changes to their data while the associated form set is in this status.</p> <p>Valid prior status- Certified, Edit Rejection, Corrections Submitted</p>
Edit Rejection	<p>Represents the status when NYSED rejects an Edit Exception report of a school entity's form set during their edit process.</p> <p>Valid prior status- Edit in Progress</p>
Corrections Submitted	<p>Represents the status when a school entity re-submits a form set with corrected items during the edit process.</p> <p>Valid prior status- Edit Rejection</p>
Corrections In Progress	<p>Represents the state of the data when NYSED has begun reviewing a district's corrections.</p> <p>Valid prior status- Corrections Submitted</p>
Corrections Accepted	<p>Represents the status when NYSED accepts the submitted corrections.</p> <p>Valid prior status- Corrections In Progress</p>

Status	Description
Corrections Rejected	<p>Represents the status when NYSED rejects the corrections submitted by a school entity.</p> <p>Valid prior status- Corrections In Progress</p>
Clean	<p>Represents the status when all edit exceptions have been adequately explained and the edit process is complete. If there are no edit exceptions when a form set is certified/submitted, then the system will automatically change the status to Clean and the manual edit process will be avoided.</p> <p>Valid prior status- Certified, Edit in Progress, Corrections Accepted, Clean with Issues, Revision Accepted</p>
Clean with Issues	<p>Represents the status when there are still outstanding edit exceptions after the edit process, but NYSED wants to include this data with the Clean form sets for processing.</p> <p>Valid prior status- Edit in Progress, Corrections Accepted, Revision Accepted</p>
Revision Submitted	<p>Represents the status after a school entity has submitted their revised data to NYSED. Revisions refer to change requests made after the edit process has cleaned a form set. Revisions will be reviewed for approval by NYSED before being accepted as official data. Revisions not accepted by NYSED do not become part of the official data.</p> <p>Valid prior status- Clean, Clean with Issues</p>
Revision in Progress	<p>Represents the status after a school entity has submitted their revised data and NYSED has begun reviewing it.</p> <p>Valid prior status- Revision Submitted</p>
Revision Rejected	<p>Represents the status after a school entity has submitted their revised data and NYSED has rejected it.</p> <p>Valid prior status- Revision in Progress</p>

Status	Description
Revision Accepted	<p>Represents the status after a school entity has submitted their revised data and NYSED has accepted it.</p> <p>Valid prior status- Revision in Progress</p>
Revision Queued	<p>Represents the status after a school entity has submitted their revised data and NYSED has queued it as a Prior Year Revision.</p> <p>Valid prior status- Revision Submitted</p>
Revision Queue Accepted	<p>Represents the status after NYSED has accepted data that was previously queued as a Prior Year Revision.</p> <p>Valid prior status- Revision Queued</p>

Running the Edit Exception Reports

Each form set has an Edit Exception Report associated with it. Edit Exception Reports can be accessed from the Form Tree just like the data entry forms. You can run an Edit Exception Report at any point. In order to certify your form sets, you must first run the Edit Exception Report associated with the form sets and 'Ready' the report by pressing the 'Save & Ready' button at the bottom of each report.

1. Select the Edit Exception Report you want to run from the Form Tree.
2. After the Edit Exception Report page loads, click on the **Run Report** button to run a new report. You must have the default setting, 'Run New', set in the drop down list box. (To see previously executed reports, select one from the drop-down list, and click on **Run Report**.)

The screenshot displays the SAMS (State Aid Management System) interface for Oneida City SD. The header includes the SAMS logo and the text 'NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM'. Below the header, there is a navigation bar with links for 'Home', 'Issue Reporting', 'Help', and 'Logout'. The main content area shows the 'Form A Edit Exception Report' section. A dropdown menu is open, showing a list of previously executed reports with their dates and times. The 'Run Report' button is highlighted, and the 'Run New' option is selected in the dropdown menu. The page also includes a 'Print Form' link and a footer with 'State Aid Homepage | Contact Us' and 'Ver 1.1.30'.

Name: ONEIDA CITY SD
BEDS Code: 251400
Claim Year: 2006-2007 SET VALUES

Welcome Oneida User (Role Id: 17) Home | Issue Reporting | Help | Logout

Entity Info | Forms | Activity Log |

You Have Selected the 'Official' Data Area. [Print Form](#)

District Name: ONEIDA CITY SD District Code: 251400
Contact Person: GREGORY RACE Telephone: (315) 363-8504

Form A Edit Exception Report

Run New Run Report

Run New
08/31/2006 02:16:54 PM
08/31/2006 02:15:07 PM
08/28/2006 09:38:22 AM
08/28/2006 09:36:44 AM
08/25/2006 04:11:51 PM
08/25/2006 04:03:05 PM
08/25/2006 12:11:16 PM
08/24/2006 09:06:54 AM
08/04/2006 01:19:41 PM

State Aid Homepage | Contact Us Ver 1.1.30

3. The results of the Edit Exception Report are displayed. All exceptions that are found are listed. You can use the Edit Exception Report to help you complete the form entry process by identifying problem areas in your data entry process, before you certify and submit to State Aid.

Important Information: All form sets must be certified by the school Superintendent before they are submitted to State Aid. Before you have access to the certification process for a particular form set, you must 'Ready' the Edit Exception Report associated with that form set.

4. You can associate a comment with each exception occurring in the Edit Exception Report. To provide a comment, simply insert text in the comment text field provided with each exception generated. Each Edit Exception Report also has a general comment area at the bottom of the report, where you can associate a comment(s) with the entire report. To save comments without setting the Edit Exception Report to Ready, click on the **Save Comments** button. When you click on the **Save and Ready** button, any comments entered are automatically saved. Comments entered for a particular edit will be displayed on subsequent runs of the Edit Exception Report.

5. **** CRITICAL ****
Projected 1/2 K thru Grade 12 Enrollment can NOT be zero!
Form A, entry 6a, 2004-05 Projected 1/2 K Through Grade 12 Total Enrollment =
(Includes enr. of resident students attending charter schools)

Add New Comment:

Listed above are edit exceptions related to your district's Form A. Please correct the data shown in the edits listed where possible or provide an explanation for each remaining exception. All errors must be resolved before submitting data to the State Education Department.

This area is for general comments for this edit report.

Note: all buttons will save comments.

[State Aid Homepage](#) | [Contact Us](#)


Certifying Form Data

Each form set has its own Certification Form that allows a school entity to officially certify and submit their data for the forms and schedules associated with a form set. Only Superintendents will have access to the certification function.

1. Go to the **Form Tree** under the **Official Data** area and open the **Certification Form** for the form set that you want to certify from within the **Official Data Area**. (In the example below, the form is shown near the bottom and is called 'Form A Certification'.

The screenshot displays a web application interface. At the top, there is a header with "Welcome Oneida User" on the left and "Home | Help | Logout" on the right. Below the header is a navigation bar with "Entity Info | Forms | Activity Log |". The main content area features a tree view under the heading "Expand All | Collapse All". The tree view is expanded to show "Forms", which includes "Form A and Schedules:". Under "Form A and Schedules:", there is a list of items, each with a document icon and a link: "Form A (Attendance)", "Schedule A-1 Religious Holidays First Semester", "Schedule A-2 Attendance Report First Semester", "Schedule A-3 Religious Holidays Second Semester", "Schedule A-4 Attendance Report Second Semester", "Schedule A-5 Days of Session Matrix", "Schedule A-6 Decimal Days of Actual Session Worksheet", "Schedule A-7 Enrollment - Central High School Districts Only", "Schedule B - Dual Enrollment", "Schedule P - Additional Data for Calculations", "Schedule R1 - ERSS Fact Sheet", "Schedule U1 - Charter School Enrollment and FTE", "Schedule U2 - Charter School Enrollment and FTE Continued", "Schedule U4 - Charter School Enrollment by District of Attendance", "Form C Certification", "Form A Edit Report", "Form A Certification", and "Form A Change Submission".

2. Click on the **Certify & Submit** button. The status of the associated form set will be changed to "Certified". The forms within the certified form set will now be read-only to the school entity in the Official Data Area. Any modifications to their certified data must occur in the Revision Data Area (see the Revising Data help topic for more information).



The image shows a screenshot of a web interface. At the top, there are two buttons: "Certify & Submit" and "Reset". Below these buttons, there is a horizontal line. At the bottom of the interface, there is a footer that reads "State Aid Homepage | Contact Us".

Important Information: The Certify & Submit button is only accessible to those users who have been assigned the certification privilege. If you don't have this privilege, you will not see this button. In addition, a form set cannot be certified until its associated Edit Exception Report is in the Ready data state.

Unit 5: The Revision Process

Unit Overview

SAMS supports a mechanism for Districts to submit revisions to their State Aid data sets after they have been certified and submitted to NYSED. These revisions are reviewed by NYSED for their acceptance. This unit provides an overview of how this process works.

About Data Areas

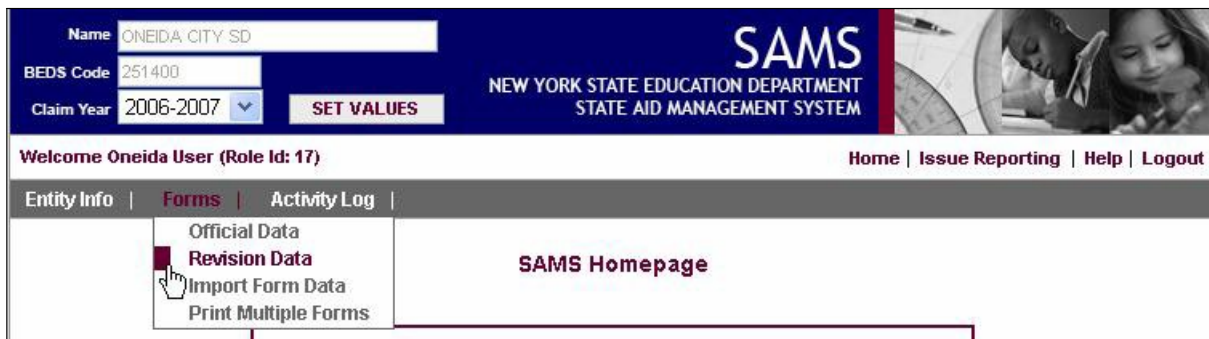
Data Areas are used to logically separate data that is stored in the centralized SAMS database. The data displayed in, and used by, a Data Area is based on the data in the Official Data Area, overlaid with any changes made within a particular data area. The following data areas are available to school entity users in SAMS:

- **Official Data Area:** Refers to all form data entered and saved through the **Official Data** submenu item located within the **Forms** main menu and to all change submissions accepted by NYSED. Aid calculations and official reports are based on the data in the Official Data Area.
- **Revision Data Area:** Refers to all form data entered and saved through the **Revision Data** submenu item located within the **Forms** main menu. The Revision Data area will be used to submit change requests for form sets that have been certified. Change requests will address both change submissions (for changes made during the Claim Review Process) and revision requests (for changes made during the Revision Process). Once accepted by NYSED, revised data is incorporated into the Official Data Area.
- **Sandbox Data Area:** Refers to all form data entered and saved through the **Sandbox Data** submenu item located within the **Forms** main menu. The Sandbox Data Area can be used to “play” with a district’s data to see the effects that various changes to that data would have. The Sandbox Data Area works the same way the Revision Data Area does, except that updates made to a district’s data cannot be submitted for inclusion in the Official Data Area from the Sandbox Data Area. The **Change Submission** forms in the Sandbox Data Area provide a summary of the changes made to the data in that Data Area and are also used to clear the data area of any changes that were made in it.

Revising Form Data

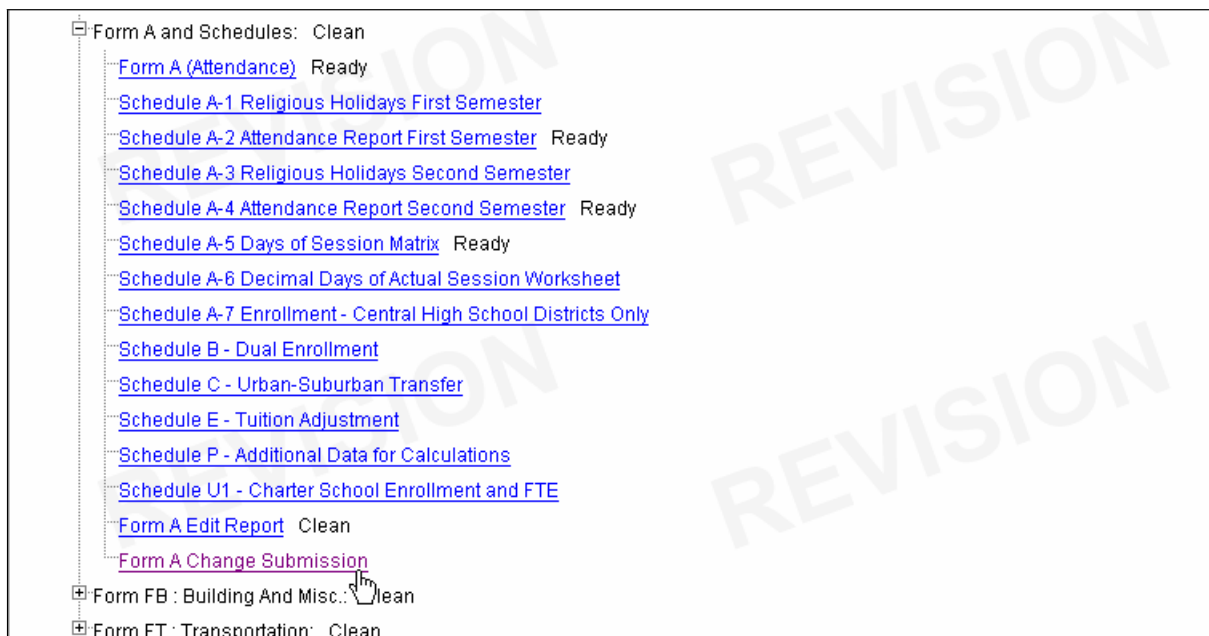
SAMS allows school entity users to revise data that they have certified and officially submitted to NYSED. All revisions must be entered and submitted to NYSED from the Revision Data Area. Once accepted by NYSED, revision data is incorporated into the Official Data Area.

1. Select the **Revision Data** area menu item from the **Forms** menu located near the top of the screen. The Form Selection Tree is displayed for the Revision Data Area.



The screenshot shows the SAMS (New York State Education Department State Aid Management System) user interface. At the top, there is a header with the SAMS logo and the text 'NEW YORK STATE EDUCATION DEPARTMENT STATE AID MANAGEMENT SYSTEM'. Below the header, there is a navigation bar with 'Welcome Oneida User (Role Id: 17)' and links for 'Home | Issue Reporting | Help | Logout'. The main content area has a 'Forms' menu open, showing options: 'Official Data', 'Revision Data' (highlighted with a mouse cursor), 'Import Form Data', and 'Print Multiple Forms'. The 'SAMS Homepage' is also visible in the background.

2. Open the form that you want to revise.
3. Enter your revisions and **Save** the form.
4. From the Revision Data Area form selection tree, open the **Change Submission** form for the form set that you are revising. Each form set has its own **Change Submission** form that allows you to review the pending revisions related to all of the forms within that form set and submit them to NYSED as a single request.



The screenshot shows a tree view of form sets in the Revision Data Area. The tree is expanded to show the following items:

- Form A and Schedules: Clean
 - [Form A \(Attendance\)](#) Ready
 - [Schedule A-1 Religious Holidays First Semester](#)
 - [Schedule A-2 Attendance Report First Semester](#) Ready
 - [Schedule A-3 Religious Holidays Second Semester](#)
 - [Schedule A-4 Attendance Report Second Semester](#) Ready
 - [Schedule A-5 Days of Session Matrix](#) Ready
 - [Schedule A-6 Decimal Days of Actual Session Worksheet](#)
 - [Schedule A-7 Enrollment - Central High School Districts Only](#)
 - [Schedule B - Dual Enrollment](#)
 - [Schedule C - Urban-Suburban Transfer](#)
 - [Schedule E - Tuition Adjustment](#)
 - [Schedule P - Additional Data for Calculations](#)
 - [Schedule U1 - Charter School Enrollment and FTE](#)
 - [Form A Edit Report](#) Clean
 - [Form A Change Submission](#) (highlighted with a mouse cursor)
- Form FB : Building And Misc.: Clean
- Form FT : Transportation: Clean

- To submit the pending revisions that are summarized on the **Change Submission** form to NYSED, press the **Submit Changes** button on the form.

Entity Info | Forms | Activity Log |

You Have Selected the 'Revision' Data Area. [Print Form](#)

District Name: ONEIDA CITY SD District Code: 251400
 Contact Person: GREGORY RACE Telephone: (315) 363-8504

Change Submission Summary

Form	Item #	Official Value(a)	Revised Value(b)	Difference (b-a)	Calc. Field?	School Year
Form A (Attendance)	1b	193	200	7		2006-2007
Form A (Attendance)	5	2583	2590	7	yes	2006-2007

Note: If available, the 'Clear Revisions' button will erase all revision edit report runs for the form set, comments, as well as the revision data.

- To clear the pending revisions that are summarized on the **Change Submission** form from all of the associated forms in the Revision Data area, press the **Clear Revisions** button.
- NYSED will review the requested revision for acceptance into the Official Data Area. Revisions submitted by school districts do not become part of a district's official data until they are accepted by NYSED.

Unit 6: The Entity Information Screen

Unit Overview

In this unit, you will learn about the Entity Information Screen and how it can be used to obtain pertinent demographic and contact information associated with your district. Information will also be presented on how to modify information associated with your district contacts.

The SAMS Entity Information Screen is linked to another information system maintained by NYSED called SEDREF. This system is a central repository maintained by NYSED that contains basic contact information about institutions that interact with NYSED.

Reviewing Entity Information

To review Entity Information associated with your institution, take these steps:

1. Select and click **Entity Info** from the SAMS main menu.
2. SAMS loads the Entity Information screen and you can review all the current demographic information associated with your district. Information presented includes your district's basic identifying attributes, such as District Code, BOCES Code, current Superintendent, and other attributes.

Welcome Oneida User (Role Id: 17) Home | Issue Reporting | Help | Logout

Entity Info | Forms | Activity Log |

Entity Information

[Print Form](#)

District Code	District Name	District Type	
251400	ONEIDA CITY SD	MAJOR	
BOCES Code	BOCES Comp	RIC Code	Superintendent
2590	0	4	RONALD SPADAFORA
Superintendent's Email Address			
RSPADAFORA@ONEIDA-ADMIN.MORIC.ORG			
Superintendent's Phone	Ext		
(315) 363-2550			
Address Line 1			
565 SAYLES STREET			
Address Line 2			
P.O. BOX 327			
City	State	Zip Code	
ONEIDA	NY	13421 - 0327	

State Aid Designee

Salutation	First Name	MI	Last Name	Generation
MR.	GREGORY	A	RACE	
Title				
ASST. SUPERINTENDENT FOR FINANCE				
Phone	Ext	Fax	Email Address	
(315) 363-8504		(315) 363-6728	GRACE@ONEIDA-ADMIN.MORIC.ORG	

Important Information: Most of the basic demographic information presented on the Entity Information screen is read-only. You do have the ability to Modify State Aid related contacts within SAMS. Information on this is presented below.

Updating the Official SAMS Contacts

To update a contact associated with your institution, take these steps:

1. Select and click **Entity Info** from the SAMS main menu.
2. Click on the **Edit Entry** button associated with the contact that you want to update.
3. A new screen will be displayed that allows you edit and update the information about that contact. Click on the **Edit Entry** button after you have made your updates. SAMS returns to the Entity Information screen. The contact updates are now reflected on the screen.

Unit 7: Activity Log

Unit Overview

In this unit, you will learn about the Activity Log and how you can use it to review the history of activities associated with your district work and how to create your own user-defined activities.

SAMS automatically generates activity log records when certain events occur, such as data state changes and email notifications to users of the system. An additional feature within the Activity Log allows users with the appropriate security role privilege to create their own activity records which can record information exchange events that occurred outside of the application (e.g. an email, phone call, or fax to/from a district).

Reviewing the Activity Log

To access the Activity Log follow these steps:

1. Select and click **Activity Log** from the SAMS main menu.
2. SAMS loads the **Activity Log** screen and you can review all the current activities associated with your district. Information associated with each activity log record, includes the activity log id, claim year, form set, activity type, description, date, and user.

SAMS provides the ability to filter the information presented to you in the activity log. To filter, setup your filter preferences from the drop-down boxes provided and click the **Apply Filter** button.

The results displayed in the Activity Log can also be **sorted** by clicking on the title of each column. Click a column name once to sort by that column in Ascending order and click the same column name again to sort the results by that column in Descending order.

The **details** of Correspondence items, and certain other items (e.g. revision submissions), can be viewed in a separate browser window by clicking on the hyperlinks provided for these items.

Activity Log

Form Set:

Category:

Activity Type:

Date Range (mm/dd/yyyy): -

Log ID	BEDS Code	Claim Year	Form Name	Activity Type	Description	Date	User
100362	250109	2006-2007	Form Set ST-3	Correspondence	Notification	01/23/2007 12:24 PM	LBRANDT
100360	250109	2006-2007	ST-3 Edit Report	Data State	Clean	01/23/2007 12:23 PM	LBRANDT
100358	250109	2006-2007	ST-3 Edit Report	Data State	Revision Accepted	01/23/2007 12:23 PM	LBRANDT
100361	250109	2006-2007	Form Set ST-3	Data State	Clean	01/23/2007 12:23 PM	LBRANDT
100359	250109	2006-2007	Form Set ST-3	Data State	Revision Accepted	01/23/2007 12:23 PM	LBRANDT

Adding a User-Defined Correspondence Activity

To add a user-defined correspondence activity follow these steps:

1. To add a correspondence activity, click the **Add Corresp.** Button on the Activity Log page which causes SAMS to load the Add Correspondence page..

NOTE: A user must have the appropriate security role privilege in order to have access to this button. The button will not appear if the user does not have the appropriate privilege assigned to their user role.

2. On the Add Correspondence page select the Correspondence Type from the drop-down box list, the Form ID from the drop-down box, and fill in all the applicable text boxes. When you are ready to save the correspondence, click the **Add Corresp.** Button.

Add Correspondence

Correspondence Type <input type="text" value="Phone"/>	Form Set <input type="text" value="All"/>	
To: First Name <input type="text"/>	To: Last name <input type="text"/>	
To: Email <input type="text"/>	To: Phone Number <input type="text"/>	To: Fax Number <input type="text"/>
From: User Id <input type="text" value="SUPER01"/>	From: First Name <input type="text"/>	From: Last name <input type="text"/>
From: Email <input type="text"/>	From: Phone Number <input type="text"/>	From: Fax Number <input type="text"/>

Correspondence Content

Unit 8:

The Claim Verification Process

Unit Overview

In this unit you will learn about the Claim Verification (CV) process. This process provides NYSED with an online method to track their progress towards verifying the accuracy of specified data that has been certified and submitted by school districts. Districts will receive an email notification when NYSED initiates the Claim Verification process for a given year. This notification will identify which districts have been selected to participate in the Claim Verification process for that year, as well as, provide additional information about the process to the districts.

Access the Claim Verification Project List

The Claim Verification Project List identifies which Claim Verification projects have been defined for a particular Claim Year and whether or not a particular district has been selected to participate in the Claim Verification process for each of these projects.

To access the Claim Verification Project List, follow these steps:

1. Choose the **Claim Year** in the application header for which you want to view the Claim Verification Project List for and then click on the **SET VALUES** button.
2. In the SAMS application navigate to **Claim Verifications > Claim Verification Project List** from the main menu. The “Claim Verification Project List” screen will appear.

The user is presented with a list of all the Claim Verification projects that have been assigned to the selected year. The “Project Name”, “Project Description”, and “District Action Required?” columns are displayed for the list. The “District Action Required?” column displays a “**Yes**” or “**No**” to indicate if the selected district is required to participate in the Claim Verification process for this project in the selected year.

Acknowledge Receipt of the Claim Verification Intent Notice

Districts who have been selected to participate the Claim Verification process are required to acknowledge their receipt of the intent notice that they will receive via email when SED initiates the Claim Verification process for a particular year. This acknowledgement must be performed for each Claim Verification project that a district has been selected to participate in.

To acknowledge receipt of the Claim Verification Intent Notice, follow these steps:

1. Choose the **Claim Year** in the application header for which you want to view a Claim Verification Project Form for and then click on the **SET VALUES** button.
2. In the SAMS application navigate to **Claim Verifications > Claim Verification Project List** from the main menu. The “Claim Verification Project List” screen will appear.
3. Click on the **Project Name** of the project you want to work with.

If the selected district is required to participate in the project, the user will see the full Claim Verification form. For participating districts, the top of the form contains the date the district was notified by NYSED of their intent to review, the date that any materials are due, and the date the district acknowledged receipt of the notification of intent to review.

If the district has not yet acknowledged receipt of the notification of intent to review, they will be provided a hyperlink to perform this action. Clicking this link will save the acknowledgement date for the districts (refer to the next step). If the district has already acknowledged receipt of the intent notification, the user will see the date they performed this action.

If the district is not required to participate, a smaller, modified version of the form is shown. This smaller version only includes the project fields that are being reviewed and the project explanation/instructions.

4. **Click on the hyperlink** provided to acknowledge receipt of the intent notification.

Enter a Comment on a Claim Verification Project Form

Claim Verification project forms are defined each year for use in tracking the process of verifying the accuracy of specified data that has been certified and submitted by school districts. District users are able to enter comments on these forms.

To enter a comment on a Claim Verification Project Form, follow these steps:

1. Choose the **Claim Year** in the application header for which you want to view a Claim Verification Project Form for and then click on the **SET VALUES** button.
2. In the SAMS application navigate to **Claim Verifications > Claim Verification Project List** from the main menu. The “Claim Verification Project List” screen will appear.
3. Click on the **Project Name** of the project you want to work with.

If the selected district is required to participate in the project, the user will see the full Claim Verification form. For participating districts, the top of the form contains the date the district was notified by SED of their intent to review, the date that any materials are due, and the date the district acknowledged receipt of the notification of intent to review. If the user is a District user and has not yet acknowledged receipt of the notification of intent to review, they will get a hyperlink saying “Districts, Click here to acknowledge receipt of notification of intent.” Clicking this link will save the acknowledgement date for the districts. If the district has acknowledged, the user will see the date they performed this action.

If the district is not required to participate, a smaller, modified version of the form is shown. This smaller version only includes the project fields that are being reviewed and the project explanation/instructions. Comments cannot be entered on Claim Verification forms for a project that a district has not been selected to participate in.

4. To add a new comment, the user will type the comment details into the text area labeled “**New Comment**” and press the “**Save Form**” button. Comments show on the form in descending order of created date.

Review the Claim Verification Activity Log

SAMS automatically generates Claim Verification Activity Log records when certain Claim Verification events occur. Users can review and filter these activity records.

To review the Claim Verification Activity Log, follow these steps:

1. In the SAMS application, navigate to **Claim Verifications > Claim Verification Activity Log** from the main menu. This screen will show a default activity log filtered only by Claim Year and district Name/BEDS Code set in the header of the application.
2. Users can choose a variety of filter options to narrow the scope of the list.
 - a. Project List – Filters by a specific project.
 - b. CV Activity Type – Filters by correspondence, due date, notice, or status date.
 - c. Date Range – Start and end dates used to narrow the displayed results based on comparison against the Date of each activity.
3. After selecting filter options, click the “**Apply Filter**” button to apply the filter options.

Note: The log has the ability to sort all columns by clicking the column name, which is a hyperlink. The default sort is by Date, descending. Clicking a column that is already the sorted column will change the direction of the sort (e.g. from descending to ascending). If an activity is a correspondence, the activity type will show as a hyperlink. Clicking this link will show the details of the correspondence that is tied to this activity.

Unit 9: Output Reports

Unit Overview

In this unit you will learn about viewing and printing Output Reports. These reports are used to display the amount of State Aid to be paid to a district.

View or Print Output Reports from SAMS

To view or print an Output Report within SAMS, follow these steps:

1. Select the **Claim Year** in the application header for which you want to view the Output Report and then click on the **SET VALUES** button.
2. In the SAMS application navigate to **Reports > Output Reports** from the main menu.

The Output Report selection screen will appear. The reports available in the tree are based on the Claim Year that is set in the application header.

3. Select a **Data Area** and **Data Version Date**.

The Data Area selection specifies which Data Area the report will retrieve data from and the Data Version Date selection determines what version of data the report will retrieve. See the “**About Data Areas**” section in this manual for more information about Data Areas.

4. Select a report version to view from the selection tree by clicking on it.

The Output Report will be displayed and link will be available to print the Output Report. A separate window will open with a printer friendly version of the Output Report after clicking on the **Print Form** link. Use the browser’s print functionality to print the report. To close the newly opened browser window, you must click on the ‘X’ box in the upper right hand corner of the browser window or press ‘CTRL+W’ when that window is active.

Not Available - Coming Soon

View or Print Output Reports from the State Aid Public Website

To view or print an Output Report from the State Aid public website, follow these steps:

1. Navigate to the public URL.
2. Select a School Year.
3. Enter a District Name or BEDS Code.
4. Click on the **Submit** button. A list of Output Reports for the given School Year and District will be displayed as hyperlinks.
5. Click on the name of a report to view it. Use the browser's print functionality to print the report.

Notes:

- A partial District Name or BEDS Code can be entered and a list of matching districts will be displayed after clicking on the submit button. Leave both the District Name and BEDS Code blank to retrieve the full list of districts.
- The list of publicly viewable Output Reports will only be displayed for Major and Big 5 School Districts whose primary form sets (A, FB, FT, and ST-3) are in the CLEAN or greater data state.