EVERY CHILD IS A NATIONAL ASSET

SA SAMS
South African School and Administration Management System

MODULE 3 PART 2

ABC OF ...
LEARNER AND PARENT INFORMATION

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Contents

A. Introduction 4
1. Purpose of the Module 4

B. Components of the Module 5
2. Module 3: Learner and Parent Information (continued) 5
2.1 Learner Placement 6
2.1.1 Place Learners in Grades & Classes 7
2.1.2 Assign Learners per Group to Register Classes 9
2.1.2a Assign Educators to Register Classes 9
2.1.3 Design Blank Class Lists 10
2.1.4 Register class summarised 11
2.1.5 Assign Language of Instruction 13
2.1.6 Year-End Learner Promotions 13
2.2 Learners with subjects 19

C. SUMMARY 26
3 Quick reference of the sub-menus and their uses: 27
3.1 "How to..." flow diagrams: 27
3.2 Feedback/Contact Form 31

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 learner's and parent's information.

- It also contains the processing and administration of attendance, disciplinary and extra-mural functions. (Included in Part 1)
- **This module also assists with the administration of the promotion procedures and placing of learners in register classes. (Included in Part 2**)

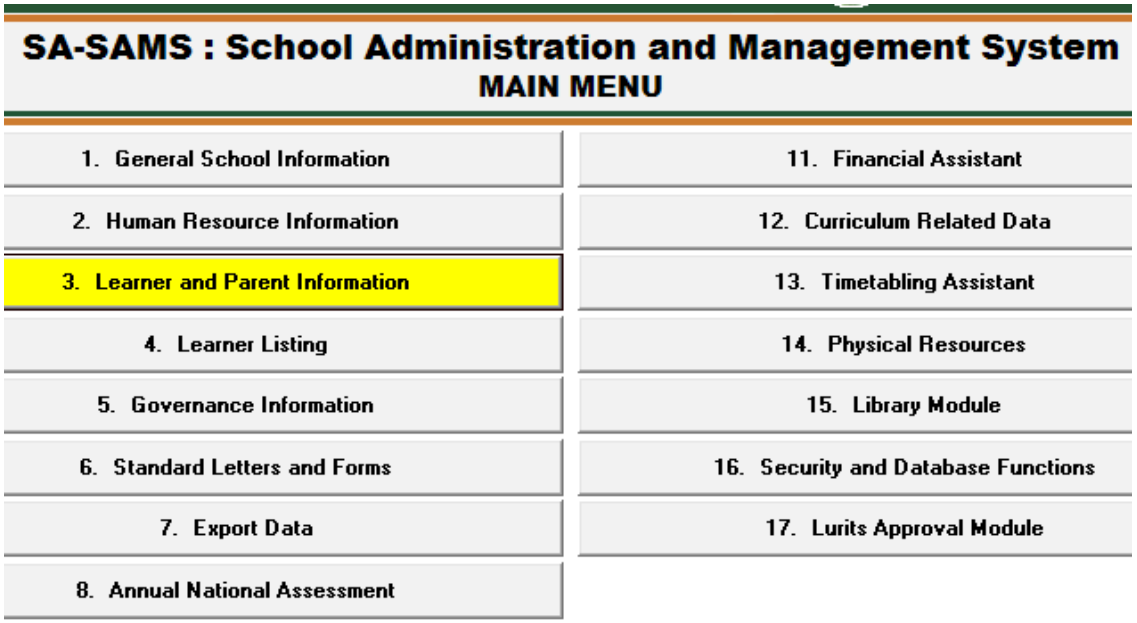


Figure 1: Main Menu

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 is **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 (continued)

The administration and management functions regarding information can be divided according to the specific purposes:

2.1 Placing learners in grades and classes
2.2 Assigning subjects to learners

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 placement	2.1.1 Learners in Grades & Classes (Menu 3.1.1 & 3.1.4 to7)	• Assign learners to grades • Assign learners to classes • Design blank class list • Class lists and statistics
	2.1.2 Learner Promotions (Menu 3.19)	• Year-End Promotion procedure
2.2 Learners with subjects	2.2.1 Assign Subjects to Learners (Menu 12.1.14)	•Assign subjects to learners •Educator subject groups
	2.2.2 View / Print Learner Subject Allocation (Menu 12.1.18)	•Learners with allocated subjects •Learners with no subjects •Learner with 7 and more subjects
	2.2.3 NSC Exam registration (Menu 3.17)	•Export NSC Exam Registration (View NSC Examination Registration Details)
	2.2.4 Subject summary (Menu 3.15)	•Print subject list with subject and number of learners per grade
	2.2.5 Reporting Language (Menu 3.13)	•Choose language for learner report

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 Figures 2 & 3.

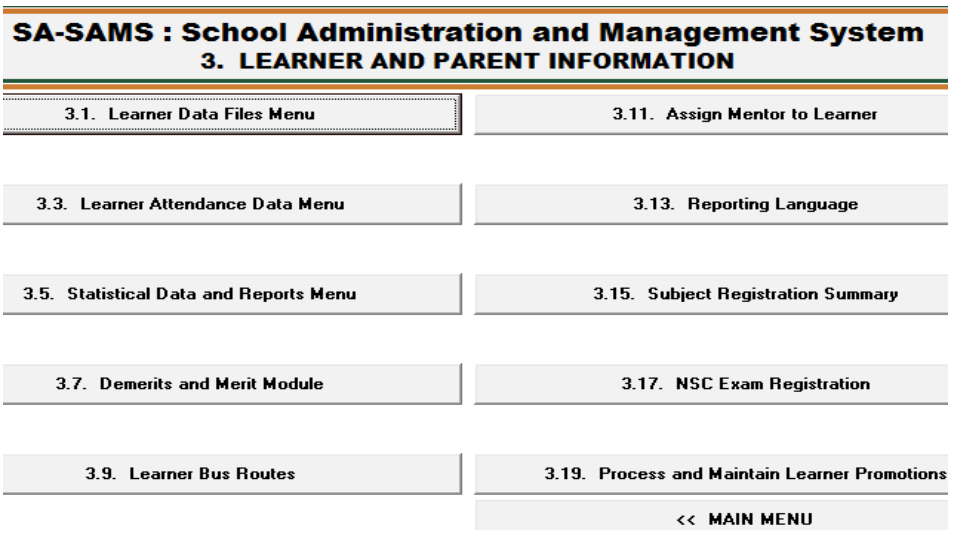


Figure 2: Components of Learner and Parent Information

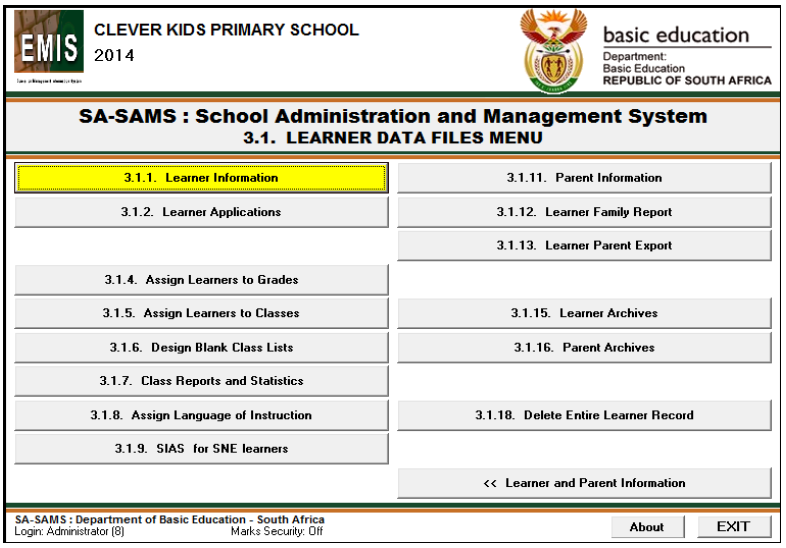


Figure 3: Components of Learner Data files

2.1 Learner Placement

All learners (SNE and others) need to be placed in a grade as specified by the National Assessment Policy.

- Learners of different grades can be grouped in the same class e.g. multi-grade classes and LSEN / Remedial classes.
- Learners in a grade can only be assigned subjects registered to that grade. (Subjects of more than one grade CANNOT be assigned to a learner e.g. English HL Gr 2, Life Orientation Gr 3 and Math Gr 3.

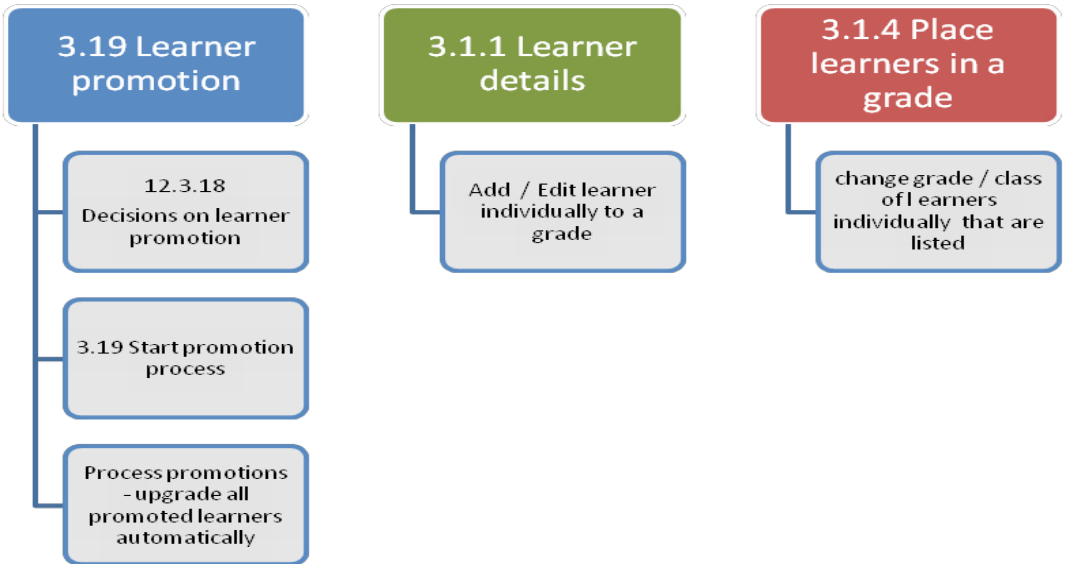
2.1.1 Place Learners in Grades & Classes

Learners are placed in a grade using the following menus and functions:

2.1.1a The promotion function places a promoted learner automatically in the next grade (Menu 3.19).

2.1.1b The grade and class are captured when adding a new learner or editing learner details (Menu 3.1.1).

2.1.1c Learner grades can be changed on a list (Menu 3.1.4).



2.1.1a Assign Learner to Grade: Promotion Process (Menu 3.19)

On Menu 12.3.18 learners are promoted (not promoted or progressed) based on the assessment results at the end of the year.

- On Menu 3.19 click on **Place Learners in New Grade** to start the process (Fig. 4).
- This process is not reversible but learners can be later changed manually on (Menu 2.1.4).

This process is discussed in section 3 of this guide.

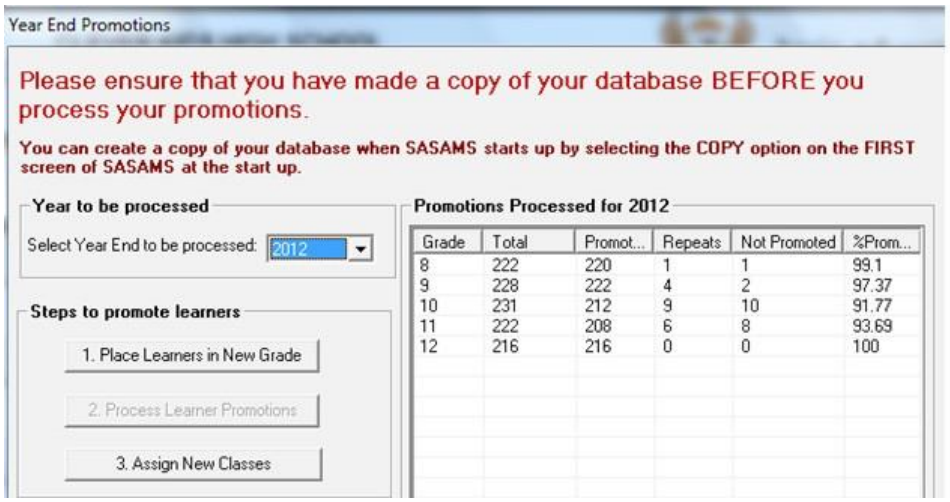


Figure 4: Place Learner in New Grade When Promoted

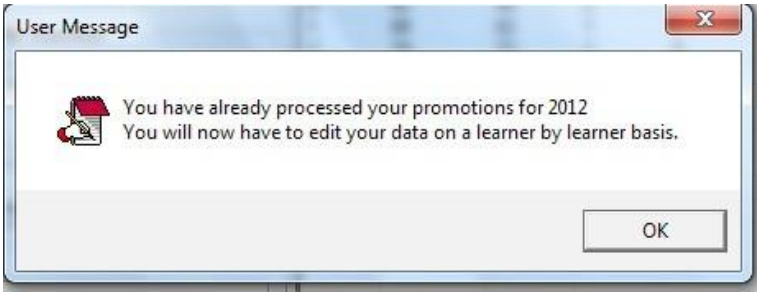


Figure 5: Informing That Promotion Procedure is Not Reversible

2.1.1b Assign Learner to Grade & Class Individually (Menu 3.1.1)

Learners can **individually** be reassigned to a grade or class in Learner Information (Menu 3.1.1)

- Click on **Edit Learner** and edit the grade and class in the fields as shown in Figure 6.

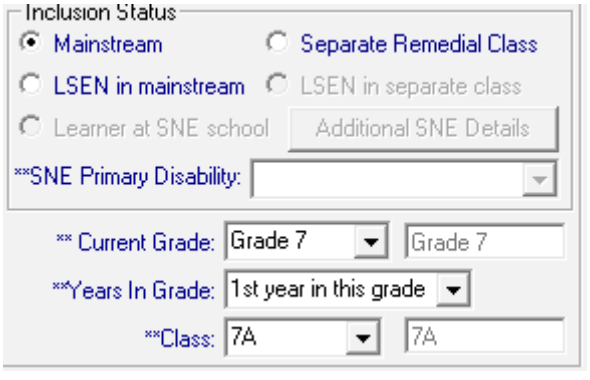


Figure 6: Learner's Grade and Class Details

2.1.1c Assign Learner to Grade & Class on a list (Menu 3.1.4)

Learners can **individually** be reassigned to a grade or class in **Maintain Learners in Correct Grades** & **Classes** (Menu 3.1.4).

Click on Menu 3.1.4 to open the list of learners assigned to a grade and class (Fig. 7).

- To find a learner select **Order by Birth Date** or **Order Alphabetically**.
- To change a grade: click on the arrow next to the **grade** and select the **required grade** from the drop-down list.
- To change the class: click on the arrow next to the **class** and select the **required class** from the drop-down list.
- Click on **Save** to save all the grades and class changes.

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

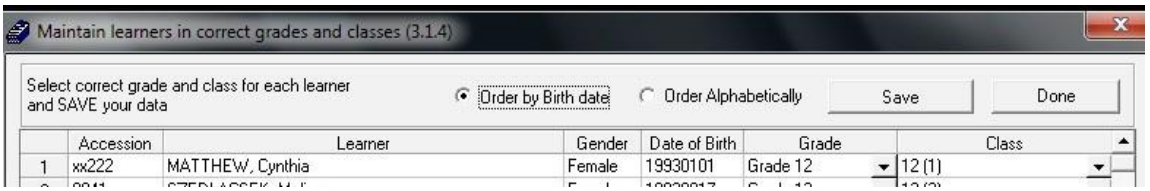


Figure 7: Maintain Learner in Correct Grade and Class

2.1.2 Assign Learners per Group to Register Classes (Menu 3.1.5)

Learners can **be assigned as a group to a register class** in **Assign Learners to classes** (3.1.5) as follows

Select a **grade** to populate a list of all the available classes and learners**.** (Fig. 8)

- Learner names **printed in blue** indicate that the learner has already been assigned to a class.
- The **number of learners in the class** is displayed in the bottom right. This is to assist with equal distribution of the learners to the classes.
- Click on the **Class Name** and then click on every learner that needs to be assigned to the class.
    - The assigned learners' names move to the box on the right.
- To **remove** a learner from the class
    - Click on the **learner's name** in the box on the right and then click on the **(<<) arrow.**
    - The learner's name moves to the box on the left.
    - Click on << All to **remove all learners** from the class.
- Click on **Save** to save all the class changes.

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

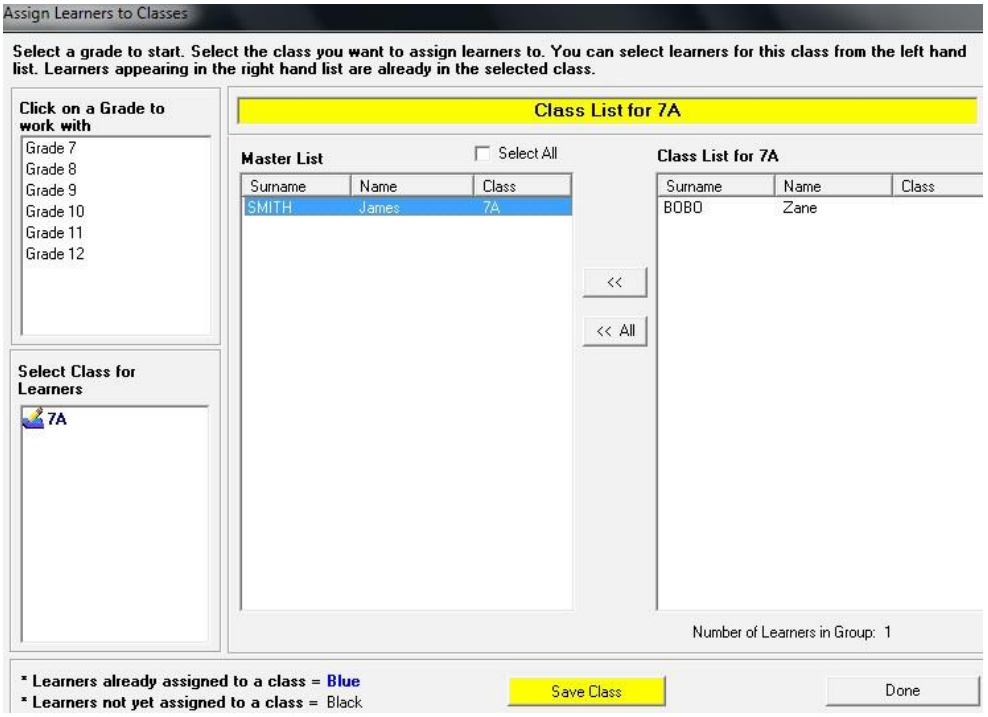


Figure 8: Assign Learners to Register Classes

2.1.2a Assign Educators to Register Classes (Menu 2.1.1)

On Menu 2.1.1 click on **Assign Register Class** to assign educators to a register class.

- Click on the **class** and then click on the **educator** (Fig. 9).
  - Both appear at the bottom of the screen.
  - Type the classroom number and then click on the **Accept** button.
- To remove a class from an educator, click on the class name in the right-hand column.
- Then click on the **Reassign Class and Educator.**

When finished click on **Save** and then the **Done** to exit the screen.

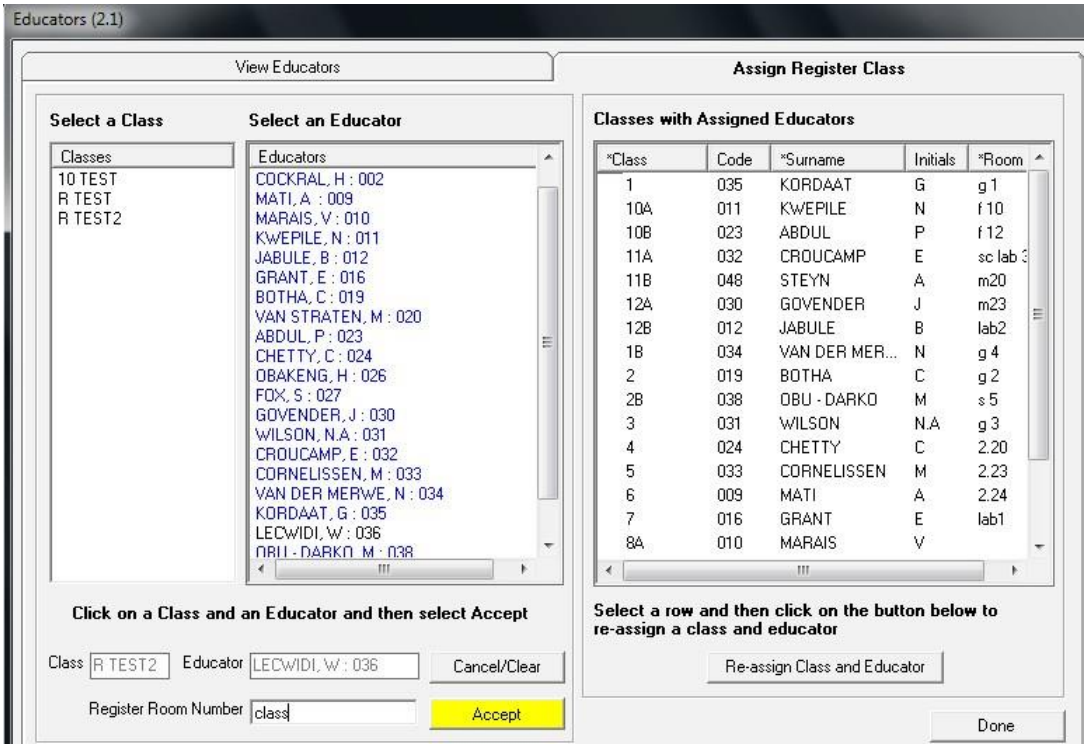


Figure 9: Assign Educators to Register Classes

2.1.3 Design Blank Class Lists (Menu 3.1.6)

Learner details can be verified from printed class lists. Register Class lists are also available in Menu 12.1.17.

Class lists can be customised with different headers on Menu 3.1.6 as follows:

- Select a grade to populate the class list (Fig. 10).
  - Select column headers from the drop-down list at the bottom of the page. (See table for selection)

Optional headers available for additional columns		
Date of Birth	Home Language	House
Date Registered	Citizenship	Boarder
ID Number	E-mail	Boarder Number
Nick Name	Cell number	Hostel
Other names		

  - A total of 13 columns are available for extra headers.
  - Click on **Save** to save all the class changes.

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

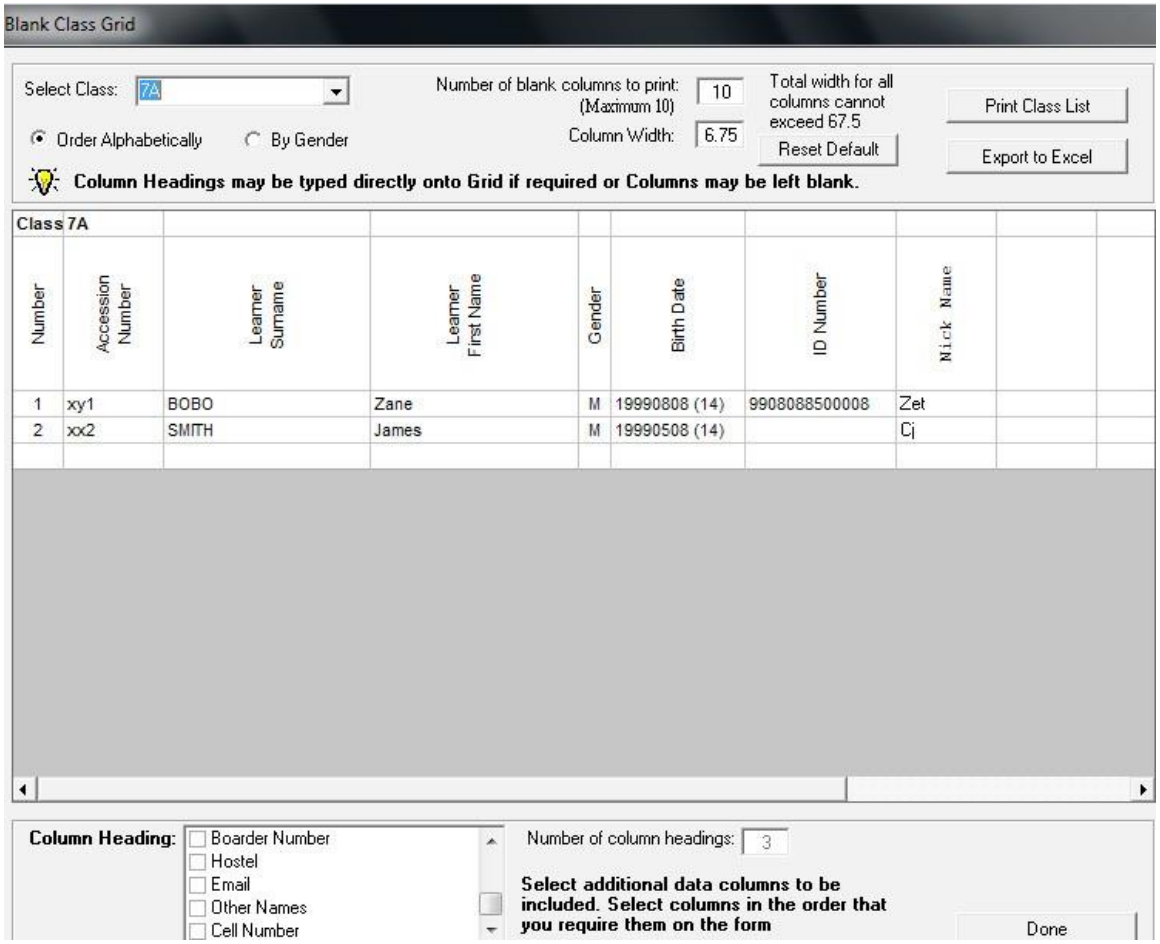


Figure 10: Blank Class List

2.1.4 Register Class Summarised (Menu 3.1.7)

Menu 3.1.7 summarises class details and can be used for reporting to the district and also for monitoring purposes.

Click on Menu 3.1.7 to display a summary list of all the classes with the number of learners (separated by gender), the educator and the room of the register class (Fig. 11).

- The number of learners placed in classes (and number of learners not yet placed in classes) is displayed at the top of the table.
- Click on **a class** and click on **Class Details** (at the bottom of the page) to print a list of learners with contact details (Fig. 12).
- Click on **a class** and click on **Photo Album** (at the bottom of the page) to print a blank class list of all learners assigned to the class (Fig. 13).
- Click on **a class** and click on **Blank Class List** (at the bottom of the page) to print a collage with all learners in the class with a photo and their details (Fig. 14).
- Click on **Print Statistics** to print a hard copy of the summary format.

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

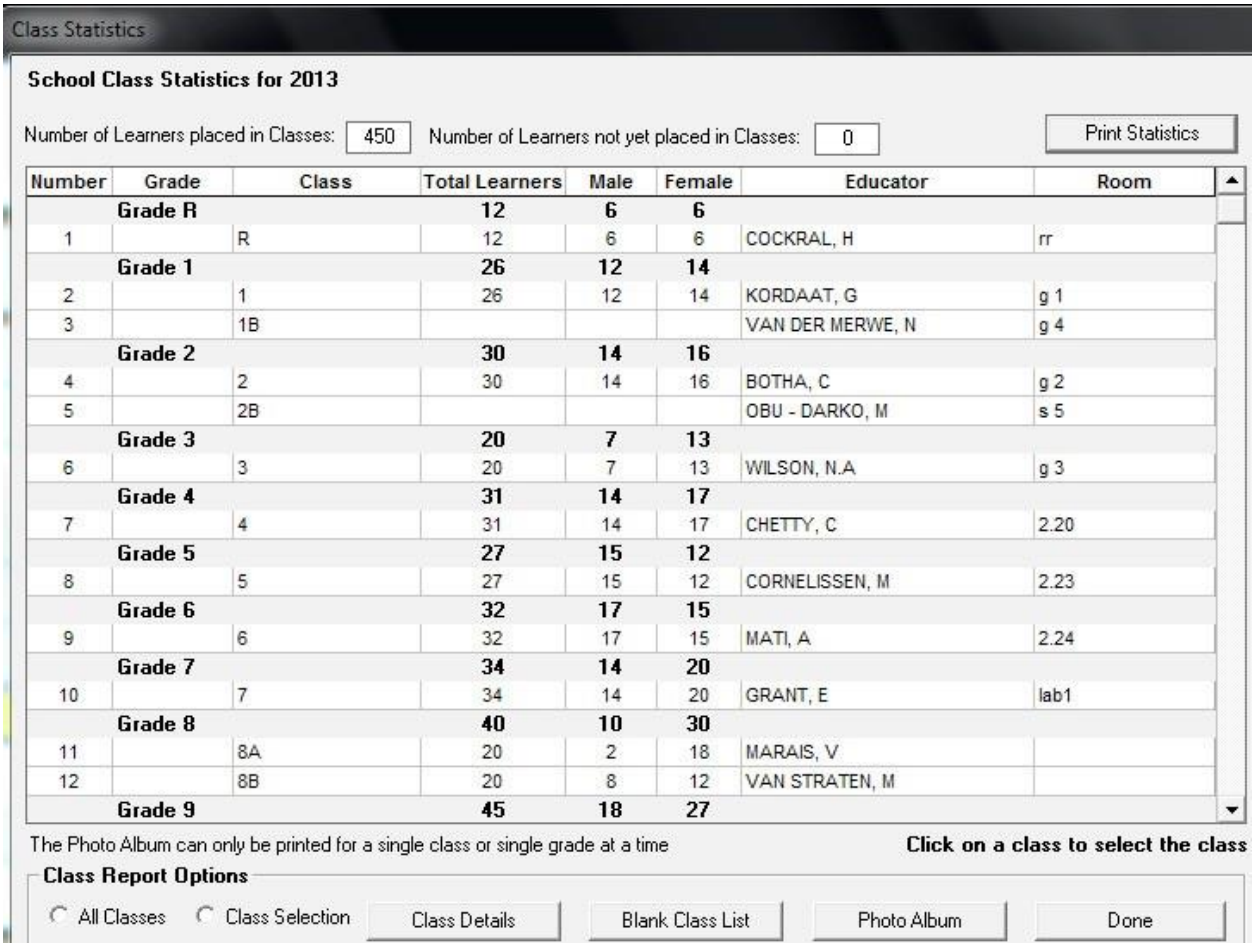


Figure 11: Class Statistics

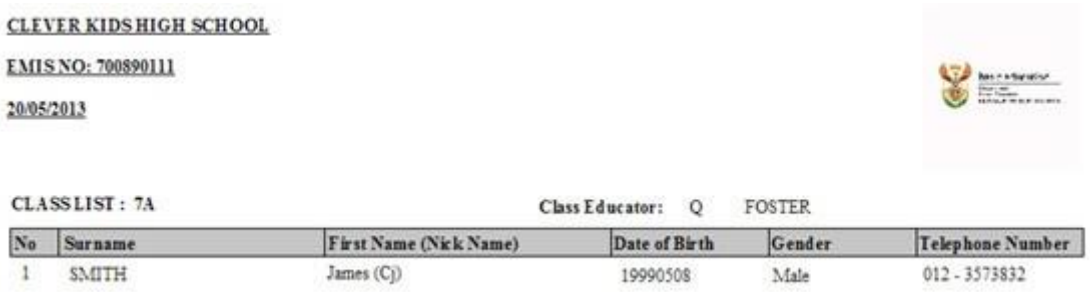


Figure 12: Class List with Learner Details

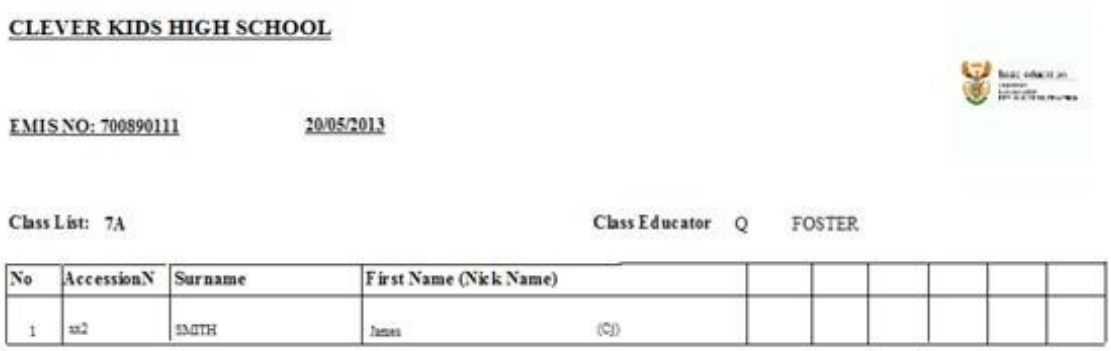


Figure 13: Blank Class list

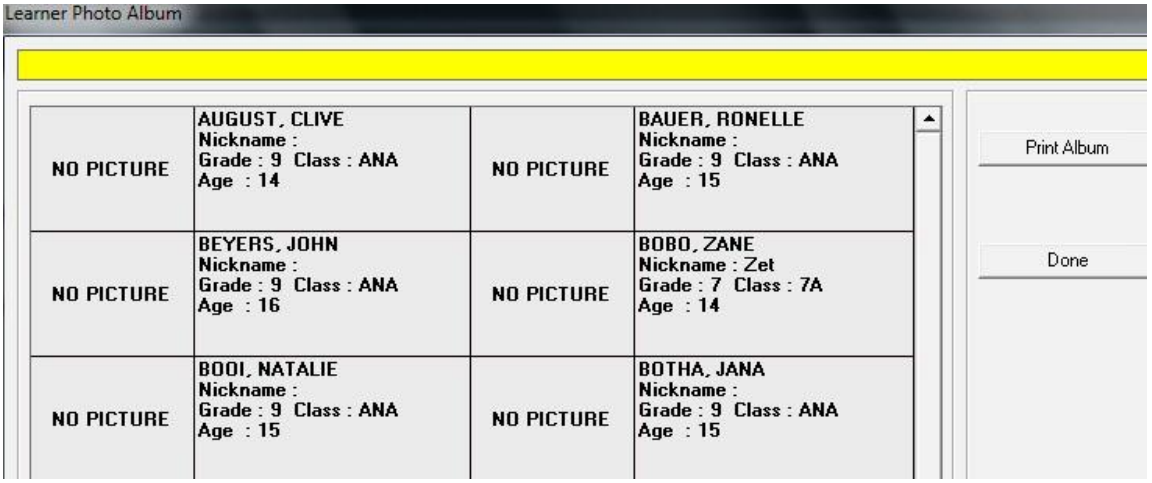


Figure 14: Photo Album

2.1.5 Assign Language of Instruction

This section assists the school to assign learners with a language of instruction (teaching language).

Click on Menu 3.1.8 select a grade and class then click on **Go** (Fig. 15).

- Select the learner you want to assign language of instruction to, then chose a language.

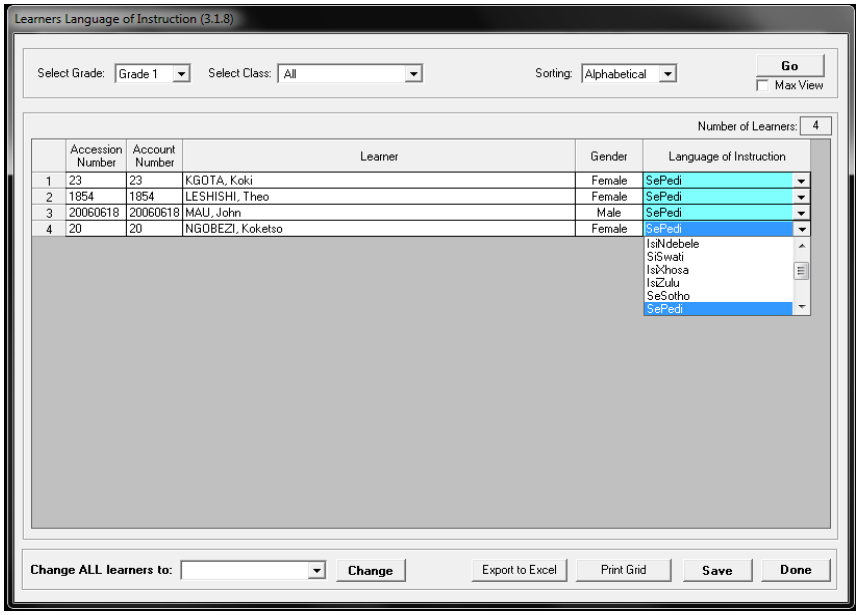


Figure 15: Assign Leaner Language of Instruction

2.1.6 Year-End Learner Promotions

This section assists the school with the administration of placing learners in the correct grade for the following year. It also assists in reporting on the number and % of repeaters and learners not promoted.

On Menu 3.19 select a year to populate the aggregate numbers per grade (Fig. 16).

- This process can only be performed once per year and is NOT reversible (Fig. 17).
- Click on **Place Learners in New Grade**
  - To open a screen with grades and learners (Fig. 18) in order to select the learners not promoted with reason.
- Click on **Process Learner Promotions** to move learners to the new grade (Fig. 19).
- Click on **Place Learners in New Class** (Fig. 23)
- Click on **Annual Promotion Printout** to view and print the summary statistics (Fig. 25).
- Click on **Learners repeating /dropout** to view and print the list of learners (Fig. 26).

- Click on **Comparative Statistics** per gender to view / print the summary statistics (Fig. 27).

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

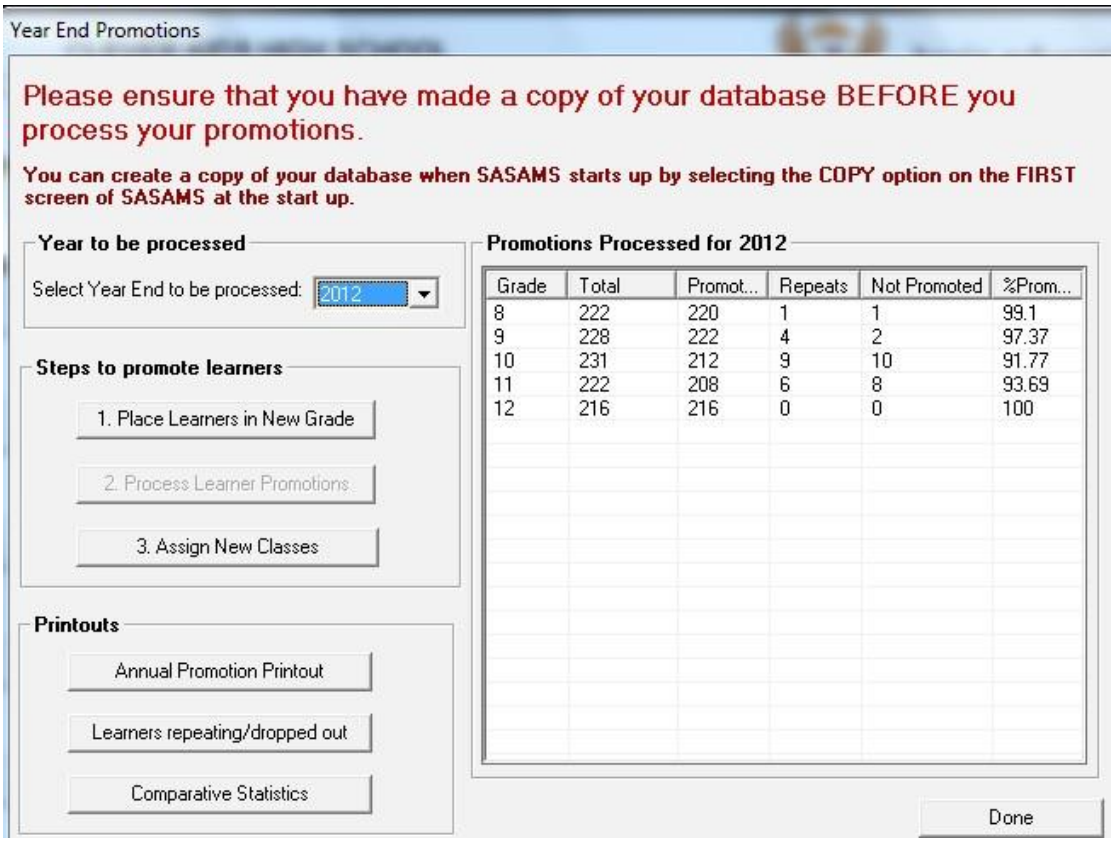


Figure 16: Year-End Promotion Menu

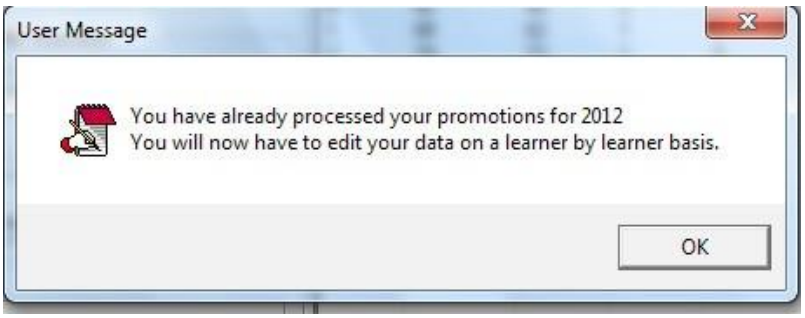


Figure 17: Warning Message on Promotion

2.1.5a Place Learners in the New Grade

Learners can be transferred to a next grade as follows:

Select a grade to populate the class list (Fig. 18).

- Tick the box next to the learner if the learner was NOT promoted.
- Select a reason for not promoting the learner (Fig. 19)
- The name of the selected learner/s will appear in red with the status indicated alongside the name/s.
- Click on **Save for processing** to save all the changes.

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

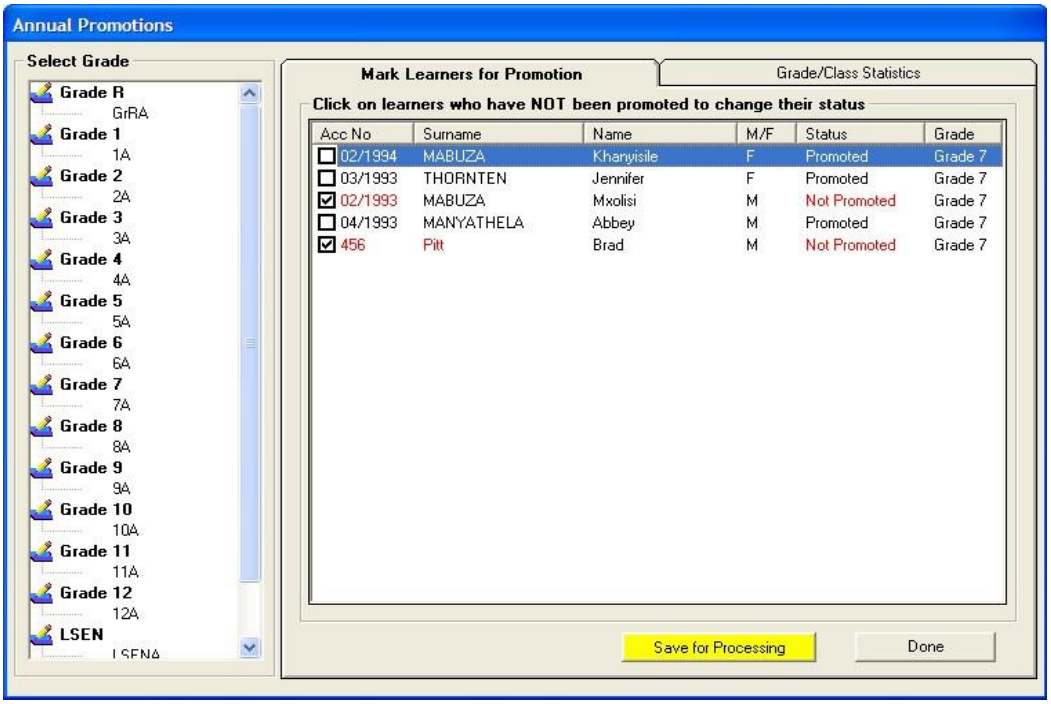
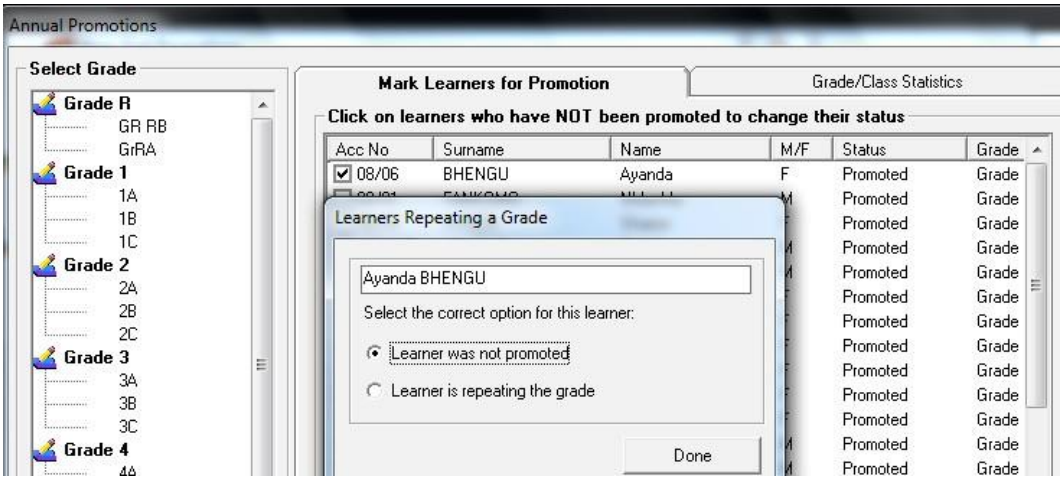


Figure 18: Maintain Promotion Decision per Learner



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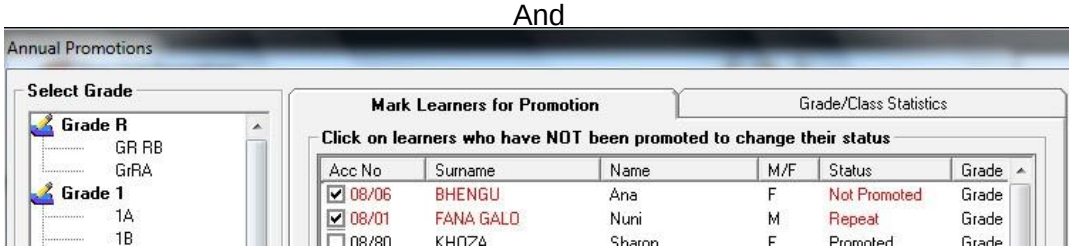


Figure 19: Select a Reason for Not Being Promoted

2.1.5b Process Learner Promotions

Click on **Process Learner Promotions** to display a summary of promoted and not promoted learners (Fig. 20).

- Tick the box at the bottom of the page to confirm the promotion decisions.
- Select the **promotion date** and click on **Process Promotions** to process the decision.
  - Click on **YES** to confirm the decision (Fig. 21).
- A message will appear to indicate a Back-up copy made before promotion is finalised (Fig. 22).
- The year-end promotion screen will indicate the promotions processed for that year.

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

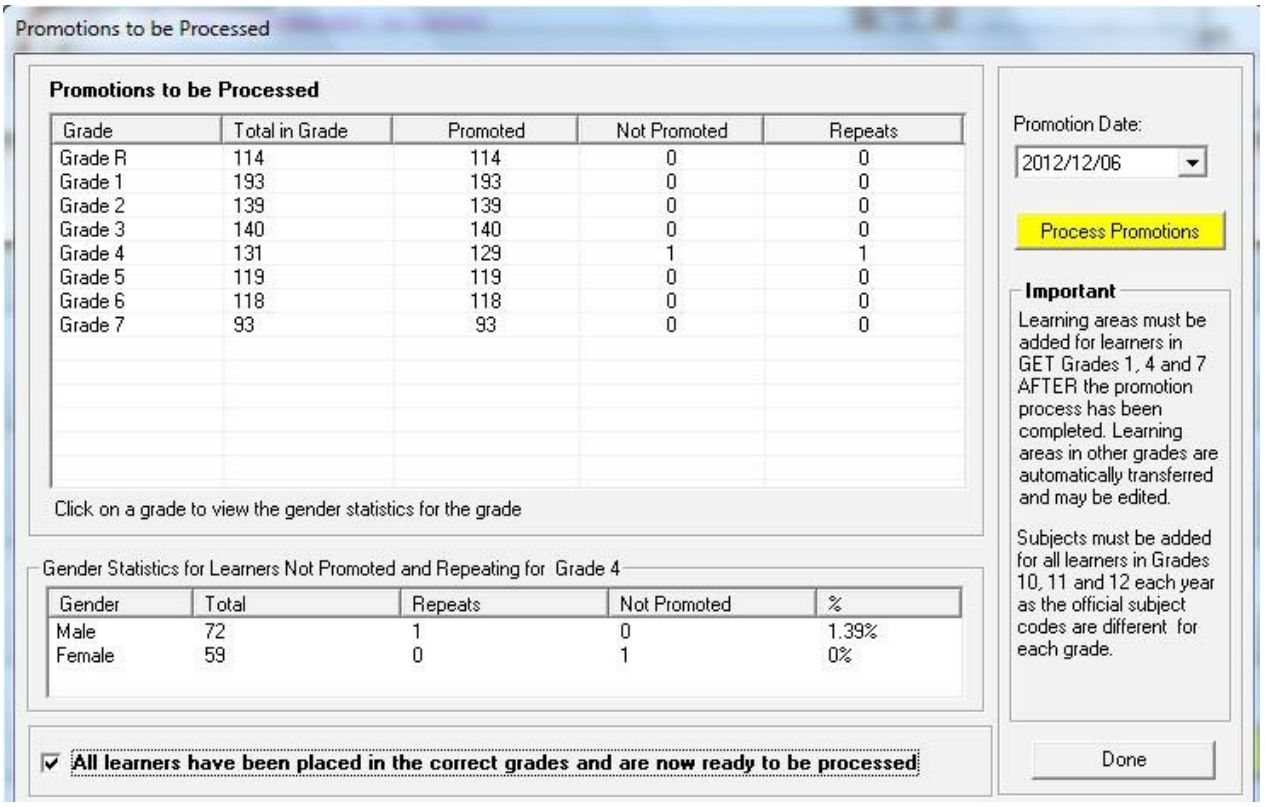


Figure 20: Promotions to be processed

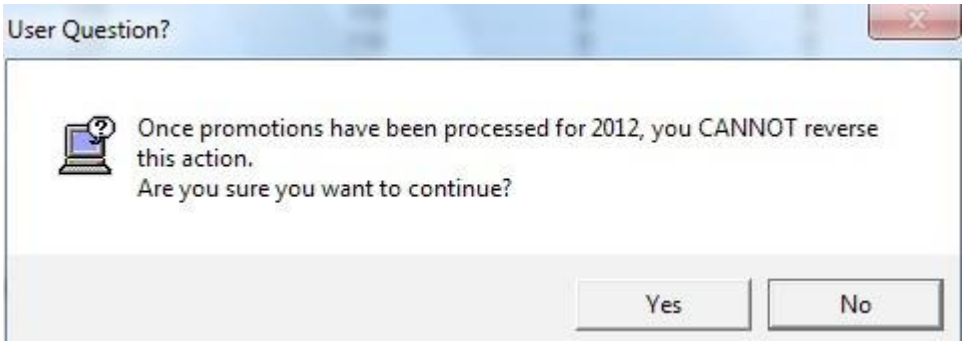


Figure 21: Promotions process to be confirmed

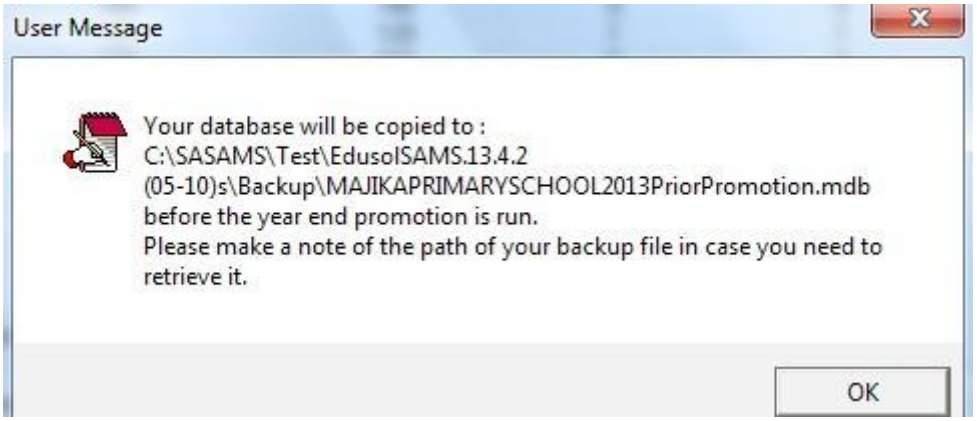


Figure 22: Back-up Copy Prior to Promotion

2.1.5c Assign New Register Classes to all Learners

Learners can **be assigned as a group to a register class** in **Assign Learners to Classes** (Menu 3.1.5) as shown in Figure 22. Refer to section **2.1.2** in this manual.

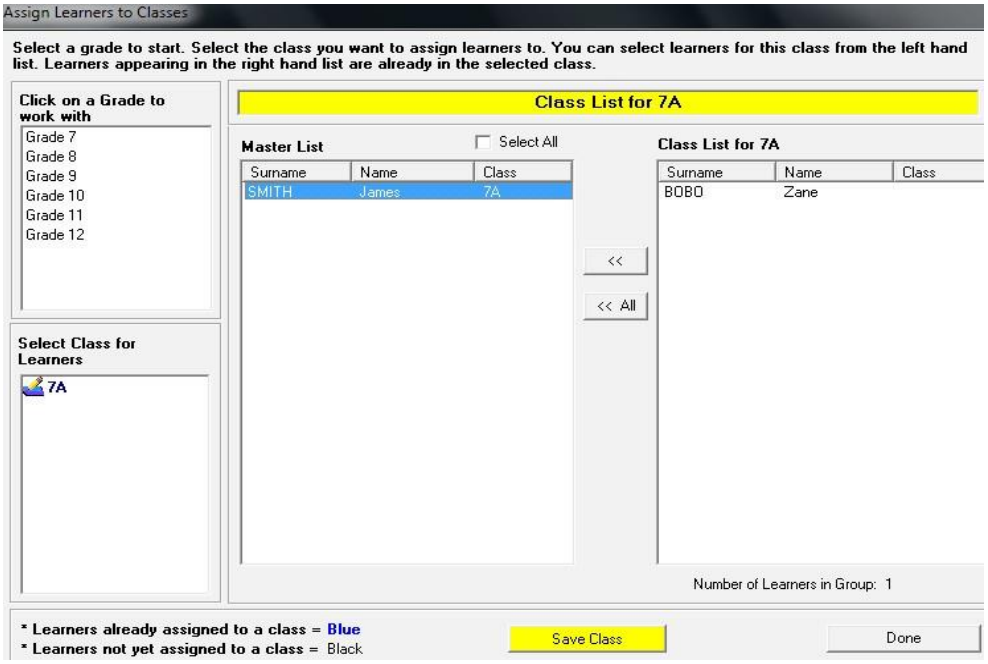


Figure 23: Assign Learners to Register Classes

2.1.5d Annual Promotion Statistics

Once the promotions have been completed statistics can be reviewed as follows (Fig. 24).

- Select a year and the type of graph to be used as shown in Figure 25.

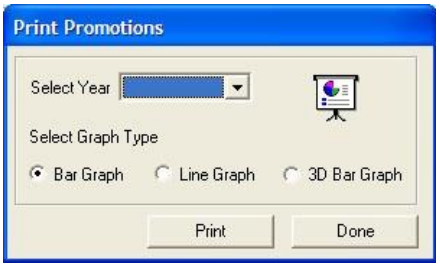


Figure 24: Options for Annual Promotions

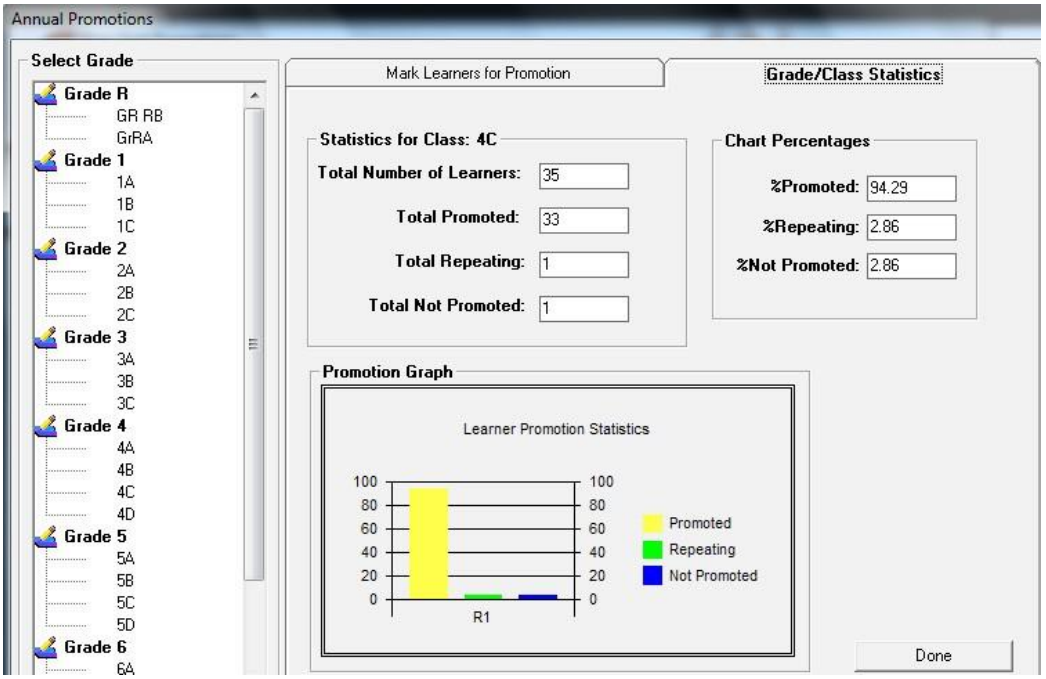


Figure 25: Annual Promotions Summary Statistics

2.1.5e Learners Repeating the Grade

Once the promotions have been completed learners who are repeating the grade can be viewed as follows:

- Select the options for the list as shown in Figure 26.
  - Click on Print Grid to print a hard copy.

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

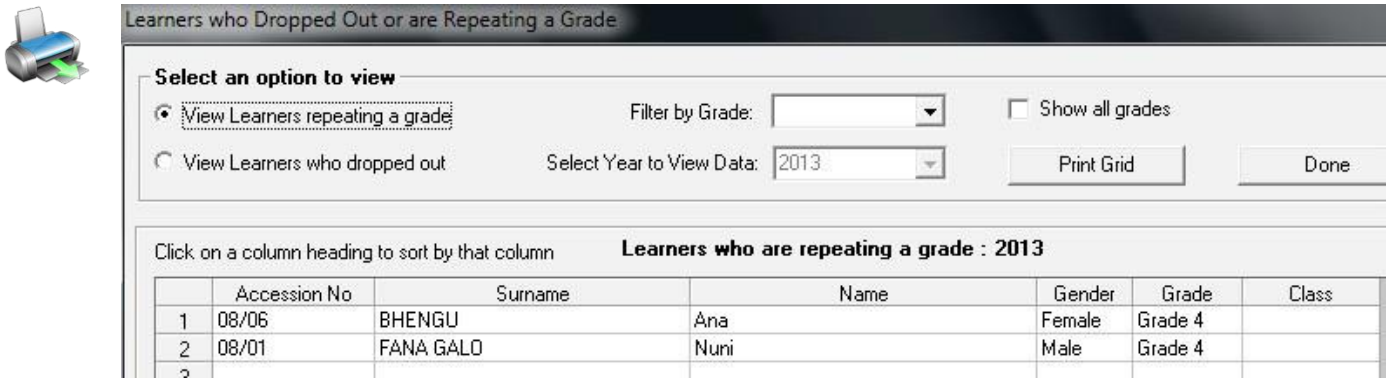
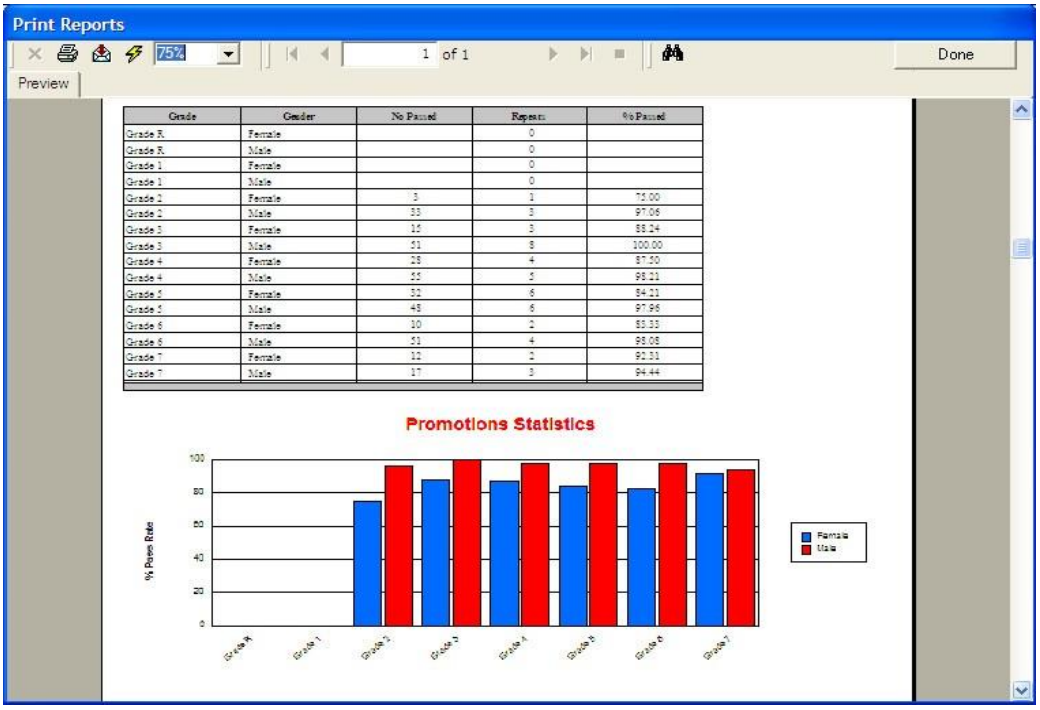


Figure 26: Learner List of Learners Repeating the Grade

2.1.5f Annual Promotion Statistics: per gender

You can click on **Comparative Statistics** to view the statistics per gender as shown in Figure 27.



Grade	Gender	No Passed	Repeats	% Passed
Grade R	Female		0	
Grade R	Male		0	
Grade 1	Female		0	
Grade 1	Male		0	
Grade 2	Female	3	1	75.00
Grade 2	Male	33	3	97.06
Grade 3	Female	15	3	88.24
Grade 3	Male	51	8	100.00
Grade 4	Female	28	4	87.50
Grade 4	Male	55	5	98.21
Grade 5	Female	32	6	84.21
Grade 5	Male	48	6	97.96
Grade 6	Female	10	2	83.33
Grade 6	Male	51	4	98.08
Grade 7	Female	12	2	92.31
Grade 7	Male	17	3	94.44

Figure 27: Annual Promotions Summary Statistics per Gender

2.2 Learners with subjects

2.2.1 Assign Subjects to a Learner (Menu 12.1.15)

Subjects can be updated to learners using three methods:

2.2.1a Adding a subject set to the whole class.

2.2.1b Adding a subject set to an individual learner.

2.2.1c Adding individual subjects to individual learners.

2.2.1a SUBJECT SETS added to the whole class:

Click on **Assign Subjects to Individual Learners** to open the capturing screen (Fig. 28).

- Click on the specific **Grade**.
- Click on the **Specific Class** and a list of learner of names appears.
- Click on one of the learners to verify the subjects currently assigned.
  - This is a good practice before updating the subjects to ensure that there are no previous grades, old or wrong subjects assigned to the learners.
- Click on **Remove ALL subjects for all learners in this class** to clear the subject field before adding a new field.
  - This option deletes subjects and will clear all marks captured in the current year.

There are three tabs (pages) above the listed learners that will be used to update / assign subjects to learners. (Fig. 28).The tabs are:

- Class list
- Master Subject List (for the grade)
- Subject Sets (for the grade)

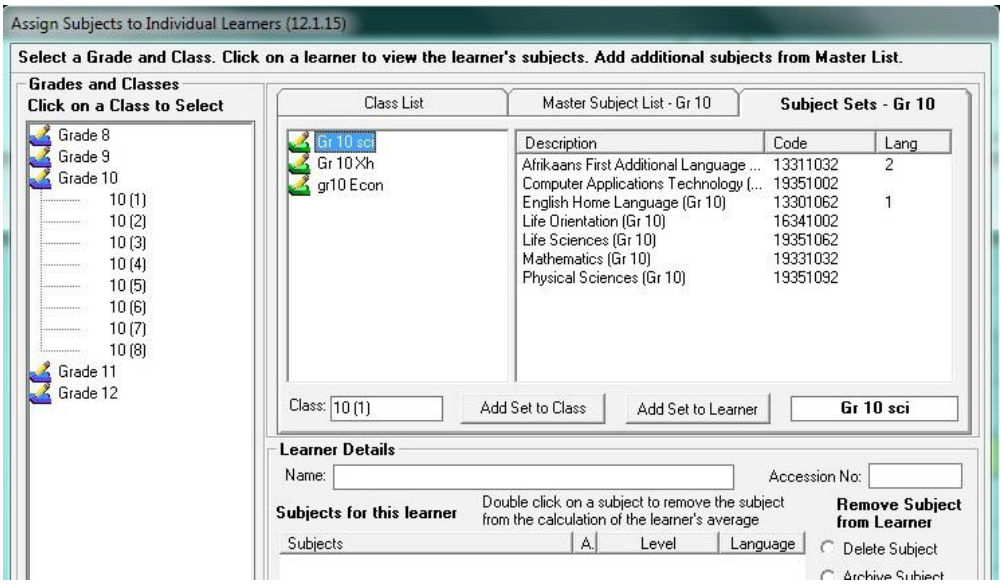


Figure 28: Assigning Subject Sets to Learners

- Click on **Subject Sets** (page/tab 3) as seen in Figure 28.
  - A list of subject sets created for the grade will populate in the centre of the screen
- Click on the name of the **selected set**.
  - The **class name** and options "**Add Set to Class" and** "**Add Set to Learner"** appears**.**
- Click on **Add Set to Class**. The subjects grouped in the set are added at once to all the learners in the class.
- Repeat for all the other classes and grades.

2.2.1b SUBJECT SETS added to an individual learner

- Click on the **learner's name** on the list.
- Click on **Subject Sets** (page/tab 3) as seen in Figure 28.
  - A list of subject sets created for the grade will populate in the centre of the screen
- Click on the name of the **selected set**.
  - The **class name** and options "**Add Set to Class" and** "**Add Set To Learner"** appears**.**
- Click on **Add Set to Learner**.
  - The subjects grouped in the set are added to the learner and appears at the bottom under **Learner details.**
- Repeat for other learners.

2.2.1c SINGLE SUBJECTS added

Click on **Assign Subjects to Individual Learners (12.1.15)** to open the screen (Fig. 29).

- Click on the specific **Grade.**
- Click on the **specific class** and a list of learner names appears.
- Click on the selected **learner** on the list.
  - The learner's subject details are shown at the bottom of the screen.
- Click on **Master Subject List** (page/tab 2) as seen in Figure 29.
  - A list of subject for the grade will populate in the centre of the screen.

- The class name and option “Add Subject to Learner” appears.

- Click on the **Subject**.
- Click on **Add Subject to Learner**
  - The subject is added to the learner and appears at the bottom under **Learner Details.**
- Click on **Y** to include the subject’s marks to the average of the learner or **N** if the marks of the subject should not form part of the learner’s average.
- Repeat for other learners.

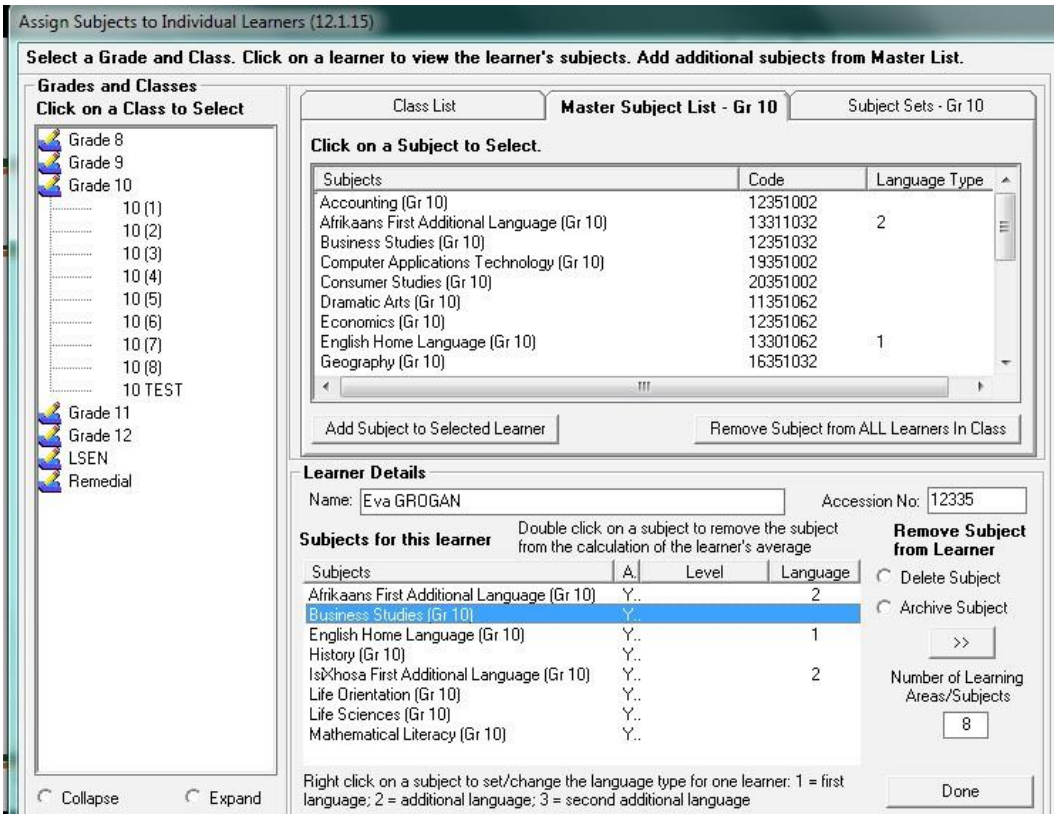


Figure 29: Assign Individual Subjects to Learners

2.2.2 View / Print Learner Subject Allocation (Menu 12.1.18)

This menu can be used by school management to validate the subjects assigned to the learners.

View/ print learner subject allocation menu (Fig. 30) allows you to print the following lists:

- All learners with their allocated subjects, also per grade and a specific class.
- All learners without any allocated subjects
- Lists can be printed for learners in GR 12 with more than 7 subjects, with 7 subjects and a list with learners less than 7 subjects.

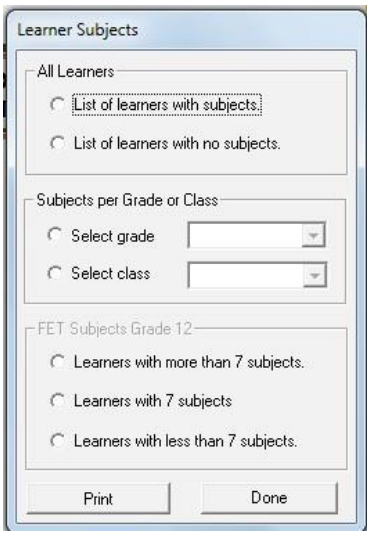


Figure 30: Learner Subjects

- Select a relevant option and then click the **Print** button too print a preview list.

2.2.3 NSC Exam Registration (Menu 3.17)

A selected group of learners can be exported and uploaded to be registered for the National Senior Certificate Examination.

Click on Menu 3.1.1

- Select the l**earner** and click on **Edit Learner**, select the last page **NSC Exam Registration**.
- Edit the details of the learner and click on **Save** to save the changes (Fig. 31).

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

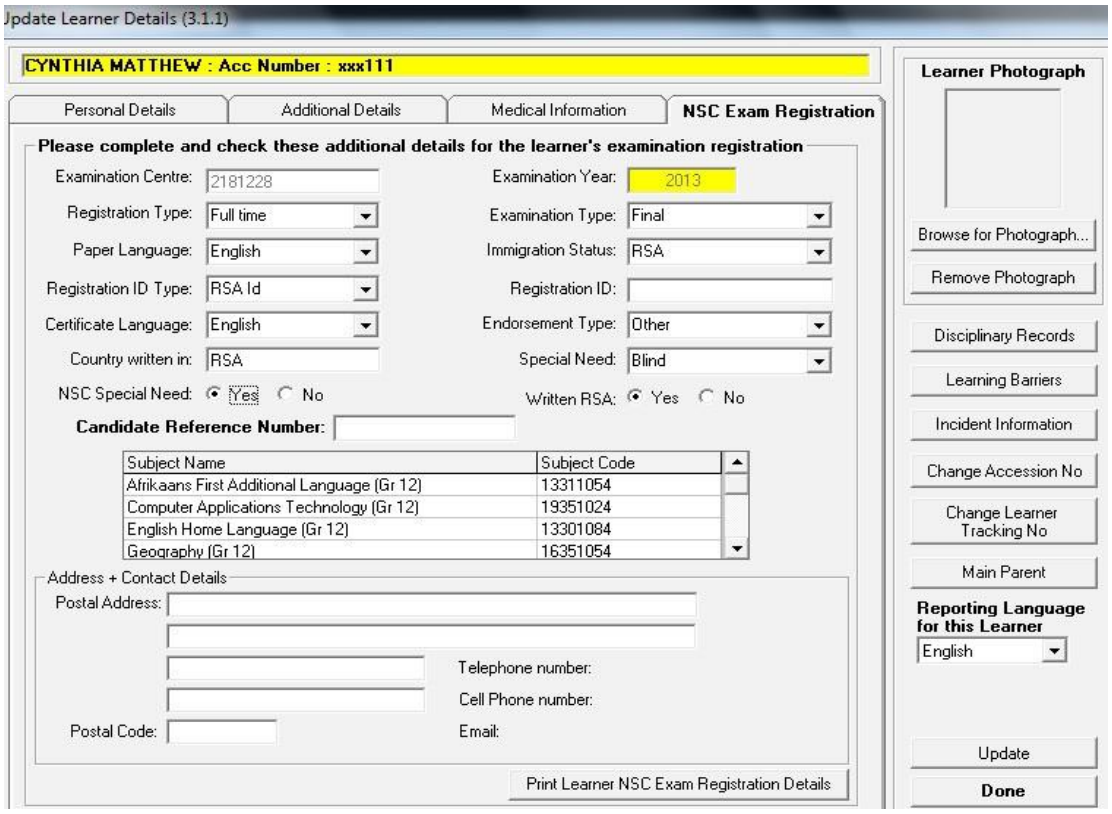


Figure 31: Update Learner Details (NSC Exam registration)

Click on Menu 3.17

- Read the instructions in order to export learner data successfully for examinations (Fig. 32) and click on **Continue.**

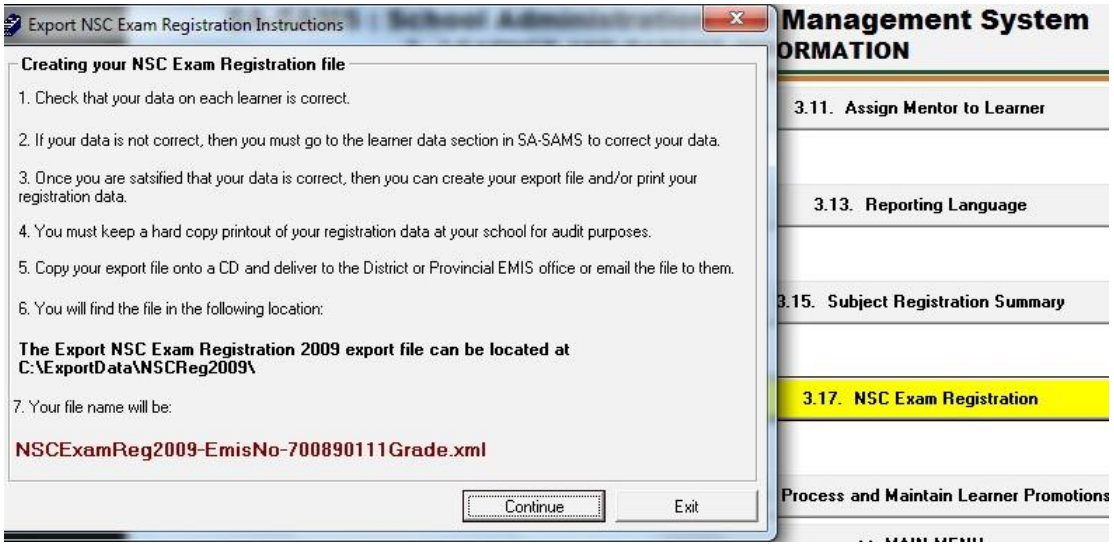


Figure 32: NSC Exam Registration

Select the **Grade** and click on **View Export data** (Fig. 33).

- Data in red needs to be verified.
- Tick the box at the bottom of the page that data is verified.
- Click on Create XML File to export the data.
- Click on Print Details to print hard copy form of the learner registration (Fig. 34).

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

Figure 33: NSC Exam Registration: View Export data

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NSC Examination Registration - Learner Details

xamination Centre: 71818181

Grade: Grade 10	**Class:** 10 -10

Stanley ZORO : Acc Number : 11071

Candidate Reference Number:		**Exam Year:**	2013
Birth Date:	19980419	**Exam Type:**	Final
Gender:	Male	**Registration Type:**	Full time
Race:	White	**Immigration Status:**	RSA
Home Language:	English	**Registration ID Type:**	RSA Id
Paper Language:	English	**Registration ID:**	
Certificate Language:	English	**Endorsement Type:**	Other
Special Need:	None	**Written RSA:**	Y
NSC Special Need:	N	**Country Written:**	RSA

Subject Details

SubjectName	Code
Afrikaans First Additional Language (Gr 10)	*13311032*
English Home Language (Gr 10)	*13301062*
Information Technology (Gr 10)	*19351032*
Life Orientation (Gr 10)	*16341002*
Mathematics (Gr 10)	*19331032*
Music (Gr 10)	*11351092*
Physical Sciences (Gr 10)	*19351092*

Address & Contact Details

Postal Address:		**Telephone Number:**	043 7354280
		Cell Phone Number:	0797345626

Figure 34: NSC Exam Registration: View learner registration form

2.2.4 Subject list with number of learners (Menu 3.15)

Once the learners have been assigned subjects the subject registration can be verified and viewed on the **Subject Registration Report** e.g. to verify the subjects for ANA.

The list contains the subject with the number of learners as well as LoLT.

Click on Menu 3.15 and then click on **OK** for a preview of the subject list (Fig. 35).

- Click on the **Printer Icon** to print a hard copy.

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

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Subject Registration Summary Per Grade and Language of Instruction / NSC Paper Language

Subject	Language	Gr 1	Gr 2	Gr 3	Gr 4	Gr 5	Gr 6	Gr 7	Gr 8	Gr 9	Gr 10	Gr 11	Gr 12	TOTAL
Afrikaans First Additional Language (Gr 8) (133	English								192					192
Afrikaans First Additional Language (Gr 9) (133	English									179				179
Afrikaans Home Language (Gr 9) (13304512)	English									1				1
Arts and Culture (Gr 8) (11351162)	English								225					225
Arts and Culture (Gr 9) (11351172)	English									229				229
Economic Management Sciences (Gr 8) (1235	English								225					225
Economic Management Sciences (Gr 9) (1235	English									229				229
English Home Language (Gr 8) (13304592)	English								225					225
English Home Language (Gr 9) (13304602)	English									229				229
IsiXhosa First Additional Language (Gr 8) (133	English								33					33
IsiXhosa First Additional Language (Gr 9) (133	English									50				50
Life Orientation (Gr 8) (16341282)	English								225					225
Life Orientation (Gr 9) (16341292)	English									229				229
Mathematics (Gr 8) (19331442)	English								225					225
Mathematics (Gr 9) (19331452)	English									229				229
Natural Sciences (Gr 8) (19351412)	English								225					225

Principal Signature: _____ Date: _____ SMDD Signature: _____ Date: _____

District Official Signature: _____ Date: _____

Figure 35: Subject Registration Summary

2.2.5 Maintain Learner Report Languages (12.1.13 or 3.13)

Maintain Learner Report Languages menu (Fig. 36) lists the learners and the reporting language as was captured 3.1.1 Learner information. The reporting language determines the language of all communication documents sent to the learner e.g. letters, learner report and financial statements.

The learner's reporting language can be changed individually or per group in this screen as follows (Fig. 36):

- Click on the **Maintain Learner Report Language** button to open the screen below.
- **Select the grade** from the pre-populated list.
- **Select a class** from the pre-populated list to populate the table.
- Select to list the learners **alphabetically** or by **gender**.
- To change the language of the group:
  - Tick in the box of the chosen language
  - A pop up screen will appear to confirm the change. Click on **Yes.**
- To change the language of an individual learner:
  - Place the curser on the symbol of the report language of the learner. Change the language by entering **E or A.**
- The reporting language grid can be printed by clicking on the Print Grid button.

To exit the screen, click on **Done.**

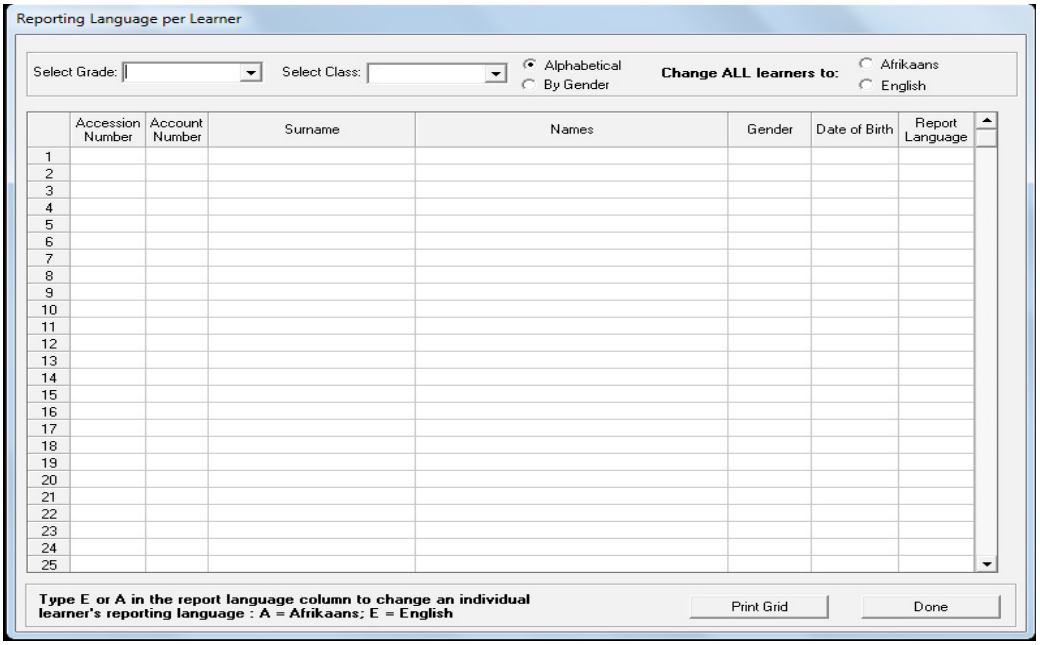


Figure 36: Reporting Language per Learner

3. SUMMARY

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

2.1 Placing learners in grades and classes
2.5 Assigning subjects to learners

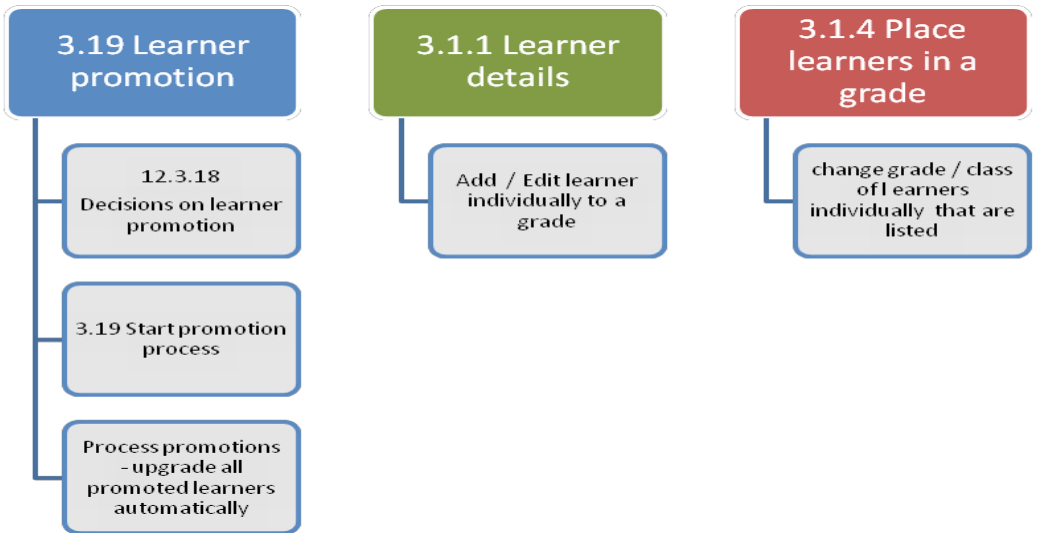
3.1 Quick reference of the sub-menus and their uses:

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

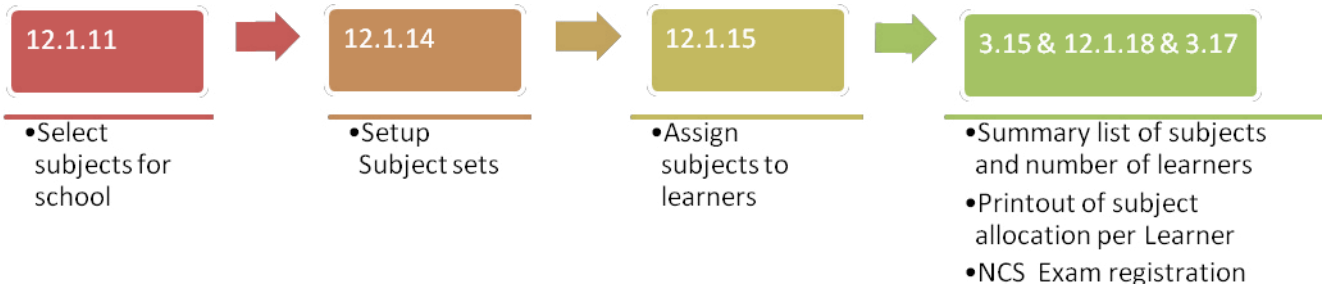
Header & (SA-SAMS menu number)		Functionality
2.1 Learner placement	2.1.1 Learners in grades & classes (Menu 3.1.1 & 3.1.4 to7)	• Assign learners to grades • Assign learners to classes • Design blank class list • Class lists and statistics
	2.1.2 Learner promotions (Menu 3.19)	• Year-End Promotion procedure
2.2 Learners with subjects	2.2.1 Assign subjects to learners (Menu 12.1.14)	• Assign subjects to learners • Educator subject groups
	2.2.2 View / Print Learner Subject Allocation (Menu 12.1.18)	• Learners with allocated subjects • Learners with no subjects • Learner with 7 and more subjects
	2.2.3 NSC Exam registration (Menu 3.17)	• Export NSC Exam Registration (View NSC Examination Registration Details)
	2.2.4 Subject summary (Menu 3.15)	• Print subject list with subject and number of learners per grade
	2.2.5 Reporting Language (Menu 3.13)	• Choose language for learner report

3.2 "How to..." flow diagrams:

- ***Place a Learner in Grade & Class:***



- ***Assign a subject to a learner & related reports***



- ***Reports on subjects and promotion***

Description of report	Figure
Class register summaries (Menu 3.1.7)	Fig 11
Subject list with number of learners (Menu 3.15) View / Print Learner Subject Allocation (Menu 12.1.18)	Fig 35 Fig 29
Learners repeating the grade Annual promotion statistics:	Fig 25 Fig 26 & 24

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:

Email Address:

Cellphone Number:

Version of SA-SAMS:

Operating System:

District / Province:

Comments / Problem Details:

Send Email

Contact Person	Telephone	Email
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EVERY CHILD IS A NATIONAL ASSET

SA SAMS
South African School and Administration Management System

basic education
Department:
Baslc Educatlon
REPUBLIC OF SOUTH AFRICA