# TABLE OF CONTENTS

## Unit 1: Orientation to SAMS

- **Unit Overview** .................................................................................................................. 4
- **Logging In and Out of SAMS** .......................................................................................... 5
  - **Overview** ...................................................................................................................... 5
  - **Logging in** .................................................................................................................... 6
  - **Logging out** .................................................................................................................. 8
  - **Session Timeout** ........................................................................................................... 9
  - **Summary** ..................................................................................................................... 10
- **Overview of Header and Menu Bar Options** .................................................................. 11
- **Header Description** ........................................................................................................ 12
- **Menu Bar Options** .......................................................................................................... 13
- **Summary** ....................................................................................................................... 15

## Unit 2: Working with Forms- Part I

- **Unit Overview** ................................................................................................................. 16
- **Opening a Form** ............................................................................................................... 17
- **Entering and Saving Form Data** ..................................................................................... 19
- **Adding Comments to Form Fields** ................................................................................ 21
- **Printing a Form** ............................................................................................................. 23
  - **Printing a Form with Data** ......................................................................................... 23
  - **Printing a Blank Form** ............................................................................................... 26
  - **Printing a Selected Part of a Form** ............................................................................ 28
  - **Printing Multiple Forms** ........................................................................................... 30
- **Importing Form Data from a File** .................................................................................. 33

## Unit 3: Getting and Using Help

- **Unit Overview** ................................................................................................................ 34
- **Accessing Help** ............................................................................................................. 35
- **Printing a Help Topic** .................................................................................................... 36
- **About Context-Sensitive Help** ...................................................................................... 37

## Unit 4: Working with Forms- Part II

- **Unit Overview** ................................................................................................................ 38
- **Understanding the Status of Forms** .............................................................................. 39
- **Running the Edit Exception Reports** ............................................................................. 43
- **Certifying Form Data** .................................................................................................... 45

## Unit 5: The Revision Process

- **Unit Overview** ................................................................................................................ 47
- **About Data Areas** .......................................................................................................... 48
- **Revising Form Data** ...................................................................................................... 49

## Unit 6: The Entity Information Screen

- **Unit Overview** ................................................................................................................ 51
- **Reviewing Entity Information** ...................................................................................... 52
- **Updating the Official SAMS Contacts** ......................................................................... 53

## Unit 7: Activity Log

- **Unit Overview** ................................................................................................................ 54
- **Reviewing the Activity Log** .......................................................................................... 55
- **Adding a User-Defined Correspondence Activity** ....................................................... 56
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:


2. After the Portal page appears, click on the ‘Log On’ menu option in the upper right hand side of the page.

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 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.

   **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.
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.
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).

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.
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.

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.
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.

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.

**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.

**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.

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 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.
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.

![Print dialog box](image)

**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.

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](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.

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.
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 know 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.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Null</td>
<td>Represents the status of a form before a user has begun entering and saving data to it.</td>
</tr>
<tr>
<td>Saved</td>
<td>Represents the status of a form when a user begins saving data to it.</td>
</tr>
<tr>
<td></td>
<td><strong>Valid prior status- Null, Saved</strong></td>
</tr>
<tr>
<td>Ready</td>
<td>Represents the status of a form when a user has completed entering and saving data to it. The user must press the ‘Save &amp; Ready’ button to change the status of the form to Ready.</td>
</tr>
<tr>
<td></td>
<td><strong>Valid prior status- Null, Saved, Ready</strong></td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Certified</td>
<td>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.</td>
</tr>
<tr>
<td>Edit in Progress</td>
<td>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.</td>
</tr>
<tr>
<td>Edit Rejection</td>
<td>Represents the status when NYSED rejects an Edit Exception report of a school entity’s form set during their edit process.</td>
</tr>
<tr>
<td>Corrections Submitted</td>
<td>Represents the status when a school entity re-submits a form set with corrected items during the edit process.</td>
</tr>
<tr>
<td>Corrections In Progress</td>
<td>Represents the state of the data when NYSED has begun reviewing a district's corrections.</td>
</tr>
<tr>
<td>Corrections Accepted</td>
<td>Represents the status when NYSED accepts the submitted corrections.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Corrections Rejected</td>
<td>Represents the status when NYSED rejects the corrections submitted by a school entity.</td>
</tr>
<tr>
<td>Clean</td>
<td>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.</td>
</tr>
<tr>
<td>Clean with Issues</td>
<td>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.</td>
</tr>
<tr>
<td>Revision Submitted</td>
<td>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.</td>
</tr>
<tr>
<td>Revision in Progress</td>
<td>Represents the status after a school entity has submitted their revised data and NYSED has begun reviewing it.</td>
</tr>
<tr>
<td>Revision Rejected</td>
<td>Represents the status after a school entity has submitted their revised data and NYSED has rejected it.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Revision Accepted</td>
<td>Represents the status after a school entity has submitted their revised data and NYSED has accepted it.</td>
</tr>
<tr>
<td></td>
<td><strong>Valid prior status - Revision in Progress</strong></td>
</tr>
<tr>
<td>Revision Queued</td>
<td>Represents the status after a school entity has submitted their revised data and NYSED has queued it as a Prior Year Revision.</td>
</tr>
<tr>
<td></td>
<td><strong>Valid prior status - Revision Submitted</strong></td>
</tr>
<tr>
<td>Revision Queue Accepted</td>
<td>Represents the status after NYSED has accepted data that was previously queued as a Prior Year Revision.</td>
</tr>
<tr>
<td></td>
<td><strong>Valid prior status - Revision Queued</strong></td>
</tr>
</tbody>
</table>
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.)

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.
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’.)
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).

**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 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, expect 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.

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

<table>
<thead>
<tr>
<th>Entity Info</th>
<th>Forms</th>
<th>Activity Log</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You Have Selected the 'Revision' Data Area.

<table>
<thead>
<tr>
<th>District Name</th>
<th>Contact Person</th>
<th>District Code</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONEDA CITY SD</td>
<td>GREGORY RACE</td>
<td>251400</td>
<td>(315) 363-8504</td>
</tr>
</tbody>
</table>

Change Submission Summary

<table>
<thead>
<tr>
<th>Form</th>
<th>Item #</th>
<th>Official Value(a)</th>
<th>Revised Value(b)</th>
<th>Difference (b-a)</th>
<th>Calc. Field?</th>
<th>School Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form A (Attendance)</td>
<td>1b</td>
<td>133</td>
<td>200</td>
<td>7</td>
<td></td>
<td>2006-2007</td>
</tr>
<tr>
<td>Form A (Attendance)</td>
<td>5</td>
<td>2500</td>
<td>2580</td>
<td>7</td>
<td>yes</td>
<td>2006-2007</td>
</tr>
</tbody>
</table>

6. 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.

7. 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.
Unit 6: The Entity Information Screen

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.

### 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.
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.
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 in 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.
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.