



# HELPING FAMILIES INITIATIVE USER GUIDE

# Revision History

Current version	6/27/25
17th Revision	6/10/25
16th Revision	4/30/25
15th Revision	3/25/25
14th Revision	3/12/25
13th Revision	1/21/25
12th Revision	12/11/24
11th Revision	11/21/24
10th Revision	11/20/24
First version	4/16/24

# Welcome to the HFI User Guide

HFI allows our team to manage attendance and behavior incidences from local schools.

---

**For quick navigation of the guide, click on any of the headers within the table of contents!**

## **Contributing Authors**

Mitzi Howard, Abby Brumbeloe, Tim Enloe

# Table of Contents

## 06 Dashboard

08 Batch Letters To Print

---

## 11 Case Record

11 Student Info Tab

15 School Tab

15 Attendance/  
Violation Tab

19 NCFAS-G

27 Individualized  
Intervention Plan

28 Journal

29 Images

30 Reports

31 Individual Student  
Reports

---

## 32 Guardian

---

## 35 Administration

35 Users

35 Community Resources

37 Documents

37 InterAgency Team

39 School System

39 Circuit

39 Preferences

---

## 40 Reports

---

## 45 Referrals

---

## 46 IAT Meetings

---

## 51 Letters

---

## 52 Emailing

---

## 53 Texting

55 Create Texting Templates

56 Batch Texting

---

## 61 Merge Process

---



---

## 65 Web Portal

---

## 67 Tools and Tips

# Dashboard

When opening the HFI solution, a dashboard will display unexcused absences and violations/infractions for your district, including cases that are assigned to you as a case worker.

Each student's information is downloaded from ALSDE for each academic school year weekly so you have the most up to date information on students in your district.

When clicking on the arrows or one of the statuses shown in My Cases, you will be taken to a list of cases based on your choice. The system will build a list of students for each category.

When you click on the arrow in Snapshots, it will take you to a list of students and their absences or students involved in violations. New offenses will display based on the dates chosen.

Dashboards update daily at noon and overnight.

The screenshot displays the HFI Dashboard for Mobile County DA #13. The dashboard is titled 'Welcome, Developer' and shows data for the Academic Year 2025. The 'My Cases' summary shows 2 In Progress, 2 Active, and 10918 New Offenses. The 'Snapshots' section, last updated on 12/11/2024 at 12:25:41 AM (EST), shows the following data:

Category	Count
Unexcused Absences	6,184
Missing Reason Codes	133
3 UA & No Violations - Warning Eligible	1,829
4 UA - Assessment Eligible	1,336
7 UA - Petition Recommendation Eligible	317
Violations	1,683
1 Violation & No UA - Warning Eligible	139
2 Violations & No UA - Assessment Eligible	0
Active in Juvenile Court	0

The sidebar menu includes the following options: Dashboard, Case Record, Administration, Reports, Referrals, and IAT Meetings.

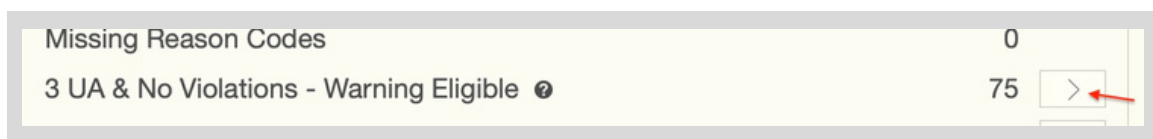


# Batch Letters To Print

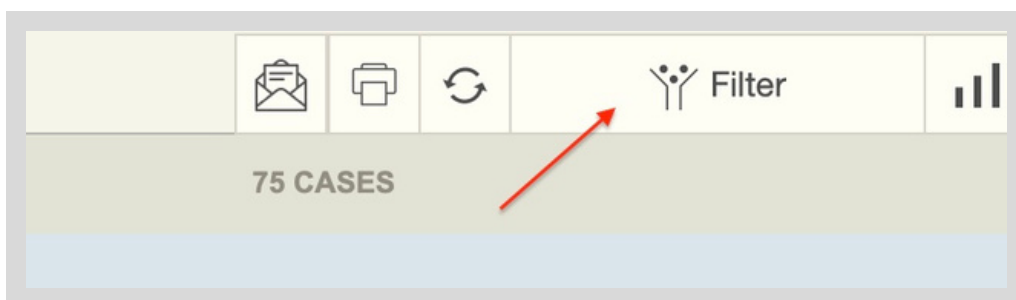
If you click on the 3 UA list from the Dashboard and then narrow down your search to your cases – using the "Caseworker" filter that should allow you to only print letters where you are assigned to them.

Here's the process to limit to your Students only:

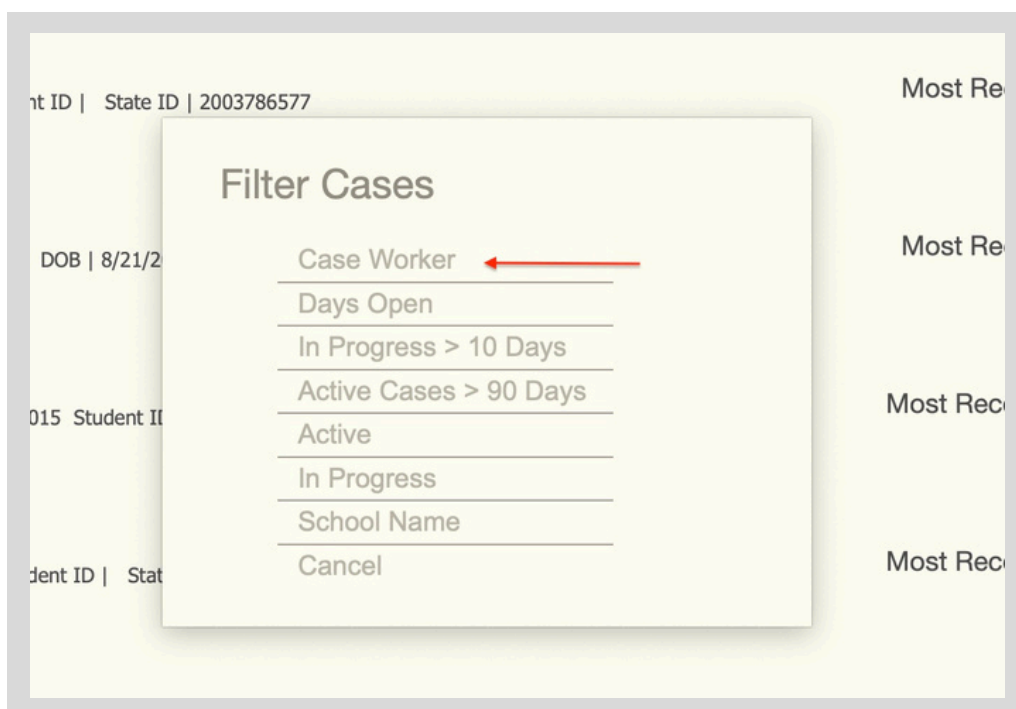
1. From your Dashboard choose the arrow icon by 3 UA.



2. Once the list of students displays, click on the "Filter."

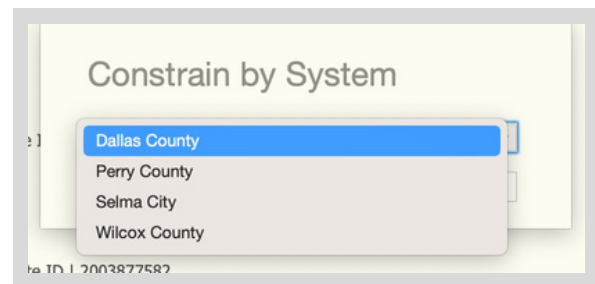
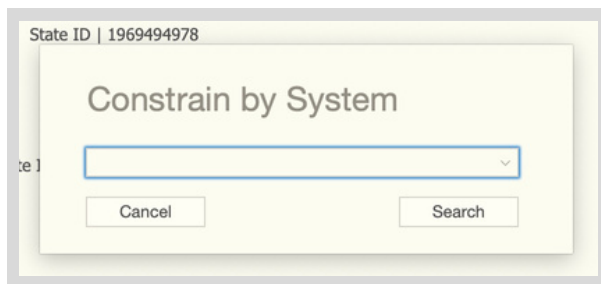
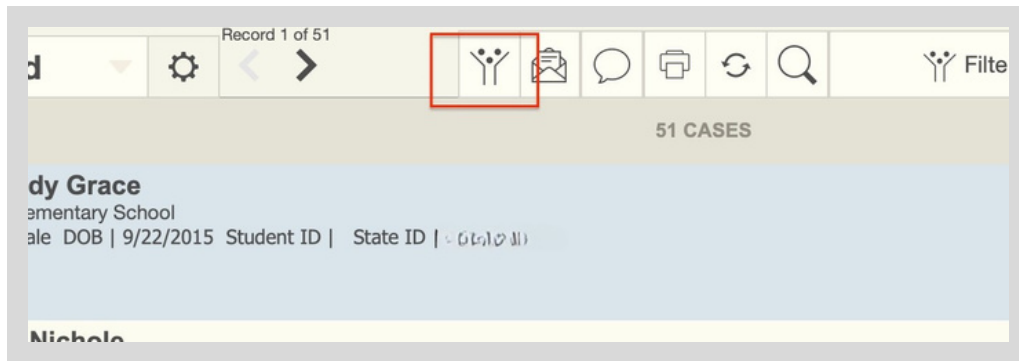


3. Choose the case worker's list of students you want to print.

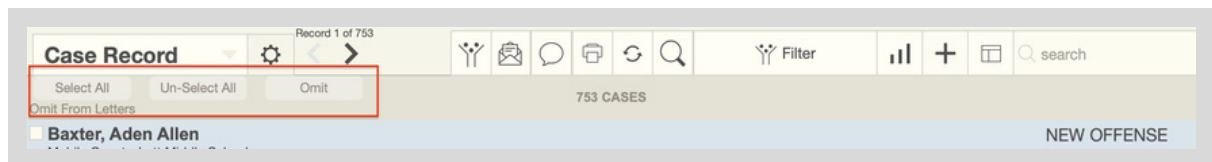




Another option is to generate letters by school system.

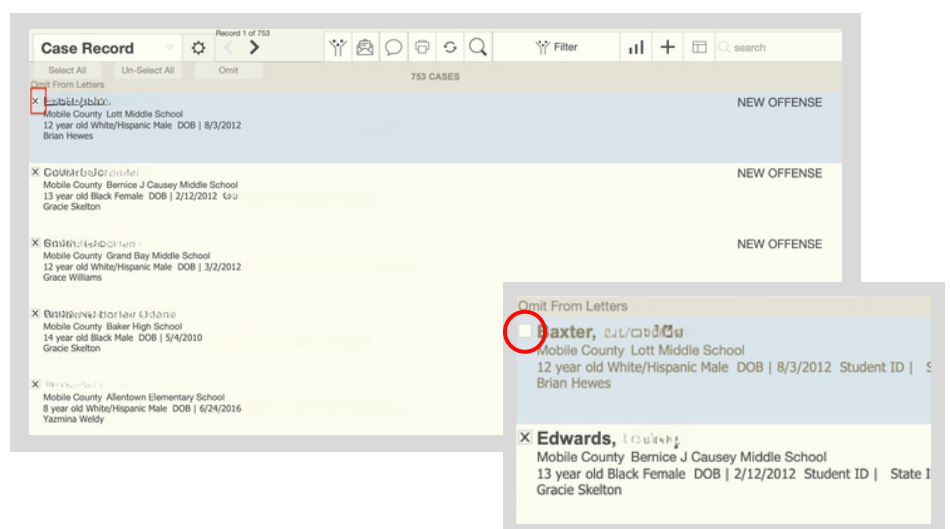


If you only want to send to a few of the students in 3 UA, 4 UA, 1 violation, 2 violation or Weapons lists, you may “Select All” students and only choose the students needed.



By choosing “Select All,” you are removing “x” letters from the list to print. If you want to print one or more students, simply uncheck their name.

Unchecking each checkbox will allow you to print only those letters by hitting the “Omit” button to omit all other letters.



# Student Info Tab

Clicking on a Student Name will open the Student Info page. Most of this data will come from ALSDE, but additional information can be added here.

Journal Notes are displayed on this screen. Letters are automatically posted here when sent.

The screenshot shows the 'NEW OFFENSE' page for Khylee Marcella Henderson. The left sidebar contains an 'ASSESSMENT CHECKLIST' with items like 'Juvenile Status Check', 'Parent/Guardian Criminal History', 'School Records Review', etc. The main area is divided into 'Student Info' and 'Journal'. The 'Student Info' section includes fields for First Name (Khylee), Middle Name (Marcella), Last Name, Suffix, Circuit (1), State ID, Student ID, DOB/Age (12/27/2011 / 13), Grade (07), Gender (F), Race (B), Guardian (Mother), City (Grove Hill), State (AL), Zip, Email, Cell Phone, Home Phone, and Juvenile Court Status (Pending). There are also checkboxes for '504 Plan', 'IEP Plan', 'ELL', 'Homeless', 'Diagnoses/Medications', 'S04 Plan', 'IEP Plan', 'ELL', and 'Homeless'. The 'Journal' section shows a case note from 4/29/23 by Script Schedules.

Details regarding the student displayed here can be used to locate a student residence and email a student directly. To contact the primary guardian quickly, you can either text or email by clicking one of these icons.

This close-up view highlights the 'Guardian' section of the Student Info tab. It shows the 'Guardian' dropdown menu with 'Mother' selected. Below the dropdown, there are icons for 'Text' and 'Email' next to the guardian's name. A red box highlights these icons. Another red box highlights the '504 Plan', 'IEP Plan', 'ELL', and 'Homeless' checkboxes.

Primary Guardian information is displayed on this screen, but is added in the school tab.

Case Status will show “New Offense” when initially added from ALSDE. Once letters are sent it will display “In Progress.”

The first task to address for each student is to check Juvenile Court status.

Each status will indicate at what stage a student's case is currently being managed.

**Pending** — No determination has been made regarding Juvenile Court.

**New Offense** — The student is not currently active or has no record in Juvenile Court and is eligible for HFI participation.

**In Progress** — An Assessment letter has been sent.

**Active** — The Family Assessment is being conducted; Intervention plan created; IAT meeting involved.

**Closed** — Reasons for Closure will be based on several criteria, including no further action needed.

See Tools and Tips on [page 70](#) to gather more details on these statuses.

A screenshot of a software interface showing a dropdown menu for case status. The menu is open, displaying the following options: IN PROGRESS (highlighted in blue), PENDING, NEW OFFENSE, IN PROGRESS (highlighted in blue), ACTIVE, and CLOSED. The background shows a form with fields for Status, Date Created, Created By, Case Officer, Date Assigned, and Source.

A list of “Reasons for Closure” will automatically close the case for you. Always choose a Reason for Closure when closing a case.

A screenshot of a software interface showing a dropdown menu for reasons for closure. The menu is open, displaying the following options: IIP Completed, Adequate parental capability demonstrated, Did not meet admission criteria, No further action needed, Active Juvenile Status, Withdrawn to private school, Withdrawn to Home School, Withdrawn other, and Drop out. The background shows a form with fields for assigned date (May 15, 2024), School Request, Created By (Betty Barker), Referred (Absences), closed, and a list of counts (Fresh Counts, In Count: 2, etc.).



Case Status	ACTIVE
Date Created	4/13/2024 1:06:44 AM
Created By	ALSDE API
Case Officer	Brian Hewes
Date Assigned	
Source	API
Reported By	Power School
Reason Reported	
Date Closed	
Reason for Closure	

Refresh Counts

Attendance Count: 30

Violation Count: 9

ASSESSMENT CHECKLIST	
Juvenile Status Check	<input type="checkbox"/>
Parent/Guardian Criminal History	<input type="checkbox"/>
Parent Interview	<input type="checkbox"/>
Child Interview	<input type="checkbox"/>
Education Records Review	<input type="checkbox"/>
School Personnel Interview, if available	<input type="checkbox"/>
NCFAS-G Intake Assessment scored	<input type="checkbox"/>
IIP with 3 Problems Developed	<input type="checkbox"/>
IIP reviewed with Parent/Guardian	<input type="checkbox"/>
IIP reviewed by IAT	<input type="checkbox"/>
IIP Implemented	<input type="checkbox"/>
All Referrals Documented	<input type="checkbox"/>
Utilization documented	<input type="checkbox"/>
Weekly Monitoring Documented	<input type="checkbox"/>
Case Closure Documented	<input type="checkbox"/>
NCFAS-G Closure Assessment Scored	<input type="checkbox"/>
Review with Case Supervisor	<input type="checkbox"/>
Supervisor Approval Documented	<input type="checkbox"/>

The checklist provided guides you as you serve the student and family. You can clearly document your process.

After each task is complete, you check it off or it is automatically checked off for you.

Reason Reported has been added back to the Student Detail page and will display on the IAT meeting information.

Case Status	ACTIVE
Date Created	4/13/2024 1:06:44 AM
Created By	ALSDE API
Case Officer	Brian Hewes
Date Assigned	
Source	API
Reported By	Power School
Reason Reported	
Date Closed	
Reason for Closure	

Refresh Counts

Guardians and Students can be assigned an ACES score from this tab.

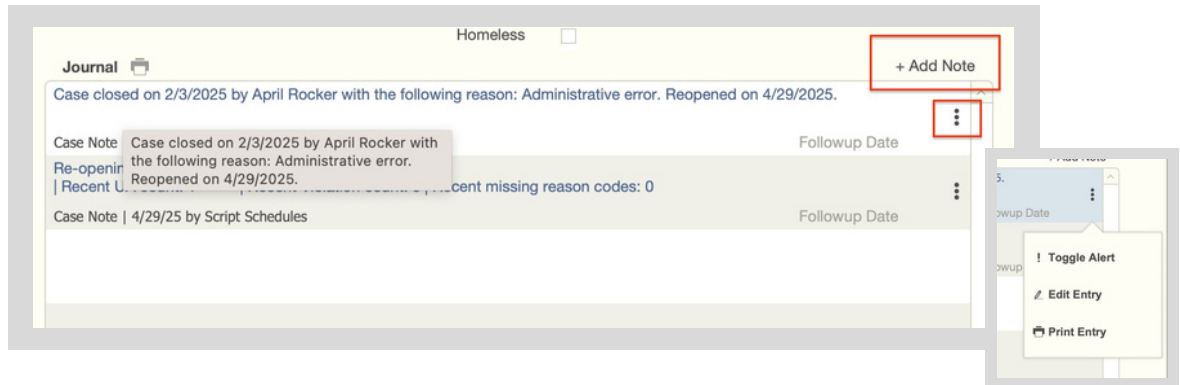
Guardian ACES Score	<input type="text"/>
Student ACES Score	<input type="text"/>

IIP   Journal   Images   Reports

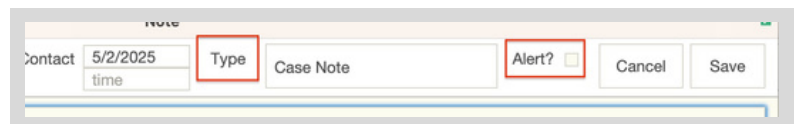
Suffix

A new note can be added by choosing the “+” button. A note completed by the user can be edited but it must be on the same date. A note can also be printed.

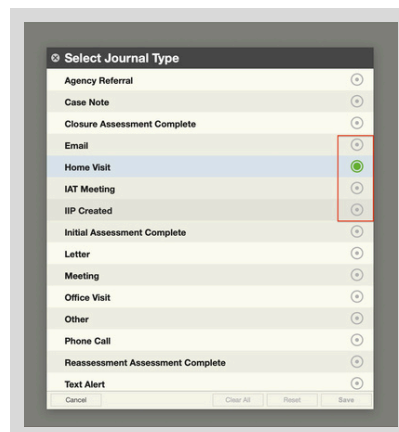
The 3 dots will give you options regarding your note. Also, hovering over a case note will display the entire note.



When the “+” button is chosen, a new note is created and you can record the type of note you added. You can select multiple Journal Types if needed.

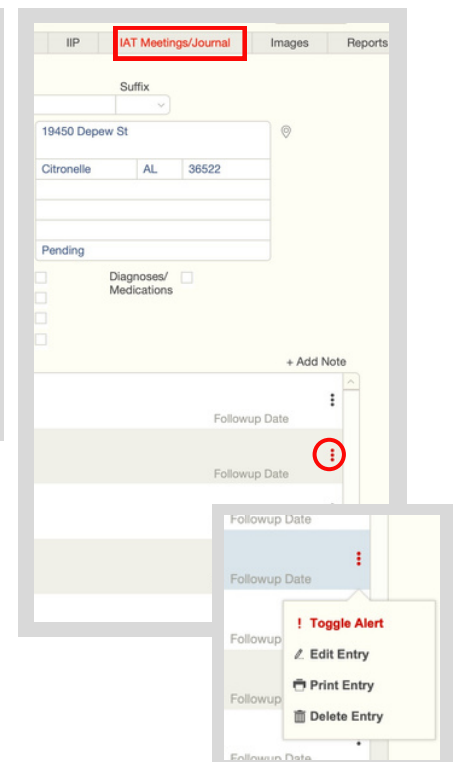


Also, checking the “Alert” will highlight the exclamation point on the screen and turn the Journal tab “red” on the Student Detail tab.



When letters are sent from the system, a journal entry is automatically created.

The “red” alert can also be chosen from this screen if needed.



# School Tab

The School tab retains the student's school history and additional information gathered in interviews.

Primary Guardian is also chosen here so it will display on the Student Info screen. Choosing the “flag” icon will display the Primary Guardian.

Always record the guardian relationship and number of adults and children in the household. The count of the household members will be recorded from the NCFAS-G assessment automatically.

The screenshot displays the 'Case Record' for Lucas Sebastian Abarham. The 'ACTIVE' status is shown at the top. The 'School History' section lists the current school as McDavid-Jones Elementary School. The 'Guardian' section shows Celina as the primary guardian. The 'Assessment Checklist' on the left includes items like 'Juvenile Status Check', 'Parent/Guardian Criminal History', and 'NCFAS-G Intake Assessment scored'. The 'Guardian' section on the right includes fields for 'Returned', 'Citronelle', 'AL', '36522', and 'Flag icon by icon'.

# Attendance/Violations Tab

The Attendance/Violations tab will display the current information from ALSDE regarding a student's absences in the “Attendance” tab.

## Attendance Tab

It will provide for the current year a count of Unexcused and Excused Absences for a specific student who qualifies for HFI assistance. Letters can be sent by email, text, or print from this screen by “clicking” either of the checkboxes and a date will automatically populate when sent. Each checkbox when checked will print, text, and/or email the letter to the guardian and a case note is automatically created in the Journal.

Petition requests and/or exceptions when checked will print and/or email notifications to the attendance office and guardian.

**Case Record** Bobby Sue Jones

Case Status: CLOSED  
 Date Created: 2/22/2021 10:20:51 AM  
 Created By: Traci Whipkey  
 Case Officer: Mitzi Howard  
 Date Assigned: Feb 9, 2021  
 Source: Community Request  
 Referred By: DHR  
 Reason Referred:  
 Date Closed: 2/29/2021  
 Reason for Closure: Active Juvenile Status

Refresh Counts  
 Attendance Count: 13  
 Violation Count: 1

**CHECKLIST**

Attendance Warning Letter	<input checked="" type="checkbox"/>
Violation Warning Letter	<input checked="" type="checkbox"/>
Assessment Letter	<input checked="" type="checkbox"/>
Petition Request to School	<input type="checkbox"/>
Show Entire List	<input type="checkbox"/>

**Attendance/Violations**

Type	Date Absent	Acad Year	Created
UA	5/6/2024	2024	7/29/2024 9:36:03
UA	5/3/2024	2024	7/29/2024 9:36:56
UA	5/2/2024	2024	7/29/2024 9:36:34
UA	5/1/2024	2024	7/29/2024 9:36:16
SK	3/6/2024	2024	3/8/2024 12:04 PM
UA	2/29/2024	2024	3/8/2024 12:04:12
UA	2/28/2024	2024	3/8/2024 12:13:44
AA		2024	9/8/2023 12:24:45
DE		2024	10/19/2023 9:39
EX		2024	10/23/2023 3:30:57

**Attendance History**

Acad Year	Ex Abs	Unex Abs	Ex Tar	Unex Tar
2024	4	3	1	1

**Attendance**

EWT ☐  
 Attend? ☐ Attended ☐ Didn't Attend  
 EWT Date:

Warning ☒ Date: 7/29/2024  
 Assessment ☒ Date:   
 Petition Request ☐ Date:

Excused Absences: 4  
 Unexcused Absences: 7  
 Excused Tardies: 1  
 Unexcused Tardies: 1

See Letters, Texting, and Email sections for further details.

**Choose Letter Delivery Type**

How do you want to send the letter?

Print   
 Email   
 Email with Attachment   
 Both   
 Text Message   
 Check box and update date   
 Cancel

This is the Early Warning Truancy section before it goes to Petition. You will be adding the information for EWT here.

EWT is early warning truancy (the last step before court action). The boxes are whether or not they attended and the date they were scheduled to attend.

When an Early Warning Truancy meeting is attended, a Journal Entry will be created for you.

EWT ☒  
 Attend? ☒ Attended ☐ Didn't Attend  
 EWT Date: 4/2/2024

Attendance types (UA, EA, DE, SK) indicate when letter should be sent to students. The attendance type is a description from ALSDE. These codes are updated regularly from schools.

The icon at the top right will allow you to see an explanation of all attendance types, but hovering over the type will also give the definition of the absence.

#### Tool Tips on Absences:

Type	Date Absent	Acad Year	Created	
SK	3/25/2024	2024	3/26/2024 3:09:58	X
UA	3/22/2024	2024	3/26/2024 3:09:41	X
OSS	2/9/2024	2024	3/7/2024 4:05:34	X
AA	3/2/2024	2024	3/7/2024 4:03:01	X
DE	2/6/2024	2024	3/7/2024 4:02:10	X
SK	2/5/2024	2024	3/7/2024 4:01:47	X

HFI displays any absences from any school or school system even if a student transfers.

## Violations Tab

Violations are also imported from ALSDE. Please refer to the ALSDE Data Code Manual for Infraction Codes or Disposition Codes for detailed explanations of these violations.

Explanations of the Infraction code can be reviewed with the “i” icon.

Violation History from prior years will display at the bottom. The creation of violation letters uses the same functionality as attendance.

If a student has been arrested for the violation, you may indicate the arrest by checking this box.

The screenshot shows the 'Case Record' for 'Corrie Ten Boom'. The 'Violations' tab is active, displaying a table of violations. The 'Arrest' checkbox is circled in red. The table includes columns for School, Occurrence Date, Infraction Code, and Days. The 'Arrest' checkbox is located next to the 'Infraction Code' column.

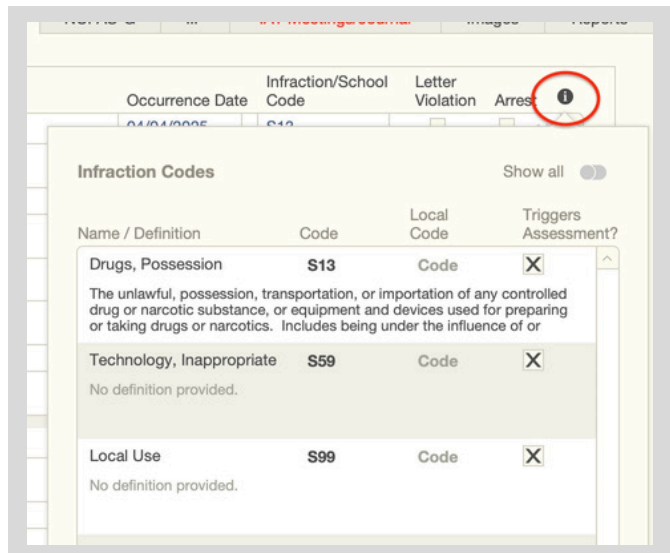
School	Occurrence Date	Infraction Code	Days	Arrest
0138	04/08/2024	S11	3	<input type="checkbox"/>
0138	03/26/2024	S10	2	<input type="checkbox"/>

The screenshot shows the 'Violations' tab with a table of violations. The 'Arrest' checkbox is circled in red. The table includes columns for School, Occurrence Date, Infraction Code, and Days. The 'Arrest' checkbox is located next to the 'Infraction Code' column.

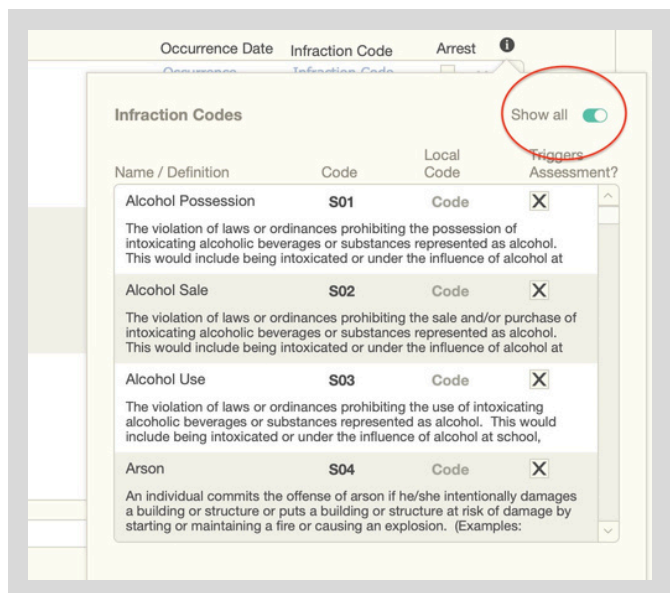
School	Occurrence Date	Infraction Code	Days	Arrest
0138	04/04/2024	S58	2	<input type="checkbox"/>



Clicking on the icon in the Violations tab will display the list the behavior violations of the student, if any.



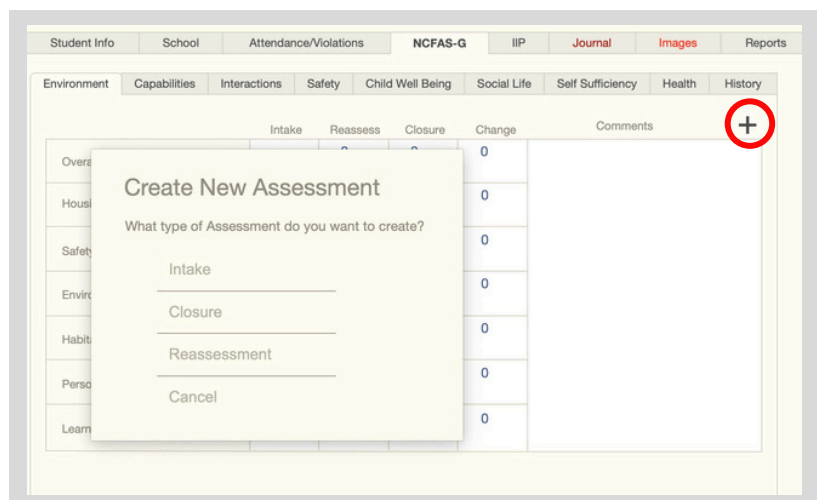
If you toggle the "Show All" button, all violation codes will display.



## NCFAS-G

The Assessment categories will allow you to assess what the primary needs of the student are.

After clicking the "+" button, you will choose whether this assessment is an Intake, Closure, or Reassessment.



An overall summary of all domains will display. Choose the ranking for each sub-scale in each domain with comments.

All fields are required including the # of adults and # of children in a household.

When a sub-scale has a negative number, the sub-scale will turn red.

Notes created on the NCFAS-G Assessment for each subscale will display in the comments sections of the Case Record.

The screenshot shows the NCFAS-G assessment interface. On the left, there is a list of domains and sub-scales. The 'ENVIRONMENT 4 Environmental' sub-scale is highlighted. On the right, there is a large text area for notes. A tooltip is visible over the 'ENVIRONMENT 4 Environmental' sub-scale, stating: 'Notes can be created by hovering over the sub scale name.'

The screenshot shows the NCFAS-G assessment interface. It displays a grid of sub-scales with red circles indicating negative values. The grid is organized into columns for different domains and sub-scales. The sub-scales are listed on the left, and the corresponding values are shown in the grid cells.

The screenshot shows the NCFAS-G assessment interface. It displays a grid of sub-scales with red circles indicating negative values. The grid is organized into columns for different domains and sub-scales. The sub-scales are listed on the left, and the corresponding values are shown in the grid cells.

Completing the NCFAS-G in the system ensures the capture of data for families and the legislature.

When # of adults and # of children are added to the NCFAS-G assessment, the totals populate the Primary Guardian in the School tab.

The screenshot shows the NCFAS-G assessment interface. It displays the 'Employment' section with fields for '# of Adults in Household' and '# of Children in Household'. The values are entered as 2 and 1 respectively.



Zoom In Reset Zoom # Adults 2 # Children 3 Intake Assessment for Jacob LeWayne Shepard Goals Save Cancel

<b>A. ENVIRONMENT 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
A. ENVIRONMENT 2 Housing		1	NA	+2	+1	0	-1	-2	-3	UK
A. ENVIRONMENT 3 Safety in the		2	NA	+2	+1	0	-1	-2	-3	UK
A. ENVIRONMENT 4 Environmental		3	NA	+2	+1	0	-1	-2	-3	UK
A. ENVIRONMENT 5 Habitability of		4	NA	+2	+1	0	-1	-2	-3	UK
A. ENVIRONMENT 6 Learning		5	NA	+2	+1	0	-1	-2	-3	UK
<b>B. PARENTAL CAPABILITIES 1</b>		1	NA	+2	+1	0	-1	-2	-3	UK
B. PC 2 Supervision of Children		1	NA	+2	+1	0	-1	-2	-3	UK
B. PC 3 Disciplinary Practices		2	NA	+2	+1	0	-1	-2	-3	UK
B. PC 4 Provision of Development &		3	NA	+2	+1	0	-1	-2	-3	UK
B. PC 5 Use of Drugs & Alcohol		4	NA	+2	+1	0	-1	-2	-3	UK
B. PC 6 Promotes & Safeguards		5	NA	+2	+1	0	-1	-2	-3	UK
B. PC 8 Parent(s)/s(Caregiver(s)		7	NA	+2	+1	0	-1	-2	-3	UK
B. PC 9 Parental Resilience		8	NA	+2	+1	0	-1	-2	-3	UK
<b>C. FAMILY INTERACTIONS 1</b>		1	NA	+2	+1	0	-1	-2	-3	UK
C. FI 2 Bonding with Child		1	NA	+2	+1	0	-1	-2	-3	UK
C. FI 3 Communication with Child		2	NA	+2	+1	0	-1	-2	-3	UK
C. FI 4 Expectations of Child		3	NA	+2	+1	0	-1	-2	-3	UK
C. FI 5 Mutual Support Within the		4	NA	+2	+1	0	-1	-2	-3	UK
C. FI 6 Relationship Between		5	NA	+2	+1	0	-1	-2	-3	UK
C. FI 7 Family Routines/Rituals		6	NA	+2	+1	0	-1	-2	-3	UK
C. FI 8 Family Recreation and Play		7	NA	+2	+1	0	-1	-2	-3	UK
<b>D. FAMILY SAFETY 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
D. FS 2 Absence/Presence of DV		1	NA	+2	+1	0	-1	-2	-3	UK
D. FS 3 Absence/Presence of Other		2	NA	+2	+1	0	-1	-2	-3	UK
D. FS 4 Absence/Presence of		3	NA	+2	+1	0	-1	-2	-3	UK
D. FS 5 Absence/Presence of		4	NA	+2	+1	0	-1	-2	-3	UK
D. FS 6 Absence/Presence of Sexual		5	NA	+2	+1	0	-1	-2	-3	UK
D. FS 7 Absence/Presence of Neglect		6	NA	+2	+1	0	-1	-2	-3	UK
D. FS 8 Absence/Presence of Access		7	NA	+2	+1	0	-1	-2	-3	UK
<b>E. CHILD WELL-BEING 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 2 Child's Behavior		1	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 3 School Performance		2	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 4 Child's Relationship with		3	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 5 Child's Relationship with		4	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 6 Cooperation/Motivation		5	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 7 Child's Alcohol/Drug		6	NA	+2	+1	0	-1	-2	-3	UK
E. CW-B 8 Social and Emotional		7	NA	+2	+1	0	-1	-2	-3	UK
<b>F. YOUTH WELL-BEING 1</b>		1	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 2 Youth's Behavior		1	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 3 School/Employment		2	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 4 Youth's Relationship with		3	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 5 Youth's Relationship with		4	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 6 Cooperation/Motivation to		5	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 7 Youth's Alcohol/Drug		6	NA	+2	+1	0	-1	-2	-3	UK
F. YW-B 8 Social and Emotional		7	NA	+2	+1	0	-1	-2	-3	UK
<b>G. S/CL 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
G. S/CL 2 Social Relationships		1	NA	+2	+1	0	-1	-2	-3	UK
G. S/CL 3 Relationships with Child		2	NA	+2	+1	0	-1	-2	-3	UK
G. S/CL 4 Connection to		3	NA	+2	+1	0	-1	-2	-3	UK
G. S/CL 5 Connection to		4	NA	+2	+1	0	-1	-2	-3	UK
G. S/CL 6 Parent(s)/s(Caregiver(s)		5	NA	+2	+1	0	-1	-2	-3	UK
<b>H. SELF-SUFFICIENCY 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
H. SELF-SUFFICIENCY 2 Caregiver		1	NA	+2	+1	0	-1	-2	-3	UK
H. SELF-SUFFICIENCY 3 Family		2	NA	+2	+1	0	-1	-2	-3	UK
H. SELF-SUFFICIENCY 4 Financial		3	NA	+2	+1	0	-1	-2	-3	UK
H. SELF-SUFFICIENCY 5 Food and		4	NA	+2	+1	0	-1	-2	-3	UK
H. SELF-SUFFICIENCY 6		5	NA	+2	+1	0	-1	-2	-3	UK
<b>I. FAMILY HEALTH 1 Overall</b>		1	NA	+2	+1	0	-1	-2	-3	UK
I. FH 2 Parent(s)/s(Caregiver(s)		1	NA	+2	+1	0	-1	-2	-3	UK
I. FH 3 Parent(s)/2(Caregiver(s)		2	NA	+2	+1	0	-1	-2	-3	UK
I. FH 4 Parent(s)/2(Caregiver(s)		3	NA	+2	+1	0	-1	-2	-3	UK
I. FH 5 Child's Physical Health		4	NA	+2	+1	0	-1	-2	-3	UK
I. FH 6 Child's Disability		5	NA	+2	+1	0	-1	-2	-3	UK
I. FH 7 Child's Mental Health		6	NA	+2	+1	0	-1	-2	-3	UK
I. FH 8 Family Access to		7	NA	+2	+1	0	-1	-2	-3	UK

A new Intake Assessment does not clear any of the other fields or copy them to the history tab. Intake, Reassessment and Closure Assessments are displayed in the history tab when the case is closed.

Case Record Levi Elijah Thompson

Levi Elijah Thompson

Status: IN PROGRESS

Date Created: 5/1/2024 1:11:31 AM

Created By: ALSDE API

Case Officer: Mitzi Howard

Date Assigned:

Source:

Reason Referred:

Date Closed:

Reason for Closure:

Refresh Counts

Attendance Count: 2

Violation Count: 1

CHECKLIST

Filter

Attendance Warning Letter

Violation Warning Letter

Assessment Letter

Petition Request to School

Show Entire List

IN PROGRESS

Days Recorded in HFI: 96

Guardian ACES Score

Student ACES Score

Student Info

School

Attendance/Violations

NCFAS-G

IIP

Journal

Images

Reports

Environment

Capabilities

Interactions

Safety

Child Well Being

Social Life

Self Sufficiency

Health

History

Intake

Reassess

Closure

Change

Comments

Overall Environment

-1

0

Family lost home over job loss.

Housing Stability

-1

0

Safety in the Community

0

0

Environmental Risks

+1

0

Habitability of Housing

0

0

Personal Hygiene

0

0

Learning Environment

0

0

Each domain allows you to assess the personal well being of the student and make recommendations regarding their needs.

Environment

Capabilities

Interactions

Safety

Child Well

Youth Well

Social Life

Self Suff

Health

History

Intake

Reassess

Closure

Change

Comments

Overall Parental Capabilities

Supervision of Children

Disciplinary Practices

Provision of Developmental & Enrichment Opportunities

Use of Drugs & Alcohol Interferes with Parenting

Promotes & Safeguards Child's Education and Development

Parent(s)/s(Caregiver's Literacy

Parental Resilience

Goal

Services Provided

Utilization

Referral

Overall Parental Capabilities

Supervision of Children

Definitions

Clear Strength

Refers to caregivers' provision of age-appropriate supervision, such as setting limits for activities based on the children's ages. Caregivers are careful and attentive to children's needs in selecting substitute caregivers (babysitter, neighbor). Makes sure children feel comfortable and safe with substitute caregivers. Keeps track of children and knows children's friends. Infants and toddlers are under constant, consistent care and supervision in conditions and in surroundings that put the child at ease.

Baseline/Adequate

Refers to caregivers providing satisfactory supervision of children. Some limits are set on activities based on the children's ages. Some consideration given to selecting substitute caregivers, and some concern with children's comfort and feeling of security with substitute caregivers. Children's friends are not known, and location of children and children's friends. Infants and toddlers are under constant and adequate supervision, assuring that the child is safe, but circumstances may require a variety of caregivers, settings and surroundings.

Serious Challenge

Refers to caregivers' lack of age-appropriate supervision, or any supervision. Limits on activities of children are not set or set inconsistently. Little or no consideration given to selecting substitute caregivers (strangers, known abusers, persons under the influence of drugs/alcohol). No thought about children's comfort and feeling of security with substitute caregivers. Children's friends are not known, and location of children is not regularly known. Infants and toddlers are sometimes left unattended, or supervision is provided by other children incapable of attending to child's needs or assuring safety, or child is left in the care of incompetent or uncaring adults or in surroundings that pose risk to child safety or induce serious discomfort.

Once NCFAS-G is complete, each domain will display the rankings. Then goals and their referral agencies must be established.

Domains with negative scores in their overall category will change the title of the domain “red” to give indication of what areas need to be addressed with the student and their family.

The screenshot shows the NCFAS-G interface with tabs for Student Info, School, Attendance/Violations, NCFAS-G, IIP, Journal, Images, and Reports. The NCFAS-G tab is active, showing a table of domain scores:

Domain	Intake	Reassess	Closure	Change	Comments
Overall Environment	+2			0	
Housing Stability	0			0	
<b>Safety in the Community</b>	<b>-1</b>			0	
<b>Environmental Risks</b>	<b>-1</b>			0	
<b>Habitability of Housing</b>	<b>-3</b>			0	
Personal Hygiene	0			0	
Learning Environment	0			0	

Below the table, there is a section for Goal and Referral, with a red circle highlighting a "+" button in the top right corner.

The screenshot shows the NCFAS-G interface with domain descriptions:

- A. Environment - Housing Stability**  
Present housing is not threatened.
- A. Environment - Safety in the Community**  
Disturbances do not deter spending time outside.
- A. Environment - Habitability of Housing**  
Minimal problems in the home.
- A. Environment - Personal Hygiene**  
Children are generally appropriately dressed and groomed.
- A. Environment - Learning Environment**  
Refers to caregivers' occasionally planning time for learning activities. Caregivers do not actively seek out constant involvement with children's school, but make time available as requested. Some age-appropriate games or toys are present.
- A. Environment - Overall Environment**  
Refers to family experiencing a few minimal problems in the following areas: housing stability, safety in the community, environmental risks, housing habitability, personal hygiene, and learning environment. However, problems do not interfere in family's ability to function, and problems do not need to be addressed.

At the bottom of the screen, add a Goal for specific service on no more than 3 domains or subdomains.

Change the word “number” to “score” in the next to last paragraph

When you click the “+” button, it will open a list of possible services provided for each student based on their Intake number. Negative numbers indicate greater needs.

Always choose the Services Provided for this sub-domain, which will display on the IIP.

The screenshot shows the NCFAS-G interface with a list of services provided:

Goal	Date Referred	Follow-up Date	Referral	Services Provided	Utilization
Refers to family experiencing a few minimal problems in the following areas: housing stability, safety in the community, environmental risks, housing habitability, personal hygiene, and learning environment. However, problems do not interfere in family's ability to function, and problems do not need to be addressed.	4/29/2025		AltaPointe mental health treatment facility	Childrens Mental Health Services	Yes

A dropdown menu is open, showing a list of services provided:

- AltaPointe mental health treatment facility
- 100 Black Men-mentorship program
- 211- resource hotline
- Accel School System-alternative school
- Big Brothers, Big Sisters
- C.H.I.N.S.
- CAPP- drug class for MCPSS students
- Catholic Social Services- bill assistance
- Child Advocacy Ctr-
- Child support
- Consumer Credit Counseling

Each goal established should show a recommended community resource and their Services Provided, along with whether services are being utilized.

The dropdown list of of Community Service Agencies will display.

Change in Family Functioning - Information Only				
	Intake	Reassessment	Closure	Change
Overall Environment	0	0	-1	-1
Housing Stability	0	0	0	0
Safety in the Community	0	0	0	0
Environmental Risks	0	0	0	0
Habitability of Housing	0	0	0	0
Learning Environment	0	0	-1	-1

Goal	Date Referred	Referral	Services Provided	Utilization
Refers to family experiencing a few minimal issues in the following	4/29/2025	AltaPointe- mental health treatment facility	Childrens Mental Health Services	Yes

Once the Goal is chosen, then you may assign a Referral Agency or Agencies for the student.

Goal	Date Referred	Referral	Services Provided	Utilization
Refers to family experiencing a few minimal issues in the following	4/29/2025	AltaPointe- mental health treatment facility	Childrens Mental Health Services	Yes

For each goal established, set up a Follow Up Date for the goal and the data will display on your Dashboard for a reminder.

Goal	Date Referred	Follow-up Date	Referral	Services Provided	Utilization
Refers to family experiencing a few minimal issues in the following	4/29/2025	5/12/25	AltaPointe- mental health treatment facility	Childrens Mental Health Services	Yes

Always complete a reassessment if a case is not closed. Only create a new intake when you have a new offense or a case has been reopened.

	Intake	Closure	Change	Comments
Overall Parental Capabilities	+2		0	Progress can be reviewed here and discussed with student and parents.
Supervision of Children	0		0	
Disciplinary Practices	-1		0	
Provision of Developmental & Enrichment Opportunities	+1		0	
Use of Drugs & Alcohol Interferes with Parenting	+1		0	
Promotes Child's Education	0		0	
Controls Access to Media/Reading Material	-1		0	
Parent(s)/s/Caregiver(s)'s Literacy	-2		0	

## Duplicating a NCFAS-G

If a student lives with another student, this duplicate button will allow you to duplicate the NCFAS-G for all family members.

Closure	Change	Information Only	Comments

Once the duplicate button is chosen, a list of students will display. Choose the assessment type, based on the original students' NCFAS-G assessment.

**Select Target Students for Copy**

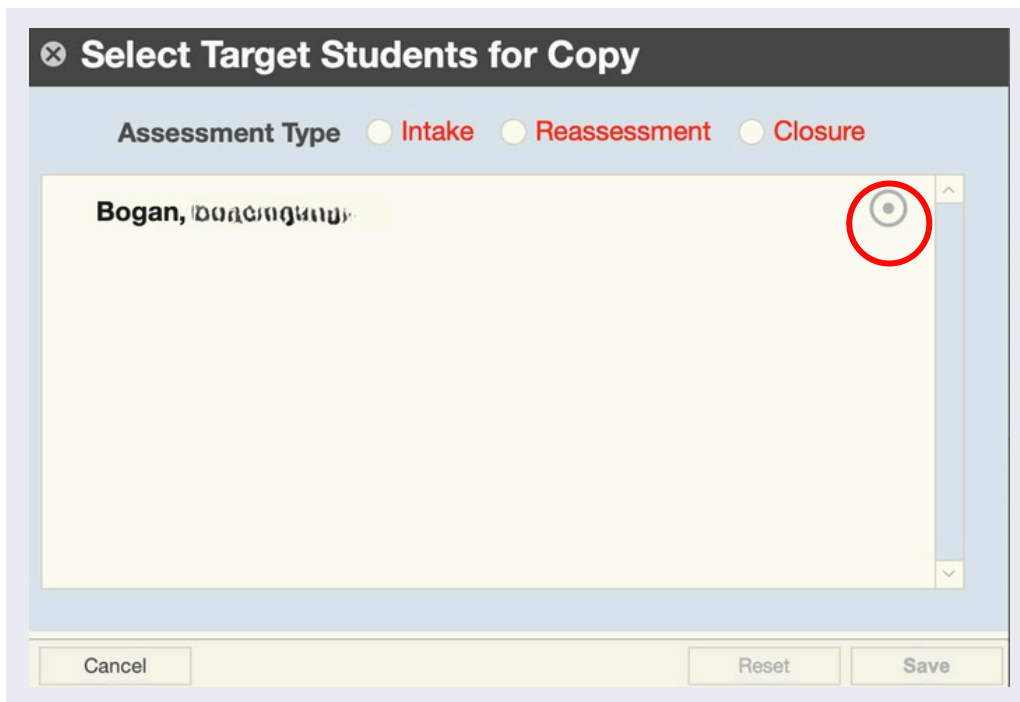
Assessment Type: ☐ Intake ☒ Reassessment ☐ Closure

search

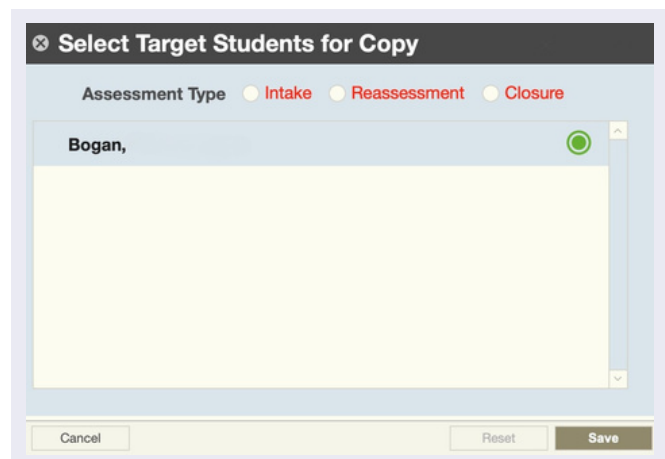
Reynolds, [Name]

Reynolds, [Name]

Click on the image to choose the student who will receive the NCFAS-G scores from the original student.



Press save and the document will be copied to the new student's assessment page.



When NCFAS-G is closed, the case will be closed and the Intake, Reassessment, and Closure Assessments will be displayed on the history tab. A reviewer may check for completeness and appropriate action by reviewing a closed case.

Once an Intake, a Reassessment (if needed), and a Closure Assessment have been completed, you may save it in History by creating a new Intake.

Student AGES Score

Student Info

School

Attendance/Violations

NCFAS-G

IIP

Journal

Images

Reports

Environment

Capabilities

Interactions

Safety

Child Well Being

Social Life

Self Sufficiency

Health

History

Type	Last Time Assessment	Modified Date	Created In History	Employee Moved To History
Reassessment		7/29/2024		Mitzi Howard
Closure		7/29/2024		Mitzi Howard
Intake		7/29/2024		Mitzi Howard

HELPING FAMILIES INITIATIVE

Family Assessment Form

STUDENT INFORMATION

Child Name: Gavin Scott

School: MSB

DOB: 06/20/2011

Race: Hispanic

Age: 13

Address: 123 Main Street, Mobile, AL 36688

Phone: (334) 555-1234

GUARDIAN INFORMATION

Guardian's Name: Jane Clark

Address: 456 Oak Ave, Mobile, AL 36688

Phone: (334) 555-5678

Employer:

ASSESSMENT

Referral by:

Cell: 334-555-9999

Date Assessment last Modified: 07/29/2024

Assessment Type: Final

ENVIRONMENT

	Status	Comments
Overall Environment	0	0
Housing Stability	0	0
Safety in the Community	0	0
Environmental Risk	0	0
Stability of Housing	0	0
Personal Hygiene	0	0
Learning Environment	0	0

Comments:

Prior assessments are stored in the History tab and pressing the Document icon will allow you to display the Assessment, which can be printed or emailed.

When a closure Assessment is completed, the case status is still "Active," but a Journal Entry is created stating the "IIP is complete."



# Individualized Intervention Plan (IIP)

The IIP for each student will be displayed based on the Goals chosen in each domain. You can print the IIP for any meetings you want to have with the parent or team members.

The agency who will be serving the student and/or their family will display here and you can choose who in the family will be receiving their services.

Services Provided is critical for statistical data needed by the state team. Please add the information for any and all Services Provided.

If additional notes need to be shared in the IIP, you may add them in the Notes field and they will display on the IIP report for parents.

Goal	Type of Services	Referral	Services Provided	Utilization
Good attendance and academic records		Tallassee Co BOE/School	Education Support	Yes

**IIP Notes**

**Other Referrals**

F	Services Provided	Tallassee Co BOE/School	Person	3/19/2025	Utilized
	Services Provided	Agency	Person <td>Date <td>Utilized</td> </td>	Date <td>Utilized</td>	Utilized

## IAT Meetings/Journal

Case notes can be added to the Journal and an alert (!) will turn the Journal tab red if a note is considered critical in a case.

Any time a Violation or Attendance Warning or Assessment is sent to a student a Note to the Journal is automatically added. All notes record the day and time they were added and by whom.

The 3 dots provides a drop down of the choices in the Journal. Follow up dates can be added to a journal note and it will display on the Dashboard under my cases.

Journal types drive ALL reports surrounding data gathered.

**Meetings**

**Meeting Topics**

Select a meeting...

**+ Add Note**

Attendance warning letter sent on 2/19/2025.

Attendance Warning Letter | 2/19/25 by Tim Enloe

Followup Date

**+ Add Note**

Followup Date

**! Toggle Alert**

**Edit Entry**

**Print Entry**



Notes can be deleted by administrators and team leaders.

Journal Notes can be printed if needed.

The screenshot shows a PDF document titled "HELPING FAMILIES INITIATIVE Notes" with the Seal of the State of Alabama at the top left. The document is divided into sections for "STUDENT INFORMATION" and "GUARDIAN INFORMATION".

**STUDENT INFORMATION**  
Child's Name: Corrie Boom  
School:  
DOB: 6/20/2011  
Race: Hispanic Sex: Female  
Address: 123 Main Street, Mobile, AL 36666  
Phone: 555-555-5555

**GUARDIAN INFORMATION**  
Guardian's Name: Jerry Guard  
Address: 206 test street, Mobile, AL 36605  
Phone: 111  
Employer:

**Date Created:** 4/2/2024 5:50:54 PM  
**Created By:** Mitzi Howard  
**Note Type:** Helping Families  
**Note:** Adding a new note here

Printed on 4/9/2024 11:34:56 AM by Mitzi Howard Page 1

## Images

Documents can be added to the student record by dragging the document into the Images section of the file, including photos of a student if needed.

Images can be emailed if necessary using the email icon on the images screen.

The screenshot shows the "IN PROGRESS" section of a student record system. It includes a "Days Open: 33" indicator and a "Guardian ACES Score" of 2. The "Student ACES Score" is 5. The "Journal" tab is selected, showing a list of notes and images.

Student Info	School	Attendance/Violations	NCFAS-G	IIP	Journal	Images	Reports
Type	Report Card						
Notes	Students						
Created	Developer	4/9/2024 11:44:22 AM					
Type	Photo of Student						
Notes	Corrie at 10 years old						
Created	Developer	4/9/2024 11:58:40 AM					

On the right side of the "Images" section, there is a list of images. The first image is titled "Attendance Corrie" and the second image is titled "Corrie at 10 years old".

If someone in the family has a criminal history, the word images will turn “red” and will display an icon next to the guardian name.

Always choose a type of image so that reports can be generated at a later time.

The screenshot shows a software interface with a top navigation bar containing tabs: Student Info, School, Attendance/Violations, NCFAS-G, IIP, Journal, Images (selected), and Reports. Below the tabs, there's a section titled 'IN PROGRESS' with a sub-header 'Days Recorded in HPI: /'. A 'Student ACES Score' field is also visible. The main content area displays a list of documents. A dropdown menu is open, showing options: Criminal History, Release of Information Form, Correspondence, Meeting Agenda, Photo of Student, and Report Card. The 'Criminal History' option is selected. The document list includes entries like 'Miltzi Howard' with a timestamp '7/24/2024 4:29:56 PM' and another entry with a timestamp '7/30/2024 4:54:24 PM'. There are also fields for 'type', 'notes', 'created by', and 'created timestamp'. On the right side, there are icons for document actions and a 'Drag Doc Here' area.

## Reports


Most reports have been moved to the Reports Module on the drop down menu at the top of your screen. Here are a few reports that can be handled on this tab.

The screenshot shows a dropdown menu for the 'Administration' tab. The menu options are: Dashboard, Case Record, Administration, Reports (highlighted with a red box), Referrals, and IAT Meetings.

The screenshot shows the 'Reports' tab in a software interface. The top navigation bar includes tabs: Student Info, School, Attendance/Violations, NCFAS-G, IIP, IAT Meetings/Journal, Images, and Reports (selected). The main content area has a 'Date Range' dropdown, 'Start Date' and 'End Date' input fields, and a 'School System' dropdown. There are also checkboxes for 'All' and 'Violations'. Below these fields, there are three links: 'Find Cases Without Case Officer Assigned', 'Assign Cases Without Case Officer Assigned', and 'Print This Violations List'.

# Individual Student Reports

## Print Violations List for a Specific Student



HELPING FAMILIES INITIATIVE  
Violations List

---

**STUDENT INFORMATION**  
Child's Name: Corrie Boom  
School:  
DOB: 6/20/2011  
Race: Hispanic      Sex: Female  
Address: 123 Main Street, Mobile, AL 36666  
Phone: 555-555-5555

---

**GUARDIAN INFORMATION**  
Guardian's Name: Jerry Guard  
Address: 206 test street, Mobile, AL 36605  
Phone: 111  
Employer:

---

**School:** Allentown Elementary  
**Grade Level:**  
**Infraction Descr:**  
**Infraction Date:** 3/26/2024  
**Date Created:** 3/7/2024  
**Narrative:** Disobedience

---

**School:** Allentown Elementary  
**Grade Level:**  
**Infraction Descr:**  
**Infraction Date:** 4/3/2024  
**Date Created:** 3/7/2024  
**Narrative:** Disorderly Conduct

---

Printed on 4/10/2024 4:02:27 PM by Mitzi Howard

Page 1

# Guardian Information

Primary Guardian information displays on the Student Info tab. The School tab contains additional information on all guardian contacts.

The screenshot shows a 'Case Record' form for a student named Justin. The form is divided into several tabs: Student Info, School, Attendance/Violations, NCFAS-G, IP, Journal, and Images. The 'Student Info' tab is currently selected. On the left side of the form, there is a sidebar with fields for Status (IN PROGRESS), Date Created (4/10/2024 1:06:07 AM), Created By (ALSDE API), Case Officer, Date Assigned, Source, Referred By, Reason Referred, Date Closed, Reason for Closure, and Juvenile Case. The main area of the form contains fields for Student Information: First Name, Middle Name, Last Name, Suffix, Circuit (13), State ID (1909176419), Student ID, DOB/Age (16), Gender (M), Race, Guardian Name (Lena Deakle), Address (8030 Easyway St), City (Irvington), State (AL), Zip (36544), Email, Cell Phone, and Home Phone. There is also a 'Journal' section at the bottom with an 'Add N' button.

If a guardian has a criminal history (which is recorded in the Images tab), then an icon will display by their name indicating the criminal history.

The screenshot shows a 'Guardian' information form for Lisa Puccio. The form includes fields for State ID (123456), Student ID (123456), DOB/Age (1/2/2000, 21), Grade, Gender (Female), Race (White), and Guardian Name (Lisa Puccio). A red circle highlights a small icon next to the name, and a tooltip below it reads 'Criminal History Involved'. There is also a 'Journal' section at the bottom with a printer icon.

In order for student guardian information to show up in the HFI Case Management...

1. In Power School, school personnel must enter a Student Profile, then enter Contact Management, click on the "Edit" pencil under Actions, and choose "Receives Mail" and "Custody" in order for the Contact to come into the HFI system.

**Student Profile** > **Contact Management** ☆

Academic Records >  
Attendance >  
Behavior >  
Compliance >  
Courses and Programs >  
Health >  
Postsecondary Readiness >  
School Enrollment >

Show All (+6)

Order	Name / Email	Relationship	Phone Type	Phone	Address	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
1	Robert Hall	Grandfather	Home	(335) 420-0386	601 West Valley Alexandria, AL 36004-0273		✓	✓	✓					✎
2	Kara Walker	Mother	Mobile	(335) 420-1418	601 West Valley Alexandria, AL 36004-0273	✓	✓	✓	✓					✎
3	Krista Bjork	Aunt	Mobile	(335) 420-0472	6107 Charles Dr Alexandria, AL 36004-1107			✓	✓		09/10/2021			✎
4	Jennifer Hall	Aunt	Mobile	(335) 420-0788	6107 Charles Dr Alexandria, AL 36004-0273		✓	✓	✓		09/10/2021			✎
5	John Bjork	Uncle	Mobile	(335) 420-0386	6107 Charles Dr Alexandria, AL 36004-1107			✓	✓		09/10/2021			✎

2. School personnel must choose "Receives Mail" on the Contact Management edit page for a contact to be added to HFI. "Custody" will initiate "Primary Guardian" status, but "Receives Mail" will at least show the guardian contact information for HFI.

**Details:** 1/11/2021 (P)

Active All

Relationship: Grandfather

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

☐ Has Custody

☒ Lives With

☒ School Pickup

☒ Emergency Contact

☒ Receives Mail

Notes

Approximately 4000 characters left

Original Contact Type:

PLEASE NOTE: The "Receives Mail" checkbox only displays on the Power School Quick Contacts screen below and not in the Student Profile -- Contact Management area without clicking the "edit" pencil icon.

**Quick Contacts**

Student: Perez Guerrero, Angelique email:

Name / Email	Relationship	Phone	Receives Mail	Custody	Lives With	Emerg. Contact	School Pickup	Data Access
Brenda Guerrero Cardoso Current (P) :	Mother	Mobile: Home: Work:	✓	✓	✓	✓	✓	
Victor Perez-Martinez Current (P) :	Father	Mobile:		✓	✓	✓	✓	
Natalia Perez Current (P) :	Aunt	Mobile:				✓	✓	
Brenda Cardoso Current (P) :	Mother	Mobile:	✓	✓	✓	✓	✓	
Victor Perez-Martinez Current (P) :	Father	Mobile:	✓	✓	✓	✓	✓	

Student Profile

Academic Records

Attendance

Behavior

Compliance

Courses and Programs

Health

Postsecondary Readiness

School Enrollment

Contact Management

Show All (+0)

Order	Name / Email	Relationship	Phone Type	Phone	Address	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
	Robert Hall	Grandfather	Home	(204) 455-1100	600 Main St, Alexandria, IL 60010-1000		✓	✓	✓					
	Kara Walker	Mother	Mobile	(204) 455-1100	600 Main St, Alexandria, IL 60010-1000	✓	✓	✓	✓					
	Krista Bjork	Aunt	Mobile	(204) 455-1100	600 Main St, Alexandria, IL 60010-1000			✓	✓		09/10/2021			
	Jennifer Hall	Aunt	Mobile	(204) 455-1100	600 Main St, Alexandria, IL 60010-1000		✓	✓	✓		09/10/2021			
	John Bjork	Uncle	Mobile	(204) 455-1100	600 Main St, Alexandria, IL 60010-1000			✓	✓		09/10/2021			

# Administration

## Users

Only Administration and Team Leaders may add a User to the solution. Team Leaders may add Users for their district only.

The screenshot shows the 'Set Up & Administration' window with the 'Users' tab selected. On the left, there is a list of users with search and delete icons. On the right, there is a form for adding or editing a user. The form includes fields for Name, Position, Email, Signature, Scanned Signature, Account Name, Account Privileges, and Schools. The user being edited is Deshanna Austin, with the email address austinde@jccal.org.

## Community Resources

Please add Community Resources within your Circuit, including email addresses. We recommend adding email addresses so that future emails may be sent.

The screenshot shows the 'Set Up & Administration' window with the 'Community Resources' tab selected. The table below lists various community resources, including Decatur City Schools, First Baptist Church, Hamilton Church of Christ, Hamilton Methodist Church, Head Start - Decatur, AL, Hope's Choice, Restoration Family Services, AltaPointe, Catholic Social Services, Clarke Co DHR, Clarke Co Health Dept, and Clarke Co School District.

Agency Name	Circuit	Services Provided	Phone	Email	Address	City	State	
Decatur City Schools - McKinney Vento	?	service	256-552-3045	email	1625 Danville Rd. SW	Decatur	AL	×
First Baptist Church	?	Information & Referral	email	email	address	Hamilton	AL	×
First Baptist Church	?	Information & Referral	email	email	address	Hamilton	AL	×
First Baptist Church - Hamilton	?	Information & Referral	email	email	address	Hamilton	AL	×
Hamilton Church of Christ	?	Information & Referral	email	email	address	Hamilton	AL	×
Hamilton Methodist Church	?	Information & Referral	email	email	address	Hamilton	AL	×
Head Start - Decatur, AL	?	service	256-565-7087	email	1909 Central Parkway, SW	Decatur	AL	×
Hope's Choice	?	Information & Referral	2059325380	email	1031 Temple Ve N	Fayette	AL	×
Restoration Family Services	?	Information & Referral	205-430-2674	email	238 3rd St SW	Hamilton	AL	×
AltaPointe	1	Childrens Mental Health Services	251-387-1817	email	address	city	AL	×
Catholic Social Services	1	service	251-246-0131	email	address	city	state	×
Clarke Co DHR	1	service	251-275-7001	email	address	city	state	×
Clarke Co Health Dept	1	service	251-275-3772	email	address	city	state	×
Clarke Co School District	1	service	251-250-2155	email	address	city	state	×

By choosing the “+” button, you can now assign multiple services provided by an agency. This information is critical to counting how many services each agency provides.



# Documents

All letters may be viewed but not edited. State staff and developers will make changes as needed.

The screenshot shows the 'Documents' tab within the 'Set Up & Administration' window. It features two main sections: 'Templates' and 'Placeholders'. The 'Templates' section has a table with columns for 'Type' and a '+' button. The 'Placeholders' section has a table with columns for 'Placeholder', 'Value', and a '+' button. The 'Placeholders' table contains the following data:

Placeholder	Value	
Absence_Dates	05/23/2024	x
Absences	5	x
Case_Officer	Yolanda Washington	x
Circuit	13	x
DA_Email	da@gmail.com	x
DA_Name	John James McCoy	x
DA_Signature		x
DA_Title	Mobile County District Attorney	x
First_Letter_Sent_Date	01/23/2024	x
Guardian_Address_Block	123 Main St	x
Guardian_Name_Full	Robert Louis Stevenson	x
Guardian_Name_Last	Stevenson	x
Infraction_Dates	05/23/2024	x
Last_School	Ensley High School	x
School	Ensley High	x
Student_Name_Full	Robert Louis Stevenson	x

# InterAgency Team

InterAgency Team Members can be added to the system by clicking the “+” button.

The screenshot shows the 'InterAgency Team' tab within the 'Set Up & Administration' window. A modal form titled 'InterAgency Team Member' is open, allowing users to add new team members. The modal form contains the following fields:

- Name: title, first, middle, last, suffix
- Agency: dropdown menu
- Address: street, city, state, zip
- Email: email
- Phone: phone

Buttons for 'Cancel' and 'Save' are located at the bottom of the modal form.

The IAT member agency will be chosen from the drop down list of agencies for each circuit.

The screenshot shows a web application interface for 'Administration' with a 'Set Up & Administration' section. The 'InterAgency Team' tab is selected. A form titled 'InterAgency Team Member' is displayed, featuring fields for Name (title, first, middle, last, suffix), Agency, Circuit, Address, Phone, and Email. The 'Agency' dropdown menu is open, showing a list of agencies including 'AltaPointe- mental health treatment facility', 'Family Involvement Program BCS', '100 Black Men of Metro Birmingham Mentoring', '100 Black Men- mentorship program', '1st UMC', '211- resource hotline', '3. Northwest AL Mental Health Agency', '988', 'A G. Gaston Boys and Girls Club', 'ABC Counseling Services', 'Accel School System-alternative school', 'Achievers For Life', 'Adolescent Total Care', 'Agape of Central AL', 'AL Adult and Teen Challenge', 'AL Care Network', and 'AL Career Ctr'.

Adding an email and phone number will help you maintain contact for IAT meetings.

You can also cancel adding a new member.

The screenshot shows the same 'InterAgency Team Member' form as in the previous image. A 'Confirm' dialog box is open, asking 'Cancel adding a new team member?'. The dialog box has 'No' and 'Yes' buttons. The 'No' button is highlighted.

# School System

School system information will be displayed here. Adding details for each system will assist caseworkers with contacts.

# Circuit

The circuit tab will provide details about the current District Attorney. Each of these fields can be added to each letter by State Staff and developers only.

# Preferences

Provide canned email information for Warning Letters. Each HFI member will add a privacy notification to their individual emails.

# Reports

Multiple reports can be generated based on date range, school system, school and, in some instances, a case worker.

The screenshot shows a web interface for generating reports. At the top, there's a 'Reports' tab. Below it, there are filter fields: 'Date Range' (a dropdown), 'Start Date' and 'End Date' (text inputs), 'School System' (a dropdown), and 'School' (a dropdown). To the right of these is an 'All' checkbox. Below the filters is a red-bordered box containing a grid of report links:

<a href="#">Attendance Report</a>	<a href="#">IIP Report</a>
<a href="#">Casual Referrals</a>	<a href="#">NCVAS-G Report</a>
<a href="#">Count of Letters Sent</a>	<a href="#">Percent of Negative Scores by Domain (Pie Chart)</a>
<a href="#">Count of Letters Sent - Student List</a>	<a href="#">Percent of Negative Scores by Sub-Scale (Pie Chart)</a>
<a href="#">Count of Violations</a>	<a href="#">Services Provided Report</a>
<a href="#">Count of Journal Entries by Type</a>	<a href="#">Students With No Journal Updates in the Last 45 Days</a>
<a href="#">Export Honor Roll Addresses</a>	

## Attendance Reports

Attendance reports provide the number UA/SK per school.

	A	B	C	D	E
1	Circuit: System, School	Count_UA	Count_SK		
2	Circuit: 8	7592	0		
3					
4	Morgan County Schools	2821	0		
5	Albert P Brewer High School	411	0		
6	Eva School	98	0		
7	Leon Sheffield Magnet Elem	82	0		
8	Sparkman Elementary School	82	0		
9	Priceville Elementary School	153	0		
10	Priceville Junior High School	37	0		
11	Priceville High School	238	0		
12	Union Hill School	45	0		
13	West Morgan Elementary School	143	0		
14	West Morgan Middle School	165	0		
15	West Morgan High School	177	0		
16	Cotaco School	315	0		
17	Danville High School	143	0		
18	Danville Middle School	81	0		
19	Danville-Neel Elementary School	127	0		
20	Falkville Elementary School	175	0		
21	Falkville High School	285	0		
22	Lacey's Spring Elementary School	146	0		
23					
24	Decatur City Schools	3759	0		
25	Austin High School	834	0		
26	Austinville Elementary School	127	0		
27	Chestnut Grove Elementary	140	0		
28	Decatur High School	762	0		
29	Eastwood Elementary School	35	0		
30	Frances Nungesser Elementary	106	0		
31	Austin Junior High School	374	0		
32	Decatur Middle School	315	0		
33	Woodmeade Elementary School	135	0		
34	Austin Middle School	308	0		
35	Julian Harris Elementary School	120	0		
36	Benjamin Davis Elementary	61	0		
37	West Decatur Elementary School	77	0		
38	Decatur High Developmental	9	0		
39	Oak Park Elementary School	168	0		
40	Banks-Caddell Elementary	101	0		
41	Walter Jackson Elementary	87	0		
42	Center for Alternative Place	87	0		
43					
44	Hartselle City Schools	1012	0		
45	Barkley Bridge Elementary School	72	0		
46	Hartselle High School	386	0		
47	Crestline Elementary School	138	0		
48	FE Burleson Elementary School	87	0		
49	Hartselle Intermediate School	152	0		
50	Hartselle Junior High School	183	0		
51					

Attendance Report		
	UA (Unexcused)	SK (Skipping)
<b>Circuit: 4</b>	15575	62
<b>System: Dallas County</b>	5434	0
School: Brantley Elementary School	444	0
School: Bruce K Craig Elementary School	251	0
School: Dallas County High School	761	0
School: JE Terry Elementary School	95	0
School: Keith Middle-High School	254	0
School: Salem Elementary School	517	0
School: Southside High School	801	0
School: Southside Primary School	302	0
School: Tipton Durant Middle School	563	0
School: Unique Situations	0	0
School: Valley Grande Elementary School	791	0

## Count of Letters Sent

**Count of Letters Sent with Student Demographics** — includes a list of student names and their demographics. This list can be exported as an EXCEL document or .pdf document. This report includes emails, texts, and letters.

Letters Sent													
	Attendance Text	Behavior Text	Assessment Text	Petition Text	Attendance Email	Behavior Email	Assessment Email	Petition Email	Attendance Mail	Behavior Mail	Assessment Mail	Petition Mail	Attendance Behavior
<b>Circuit: 4</b>	0	0	0	0	25	2	1	9	97	43	96	9	122 45
System: Dallas County	0	0	0	0	25	2	1	9	97	43	96	9	122 45
Dallas County High School	0	0	0	0	25	2	1	9	97	43	96	9	122 45

EXCEL Count of Letters Sent:

1	School_Name	count_attendance_letters_sent	count_behavior_letters_sent	count_assessment_letters_sent	count_petition_letters_sent								
2	Auburn Early Education Center	0	0	5	0								
3	Auburn High School	2	0	41	0								
4	Auburn Junior High School	1	0	17	0								
5	Cary Woods Elementary School	0	0	5	0								
6	Creekside Elementary School	0	0	5	0								
7	Dean Road Elementary School	0	0	1	0								
8	Drake Middle School	0	0	9	0								
9	East Samford School	1	0	0	0								
10	Margaret Vandrough Elementary School	0	0	3	0								
11	Oglethorpe Elementary School	0	0	4	0								
12	Pick Elementary School	0	0	1	0								
13	Richland Elementary School	0	0	3	0								
14	Woodland Pines Elementary School	0	0	6	0								
15	Wrights Mill Road Elementary School	0	0	3	0								
16	Beauregard Elementary School	0	0	9	0								
17	Beauregard High School	0	0	4	0								
18	Beulah Elementary School	1	0	0	0								
19	Beulah High School	0	0	1	0								
20	East Smiths Station Elementary School	0	0	8	0								
21	Loachapoka Elementary School	0	0	1	0								
22	Loachapoka High School	1	0	3	0								
23	Sanford Middle School	0	0	3	0								
24	Smith Station Freshman Center	0	0	0	0								
25	Smiths Station High School	2	0	29	0								
26	Smiths Station Junior High School	2	0	9	0								
27	South Smiths Station Elementary School	0	0	8	0								
28	Wacochee Elementary School	0	0	4	0								
29	West Smiths Station Elementary School	0	0	10	0								
30	Carver Primary School	0	0	15	0								
31	Fox Run School	1	0	7	0								
32	Jeter Primary School	0	0	11	0								
33	Morris Avenue Intermediate School	0	0	6	0								
34	Northside School	0	0	5	0								
35	Opelika High School	4	0	84	1								
36	Opelika Middle School	0	0	31	0								
37	Southview Primary School	0	0	8	0								
38	Unique Situations	0	0	0	0								
39	West Forest Intermediate School	0	0	19	0								

## Count of Letters Sent - Student List

Letters Sent								
Student Name	Student State ID	DOB	Gender	Race	Attendance	Behavior	Assessment	Petitions Request Exception
<b>Circuit: 4</b>					865	125	407	7
System: Dallas County					396	59	191	0
Atondo, [REDACTED]		1/17/2013	F	M			11/26/2024	
Austin, [REDACTED]		7/27/2014	M	B	11/21/2024			
Boone, [REDACTED]		4/2015	M	B	9/23/2024		10/7/2024	
Bradley, [REDACTED]		14/2015	M	B	10/18/2024			
Bryan, [REDACTED]		4/2014	F	W	10/18/2024			
Crowe, [REDACTED]		24/2015	F	B	10/31/2024			
Eaton, [REDACTED]		11/9/2015	M	B	10/18/2024			
Flores, [REDACTED]		16/2012	M	W	11/21/2024			
Foster, [REDACTED]		9/2013	F	B	10/18/2024			
Gree, [REDACTED]		7/2013	F	B	10/18/2024	9/23/2024	10/7/2024	
Harris, [REDACTED]		2018	M	B	9/23/2024			



NCFAS-G Report

NCFAS-G REPORT

Student Name

Initial Date

Reassess Date

Closure Date

Caseworker

Circuit: 4

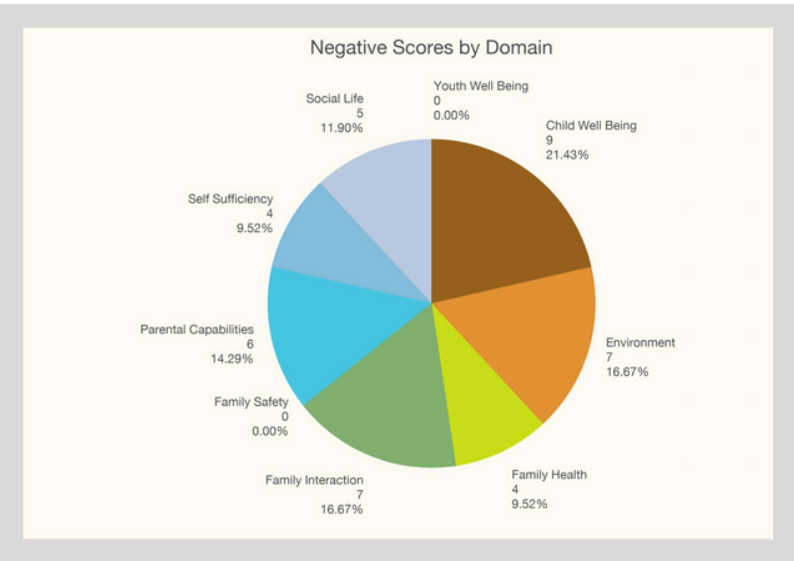
11/22/2024

Joyce Peoples

Services Provided Report

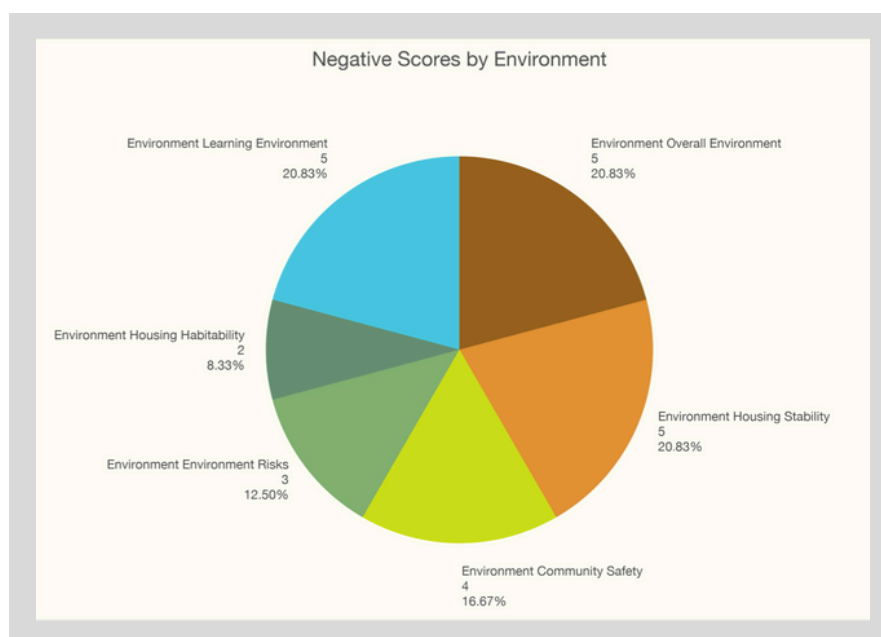
School System	Dallas County										
HFI Specific Program Services		K-5th	6th-8th	9th-12th	Female	Male	Black	Hispanic	White	Other	
Assessments		5	5	5	5	5	5	5	5	5	
Home Visits		5	5	5	5	5	5	5	5	5	
AD		5	5	5	5	5	5	5	5	5	
GP		5	5	5	5	5	5	5	5	5	
Letters		5	5	5	5	5	5	5	5	5	
Total		5	5	5	5	5	5	5	5	5	
Other Referrals - Community Services		K-5th	6th-8th	9th-12th	Female	Male	Black	Hispanic	White	Other	
Addiction Counseling/Training		5	5	5	5	5	5	5	5	5	
Child Care/After School		5	5	5	5	5	5	5	5	5	
Clothing		5	5	5	5	5	5	5	5	5	
Domestic Violence/Rape/Sexual Assault Support		5	5	5	5	5	5	5	5	5	
Education Support		5	5	5	5	5	5	5	5	5	
Food Support		5	5	5	5	5	5	5	5	5	
Housing/Utilities Support		5	5	5	5	5	5	5	5	5	
Job Placement/Prep/Training		5	5	5	5	5	5	5	5	5	
Legal Assistance		5	5	5	5	5	5	5	5	5	
Medical Care Services		5	5	5	5	5	5	5	5	5	
Mental Health Counseling		5	5	5	5	5	5	5	5	5	
Transportation		5	5	5	5	5	5	5	5	5	
Total		5	5	5	5	5	5	5	5	5	

Percent of Negative Scores by Domain (Pie Chart)





## Percent of Negative Scores by Sub-Scale (Pie Chart)



# Referrals

Information Referrals can be added when a formal case is not created.

A screenshot of a web application interface for adding referrals. At the top, there is a tab labeled "Referrals" with a dropdown arrow and a "+" button to its right. Below the tab is a table with four columns: "Date", "Circuit", "Agency", and "Service". The first row contains the following data: "8/2/2024" in the Date column, "10" in the Circuit column, "Family Involvement Program BCS" in the Agency column, and "Food" in the Service column. The "Service" cell is highlighted with a blue border and a small "x" icon to its right. Below the table is a large, empty yellow rectangular area.

Date	Circuit	Agency	Service
8/2/2024	10	Family Involvement Program BCS	Food

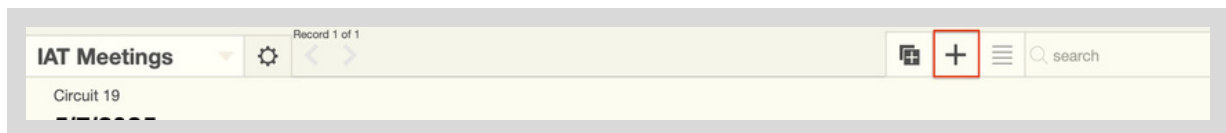
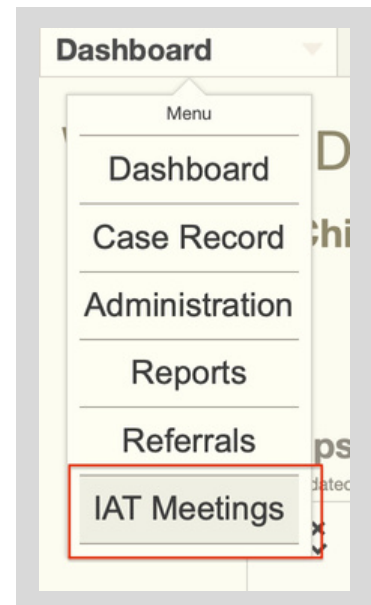
Each referral can have a different circuit chosen.

A screenshot of the same web application interface, but with a dropdown menu open for the "Circuit" column of the second row. The first row remains the same. The second row has "8/5/2024" in the Date column. The "Circuit" column for the second row has a dropdown menu open, showing a list of options: "0", "1", "2", "3", "4", "5", "6", "7", "8", "9", "10", and "10.1". The "Service" column for the second row is empty. The "x" icon is visible to the right of the "Service" cell.

Date	Circuit	Agency	Service
8/2/2024	10	Family Involvement Program BCS	Food
8/5/2024	<ul style="list-style-type: none"><li>0</li><li>1</li><li>2</li><li>3</li><li>4</li><li>5</li><li>6</li><li>7</li><li>8</li><li>9</li><li>10</li><li>10.1</li></ul>		

# IAT Meeting

To create an IAT meeting, choose the “+” button and an IAT meeting will automatically generate.



After the meeting display shows, choose a date for your IAT meeting.

Auto reminders will be sent to ALL IAT Team members 2 weeks prior to the meeting date. But the auto reminder date can be changed if needed.

A screenshot of the 'IAT Meeting' details form. The title is '5/15/2025 9:00 AM'. Below the title, it says 'Reminders Sent on 5/1/2025' with a green checkmark. There are three tabs: 'Details & Attendees' (selected), 'Students', and 'Documents/Files'. The form contains several input fields: 'Date' (5/15/2025, highlighted with a red box), 'Start Time' (9:00 AM), 'End Time' (11:00 AM), and 'Location' (courthouse). Below these, there is a 'Send Reminders on...' field with the date 5/1/2025 (highlighted with a red box) and an information icon (i) next to it. A 'Meeting Link' field is also visible.

After the meeting date is chosen, choose a date to send a reminder to your IAT team with student names. If the meeting is on Zoom or Teams, you can add the URL and it will be included in the reminder email that is sent.

The screenshot shows a web interface for setting up a meeting reminder. At the top, a header states "Reminders will be sent on 4/4/2025". Below this are three tabs: "Meeting Info", "Students", and "Documents/Files". The "Meeting Info" tab is active. It contains a "Date" field with "5/7/2025" and a "Send Reminders on..." field with "4/4/2025". The "Send Reminders on..." field is highlighted with a red box. A tooltip is displayed over the "Send Reminders on..." field, containing the following text: "On this date at 8:00 AM, a reminder will be sent from **noreply@hfiAlabama.org** to all meeting attendees. Your circuit's team leader (Carolyn Locke) will be copied on it as well. The email will include the list of students for discussion, as well as date, time, location, and a meeting URL (if specified)." Below the "Send Reminders on..." field is a "Meeting Notes" section with a text area.

Once the time, location, and URL are added, "Select Members" for your meeting.

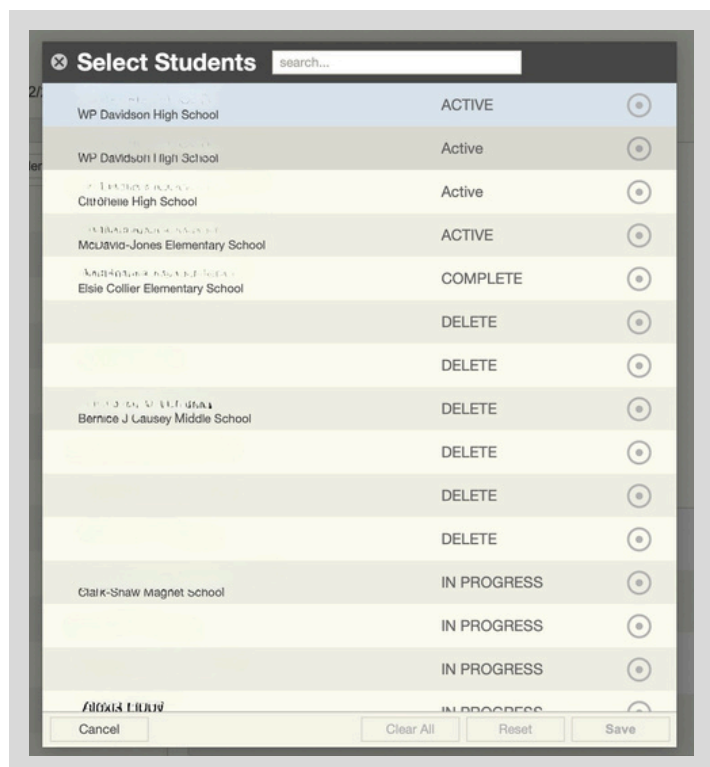
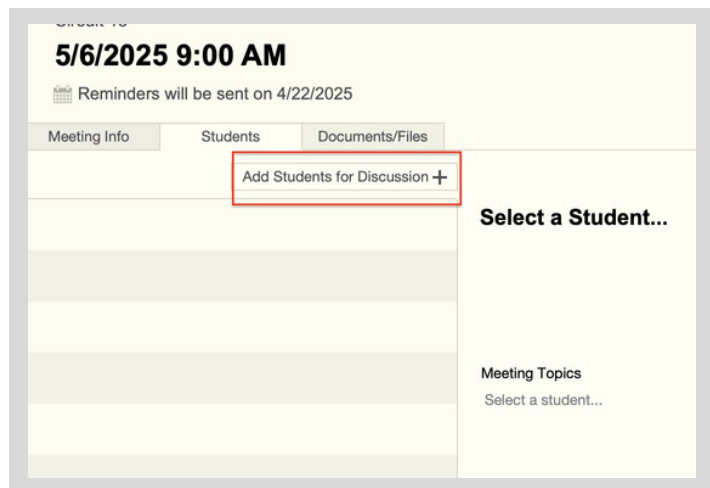
The screenshot shows the "Attendees" section of the meeting setup interface. It features a table with three columns: Name, Email, and a menu icon (three vertical dots). The table lists three attendees: David Howard (AltaPointe- mental health treatment facility, david@mossrock.com), Mitzi Howard (AltaPointe- mental health treatment facility, mitzi@mossrock.com), and Mitzi Howard1 (Big Brothers, Big Sisters, pianomitzi@gmail.com). A red box highlights the "Select Members" button, which is represented by an envelope icon and a plus sign (+).

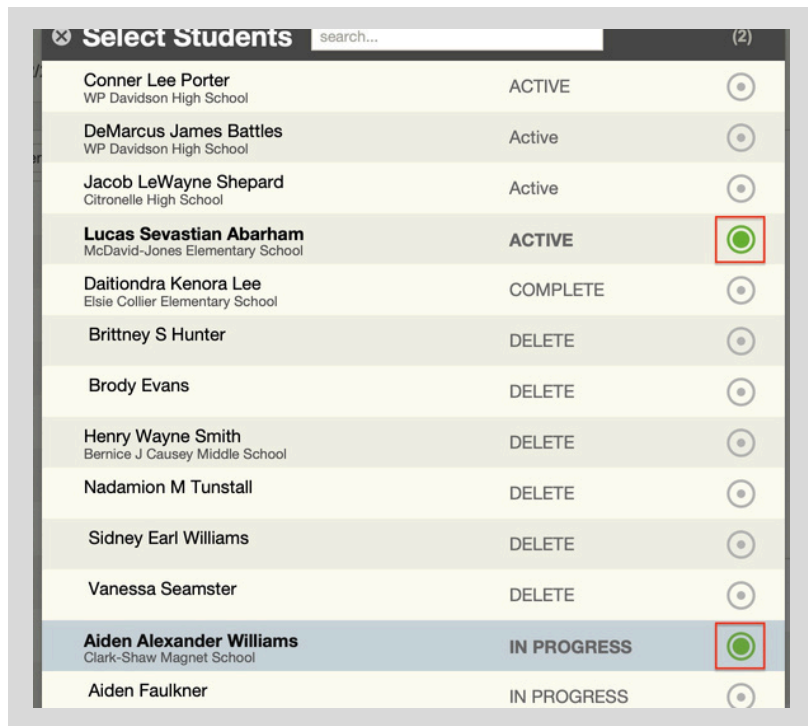
Team members will display and will be sent a reminder on the established date if their emails are added to the Interagency Team tab in the Administration section. You may email all team members at once or you can email them individually.

You can email individual team members or remove them.

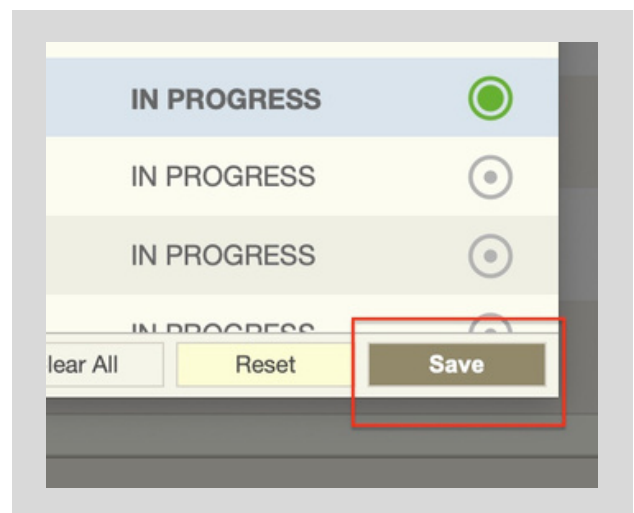


Next, go to the Students tab and add students your IAT team will review.





Once chosen, hit the Save button and the student along with their Journal notes will display in a list for you.



You can add details for discussion on the Meeting Topics which will be emailed to ALL team members (if needed).

Also, if you need additional details, the small button with the arrow will take you to their case.

The screenshot displays a software interface for managing student cases. On the left, a list of students is shown: Aiden (IN PROGRESS) and Lucas (ACTIVE). Each student entry has a small icon with a right-pointing arrow. The main panel shows details for Aiden: 14 year old Black Male, Student State ID: 618043040, Case Status: IN PROGRESS, and Reason Reported: (blank). To the right of these details are checkboxes for 504 Plan, IEP Plan, ELL, Homeless, and Diagnoses/Medications. Below the student details is a 'Meeting Topics' section with a large text input area. At the bottom is a 'Journal' section containing entries: 'Student started counseling.', 'IAT Meeting | 4/15/25 by Developer', 'Excused EWT', and 'Case Note | by Brittany Miller'.

Once an IAT meeting is completed and you want to duplicate it for a future event, hit the duplicate button and it will add all of the students and the IAT team members for your next event.

Also, the “+” will allow you to create a new IAT meeting.

The screenshot shows a toolbar for 'IAT Meetings'. It includes a dropdown menu, a gear icon, a 'Record 1 of 2' indicator, and navigation arrows. On the right side of the toolbar, there are four icons: a close button (X), a duplicate button (two overlapping squares), a plus button (+), and a list icon (three horizontal lines). A search bar with the text 'search' is also present.



# Letters

Currently, one template is being used by circuits. We're working on multiple templates for offices.

More coming soon.....

Assessment Letter Template

Assessment Letter

type

Active? ☒

Header...

English

<<Date\_Today>>

<<Guardian\_Name\_Full>>  
<<Guardian\_Address\_Block>>  
Absence Date: <<Absence\_Date\_Recent>> - Infraction Date: <<Infraction\_Date\_Recent>>

Dear <<Guardian\_Name\_Full>>,

It has been reported to the Helping Families Initiative that your child, <<Student\_Name\_Full>>, may benefit from additional resources to succeed in school.

One of our top priorities is to build a relationship with you and develop a plan to reduce the possibilities of future legal interaction.

We look forward to working together to keep your child on the path to graduation and future success.

Please contact us within five (5) days so you can connect with the Case Officer assigned to your family. Contact <<Case\_Officer>> at <<Case\_Officer\_Phone>> to review with you the resources and options that can support you and your child in this journey.

Respectfully,

<<DA\_Signature>>  
<<DA\_Name>>  
District Attorney  
<<Circuit>> Judicial Circuit  
Case Officer: <<Case\_Officer>> <<Case\_Officer\_Phone>>

Spanish

Absences

Absence\_Dates

Absence\_Date\_Recent

Case\_Officer

Case\_Officer\_Phone

Circuit

DA\_Email

DA\_Name

DA\_Signature

DA\_Title

Date\_Today

First\_Letter\_Sent\_Date

Guardian\_Address\_Block

Guardian\_Name\_Full

Guardian\_Name\_Last

Infraction\_Dates

Infraction\_Date\_Recent

Offense\_Date

Offense\_Name

School

Student\_State\_ID

Student\_Name\_Full

System

# Emailing

From the case lists on your Dashboard, emails can be sent from several different places. When you decide to send a batch email, you can choose how you want to reach out to a family. If an email is present in the system, the email will be sent.

Currently, emails work with Outlook “Classic” software ONLY.

A screenshot of a web application interface showing a modal window titled "Choose Letter Delivery Type". The modal is centered on a light yellow background. The title is in a bold, dark grey font. Below the title is the question "How do you want to send the letter?". There are eight options listed, each with a horizontal line to its right: "Print", "Email", "Email with Attachment", "Print and Email", "Text Message", "Email and Text", "Check box and update date", and "Cancel". The background shows a blurred view of a case list with columns for ID and State ID, and some text like "1973701665" and "1971907389".

ID | State ID | 1973701665

### Choose Letter Delivery Type

How do you want to send the letter?

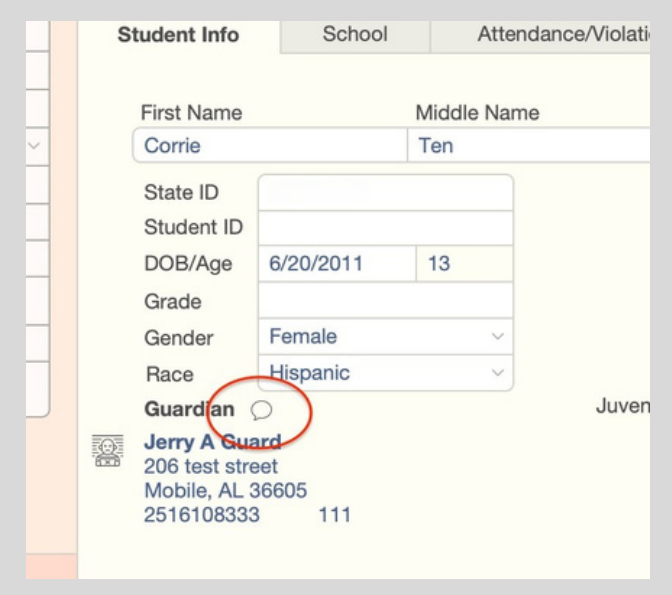
- Print
- Email
- Email with Attachment
- Print and Email
- Text Message
- Email and Text
- Check box and update date
- Cancel

nt ID | State ID | 1971907389

# Texting

You can send one-way texts to a guardian, but you are limited to 1600 characters. Each circuit must provide an HFI Office Phone number for their circuit, which will be sent to the guardian. If your phone number is added to your User record, then you will have the choice to add your personal number as well.

**Student Info tab** — next to Primary Guardian information



Student Info		School	Attendance/Violati
First Name	Middle Name		
Corrie	Ten		
State ID			
Student ID			
DOB/Age	6/20/2011 13		
Grade			
Gender	Female		
Race	Hispanic		
Guardian			
Jerry A Guard			
206 test street			
Mobile, AL 36605			
2516108333 111			

**School Tab** — next to each name of family listed.



Guardian			
Jerry	A	Guard	
206 test street		Mobile	
		AL	36605
2516108333		111	
pianomitz@gmail.com		Alternate email	
Employment			
Relationship			
# of Adults in Household	Adult #	# of Children in Household	Children #

Text messages can be customized and phone numbers can be added.

Text: Jerry A Guard 251-333-1099

Please contact me at |

Your Phone(s)  
◀ (205) 837-1318  
Insert  
Circuit Office Phone  
◀ (844) 396-7301

Cancel Send

When a phone number is present, it can be added to the message.

Text: Jerry A Guard 251-333-1099

Please contact me at |

Your Phone(s)  
◀ (205) 837-1318  
Insert  
Circuit Office Phone  
◀ (844) 396-7301

Cancel Send

Phone numbers auto fill when the arrows are chosen.

Text: Jerry A Guard 251-333-1099

Please contact me at (205) 837-1318 or (844) 396-7301

Your Phone(s)  
◀ (205) 837-1318  
Circuit Office Phone  
◀ (844) 396-7301

Cancel Send

Here is the default message to the guardian if they try to reply to the message.

This number is not monitored and does not receive replies. Goodbye.

# Create Texting Templates

Click the pencil to add/edit text templates. Only Team Leaders and Admins have this ability.

Text: Jerry A Guard 251-333-1099

Text message...

Your Phone(s)

(205) 253-5616  
Alternate Phone

Circuit Office Phone

(205) 837-1318

Templates

Cancel Send

< Templates

+

Assessment Letter

Assessment Letter

Your student, <<Student Name>>, is eligible for an NCFAS-G assessment with Helping Families Initiative.

Placeholders

Student Name

Guardian Name

UA Count

Violation Count

HFI Office Phone

Current User Phone

Current User Name

Current User Email

Current Date

Meeting Info...

Date

Time

Location

Preview Use Template

Create a template using the placeholders on the right. Hover over the "?" icons for helpful info on how placeholders work.

## Batch Texting

In addition to sending letters or email, you will be able to batch send “Text” messages to families.

You can send text messages to all families who have a cell phone. Families who do not have a cell phone will not receive a text and must be handled by either email or letter.

When batch texting you may type a personal message or choose one of the templates you create for your families.

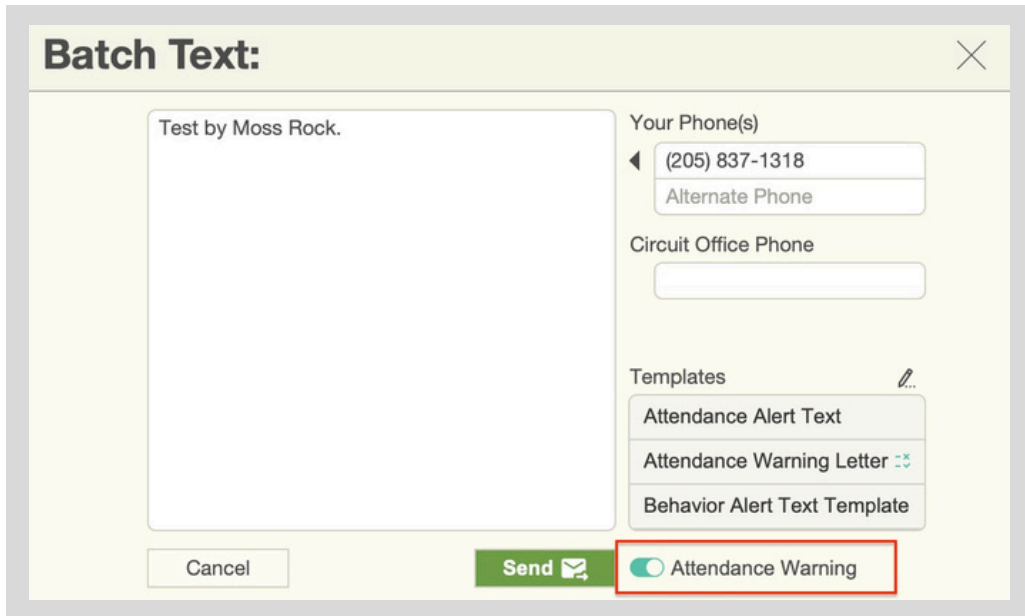
In order for the text templates to generate a journal entry, change case status, and record letter counts, assign one of the following.

On each template you want to use to create an Attendance, Behavior or Assessment letter count, choose one of the following radio buttons to cause a journal entry to be created for you.



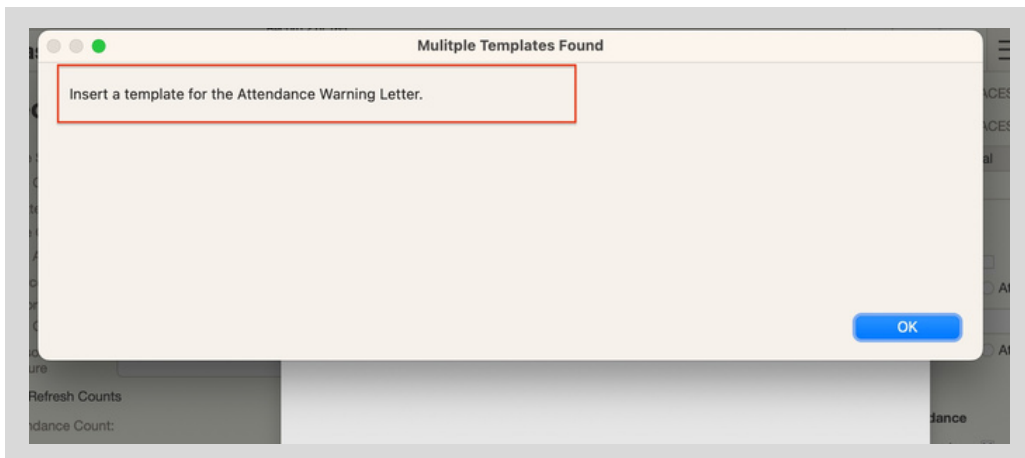
Once the choice of template has been made, the indicator for how it will be managed in HFI will display below.

If you choose not to have this text be counted in the letter count, you can toggle off the Attendance image on this screen.



The 'Batch Text' dialog box features a large text area on the left containing the text 'Test by Moss Rock.'. To the right, there are input fields for 'Your Phone(s)' (showing '(205) 837-1318') and 'Alternate Phone', and a 'Circuit Office Phone' field. Below these is a 'Templates' list with three options: 'Attendance Alert Text', 'Attendance Warning Letter' (which is highlighted with a green checkmark and a small icon), and 'Behavior Alert Text Template'. At the bottom, there are 'Cancel' and 'Send' buttons, and a red-bordered box containing a toggle switch labeled 'Attendance Warning' which is currently turned on.

If when batch texting you have more than one warning template, the system will prompt you to choose one template to use.



The 'Multiple Templates Found' dialog box is a light-colored window with a title bar. It contains a text box with the message 'Insert a template for the Attendance Warning Letter.' and an 'OK' button in the bottom right corner.

Choosing the template automatically fills the information for each family when batch texting.

**Batch Text:**

Hi. This is a courtesy notification your child has missed 3 or more days of school. Please turn in excuses for any additional absences. If you need assistance from the Helping Families Initiative, please call 334-657-8536. If this information is incorrect, please disregard this notice. Thank you.

Your Phone(s)  
(205) 837-1318  
Alternate Phone

Circuit Office Phone  
(334) 558-3242

Templates  
AC Attendance Alert  
AC Behavior Alert  
CC Attendance Alert

Cancel Send Attendance Warning

Lastly, press send and text messages will be sent to all families involved.

**Batch Text:**

Hi <<Guardian Name>>, your student, <<Student Name>>, has <<Absence Count>> absences. This is a warning.

Your Phone(s)  
(205) 837-1318  
Alternate Phone

Circuit Office Phone  
(205) 444-4444

Templates  
Assessment Letter  
Attendance Warning  
Circuit 13 Attendance

Cancel Send

Clicking "Use Template" will navigate back to the text message body and insert the template. For single texts, each placeholder is replaced with the matching data. For batch texts, student-specific placeholders are not replaced until the user clicks "Send".

**Text:** Jerry A Guard 251-333-1099

This is a reminder from Helping Families Initiative that you have a meeting with (205) 253-5616 on {Date}, {Time}, at {Location}. If you have any questions, please call HFI at (205) 837-1318.

Add date, time and/or location.  
Bold and italics will not display on the recipient's phone.

Circuit Office Phone  
(205) 837-1318

Templates  
Meeting Reminder

Cancel Send

Simply replace the "{Date}", "{Time}" and "{Location}" placeholders to send. Users will be prevented from sending the text if these placeholders remain in the text message body.

The screenshot shows a text message composition window. At the top, the recipient's name "Jerry A Guard" and phone number "251-333-1099" are displayed in separate fields. The main text area contains a pre-filled reminder message: "This is a reminder from Helping Families Initiative that you have a meeting with (205) 253-5616 on 12/17/2024, 11:00 AM, at 123 Test Drive. If you have any questions, please call HFI at (205) 837-1318." To the right of the text area, there are fields for "Your Phone(s)" with a dropdown menu showing "(205) 253-5616" and an "Alternate Phone" field, and a "Circuit Office Phone" field with a dropdown menu showing "(205) 837-1318". Below these is a "Templates" section with a dropdown menu showing "Meeting Reminder". At the bottom, there are "Cancel" and "Send" buttons. The "Send" button is green and features an envelope icon.

# Merge Process

To merge students, go to the case record for one of the students you want to merge.

The screenshot shows the 'Case Record' for 'Test Shanetta'. The case status is 'CLOSED'. The left sidebar contains a 'CHECKLIST' with items like 'Pending Juvenile Status', 'Attendance Warning Letter Sent', 'Violation Warning Letter Sent', 'Assessment Letter Sent', and 'Petition Request to School'. The main area displays 'Student Info' with fields for First Name (Test), Middle Name (Shanetta), Last Name (Shanetta), State ID (101010), Student ID (111111), DOB/Age (10/06/06), Grade (7), Gender (Female), Race (White), and Guardian (Juvenile Court Status: Pending). The 'Journal' tab is active, showing a note from 'Helping Families' dated 10/10/24.

Go to the Reports tab and click the “Merge” button in the lower right corner.

The screenshot shows the 'Case Record' for 'Test Shanetta' with the 'Reports' tab selected. The 'Merge' button is highlighted with a red circle in the bottom right corner. The 'Reports' tab includes filters for 'Date Range', 'Start Date', 'End Date', and 'School System'. Below the filters are links for 'Print This Attendance Warning', 'Print This Violation Warning', 'Print This Assessment Letter', and 'Print This Violations List'.

The original student will be displayed in the lower left. Use the search area in the upper right to search for the other student to merge.

**Merge Students**

Original Person

Name: Test Shanetta  
Address: 555 long st, Selma, AL 36701  
Age/Race/Gender: 7 year old White Female  
DOB: 102606

Select as primary contact: ☐

Selected For Merge

Name: Bobby Sue Jones  
Address: 205 Government Street, Mobile, AL 36541  
Age/Race/Gender: 24 year old White Female  
DOB: 1/2/2000

Select as primary contact: ☐

Cancel Merge

Search: shantetta

Click on the other student to be merged.

**Merge Students**

Original Person

Name: Test Shanetta  
Address: 555 long st, Selma, AL 36701  
Age/Race/Gender: 7 year old White Female  
DOB: 102606

Select as primary contact: ☐

Selected For Merge

Name: Test Shanetta  
Address: 123 king street, Selma, AL 36701  
Age/Race/Gender: 18 year old Black Female  
DOB: 2/15/2006

Select as primary contact: ☐

Cancel Merge

Search: shantetta

The second student to be merged will be displayed in the lower right. Choose which student should be the primary. Generally, the primary is the student with the most correct information in their contact information and demographic data (address, phone, email, race, gender, etc.).

**Merge Students**

Gorden, Shanetta C 1235 wood street  
18 year old Black Female DOB: 2/5/2006

Shanetta, Test 555 long st  
7 year old White Female DOB: 102606

Shanetta, Test 123 king street  
18 year old Black Female DOB: 2/15/2006

Original Person

Test Shanetta  
555 long st  
Selma, AI 36701  
7 year old White Female  
102606

Name  
Address  
Age/Race/Gender  
DOB

Selected For Merge

Test Shanetta  
123 king street  
Selma, AI 36701  
18 year old Black Female  
2/15/2006

Select as primary contact: ☐ ☒

Cancel Merge

Click the Merge button in the lower right.

**Merge People**

**Merge Students**

Gorden, Shanetta C 1235 wood street  
18 year old Black Female DOB: 2/5/2006

Shanetta, Test 555 long st  
7 year old White Female DOB: 102606

Shanetta, Test 123 king street  
18 year old Black Female DOB: 2/15/2006

Original Person

Test Shanetta  
555 long st  
Selma, AI 36701  
7 year old White Female  
102606

Name  
Address  
Age/Race/Gender  
DOB

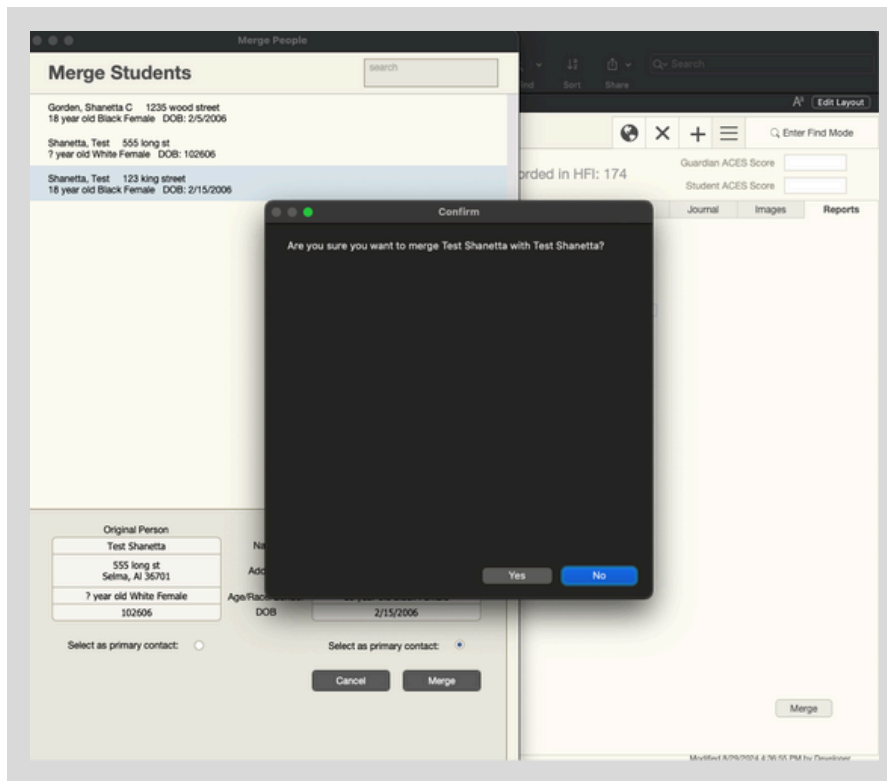
Selected For Merge

Test Shanetta  
123 king street  
Selma, AI 36701  
18 year old Black Female  
2/15/2006

Select as primary contact: ☐ ☒

Cancel Merge

You will be prompted to confirm the merge.



If everything is correct, click the “Yes” button. The system will merge all the contact and demographic information from the secondary student to the primary student. If there is information in a field in both the primary and secondary students, the information from the primary student will be used. If there is no information in a field for the primary student, but there is information in the field for the secondary student, the information will be copied from the secondary to the primary. It will also move all journal entries, school history, absences, and violations from the secondary student to the primary student.



# Web Portal

You can access the web portal from the solution by clicking on the world globe at the top of any screen displayed.

The screenshot shows a web portal interface for a case record. The header includes a 'Case Record' dropdown, a settings gear, and a navigation bar with '< > Corrie Ten Boom'. A red circle highlights a globe icon in the top right corner. Below the header, the left sidebar shows 'Corrie Ten Boom' case details: Case Status (NEW OFFENSE), Date Created (3/7/2024 9:13:13 AM), Created By (Mitzi Howard), Case Officer (Mitzi Howard), Date Assigned (May 15, 2024), Source (School Request), Referred By (Betty Barker), Reason Referred (Absences), Date Closed, Reason for Closure, Refresh Counts, and Attendance Count: 10. The main content area is titled 'NEW OFFENSE' and 'Days Recorded in HFI: 156'. It includes tabs for Student Info, School, Attendance/Violations, NCFAS-G, IIP, Journal, Images, and Reports. The Student Info tab is active, showing fields for First Name (Corrie), Middle Name (Ten), Last Name (Boom), Suffix, Circuit (13), State ID (13512352), Student ID, DOB/Age (6/20/2011, 12), Grade, Gender (Female), Race (Hispanic), Guardian (Jerry A Guard, 206 test street, Mobile, AL 36605), Email (corrie@gmail.com), Cell Phone (555-555-5555), Home Phone (555-502-5502), and Juvenile Court Status.

Our web portal may be accessed by this URL: [Information Referrals can be added when a formal case is not created.](#)

Juvenile Court personnel will be able to access our new web portal to change the status of all cases from “Pending” to “Closed” for Active Juvenile Status for students currently in the court system. All other students will change the status in Case Works to “New Offense” for Inactive or No Record students.

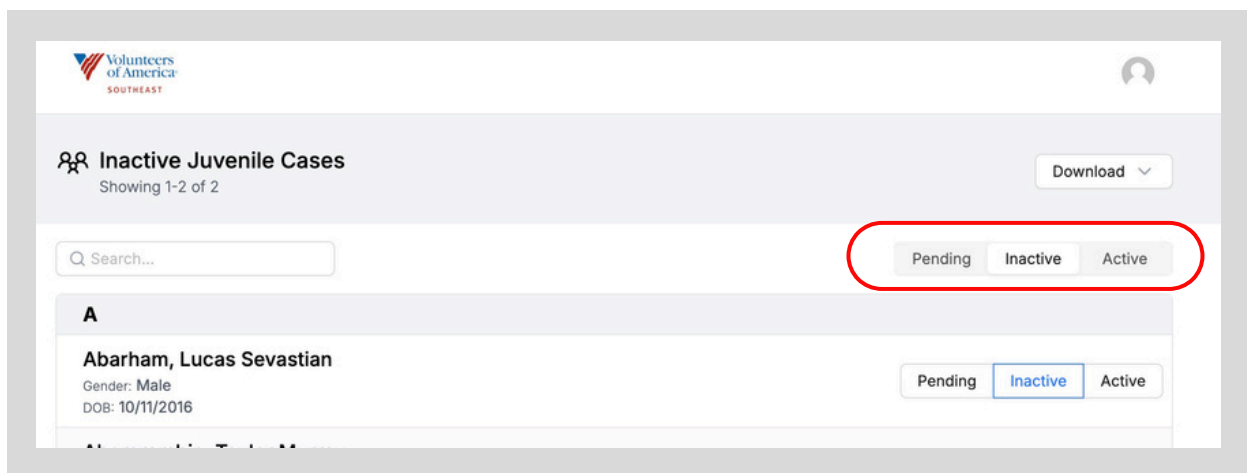
The screenshot shows a web browser window with the URL 'court.hfiAlabama.com/login?redirect=%2Fcases'. The page features the 'Volunteers of America Southeast' logo and the heading 'Sign into Helping Families Initiative'. Below the heading is a sign-in form with fields for 'Username' and 'Password', a blue 'Sign in' button, and a link for 'Forgot your password?'.

Though still in development at this User Guide printing, the portal will display the following: Pending, Inactive, No Record, and Active.

Juvenile Court personnel will only need to check each name against AOC or their current case management program to determine the Juvenile Court status of each student. Court personnel will click one of the choices and the student's data will be updated in the HFI solution.

All Users may access the list of students from their district so they can see who is Pending, Inactive, No Record, or Active.

By clicking on the tabs at the top, users will be able to see each list (if needed)



# Tools and Tips

Status in Juvenile Court Web Portal	Case Status in FRC Case Works	Definition	Action Taken by HFI
Pending	Pending	No Determination has been made as to the student's status in Juvenile Court.	
Inactive (The student is not active in the court system)	New Offense <sup>1</sup>	A determination has been made in juvenile court. The student is not under the supervision of the court and the student is eligible to participate in HFI.	<p>If 3 UA<sup>2</sup> and no behavior violations: Send Warning Letter to family in batch mode.</p> <p>If 4 UA and no Violations: Send assessment letter to the family in batch mode.<sup>3</sup></p> <p>If 7 UA active in HFI: Send request to retain email to Attendance Ofc Record remains Active in HFI.</p>

<sup>1</sup> The Case Management System automatically changes the status of the case from Pending to New Offense

<sup>2</sup> Three Unexcused Absences

<sup>3</sup> Four Unexcused Absences or 3 UA and behavior violation.

Status in Juvenile Court Web Portal	Case Status in FRC Case Works	Definition	Action Taken by HFI
			If 7 UA not active in HFI: Send Parent Notification; Send request to review email Attendance Ofc and close record.
			If 1st Violation not involving alcohol, drugs or weapons, send warning letter to family in batch mode.
			If 2nd Violation or if involving alcohol drugs or weapon: Send assessment letter from the case record.
			If both UA and Violations total < 3 incidents: Send both letters from the case record.

Status in Juvenile Court Web Portal	Case Status in FRC Case Works	Definition	Action Taken by HFI
			If both UA and Violations total >3: Send assessment letter from the case record.
No record	New Offense	There is no record of previous involvement with the Juvenile Court in the state	If 3 UA <sup>4</sup> and no behavior violations: Send Warning Letter to family in batch mode.
			If 4 UA: Send assessment letter to the family from the case record. <sup>5</sup>
			If 7 UA active in HFI: Send request to retain email Attendance Ofc Record remains Active in HFI.

<sup>4</sup> Three Unexcused Absences

<sup>5</sup> Four Unexcused Absences or 3 UA and behavior violation.

Status in Juvenile Court Web Portal	Case Status in FRC Case Works	Definition	Action Taken by HFI
			If 7 UA not active in HFI: Send Parent Notification; Send request to review email Attendance Ofc and close record.
			If 1st Violation not involving alcohol, drugs or weapons, send warning letter to family in batch mode.
			If 2nd Violation or if involving alcohol drugs or weapon: Send assessment letter from the case record.
			If both UA and Violations total < 3 incidents: Send both warning letters from the case record.

Status in Juvenile Court Web Portal	Case Status in FRC Case Works	Definition	Action Taken by HFI
			If both UA and Violations total >3: Send assessment letter from the case record.
Active (The student is active in the court system)	Closed <sup>6</sup>	A determination has been made in juvenile court. The student is under the supervision of the court and the student is NOT eligible to participate in HFI.	No action needed. The case is closed.
	In Progress	An assessment letter has been sent to the family.	Schedule family visit
	Active	The case is in the HFI process.	Family Assessment conducted; Intervention
			Plan Created; Interagency Team Meeting for family

<sup>6</sup> The Case Management System automatically changes the status of the case from to Closed

If the status in the Juvenile Court Web Portal is **Pending**, then no determination has been made.

If the status in the Juvenile Court Web Portal is **Inactive**, then the student is eligible for HFI.

If the status in the Juvenile Court Web Portal is **Active**, then the student is NOT eligible for HFI.

If the status in the Juvenile Court Web Portal is **No Record**, then the student is eligible for HFI.

### What is the definition of “In Progress”?

The HFI process has begun with Parent Notification through email or post.

### What is meant by the “Active” status?

The term “Active” has its usual meaning. The status is changed to active on the first response to the Parent Notification and remains active as long as the Case Officer is working on or monitoring the case. The Active status remains the same throughout the HFI process from Assessment, through NCFAS-G rating, IIP development and implementation, IAT review, monitoring, closure assessment and all the way to final closure review.

## FileMaker “Find” Function

The “Find” function can be accessed at the top right of your screen. Once you access the find, any field with a small magnifying glass can be used to isolate a request in your solution.

You may use the School Tab to look for Parents and/or Street Addresses to see who all is living at a single location.

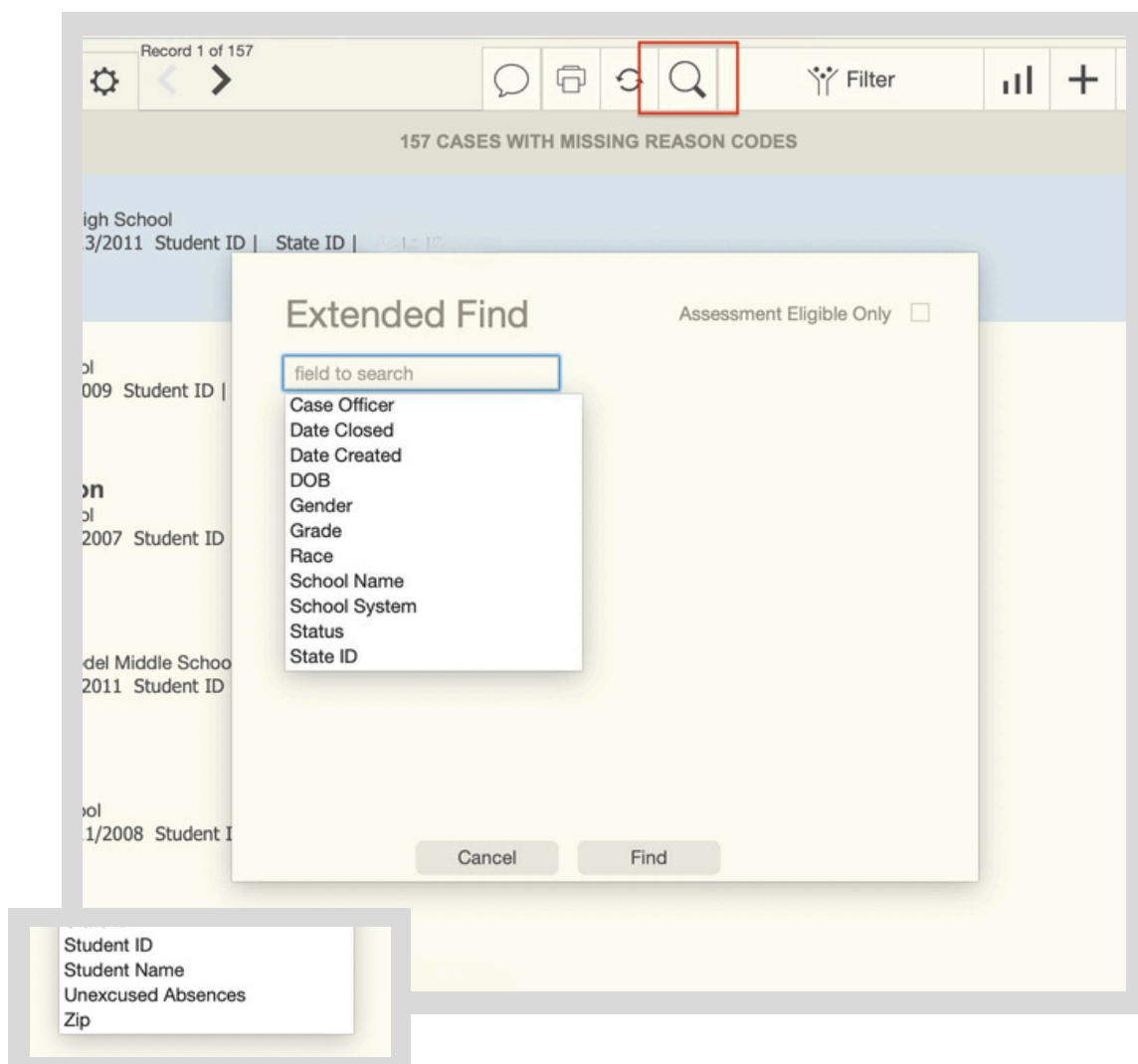
The screenshot displays the FileMaker Case Record interface. On the left, a sidebar contains a 'Case Status' dropdown menu with options: PENDING, NEW OFFENSE, IN PROGRESS, ACTIVE, and CLOSED. Below this are fields for 'Date Created', 'Created By', 'Case Officer', 'Date Assigned', 'Source', 'Referred By', 'Reason Referred', 'Date Closed', 'Reason for Closure', and a 'Refresh Counts' button. A 'CHECKLIST' section includes checkboxes for 'Attendance Warning Letter', 'Violation Warning Letter', 'Assessment Letter', and 'Petition Request to School', with a 'Show Entire List' link. The main area features a 'Days Recorded in HFI:' field and a 'Guardian ACES Score' field. Below these are tabs for 'Student Info', 'School', 'Attendance/Violations', 'NCFAS-G', 'IIP', 'Journal', 'Images', and 'Reports'. The 'Student Info' tab is active, showing fields for First Name, Middle Name, Last Name, Suffix, Circuit, State ID, Student ID, DOB/Age, Grade, Gender, Race, Guardian, City/State/Zip, Email, Cell Phone, Home Phone, and Juvenile Court Status. A 'Journal' section at the bottom allows for adding notes with fields for 'by', 'Type', 'Name', and 'Date'.



The below list are some of the functions that you can use to "FIND" records.

=	match whole (or match empty)	//	todays date
==	match entire field	?	invalid date or time
!	find duplicate values	@	any one character
<	less than	#	any one digit
≤	less than or equal	*	zero or more characters
>	greater than	""	match phrase (from word start)
≥	greater than or equal	*""	match phrase (from anywhere)
...	range	CMD-J	show all

A new extended search function has been added. To access it, click on the large magnifying glass icon on the list view. This will open a window from which you can choose the fields you want to search. There is a dropdown list of available fields.



Case Record

Record 1 of 354

Filter

search

354 CASES

Baker-Black, Jada Kadi

Phenix City Central High School

18 year old Black Male DOB | 6/27/2006 Student ID | State ID |

Melinda Winters

NEW OFFENSE

Most Recent Absence Date: 10/15/2024

Most Recent Infraction Date: 9/23/2024

Huggins, Jazmine Anderson

Phenix City Phenix City Intermediate School

13 year old White/Hispanic Male DOB | 1/28/2011 S

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Munn, Jazmine

Phenix City Meadowlark Elementary School

6 year old Black Female DOB | 1/16/2018 Student I

Florence Bellamy

NEW OFFENSE

Most Recent Absence Date: 10/25/2024

Sheffield, Jazmine

Phenix City Phenix City Elementary School

8 year old Black Female DOB | 10/13/2016 Student

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Robinson-Butler, Jazmine

Phenix City Phenix City Elementary School

7 year old Black Female DOB | 11/17/2016 Student

NEW OFFENSE

Most Recent Absence Date: 10/18/2024

Thomas, Jazmine

Phenix City Phenix City Elementary School

7 year old Black Female DOB | 8/7/2017 Student ID | State ID |

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Doleman, Kayson Quincy

Phenix City Ridgecrest Elementary School

10 year old Black Male DOB | 2/21/2014 Student ID | State ID |

NEW OFFENSE

Most Recent Absence Date: 9/23/2024

Extended Find

School System

Phenix City

field to search

Russell County

Cancel

Find

search field

Case Record

Record 1 of 354

Filter

search

354 CASES

Baker-Black, Jada Kadi

Phenix City Central High School

18 year old Black Male DOB | 6/27/2006 Student ID | State ID |

Melinda Winters

NEW OFFENSE

Most Recent Absence Date: 10/15/2024

Most Recent Infraction Date: 9/23/2024

Huggins, Jazmine Anderson

Phenix City Phenix City Intermediate School

13 year old White/Hispanic Male DOB | 1/28/2011 S

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Munn, Jazmine

Phenix City Meadowlark Elementary School

6 year old Black Female DOB | 1/16/2018 Student I

Florence Bellamy

NEW OFFENSE

Most Recent Absence Date: 10/25/2024

Sheffield, Jazmine

Phenix City Phenix City elementary School

8 year old Black Female DOB | 10/13/2016 Student

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Robinson-Butler, Jazmine

Phenix City Phenix City elementary School

7 year old Black Female DOB | 11/17/2016 Student

NEW OFFENSE

Most Recent Absence Date: 10/18/2024

Thomas, Jazmine

Phenix City Phenix City Elementary School

7 year old Black Female DOB | 8/7/2017 Student ID | State ID |

NEW OFFENSE

Most Recent Absence Date: 10/23/2024

Doleman, Kayson Quincy

Phenix City Ridgecrest Elementary School

10 year old Black Male DOB | 2/21/2014 Student ID | State ID |

NEW OFFENSE

Most Recent Absence Date: 9/23/2024

Extended Find

School System

Russell County

Date Closed

09/01/2024\_09/30/2024

field to search

Cancel

Find

search field

74

Extended Find

Case Officer

Grady Lacher

Date Closed

10/1/24...10/31/24

Gender

Female

field to search

Case Officer

Date Closed

Date Created

DOB

Gender

Grade

Race

School Name

School System

Cancel

Find

## SIR Code Categories

Alcohol/Drugs/Tobacco/Vape	Local Use	SIR	S99	✓
Alcohol/Drugs/Tobacco/Vape	Alcohol Possession	SIR	S01	✓
Alcohol/Drugs/Tobacco/Vape	Alcohol Sale	SIR	S02	✓
Alcohol/Drugs/Tobacco/Vape	Alcohol Use	SIR	S03	✓
Alcohol/Drugs/Tobacco/Vape	Drugs, Possession	SIR	S13	✓
Alcohol/Drugs/Tobacco/Vape	Drugs, Sale	SIR	S14	✓
Alcohol/Drugs/Tobacco/Vape	Drugs, Use	SIR	S15	✓
Alcohol/Drugs/Tobacco/Vape	Tobacco, Possession	SIR	S32	✓
Alcohol/Drugs/Tobacco/Vape	Tobacco, Sale	SIR	S33	✓
Alcohol/Drugs/Tobacco/Vape	Tobacco, Use	SIR	S34	✓
Alcohol/Drugs/Tobacco/Vape	Vape/Vapor, Possession	SIR	S60	✓
Alcohol/Drugs/Tobacco/Vape	Vape/Vapor, Usage	SIR	S61	✓
Alcohol/Drugs/Tobacco/Vape	Vape/Vapor, Sale	SIR	S62	✓
Alcohol/Drugs/Tobacco/Vape	E-Cigarettes, Possession	SIR	S63	✓
Alcohol/Drugs/Tobacco/Vape	E-Cigarettes, Usage	SIR	S64	✓
Alcohol/Drugs/Tobacco/Vape	E-Cigarettes, Sale	SIR	S65	✓
15				
Interpersonal Violence	Assault	SIR	S05	✓
Interpersonal Violence	Fighting	SIR	S17	✓
Interpersonal Violence	Harassment	SIR	S20	✓
Interpersonal Violence	Homicide	SIR	S21	✓
Interpersonal Violence	Inciting a Disturbance	SIR	S22	✓
Interpersonal Violence	Kidnapping	SIR	S23	✓
Interpersonal Violence	Robbery	SIR	S27	✓
Interpersonal Violence	Sexual Battery	SIR	S28	✓
Interpersonal Violence	Sexual Harassment	SIR	S29	✓
Interpersonal Violence	Sexual Offenses, Other	SIR	S30	✓
Interpersonal Violence	Threat/Intimidation	SIR	S31	✓
12				
Non-Violent Offense	Arson	SIR	S04	✓
Non-Violent Offense	Bomb Threat	SIR	S06	✓
Non-Violent Offense	Burglary	SIR	S07	✓
Non-Violent Offense	Criminal Mischief	SIR	S08	✓
Non-Violent Offense	Defiance	SIR	S09	✓
Non-Violent Offense	Disobedience	SIR	S10	✓
Non-Violent Offense	Disorderly Conduct	SIR	S11	✓
Non-Violent Offense	Disruptive	SIR	S12	✓
Non-Violent Offense	Unauthorized Communication Device	SIR	S16	✓

Non-Violent Offense	Fire Alarm Abuse/Tampering	SIR	S18	✓
Non-Violent Offense	Gambling	SIR	S19	✓
Non-Violent Offense	Theft/Larceny	SIR	S24	✓
Non-Violent Offense	Theft/Motor Vehicle	SIR	S25	✓
Non-Violent Offense	Profanity/Vulgarity	SIR	S26	✓
Non-Violent Offense	Trespassing	SIR	S35	✓
Non-Violent Offense	Unauthorized Absence	SIR	S36	✓
Non-Violent Offense	Other Incident	SIR	S58	✓
Non-Violent Offense	Technology, Inappropriate Use	SIR	S59	✓
18				
Weapons	Handgun, Possession	SIR	S37	✓
Weapons	Handgun, Sale	SIR	S38	✓
Weapons	Handgun, Use	SIR	S39	✓
Weapons	Rifle/Shotgun, Possession	SIR	S40	✓
Weapons	Rifle/Shotgun, Sale	SIR	S41	✓
Weapons	Rifle/Shotgun, Use	SIR	S42	✓
Weapons	Firearm Component, Possession	SIR	S43	✓
Weapons	Firearm Component, Sale	SIR	S44	✓
Weapons	Firearm Component, Use	SIR	S45	✓
Weapons	Explosive/Poison Gas, Possession	SIR	S46	✓
Weapons	Explosive/Poison Gas, Sale	SIR	S47	✓
Weapons	Explosive/Poison Gas, Use	SIR	S48	✓
Weapons	Other Weapon, Possession	SIR	S49	✓
Weapons	Other Weapon, Sale	SIR	S50	✓
Weapons	Other Weapon, Use	SIR	S51	✓
Weapons	Knife, Possession	SIR	S52	✓
Weapons	Knife, Sale	SIR	S53	✓
Weapons	Knife, Use	SIR	S54	✓
Weapons	Other/Unknown Weapon, Possession	SIR	S55	✓
Weapons	Other/Unknown Weapon, Sale	SIR	S56	✓
Weapons	Other/Unknown Weapon, Use	SIR	S57	✓
21				