



Children's Services Council
of Broward County
Our Focus is Our Children.

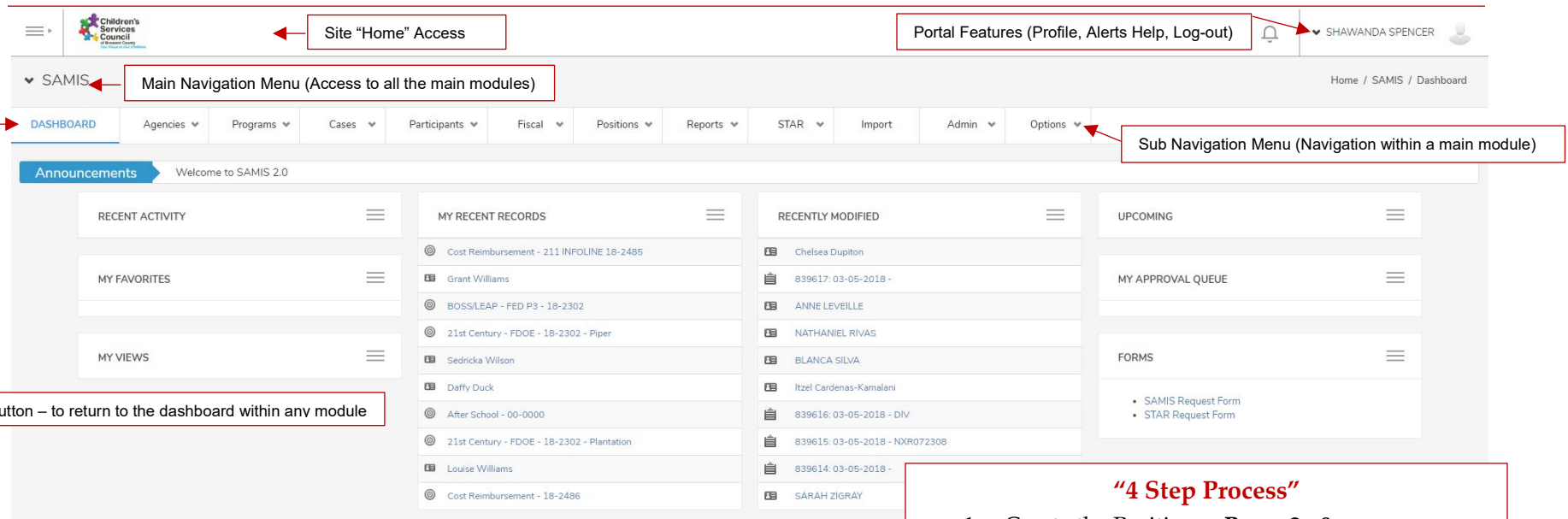
ENTERING BUDGET(s) IN SAMIS

Budget Training

Children's Services Council of Broward County

Presented by the Finance Department

Children's Services Council of Broward County SAMIS 2.0 – Budget Training



Site "Home" Access

Portal Features (Profile, Alerts Help, Log-out)

SHAWANDA SPENCER

SAMIS

Main Navigation Menu (Access to all the main modules)

Home / SAMIS / Dashboard

DASHBOARD

Agencies

Programs

Cases

Participants

Fiscal

Positions

Reports

STAR

Import

Admin

Options

Sub Navigation Menu (Navigation within a main module)

Announcements

Welcome to SAMIS 2.0

RECENT ACTIVITY

MY FAVORITES

MY VIEWS

MY RECENT RECORDS

RECENTLY MODIFIED

UPCOMING

MY APPROVAL QUEUE

FORMS

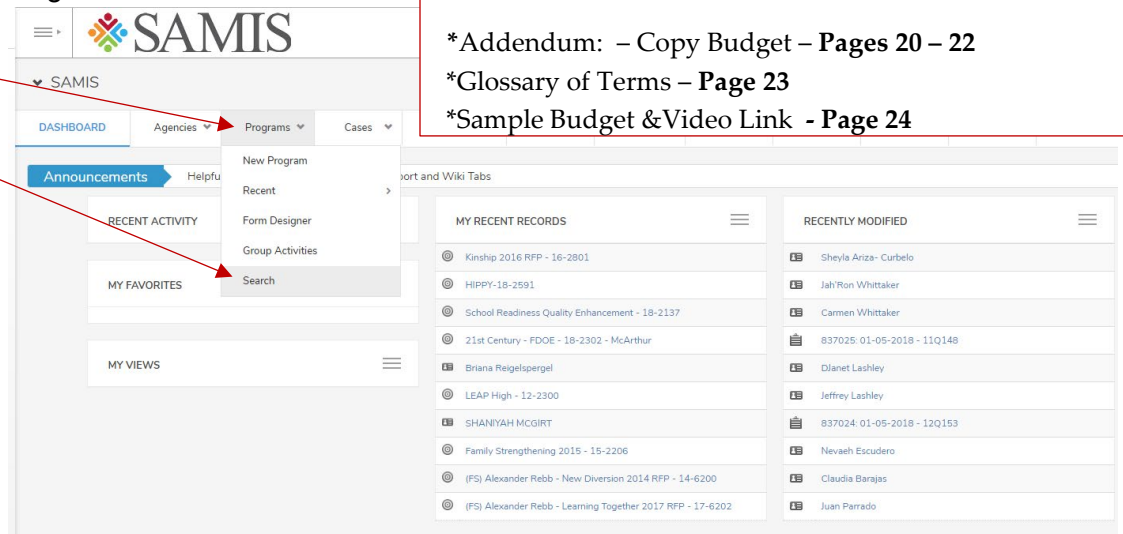
• SAMIS Request Form

• STAR Request Form

Dashboard "Home" button – to return to the dashboard within any module

Entering Budget(s) In SAMIS "Step 1 – Creating Position(s)"

- From the **Main Menu** of SAMIS 2.0 "Search for your Program"
 - Click the **"Programs Tab"**
 - Then select **"Search"**



SAMIS

SAMIS

DASHBOARD

Agencies

Programs

Cases

Announcements

Helpful

RECENT ACTIVITY

MY FAVORITES

MY VIEWS

New Program

Recent

Form Designer

Group Activities

Search

Report and Wiki Tabs

MY RECENT RECORDS

RECENTLY MODIFIED

• Kinship 2016 RFP - 16-2801

• HIPPIY-18-2591

• School Readiness Quality Enhancement - 18-2137

• 21st Century - FDOE - 18-2302 - McArthur

• Briana Reigelspergel

• LEAP High - 12-2300

• SHANIYAH MCGIRT

• Family Strengthening 2015 - 15-2206

• (FS) Alexander Rebb - New Diversion 2014 RFP - 14-6200

• (FS) Alexander Rebb - Learning Together 2017 RFP - 17-6202

• Sheyla Ariza - Curbelo

• Jah'Ron Whittaker

• Carmen Whittaker

• 837025: 01-05-2018 - 11Q148

• Dianet Lashley

• Jeffrey Lashley

• 837024: 01-05-2018 - 12Q153

• Nevaeh Escudero

• Claudia Barajas

• Juan Parrado

"4 Step Process"

1. Create the Positions - Pages 2 - 8
2. Define the Fringe Percentages - Page 9
3. Create the Funders - Page 10
4. Enter the Budget - Pages 11 - 19

*Addendum: – Copy Budget – Pages 20 – 22

*Glossary of Terms – Page 23

*Sample Budget & Video Link - Page 24

Now that you are on the Program Search Screen;

If you have access to multiple programs, the Add Filter Drop Down will assist you with narrowing down your search to locate a specific program.

The screenshot shows the SAMIS interface with the 'PROGRAMS' tab selected. The 'Add Filter' dropdown menu is open, displaying a list of filter options. The table below shows a list of programs with columns for Contract Number, Agency Name, Program Name, Cases, Classifications, Program Id, Title, Active, and Agency Name.

Contract Number	Agency Name	Program Name	Cases	Classifications	Program Id	Title	Active	Agency Name
18-6262			130	Cost Reimbursement,FY18 - 10.1.2 - STEP	3062	18-6262	Yes	Abilities
ms		MOST 2017 RFP - (YR) - SN - 17-2695	59	FY17 - 10.1.1 - After School/Summer Program,MOST...	3044	MOST 2017 RFP - (Y...	Yes	After School Prog
ms		Youth Force 2015 RFP - 16-2964	473	FY15 - 3.1.1 - Youth Development Activities GP,FY16...	1961	Youth Force 2015 RF...	Yes	After School Prog
ms		MOST 2017 RFP - (YR) - 17-2696	1643	FY17 - 7.1.2 - Out-of-School,MOST 2017 RFP - (YR),...	3031	MOST 2017 RFP - (Y...	Yes	After School Prog
5 17-2530	Ann Storck Center, Inc.	MOST 2017 RFP - (YR) - SN - 17-2530	39	FY17 - 10.1.1 - After School/Summer Program,MOST...	3045	MOST 2017 RFP - (Y...	Yes	Ann Storck Cente

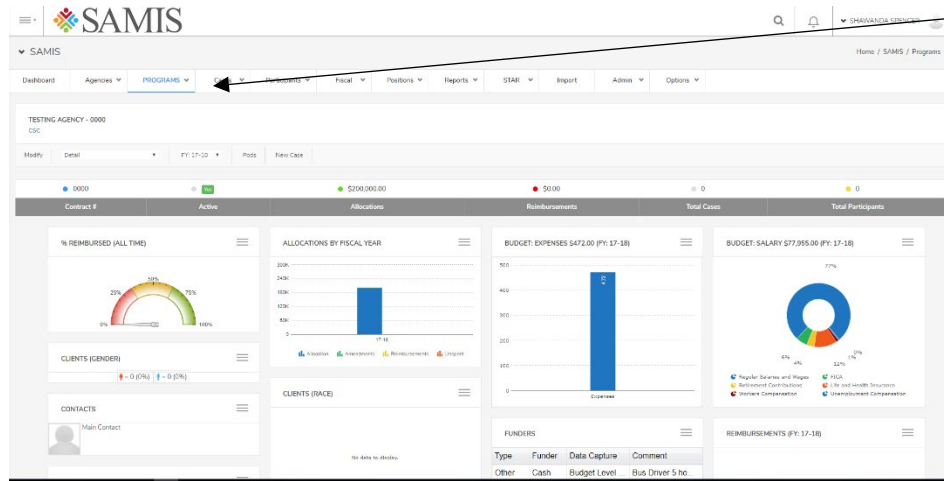
Once the Program(s) return and are displayed in the bottom portion of the screen.

- Please select the **appropriate program** by double clicking on the row itself.

The screenshot shows the SAMIS interface with the 'PROGRAMS' tab selected. The search filters are set to 'Fiscal Years Contains 17-18' and 'Agency Name Contains CSC'. The table below shows a single program result.

Contract Number	Agency Name	Program Name	Cases	Classifications	Program Id	Title	Active	Agency Name
1 0000	CSC	Testing Agency - 0000	0		3054	Testing Agency - 0000	Yes	CSC

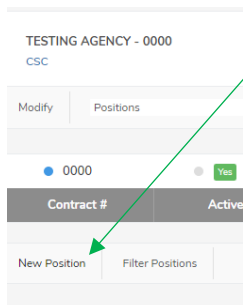
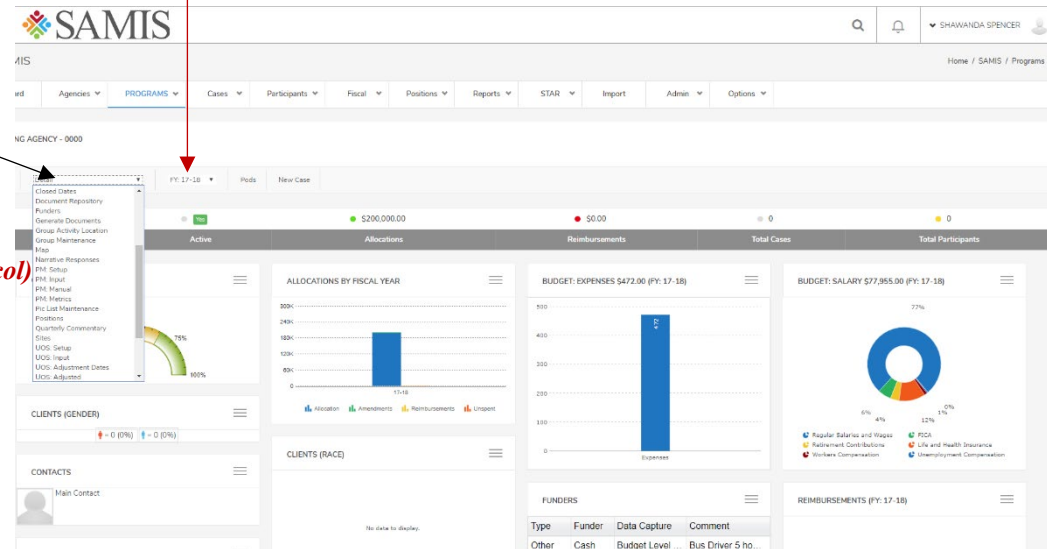
After double clicking on the program, that will bring you to the Splash Page for the “Program” that was selected.



- Please select the **“Accurate Fiscal Year”**
 - Then Click on the **“View/Detail Drop Down”** and Select **“Positions”**

Please Note: If Positions Were Previously Created to Support This Program They Will Display. To Prevent Duplicate Positions for the same program it is vital that You Search for Position(s) First, Prior To Creating A New Position. If the Position Does Not Exist

- Then Click **“New Position”**
(for FY18-19 we are creating all new positions due to the change in the naming protocol)



AGENCY POSITIONS

In Use?	Title
---------	-------

Creating “New Position(s) To The Agency” (Please ensure to complete all required fields indicated by the *asterisks*).

- Please Select the “**Appropriate Agency Name**”
- Enter “**Position Title**”
- Select Appropriate “**Category**” (that applies to the Position Title)
- Please enter the “**Expected Hours**” (Full-Time – 40, Part-Time – number of hours expected)
- Please enter the “**Position Start Date**” (which is the start date of the contract....ie 10/01/2018)
- “**Position End Date**” (in this case NO end date should be applied in this field)

Assigning “New Positions(s) To A Program”

- Select the Appropriate “**Program**”
- Enter “**Support Start Date**”
(Should Be the Contract Start Date 10/01/2018)
- “**Support End Date**”
(In this case no end date should be applied)
- Enter “**Program %**”
(Which Is the % of Time the Position Is Allocated to The Program)
- Enter Staff
 - If a New Staff Name is known at the time of entry, please Click the + key to Add A “New Staff”
(and follow the instructions on the next page)
 - If Staff Name already exist, begin typing the name and then select it from the drop down
 - If the Staff Name is not known at the time of entry, please leave blank and
- Click **Save**

Position: 0

* Agency: Enter Agency Name

* Title:

* Category: Select One

* Expected Hours / Wk:

* Position Start Date:

* Position End Date:

Program Support

* Program: Select Program

* Support Start:

Support End:

* Program %:

Staff	Hours / Wk	Assignment Start	Assignment End	Termination
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Assignment + New Staff

Add Program Support

After Saving, Go To: Detail Page

Save Cancel

Adding “New Staff” To A Program”

- Enter “**Agency Employee ID**” from your Payroll Records
- Enter “**First Name**”
- Enter “**Middle Initial**” (optional)
- Enter “**Last Name**”
- Select the “**Race**”
- Select the “**Ethnicity**”
- Select the “**Gender**”
- Select the “**Language Spoken**”
- Enter “**Currently Active Status of the Staff**” (Yes or No) and then
- Click “**Save**”

Add New Staff ×

NOTE: Adding a new staff to the system does not automatically adds the staff to the program. Once you add staff to the system by completing the form below, you will need to select the newly added staff in the new assignment.

*	Agency Employee ID	<input type="text"/>
*	First Name	<input type="text"/>
	Middle Initial	<input type="text"/>
*	Last Name	<input type="text"/>
	Race	Select One ▼
	Ethnicity	Select One ▼
	Gender	<input type="radio"/> Female <input type="radio"/> Male
	Language Spoken	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Haitian Creole <input type="checkbox"/> Other
*	Currently Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

Now That You Have Added the New Staff, The Next Step Is to Assign the New Staff to The Program.

Assigning “New Staff” To A Program”

- Ensure that the **Staff Name** is displayed in the Name Field (*begin typing the name of the staff, and then select the staff name from the list of names displayed*)
 - Enter the **Expected hours** in a program (Full-Time – 40, Part-Time – Expected Hours)
 - Enter the **Assignment Start Date**
 - Click **Add Assignment** (if applicable to enter additional staff members)
 - Click **Save**

Position: 0

* Agency:

* Title:

* Category:

* Expected Hours / Wk:

* Position Start Date:

* Position End Date:

Program Support

* Program:

* Support Start:

Support End:

* Program %:

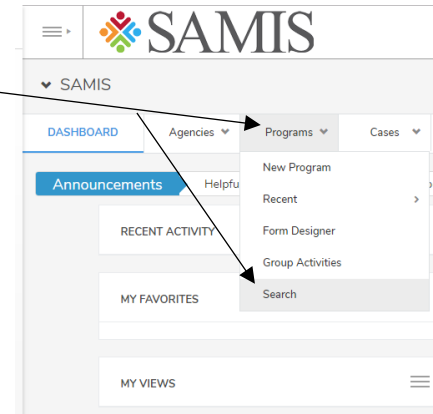
Staff	Hours /	Assignment Start	Assignment End	Termination	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>

After Saving, Go To:

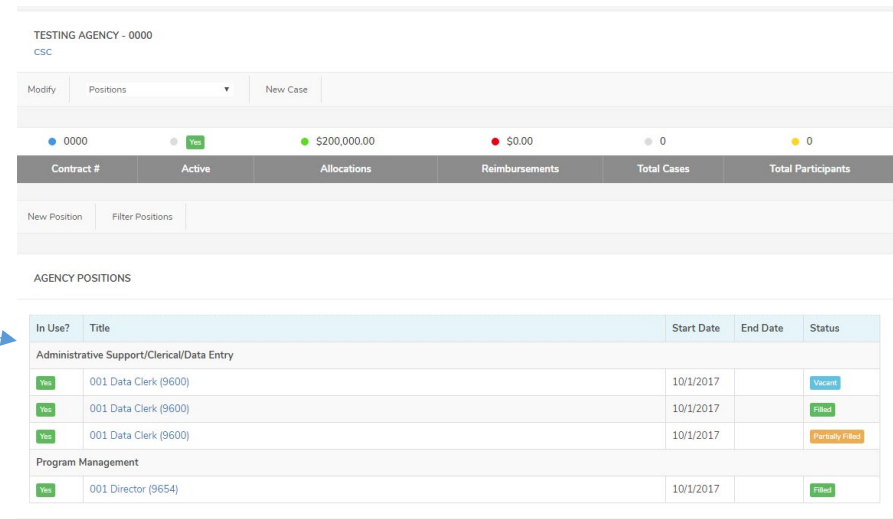
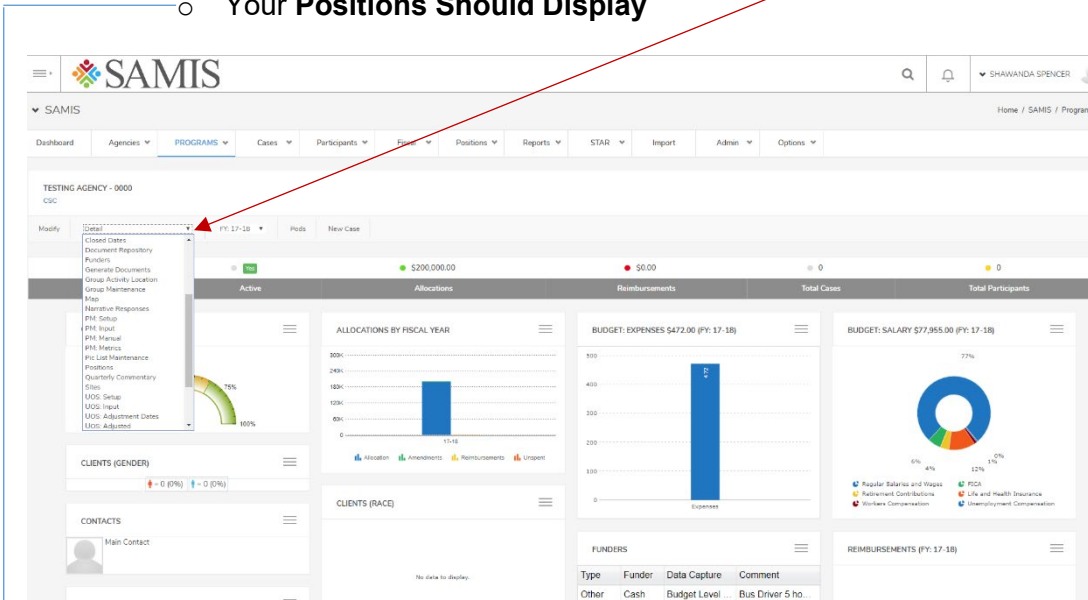
To Add Additional Positions: Click on The Program Tab, Select Recent Program and Repeat Steps on Pages 4 - 7

To Review the Positions That Were Added To The Program

- Please Click on the **Program Tab** and Select **Search**, (to search for your program)
- Click on The Appropriate **Program**, (which will bring you to the splash page of that program)
- On the Splash Page,
 - Please click on the **View/Detail Drop Down** and
 - **Select Positions** and
 - Your **Positions Should Display**



Contract Number	Agency Name	Program Name
1 0000	CSC	Testing Agency - 0000



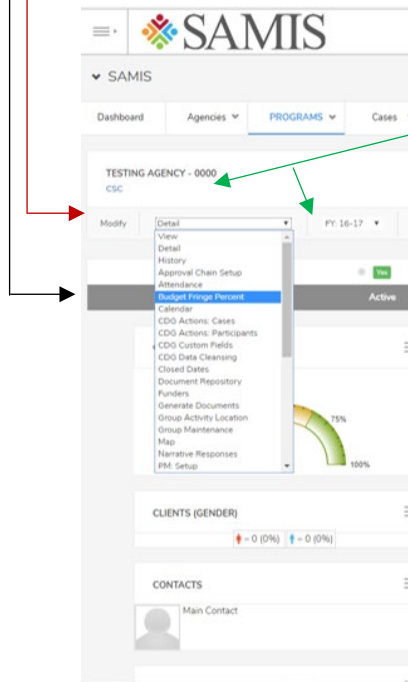
“Step 1 – Creating Position(s)” – Is Now Complete!!

Entering Budget(s) In SAMIS “Step 2 – (Entering Budget Fringe Percentages)”

- ✚ If the benefit percentage is the same for all positions then you can input a percentage which would calculate across all salaries
- ✚ If the benefit percentage “does not apply” across all positions, then enter whole dollar amounts of the benefits in the budget (step #4)

(Please note that FICA is calculated automatically at 7.65% by the system)

- From the Splash Page of SAMIS *(Please ensure that the Contract/Program and Fiscal Year are accurate)*
- Click on the **View/Detail Drop Down** and
- Select **Budget Fringe Percent**



- Enter the **Appropriate Percentage(s)** and then
- Click **Save** *(please note that FICA is calculated automatically at 7.65% by the system)*

Contract #	Active	Allocations	Reimbursements	Total Cases	Total Participants
0000	Yes	\$0.00	\$0.00	0	0

Fringe Percentages

Retirement: 0.00

Life & Health Insurance: 0.00

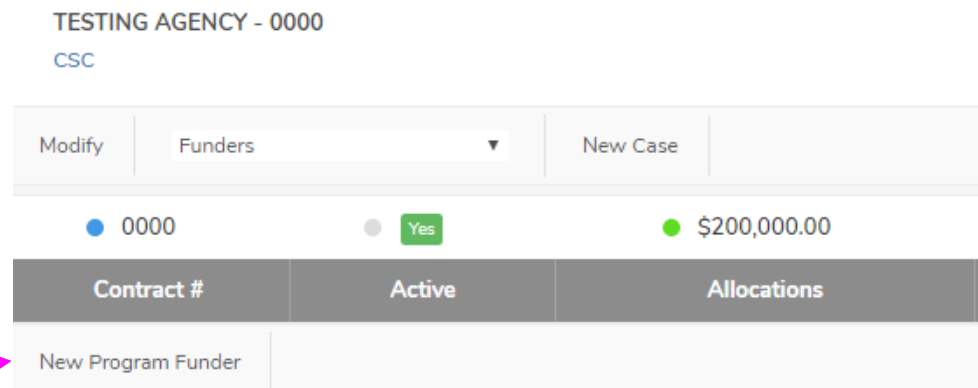
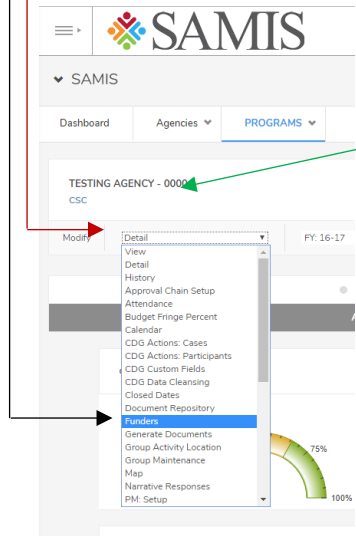
Workers Compensation: 0.00

Unemployment Compensation: 0.00

Save Cancel

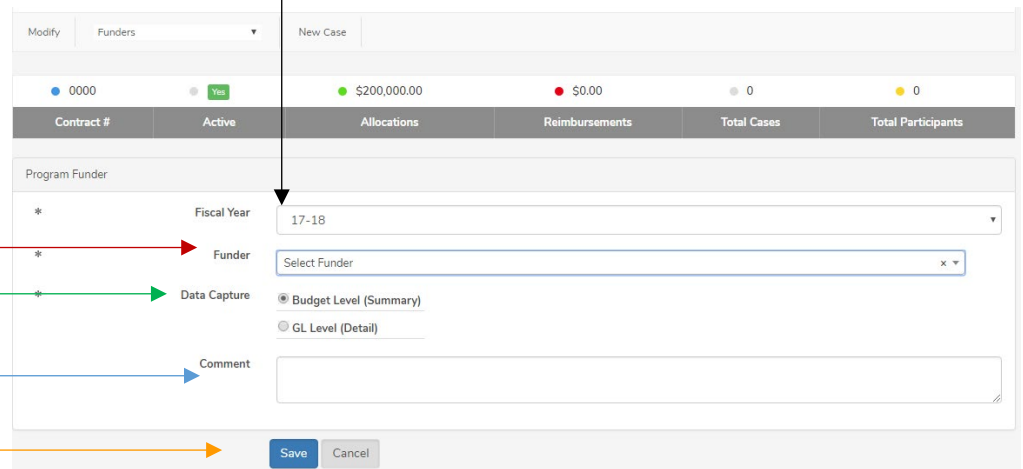
Entering Budget(s) In SAMIS “Step 3 – (Activating the Other Funding Source - Match)”

- From the Program Splash Page of SAMIS ensure that the Contract/Program and Fiscal Year are accurate
- Click on the **View/Detail Drop Down** and
- **Select Funder**



- Now click **New Program Funder Button**
- Select the appropriate **Fiscal Year**
- Select the **Funder Type**
- Data Capture select **Budget Level (Summary)**
- Comment *(Please Enter the Match Description)*
- Click **Save**

Please Repeat These Steps to Record Different Types of Match
For Example: In-Kind or Cash



Entering Budget(s) In SAMIS “Step 4 – (Creating the Budget)”

Budget(s) can only be created/edited by the Creator of the Agency Workflow

- From the **FISCAL Tab** on the Main Menu of SAMIS
 - Please select **My Approval Queue**
 - Then click on **New Approval Request Button**
 - Please select the appropriate **Fiscal Year**
 - Select the appropriate **Agency/Program**
 - Please select **Budget** in the Area field and then
 - Click **Start Request**.

The screenshot displays the SAMIS interface. At the top, the SAMIS logo is visible. Below it, a navigation bar includes tabs for DASHBOARD, Agencies, Programs, Cases, Participants, Fiscal, Positions, and Reports. The 'Fiscal' tab is selected, and a dropdown menu is open, showing options like Fiscal Documents, My Approval Queue, Adjustments, Manual Payment, Program Allocation, Document Repository, Special Conditions, Fiscal Status, Invoice Status, Manage Fiscal Year, Workflow, and Change Fiscal Year. The 'My Approval Queue' option is highlighted. Below the navigation bar, there are sections for RECENT ACTIVITY, MY FAVORITES, and MY VIEWS. At the bottom, the 'New Approval Request' form is shown with the following fields: Fiscal Year (17-18), Agency/Program (CSC - Testing Agency - 0000 (3054)), and Area (Budgets). The 'Start Request' button is located at the bottom right of the form.

Listed Below is the Summary Page for Your New Budget

❖ *Entering - “(Regular Salaries/Wages and Fringe Benefits)”*

Please Review the Following for Accuracy:

- Agency/Program Name
- Fiscal Year
- Contract #
- Allocation Amount

BUDGET #6021: TESTING AGENCY - 0000
CSC

Details Add Note Audit Trail Narrative Log 1 Move in Chain

17-18 0000 \$200,000.00 mravaziA spencerA Edit

FY	Contract #	Allocation	Last Reviewer	Next Reviewer
17-18	0000	\$200,000.00	mravaziA	spencerA

SALARY ACCOUNTS

Account #	Title	Note	Original Program Budget	Original CSC Budget	Amended CSC Budget
1	Regular Salaries and Wages		\$60,000.00	\$60,000.00	\$60,000.00
2	FICA		\$4,590.00	\$4,590.00	\$4,590.00
3	Retirement Contributions		\$3,000.00	\$3,000.00	\$3,000.00
4	Life and Health Insurance		\$9,000.00	\$9,000.00	\$9,000.00
5	Workers Compensation		\$1,050.00	\$1,050.00	\$1,050.00
6	Unemployment Compensation		\$315.00	\$315.00	\$315.00
Salary Total			\$77,955.00	\$77,955.00	\$77,955.00

To Enter Amounts, Please Click on the Individual Lines for the Applicable Expenses.

To Begin:

- Click on **Regular Salaries and Wages**

After Clicking on the Regular Salaries and Wages Link, You Should See the Assigned Positions for the Applicable Program.

17-18 0000 \$200,000.00 spencerA spencerA Rejected

FY	Contract #	Allocation	Last Reviewer	Next Reviewer
17-18	0000	\$200,000.00	spencerA	spencerA

SALARY ACCOUNT: REGULAR SALARIES AND WAGES

Pos. ID	Position	Staff	Hrs/Wk	% of Time	Salary Wages	Salary Alloc	Program Fringe	CSC Fringe
9600	001 Data Clerk	Betty Davis (2171), Betty Davis (2171), ()	40	50	\$20,000.00	\$20,000.00	\$5,985.00	\$5,985.00
9654	001 Director	Joanne Smith (2189)	40	100	\$40,000.00	\$40,000.00	\$11,970.00	\$11,970.00
Regular Salaries and Wages Total					\$60,000.00	\$60,000.00	\$17,955.00	\$17,955.00

To Enter Salaries Against an Assigned Position(s):

- Please Click on the **Position Hyper-Link** and follow the steps on the next page.

➤ Step 1: Please Enter the Budgeted **Annual Salary Amount and Benefits in the Gross Column**,

- Then Click the Calculate Button. *This will automatically populate the amount allocated to FICA and any other benefits; noted with a % rate previously defined in the Cal % Column.*

➤ Step 2: If Benefits Were Not Previously Defined in the Cal % Column, Please Click in the Gross Column to Enter the Budgeted Amounts Manually.

- Step 3: Once you have completed entering the amounts in the gross column, for those position(s) previously defined with a %, **please continue by manually entering the amounts displaying in the program allocation column into the CSC allocation column** (*these amounts were populated when you clicked on the calculate button in step 1*). All manually entered amounts that were not previously defined in the Cal % column should be entered into both the program and CSC allocation columns.

- Step 4: Once You Have Entered All the Data Then **Please Confirm that the Totals Agree** and then
 (For Percentage of Time in The Program Less than 100% Please see the Note Listed Below)
- Click **SAVE Salary Detail**.

- *For those with Multiple Positions. After Saving, Please Click on The Go to Drop Down Box to Proceed to The Next Position*

Budget #5996: Testing Agency - 0000 - Ileana

FY: 17-18 Contract #: 0000 Allocation: \$78,427.00 Creator: iblancoA Edit

My Approval Queue > Budget #5996 > Salary Account: Regular Salaries and Wages > Position: 001 Data Clerk

POSITION #9600: 001 DATA CLERK

Staff Maggie Brown
 Expected Hrs/Week 40
 % Time In Program 100
 * Weeks Funded 52

Narrative

POSITION EXPENSES Calculate

Account	Cal %	Gross	Program Allocation	CSC Allocation
Regular Salaries and Wages		5400.00	5,400.00	5400.00
FICA (7.65%)		413.00	413.00	413.00
Retirement Contributions		0.00	0.00	0.00
Life and Health Insurance		0.00	0.00	0.00
Workers Compensation	1.75 %	95.00	95.00	95.00
Unemployment Compensation		146.00	146.00	146.00
Total Fringe		\$654.00	\$654.00	\$654.00

After Saving, Go To Position #9600: 001 Data Clerk

Save Salary Detail Back to Position List

Please Note: Only in This Case If Percentage of Time in The Program Is Less Than 100%, The Gross Column Must Show the Gross At 100% For the Calculation to Be Effective. To Gross Column Will Be Different but the Program and CSC Allocation Columns Must Agree.

The print screen below the drop-down menu lists all the positions assigned to the budget. After entering all the data pertaining to the salaries and benefits, select the **BACK to POSITION LIST** button, and you will go back to the Salary and Wages summary.

POSITION EXPENSES Calculate

Account	Cal %	Gross	Program Allocation	CSC Allocation
Regular Salaries and Wages		5400.00	5400.00	5400.00
FICA (7.65%)		413.00	413.00	413.00
Retirement Contributions		0.00	0.00	0.00
Life and Health Insurance		0.00	0.00	0.00
Workers Compensation	75 %	95.00	95.00	95.00
Unemployment Compensation		146.00	146.00	146.00
Fringe		\$654.00	\$654.00	\$654.00

Budget Summary Page

- Salary Account: 1 - Regular Salaries and Wages
- Salary Account: 2 - FICA
- Salary Account: 3 - Retirement Contributions
- Salary Account: 4 - Life and Health Insurance
- Salary Account: 5 - Workers Compensation
- Salary Account: 6 - Unemployment Compensation
- Position #9600: 001 Data Clerk
- Position #9598: 001 Director
- Position #9599: 002 Case Managers

After Saving, Go To

Save Salary Detail
Back to Position List

➤ Please Review Positions and Budget Amounts to Ensure That the **Totals Agree**.

Agencies | Programs | **Fiscal** | Positions | Reports | Options

Details | Add Note | Audit Trail | Narrative Log 0

Budget #5996: Testing Agency - 0000 - Ileana

FY: 17-18 | Contract #: 0000 | Allocation: \$78,427.00 | Creator: iblancoA | Edit

My Approval Queue > Budget #5996 > Salary Account: Regular Salaries and Wages

SALARY ACCOUNT: REGULAR SALARIES AND WAGES

Pos. ID	Position	Staff	Hrs/Wk	% of Time	Salary Wages	Salary Alloc	Program Fringe	CSC Fringe
9600	001 Data Clerk	Maggie Brown (2173)	40	100	\$5,400.00	\$5,400.00	\$654.00	\$654.00
9598	001 Director	Adam Smith (2170)	40	100	\$11,667.00	\$11,667.00	\$2,282.00	\$2,282.00
9599	002 Case Managers	Betty Davis (2171), Charlie Brown (2172)	40	100	\$21,600.00	\$21,600.00	\$12,104.00	\$12,104.00
Regular Salaries and Wages Total					\$38,667.00	\$38,667.00	\$15,040.00	\$15,040.00

COMMENT

Director \$4667* 10 months*25% =
 Case Managers 2pp*20.00*15 hr*36 yrs =
 Data Clerk 15 hrs x \$10 X 36 yrs

Save Narrative
Back to Summary

➤ Please Record a Brief Description of the Fringe Benefits that were not previously defined in the **Comment Box**.

❖ **Entering - “(Other Expense(s) Line Items)”**

- Click on the applicable expense title by clicking on the title in blue (for this example: Expenses – Local or Out of Town Staff Travel – 1200)

EXPENSE ACCOUNTS

Account #	Title	Original Program Budget	Original CSC Budget	Amended CSC Budget
0000	Group Counseling Participants	\$0.00	\$0.00	\$0.00
0001	Group Community Service Participants	\$0.00	\$0.00	\$0.00
0002	Group Support/Training/Coaching Participants	\$0.00	\$0.00	\$0.00
0003	Group Restorative Justice Participants	\$0.00	\$0.00	\$0.00
1000	Expenses - Staff Training - 1000	\$0.00	\$0.00	\$0.00
1111	School Is Cool	\$0.00	\$0.00	\$0.00
1200	Expenses - Local or Out of Town Staff Travel - 1200	\$0.00	\$0.00	\$0.00
1300	Expenses - Contractual Services - Consultant - Prof Fees - 1300	\$0.00	\$0.00	\$0.00

FY: 17-18 Contract #: 0000 Allocation: \$78,427.00 Creator: iblancoA Edit

My Approval Queue > Budget #5996 > Expense Account: Expenses - Local or Out of Town Staff Travel - 1200

EXPENSE ACCOUNT: EXPENSES - LOCAL OR OUT OF TOWN STAFF TRAVEL - 1200

Narrative	1	Case Managers .45 x 100 p/mo x 12	\$1,080.00
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Expense Amount or Calculation

You can enter an expense amount or a calculation.
Calculation Sample (5 - 3) * 2 + 7
The amount will be rounded to the nearest dollar.
There is **no** need to enter an "equal" sign before the calculation.

1080

Calculation Result \$1,080.00 Program Budget

Amount Funded by CSC 1080.00

After Saving, Go To 1200 - Expenses - Local or Out of Town Staff Travel - 1200

Save Expense Back to Summary

In the **Narrative** box please enter a detail description for the expense category calculation.

Enter the Budget Amount into the **Calculation** box (you do not have to enter a formula). The **Calculation Result** and **Amount Funded by CSC** will be calculated automatically, please do not hit enter and then click Save Expense.

For Multiple Expenses, you may select the next expense line to enter data by clicking on the **After Saving, Go To** Drop Down Tab.

Upon completion of all data entry for all expense line items, Click **Save Expense**, then **Back to Summary** to go back to the Budget Summary Page.

Prior to moving onto the match entry, please ensure that expense totals for All Three Columns agree. Also, ensure that the GRAND TOTALS agree and are accurate for the budget.

9227	Job Placement Services - 9227	\$0.00	\$0.00	\$0.00
9232	Youth Development - 9232	\$0.00	\$0.00	\$0.00
9250 -	21st Century After School	\$0.00	\$0.00	\$0.00
9251	21st Century 2nd Site/Non-School - 9251	\$0.00	\$0.00	\$0.00
9252	21st Century 3rd Site - 9252	\$0.00	\$0.00	\$0.00
9275	Individual Computer Instruction - 9275	\$0.00	\$0.00	\$0.00
Expense Total		\$24,720.00	\$24,720.00	\$24,720.00
Grand Total		\$78,427.00	\$78,427.00	\$78,427.00

FUNDER(S)

Available Summary Funder(s)

Funder Grand Total \$0.00

Save Delete Forward

- ❖ Now that the Totals Agree and are Accurate,
 - ❖ To Enter the Match Please Click on the **Blue Title Labeled Available Summary Funder(s).**
 - ❖ Then **Enter the Total Amount(s)** along with a **Detail Description of the Component(s).**
 - ❖ Upon completion, **Click SAVE**, to be rerouted back to the Budget Summary Page.

FUNDER(S)

Available Summary Funder(s)

To include a Funder, simply enter the total next to the funder in the box provided.

Type	Total
Other - Cash	2,750.00
Bus Driver 5 hours x 5 days x 10 weeks x \$11 p/ hr	\$2,750.00
Other - In-Kind	1,680.00
Transportation School bus \$.56 p/m x 300 miles	\$1,680.00
Summary Funder Total	\$4,430.00
Funder Grand Total	\$4,430.00

Save Delete Forward

Please review budget totals for all columns to ensure that they equal to the allocation that is located at the top of the page and if applicable, please ensure the accuracy of your Funder Grand Total

Budget #6000: Testing Agency - 0000 - Ileana

FY: 17-18 Contract #: 0000 Allocation: \$78,427.00 Creator: iblancoA [Edit](#)

9227	Job Placement Services - 9227	\$0.00	\$0.00	\$0.00
9232	Youth Development - 9232	\$0.00	\$0.00	\$0.00
9250 -	21st Century After School	\$0.00	\$0.00	\$0.00
9251	21st Century 2nd Site/Non-School - 9251	\$0.00	\$0.00	\$0.00
9252	21st Century 3rd Site - 9252	\$0.00	\$0.00	\$0.00
9275	Individual Computer Instruction - 9275	\$0.00	\$0.00	\$0.00
Expense Total		\$24,720.00	\$24,720.00	\$24,720.00

Grand Total	\$78,427.00	\$78,427.00	\$78,427.00
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FUNDER(S)

[+ Available Summary Funder\(s\)](#)

Funder Grand Total	\$4,430.00
---------------------------	-------------------

[Save](#) [Delete](#) [Forward](#)

- ❖ If everything is accurate, and you are not ready to forward the budget click **Save**.
 - *(Save will save the data and it leaves the budget in your queue to be forwarded later)*
- ❖ If there is a mistake that requires the budget to be deleted click **Delete**.
 - *(Delete will delete the budget). The system allows for line item modification; click on the blue hyperlink for the appropriate line item.*
- ❖ If totals are accurate, and you are ready to forward the budget to the next person in the approval chain click **Forward**.
 - *(Forward will save the data and forward the budget out of your queue to the next person for review and/or submission.*

Please Note:

Once the budget has been forwarded to either the Reviewer and/or Submitter, if a mistake is discovered the Reviewer and/or the Submitter should click reject, which will send the budget back to the Creator to make the necessary adjustments.

The Creator is the only person who can create and/or edit the budget.

!! If no changes are required, please continue to forward the budget until it reaches the Submitter, who will submit the budget to the CSC!!

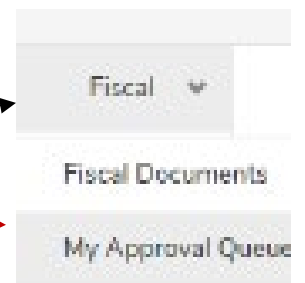
❖ **Entering budget - “(***)multiple ways of accessing a pending budget(***) - reviewers and/or submitters)”**

- From the Main Dashboard, Please **Click on the Program Name in Blue**



OR

- ❖ From the Main Dashboard of SAMIS, Please Click on the **Fiscal Tab** and then
 - Select **My Approval Queue**



Please Note:

- ❖ When a budget is in **Edit** mode, that means that it is still on the Agency side of SAMIS and is still able to be rejected by the Agency to allow for corrections.
- ❖ When it is **Submitted**, that means that it is on the CSC side and can still be rejected by the CSC to allow for corrections.
- ❖ When a budget is **Approved**, no additional corrections are allowed.

To Locate a Budget, Please Use the Audit Trail: (You Can Always Review the Audit Trail of a Created/Submitted/Approved Budget)

- Click on the **Fiscal Tab**
- Select **Fiscal Documents**
- Click on the **Fiscal Budget** to Open It Up and then
- Click on the **Audit Trail Button** located on the Top Left of Your Screen

SAMIS Add New

Agencies Programs **Fiscal** Positions Reports Options

Details Audit Trail Narrative Log 0

Budget #5996: Testing Agency - 0000 - Ileana

FY: 17-18 Contract #: 0000 Allocation: \$78,427.00 Last Reviewer: iblancoA Next Reviewer: iblanco Submitted

My Approval Queue > Budget #5996

Page 1 of 1 Records per page: 100 Displaying 1 to 3 of 3 items.

Drag a column here to group by that column

	Action	Note	Full Name	Date
1	Create	iblancoA created document	Ileana Blanco	05/25/17 12:40 PM
2	Forward	iblancoA forwarded document to iblancoA	Ileana Blanco	05/25/17 02:46 PM
3	Submit	iblancoA submitted document to CSC for approval	Ileana Blanco	05/25/17 02:49 PM

ADDENDUM

Copy Previous Budget – If the previous year’s budget in SAMIS is similar to your new budget you may copy. Copying a previous budget will copy all budget information including narratives. This is intended to save data entry time. Before a budget can be copied, an allocation for the upcoming year must be input by the CSC. Only positions that are active during the time period of the new budget will be copied and displayed in the new budget. All GL items active at the time of budget creation will be added to the copied budget; GL items appearing on the original budget that are inactive during the time the budget is created will not appear on the copied budget.

To use the Copy function, please see the instructions on Page 21.

Entering Budget(s) In SAMIS – (Copying the Budget)”

Budget(s) can only be created/edited by the Creator of the Agency Workflow

- From the **FISCAL Tab** on the Main Menu of SAMIS
 - Please select **My Approval Queue**
 - Then click on **New Approval Request Button**
 - Please select the appropriate **Fiscal Year**
 - Select the appropriate **Agency/Program**
 - Please select **Budget** in the Area field
 - Select **Yes** to Copy Previous Budget and then
 - Click **Start Request**.

The screenshot shows the SAMIS main menu with the 'Fiscal' tab selected. The 'My Approval Queue' dropdown menu is open, showing options such as 'Fiscal Documents', 'Adjustments', 'Manual Payment', 'Program Allocation', 'Document Repository', 'Special Conditions', 'Fiscal Status', 'Invoice Status', 'Manage Fiscal Year', 'Workflow', and 'Change Fiscal Year'. The 'Manage Fiscal Year' option is currently selected, showing a value of '18-2589'.

The screenshot shows the SAMIS main menu with the 'FISCAL' tab selected. The 'New Approval Request' button is highlighted in the bottom left corner of the menu.

The screenshot shows the 'New Approval Request' form with the following fields:

- Fiscal Year ***: 17-18
- Agency/Program ***: Shawanda Testing Agency - After School - 00-0000 (174)
- Area ***: Budgets
- Copy Previous Budget? ***: Yes No

At the bottom of the form, there are two buttons: 'Start Request' and 'Cancel'.

BUDGET #6478: AFTER SCHOOL - 00-0000
Shawanda Testing Agency

Details | Add Note | Audit Trail | Narrative Log 0

17-18 ● \$100,000.00 ● sspencerA Edit

FY	Contract #	Allocation	Creator	Status
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SALARY ACCOUNTS

Account #	Title	Note	Original Program Budget	Original CSC Budget	Amended CSC Budget
1	Regular Salaries and Wages		\$15,500.00	\$15,500.00	\$15,500.00
2	FICA		\$1,187.00	\$1,187.00	\$1,187.00
3	Retirement Contributions		\$550.00	\$550.00	\$550.00
4	Life and Health Insurance		\$0.00	\$0.00	\$0.00
5	Workers Compensation		\$0.00	\$0.00	\$0.00
6	Unemployment Compensation		\$0.00	\$0.00	\$0.00
Salary Total			\$17,237.00	\$17,237.00	\$17,237.00

Budget amounts may exceed the program allocation while being edited by the budget creator. However, the CSC allocation total on the budget must be equal to, or less than the program allocation when the budget is forwarded.

EXPENSE ACCOUNTS

Account #	Title	Note	Original Program Budget	Original CSC Budget	Amended CSC Budget
1000	Expenses - Staff Training - 1000		\$0.00	\$0.00	\$0.00
1111	School Is Cool		\$0.00	\$0.00	\$0.00
1200	Expenses - Local or Out of Town Staff Travel - 1200		\$500.00	\$500.00	\$500.00
1300	Expenses - Contractual Services - Consultant - Prof Fees - 1300		\$0.00	\$0.00	\$0.00
1400	Expenses - Space & Utilities - 1400		\$0.00	\$0.00	\$0.00
1500	Expenses - Equipment - more than \$750 per item - 1500		\$0.00	\$0.00	\$0.00
1600	Expenses - 1600		\$0.00	\$0.00	\$0.00

9224	Before School Day - 9224		\$0.00	\$0.00	\$0.00
9232	Individual Youth Development - 9232		\$0.00	\$0.00	\$0.00
9250	21st Century - AfterSchool - 9250		\$0.00	\$0.00	\$0.00
9251	21st Century - NonSchool Day - 9251		\$0.00	\$0.00	\$0.00
Expense Total			\$6,763.00	\$6,763.00	\$6,763.00

Grand Total			\$24,000.00	\$24,000.00	\$24,000.00
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Save Delete Forward

GLOSSARY of TERMS:

Fiscal Year: The CSC fiscal year (FY) is the 12-month period that runs from October 1 each year through September 30 of the following year. For example, the FY18-19 is the period that covers October 1, 2018 through September 30, 2019.

Budget Period: The budget period is usually similar to the fiscal year.

Contract period: This is the term or duration of the CSC program agreement.

Contract number: A number assigned by the CSC to the contract. This number changes at the start of a new RFP period.

Position: A position is the job held by the employee/staff within the agency.

Position title: This is the title of the job held by the staff. For example, Program Coordinator, Teacher, Youth Counselor, and Administrative Assistant.

Position start date: This is the **start date of the fiscal year** for which the position was created in SAMIS. For example, we will use 10/1/2018 for all positions created for FY18-19 and 10/1/2019 for positions created for FY19-20 and so on.

Position end date: This field is to be **left BLANK** at the time the position is created.
(Whenever the position is no longer needed by the Agency then this field should be completed.)

Support start date: This is the date the position began in the CSC program and is usually the same date as the **contract start date**.

Support end date: This is the date the job ends in the CSC program and this field is to be **left BLANK at the time the support is assigned**. Note that the contract number changes at the start of a new RFP period, therefore positions must be assigned to the program at the start of each new RFP. When the position no longer supports the program, the actual support end date should be put in this field.

Assignment start date: This is **the date the individual staff was assigned** to the position in the program.

Assignment end date: This field is to be **left BLANK** at the time the staff is assigned.
(When there is a change in staff we should close out the assignment at the date of staff change and assign a new individual/staff name.)

Paraprofessional staff: A paraprofessional staff is a non- degreed staff and includes staff with Associates or lower.

Professional staff: A professional staff is the holder of a professional license, a Bachelor's degree or higher.

Full-time staff (FT): An employee who is considered full-time to the **agency** and usually works 40 hours or more per week.

Part-time staff (PT): An employee who is part-time to the **agency** and usually works 30 hours or less per week.



Children's Services Council of Broward County
954-377-1000

Visit us online www.cscbroward.org | Follow us on social media [@cscbroward](https://twitter.com/cscbroward)

