⚫ SAM V2 Implementation Guide

# **The first step in implementing the Student Accommodation Manager (SAM V2) is to make sure the application is configured to meet the specific needs of your office. The information you gather as outlined in this implementation guide will allow technical staff to customize SAM V2 to the tracking needs and terminology of your office.**

### You will need to make 4 decisions in order to build your application:

**1. Users**

* **Who will be using SAM?**

**2. Roles & Permissions**

* **What will each user be allowed to do and see in SAM?**

**3. Multiple Choice Lists**

* **What information should be captured in SAM’s drop-down/multiple choice lists?**

**4. Accommodations Master List**

* **What is the master list of accommodations you would like SAM to track?**
* **What accommodation terminology does your office prefer?**

### 1

### Users ****List all the users who should have access to SAM.****

**Instructions:**

1. Provide information for each person/user that will have access to SAM: **First name, Last name**, and **Email** **address**.
   * A SAM user account will be created for each user listed.
2. Under the **Role** column, you can put any of the following: a) **Administrator,** b) **Service Provider, or** c) **Create a new role**.
   * You have the ability to create new roles. For example, **Student Workers** or **Temporary Workers** who may have limited access/permissions to the system (see ‘Roles & Permissions’ table below).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Enter user’s  first name*** | ***Enter user’s last name*** | ***Enter user’s e-mail address*** | ***Determine a login for each user (e.g., last name first initial or email address)*** | ***Enter a password for each user. Note users can change passwords later if they choose. The Admin will be able to view the passwords at any time.*** | ***Indicate either:***  ***‘Administrator’ or ‘Service Provider’ for each User; for New Role see Step 2.*** |
| **First Name** | **Last Name** | **Email Address** | **User Login** | **Password** | **Role** |
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### 2

### Roles & Permissions

**Determine what each person is allowed to do, or “permissions,” in SAM.**

Permissions in SAM are assigned based on designated roles in the system. **There are two roles predefined in SAM: Administrator and Service Provider. (Note: You can define more roles and assign users to these new roles if required.)**

The default permissions for the role of **Administrator** are to **add, view, edit** and **delete** information in each table/group of information in SAM.

The default permissions for the role of **Service Provider** are the same as Administrator except the Service Provider cannot delete items in the Accommodation Master list.

**Instructions:**

1. **Simply change the “yes” and “no” to reflect the permissions you would like for Administrator and Service Provider.** 
   * **If you wish to create a New Role, change the column title to the new role name, i.e. Student Worker, and complete the column by adding yes or no in each permission row.**

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| --- | --- | --- | --- | --- | --- | --- |
|  |  | ***‘yes’ to allow***  ***or***  ***‘no’ to forbid*** | ***‘yes’ to allow***  ***or***  ***‘no’ to forbid*** | ***Add add’l role***  ***(optional)*** | ***Add add’l role***  ***(optional)*** | ***Add add’l role***  ***(optional)*** |
| **Table** | **Permission** | **Administrator** | **Service Provider** | **New Role 1** | **New Role 2** | **New Role 3** |
| Students | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Disabilities | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Accommodations | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Consents | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Referrals | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Case Notes | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Tasks | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Tests | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Orders | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Class Schedules | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Documentation | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Forms | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | yes |  |  |  |
| Accommodation Master | Can Add? | yes | yes |  |  |  |
|  | Can View? | yes | yes |  |  |  |
|  | Can Edit? | yes | yes |  |  |  |
|  | Can Delete? | yes | no |  |  |  |

### 3

### Multiple Choice Lists

**Determine your available multiple choice options in SAM.**

**SAM contains many multiple choice fields. You can customize the list of values that appear in these fields to suit your office terminology and/or data tracking requirements.**

For example, under **Students** the user will find 8 default fields:

Status, Service Provider, Campus, Academic Level, Enrollment, Phone Type, Gender, and Ethnicity.

Under each of these, there will be different multiple choice values. For instance, under **Status**, the user will be able to choose from Active, Inactive, or Pending. If you feel you might want to add additional options under **Student** in the future, simply change the final column (**Allow Users to Create New Values**) from no to yes. Then additional values can be added as needed.

Instructions:

1. Edit, delete and/or add, to the **Fields** column to reflect what you will need to track in your office.
2. Edit, delete and/or add, to the **Multiple Choice Values** to reflect what you will need to track in your office.
   * If you would like users to be able to create new multiple choice options “on-the-fly,” put **yes** in the **Allow Users** column; otherwise, put **no**.

|  |  |  |  |
| --- | --- | --- | --- |
|  | *Edit/Delete/Add*  *(optional)* | *Edit/Delete/Add*  *(optional)* | *‘****yes****’ to allow users to add choices*  *or*  *‘****no****’ to not allow addditions* |
| **Table** | **Field** | **Multiple Choice Values** | **Allow Users to Create New Multiple Choice Values?** |
| Students | Status | Active, Inactive, Pending | no |
|  | Service Provider | Users with the role of service provider | no |
|  | Campus | Atlanta, Savannah | yes |
|  | Academic Level | Fr, So, Jr, Sr | no |
|  | Enrollment | Enrolled, Graduated, Transferred, Withdrawn | yes |
|  | Phone Type | Home, Mobile, Work | yes |
|  | Gender | Male, Female | yes |
|  | Ethnicity | African American, Asian, Caucasian, Hispanic, Native American, Other | yes |
| Disabilities | Disability | Acquired Brain Impairment, AD/HD, Aspergers, Blind/Visual Impairment, Chronic Illness/Medical, Deaf/Hard of Hearing, Expressive/Receptive Language Disorder, LD, Motor/Mobility, OCD, Psychological/Psychiatric | yes |
|  | Type | Permanent, Temporary | no |
|  | Documentation Status | Adequate, Inadequate, Pending | no |
| Accommodations | Accommodation | See Accommodation Masters | yes |
|  | Type | Permanent, Provisional, Temporary | no |
| Consent Types | Type | Documentation Provider, Evaluator, Faculty/Staff, Full, Parent, Physician, Vocational Rehabilitation | yes |
| Referrals | Type | Referred By, Referred To | no |
|  | Referral | Counseling, Faculty/Staff, High School, Self, Student, Tutoring, Vocational Rehabilitation | yes |
| Case Notes | Type | Office Visit, Phone, Email, Instant Message | yes |
|  | Purpose | Accommodations, Disability Counseling, Dispute Resolution, Financial Aid, Informational Visit, Intake, Support, Training | yes |
|  | Service Provider | Users with the role of service provider | no |
| Tasks | Type | Appointment, Phone Call, Production Order | yes |
|  | Assigned To | Users with access to application (SAM) | no |
|  | Group / Individual |  | yes |
|  | Status | Cancelled, Complete, Pending | no |
| Tests | Room |  | yes |
| Orders | Publisher | Pearson | yes |
|  | Format Requested | Audio Tape, Braille, CD, Electronic Text, Scan | yes |
|  | Status | Cancelled, Complete, New, Processing | yes |
|  | Delivery Type | Email, Flash Drive | yes |
|  | Source | Library, Other Repository, Publisher File, Reader, RFB&D | yes |
|  | Priority Code | 1, 2, 3 | yes |
|  | Scan File Type | PDF, TIF | yes |
|  | Editing File Type | RTF | yes |
| Class Schedules | Term | Fall, Spring, Summer, Winter | yes |
|  | Year | 2007, 2008, 2009, 2010 | yes |

### 4

### Accommodation Master List

**List the accommodations that your office offers to students.**

SAM contains a short list of default accommodations provided to students. You can place accommodations in a system of categories and groups and give each a Description that reflects the practice of your office.

You can customize the list to suit your office’s accommodation terminology and/or offerings. The accommodations on this list can be assigned to student records thus reflecting the accommodations being provided to the student.

Some of the accommodations will need to be listed on the accommodation letters and some will not. You can choose which you would like to **Hide on the Accommodation Notification/Letter** – simply indicate yes to hide and no to show on the letter. The Accommodation Masters default is set so that you will be able to add additional accommodations in the future.

**Instructions:**

1. Edit, delete and/or add to the **Accommodations** list to reflect the accommodations offered through your office.
   * Optional: Categorize and Group the accommodations
   * Optional: Add a Description for each of the accommodations.
2. Under the **Hide on the Accommodation Notification/Lette**r column, indicate **yes to hide** and **no to show** accommodations on the accommodations letter.
   * Example: You would want Faculty to see that a student needs a ‘Note taker’ so you indicate ‘no’ don’t hide the accommodation on the letter; and you do not want the faculty to see that the student has received a ‘Referral Counseling Center’ so you would indicate ‘yes’ hide on the accommodation letter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***(optional)*** | ***(optional)*** | ***Edit/Delete/Add***  ***(optional)*** | ***(optional)*** | ***‘no’ to show***  ***‘yes’ to hide*** |
| **Category** | **Group** | **Accommodation** | **Description** | **Hide on Accommodation Notification/Letter?** |
|  |  | 4 Function Calculator |  | no |
|  |  | CCTV |  | no |
|  |  | Double Time |  | no |
|  |  | Enlarge Print |  | no |
|  |  | Interpreter |  | no |
|  |  | Private Room |  | no |
|  |  | Quiet Room |  | no |
|  |  | Reader |  | no |
|  |  | Scribe |  | no |
|  |  | Taped Test |  | no |
|  |  | Time |  | no |
|  |  | Time + ½ |  | no |
|  |  | Time + ¼ |  | no |
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