EVERY CHILD IS A NATIONAL ASSET

MODULE 3 PART 1

ABC OF ...
LEARNER AND PARENT INFORMATION

basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

Contents

General Instructions on using SA-SAMS Manual:

✓ Fields containing **an arrow** on the side **contains drop-down boxes** with pre-populated information. **Click on the arrow** to display the list and then **click on selected value**.

✓ Click on **Save** to update all capturing.

✓ Click on **Done** to exit the screen.

The following symbols are used in the manual to indicate the required action with every screen:

Background **Information**	Data used in other modules or pre-captured data needed	Options in **drop-down tables**	Screens that require **capturing**	**Printouts and Reports**	Summary and Stats screens

A. INTRODUCTION

1. Purpose of the module

The **Learner and Parent Information Module** and **Learner Listing Module** (Fig. 1) assist schools with the administration of the biographical data of learners and parents information.

- o It also contains the processing and administering of attendance, disciplinary and extra-mural functions. (Included in chapter 1)

- o This module also assists with the administration of the promotion procedures and placing of learners in register classes. (Included in chapter 2)

SA-SAMS : School Administration and Management System
MAIN MENU

1. General School Information	11. Financial Assistant
2. Human Resource Information	12. Curriculum Related Data
3. Learner and Parent Information	13. Timetabling Assistant
4. Learner Listing	14. Physical Resources
5. Governance Information	15. Library Module
6. Standard Letters and Forms	16. Security and Database Functions
7. Export Data	17. Lurits Approval Module
8. Annual National Assessment	

Figure 1: Main Menu

This Module is dependent on the following data **already being captured** in other modules:

Module	Data to be pre-captured (with the SA-SAMS menu no)
1	School details (1.1), Grades (1.2), Classes (1.3), School Terms (1.6), subjects offered by the school(1.5), Bus routes (1.9), Bus Ticket (1.10), Demerit /merit codes (1.11), School Hostels (1.12), Feeder Schools (1.13)
2	Educator details (2.1)

Data from this module **will be required by the following modules** e.g.

Module	Learner data used for (SA-SAMS menu no)
11	Finance
8 &12	ANA (8) & Curriculum (12)
13	LTSM

B. COMPONENTS OF THE MODULE

2.   Module 3: Learner and Parent Information and Module 4: Learner Listing

The administration and management functions regarding the learner data and parents information can be divided into 6 sections according to the specific purposes:

      2.1   Learner biographical information & LSEN
      2.2   Parent & family information
      2.3   Learners: additional records
      2.4   Disciplinary
      2.5   Learner attendance
      2.6   Reports & stats

These sections are tabled below with the relevant headers and SA-SAMS menus that are used in this manual:

Header & (SA-SAMS menu number)		Functionality
2.1 Learner biographical information & LSEN	2.1.1 Learner biographical data (3.1.1 & 4.1)	➢ View learner profile ➢ Learner information: add, edit and print
	2.1.2 Learner archive	➢ Archive learner ➢ Restore a learner ➢ Print a transfer card
	2.1.3 Learner application (3.1.2)	➢ Learner applications ➢ Blank application forms
	2.1.2 SNE Learners	➢ SIAS for SNE Learners
2.2 Parent information	2.2.2 Parent information	➢ Parent information: add, edit and print ➢ Parent archives ➢ Learner family relationship summary ➢ Learner/parent listed & exported ➢ Parent only lists for SGB
2.3 Learners: additional functions	2.3.1 Participation in extra-mural activities (Menu 3.1.1& 3.5.7)	➢ Add activities per term ➢ Print summary of activities ➢ Print lists of age group per sport house
	2.3.2 Assign Learners to bus routes (Menu 3.9)	➢ Learners assigned to a bus route ➢ Bus tickets printed
	2.3.3 Maintain RCL (Menu 3.1.1)	➢ RCL member: add and edit
	2.3.4 Archived marks (Menu 3.1.1)	➢ Select and print marks from previous years.
	2.3.5 Reported Incidents (Menu 3.1.1)	➢ Incidents e.g. pregnancy, racial and domestic are recorded, edited & printed
	2.3.6 Learning barriers (Menu 3.1.1)	➢ Learning barriers recorded, edited & summary lists printed
	2.3.7 Assign mentors (Menu 3.1.9)	➢ Add Mentor to a learner + print list

2.4. Demerits and merit	2.4.1 Maintain Merit / demerit incidents (Menu 3.7.1)	➢ Demerit/merit settings
	2.4.2 Manage detention and other actions (Menu 3.7.3)	➢ Manage learners demerit/merit
	2.4.3 Statistical reporting (Menu 3.7.5 & 6)	➢ Print learner demerit/merit score lists ➢ Print demerit/merit report
2.5. Learner attendance	2.5.1 Maintain learner attendance (Menu 3.3.1, 3.3.3 & 3.3.7)	➢ Print blank attendance register ➢ Maintain weekly learner attendance ➢ Maintain learner attendance per period
	2.5.2 Learner attendance reports (Menu 3.3.4 – 3.3.12)	➢ Learner absence notification ➢ Attendance details report per learner ➢ Weekly/Monthly/ Quarterly attendance summaries
	2.5.2 Learner attendance reports (Menu 3.3.13 – 3.3.15)	➢ Total of days absent per learner ➢ Weekly / Monthly Learner Attendance Summary per Class ➢ Quarterly Attendance
2.6 Reports & Stats	2.6.1 Statistical Data and Reports Menu	➢ Enrolment printouts ➢ Learner age + house group lists ➢ Learners + extra mural activities ➢ Details of SNE learners ➢ Learner details data printouts ➢ Learner aggregated data printouts ➢ Extra mural activities report

The administration and management functions regarding the learner data and parents information can be divided into 6 sections according to the specific purposes:

Each of the functions will be discussed individually under the related sections.
The references to the SA-SAMS Menu from the **Learner and Parent Information Module** are shown in Figure 2.

SA-SAMS : School Administration and Management System
3. LEARNER AND PARENT INFORMATION

3.1. Learner Data Files Menu	3.11. Assign Mentor to Learner
3.3. Learner Attendance Data Menu	3.13. Reporting Language
3.5. Statistical Data and Reports Menu	3.15. Subject Registration Summary
3.7. Demerits and Merit Module	3.17. NSC Exam Registration
3.9. Learner Bus Routes	3.19. Process and Maintain Learner Promotions
	<< MAIN MENU

Figure 2: Components of Learner and Parent Information

2.1 Learner biographical information & LSEN

Learner biographical data can be captured in **Menu 3.1.1: Learner & Parent Information** as well as **Module 4: Learner Listing**.

2.1.1 Learner biographical data (Menu 3.1.1)

This menu contains the biographical details of the learners at the school.

- o This part is **compulsory as the information is required by all school surveys** and other official school reports.
- o Data should be **checked quarterly and updated** whenever there are any changes.
- o **Archived learners should not be captured as new** but should be reinstated to avoid learner duplicates.
- o Data is **captured from a blank learner registration form** that was completed by the parent (Menu 3.1.2 & 6.2)

☞ The learner screen has an option to list **Current Learners** or **Future Registrations (learners)** selected at the 2nd line of the screen. (Fig. 3)
  - The **total number of learners** captured is indicated at the **top**.
  - The screen opens with a view of all learners that are **listed alphabetically** with accession number, grade, class, gender and ID number.
  - Select a **grade or class** from the drop-down list to filter for a **specific group** of learners.
  - Learners can be searched by Surname or by Accession Number through the **Search List for Learner** facility on the bottom of the screen.
  - Learners can be **added, edited or archived and details printed** on this screen
  - **Future Registrations** is a list of applicant learners for the following year that has been accepted by the school and registered on the system (See section 2.1.2. of this manual).

Figure 3: List of Learners Captured on the System

2.1.1a Learner profile (Menu 3.1.1)

A summary of a learner's profile is available for reference on the year's performance, activities, subjects and disciplinary records (Fig. 4).

✍ Double click on a selected learner to view the summary profile.
- The learner's name, grade, class, date of birth, days absent, disciplinary incidents and fees paid are displayed.
- The learner's photo will be displayed if learner photographs were added.
- The current subjects, subject teachers and marks captured to date are listed.
  - o Click on the subject to view the task marks separately.
- Comments can be added for future reference and saved by clicking on **Save Comment**.
- Click on **Print summary** for a printout.

Click on **Done** to exit the screen.

Figure 4: Summary Learner Profile

2.1.1b Add New Learner (Menu 3.1.1)

Learner Data is **captured from a blank learner registration form** that was completed by the parent.

☞ Click on **Blank Application Form** (Menu 6.2 or 3.1.2).
- Select **Blank Learner & Parent Application Form** and click on **Print** (Fig. 21).
- Distribute the printed blank copies to the parents before registration of new learners begins. Collect completed forms for capturing during the year.

☞ Capture the learner data on Learner Information (Menu 3.11) by selecting **Add new Learner** (Fig. 3).
- Tracking number screen opens to verify if a learner is not a duplicate (Fig. 5).
  - ○ Select if a learner has a "**LURITS" number** and add official number if known. DO not add any random number in this box.
  - ○ A Learner Tracking Number is a 9 digit National Tracking Number which is allocated to learners by the **LURITS** (Learner Unit Record Information and Tracking System).
- Click on **Next** or **Done** to capture the learner details on the following screens.

Figure 5: Learner Tracking Number

There are three pages (**Compulsory, Additional and Medical Information**) that have to be completed (Figures 6, 7 & 8).

✍🏻 All the *fields marked in blue* in **Learner Information** (Fig. 6) must be completed before you can **Save** the data.

- Fields with arrows are populated from a drop-down box. Options for the drop-down tables are given below the screen.
- Data is captured from a learner application form completed by the parent (6.2).
- Learners need to supply copies of the following documents for verification: Birth certificate, ID or passport.
- **Reporting Language** is the language selected for communication to the learner.
- Learner's photographs can be scanned and stored on the computer or browsed for from another location
- To save all captured data click on **Save**

Click on **Additional Details** tab to complete further required fields (Fig. 7).

Figure 6: Biographical Learner Information

The options available for the different drop-down boxes for **Page 1: Personal Details** are tabled below.

Drop-down Fields for Menu 3.1.1 p1	Options		
Registration Date	• Calendar to select date		
Grade	• List of grades offered by the school (Selected in Module 1)		
SNE Primary Disability	• Attention deficit disorder • Autistic spectrum disorder • Behavioural disorder • Blind • Cerebral palsied • Deaf • Deaf/blind disabled • Epilepsy • Hard of hearing	• Mild/moderate intellectually disabled • Moderate to severe intellectual disabled • Multiple disabled • Partially sighted • Physically disabled • Psychiatric disorder • Severe intellectually disabled • Specific learning disability	
Years in Grade	• 1st year in this grade • 2nd year in this grade	• 3rd year in this grade • 4th year in this grade	
Gender	• Male	• Female	
Population group	• African/Black • Asian/Indian	• Coloured • White	• Other
Citizenship	• South African	• Immigrant	

Reason for no ID	• Not yet applied	• Applied	• Other
Country of Residense	• South Africa	• Other	
Province	• List of 9 provinces		
Reporting Language	• Afrikaans	• English	

✍ All the *fields marked in blue* in **Additional Details** (Fig. 7) must be completed before you can **Save** the data.

- Fields with arrows are populated from a drop-down box. Options for the drop-down tables are given below.
  - o **Home Language** is the language spoken by the learner at home.
  - o **Language of Instruction** is the language in which the subject is taught. This is the language used for teaching the non-language subjects e.g. Mathematics.
- To save all captured data click on **Save.**

Click on **Medical Information** tab to complete further required fields (Fig.8).

Figure 7: Additional Learner Information

The options available for the different drop-down boxes for **Page 2: Additional Details** are tabled below.

Drop-down Fields for Menu 3.1.1 p2	Options		
Home Language	• All Official Languages	• Sign Language	• Other
Instruction Language	• All Official Languages	• Sign Language	• Other
Preferred language	• All Official Languages	• Sign Language	• Other
Hostal name	• *Pre-populated in Module 1 -1.12*		
Mode of transport	• Bus transport scheme • By foot 2km or less • By foot 2km to 5km • By foot 5km plus	• Hostel • Employer Bus • Motor Car • Motor Cycle	• Bicycle • Taxi • Train
Number of Deceased Parents	• Both parents deceased	• Mother Deceased • Father Deceased	• None
Sport/House Group	• *Pre-populated in Module 1 -1.13*		
Primary Education	• Non Formal	• Formal (Grade R)	• None
Previous School	• School in this province • School in other province • School in other country	• This school	• None
Province	• List of 9 Provinces		
Select Feeder School	• *Pre-populated in Module 1 -1.14*		

⌲ The **Medical information** (Fig. 8) contains information on :
   o **Medical aid number** and concontact numbers of the **family docter** AND / OR
   o **Hospital / Clinic Patient Number** and Hostpital / Clinic Contact numbers
   o Reported **medical conditions**
   o Problems requiring **counselling**
• The following must be completed before you can **Save** the data:
   o **Dexterity** of a learner and if the learner is fed by the **NSNP**.

   o **Type of grants** applied for / received needs to be ticked off.
• Fields with arrows are populated from a drop-down box. Options for the drop-down tables are given below.

• To save all captured data click on **Save**

⌲ Once you have saved the learner's details, you will notice that the **Add/Link Parent** button turns yellow (Fig. 9). Click on **Add link to Parent** and follow the directions in chapter 2.2 of this guide to complete the capturing.
   o You may **add a new parent** for the learner or you may li**nk the learner to an existing parent.** (Parent previously added to the system for another learner).
   o It is compulsory to add at least one parent onto the system for each learner.
Click on **Done** to exist screen.

The options available for the different drop-down boxes for **Page 3: Medical Information** are tabled below.

Drop-down Fields for Menu 3.1.1 p3	Options		
Dexterity of the learner	• Left handed	• Right Handed	• Ambidextrous
Learner benefit from NSNP	• Not applicable	• Yes	• No

Figure 8: Medical Information

✍ Once you have saved the learner's details, you will notice that the **Add/Link Parent** button turns yellow (Fig. 9).

- Click on this button to add a new parent or link an existing parent to the learner.

- See section 2.1.2 in this module on how to add / link a parent to the learner.

Figure 9: Add parent to learner

2.1.1c View / Update details of the Learner (Menu 3.1.1)

Learner data needs to be verified at least once a year. Pre-populated learner information forms can be printed and send for verification by the parents.

✍ On Menu 3.1.1 click on **View/Update Learner** (Fig. 10 or 3).
- Data can be updated on the 3 biographical pages: **Personal, Additional and Medical Information**. (Figures **6**, 7 & 8)

- To save all captured data click on **Save**
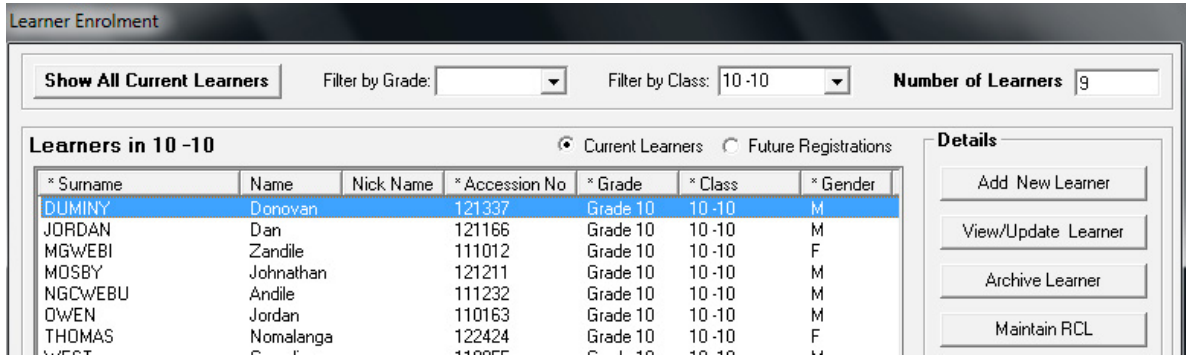
Figure 10: View / Update Learner Data

- **More functions are included to the Personal Detail** screen as shown in Figure 11. These are duplicate functions that can be accessed/ captured on other screens as tabled below. These functions will be discussed in the duplicate screen

Function button on screen	Duplicate screen	Functionality
Learner photograph	See General Settings 1.16	To import a photo and save in accessible folder
Disciplinary records	See Merit & Demerit	To add a disciplinary incident
Learning barriers	See SIAS for SNE learners	Add disability as certified
Incident Information		Add social or other incident That needs to be added in the Learner Profile.
Main Parent	See Parent information 3.1.11	Add parent information.

Figure 11: Update Learner Details

2.1.1d Remove / Archive a Learner (Menu 3.1.1)

Learners have to be **archived before they are removed** from the current enrolment list of a school as this is a requirement for record keeping and auditing.

- o **Archived learners that return back to the school should be reinstated** from the **archive folder and not be captured as new** in order to avoid duplicate learners.
- o Archived Learners can be deleted from the system in Menu 3.1.15.

⮌ On Menu 3.1.1 click on **Archive Learner** (Fig. 10 or 3).
- • The learner details will be populated. Add the date, grade of learner leaving (last grade attended) (Fig. 12).

- • Select a reason for leaving and when selecting death a cause for death.

- • To save all captured data click on **Save to Archive.**

Click on **Done** to exit the screen.

Figure 12: Archive Learner

The options available for the drop-down boxes for **Archive Learner** are tabled below.

Drop-down Fields	Options	
Reason for leaving	• Death	• Long term illness
	• Expulsion	• Transfer to another school
	• Graduated	• Compulsory education no longer applies
	• Absconded	• Transfer to FET College
	• Pregnancy	• Dropped out
	• Emigrated	
Cause for death	• Accident	• Suicide
	• Illness	• Violence

2.1.2   Learner Archive (Menu 3.1.15)

All learners who have left the school and have been archived are listed under **Learner Archive** (Fig.13). The following functions are available:

2.1.2a Print learner transfer cards

2.1.2b Restore/ reinstate archived learners

2.1.3c Search and print archived learners data

2.1.2a Print learner transfer cards

✍ On Menu 3.1.15 click on **Print Learner Transfer Card** placed above the list of archived learners (Fig.13)
- Tick the **learner(s)** off from the list of archived learners that needs a printed transfer card.
- Select **Date of Issue** from the calendar on the bottom right.
- Click on **Print** to print the Learner transfer form (Fig.14)
  - o   The transfer card is an official report with the school logo and address
  - o Learner details, last grade attended, highest grade passed, period at the previous school, reason for leaving and parent contact details.
  - o Principal's signature and school stamp.

Click on **Done** to exit the screen.

Figure 13: Learner Archive

TRANSFER FORM FOR LEARNERS

Figure 14: Example of a learner transfer form

2.1.2b Restore archived learners
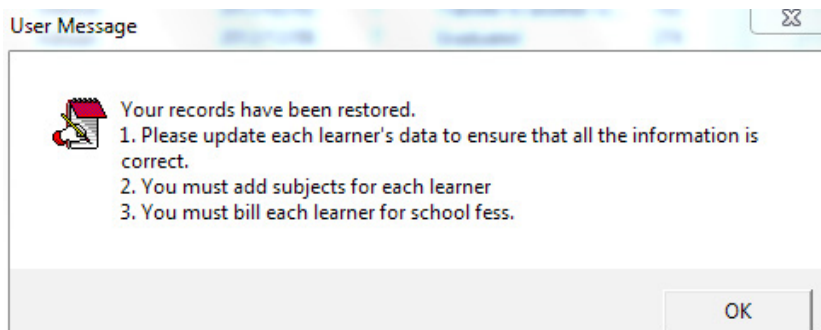
Archived learners that return back to the school should be reinstated (restored) from the archive folder and not be captured as new in order to avoid duplicate learners (Fig.15).

⌦ On Menu 3.1.15 find a **learner** from the list of archived learners that needs to be restored and **tick** the box.
  - To place the learner back in the correct grade and class, select a **grade and class** from the drop-down list.
  - The original registration date of the learner shows in the **Registration Date** box.
  - Click on **Restore** and then **yes** to confirm.
  - A user message verifies that the learner has been restored and informed that subjects should be added and accounts send (Fig. 16).
  - The learner is now listed under **Current Learners**.

Click on **Done** to exit the screen.

Figure 15: To restore an archived learner

Figure 16: User message to confirm reinstatement of learner

2.1.2c Search & print archived learners data

All learners who have left the school and have been archived are listed under **Learner Archive** (Fig.13) can be searched and listed according to different criteria.

✓ Learners can be **listed and searched** under the following headings:
- Show all OR archived in a certain period OR according to a reason for leaving
- Learners that graduated can be searched according to a year
- Click on **OK** to list the selected group.

Click on **Done** to exit the screen.
✓ Click on **Archive List Printouts**
- Choose the list to be printed from the options given in Figure 17.
- Click on **Print** and then **OK** to view the printout on a print screen (Fig.18).
- Click on the **printer icon** to print a hard copy.

Click on **Done** to exit the screen.

Figure 17: Learner archive list printout

Report printed on: 2013 05 15

LEARNERS WHO HAVE LEFT THE SCHOOL: BETWEEN   2013/05/15 and 2013/05/15

Acc No:	Date Left	Surname	First Name	Gender	Reg Date	Last Grade	Reason

Figure 18: Example of a learner list printout

✓ Learner records of the archived learners can be printed for reference.
- Tick the **learner(s)** off from the list of archived learners.
- Select from **Learner Records** the following the report to be printed:
  - **Learner details, view family,** progress reports as available in **marks archive** (Fig.19) **and absentee history** (Fig.20).
- Click on **Print** to print the reports.

Click on **Done** to exit the screen.

Figure 19: Available Progress Reports in Marks Archive

Figure 20: Example of an absentee report for an archived learner

Delete a learner (Menu 3.1.18)

Archived Learners can be deleted from the system in Menu 3.1.15 and 3.1.18.
- o   This is used to remove duplicate learners from the system.
- o   The entire record with all learner details and marks will be permanently removed from the system.

⌨ Click on **Delete Entire Learner Record** (Menu 3.1.18) to remove a learner's record (Fig. 21).
- • Select a grade to list all **current and archived learners.**
  - o   A drop- down list contains all grades and a graduated group.
- • Tick in the box next to the selected learners and then click on **Delete learner.**
- • To reselect the learners click on **Clear Selection** on select learners from the start.
  - o   An insert screen appears to warn the user that this action is permanent.

- • Click on yes to continue the action.
Click on **Done** to exit the screen.
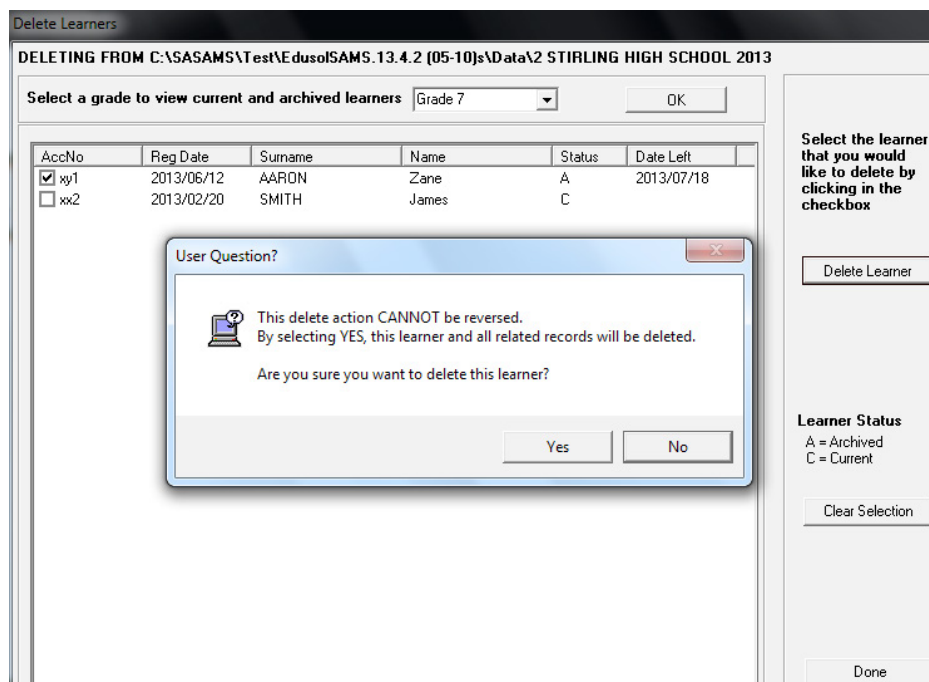
Figure 21: Delete learner records permanently

2.1.3 Learner Applications (Menu 3.1.2)

This section captures and manages new learner applications for **future admissions** into the school.

- o Current learners are not re-registered annually on SA-SAMS but their data are rolled over to the next year until the learners are archived.
- o Future learner's details can be recorded during the year from the applications received for admittance into the school in the following academic year.
- o The status of the applications can also be recorded and used for management of future admissions.

↗ Click on **Learner Applications** (Menu 3.1.2) to list the names of learner applications for **future admissions** (Fig. 22).

2.1.3 a Learner details are captured from a completed Blank Application Form.

2.1.3 b Details of the applicants can be added, updated or deleted.

Status of the application can be added and updated.

2.1.3 c Captured applications can be removed from the system.

2.1.3 d Application Printouts are hardcopies of a specific group of applicants.

2.1.3 e The names of the applicants are transferred to the current learner list after   registration of the learners.

Click on **Done** to exit the screen.

Figure 22: Learner Applications

2.1.3a Add Learner Applications

✍🏻 On Menu 3.1.2 click on **Blank Application Form.**

- Select **Blank Learner & Parent Application Form** and click on **Print** (Fig. 23).
- Click on **OK** to view the printout on a print screen. Click on the **printer icon** to print a hard copy.

Distribute the printed blank copies to the parents before registration of new learners begins.

- o Collect completed forms for capturing during the year.

Figure 23: Print Blank Learner Applications Forms

✍🏻 To capture the learner's data click on **Add New Applicant** to open the data capture screen (Fig. 24).

- Complete **all** the learner's details in the relevant fields.
  - o To save time and effort the captured information will be automatically uploaded into the learner screen once the learner is registered.
- The application **status is set as pending** by default.
- Click on **Save** to save the captured information.

Click on **Done** to exit the screen.

Figure 24: Add / View / Edit Learner Application

2.1.3b Edit / Update Learner Applications (Menu 3.1.2)

In this screen the **details of the applicant learner** can be edited or viewed.

o It is necessary to update the **status of all learner applications** on the edit form to keep accurate statistics on learner applications to the school.

To **edit or view** details of the applicant learner:

✍ On Menu 3.1.2 select a learner and click on **View/Edit Application** (Fig. 24).

- Update the applicant's details in the relevant fields (Fig. 24).

- **Update the status** of the application in the relevant fields.

   o Application will be **pending** until the status is updated to **Application accepted** or **Application refused** or **Application withdrawn**.

   o Give reasons for applications that are refused or withdrawn /cancelled for future reference.

- Click on **Save** to save the captured information.

Click on **Done** to exit the screen.

2.1.3c Remove Learner Applications

To **remove** an applicant from the list:

✓ On Menu 3.1.2 select a learner and click on **Delete Application** (Fig. 22).

- Click on Yes to confirm removal.

2.1.3d Print Learner Applications

✓ On Menu 3.1.2 click on print applications to print a hardcopy of a selected list of the applications.

- **Select the option** for the printout (Fig. 25).
- Click on **Print** and then **yes** to view a print preview of the group.
- Click on the **Printer icon** to print a hardcopy.

Click on **Done** to exit the screen.
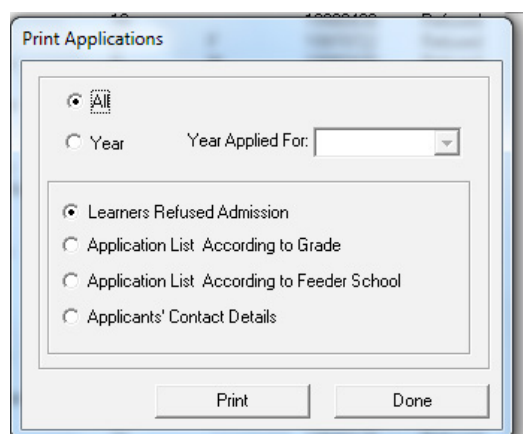
Figure 25: Print Applications to the school

2.1.3d Register Future Learners (Menu 3.1.2)

A successful applicant is registered as follows:

✓ On Menu 3.1.2 select a learner and click on **Register the Learner** (Fig. 22).

- Select a **registration date** on the calendar e.g. first day the following year.
- The applicant's details are transferred to **Learner Information: Future Year** (Fig. 26).
- Complete the blank fields and click on **Save** to save the captured information.

Click on **Done** to exit the screen.

The Applicant's name will be removed from the learner application list.

Figure 26: Learner Information Menu

2.1.4 SIAS for LSEN Learners (Menu 3.1.9)

National Strategy on Screening, Identification, Assessment and Support (SIAS) aims to ensure that barriers to teaching and learning are addressed and all learners are supported to participate and develop their full potential in their neighbourhood schools with their peers.

To access this functionality the File **SAMS_SNE exe** needs to be installed in the same folder as **EdusolSAMS. exe.**

✍ Click on **SIAS for SNE Learners** (Fig. 28) to open the list of SNE learners.

Figure 28: SIAS for SNE menu

* Click on **Support Needs Assessment** to find the diagnostic profile and record of support to the learner.

* Update the learner records as required.
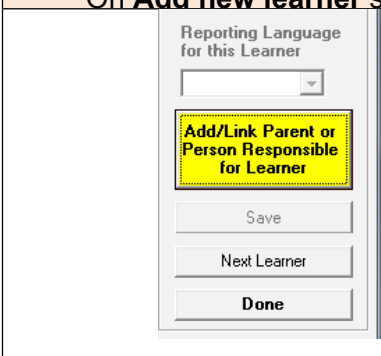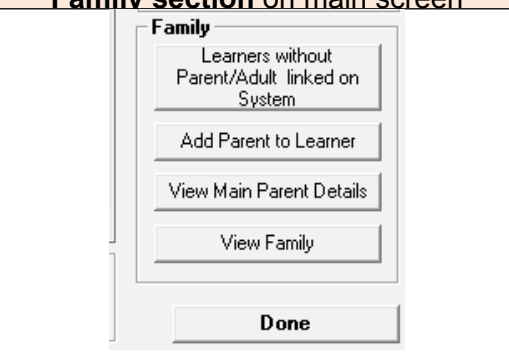
Note that tutorials for this manual have been captured in a separate manual

2.2 Parent & Family information (Menu 3.1.11 to 3.1.13 & 3.1.19)

This menu contains the details of the learner's parents at the school.

o It is **compulsory** to add at least one parent onto the system for each learner.

o Data should be **checked quarterly and updated** when there are any changes.

o Data is captured from a completed parent information / application form.

✍ Parents are added/ linked on the Learner Information screen (Menu 3.1.1) under the following options tabled below:

- Click on the **yellow button** after adding a new learner or click on **Add Parent To Learner** on the main screen of an existing learner to open the capturing options.

- There are two ways in adding a parent to a learner (Fig. 29):

  2.2.1 Li**nk the learner to an existing parent** that was previously captured to the system for a sibling OR

  2.2.2 **Add a new parent** by capturing parent details.

Figure 29: Select Parent Option

2.2.1 Link a Learner to an Existing Parent

✍ Click on **Search for Parent** (Fig. 29).

- A **list of existing parents** is populated on the blank screen (Fig. 30).
- The total number of parents captured in the system is shown at the top.
- Parent can be searched by typing the surname at the **bottom search box** OR
- Selecting the first letter of the Surname at the **Filter Parent listing** box.
- Link the parent by ticking the box next to the selected parent(s).
- Click on **Save Parent to Learner**

Click on **Done** to exit the screen.
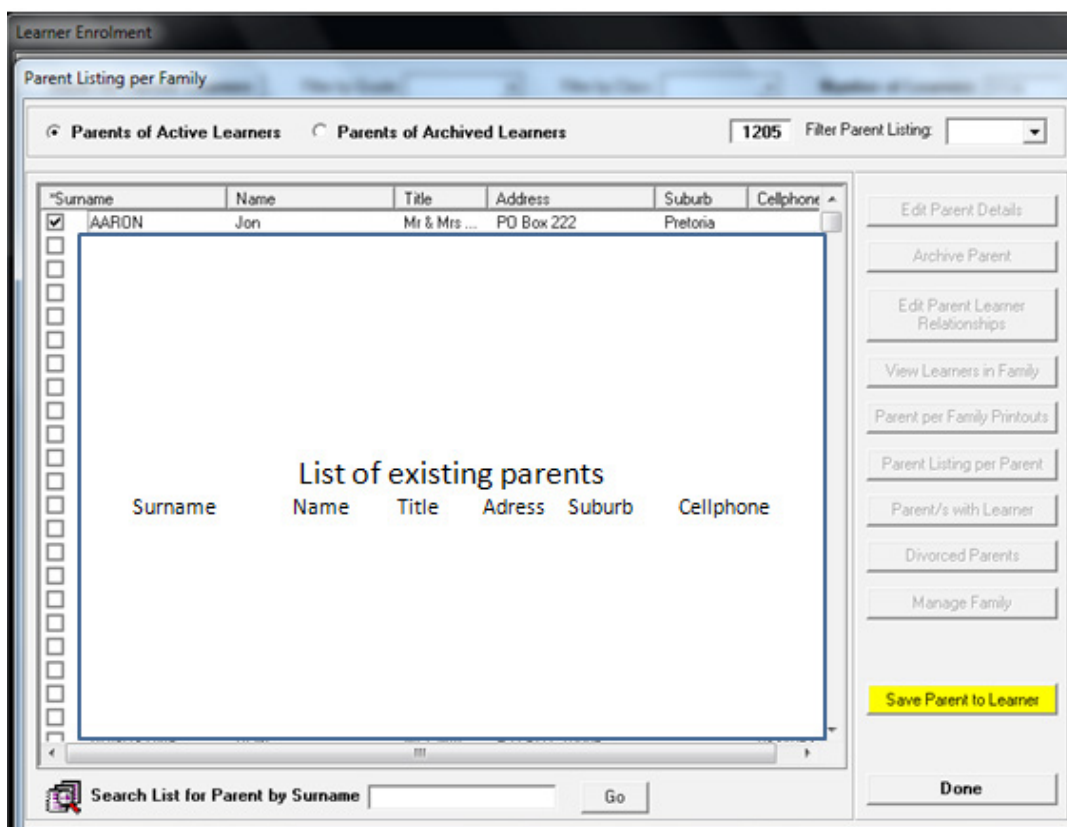
Figure 30: Search to link Existing Parent

2.2.2 Add New Parent

☞ Click on **Blank Application Form** (Menu 6.2 or 3.1.2 as shown in Fig. 23).

- Select **Blank Learner & Parent Application Form** and click on **Print** (Fig.23).

- Click on **OK** to view the printout on a print screen. Click on the **printer icon** to print a hard copy.

Distribute the printed blank copies to the parents before registration of new learners begins.
   - Collect completed forms for capturing during the year.

☞ To capture the data from the completed forms on the system click on **Add New Parent** (Fig. 29).

- Complete all the details for the parent (Fig. 31) for future reference.
   - The **initials and surname** populates automatically in the correspondence box
   - Tick **Copy to Postal Address** to copy the typed residential address for the correspondence address.
   - Tick if **learner is staying with parent** and select the **relationship** with the learner from the drop-down list.
   - Indicate if the parent is the **account payer**.
- In the case of learners whose parents are not living at the same address: **add another parent** for the same learner by clicking on **Next Parent**
- In case of learners staying with a family member e.g. Grandparent: add the parent details for the same learner at the **Next Parent**.
- To save all captured data click on **Save.**

Click on **Done** to exit screen.

Figure 31: Add New Parents

The options available for the drop-down boxes are tabled below:

Drop-down Fields	Options	
Relationship to Learner	• Mother & Father • Father • Mother • Foster Parent	• Grand Parent • Legal guardian • Step Parent • Other
Marital Status of the Parent	• Married • Single	• Divorced • Widowed • Separated

2.2.3 View / Edit Parent Information (3.1.11)

i   In this screen the **details of the parent** can be **edited or viewed**.

     o   It is necessary to **verify and update the data at least annually** in order to keep accurate contact details of the parents. This can be done by printing completed profiles (Menu 6.3) and send to parents to verify their information.

☞ Click on **Parent Information** (Menu 3.1.11) to open the Parent Listing screen (Fig. 32).

- The total number of captured parents is indicated at the top of the screen.

- The parents are listed as **Parents of Active Learners** or **Parents of Archived Learners.**

- Search for a parent by filtering the list according to the first letter of the parent's surname at the top of the screen OR

- Type the parent's surname in the box at the bottom and click on **Go**.
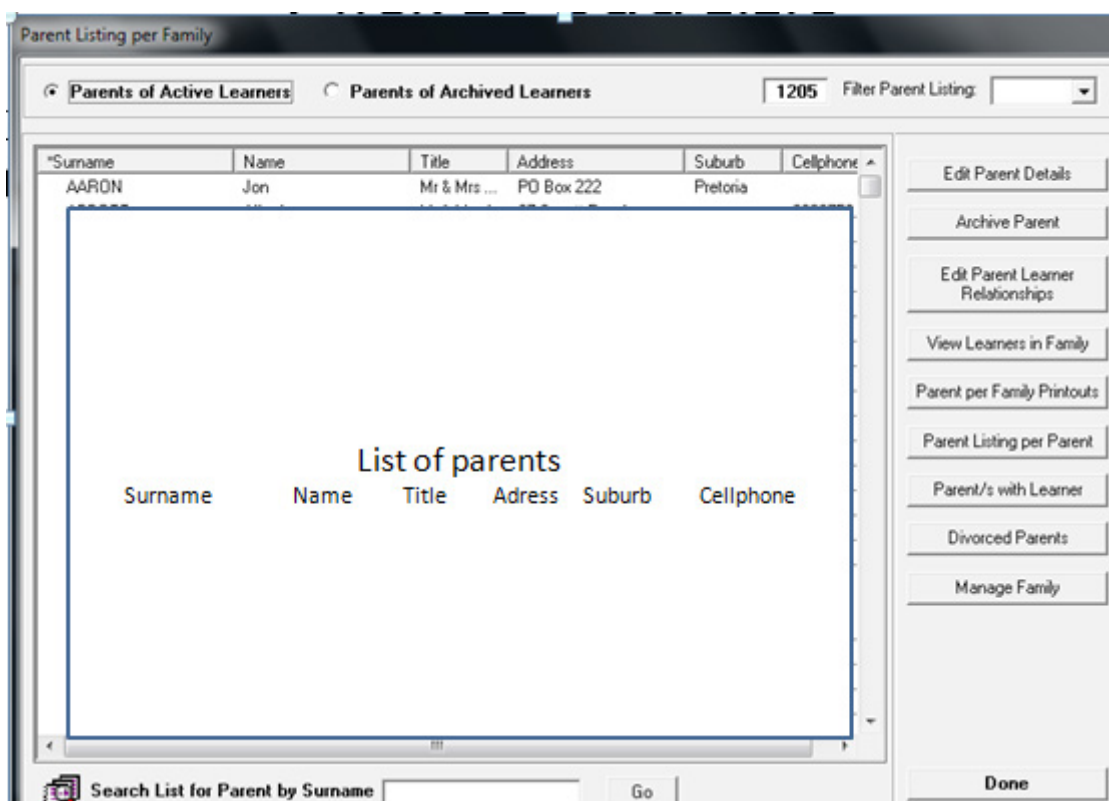
Figure 32: Parent Listing

☞ Click on the **name of the selected parent** and then click on **Edit Parent Details** to view or update the parent's details (Fig. 32).

- Click on **Save** to save any changes/ updates.

Click on **Done** to exit the screen.

2.2.4 Archive Parent (Menu 3.1.11 & 3.1.16)

o Parents are archived to remove the parents from the two parent lists (Parents of Active Learners or Parents of Archived Learners).

o Archived parents can be restored and need not to be recaptured.

Click on the **name of the selected parent** and then click on **Archive Parent** (Fig. 32).

- The parent's name appears on the screen. (Fig. 33)

- Select the date the parent and a reason for archiving the parent.

- Click on **Save to Archive** and the click on **Done** to exit the screen.

Figure 33: Archive Parent

The options available for the drop-down box are tabled below:

Drop-down Field	Options	
Reason for archiving	• Death • Learner: Expulsion • Learner: Graduated • Learner: Absconded • Learner: Pregnancy • Learner: Emigrated	• Learner: Long term illness • Learner: Transfer to another school • Learner: Compulsory education no longer applies • Learner: Transfer to FET College • Learner: Dropped out

✍ Click on menu 3.1.16 to view the list of archived parents (Fig. 34).

- Parents are listed according to the following options: **Archive Date** or **Archive Reason** or **all.**

- Parent can also be searched by typing a surname.

- To restore a parent to the parent list **click on the parent** and then click on **Restore Parent**.

Click on **Done** to exit the screen.
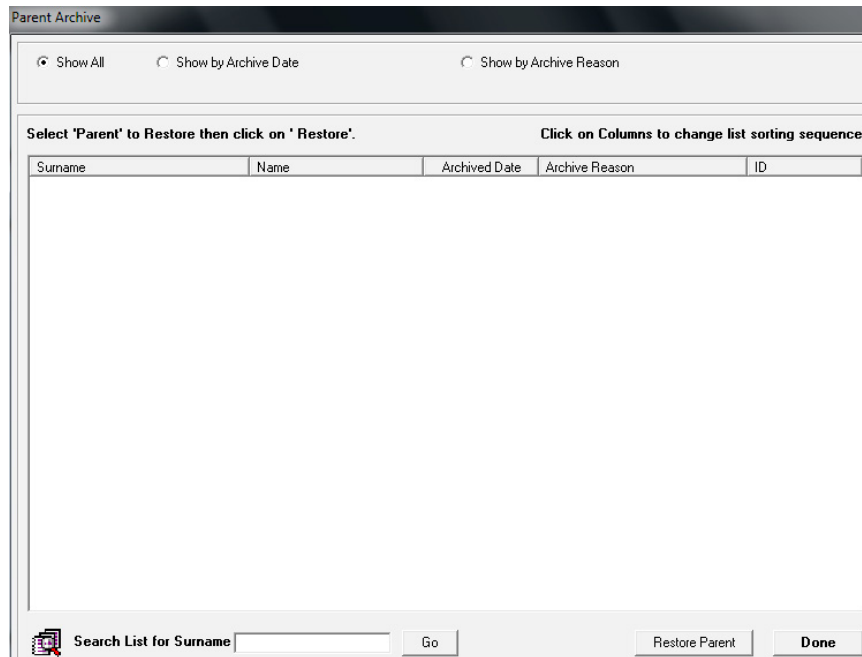
Figure 34: Parent Archive

2.2.5 Parent learner relationships (Menu 3.1.11 - 3.1.13)

o Family structures of the learners in the school (parents and siblings) can be viewed or updated in **Learner Information** (Menu 3.1.1) or **Parent Listing** (Menu 3.1.1).

o The parent relationship can also be updated as the resident parent or the account payer.

o **Learner family report** (Menu 3.1.12) lists learners and their parent's details per class.

The following options exist to view and update family relationships:

2.2.5a View/ Edit Families: View a family based on a LEARNER			
SA-SAMS menu number & description		Fig. in guide	Content and functionality
3.1.1	**View Family**	Fig. 35	Select a learner and list: ➢ Parents address and contact details ➢ Remove Parent, Add Parent, ➢ Set Account Payer, ➢ Set residential Parent
2.2.5a View/ Edit Families: View a family based on a PARENT:			
3.1.11	**View Learners in Family** & **Manage family**	Fig. 36	Select a Parent and list ➢ Parents names ➢ Parents address and contact details ➢ All siblings ➢ Remove learner from list
3.1.11	**Edit learner parent relationship** (Accounts & residential parent)	Fig. 37	Per parent: ➢ Learners address & class ➢ All siblings ➢ Set Parent as Account Payer, Set Parent as residential Parent.

2.2.5b Lists with Parents only			
3.1.11	**Parent per family print outs**	Fig. 38	➢ Parent list for the whole school,
		Fig. 39	➢ Parents listed per class and select the class from the list.
3.1.11	**Parent listing per parent**	Fig. 41	➢ Parents listed with contact details (per grade /all)
			➢ Parents living together are listed separately for voting or counting purposes (**SGB**)
2.2.5c Lists of Learners WITH Parents			
3.1.11	**Parent per family print outs**	Fig. 38	➢ Parent listed per family: parent's contact details and all the siblings in the family
3.1.11	**Parent learner listing**	Fig. 42	➢ Learner and related parent contact details are listed per grade, class or the whole school.
3.1.12	**Learner Family Report**	Fig. 43	➢ Learner Family (siblings) with Parent Contact Details
3.1.13	**Learner Parent Export**	Fig. 44	➢ Full parent and learner lists

2.2.5a View/ Edit Families (Menu 3.1.1 & 3.1.11)

View a family from a learner:

✍ On menu 3.1.1 click on a learner and then click on **View Family.**

- The screen displays the learner and parent's contact details as well as all the siblings in the family (Fig. 35).
- The following functions are available: Remove Parent, Add Parent, Set Account Payer, Set residential Parent

Click on **Done** to exit the screen.

Figure 35: Family Details from Learner Information

View a family from a parent:

✍ On menu 3.1.11 click on **View Learners in Family (**or click on **Manage family)**

- Search for a parent by **filtering using the first letter** of the surname and then **select for the parent**.
- This will list the parent's contact details and all the siblings in the family (Fig. 36).
- Future learners are indicated in blue.

Click on **Done** to exit the screen.

Figure 36: Family Details from Parent Information

✍ On menu 3.1.11 click on **Edit parent Learner relationships** to edit the status of the account payers.
- Select a grade and select a learner from the drop-down lists (Fig. 37).
- This will list the learner with account number and parent's status as resident parent and account payer.
- The following functions are available: Set Parent as Account Payer, Set Parent as residential Parent.

Click on **Done** to exit the screen.

Figure 37: Parent as Payer and Resident Parent

2.2.5b View & Print Lists of Parent only (Menu 3.1.11)

Parents contact details are listed per grade, class or the whole school.

These lists can only be reviewed and printed per selected group and not be edited.

The following lists are available from Menu 3.1.11:

☞ On menu 3.1.11 click on a parent and click on **Parent per Family Printouts** (Fig. 38).

- Select a list from the following options:

    o Parent list for the whole school,

    o Parents listed per class and select the class from the list (Fig. 39).

    o Parent listed per family. This will list the parent's contact details and all the siblings in the family (Fig. 40).

- Click on **Print** and Click on **OK** to preview the list.

- Click on the **printer icon** to print hard copies.

Click on **Done** to exit the screen.

Figure 38: Options for Parent / Learner Printouts

Parent List for class:								
Surname	**Initials**	**Title**	**Postal Address**		**City\Suburb**	**Code**	**Email**	**Tel Num**
AARON	C.J.	Mr	PO Box 222		Pretoria	0001		012 - 7374100
ABBOTT	A	Mr	87 Smartt Road	WOODLEIGH		5241		

Figure 39: Example of Parent / Learner listing per Class

CLEVER KIDS HIGH SCHOOL		EMIS NO: 700890111		22/05/2013		
Parent , Learner List						
A A A	Postal Address :				Tel: -	Cell:
SS Ss		Gr 8	8 (1)			
Mr C.J. AARON	Postal Address : PO Box 222 Pretoria 0001				Tel: 012-7374100	Cell:
WEST Cornelius		Gr 10	10 -10			
ACTON Caitlyn		Gr 8	8 (4)			
SMITH James		Gr 7	7A			
Mr A ABBOTT	Postal Address : 87 Smartt Road WOODLEIGH 5241				Tel: -	Cell: 083274

Figure 40: Example of Parent and Family Listing

🖰 On menu 3.1.11 click on a parent and click on **Parent listing per parent** (Fig. 41).

- All active parents with ID numbers and contact numbers are listed separately.

  - Parents living together are listed separately for voting or counting purposes.

- Up to 3 Blank columns can be added to extend the printed list.

- Click on **Print list** to print the parent's list with additional columns.

- Click on **Export Data** to export the Parents data to an excel file.

Click on **Done** to exit the screen.

Parent Listing per Parent							
All active parents on the system are listed - parents living together are listed separately for voting or counting purposes.							
	Surname	Name	Gender	ID No	Tel	Cel ▲	Number of blank columns to print (0 - 3)
1	AARON	Jon	Male	6411055000089	0127374100		
2	Louise	WEST	Female	6205160000089			
3	ABBOTT	AK	M	5481295821000		00327586	

Figure 41: Parent listing per parent for SGB needs

2.2.5c View & Print Learner WITH Parent (Menu 3.1.11 & 3.1.12)

Learner and related parent contact details are listed per grade, class or the whole school.

- These lists can only be reviewed and printed per selected group and not be edited.

- Lists are available from

- Menu 3.1.11: **Parent and learner listing** (Fig. 42), **Parent per Family Printouts** (Fig. 38)

- Menu 3.1.12: **Learner Family Report** (Fig. 43)

- Menu 3.1.13: **Learner Parent Export** (Fig. 44)

◦ On menu 3.1.11 click on **Parent and learner listing** (Fig. 42).

- Select **a grade (or show all)** to view the parents with contact details and learners with class and contact details.

- Click on **Print** and Click on **OK** to preview the list.

    o Click on the **printer icon** to print hard copies.

- Click on **Export Data** to export the Parents data to an excel file.

Click on **Done** to exit the screen.
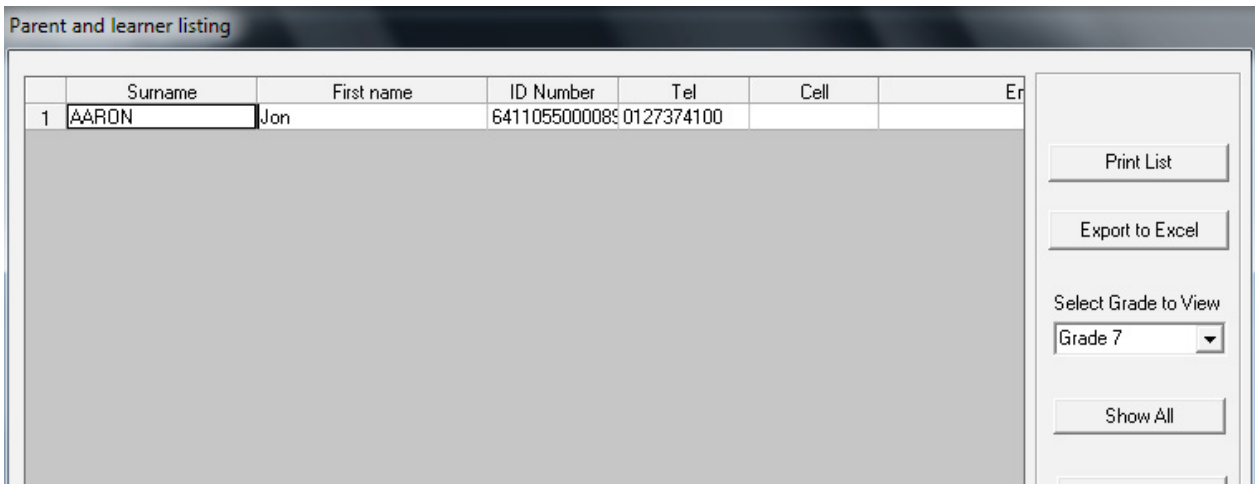
Figure 42: Parent and Learner Listing

◦ Click on menu 3.1.12 to list / print **learners with parent and their contact details** (Fig. 43).

- Click on **View for Whole School** OR

- Select a grade and select a class from the dropdown lists and click on **View Family**

- Learner count of the group will be displayed.

- Click on **Print** and click on **OK** to preview the list.

    o Click on the **printer icon** to print hard copies.

- Click on **Export Data** to export the Parents data to an excel file.

Click on **Done** to exit the screen.
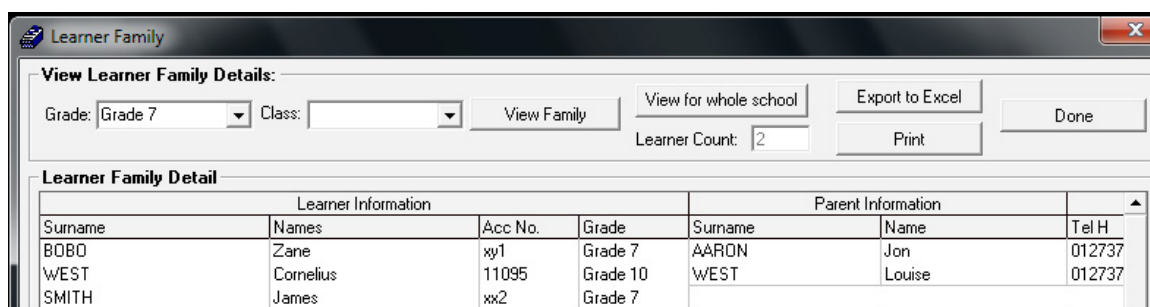
Figure 43: Learner Family with Parent Contact Details

☞ Click on menu 3.1.13 to view and print **full parent and learner lists** (Fig. 44).

- **All Grades** is set as default OR

- Tick on **All Grades** to deselect and select a **grade** and a **class** from the dropdown lists.

- Select **All Languages** to list all parents OR

  o Deselect **All languages** and choose the language of communication of the parents.

- Click on **Go.**

- Click on **Print Grid** and an insert screen will appear to inform you on the number of pages to be print. Click on **Yes** to confirm printing.

- Click on **Export to Excel** to export the data to an excel file and name the file.

- Click on **Reset** to clean the screen for a new selection.

Click on **Done** to exit the screen.

Figure 44: Learner Parent Export

2.3   Learner Records

Records additional to learner registration can be captured for future reference.
- o   These records are mainly collected in the period that the learner attended school.
- o   These records needs to be maintained when required and are the following:

  2.3.1 Participation in extra-mural activities (Menu 3.1.1& 3.5.7)
  2.3.2 Assign Learners to bus routes (Menu 3.9)
  2.3.3 Maintain RCL (Menu 3.1.1)
  2.3.4 Archived marks (Menu 3.1.1)
  2.3.5 Reported Incidents (Menu 3.1.1)
  2.3.6 Learner barriers (Menu 3.1.1)
  2.3.7 Assigned mentors (Menu 3.1.9)

2.3.1   Sport, Art & Culture Participation

Extra-Mural activities of learners are recorded as follows:

2.3.1a Add, edit and remove extra-mural activities (Menu 3.1.1)

On Menu 3.1.1 extra- mural activities can be added, changed or deleted as follows:
- Click on a **learner** and click on **Sport, Art and Culture** under records
- For the current year **Select a Term** (Fig. 45).
- Tick the appropriate activity for the term
- Add any comments on any achievements in the available box on the right.
- Click on **Save** to save updates

Click on **Done** to exit the screen.

Figure 45: Learner Participation in Extra-mural activities

On Menu 3.1.1 previous year's extra- mural activities can be viewed as follows:
- Click on a **learner** and click on **Sport, Art and Culture** under records
- Click on **Previous Year** and select the year

2.3.1b List and report on extra-mural activities (Menu 3.5.7)

The number of participants per extra-mural activity in a grade, class and for the total school are summarised in Menu 3.5.7.

🖑 The extra-mural activities are listed and reported as follows:

- Click on a **year** and **select a grade:**
  - If a **grade** is selected, then select a **class** and a **learne**r from the drop-down lists (Fig. 46).
  - If **all grades** are selected then select the options for the reports (Fig. 46).
- Click on **print** and **OK** for a print preview. (Fig. 47).
- Click on the **printer icon** to print hardcopies of the reports.

Click on **Done** to exit the screen.

Figure 46: Option Selection for Extra-mural Reports

EXTRA MURAL ACTIVITIES (2013)

	Athletics	Boxing	Chess	Choir	Clay Pigeon	Cricket	Dance	Debating Society	Drama	Hockey	Karate	Music	Netball	Rugby	Soccer	Softball	Tennis	Visual Art	Volleyball	Water Sports	Other	Total
Grade 12, Class: 12 (1)																						
MATTHEW, Cynthia	1							1			1		1									4
Total for Grade 12, Class: 12 (	1							1			1		1									4
Total for Grade 12	1							1			1		1									4
Report Totals:	3	1		4	1		1	3	1		3	2	1	2			3			1	1	27

Figure 47: Summary Report for Extra-mural Activities

3.3.2 Bus Routes (Menu 3.9)

Learner Transport can be managed using the **Bus Routes** menu (Fig. 48) to **assign learners to a bus route and printing learners' bus tickets** (passes) at the school.

- o This menu is dependent on the **bus route options (Menu 1.9) that were set up** in Module 1.

✍ Assign learners to a bus route using Menu 3.9:
- Select the **grade** and the **class**
- Click on the arrow in line with the Learner and select the bus route (Fig. 48).
Click on **Save** and **Done** to exit the screen.

✍ To print a bus ticket, click on **Print a Bus Ticket**
- Click on **Print**.

✍ To print a list of learners and their bus route
- Click on **Print Grid** to print the class with the assigned bus routes OR
- Click on **Print Options** and print All learners per bus Route
Click on **Save** and **Done** to exit the screen.
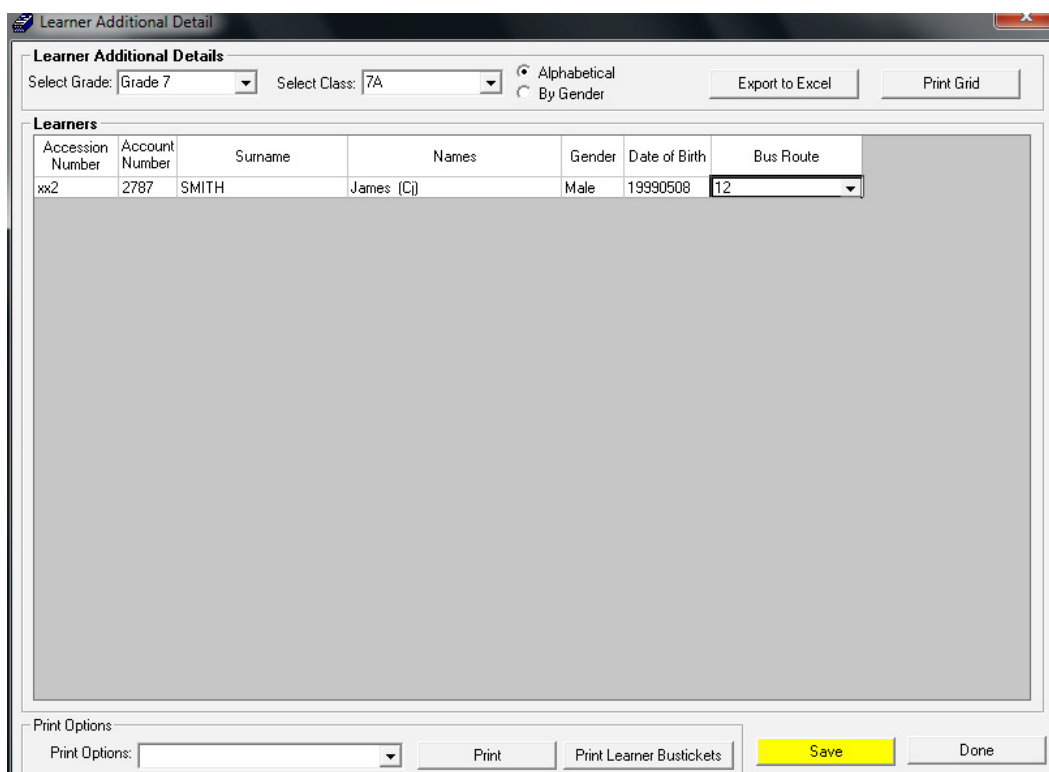
Figure 48: Assign Learners to a Bus Route and Print Bus Tickets

2.3.3 Maintain RCL members (Menu 3.1.1)

The **Maintain RCL** (Representative Council for Learners) menu is used to record and maintain RCL members.

2.3.3a Add, edit and remove RCL members (Menu 3.1.1)

✍ RCL membership can be added, changed or deleted on Menu 3.1.1 as follows:
- Click on a **learner** and click on **Maintain RCL**
- The members are listed as **Active** or **Past Non Active Members**
- Click on **Add New Member** (Fig. 49).
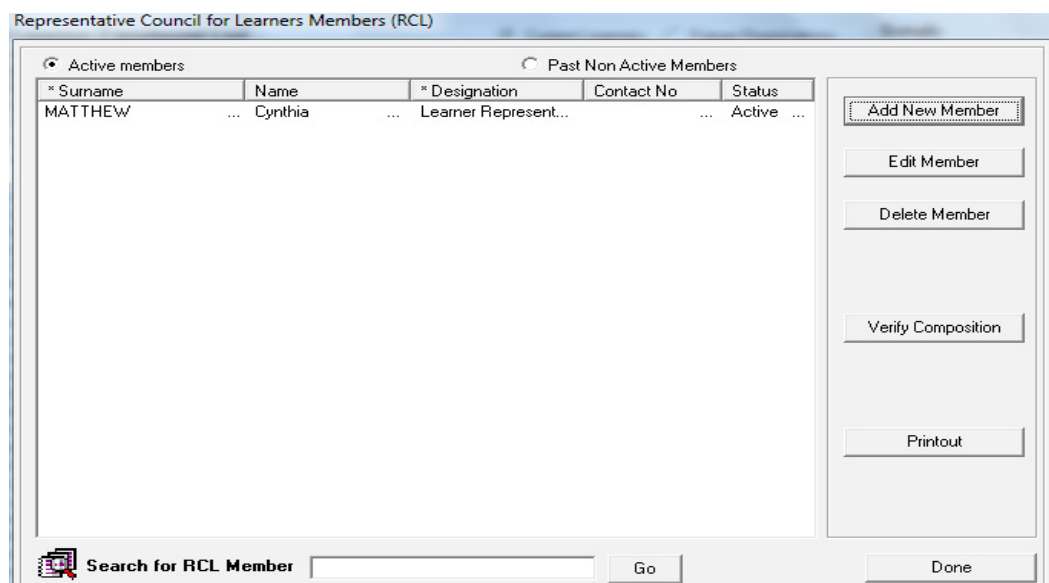
Figure 49: RCL Members

- Select as option **Learner Representative** at Type of Member Added (Fig.50).
- Select the learner from the available candidates in the relevant category will appear in the Select members box on the right OR
- Type the learner's surname in the search box and click on **GO** to find the learner.
- Click on a **selected learner** from the list to open the **Member Details** screen. (Fig. 51)

Figure 50: Maintain RCL membership

- Complete all the **contact details** of the member (Fig. 51).

- Select the capacity on RCL.

- Select the **date of election** from the calendar which will activate the active button.

- Click on **Save to RCL** and then on **Done** to exit the screen.

✒ The new member will be listed on the RCL member opening screen. (Fig. 49)

Click on **Done** to exit the screen.

Figure 51: Maintain RCL Member Details

⬩ Click on a selected member from the RCL Register (Fig. 49) and then click on **Edit Member**.

- Figure 51 will open with the member's current details.

- **Update** any changes to the details.

  o **Resignation** is updated by selecting **Active: No** The date of resignation will be automatically added or can be changed accordingly.

- **Save** any new data or change made and click on **Done** to exit the screen.

⬩ Click on a selected member from the RCL Register (Fig. 49) and then click on **Delete Member**.

- You will view the removal on the SGB membership register (Fig. 51)

2.3.3b List and report on RCL Members (Menu 3.5.7)

⬩ The **Verify Composition** is a summary of the RCL membership per grade as shown in Figure 52.

⬩ A full list of RLC Members can be viewed or printed by selecting the PRINTOUT from the RCL Members form.

RCL Composition

RCL Members per Grade	Number of Members
Grade 8	0
Grade 9	0
Grade 10	0
Grade 11	0
Grade 12	1
Total Number of RCL Members	1

Figure 52: RCL Composition

4   Marks Archive

The Marks Archive keeps records of all the marks a learner attained for all cycle tests or exams in previous years.

o The transcript report is based on marks that were captured on the **Curriculum Related Data** module.

o This is only a report with no addition or edit functions available.

⬩ Click on the learner and select the option to print learner transcript (Fig. 53).
- Click on **print** and **OK** for a print preview (Fig. 54).
- Click on the **printer icon** to print hardcopies of the report.
Click on **Done** to exit the screen.

Figure 53: Learner Transcript

Figure 54: Marks Archive Printout

2.3.5 Incidents (Menu 3.1.1)

This screen records all reported incidents that has an effect on the learner attendance and achievement for future reference and tracking purposes.

✍ On Menu 3.1.1 click on the selected **Learner** and then click on **Incidents** in the records box.
- All the recorded incidents with comments are listed as shown in Figure 55.
- Click on **Add** to add a new incident
- Add a **date** and select the **type of incident** from the following list: Pregnancy, Domestic Violence, racial conflict or choose other**.**
- Additional comments can be added for future reference.
    o   For **pregnancy** select the dates that the learner will be absent from school.

Click on **Save** and **Done** to exit the screen.

‿ Click on the incident to **Edit / update** (Fig. 55).
- Click on **Edit** and update the details on the screen.
Click on **Save** and **Done** to exit the screen.

‿ To delete Learning barrier click on the **Incident** (Fig. 55).
- Click on **Delete** and then on **OK** to confirm the action.

‿   To print a report on the incidents of the learner
- Click on **Print** and then **OK** to view the printout on a print screen (Fig. 55).
- Click on the **printer icon** to print a hard copy
Click on **Done** to exit the screen.

Figure 55: Maintain Incident Information of a Learner

2.3.6   Learning Barriers (Menu 3.1.1)

Reported learning barriers and support / actions can be recorded for reference and tracking.

‿ On Menu 3.1.1 click on the selected **Learner** and then click on **Learning Barrier**.
- All the recorded barriers, with action and comments are listed as shown in Figure 56.
- Click on **Add** to add a new incident.
  - o   Complete the incident by adding a **date** and selecting the **barrier type** and **Action taken** from the drop-down lists.
  - o   Additional comments can be added.
Click on **Save** and **Done** to exit the screen.

‿ To **Edit / update** Learning barrier click on the **Learning Barrier** (Fig. 56).
- Click on **Edit** and update the details on the screen.
Click on **Save** and **Done** to exit the screen.

‿ To delete Learning barrier click on the **Learning Barrier** (Fig. 56).
- Click on **Delete** and then on **OK** to confirm the action.

☞ To print a report on the learner barriers of the learner
- Click on **Print** and then **OK** to view the printout on a print screen (Fig. 56).
- Click on the **printer icon** to print a hard copy (Fig. 57).

Click on **Done** to exit the screen.
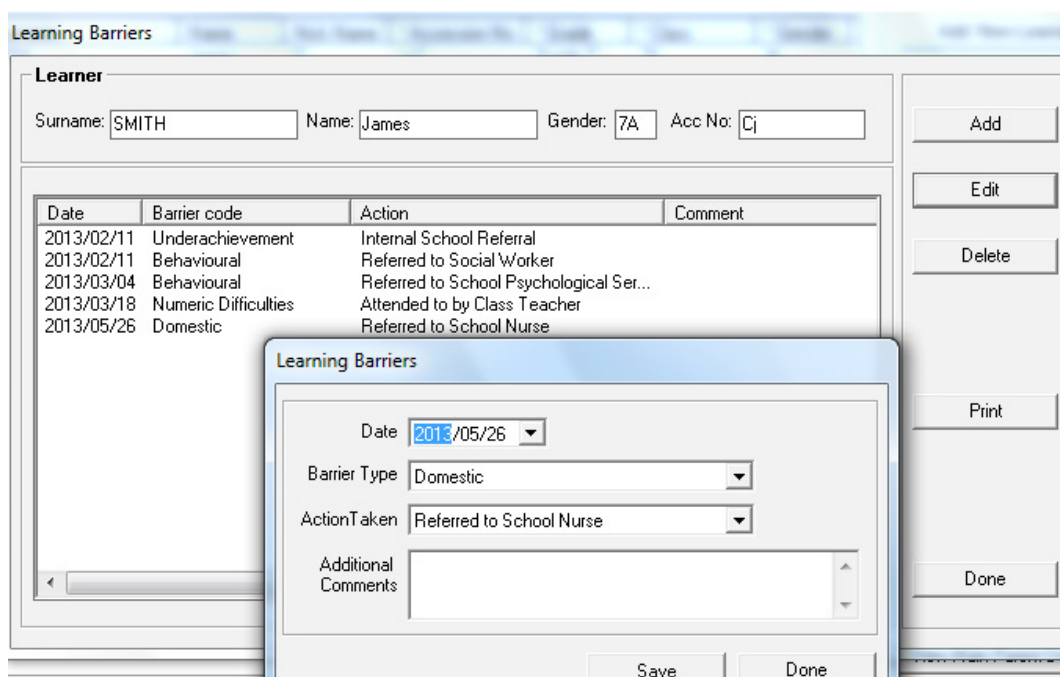
Figure 56: Maintain Learning Barriers of a Learner

The options available for the drop-down box are tabled below:

Drop-down Field	Options	
Barrier Type	• Numeric difficulties • Reading difficulties • Language difficulties • Speech deficit • Behavioural • Underachievement	• Domestic • Neurological • Physical / Medical • Truancy • School adaptation
Action Taken	• Attended to by class teacher • Internal school reference • Referred to School Psychological Services • Referred to Private Psychologist • Referred to social worker • Referred to Hospital • Referred to school nurse	

CLEVER KIDS HIGH SCHOOL   EMIS NO: 70089
INDIVIDUAL RECORD OF LEARNING BARRIERS

Learner: SMITH, James

Enrolment Date: 2013/02/20
                                                 Admission No: xx2
Gender: Male
                                                 Current Grade: Gr 7
                                                 Age of Learner: 14

Date	Barrier	Action	Comments
2013/02/11	Behavioural	Referred to Social Worker	
2013/02/11	Underachievement	Internal School Referral	
2013/03/04	Behavioural	Referred to School Psychological Services	
2013/03/18	Numeric Difficulties	Attended to by Class Teacher	
2013/05/26	Physical/Medical	Referred to School Nurse	

Figure 57: Report on the Learner Barriers of a Learner

2.3.7 Assign Mentor to a Learner (Menu 3.11)

Mentors can be assigned to a learner for support.

⍋ On Menu 3.1.11 select the grade and the class
  • Click on the arrow in line with the selected **Learner** and select a mentor from the dropdown list as shown in Figure 58.
  Click on **Save** and **Done** to exit the screen.

⍋ Top a report on the learner barriers of the learner
  • Click on **Print** and then **OK** to view the printout on a print screen (Fig. 58).
  • Click on the **printer icon** to print a hard copy (Fig. 58).
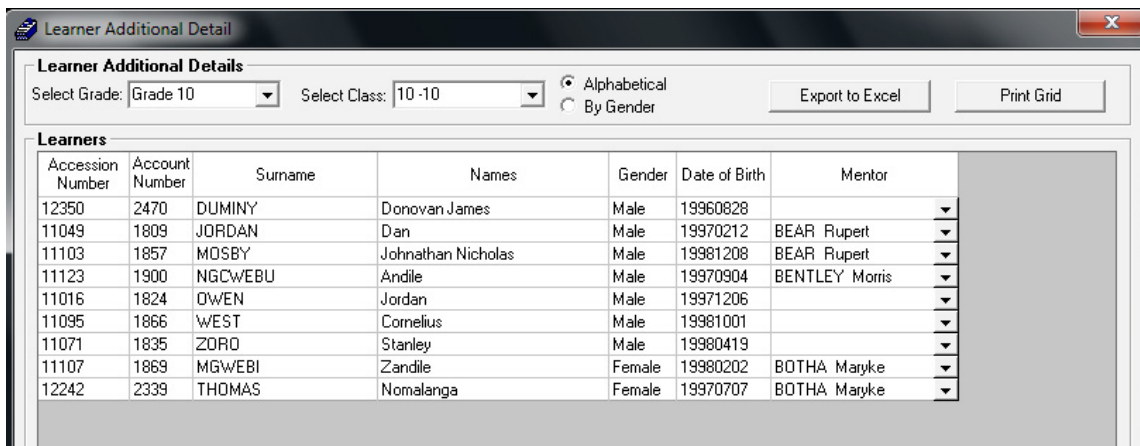Click on **Done** to exit the screen.

Figure 58: Assign Mentor to a Learner

2.4 Merit and Demerit (Menu 3.1.1 and 3.7)

The Merit & Demerit Menu assists the school to manage the disciplinary process at the school in conjunction with an award system.

- o   This section is dependent on the codes/actions that were setup in Module 1 (Menu 1.7).
- o   This system assists with managing the actions to a demerit incident into a system of detention. It also assists with "neutralizing" the demerit points with merit points.
- o   Reward and disciplinary are managed in different stages as follows:
- 2.4.1   Maintain Merit / demerit incidents
- 2.4.2   Detention and other actions management
- 2.4.3   Statistical reporting
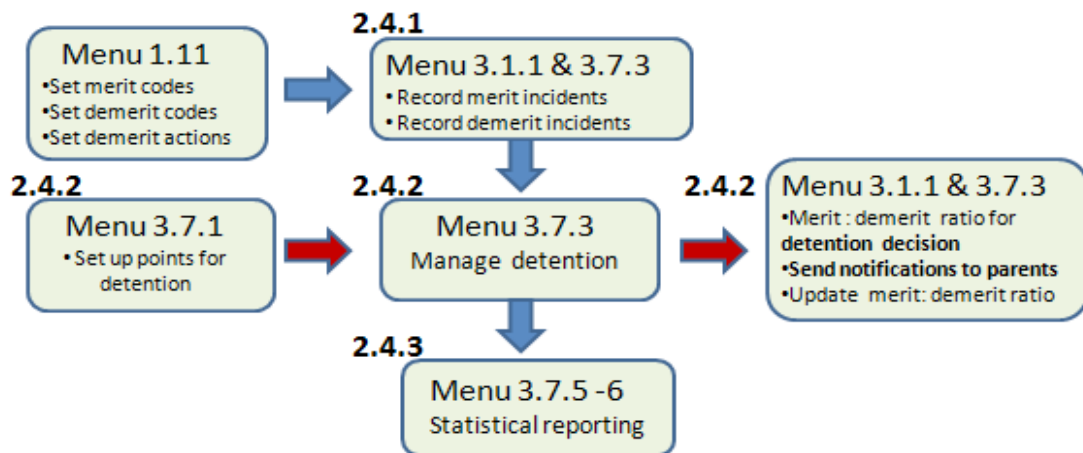
2.4.1 Maintain Merit / demerit incidents (Menu 3.1.1)

On Menu 3.1.1 click on the **learner** and then click on **Disciplinary Record**.

- The learner's demerit and merit records are listed as shown in Figure 59.
- On option is available to view the current year's list or previous year's list.

Figure 59: Disciplinary and Merit Records

2.4.1a Add, Edit and Remove Merits (Menu 3.1.1)

Merit incidents can be recorded on **Learner Information** (Menu 3.1.1) and **Manage Learner Merit / Demerit** (Menu 3.7.3).

Menu description	Figure	Functionality
Menu 3.1.1 : **Learner Information**	Fig 60	Capture incident per learner
Menu 3.7.3 : **Manage Learner Merit / Demerit**	Fig 61	Capture & add incident to more than one learner

On **Learner Information** (Menu 3.1.1)

✍ Click on **Add record** (Fig. 59) and select for **Merit** to capture a rewarding incident.
 • Complete all the details on the screen. (Fig. 60).
 Click on **Save** and then on **Done** to exit the screen.

✍ Click on a record and select **edit record** (Fig. 59).
 • Edit the details of the incident (Fig. 60).
 Click on **Save** and then on **Done** to exit the screen.

✍ Click on a record and select **delete record** (Fig. 59).
 • Click on yes to confirm removal of the record.

Figure 60: Add/ Edit Merit Records on Menu 3.1.1

✍ Click on **Print** and then **OK** to view the printout on a print screen
 • Click on the **printer icon** to print a hard copy.
 Click on **Done** to exit the screen.

On Manage Learner Merit / Demerit (Menu 3.7.3):
Add & edit on Demerit / Merit menu (3.7.3)
✍ Select **Assign Merit to learners** (Fig. 61) at Select Option.
 • Select the **Grade** or Class to search for a **learner.**
 • Select the Level, code and description from the drop-down lists as set up in Module 1.
 • Select the person who reported the incident and the date.
 • Tick in the box next to the applicable Learners' names to confirm (Fig. 61).
 Click on **Save** and then on **Done** to exit the screen.

Figure 61: Add/ Edit Merit Records on Menu 3.7.3

2.4.1b Add, edit and remove Demerit Incident (Menu 3.1.1 OR 3.7.3)

Add & edit on Learner Information menu (3.1.1)

✍ Click on **Add record** (Fig. 59) and select for **Demerit** to capture a disciplinary incident.
- Select the Level, code and description from the drop-down lists as set up in Module 1.
- Select the person who reported the incident and the date.
- If applicable select the details on the action taken (Fig. 62).
- Click on the option **Demerit to add to Parent's Notification Slip**.

 Click on **Save** and then on **Done** to exit the screen.

✍ Click on a record and select **edit record** (Fig. 59).
- Edit the details of the incident (Fig. 62).

 Click on **Save** and then on **Done** to exit the screen.

✍ Click on a record and select **delete record** (Fig. 59).
- Click on yes to confirm removal of the record.

✍ Click on **Print** and then **OK** to view the printout on a print screen OR
✍ Click on **Parent slip** and then **OK** to view the printout on a print screen (Fig. 64).
- Click on the **printer icon** to print a hard copy.

 Click on **Done** to exit the screen.

Figure 62: Add / Edit Disciplinary Records on Menu 3.1.1

Add & edit on Demerit / Merit menu (3.7.3)
☞ Select **Assign Demerit to learners** (Fig. 63) at Select Option.
- Select the **Grade** or Class to search for a **learner.**
- Select the Level, code and description from the drop-down lists as set up in Module 1.
- Select the person who reported the incident and the date.
- Tick in the box next to the applicable Learners' names to add the incident (Fig. 63).
    o This function can be used when the same incident is added to a group of learners.
Click on **Save** and then on **Done** to exit the screen.

Figure 63: Add / Edit Disciplinary Records on Menu 3.7.3

2.4.2 Managing Detention and other disciplinary actions (Menu 3.7)

2.4.2a Maintain Detention Set-up (Menu 3.7.1)

🖰 Click on **Demerit / Merit Settings** and set up the system for detention (Fig. 64).

• Select the time start and finish, the days and the number of points for short medium and long detention.

Click on **Save** and then on **Done** to exit the screen.

Figure 64: Set up for Detention

2.4.2b Maintain Learners for Detention (Menu 3.7.3)

On Manage Learner Merit / Demerit (Menu 3.7.3):

✔ Select **View Detention List** (Fig. 65) at Select Option.
- Select the **Grade** or Class if you need to search for a **learner.**
- Tick in the box next to the applicable Learners' names to confirm (Fig. 65).

Click on **Save** and then on **Done** to exit the screen.

Figure 65: View Detention list

✔ Click on **Print Detention or Print Demerit / Merit Scores** and then **OK** to print a hardcopy of the screen (Fig. 65).

Click on **Done** to exit the screen.

2.4.2c Detention Notification (Menu 3.7.3)

☞ Click on **Print Detention Notification** (Fig. 65) and click **on a learner** or **tick select all** to print a notification letter to the parents (Fig. 66).

• Click on **OK** for a print preview and then click on the **printer icon** to print a hard copy (Fig. 67). Click on **Done** to exit the screen.
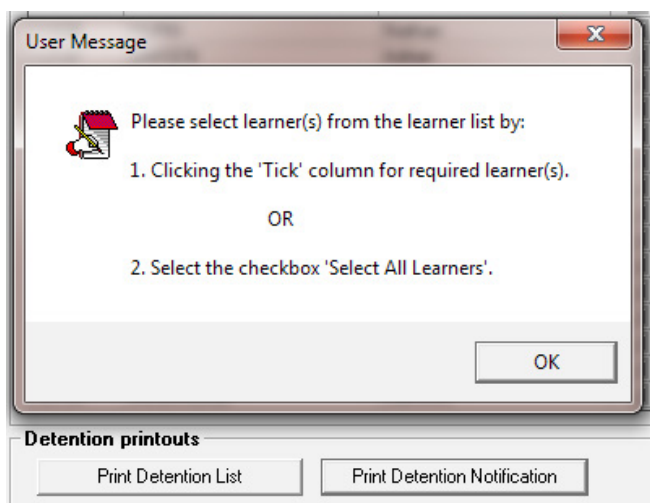
Figure 66: Detention Notification Selection

Figure 67: Example of Demerit Notification Letter to Parent

2.4.3 Print Merit / Demerit Reports

2.4.3a Print Reports of a learner on Merit / Demerit (Menu 3.7.5)

✍ Click on **Print Learner Demerit / Merit Score lists** and select the options for the type of report (Fig. 68).

- Select to print the history of 1 learner per page or fit more than one learner per page (Fig. 69).
- Click on **OK** for a print preview and then click on the **printer icon** to print a hard copy.

Click on **Save** and then on **Done** to exit the screen.

Figure 68: Option to Print Demerit /Merit List per Learner

Figure 69: Example of Demerit/ Merit List per Learner

2.4.3b Print Merit / Demerit Report (Menu 3.7.6)

✍ Click on **Print Demerit / Merit Report** to print **summary reports** and select the options for the type of report as shown in (Fig. 70).

- Insert screens will appear to narrow down the period, specify the type of merits/demerits and others.
- Click on **OK** for a print preview and then click on the **printer icon** to print a hard copy (Fig. 71).

Click on **Save** and then on **Done** to exit the screen.

Figure 70: Options for Demerit/ Merit Reports

Figure 71: Example of a Merit/ Demerit Report

2.5 Learner Attendance (Menu 3.3)

This section assists with the administration of learner attendance. Quarterly reports are available at a click of a button if the learner attendance data was captured weekly.

o   The different functions available on SA-SAMS regarding learner attendance is shown in Figure 72.

o   The administration and reporting sections can be divided into 2 sections according to the specific purposes as summarised in the table that follows.

Figure 72: Learner Attendance Data Menu

The table below shows the relevant headers that are used in this manual with reference to the SA-SAMS:

Header	SA-SAMS menu number	Figure	Functionality
2.5.1 Maintain learner attendance	2.5.1a Blank attendance register (Menu 3.3.1)	Fig 73	➤ Blank form for manual capturing of attendance per month or per week
	2.5.1b Maintain weekly learner attendance (Menu 3.3.3)	Fig 74 & 75	➤ Learner attendance entered on the system per day for a week ➤ Absenteeism documents recorded ➤ Reports & Stats per week
	2.5.1c Maintain Absenteeism per Period (Menu 3.3.7)	Fig 76 & 77	➤ Attendance per period per day ➤ Comment & documents recorded
2.5.2 Learner attendance reports	2.5.2a Learner absence notification (Menu 3.3.2)	Fig 78	➤ Warning screen showing all learners that are absent for more than 10 days without a reason.
	2.5.2b Absentees Reports per Learner (Menu 3.3.4)	Fig 79 & 80	➤ List & print DAILY learner absences
	2.5.2c Attendance Details (Menu 3.3.4 & 3.3.11)	Fig 81 -84	➤ List & print learner absences for a period, week, quarter and year
2.5.3 Summary attendance reports	2.5.3a Total of days absent per learner (Menu 3.3.13)	Fig 85 & 86	➤ List & print learner summary of days absent per period
	2.5.3b Weekly / Monthly Learner Attendance Summary per Class (Menu 3.3.14)	Fig 87 & 88	➤ Summary list per class & gender: no of learners that are absent, present, possible attendance & % present.
	2.5.3c Weekly Learner Attendance Summary per Class & Grade (Menu 3.3.15)	Fig 89	➤ Summary grid possible and actual attendance for selected week, per gender
	2.5.3d Quarterly Attendance (Menu 3.3.16)	Fig 90 & 91	➤ Attendance and absenteeism for the Quarter selected, per gender and all learners per grade.

Each of the functions will be discussed individually under the related sections.

2.5.1 Maintain Learner Attendance (Menu 3.3.1, 3.3.3 & 3.3.7)

Learner attendance can be "paperless" administered with supporting source documents for audit purposes. This will also save time of the teachers and admin staff and assist the SMT with management of the absenteeism.

2.5.1a A **blank register** can be printed per class to mark the absenteeism manually.

- These lists are populated with learner names and saves the educator in writing down or admin clerk to type an excel spread sheet.

2.5.1b Capture manually recorded **weekly attendance** on the system.

- Weekly attendance statistics available for SMT after capturing

- List available with learners absent for a day

2.5.1c Capture manually recorded **attendance per period** on the system

- List available with learners absent for periods on that day

2.5.1a Print Blank Daily Attendance Register (Menu 3.3.1)

A blank attendance register can be printed to mark the absenteeism manually for later capturing on the system.

✍ For a Monthly Register printout select the **Month, Grade** and **Class** from the drop-down lists (Fig. 73)

- Tick if **Nicknames** should be included

- Tick if the list should be **alphabetica**l and if the **gender** be split.

- Click on **Print attendance register**

Click on **Done** to exit the screen

✍ For a Weekly Register printout selects the **Month, Class** (or select for all classes) and **Week** from the drop-down lists (Fig. 73)

- Tick if **Nicknames** should be included for easy identification.

- Tick if the list should be alphabetical and if the gender be split.

- Click on **Print attendance register**

Click on **Done** to exit the screen
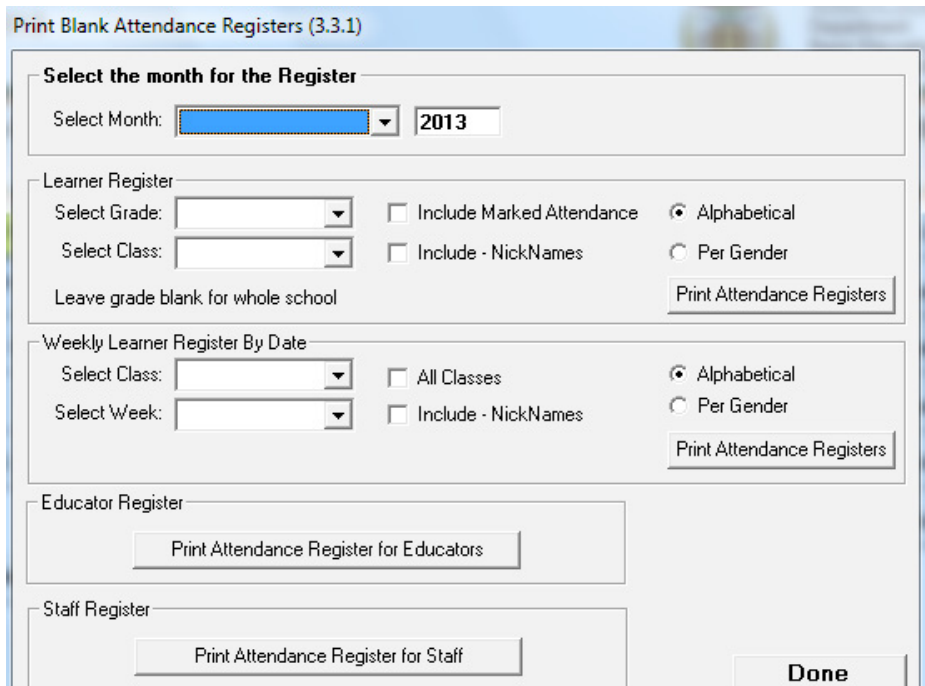
Figure 73: Print Blank Attendance Registers

2.5.1b Maintain Weekly Learner Attendances (Menu 3.3.3)

Learner attendance MUST be maintained weekly in order to generate weekly & quarterly statistics.

✍ In case of full (100%) attendance, select the term, week and class and click on **Save**.

Click on **Done** to exit the screen.

✍ Maintain the attendance of the learners per week as follows (Fig. 74):

- Select the **term** from the drop-down list and click on the **week for capturing**.

- Select if the learners should be listed **alphabetically or per gender**

- Click on the **class** to populate the learners.

- **Tick on the days** that the learners were **absent**, the day absent for the learner will be highlighted in red with an "a".

  o Public and school holidays are grayed out and cannot be marked.

- When completed click on **Save.**

  o The attendance statistics per class can be viewed at the bottom of the screen and be printed.

- Click on **Add Reason/Commences** (Fig. 75) to record comments and reference to documentation.

- Click on **Save Reasons**

Click on **Done** to return to Learner attendance screen.

Figure 74: Learner Attendance

Figure 75: Reason for Learner Absence

2.5.1c Maintain Attendance per Period (Menu 3.3.7)

☞ Learner attendance can be captured per period as follows (Fig. 76):

- Select the **term** and **week** from the drop-down list and click on the **day** of capturing.

  o Public and school holidays are grayed out and cannot be marked.

- Select if the learners should be listed **alphabetically or per gender**

- Click on the **class** to populate the learners.

- Click on the applicable learner to populate a timetable.

- **Tick on the periods** that the learner was **absent**

- When complete click on **Save.**

- Click on **Print Learner absenteeism** (Periods) to print a hardcopy for filing.

- Click on **Add Reason/Commences** (Fig. 77) to record comments and reference to documentation.

- Click on **Save Reasons** and click on **Done** to return to Learner attendance screen.

Click on **Done** to exit the screen.

Figure 76: Maintain Learner Absence (Period)

| Day: 2013/01/16, Class: 9-9, SMITH, Kaitlin (F) ||
Perio	Subject / Reason
1	Afrikaans First Additional Language (Gr 9)
	Latecoming
5	Social Sciences (Gr 9)
	Sent to HOD office
7	Mathematics (Gr 9)
	Banking

Figure 77: Reason for Learner Period Absence

2.5.2 Reporting on Attendance per Learner

Learners' absenteeism can be listed for a selected period and be printed from the following sub-menus: 3.3.4, 3.3.5, 3.3.11 & 3.3.12.

Header	Sub-menu	List that shows days absent per week per learner						
		Select Grade & Class	For all learners only	Per learner	Year to date	Selected period	Week selection	Quarter selection
2.5.2a	3.3.2 (Fig. 78)			x	Days absent			
2.5.2b	3.3.4 (Fig. 79 & 80)	x	x	Per day			
2.5.2a	3.3.5 (Fig. 81)	x	x	x	x	x		
2.5.2a	3.3.11 (Fig.)		x		x	x	x	
	3.3.12 (Fig.)	x	x	x	x	x	x	x

2.5.2a Notification of learners absent for more than 10 days (Menu 3.3.2)

A notification screen (Fig. 78) appears when the learner menu is opened.

This screen lists the learners that are absent for more than 10 executive days without a reason.

✍ To remove the learner from the notification screen add a reason to one of the days absent (Fig. 75).

Click on **Done** to exit the screen.

Figure 78: Notification Screen on Learners Absenteeism of More Than 10 Consecutive Days

2.5.2b Learner Absences listed per Day (Menu 3.3.4)

A list of **all learners absent for the day** can be listed per class.

✍ On Menu 3.3.4 click on **Print DAILY Absentees**:

- Select the **term** from the drop-down list (Fig. 79).

- Click on the **week** and **day** for reporting.

- Click on **Print** and then click on **OK** on the print pop-up screen.

- A list with all the absent learners for the day is shown on a print preview (Fig. 80).

- Click on the **print icon** to print a hardcopy.

Click on **Done** to exit the screen.

Figure 79: Print List of Learners Absent for a Particular Day

Figure 80: Example List of Absent Learners

2.5.2c Print Learner Absentees Records (3.3.5 & 3.3.11)

↱ Click on **View individual Learner Absences** 3.3.5 (Fig. 81):

- Select the **Grade** and **Class** from the drop-down lists.

- Click on the **selected learner** to populate all the dates absent with available reasons.

  o Select to print **All dates for the current year** OR

  o Select to print **Filter by date** and enter **initial and final date** and click on **GO.**

- The learner's names with total days absent are available to view.

- Click on **Print Selected Learner** OR **Print All Learners** (class) and then click on **OK** on the print popup screen.

- A list with all the absent learners for the day is shown on a print preview (Fig. 84).

- Click on the print icon to print a hardcopy.

Click on **Done** to exit the screen.

Figure 81: Learner Absentees Records

✍ All learners are printed in **Daily Attendance Details per Learner** (Menu 3.3.11) (Fig. 82)

- Tick to print **per week** that is indicated by a Friday for that week OR

- Select to print **for a period** that is indicated by an initial and final date OR

- To print all dates available for the year.

- Click on **Print** and then click on **OK** on the print popup screen.

- A list with all the absent learners for the period is shown on a print preview (Fig.).

- Click on the print icon to print a hardcopy.

Click on **Done** to exit the screen.

Figure 82: Select for Learner Absentees Records

✍ Select the options in **Attendance Detail report (**Menu 3.3.12) as shown in Figure 83. .

- Click on **Print** and then click on **OK** on the print popup screen.

- A list with all the absent learners for the period is shown on a print preview (Fig. 84).

- Click on the **print icon** to print a hardcopy.

Click on **Done** to exit the screen.

Figure 83: Select for Learner Absenteeism List

Figure 84: Example of Print List of Learner's days absent per week

2.5.3 Statistics and Summary Reports on Learner Attendance

2.5.3a Summary of days absent per learner (Menu 3.3.13)
☞ On Menu **Total Days Absent per learner** select the period of reporting (Fig. 85).

- Click on **Print** and then click on **OK** on the print popup screen.

- A list with all the absent learners for the period is shown on a print preview (Fig. 86).

- Click on the arrow to view the different classes.

- Click on the print icon to print a hardcopy.

Click on to exit the screen.
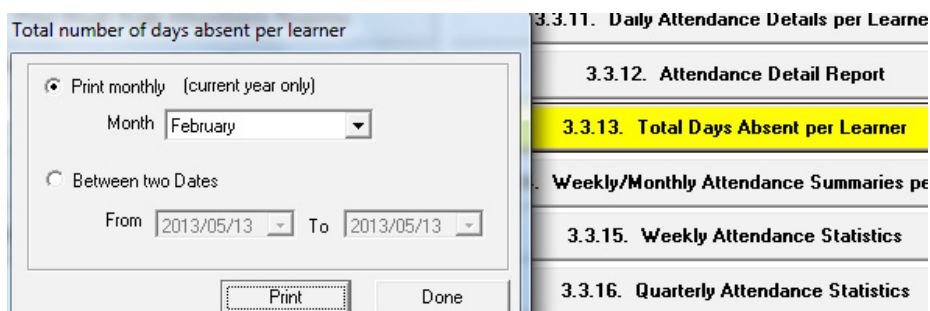
Figure 85: Report on Total Number of Days Absent per Learner

CLEVER KIDS HIGH SCHOOL   **EMIS NO: 700890111**

Summary of Learner Absentees per Class for: February

Class:10 -10

Surname & First Name	Admission No	Gender	No of Days Absent
DUMINY, Donovan	121337	Male	3
JORDAN, Dan	121166	Male	
MGWEBI, Zandile	111012	Female	2
MOSBY, Johnathan	121211	Male	
NGCWEBU, Andile	111232	Male	
OWEN, Jordan	110163	Male	
THOMAS, Nomalanga	122424	Female	
WEST, Cornelius	110955	Male	1
ZORO, Stanley	110716	Male	1

Figure 86: Example of Print List of Learner's days absent per week

2.5.3b Weekly / Monthly Learner Attendance Summary per Class

The summary list includes the following per class and gender: Nr of learner, nr absent, nr present, possible attendance for the period & % present.

◌ Select the period of reporting as shown in **Weekly / Monthly Learner Attendance Summaries** 3.3.14 (Fig. 87).

- Click on **Print** and then click on **OK** on the print popup screen.

- Learner attendances are **summarised per class** for the period as shown on a print preview (Fig. 88).

- Click on the print icon to print a hardcopy.

Click on **Done** to exit the screen.

Figure 87: Report on Total Number of Days Absent per Learner

ATTENDANCE STATISTICS:

8 (1)

Stats for the week: 2013/02/01

Gender	Enrolment	No Absent	No Attendance	Possible Attendance	Average Attendance %
Female	16	4	76	80	95
Male	13	0	65	65	100
Total	29	4	141	145	97

8 (2)

Stats for the week: 2013/02/01

Gender	Enrolment	No Absent	No Attendance	Possible Attendance	Average Attendance %
Female	15	3	72	75	96
Male	12	1	59	60	98
Total	27	4	131	135	97

8 (3)

Stats for the week: 2013/02/01

Figure 88: Example of Print List of Learner's days absent per week

2.5.3c Weekly Learner Attendance Summary per Class & Grade (Menu 3.3.15)

The summary grid includes the possible attendance and actual attendance for the week selected, per gender and all learners per grade and class.

☞ Select the term and week for reporting as shown in **Weekly Attendance return** (Fig. 89).

- A summary grid is populated with all learner attendance data showing for all grades.

- Click on a grade to view the attendance statistics of the individual classes.

- Click on the **Print** options to print the summary grids.

Click on **Done** to exit the screen.
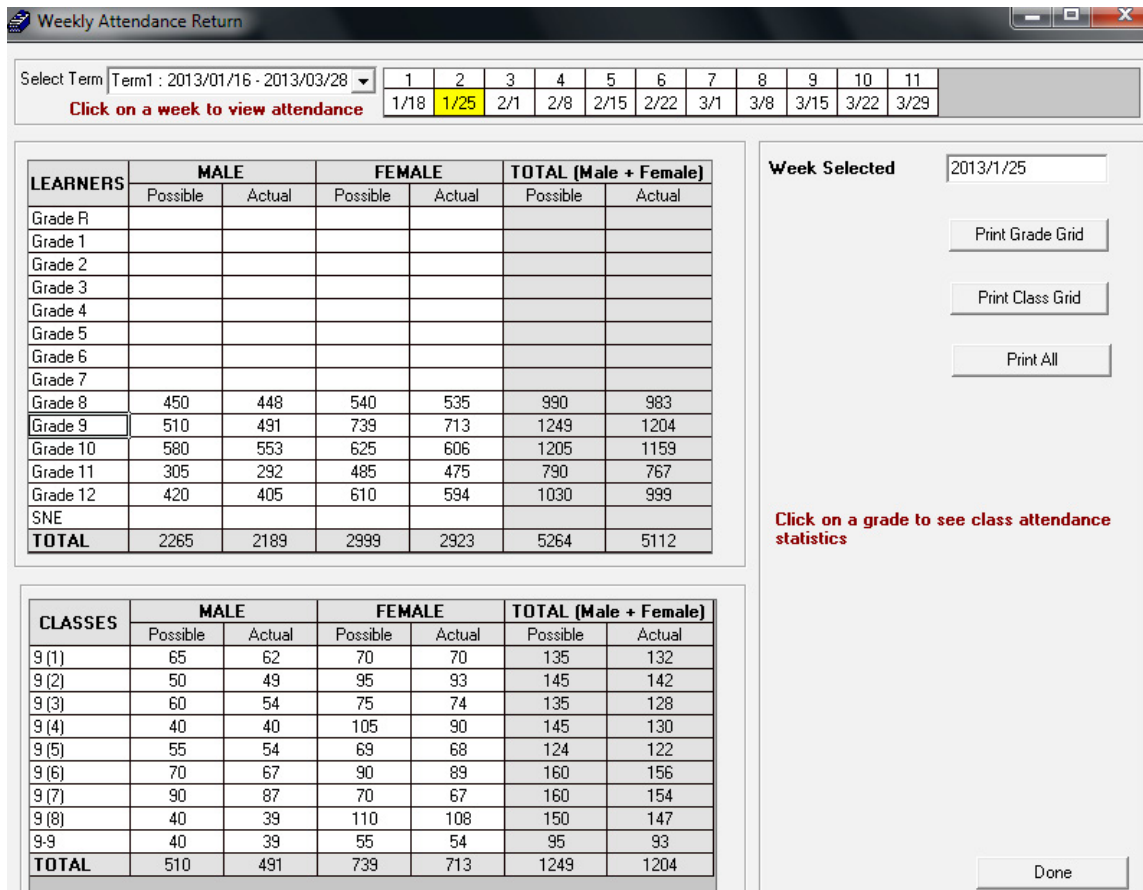
Figure 89: Weekly Attendance Statistics

2.5.3d Quarterly Attendance

This summary report includes the attendance and absenteeism for the Quarter selected, per gender and all learners per grade.

✍ Select the year and term for reporting in **Quarterly Attendance return** (Fig. 90).

- A summary grid is populated with all learner attendance data showing for the grades selected (Fig. 91).

- Click on the **Print** options to print the summary grids.

Click on **Done** to exit the screen.

Figure 90: Print Quarterly Attendance

Figure 91: Print Quarterly Attendance Reports

2.6 Statistical data & reports (Menu 3.5)

This section groups all the menus related to learner information that will assist the school management with Quarterly reports and surveys. The following options are available on SA-SAMS as shown in Figure 92.

Figure 92: Statistical Data and Reports

2.6.1 Enrolment Printouts (3.5.1)

This menu prints lists of current learners, boarders and future learners.

☞ Click on **Enrollment printouts.**

- Select the options of the report with learners to be printed (Fig. 93).

- Click on **Preview Enrollment Report** and then **OK** to view the report on the preview screen (Fig. 94).

- Click on the **Printer icon** to print a hardcopy of the report.

Click on **Done** to exit the screen.

Figure 93: Learner Reports

Figure 94: Examples of Lists with Learners

2.6.2 Learner Age & House Group List (Menu 3.5.2)

This menu is specifically for printing Age Group Lists of learners. It indicates all the printout options available under Learner Enrolment per age group. Age group Reports give two options for printing:

- School age group OR
- House age group

☞ Click on **Learner Age & House Group List.**

- Select the options of the report with learners to be printed (Fig. 95).
- Click on **Print** and then **OK** to view the report on the preview screen (Fig. 94).
- Click on the **Printer icon** to print a hardcopy of the report.

Click on **Done** to exit the screen.

Figure 95: Age Group Printout Menu

2.6.3 Learners & Extra-mural (Menu 3.5.3)

The number of participants per extra-mural activity in a grade, class and for the total school are summarised in Menu 3.5.7. (Fig. 96)

• This report is discussed under Learner records in this manual.

Figure 96: Example of a Printout of Extra-mural Activities per Learner

2.6.4 Details of SNE Learner (Menu 3.5.4)

Learners are listed with recorded disabilities. This list also reports on if learners are attending separate classes or is placed in mainstream education.

✐ Click on the **grade** and **class** to filter for the learners.

- Select the options of the report with learners to be printed (Fig. 97).

- Click on **Print** and then **OK** to view the report on the preview screen.

- Click on **Export to excel** to copy the data in a file for retrieval.

Click on **Done** to exit the screen.

Figure 97: SNE learner details Menu

3.6.5 Learner Details Data Printouts (Menu 3.5.4)

Lists of Learners can be customised according to the data needed as shown in Figure 98.

✐ Click on the **grade** and **class** to filter for a group of learners.

- Select the categories to be added **From Select Data To View**.

- Click on **All Learners in this Category** to view a group that is independent of grade and class.

- Click on **Print** and then **OK** to view the report on the preview screen.

- Click on **Export to excel** to copy the data in a file for retrieval.

Click on **Done** to exit the screen.

Figure 98: EMIS Details Data Printout

Drop-down Fields	Options
Select Data to View	➢ Learner Distribution Table 2.1
	➢ Hostel Boarders Table 2.2
	➢ Learner Population Group Table 2.3
	➢ PSNP Table 2.4
	➢ Language Data Tables 2.6 – 2.8
	➢ LSEN in Mainstream Table 2.9
	➢ LSEN in Mainstream according to learning barriers Table 2.10
	➢ Learner pregnancy in previous year Table 2.11
	➢ Learner Pregnancy
	➢ Number of transfers into the school Table 2.12
	➢ Grade 1 Pre Primary Programmes Table 2.15
	➢ Learners with deceased parents Table 2.17
	➢ Learners registered for social grants Table 2.18
	➢ Learners with divorced parents

3.6.6 Learner Aggregate Data Printout

This section summarises and reports according to the data needed as shown in Figure 99 and summarized in the table.

✍ Click on any of the reports shown in Figure 99.

• Click on **Print** and then **OK** to view the report on the preview screen (Fig. 100)

Click on **Done** to exit the screen.

SA-SAMS : School Administration and Management System
3.5.6. LEARNER AGGREGATED DATA PRINTOUTS

Test

3.5.6.1. Learners according to Grade, Population Group and Gender	3.5.6.11. Transfers into the School
3.5.6.2. SNE according to Disability, Population Group and Gender	3.5.6.12. Annual Survey Mortality Statistics (Previous Year)
3.5.6.3. Learners according to Age, Grade and Gender	3.5.6.13. Current Mortality Statistics
3.5.6.4. Learners according to Home Language and Grade	3.5.6.14. FET Subjects Grade 10 to 12 per population group
3.5.6.5. SNE according to Home Language and Disability	3.5.6.15. SNE Learners in Mainstream Classes
3.5.6.6. Learners according to Language of Teaching and Learning	3.5.6.16. Number of Learners Registered for a Social Grant
3.5.6.7. SNE according to Language of Teaching and Learning	3.5.6.17. Number of Learners with Deceased Parents
3.5.6.8. Learners according to Preferred Language and Grade	3.5.6.18. Mode of Transport
3.5.6.9. Preferred Language for SNE learners	
3.5.6.10. Grade 1 Enrolments	<< Statistical Data and Reports

Figure 99: Aggregate Reports

Report Available	Menu Nr	Available categories on report					
		Grade	Age	Population group	Gender	Language	Disability
Learner related	3.5.6.1	x		x	x		
	3.5.6.3	x	x		x		
	3.5.6.4	x				Home language	
	3.5.6.6	X				LoLT	
SNE related	3.5.6.2	X		x	x		x
	3.5.6.5	X				HL	x
	3.5.6.7	X				LoLT	
SNE Learners in Mainstream	3.5.6.15	X			x		x
Grade 1 enrolments	3.5.6.10				x		
FET subjects Grade 10-12	3.5.6.14	X		x			
Transfers into the school	3.5.6.11	X					
Nr of learners registered for social grants	3.5.6.16	X			x		
No of learners with deceased parents	3.5.6.17	X			x		
ASS Mortality (previous year)	3.5.6.12	X			x		
Current mortality	3.5.6.13	X			x		
Mode of transport	3.5.6.18	x					

NUMBER OF LEARNERS WHOSE PARENT(S) ARE DECEASED:

Grade	Male			Female		
	Only Mother	Only Father	Both Parents	Only Mother	Only Father	Both Parents
Grade 7						
Grade 8						
Grade 9	2	3		1	4	1
Grade 10	3	2		1	5	
Grade 11	1	1	1		7	
Grade 12	2	11		2	11	1
Total	8	17	1	4	27	2

Figure 100: Example of a Deceased Parent Report

Transport Statistics

Statistics on Learner Modes of Transport

Grade	By Foot 2 km or less	By Foot 2 km to 5 km	By Foot 5 km +	Bicycle	Motor Cycle	Motor Car	Taxi	Employer Bus	Bus Transport Scheme	Hostel	Train	Total
Grade 7												
Grade 8												
Grade 9												
Grade 10												
Grade 11						1						1
Grade 12	1					4	1					6
Remedial												

Print Grid

Figure 101: Examples of Mode of Transport Report

C. Summary

The **Learner and Parent Information Module** and **Learner Listing Module** (Fig. 1) assist schools with the administration of the biographical data of learners and parents information.

- o It also contains the processing and administering of attendance, disciplinary and extra-mural functions. (Included in chapter 1)

- o This module also assists with the administration of the promotion procedures and placing of learners in register classes. (Included in chapter 2)

3.1 Quick reference of the sub-menus and their uses:

The administration and management functions regarding the learner data and parents information can be divided into 6 sections according to the specific purposes. These sections are tabled below with the relevant headers and SA-SAMS menus that are used in this manual:

Header & (SA-SAMS menu number)		Functionality
2.1 Learner biographical information & LSEN	2.1.1 Learner biographical data (3.1.1 & 4.1)	• View learner profile • Learner information: add, edit and print
	2.1.2 Learner archive	• Archive learner • Restore a learner • Print a transfer card
	2.1.3 Learner application (3.1.2)	• Learner applications • Blank application forms
	2.1.2 SNE Learners	• SIAS for SNE Learners
2.2 Parent information	2.2.2 Parent information	• Parent information: add, edit and print • Parent archives • Learner family relationship summary • Learner/parent listed & exported • Parent only lists for SGB

2.3 Learners: additional functions	2.3.1 Participation in extra-mural activities (Menu 3.1.1& 3.5.7)	• Add activities per term • Print summary of activities • Print lists of age group per sport house
	2.3.2 Assign Learners to bus routes (Menu 3.9)	• Learners assigned to a bus route • Bus tickets printed
	2.3.3 Maintain RCL (Menu 3.1.1)	• RCL member: add and edit
	2.3.4 Archived marks (Menu 3.1.1)	• Select and print marks from previous years.
	2.3.5 Reported Incidents (Menu 3.1.1)	• Incidents e.g. pregnancy, racial and domestic are recorded, edited & printed
	2.3.6 Learning barriers (Menu 3.1.1)	• Learning barriers recorded, edited & summary lists printed
	2.3.7 Assign mentors (Menu 3.1.9)	• Add Mentor to a learner + print list
2.4. Demerits and merit	2.4.1 Maintain Merit / demerit incidents (Menu 3.7.1)	• Demerit/merit settings
	2.4.2 Manage detention and other actions (Menu 3.7.3)	• Manage learners demerit/merit
	2.4.3 Statistical reporting (Menu 3.7.5 & 6)	• Print learner demerit/merit score lists • Print demerit/merit report
2.5. Learner attendance	2.5.1 Maintain learner attendance (Menu 3.3.1, 3.3.3 & 3.3.7)	•Print blank attendance register •Maintain weekly learner attendance •Maintain learner attendance per period
	2.5.2 Learner attendance reports (Menu 3.3.4 – 3.3.12)	• Learner absence notification • Attendance details report per learner • Weekly/Monthly/ Quarterly attendance summaries
	2.5.2 Learner attendance reports (Menu 3.3.13 – 3.3.15)	• Total of days absent per learner • Weekly / Monthly Learner Attendance Summary per Class • Quarterly Attendance
2.6 Reports & Stats	2.6.1 - Statistical Data and Reports Menu	• Enrolment printouts • Learner age + house group lists • Learners + extra mural activities • Details of SNE learners • Learner details data printouts • Learner aggregated data printouts • Extra mural activities report

3.2 "How to..." flow diagrams:

Capture Learner details & verify data regularly:

3.1.2 → 3.1.1 (4.1)	6.3 → 3.1.1 (4.1)	3.5.1, 3.5.5 & 6
• Print blank registration form • Capture data from completed form	• Print populated form annually for verification • Edit/ update details of all learnersl • Archive learner	• Enrollment report • Learner detail report • Attrition report etc
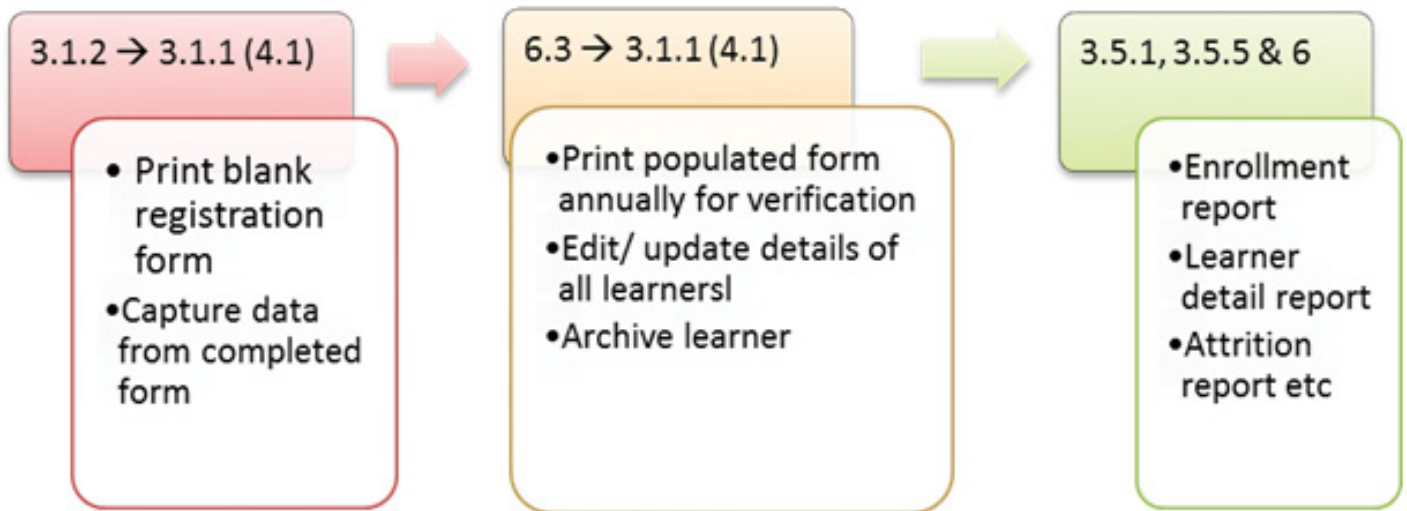
- *Maintain and report on ATTENDANCE:*

3.3.1, 3.3.3 , 3.3.7	Reports per learner 3.3.4 - 3.3.12	Aggregated Reports 3.3.13 - 3.3.16
• Print blank attendance register • Maintain weekly learner attendance • Capture absenteeism • Add reason and any supporting documents • Maintain learner attendance per period	• Learner absence notification • Attendance details report per learner • Weekly/Monthly/ Quarterly attendance summaries	• Learner absence notification • Attendance details report per learner • Weekly/Monthly/ Quarterly attendance summaries

- *Maintain Merits & Demerits A:*

Menu 1.11
- Set merit codes
- Set demerit codes
- Set demerit actions

2.4.1
Menu 3.1.1 & 3.7.3
- Record merit incidents
- Record demerit incidents

2.4.2
Menu 3.7.1
- Set up points for detention

2.4.2
Menu 3.7.3
Manage detention

2.4.2
Menu 3.1.1 & 3.7.3
- Merit : demerit ratio for **detention decision**
- **Send notifications to parents**
- Update merit: demerit ratio

2.4.3
Menu 3.7.5 -6
Statistical reporting

- **Maintain Merits & Demerits B: Misconduct reports:**

3.1
- Capture misconduct against learner

5.7 & 5.8
- Print report of all learners
- Print summary report

5.16 & 5.17
- Maintain harassment incidents
- Print report on all incidents

- **Learner reports available:**

Report Description	Menu	Grade	Class	Accession no	Date of Birth	Gender	Age	Disability	Extra mural	Population group	Hostel
➢ Enrolment printouts	3.5.1	x	x	x	x	x	x				x
➢ Learner age + house group lists	3.5.2	x	x		x	x					
➢ Learners + extra mural activities	3.5.3	x	x						x		
➢ Extra mural activities report	3.5.7	x	x						x		
➢ Details of SNE learners	3.5.4	x	x	x		x	x	x			x
➢ Learner details data printouts	3.5.5	x	x	x	x	x	x	From list			

Learner aggregated data printouts Menu 3.5.6	Menu	Grade	Age	Population group	Gender	Language	Disability
Mainstream related	3.5.6.1	x		x	x		
	3.5.6.3	x	x		x		
	3.5.6.4	x				HL	
	3.5.6.6	x				LoLT	
SNE related	3.5.6.2	x		x	x		x
	3.5.6.5	x				HL	x
	3.5.6.7	x				LoLT	
SNE Learners in Mainstream	3.5.6.15	x			x		x
Grade 1 enrolments	3.5.6.10				x		
FET subjects Grade 10-12	3.5.6.14	x		x			
Transfers into the school	3.5.6.11	x					
Nr of learners registered for social grants	3.5.6.16	x			x		
No of learners with deceased parents	3.5.6.17	x			x		
ASS Mortality (previous year)	3.5.6.12	x			x		
Current mortality	3.5.6.13	x			x		
Mode of transport	3.5.6.18	x					

Notes

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Feedback/Contact Form

Your feedback is important to us. Please leave any comment that you want. If you are struggling with anything in this module, please send us an email and remember to also give us a number or email to contact you back with.

Contact Name:

School Name:

Email Address:

Cellphone Number:

Version of SA-SAMS:

Operating System Version:

District / Province:

Comment / Problem Details:

Send Email

Contact Person	Telephone	Email
Frans Ramphele		ramphele.l@dbe.gov.za
Carinne van der Westhuizen	012 357 3832	vanderwesthuizen@dbe.gov.za

SA SAMS

South African School and
Administration Management
System

basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA