⚫ SAM Implementation Guide

# **The first step in implementing the Student Accommodation Manager (SAM) is to make sure the application is configured to meet the specific needs of your office. The information you provide in this implementation plan will allow the AMAC developers to customize SAM specifically for your office.**

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

**1. Roles & Permissions**

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

**2. Users**

* **Who will be using SAM and in what roles?**

**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?**

**Please review the instructions and complete the tables in this plan. Once the plan has been completed, please e-mail it back to AMAC care of Joe Tedesco,** joe.tedesco@amac.gatech.edu **. If you have questions about SAM or need assistance in completed the plan, contact Joe via e-mail or phone at 404.894.8303.**

### 1

### 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 four roles predefined in SAM: Administrator, Service Provider, Student Assistant, and Test Proctor.** The default permissions for each role have already been filled in below. **(Note: You will assign users to these roles in Step 2. You can define more roles and assign users to these new roles if required.)**

**Instructions:**

* + **Confirm that the pre-assigned permissions are what you would like for each role. If you would like to change these permissions, highlight or note the changes in a different color.**
	+ **If you wish to create a New Role, change the column title to the new role name and complete the column by adding yes or no in each permission row.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | ***‘yes’ to allow******or******‘no’ to forbid*** | ***‘yes’ to allow******or******‘no’ to forbid*** | ***‘yes’ to allow******or******‘no’ to forbid*** | ***‘yes’ to allow******or******‘no’ to forbid*** | ***Add add’l role******(optional)*** |
| **Table** | **Permission** | **Administrator** | **Service Provider** | **Student Assistant** | **Test Proctor** |  |
| Students | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | yes |  |
|  | Can Edit? | yes | yes | yes | no |  |
|  | Can Delete? | **no [cannot change]** | **no [cannot change]** | **no [cannot change]** | **no [cannot change]** |  |
| Disabilities | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | yes | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Accommodations | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | yes | yes |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Consents | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | no |  |
|  | Can Edit? | yes | yes | yes | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Referrals | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | no | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Case Notes | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | no | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Tasks | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Tests | Can Add? | yes | yes | yes | yes |  |
|  | Can View? | yes | yes | yes | yes |  |
|  | Can Edit? | yes | yes | yes | yes |  |
|  | Can Delete? | yes | yes | no | yes |  |
| Orders | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | no |  |
|  | Can Edit? | yes | yes | yes | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Class Schedules | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | yes |  |
|  | Can Edit? | yes | yes | yes | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Documentation | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | no | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Forms | Can Add? | yes | yes | yes | no |  |
|  | Can View? | yes | yes | yes | yes |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | yes | yes | no | no |  |
| Accommodation Master | Can Add? | yes | yes | no | no |  |
|  | Can View? | yes | yes | no | no |  |
|  | Can Edit? | yes | yes | no | no |  |
|  | Can Delete? | **no [cannot change]** | **no [cannot change]** | **no [cannot change]** | **no [cannot change]** |  |

### 2

###  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 QuickBase account will be created by AMAC for each user. The user’s login will be their email address, and they will select their own password when they accept the invitation to join the SAM application.
2. Under the **Role** column, designate which role that user should be assigned: a) **Administrator,** b) **Service Provider,** c) **Student Assistant,** d) **Test Proctor, or** e) **an additional role you have created.**
	* Note: there is a maximum of 10 users included in the monthly maintenance fee. Additional users may be assigned for an additional charge.

|  |  |  |  |
| --- | --- | --- | --- |
| ***Enter user’s first name*** | ***Enter user’slast name*** | ***Enter user’se-mail address*** | ***Indicate either:******Administrator, Service Provider, Student Assistant, Test Proctor, or an add’l role you’ve created*** |
| **First Name** | **Last Name** | **Email Address** | **Role** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### 3

###  Multiple Choice Lists

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

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

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**.

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.

|  |  |  |  |
| --- | --- | --- | --- |
|  | *Edit/Delete/Add**(optional)* | *Edit/Delete/Add**(optional)* | *‘****yes****’ to allow users to add choices**or**‘****no****’ to not allow additions* |
| **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 will appear in a drop-down menu | no |
|  | Campus | Enter campus names if multiples exist | no |
|  | Academic Level | Fr, So, Jr, Sr  | no |
|  | Enrollment | Enrolled, Graduated, Transferred, Withdrawn | no |
|  | Phone Type | Home, Mobile, Work | no |
|  | Gender | Male, Female | no |
|  | Ethnicity | African American, Asian, Caucasian, Hispanic, Native American, Other | no |
| 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 | no |
|  | Type | Permanent, Temporary | no |
|  | Documentation Status | Adequate, Inadequate, Pending | no |
| Accommodations | Accommodation | See Accommodation Masters | no |
|  | Type | Permanent, Provisional, Temporary | no |
| Consent Types | Type | Documentation Provider, Evaluator, Faculty/Staff, Full, Parent, Physician, Vocational Rehabilitation | no |
| Referrals | Type | Referred By, Referred To | no |
|  | Referral | Counseling, Faculty/Staff, High School, Self, Student, Tutoring, Vocational Rehabilitation | no |
| Case Notes | Type | Office Visit, Phone, Email, Instant Message, Other | no |
|  | Purpose | Accommodations, Disability Counseling, Dispute Resolution, Financial Aid, Informational Visit, Intake, Support, Training | no |
|  | Service Provider | Users with the role of Service Provider will appear in a drop-down menu | no |
| Tasks | Type | Appointment, Phone Call, Production Order | yes |
|  | Assigned To | Users with access to application (SAM) will appear in a drop-down menu | no |
|  | Group / Individual |  | no |
|  | Status | Cancelled, Complete, Pending | no |
| Tests | Room | Enter Rooms available for testing accommodation here | no |
| Orders | Publisher | Pearson | yes |
|  | Format Requested | Audio Tape, Braille, CD, Electronic Text, Scan | yes |
|  | Status | Cancelled, Complete, New, Processing | no |
|  | Delivery Type | Email, Flash Drive | yes |
|  | Source | Library, Other Repository, Publisher File, Reader, RFB&D | yes |
|  | Priority Code | 1, 2, 3 | no |
|  | Scan File Type | PDF, TIF | no |
|  | Editing File Type | RTF | no |
| Class Schedules | Term | Fall, Spring, Summer, Winter | no |
|  | Year | 2007, 2008, 2009, 2010, 2011 | yes |

### 4

###  Accommodation Master List

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

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** – 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 –******to organize the drop-down list of accommodations into manageable categories (e.g. testing accommodations)*** | ***Optional –******to organize the drop-down list of accommodations into manageable groups (e.g. testing environment or time)*** | ***List the accommodations and the order that you would like them to appear in the drop-down menu.******Note: these should be brief (no more than 3-4 words) and can be short-hand*** | ***Optional – use this field to more accurately describe the brief accommodations listed in the drop-down.*** | ***‘no’ to show******‘yes’ to hide*** |
| **Category** | **Group**  | **Accommodation** | **Description** | **Hide on Accommodation Notification/Letter?** |
| Testing Accommodations | Time | 1½x time on tests  |  | no |
| Testing Accommodations | Time | 2x time on tests |  | no |
| Testing Accommodations | Format | Braille test |  | no |
| Testing Accommodations | Format | Large Print Test |  | no |
| Testing Accommodations | Environment | Quiet/Low-Distraction Test Area |  | no |
| Testing Accommodations | Environment | Ability to take breaks during testing |  | no |
| Testing Accommodations | Assistive Technology | Assistive technology during testing |  | no |
| Testing Accommodations | Assistive Technology | Calculator |  | no |
| Testing Accommodations | Assistive Technology | Electronic Speller |  | no |
| Testing Accommodations | Assistive Technology | Use of computer for essays |  | no |
| Classroom Accommodations |  | In-Class Assistant |  | no |
| Classroom Accommodations |  | Lab Assistant |  | no |
| Classroom Accommodations |  | Sign Language Interpreters |  | no |
| Classroom Accommodations |  | Note taking Service |  | no |
| Classroom Accommodations |  | Priority seating in classroom |  | no |
| Course Accommodations |  | Additional Absences |  | no |
| Course Accommodations |  | Computer for all written assignments |  | no |
| Academic Accommodations | Alternative Text | Alternate textbook format |  | no |
| Academic Accommodations | Courses | Reduced Course Load |  | yes |
| Academic Accommodations | Registration | Priority Registration |  | yes |
| Campus Accommodations | Parking | Disability Parking |  | yes |
| Campus Accommodations | Housing | Housing Modifications/Accommodations |  | yes |
| Assistive Technology |  | Use of Screen Reader |  | no |
| Assistive Technology |  | Assistive Listening Device |  | no |
| Assistive Technology |  | Captioned Videos |  | no |
| Assistive Technology |  | 4 Function Calculator |  | no |
| Assistive Technology |  | CCTV |  | no |
|  |