



COPY BUDGET(S) IN SAMIS 3.0

Presented by the Finance Department



Before you get started

Copy Previous Budget – If the previous year's Budget in SAMIS is similar to your new Budget, you may copy it. Copying the prior year's Budget will copy all budget information, including narratives. This is intended to save data entry time. Before a budget can be copied, the CSC must input an allocation for the upcoming year. Only positions that are active during the 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 were inactive when the Budget was created will not appear on the copied Budget.

The Copy Budget Entry Process:

- | | |
|---|--------|
| 1. Define Fringe Benefits % Rate | Pg. 3 |
| 2. Assign Funders – Match and or Leverage if applicable | Pg. 7 |
| 3. Position Management | Pg. 10 |
| 4. Populate the budget template and enter the Budget | Pg. 17 |

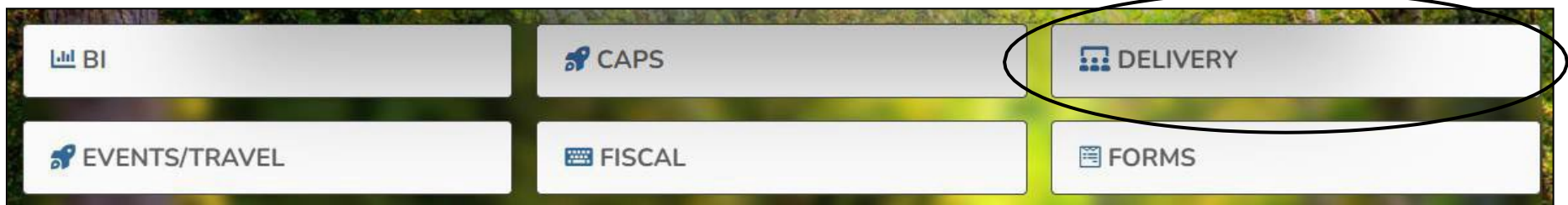


<https://www.nexuscscbroward.org/>

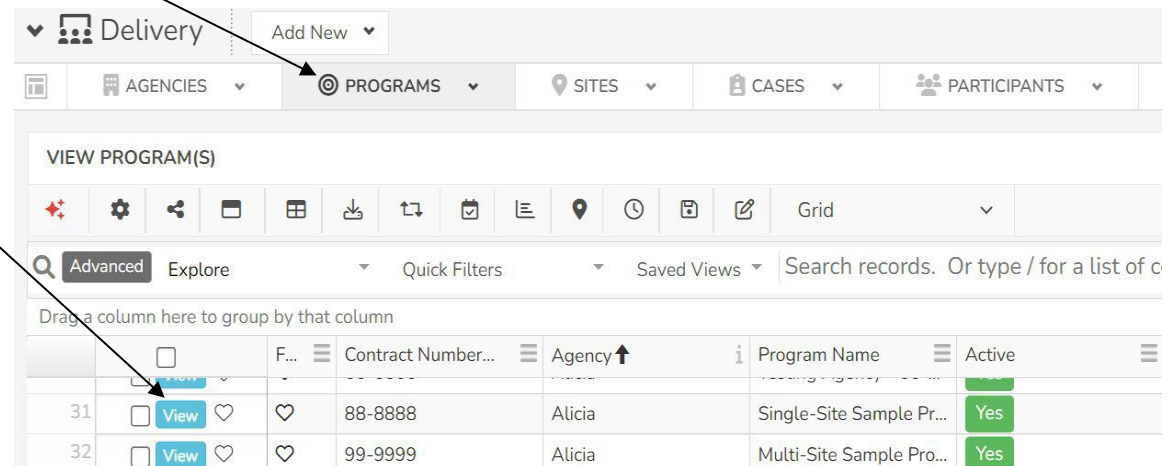
STEP 1. Define Fringe Benefits % Rates (Delivery Module)

FICA is auto-populated in the Budget; therefore, **FICA** is not part of the fringe benefits described here. The fringe benefits are retirement, health insurance, worker's compensation (WC), and SUTA. Only enter % rates for fringe benefits calculated by multiplying the % rate X gross salary across ALL positions in the Budget. For the most part, **WC** will be the only fringe benefit to apply, but there are some exceptions.

- To define the fringe benefits % rates, begin by selecting the **DELIVERY** module



- From the main navigation menu, select **PROGRAMS**
Select your Program
(agencies with multiple programs).






STEP 1. Define Fringe Benefits % Rates (Delivery Module)

- To assign a fringe benefit, click on the **Create New** button
Then **GL Fringe Percentages**

SINGLE-SITE SAMPLE PROGRAM 88-8888

Program Details

 Program Details 

Create New ... 

Create New ...

Cases


Files/Document Repository


Fiscal Document

Funder

GL Fringe Percentages

Participant

 Pods

3347	Alicia	88-8888
 ID	Agency	Contract Number

STEP 1. Continued – Defining Fringe Benefits %

- Select your **Fiscal Period**

Fiscal Period

- Select the Fringe Benefit **GL**

GL

- Enter the **Fringe %** rate

- up to 2 decimal points

- no % sign needed

e.g., 2.36% = 2.36

Fringe %

- **Before you click save,**
select your next move
from the dropdown,
then click **Save!**

See the next page

After Saving, Go To

Program Detail Page

Program Detail Page

Modify Page

GL Fringe Percentages Detail

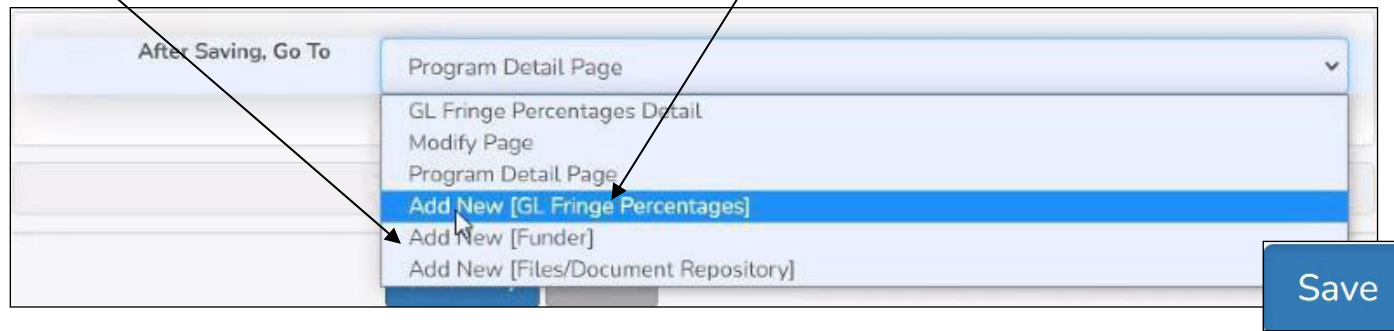
Add New [GL Fringe Percentages]

Add New [Funder]

Add New [Files/Document Repository]

STEP 1. Continued – Defining Fringe Benefits %

- The efficiency dropdown menu provides the ability to **assign a second fringe benefit % rate** or select **Add New [Funder]**, or next step; if no other rate needs to be recorded. Select and then click Save Entry.



Assigning a rate to a fringe benefit allows SAMIS to calculate the cost of the benefit by providing a Calculate button under Regular Salaries and Wages > Position in the body of the Budget.

If rates are not assigned in the benefits module, **you will not have a Calculate button** when recording salaries and fringe benefits, which would have automatically calculated the cost of the fringe benefits. The cost of the wages and fringe will need to be entered manually into the body of the Budget.

If recording an additional fringe benefit % rate, follow the steps described above in Step 1.

STEP 2. Assign Funders – *The Match and or Leverage* (Delivery Module)

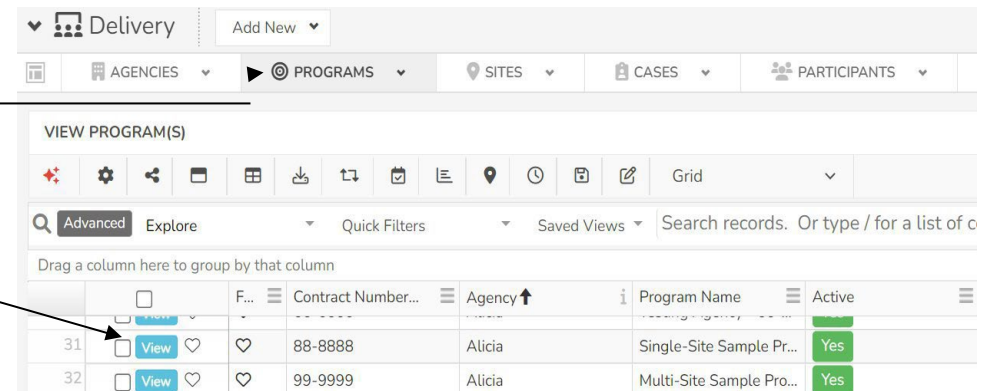
Review your budget detail to note the type of funders to assign to the SAMIS budget entry - Cash, In-Kind, and or Leverage.

➤ DELIVERY Module

From the main navigation menu, select **PROGRAMS**

Select your Program

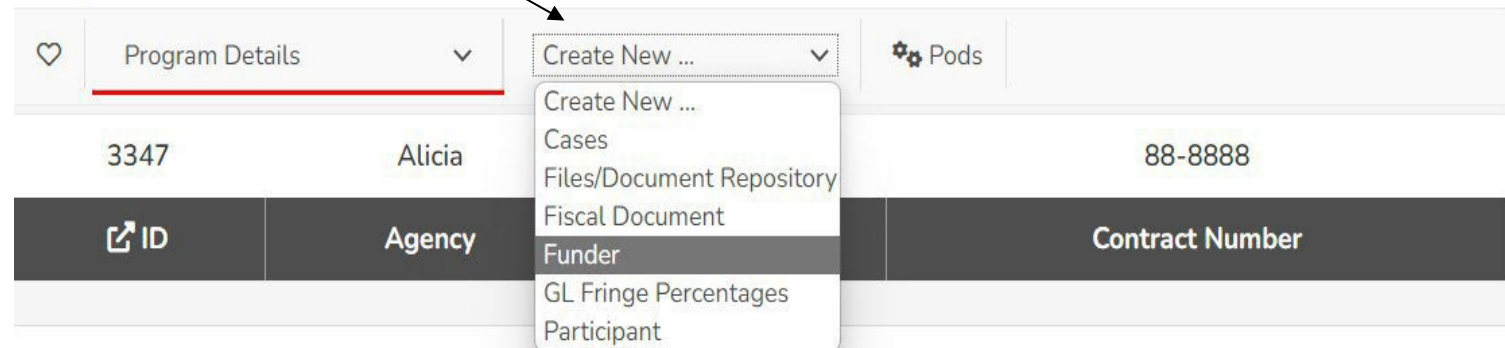
(agencies with multiple programs).



		F...	Contract Number...	Agency ↑	Program Name	Active
31	View	♥	88-8888	Alicia	Single-Site Sample Pr...	Yes
32	View	♥	99-9999	Alicia	Multi-Site Sample Pro...	Yes

- To assign a funder, click on the **CREATE NEW** button. Then **FUNDER**

SINGLE-SITE SAMPLE PROGRAM 88-8888
Program Details



ID	Agency	Contract Number
3347	Alicia	88-8888

STEP 2. Assign Funders – *The Match and or Leverage* (Delivery Module)

- Select the **Funder/Leverage** → **Funder**
- Select **Program Period** → **Program Period**
- Select the radio button for **Budget (Summary)** → **Funder Level**
- Select the Active radio button for **Yes** → **Active**
- In the **Comment** box, briefly describe components of the Match (1-3 words max); the full description comes later. → **Comment**

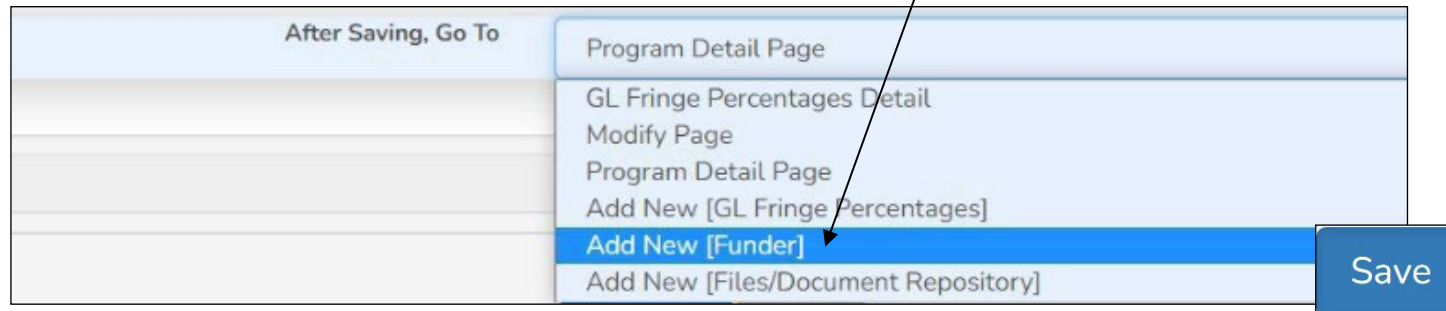
The screenshot shows a form with the following fields and options:

- Select Funder**: A dropdown menu with a blue border. A line points from the 'Funder' label in the instructions to this field. The dropdown is open, showing options: **Cash** (highlighted in blue), **In-Kind**, **Leverage**, and **Match**.
- Select Fiscal Period**: A text input field.
- Funder Level**: Two radio buttons. The first is selected and labeled **Budget (Summary)**. The second is labeled **GL (Detail)**.
- Active**: Two radio buttons. The first is selected and labeled **Yes**. The second is labeled **No**.
- Comment**: A large text area for entering a comment.

STEP 2. Continued – Assigning Additional Funder - *The Match*

- The efficiency dropdown menu allows assigning a second funder type and or adding **Leverage**.

First, select *Add New [Funder]*, then click Save.



The screenshot shows a web interface with a dropdown menu. The menu is titled "After Saving, Go To" and contains the following options: "Program Detail Page", "GL Fringe Percentages Detail", "Modify Page", "Program Detail Page", "Add New [GL Fringe Percentages]", "Add New [Funder]", and "Add New [Files/Document Repository]". The "Add New [Funder]" option is highlighted in blue. An arrow points from the text "First, select *Add New [Funder]*, then click Save." to this option. To the right of the dropdown menu is a blue button labeled "Save".

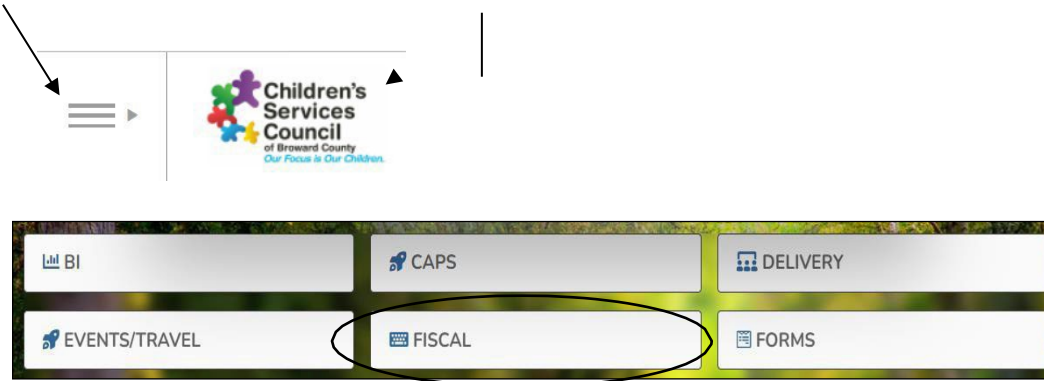
After Saving, Go To
Program Detail Page
GL Fringe Percentages Detail
Modify Page
Program Detail Page
Add New [GL Fringe Percentages]
Add New [Funder]
Add New [Files/Document Repository]

Save

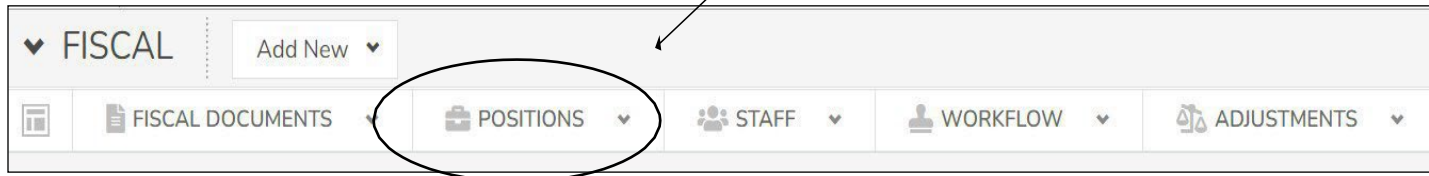
- If adding another Match or Leverage, follow the steps described above in STEP 2.

STEP 3. Position Management

Step 3 requires us to move from the DELIVERY module to the **FISCAL module**. You can make the transition by clicking on the hamburger icon **or** the CSC logo in the upper left-hand corner of your screen and selecting FISCAL.



On the main navigation menu, click on the **POSITIONS** tab.



You will see all your current and past positions and staff members in the Results List. Click on any of the columns heading to sort by that column.

		Active Programs ↓	First Nam...	Last Na...	Active Positions	Date Created
1	<input type="checkbox"/> View	3198: CSA Testing Agency 44-4444	Bruno	Mars	14282: Senior Programs Manager	9/11/2019
2	<input type="checkbox"/> View	3198: CSA Testing Agency 44-4444	John	Brown	14288: Counselor	9/18/2019
3	<input type="checkbox"/> View	3198: CSA Testing Agency 44-4444	Kirk	Dasos	14288: Counselor	6/25/2020
4	<input type="checkbox"/> View	3164: Testing Agency - 33-3333 319...	Janet	Jackson	13823: Therapist 14289: Program Assistant	9/11/2019
5	<input type="checkbox"/> View	3164: Testing Agency - 33-3333	Elan	Rusk	13822: Seniors Programs Manager	6/25/2020

- ❖ A good starting point is the previous fiscal year budget in SAMIS. Review the position titles and assigned staff. Do they match your new budget staffing chart in your Scope of Work? If all your positions match, proceed to Copy Budget ([Go to Pg.18](#)). If not, see below for how to update Position Management.

The position title is not an exact match:

Do not modify past position titles; historical data is important to CSC. The old position's **staff, assignment, and position** must be **end-dated**. The new title creates a new position ([Go to Pg. 13](#)). The old position becomes inactive in the *position library* or may be used by other programs within the Agency.

The title matched, but the % allocation changed and or the staff has changed:

The position's staff member will need to be end-dated, and the position's new % allocation and staff member, if known. ([Go to Pg. 16-17](#)).

The position is not in the prior year's Budget:

First, review the Agency's *position library, as shown on page 11*; it may be available. If the position is not found, proceed to create the position ([Pg. 13](#)).

Once you have completed position management and all your positions and titles actively reflect your new fiscal year budget, you can proceed to Copy your Budget ([Go to Pg. 18](#)).

STEP 3. Position Management

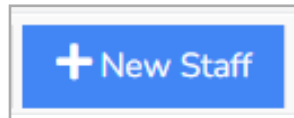
Creating Staff (Staff Tab)



Navigation bar showing: FISCAL (dropdown), Add New (button), FISCAL DOCUMENTS (tab), POSITIONS (tab), and STAFF (tab, highlighted in yellow).

Record the names of the staff members working in the Program. If a position is currently vacant, you will need to update SAMIS as you hire the staff.

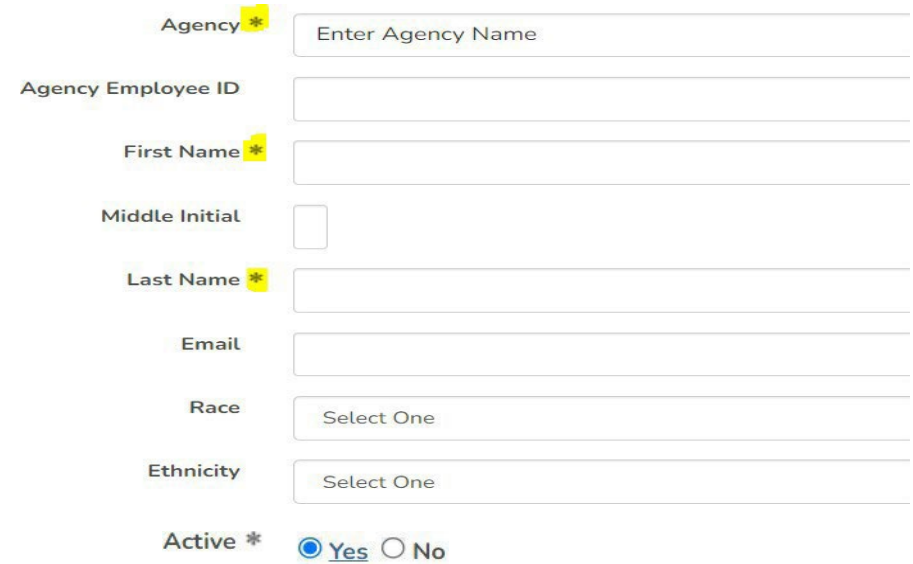
- Click the + **New Staff** button



- On the form, items marked by an * asterisk are required fields

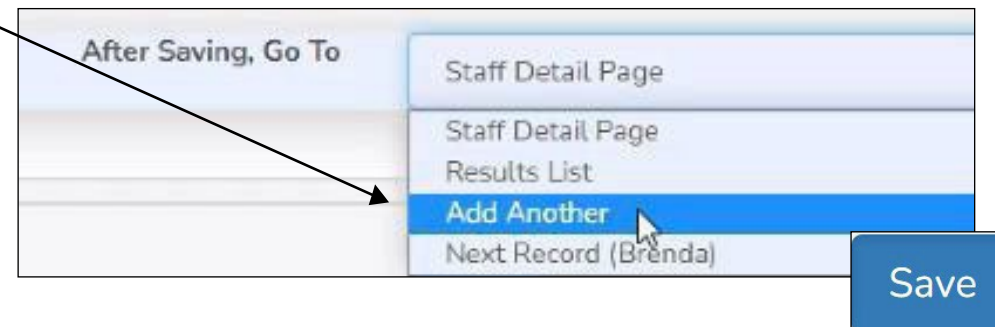
Agency, First Name, and Last Name

- Use the efficiency dropdown menu to select **Add Another** if making multiple entries. First, make your selection, then click Save.
- When all the available staff is entered, select **Results List** to review your new staff roster!



Form fields for creating a new staff member:

- Agency * (text input: Enter Agency Name)
- Agency Employee ID (text input)
- First Name * (text input)
- Middle Initial (text input)
- Last Name * (text input)
- Email (text input)
- Race (dropdown: Select One)
- Ethnicity (dropdown: Select One)
- Active * (radio buttons: Yes, No)



After Saving, Go To dropdown menu:

- Staff Detail Page
- Staff Detail Page Results List
- Add Another** (highlighted)
- Next Record (Brenda)

Save button (blue)

STEP 3. Position Management

Creating a Position (Positions Tab)

- Click on the + New Position button
- On the form, complete all sections except Position End Date
- Select your **Agency**
- Enter the **position's title** –
 - DO NOT** USE ALL CAPS
 - Capitalize Each Word
- **Category** – obtained from the contract's staffing chart
- **Type of Wage** – Salary or Hourly
- **Hours per year** – Total hours the position will work annually
 - 40 hrs. per wk. X 52 wks. per yr. = 2080 hrs.
- **Hourly Rate** – Hourly Rate
- **FT or PT**
- **Position Start Date** aligns with the contract start date.
- **Position End Date** – Do not enter a date; leave it blank
- Use the efficiency dropdown menu to select
Add Position Program Assignment
First, make your selection, then click Save.

+ New Position

Agency *	<input type="text" value="Enter Agency Name"/>
Title *	<input type="text"/>
Category *	<input type="text" value="Select One"/>
Type of Wage *	<input type="radio"/> Salary <input type="radio"/> Hourly
Hours per Year *	<input type="text"/>
Hourly Rate	<input type="text" value="\$"/>
Full or Part-Time	<input type="text"/>
Position Start Date *	<input type="text" value="📅"/>
Position End Date	<input type="text" value="📅"/>

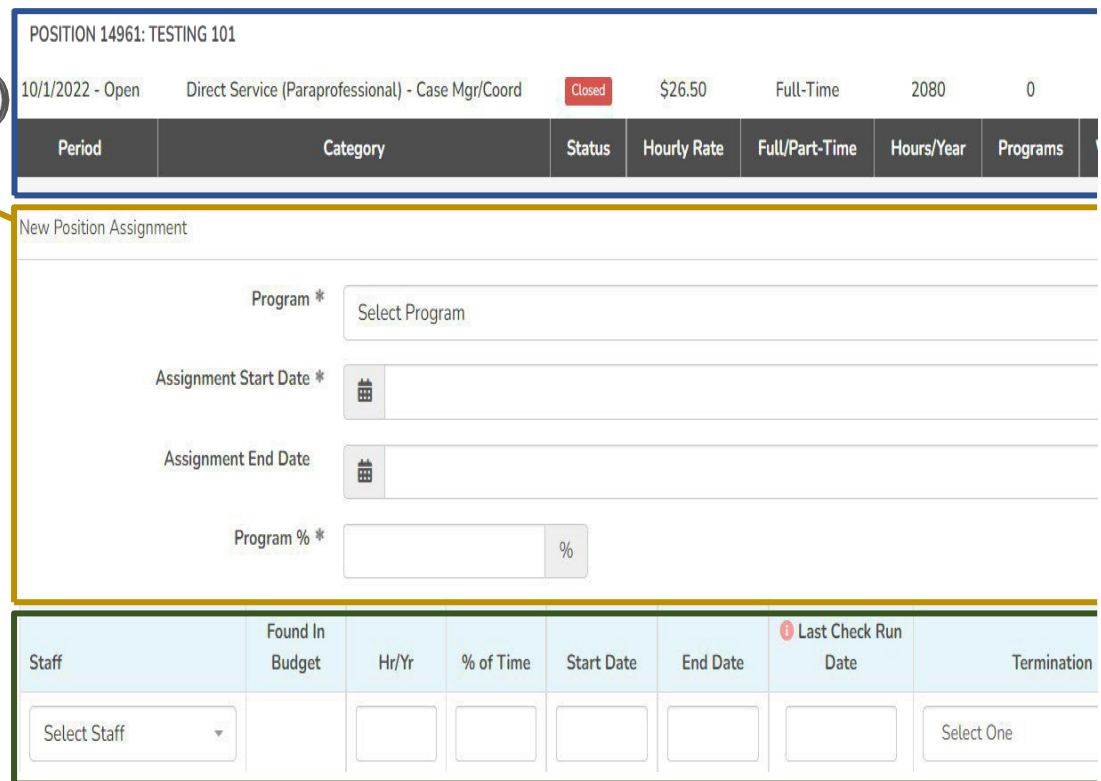
STEP 3. Position Management

Assigning a Position to a Program (Positions Tab)

- If the staff is known, you will now assign the staff member who will fill the position just created.
- For VACANT positions, the Staff fields will remain blank. We will record the newly hired staff member when the position is filled.

Program Assignment

- Select your Program
- Assignment Start Date –
same as the contract start date
- Assignment End Date –
Do not enter a date; leave blank
- Program % Allocation
up to 2 decimal points
accepted, no % sign needed
e.g., 75.2% = 75.2



POSITION 14961: TESTING 101

10/1/2022 - Open Direct Service (Paraprofessional) - Case Mgr/Coord Closed \$26.50 Full-Time 2080 0

Period	Category	Status	Hourly Rate	Full/Part-Time	Hours/Year	Programs
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New Position Assignment

Program *

Assignment Start Date *

Assignment End Date

Program % * %


Staff	Found In Budget	Hr/Yr	% of Time	Start Date	End Date	Last Check Run Date	Termination
<input type="text" value="Select Staff"/>		<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Select One"/>

Staff Assignment continues on the next page.

STEP 3. Position Management

Assigning Staff to a Program (Positions Tab)

Staff Assignment

Staff	Found In Budget	Hr/Yr	% of Time	Start Date	End Date	 Last Check Run Date	Termination
Select Staff ▼							Select One ▼

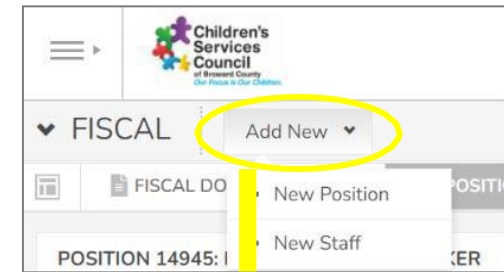
- **Select** the staff member's name from the dropdown menu. Don't see the name, see [page 12 – Creating the Staff](#)
- **# of hours per year** the **specific staff member** works annually in the Agency (40 hrs. per wk. X 52 wks. per yr. = 2080 hrs.)
- **% allocation** of the **specific staff member** hours to the position-time allocation may not be greater than 100% for any employee. SAMIS will show an alert and will require adjustment to continue.
- The **Position Start Date** is when the specific staff member is hired, promoted to, or begins to fill that position in the Program. If the Agency previously employed the staff member and is now assigned to the CSC program, the start date is when the staff member joins the Program.
- No **Position End Date** – **Do not enter a date; leave it blank.** The end date is recorded when the staff member is terminated from the Program.
- **Last Check Run Date** is required when you terminate a staff member. It is the final check run in which the staff member reports hours to the Program, and the Agency pays wages.
- **Reason for Termination** - also required when terminating an individual from the Program.

STEP 3. Position Management

Assigning Staff to a Program (Cont'd)

- Repeat the steps for all positions - **Pg. 13 Creating a Position.**

Fiscal > Positions Tab > + New Position or use the quick access

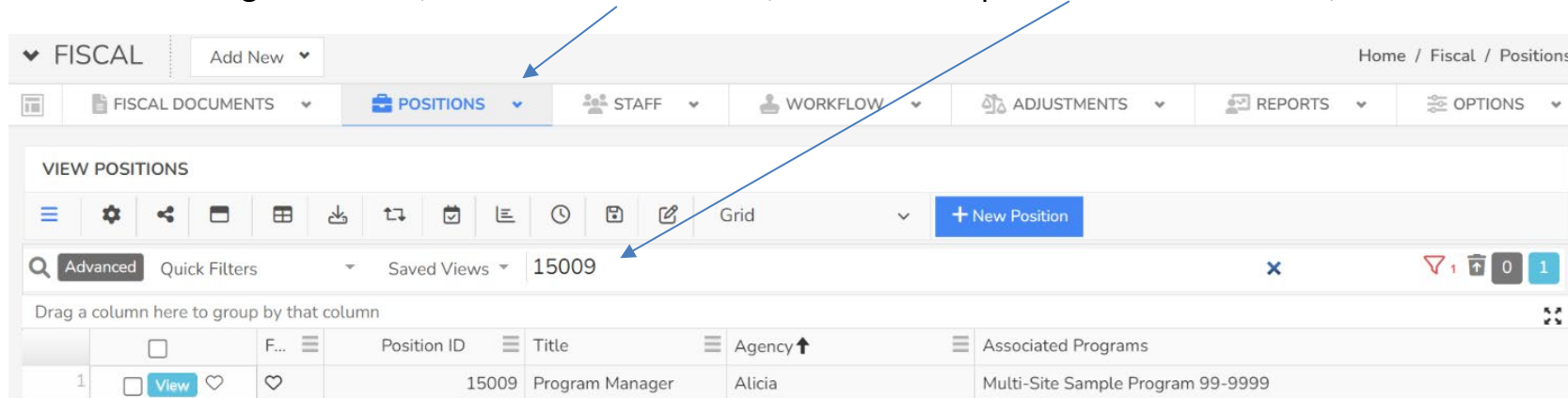


Quick Access to add a New Position or Staff

- Once all the positions are created and staff is assigned, you can review the roster by clicking on the Positions Tab
Fiscal > Positions Tab > Sort by Associated Program
- SAMIS will alert if:
 - A position is over 100% allocated across CSC programs
 - A staff member is over 100% allocated among all CSC positions
 - A notification of over-allocation must be corrected

Updating existing Position – Change of staff or Allocation

On the main navigation menu, click the POSITIONS tab, enter the unique ID for the Position ID, and select **View**.



STEP 3. Position Management

You can now modify the assignment to change the staff or allocation %.

POSITION 15009: PROGRAM MANAGER
Alicia

Modify | Details | Add Position Program Assignment

10/1/2022 - Open	Program Management	Filled	\$27.40	Full-Time	2080	1	0	
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Period	Category	Status	Hourly Rate	Full/Part-Time	Hours/Year	Programs	Warnings	Modified On
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[PROGRAM #3348] MULTI-SITE SAMPLE PROGRAM 99-9999 [View Program](#) [Modify Assignment](#)


Assig. ID	# of Staff	Program %	Assignment Period	Hrs/Year	Active Hrs/Year	Modified On
20016	1	80 %	10/01/22 - Open	1664	2080	



Staff Member	Staff %	Staff Period	Hrs/Year	Status	Termination Reason
Don Henley (ID: 6837)	80.00 %	10/01/22 - Open	2080	Active	

* If the allocation % has changed, be sure to end date the current staff and add the existing staff or new staff again with the new Allocation percentage.



Position Assignment: 20016

Program Multi-Site Sample Program 99-9999

Assignment Start Date *  10/01/2022

Assignment End Date  

Program % * %

Staff	Found In Budget	Hr/Yr	% of Time	Start Date	End Date	 Last Check Run Date	Termination
Don Henley	No	<input type="text" value="2080"/>	<input type="text" value="80"/>	10/01/2022	<input type="text"/>	<input type="text"/>	Select One 

[Add Staff Assignment](#)

STEP 4: The Budget Template & Entry (Fiscal Module)

Step 4 takes place in the **FISCAL** module. On the main navigation menu, click on **FISCAL DOCUMENTS > New Fiscal Document**



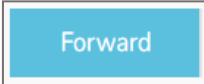
- **Fiscal period** – coincides with CSC's fiscal year
- Select your **Agency / Program**
- **Document Type** – Budget
- **Copy Budget**
- **Create Document**-populates the budget template

A screenshot of a 'New Document' form. The form has several input fields: 'Fiscal Period *' with the value '21-22', 'Agency/Program *' with the value 'Ileana - Testing Agency - 33-3333 (3164)', and 'Document Type *' with the value 'Budget'. Below these is a question 'Copy Previous Fiscal Period Budget? *' with radio buttons for 'Yes' (selected) and 'No'. At the bottom right is a blue button labeled 'Create Document'. Blue arrows from the list on the left point to each of these elements: 'Fiscal Period *', 'Agency/Program *', 'Document Type *', 'Copy Previous Fiscal Period Budget? *', and the 'Create Document' button.

Please go through the Budget in its entirety and update all verbiage and numbers as needed.

➤ Click 

➤ Congratulations, you have completed entering your Budget in SAMIS!

➤ Forward your Budget 

➤ The Budget moves to the next person on your workflow for approval. Only the Submitter can submit the Budget to CSC.

➤ Submitter can either 