

HELPING FAMILIES INITIATIVE USER GUIDE



HELPING FAMILIES INITIATIVE

Making Alabama's Education Laws Benefit Everyone



HELPING FAMILIES INITIATIVE USER GUIDE

Revision History

Current version

5/21/2026

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!**

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The HFI Process

The HFI process begins when a student is referred to the HFI/DA Office either through the case management system or by direct referral. In the case management system, this is coded as “new offense”.

If the “new offense” involves unexcused absences, a warning letter, email, and/or text message is sent to the parent/guardian. While each circuit sets its own threshold for unexcused absences that trigger a new offense based on unexcused absences, early intervention remains the most effective approach. After the warning is sent, the case status is then updated from “new offense” to “closed.” In some cases, if an immediate need is identified, the case may be moved to the assessment / “in progress” stage rather than being closed.

If the “new offense” involves discipline violations, a warning letter, email, and/or text message is sent to the parent/guardian. The case status is then updated from “new offense” to “closed.” In some cases, if an immediate need is identified, the case may be moved to the assessment / “in progress” stage rather than being closed.

If unexcused absences and/or discipline violations continue after the warning, an “assessment letter” is sent inviting the parent/guardian and student to meet. At this point, the case status is changed from “closed” or “new offense” to “in progress.”

If the parent/guardian declines the assessment meeting, the case status is updated from “in progress” to “closed.” If the parent/guardian agrees to meet, the case status is changed from “in progress” to “active.”

Once the case is “active”, referrals for immediate needs may begin. The case officer should conduct interviews and/or home visits with the family and the initial North Carolina Family Assessment (NCFAS) is completed. Three priority areas for intervention are identified.

An Individual Intervention Plan (IIP) is then developed for the student and family, with referrals coordinated through the Interagency Team (IAT). The case officer provides the family with the IIP and all relevant referral information and continues to monitor progress through “follow-up” communication to ensure services are being utilized.

If the student and/or family demonstrate sufficient improvement, the case officer completes a “closure” NCFAS, and the case status is updated from “active” to “closed.”

If insufficient progress is made, the case officer completes a “reassessment” NCFAS. The case is then returned to the IAT to revise the IIP and referral plan, and monitoring by the case officer continues.

The HFI Process

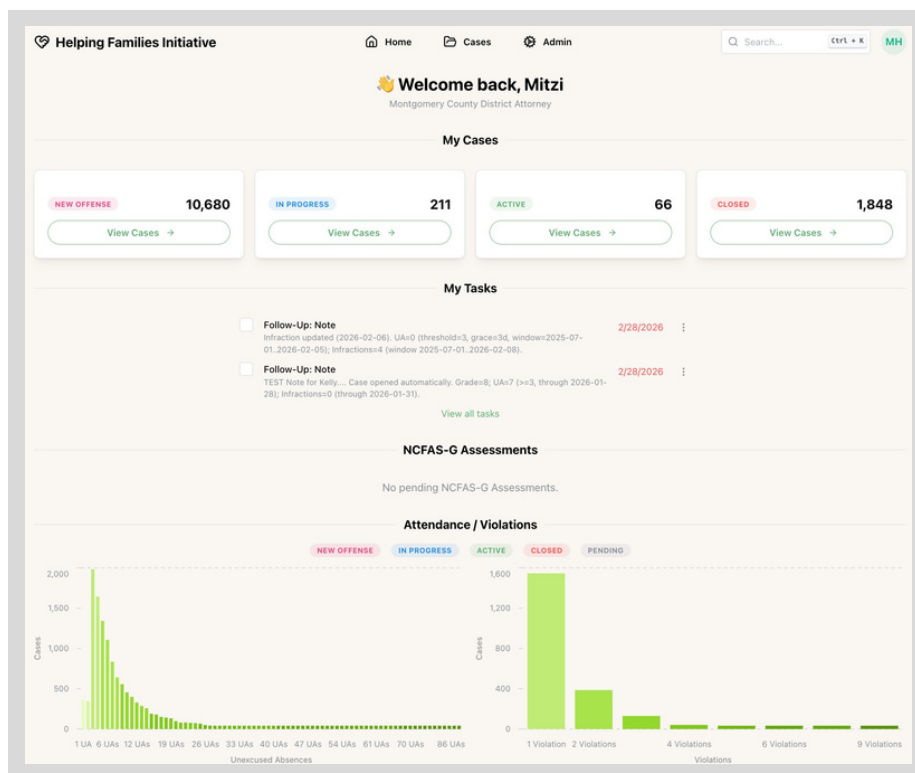


Home

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.

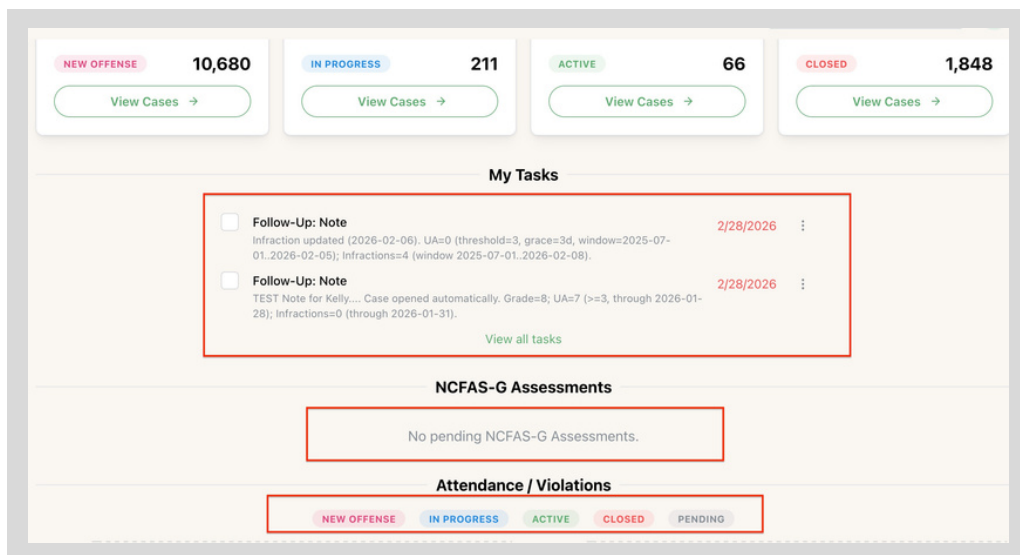
Each case is assigned a status of New Offense when it enters the system. Dashboards will update in real time.



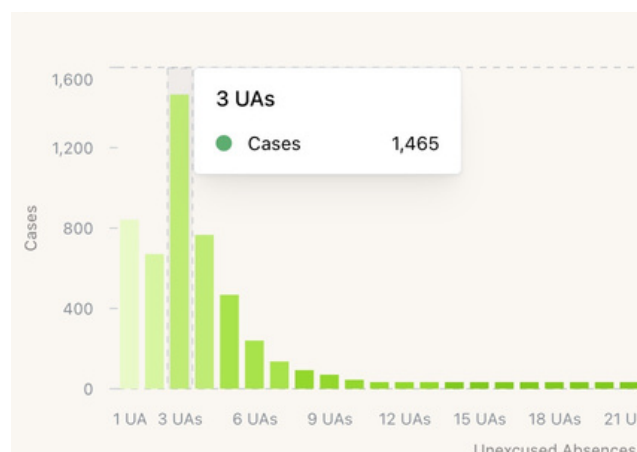
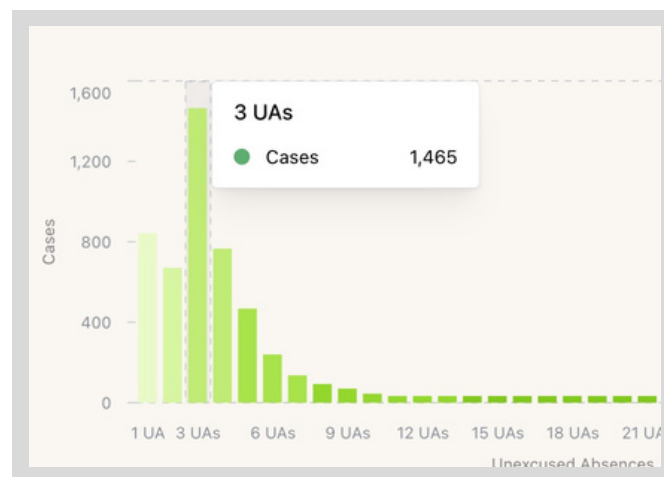
My Tasks for follow up messages will display Case Notes that need to be readdressed at a later date for each case officer.

If the case officer has partially completed a NCFAS-G, the system will alert you of incomplete assessments.

You may also filter the Attendance/Violations bar charts based on different status of cases.

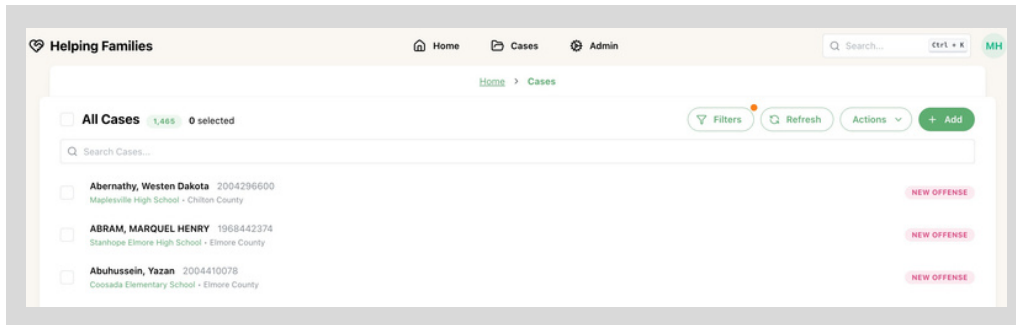


Hovering over the green bar graph will display the number of cases in that category. A list of cases based on the green bar will display once the green bar is clicked.



Case List View

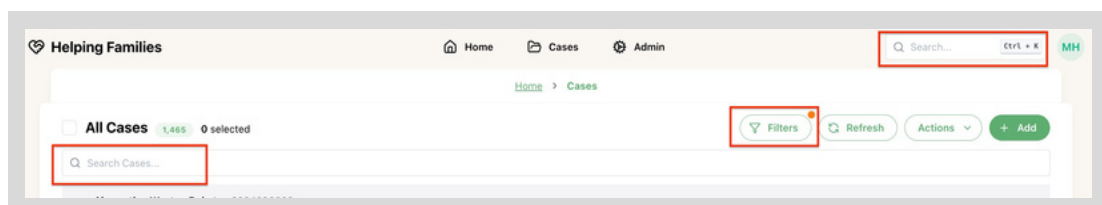
A list of cases will show up for the Unexcused Absence count you chose. The list of cases can be filtered or letters printed from the application at this point.



The Case List view will allow you to choose several options for searching and printing letters. The “Search Cases” bar will allow you to narrow quickly down to one student in your list.

The “Search” at the top right will search across all students in your district.

To use “Filters” will narrow your search even more based on a school and other criteria.

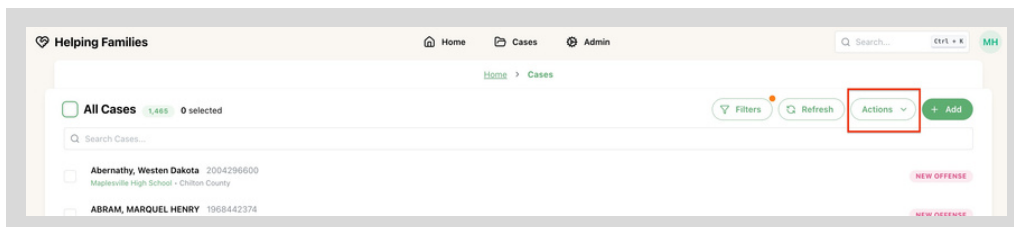


Clicking the “Filters” button will display multiple filters you can use to narrow your search in the application.

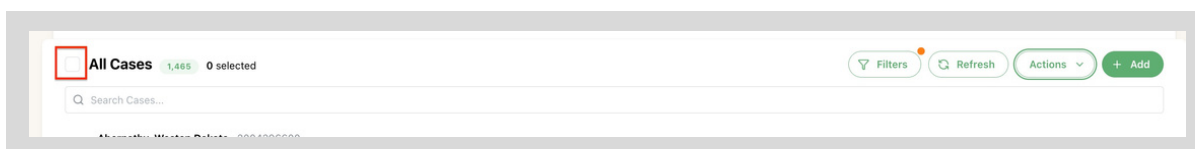
A screenshot of the 'Advanced Filters' dialog box. The dialog is titled 'Advanced Filters' and has a close button in the top right corner. It is divided into two sections: 'Case Filters' and 'Student Filters'. Under 'Case Filters', there are dropdown menus for 'Case Worker' and 'Status', and input fields for 'Date Created' and 'Date Closed'. Under 'Student Filters', there are input fields for 'Date of Birth', 'Age', 'Gender', 'Grade', 'Race', 'School System', 'School', and 'Zip Code'. Each dropdown menu has a small arrow icon next to it.

Actions

The “Actions” button is where you will choose whether to send a letter, email or text to your families.

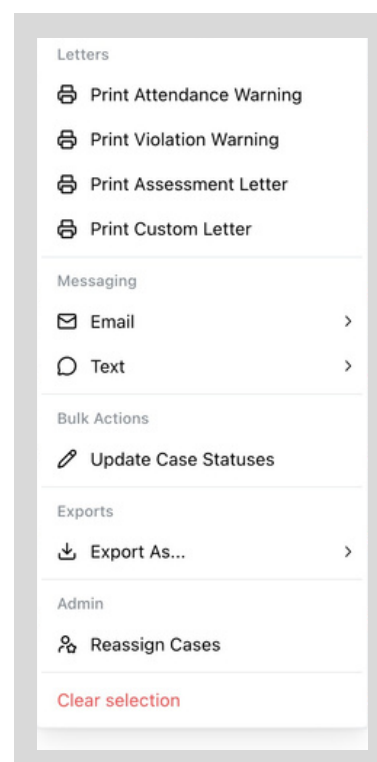


To batch print letters, send emails and/or text to ALL students in a list of cases, click the “All Cases” button. Once that is chosen, go back to the “Actions” button and choose which method you plan to use for contacting parents.



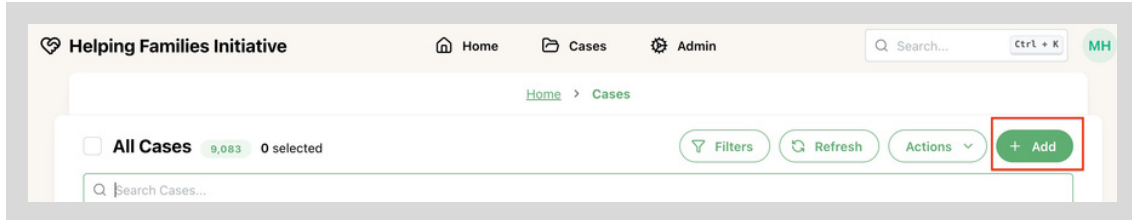
All letters, emails and texts can be sent from the system. Team Leaders can update the Case status for a group of students and a list of students can be exported to send to Attendance officers.

Team Leaders will be able to reassign cases from this area as well.



Adding a Case

If you don't find a student in the application, you can create a case with the information you have available.



Once you hit the “+” button, begin completing your information.

A screenshot of the 'Create Case' form. The form has a title 'Create Case' and a close button (X). It contains several input fields: 'Student State ID' (with a note 'If unknown, enter a random 10-digit identifier'), 'First Name', 'Middle Name', 'Last Name', and 'School' (a dropdown menu). At the bottom, there are 'Cancel' and 'Create Case' buttons.

If the student number is unknown, create a mock Student State ID until the student's number is found. We suggest using your circuit number, case officer initials, “00” and 4 more digits.

A screenshot of the 'Create Case' form with example data filled in. The 'Student State ID' field contains '019MH001234'. The 'First Name' field contains 'Mitzi', the 'Middle Name' field contains 'Test', and the 'Last Name' field contains 'Case'. The 'School' dropdown menu is set to 'Abrams Elementary School'. The 'Create Case' button is now green.

Once the student has been added, Guardians can be added.

Mitzi Test Case
019MH001234 Abrams Elementary School

Assigned To: Select... Edit

Status: IN PROGRESS

Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Guardians + Add

Name	Phone	Email	Address
Jane Case Mother	(205) 837-1318	mitzi@mossrock.com	ADDRESS LOCKED

Case Detail Overview

A student's overview will provide multiple data points for a case officer to review.

1773074925184 Prattville Elementary School

Assigned To: Select... Edit

Status: CLOSED

Reason for Closure: Administrative error

Actions Edit

Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Student Info

Name: Test Case #1

State ID Number: 1773074925184

DOB: Age: Grade: Gender: Race:

Guardian Contact Info

Primary Guardian: Test Guardian #1

Primary Guardian Email:

Journal Show system notes Print + Add

- NC Nicolas Cheatwood - 4/15/2026 12:44 PM: Nicolas Cheatwood changed case status from "In Progress" to "Closed".
- NC Nicolas Cheatwood - 4/15/2026 12:44 PM: Testing bulk close cases -NC
- NC Nicolas Cheatwood - 4/15/2026 12:43 PM: Nicolas Cheatwood changed case status from Closed to In Progress.
- NC Nicolas Cheatwood - 4/15/2026 12:43 PM:

Case officers will be able to send a letter, email or text for individual students.

EA: 2 INF: 1

Assigned To: MS Myesha Snow

Status: CLOSED

Reason for Closure: Select...

Actions Edit

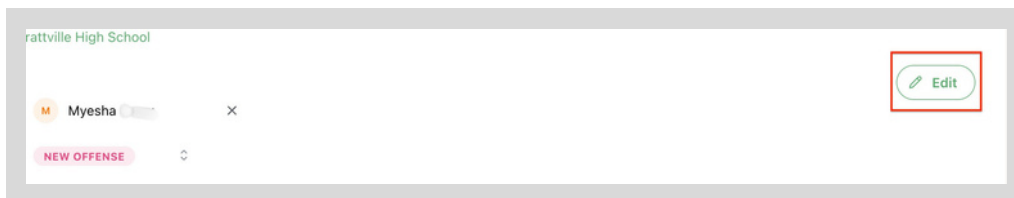
Letters

- Print
- Email
- Text

Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Journal Show system notes

- MS Myesha Snow - 3/31/2026 1:21 PM: Myesha Snow changed status from

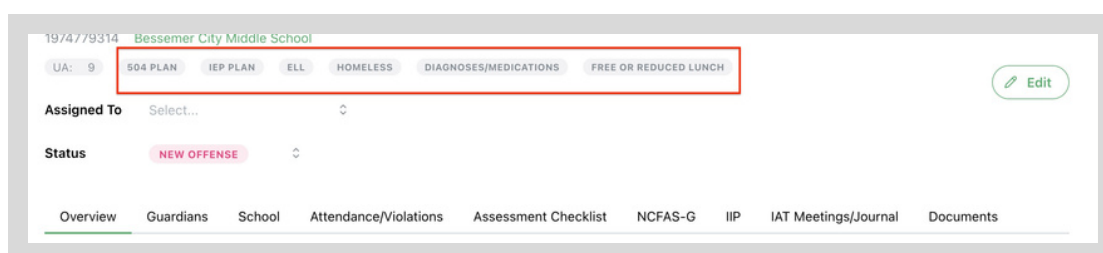


In addition, you may edit the “flags” for each student so that they display on their Overview. If the student or parent is in Active Status, their case will be closed for HFI.

 A screenshot of the 'Edit Student' modal window. The 'Flags' tab is selected and highlighted with a red box. The modal contains three columns of checkboxes: 'Student' (504 Plan, IEP Plan, ELL, Homeless), 'Contact' (Diagnoses/Medication, Honor Roll, Free or Reduced Lunch), and 'Retained' (Active Juvenile Status, Active Guardian Prosecution). The 'Save' button is green and the 'Cancel' button is white.

 A screenshot of the 'Edit Student' modal window, showing the 'Flags' tab. In this view, the checkboxes for '504 Plan', 'IEP Plan', 'ELL', 'Homeless', 'Diagnoses/Medication', 'Honor Roll', and 'Free or Reduced Lunch' are all checked with green checkmarks. The 'Active Juvenile Status' and 'Active Guardian Prosecution' checkboxes remain unchecked. The 'Save' button is green and the 'Cancel' button is white.

Flags chosen will display on the Overview tab for a student.



If Active Juvenile Status or Active Guardian Prosecution are chosen, the case will close automatically unless someone changes the status manually.

Journal Notes

If Active Juvenile Status or Active Guardian Prosecution are chosen, the case will close automatically unless someone changes the status manually.

Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Name
Mitzi Test Case

State ID Number
019MH001234

Journal

Print + Add

Once clicked, you can add a case note, change the date of your note and choose a tag to document for reporting. All case notes need a tag for accurate reporting.

Note

Date *
03/11/2026 09:14 AM

Note *
After a phone call with mom, I met with the family today at their home to discuss the NCFAS-G Assessment.

Tags *
Please provide one or more note type.
Case Note X Home Visit X Phone Call X
Select...

Cancel Save

To create a follow up date or copy a note, you click the three dots to open this menu.

Actions Edit

ndance/Violations Assessment Checklist NCFAS-

Journal

Show system notes Export Delete

MH Mitzi Howard • 5/22/2026 3:43 PM
Test Note....

CASE NOTE

Create Follow-Up
Copy
Print
Delete

Clicking on “Create Follow Up” allows you to set a date and topic for all follow ups. Follow ups are recommended for every note.

Create Task

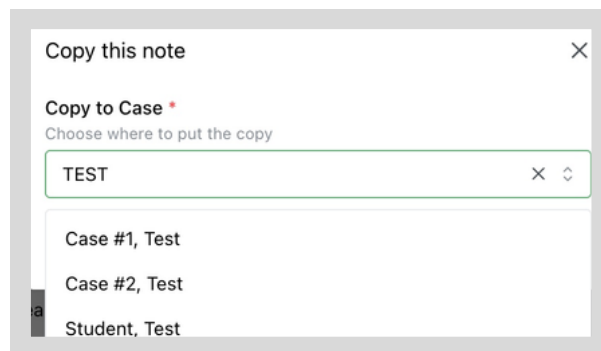
Title *
Follow-Up: Note

Due Date

Description
Test Note....

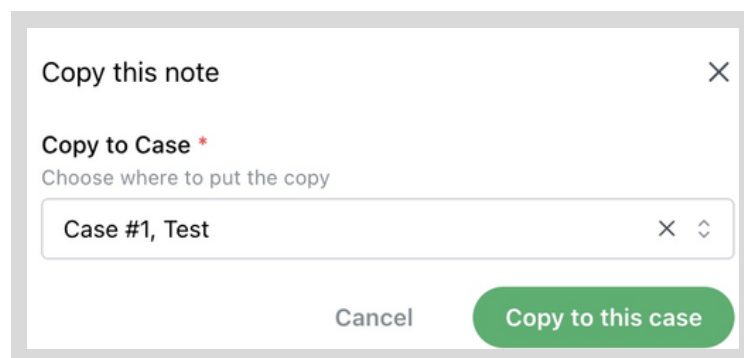
Cancel Save

Clicking on the “Copy” button, will allow you to copy a note to one or more students. Each student must be chosen individually.

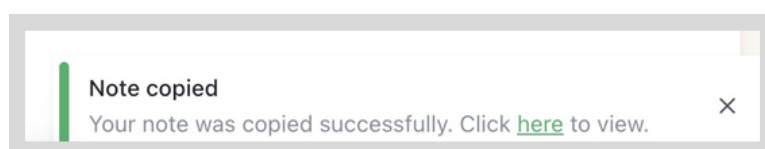


Only one case at a time can be chosen, but the note can be copied to another student's case file.

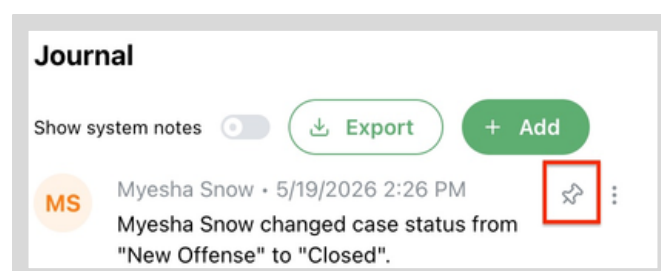
To copy to another student, simply open the three dots again, choose “Copy” and you can choose another student who will receive a copy of the note.



Once the note is copied, a dialog will display at the bottom of the screen which will take you to the case that received the copy.

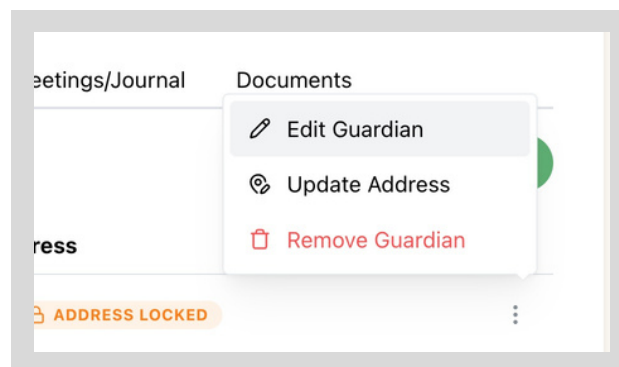
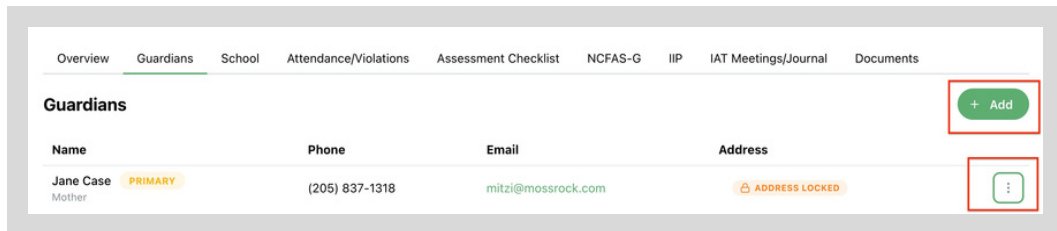


If a note is critical to a case and you want it to ALWAYS populate to the top of your list of notes, click the “pin” icon and the note will display first.



Guardian

Guardians are provided by ALSDE, but if you have additional information, you can edit and/or add a guardian.



Editing a guardian, allows you to set the primary guardian and also to lock the address of the family.

Edit Guardian [X]

First name *
Jane

Last name *
Case

Phone
+12058371318

Email
mitzi@mossrock.com

Relationship
Mother

☒ **Primary Guardian**

☒ **Address Locked**
Prevents ALSDE edits to this address

Cancel Save

School

The School tab will display a student's school history.

Status IN PROGRESS

Overview Guardians **School** Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

School	Start Date	End Date
Abrams Elementary School Bessemer City	3/5/2026	

Attendance/Violations

The Attendance/Violations tab provides a detailed attendance and behavior infraction history, as well as correspondence sent to a family.

Overview Guardians School **Attendance/Violations** Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Attendance (9) Infractions (0) Truancy (0) Correspondence (1) History (0)

Code	Date	School	Unexcused?
UA	1/14/2026	Bessemer City Middle School Bessemer City	UNEXCUSED
UA	12/19/2025	Bessemer City Middle School Bessemer City	UNEXCUSED
UA	12/4/2025	Bessemer City Middle School Bessemer City	UNEXCUSED
UA	10/30/2025	Bessemer City Middle School Bessemer City	UNEXCUSED
UA	10/27/2025	Bessemer City Middle School Bessemer City	UNEXCUSED
UA	10/23/2025	Bessemer City Middle School Bessemer City	UNEXCUSED

You can choose the academic year and be able to print a list of absences and/or violations.

A screenshot of a web interface showing a dropdown menu for 'Academic Year' with a 'Select...' placeholder and a 'Print' button next to it. The dropdown is highlighted with a red rectangle.

The date and time the correspondence is sent displays. If you need to reprint a letter, go to the Documents area.

Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents			
Attendance (9) Infractions (0) Truancy (0) Correspondence (1) History (0)			
Correspondence Date	Action	Type	Sender
3/5/2026, 2:14:47 PM	Print	Assessment Letter	MH Mitzi Howard

Assessment Checklist

The Assessment Checklist will help make sure all items for a case are completed.

A screenshot of the 'Assessment Checklist' tab in the software. It contains two columns of checkboxes for various assessment items. The 'Assessment Checklist' tab is highlighted with a green border.

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

NCFAS-G

NCFAS-G tab present the Overview and all Assessment choices. An Intake Assessment will be the place to start.

A screenshot of the 'NCFAS-G' tab, specifically the 'Overview' section. The 'NCFAS-G' tab is highlighted with a red border. The left sidebar shows a menu with 'Overview', 'Intake', 'Reassessment', 'Closure', and 'History'. The main content area shows a table with columns for 'Subdomain', 'Intake', 'Reassessment', 'Closure', and 'Change'.

Subdomain	Intake	Reassessment	Closure	Change
Housing Stability				
Safety in the Community				
Environmental Risks				
Habitability of Housing				

Choose “Intake” and press the “Add” button to begin an assessment.

This screenshot shows the 'Intake' assessment form. The top navigation bar includes 'Overview', 'Guardians', 'School', 'Attendance/Violations', 'Assessment Checklist', 'NCFAS-G', 'IIP', 'IAT Meetings/Journal', and 'Documents'. On the left, a sidebar lists 'Overview', 'Intake' (highlighted with a green box), 'Reassessment', and 'Closure'. The main content area is titled 'Intake' and features a red-bordered '+ Add' button. Below the title, there are expandable sections for 'Environment' and 'Parental Capabilities'.

This screenshot displays the 'Environment' subdomain assessment form. At the top, a progress bar shows steps from 'Get Started' to 'Review & Submit', with 'Environment' being the current step. The 'Environment' section has a score of 0 and a 'Set All Scores' link. Below this, five subdomains are listed: 'Housing Stability', 'Safety in the Community', 'Environmental Risks', 'Habitability of Housing', and 'Learning Environment'. Each subdomain has a score of 0 and a 'Set All Scores' link. The scores are displayed as radio buttons with labels: N/A, +2, +1, 0, -1, -2, -3, and UK.

All scores on a subdomain can be set.

This screenshot shows a dialog box for setting all scores. It features a 'Set All Scores' button at the top. Below the button, there is a row of radio buttons with labels: N/A, +2, +1, 0, -1, -2, -3, and UK. An 'Apply' button is located to the right of the radio buttons, and a 'Clear Scores' button is to the right of the 'Apply' button.

Clicking the “i” icon next to each domain and subdomain will display an explanation of how to score each domain.

This screenshot shows the 'Environment' domain header. The word 'Environment' is displayed in a large font, and a green circle containing an 'i' icon is positioned to its right.

This screenshot displays the 'Score Definitions' modal for the 'Environment' domain. The modal has a title bar with a close button. The content is organized into three sections: 'Clear Strength', 'Baseline/Adequate', and 'Serious Challenge'. Each section provides a detailed explanation of what the score represents in terms of family functioning and challenges.

Score Definitions

Environment

Clear Strength

Refers to family receiving very high ratings in the following areas: housing stability, safety in the community, environmental risks, housing habitability, and learning environment.

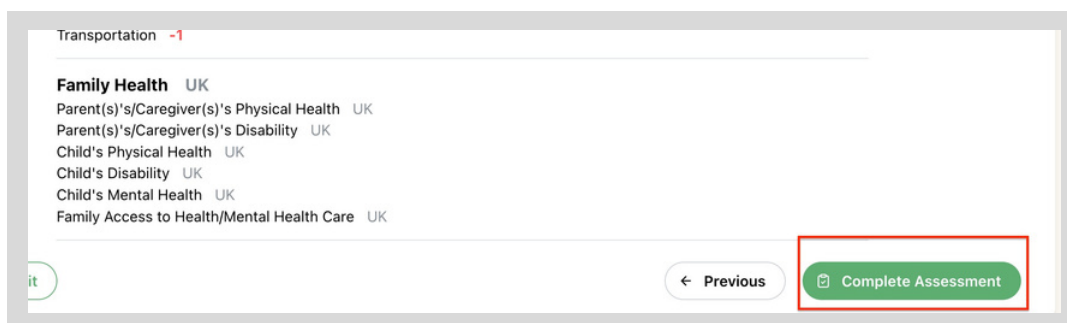
Baseline/Adequate

Refers to family experiencing a few minimal issues in the following areas: housing stability, safety in the community, environmental risks, housing habitability, and learning environment. However, issues do not interfere in family's ability to function, and issues do not need to be addressed. Some minimal challenges may be due to or made worse by poverty-related issues rather than skill or attitude of caregivers.

Serious Challenge

Refers to family receiving very low ratings in the following areas: housing stability, safety in the community, environmental risks, housing habitability, and learning environment.

Once all domains and subdomains have been completed, choose “Review and Submit” to see all scores before you cursor to the bottom of the screen and choose “Complete Assessment.”



Transportation -1

Family Health UK

Parent(s)'s/Caregiver(s)'s Physical Health UK

Parent(s)'s/Caregiver(s)'s Disability UK

Child's Physical Health UK

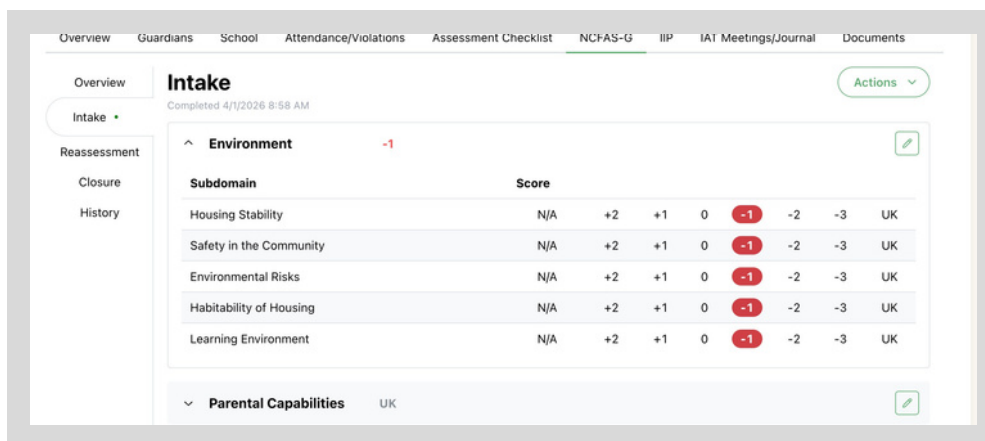
Child's Disability UK

Child's Mental Health UK

Family Access to Health/Mental Health Care UK

Previous Complete Assessment

Once completed, the scores for the domains will be displayed on your screen in the Intake area. The green dot next to Intake indicates an assessment has been completed. You can also review the scores in the Overview.



Overview Guardians School Attendance/Violations Assessment Checklist NCFAS-G IIP IAT Meetings/Journal Documents

Overview Intake Reassessment Closure History

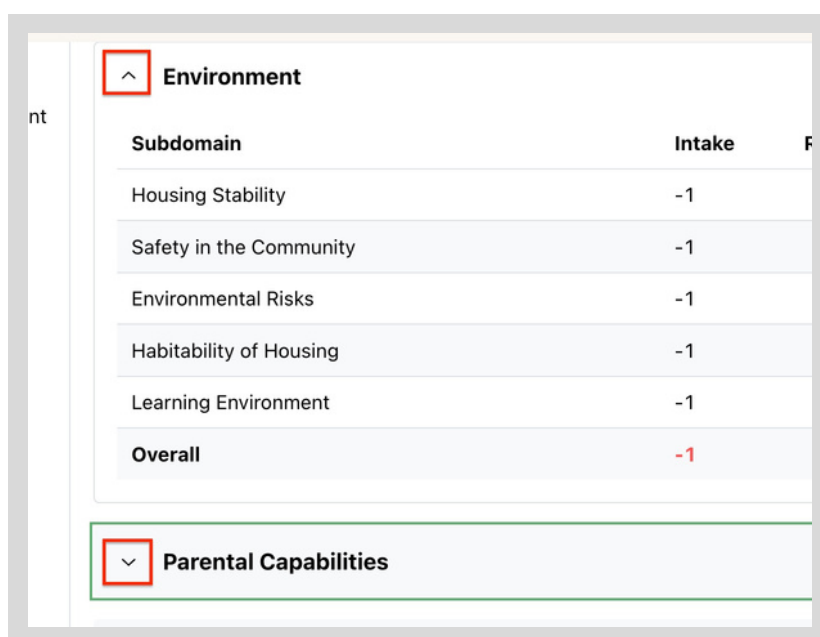
Intake Completed 4/1/2026 8:58 AM

Environment -1

Subdomain	Score							
Housing Stability	N/A	+2	+1	0	-1	-2	-3	UK
Safety in the Community	N/A	+2	+1	0	-1	-2	-3	UK
Environmental Risks	N/A	+2	+1	0	-1	-2	-3	UK
Habitability of Housing	N/A	+2	+1	0	-1	-2	-3	UK
Learning Environment	N/A	+2	+1	0	-1	-2	-3	UK

Parental Capabilities UK

The up and down carats will allow you to view each subdomain and its scores.



Environment

Subdomain	Intake	
Housing Stability	-1	
Safety in the Community	-1	
Environmental Risks	-1	
Habitability of Housing	-1	
Learning Environment	-1	
Overall	-1	

Parental Capabilities

IIP

To create the IIP, choose the add button and, for completed NCFAS-G assessments, choose from the “catalog” of domains and subdomains.

A custom goal can also be created if needed.

The screenshot shows the 'Goals' section of the IIP management interface. At the top, there are tabs for Overview, Guardians, School, Attendance/Violations, Assessment Checklist, NCFAS-G, IIP, IAT Meetings/Journal, and Documents. Below these is a sub-header with 'Goals', 'Referrals', and 'Notes' tabs. The main content area has a table with columns: Goal, Referral, Date Referred, Follow-up Date, and Services Provided. On the right side, there are two buttons: 'Print' and '+ Add'. The '+ Add' button is highlighted with a red box, and a dropdown menu is open below it, showing 'From Catalog...' (highlighted with a red box) and 'Custom'.

Choose a subdomain to create the Goal.

The screenshot shows a 'Select a Goal' dialog box. It contains a table with three rows of goals, each with a description, an NCFAS Score, and a 'Select' button. The 'Select' button for the first row is highlighted with a red box.

Goal	NCFAS Score	Action
A. Environment - Housing Stability Present housing is not threatened.	-1	Select →
A. Environment - Safety in the Community Disturbances do not deter spending time outside.	-1	Select →
A. Environment - Habitability of Housing Minimal problems in the home.	-1	Select →

Once selected, a referral to one of the Community Service organizations can be added.

The screenshot shows the 'Goals' section of the IIP management interface. The table now has a row with the goal 'Present housing is not threatened.' and a 'Referral' column containing a '+ Create' button, which is highlighted with a red box. The table also has columns for Date Referred, Follow-up Date, Services Provided, and Utilization.

Creating a referral, allows for multiple services provided by a single organization. A drop down of the circuit’s Community Service organizations is provided. It is important for reporting purposes to include who the service is for, the referral date, a follow date, etc.

The screenshot shows a 'Referral' form. It includes fields for 'Services Provided' (a list of services with 'Adult Mental Health Services', 'Child Care/After School', and 'Children's Services' selected), 'Referral Agency' (a dropdown menu with 'MCDA HFI Community Resource List' selected), 'Date Referred' (a date field with '04/01/2026'), 'Follow Up Date' (a date field), 'Utilized?' (radio buttons for 'Yes', 'No', 'Unknown', and 'Referral' which is selected), and 'Referral For' (radio buttons for 'Family', 'Guardian', 'Student', and 'None' which is selected). At the bottom, there are 'Cancel' and 'Save' buttons.

Once Goals are chosen, create Referrals and set Follow Up dates to confirm use of the Referral.

The screenshot shows the 'Goals' tab of the Individual Intervention Plan (IIP) management system. The top navigation bar includes 'Overview', 'Guardians', 'School', 'Attendance/Violations', 'Assessment Checklist', 'NCFAS-G', 'IIP' (selected), 'IAT Meetings/Journal', and 'Documents'. Below the navigation bar, there are tabs for 'Goals', 'Referrals', and 'Notes'. The 'Goals' tab is active, displaying a table of goals. The table has columns for 'Goal', 'Referral', 'Date Referred', 'Follow-up Date', 'Services Provided', and 'Utilization'. Two goals are listed: 'Present housing is not threatened.' and 'Refers to caregivers' occasionally planning time for learning activities...'. Each goal has a corresponding referral entry with details on the date referred, follow-up date, services provided, and utilization status (e.g., 'REFER...', 'YES').

Goal	Referral	Date Referred	Follow-up Date	Services Provided	Utilization
Present housing is not threatened.	Community Action Agency of Northeast AL	4/8/2026	4/24/2026	Housing Job Training/Support	REFER...
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.	ABC Kids-Tracing and Phonics	4/8/2026	4/24/2026	Education Support	YES

The Referrals tab displays each Service Provided and allows edits to show the Service was "Utilized."

The screenshot shows the 'Referrals' tab of the Individual Intervention Plan (IIP) management system. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there are tabs for 'Goals', 'Referrals' (selected), and 'Notes'. The 'Referrals' tab is active, displaying a table of referrals. The table has columns for 'Domain', 'Services Provided', 'Agency', 'Follow-up Date', 'Referral For', 'Date', and 'Utilization'. Three referrals are listed: 'Addiction Treatment', 'Housing', and 'Education Support'. Each referral has a corresponding entry with details on the date, referral for, and utilization status (e.g., 'REFERRAL', 'YES').

Domain	Services Provided	Agency	Follow-up Date	Referral For	Date	Utilization
	Addiction Treatment	211	4/2/2026		3/31/2026	REFERRAL
A	Housing Job Training/Support	Community Action Agency of Northeast AL	4/24/2026	Family	4/8/2026	REFERRAL
A	Education Support	ABC Kids-Tracing and Phonics	4/24/2026	Family	4/8/2026	YES

From either the Goals or Referrals tab, the Individual Intervention Plan (IIP) can be printed.

This screenshot is identical to the previous one, showing the 'Referrals' tab. A red box highlights the 'Print' button located in the top right corner of the tab's content area, next to the '+ Add' button.

In addition, Notes regarding the IIP can be added here to keep confidential or make public.

The screenshot shows the 'Notes' tab of the Individual Intervention Plan (IIP) management system. The top navigation bar is the same. Below the navigation bar, there are tabs for 'Goals', 'Referrals', and 'Notes' (selected). The 'Notes' tab is active, displaying a section for 'IIP Notes' with a sub-header 'Manage notes associated with IIPs'. A red box highlights the '+ Add' button in the top right corner of the tab's content area.

Adding an IIP Note, the date, tag and note are required. If you want to make a note “Public,” you can choose the Advanced area.

HELPING FAMILIES INITIATIVE
Initial Individualized Intervention Plan
Autauga, Chilton, Elmore Counties DA
CJ Robinson

OVERVIEW

STUDENT	PARENT / GUARDIAN
Test Case #1	Test Guardian #1
REPORT DATE	
4/8/2026	

GOALS & REFERRALS

DOMAIN	SUBSCALE	DATE REFERRED
A. Environment	Housing Stability	4/8/2026
REFERRAL	Community Action Agency of Northeast AL - Housing, Job Training/Support	
GOAL	Present housing is not threatened.	

DOMAIN	SUBSCALE	DATE REFERRED
A. Environment	Learning Environment	4/8/2026
REFERRAL	ABC Kids-Tracing and Phonics - Education Support	
GOAL	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.	
Website: Free Education App		

OTHER REFERRALS

211 - Addiction Treatment

Phone: 888-421-1266
Email: info@211connectsalabama.org

Website: 211connectsalabama.org
Address: Montgomery AL 36102

SIGNATURES

Case Worker	Parent/Guardian	Date

NOTES

4/9/2026 - Mitzi Howard
Review educational goals with your case officer and your teacher

Note

Date *
04/08/2026 08:46 AM

Note *
Review educational goals with your case officer and your teacher

Tags *
Please provide one or more note type.
IIP Created X Select...
Advanced

Cancel Save

Note

Date *
04/08/2026 08:46 AM

Note *
Review educational goals with your case officer and your teacher

Tags *
Please provide one or more note type.
IIP Created X Select...
Advanced
Visibility
☒ Public
Enable this option to display on printed reports

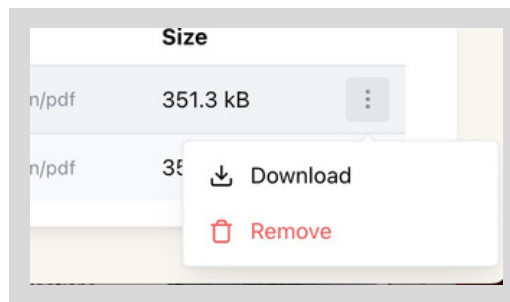
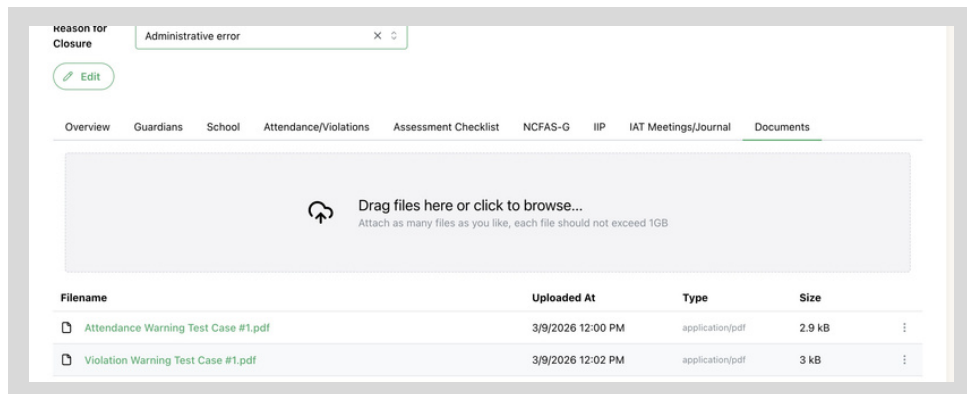
Cancel Save

IAT Meetings (Under Development)

Administration

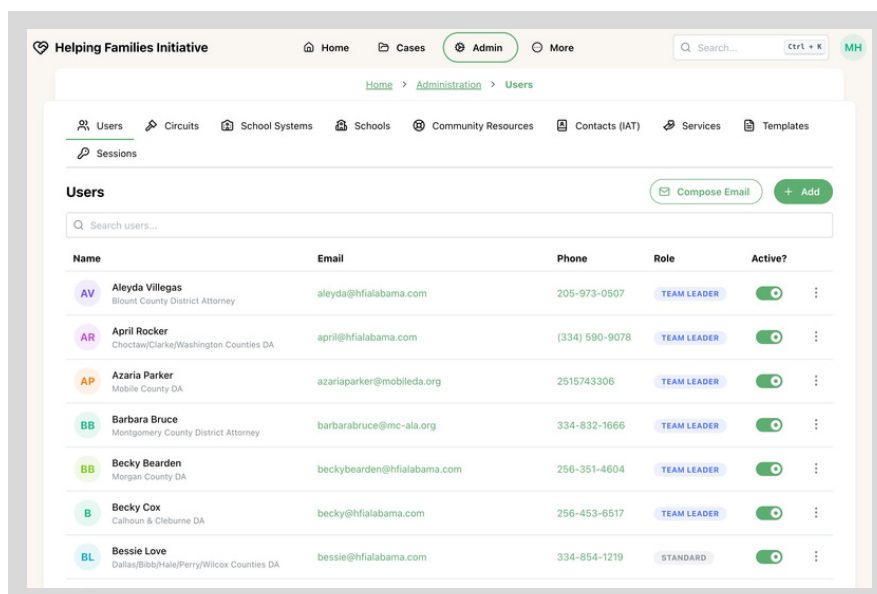
Documents

Documents will display all letters, texts and emails sent and can be recreated using the 3 dots if needed.



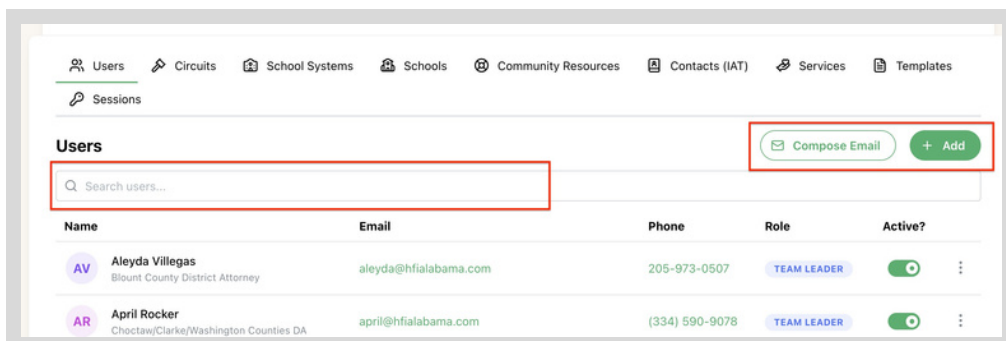
Users

The Administration module contains details for the circuit that are primarily handled by the Team Leader.



Use search to find a particular team member or list of team members. Emails can be sent to all team members. Each user must have an email address.

Choose Add to add a new team member.

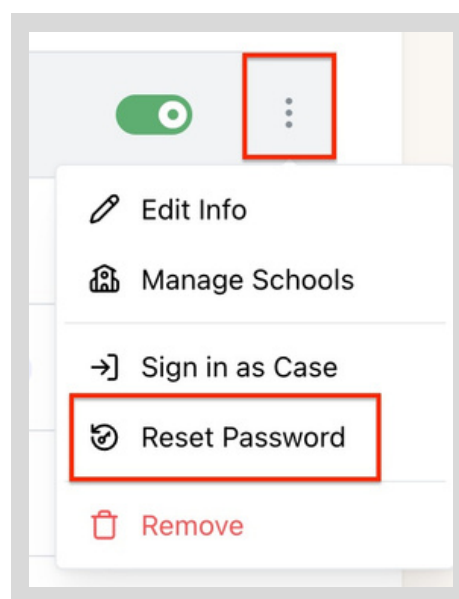


Add all of the details for this user, including a phone number if you plan to use the Case Officer phone number in your letters.

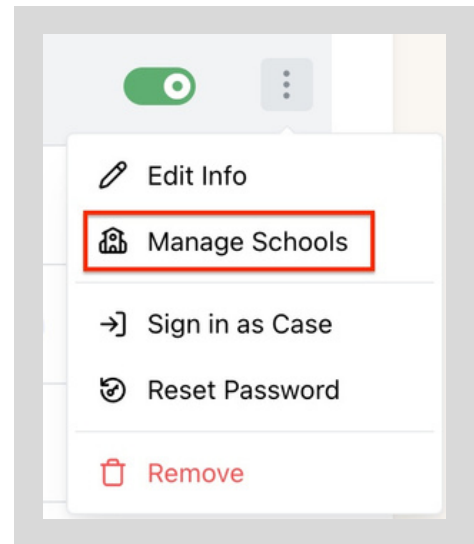
A screenshot of the 'Add New User' form. It has a title 'Add New User' and a user icon. The form contains several input fields: 'First Name *', 'Case State', 'Last Name *', 'Admin 3', 'Email *' (with the value 'support+2@mossrock.com'), 'Phone', 'Role *' (a dropdown menu), and 'Circuit *' (a dropdown menu with the text 'Assign a default Circuit for this user'). At the bottom is a green 'Add user' button.

Choose 3 dots on right and "Reset Password." Provide a password of at least 8 characters and a special character, not including the User's Name.

Always reset the password and provide it to the User.



To assign your user to a list of schools, go to the Manage Schools.

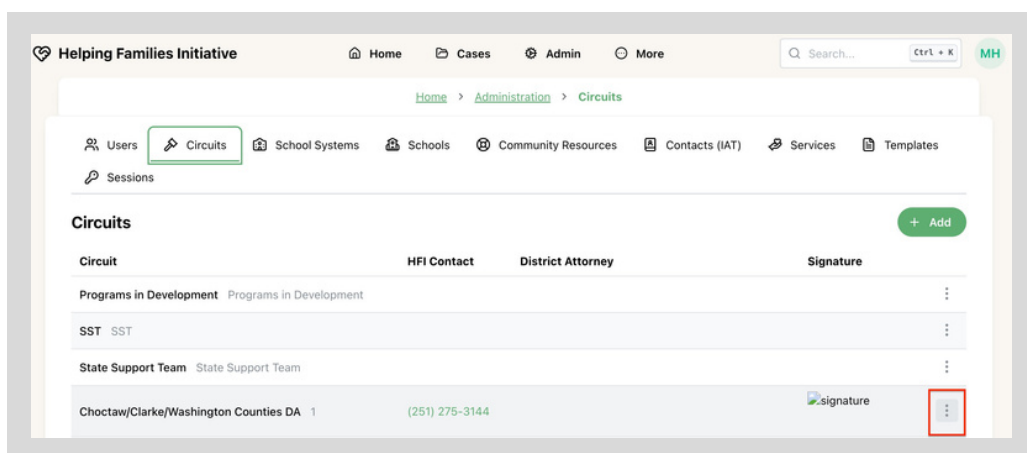


To make a school active, click on the toggle button and the school will become active.



Circuits

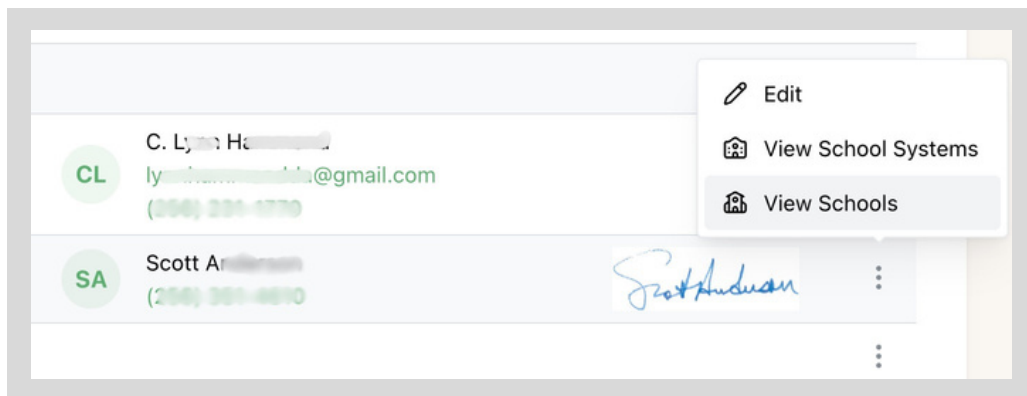
Circuits will house details about each circuit.



Details on the school can be provided choosing the Edit button. Also, a list of school systems and schools within the circuit will be displayed.

The Edit button will allow you to upload an image of your District Attorney's signature. The image for the signature must be in the acceptable file types. Acceptable file types include: PNG, GIF, JPG/JPEG, SVG, WebP, AVIF, HEIC, and HEIF.

A PDF will not work currently.

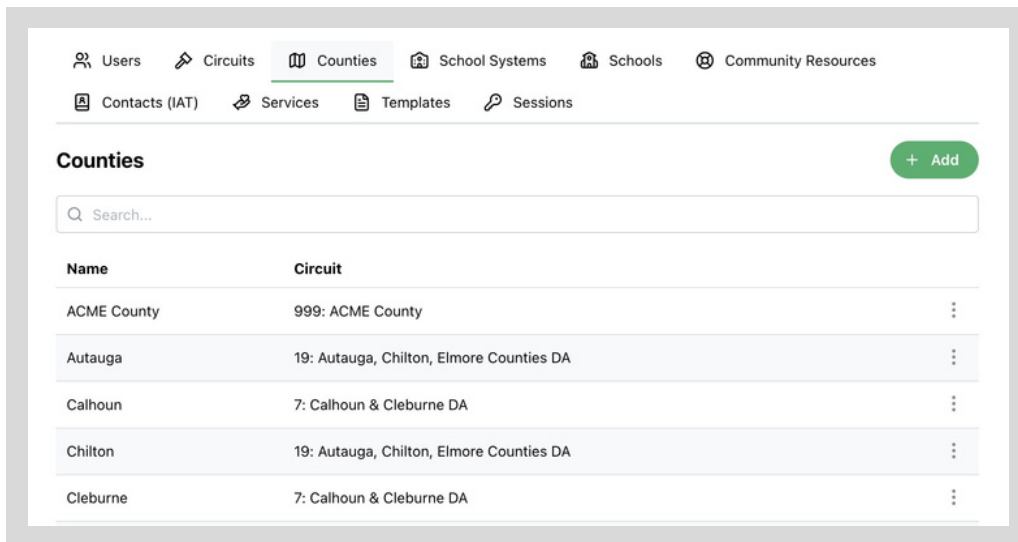


Once edit is chosen, click and choose the image you want to use.

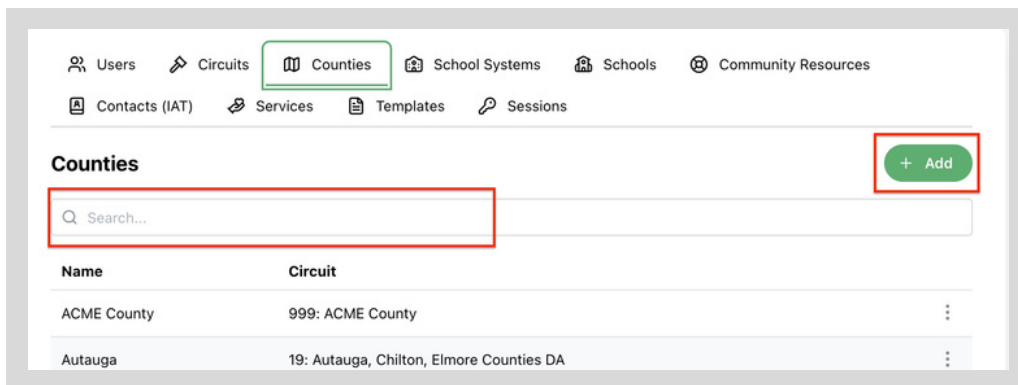
A screenshot of a form for updating user information. It has three sections: 'Email' with a text input field containing 'john.smith@example.com'; 'Phone' with a text input field containing '+1-256-351-4610'; and 'Signature' with a text input field containing 'Upload custom signature image' and a button labeled 'Click to browse...'. The 'Signature' section is highlighted with a red rectangular box. At the bottom left, there is a small icon and the text 'Configuration'.

Counties

A new section, Counties, will allow you to track your Community Resources for each county that is served.



Choose the add button to add the counties. You can also search for counties in the search bar.



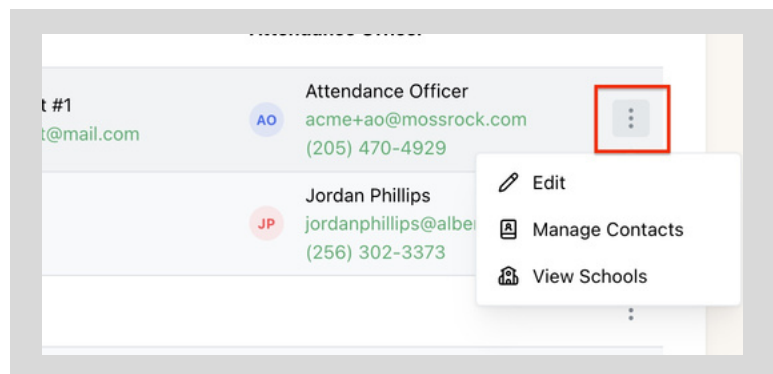
Add the county name and save.

School Systems

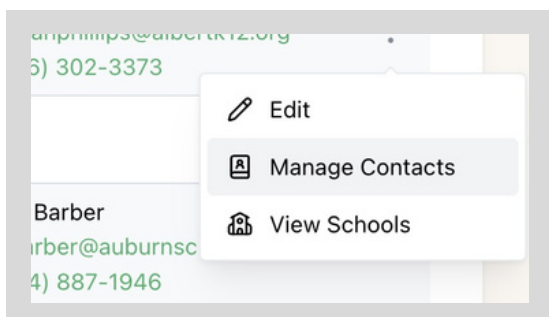
School systems can be added along with the contact information for the Superintendent and Attendance Officer.

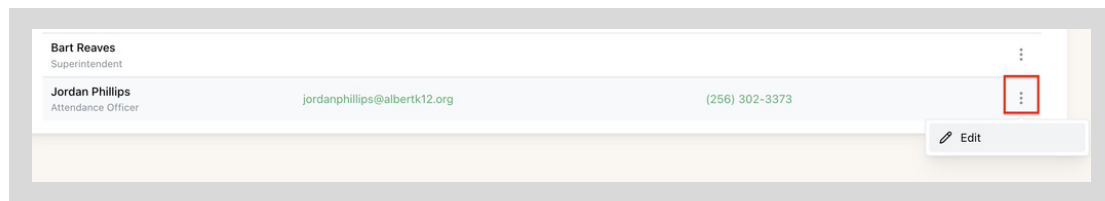
School System	System Email	System Phone	Superintendent	Attendance Officer
ACME Schools ACME County	999TEST nick@mossrock.com	(205) 470-4929	AC Acme Contact #1 acme-contact@mail.com	AO Attendance Officer acme+ao@mossrock.com (205) 470-4929
Alberville City 101 Marshall County DA		(256) 891-1183	BR Bart Reaves	JP Jordan Phillips jordanphillips@albertk12.org (256) 302-3373
Annisston City 105 Calhoun & Cleburne DA				
Auburn City 110 Lee County District Attorney	ajbarber@auburnschools.org	(334) 887-1946		JB Joy Barber ajbarber@auburnschools.org (334) 887-1946

The 3 dots will allow you to edit the school and mark whether the school is “Active” and HFI has a “Signed MOU.”

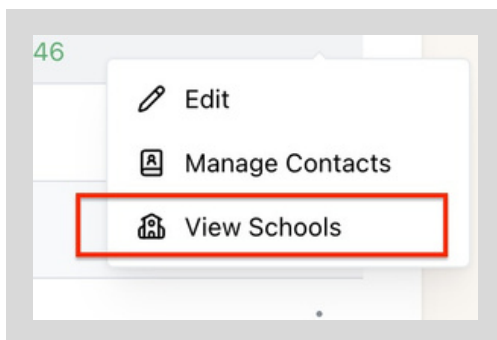


Manage Contacts allows you to edit and add new contacts and View Schools will show you the list of schools involved.





Clicking the View Schools will take you to the list of schools for the system chosen.



×

Edit Contact

First Name

Jordan

Last Name

Phillips

Email

jordanphillips@albertk12.org

Phone

+1256

Role

☐ Administrator
 ☒ Attendance Officer
 ☐ Primary
 ☐ Superintendent
 ☐ System

Cancel

Save

Schools

Schools section includes all schools in a system and new schools can be added if necessary.

Home > Administration > Schools

Users

Circuits

Counties

School Systems

Schools

Community Resources

Contacts (IAT)

Services

Templates

Sessions

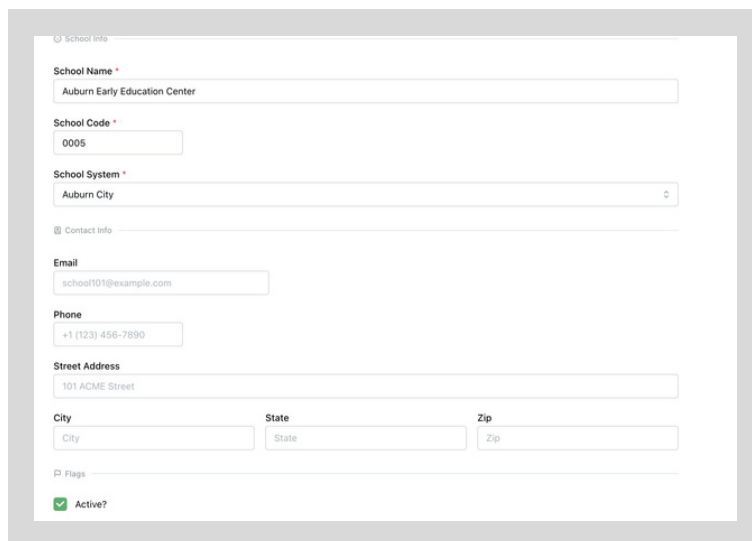
Schools

+ Add

Search schools...

School	Circuit	Email	Phone
Auburn Early Education Center 0005 Auburn City	Lee County District Attorney		
Auburn High School 0010 Auburn City	Lee County District Attorney		
Auburn Junior High School 0020 Auburn City	Lee County District Attorney		

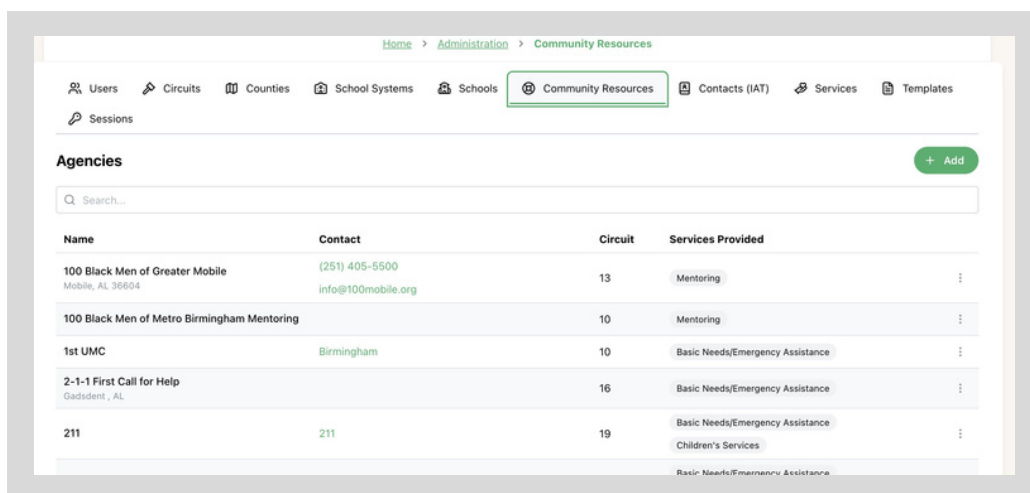
Information can be added to each school.



A screenshot of a 'School Info' form. It contains several input fields: 'School Name' (Auburn Early Education Center), 'School Code' (0005), 'School System' (Auburn City), 'Email' (school101@example.com), 'Phone' (+1 (123) 456-7890), 'Street Address' (101 ACME Street), 'City' (City), 'State' (State), and 'Zip' (Zip). There is also a 'Flags' section with a checked 'Active?' checkbox.

Community Resources

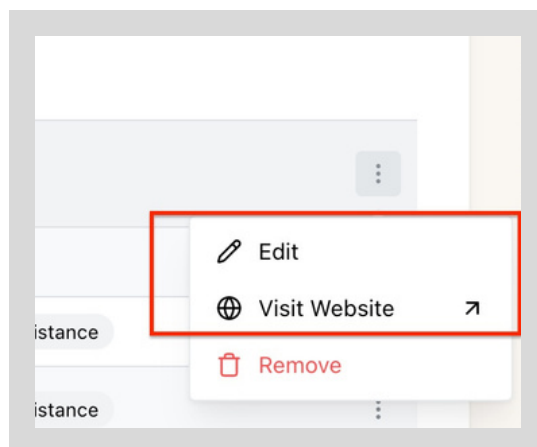
Community Resources houses ALL agencies that serve families in each circuit.



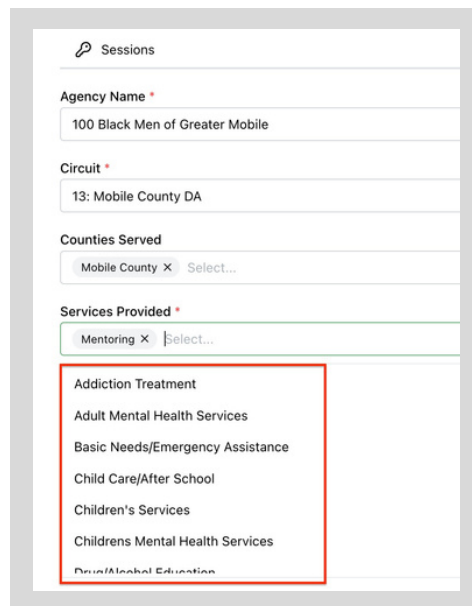
A screenshot of the 'Community Resources' page. It shows a navigation bar with 'Home > Administration > Community Resources'. Below the navigation bar is a table of agencies. The table has columns for Name, Contact, Circuit, and Services Provided. There is an 'Add' button in the top right corner.

Name	Contact	Circuit	Services Provided
100 Black Men of Greater Mobile Mobile, AL 36604	(251) 405-5500 info@100mobile.org	13	Mentoring
100 Black Men of Metro Birmingham Mentoring		10	Mentoring
1st UMC	Birmingham	10	Basic Needs/Emergency Assistance
2-1-1 First Call for Help Gadsden, AL		16	Basic Needs/Emergency Assistance
211	211	19	Basic Needs/Emergency Assistance Children's Services

Each resource can be updated/edited.

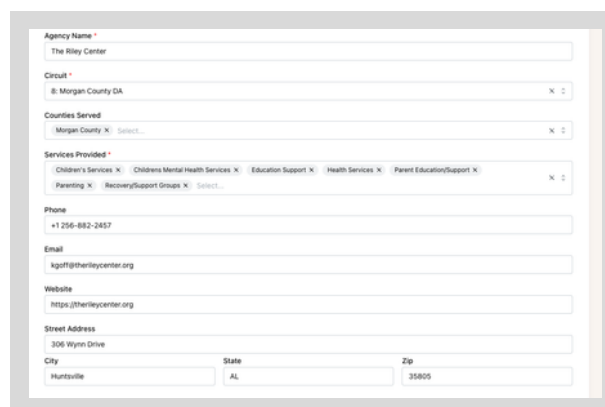


Community resources allows you to choose the county(ies) involved and what services are provided.



The screenshot shows a web form titled "Sessions". It contains several input fields: "Agency Name" with the value "100 Black Men of Greater Mobile", "Circuit" with the value "13: Mobile County DA", "Counties Served" with a dropdown showing "Mobile County" and a "Select..." button, and "Services Provided" with a dropdown showing "Mentoring" and a "Select..." button. A red rectangular box highlights the dropdown menu for "Services Provided", which lists the following options: "Addiction Treatment", "Adult Mental Health Services", "Basic Needs/Emergency Assistance", "Child Care/After School", "Children's Services", "Children's Mental Health Services", and "Drug/Alcohol Education".

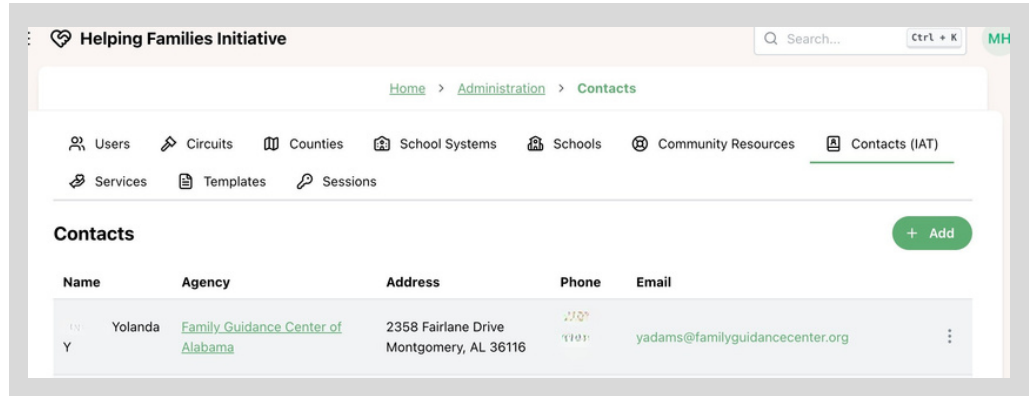
Community Resource phone numbers and web addresses need to have the following format. Phone numbers should include +1 before the area code and the website link should include https:// before the web address.



The screenshot shows a web form titled "Agency Information". It contains several input fields: "Agency Name" with the value "The Riley Center", "Circuit" with the value "8: Morgan County DA", "Counties Served" with a dropdown showing "Morgan County" and a "Select..." button, "Services Provided" with a dropdown showing "Children's Services", "Children's Mental Health Services", "Education Support", "Health Services", and "Parent Education/Support", "Phone" with the value "+1 256-882-2457", "Email" with the value "kgott@therileycenter.org", "Website" with the value "https://therileycenter.org", "Street Address" with the value "306 Wynn Drive", "City" with the value "Huntsville", "State" with the value "AL", and "Zip" with the value "35805".

Contacts

Contacts for all roles in agencies and HFI can be added using the + button.



Contacts can be edited and/or removed.

Each contact can be assigned to an agency that has been added. If the individual is part of the IAT team, you can mark it here and they will display in the IAT meeting tab if chosen. Confidentiality Form completion can be documented here.

Agency *

Family Guidance Center of Alabama

Families and Children Experiencing Separation (FACES)

Family Assistance Program (DHR)

Family Counseling Columbus

Family Court Judicial Assistant-Russell County (Linda Elias)

Family Court of Jefferson Co

Family Guidance Center

✓ Family Guidance Center of Alabama

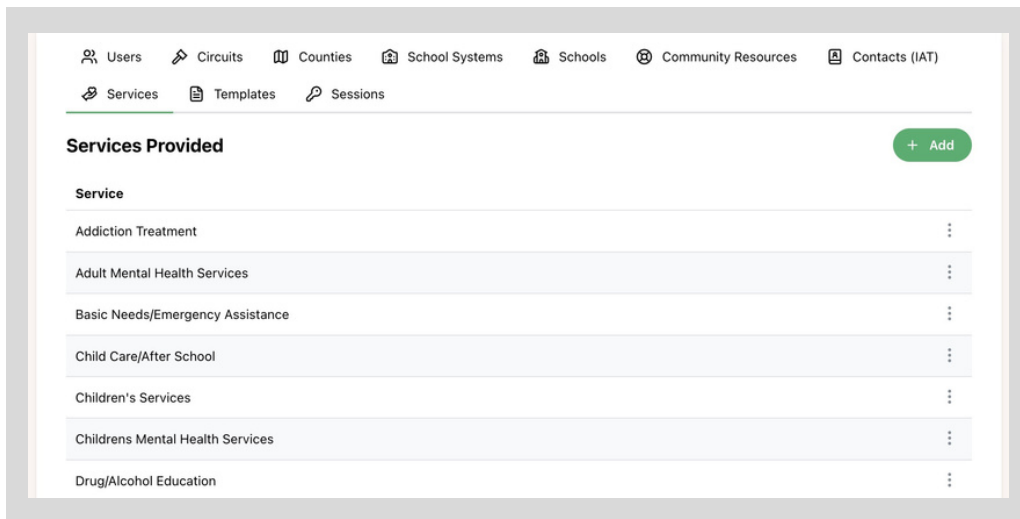
Options

☒ IAT Active?

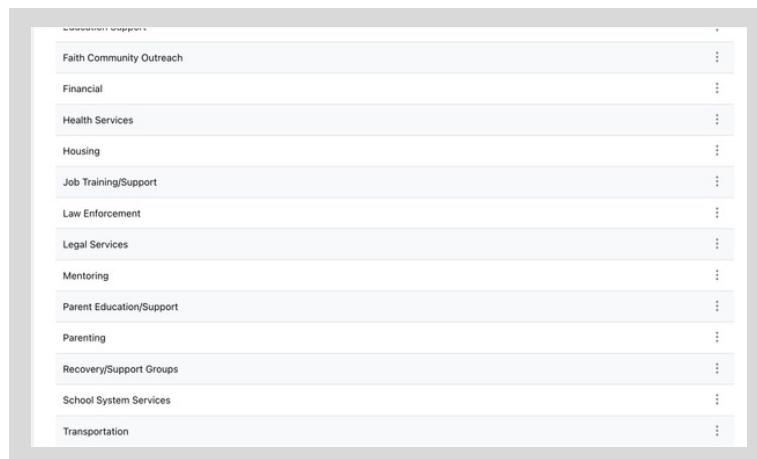
☒ Confidentiality Form Signed

Services

All services provided by agencies are listed here and will populate in the Community Resources drop down.



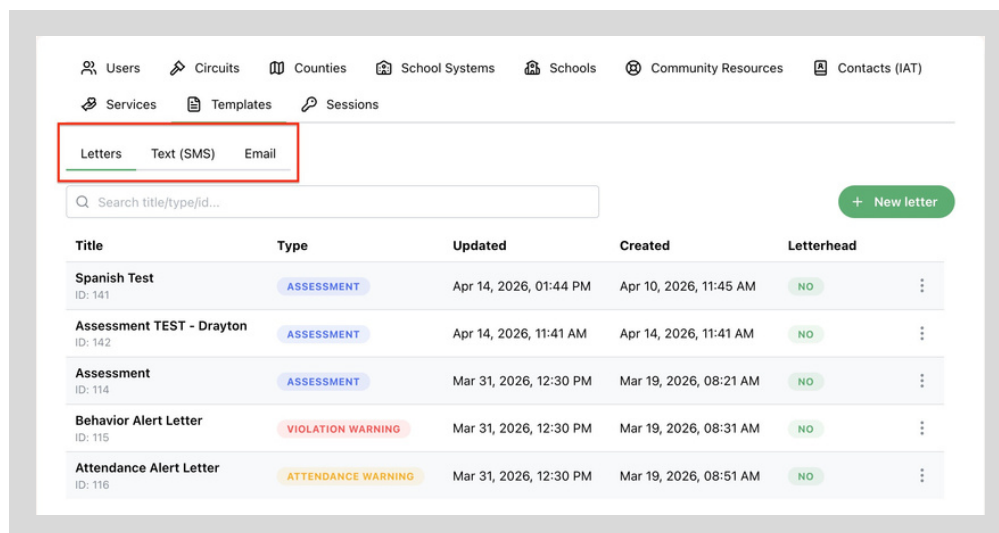
Service	
Addiction Treatment	⋮
Adult Mental Health Services	⋮
Basic Needs/Emergency Assistance	⋮
Child Care/After School	⋮
Children's Services	⋮
Childrens Mental Health Services	⋮
Drug/Alcohol Education	⋮



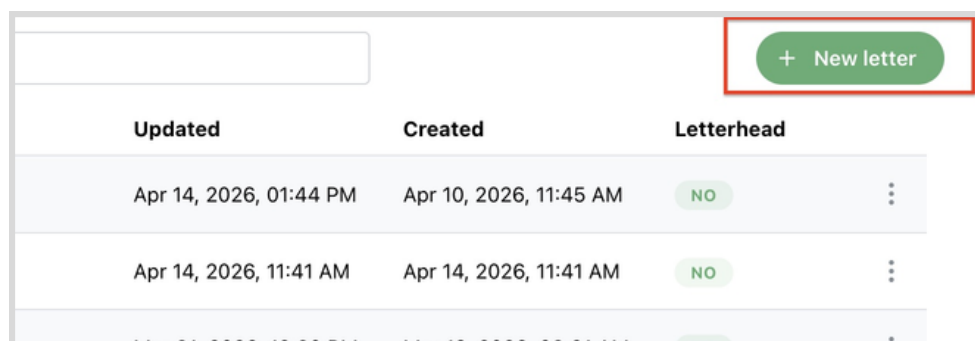
Faith Community Outreach	⋮
Financial	⋮
Health Services	⋮
Housing	⋮
Job Training/Support	⋮
Law Enforcement	⋮
Legal Services	⋮
Mentoring	⋮
Parent Education/Support	⋮
Parenting	⋮
Recovery/Support Groups	⋮
School System Services	⋮
Transportation	⋮

Templates

The Templates module will allow you to create your own letter, text and email templates to send to families. Below are examples. Each template will show in the drop down on case list views and/or individual cases.

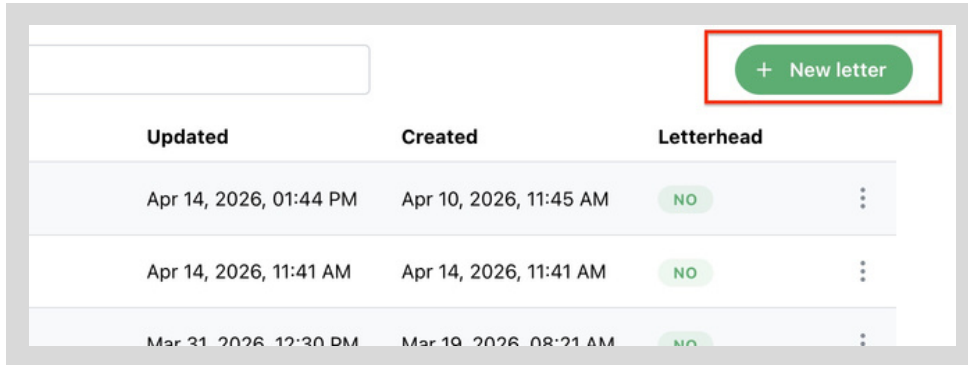


To add a new letter template, click the + button.



Letters

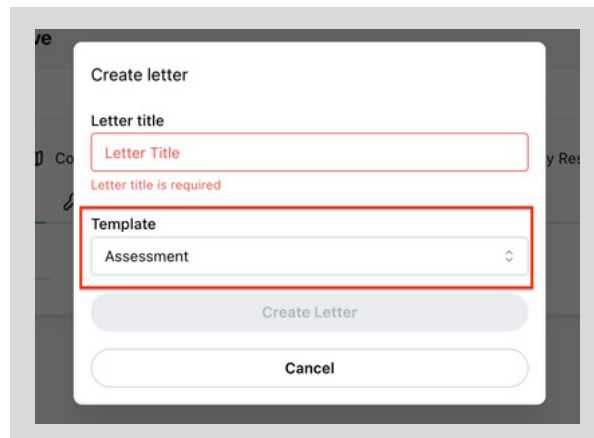
To add a new letter template, click the + button.



The screenshot shows a web interface for managing letter templates. At the top right, there is a green button labeled '+ New letter' which is highlighted with a red rectangular box. Below this is a table with three columns: 'Updated', 'Created', and 'Letterhead'. The table contains three rows of data, each representing a letter template. The first row shows an update time of 'Apr 14, 2026, 01:44 PM', a creation time of 'Apr 10, 2026, 11:45 AM', and a status of 'NO'. The second row shows an update time of 'Apr 14, 2026, 11:41 AM', a creation time of 'Apr 14, 2026, 11:41 AM', and a status of 'NO'. The third row shows an update time of 'Mar 31, 2026, 12:30 PM', a creation time of 'Mar 19, 2026, 08:21 AM', and a status of 'NO'. Each row also has a vertical ellipsis icon on the right side.

Updated	Created	Letterhead
Apr 14, 2026, 01:44 PM	Apr 10, 2026, 11:45 AM	NO
Apr 14, 2026, 11:41 AM	Apr 14, 2026, 11:41 AM	NO
Mar 31, 2026, 12:30 PM	Mar 19, 2026, 08:21 AM	NO

All templates require a title of the letter, i.e. Assessment Warning letter and a type of letter is also required so that the letter choices will be display properly when you choose them.



The screenshot shows a 'Create letter' form. It has two main input fields: 'Letter title' and 'Template'. The 'Letter title' field contains the text 'Letter Title' and has a red border. Below it, there is a red error message that says 'Letter title is required'. The 'Template' field is a dropdown menu with 'Assessment' selected and has a red border. At the bottom of the form, there are two buttons: 'Create Letter' and 'Cancel'.

Create letter

Letter title

Letter Title

Letter title is required

Template

Assessment

Create Letter

Cancel

Either a letterhead pdf can be uploaded or you can create a letter by uploading images to create the letter.

Letters Text (SMS) Email

New Letter Template: Assessment Letter Test 2

Letterhead PDF Top Image Footer Image Left Image Left width Standard

Font size 12px

Cancel Save

Use letterhead on backside of page Switch to backside

Dear {{guardianFullName}},
{{streetAddress}}
{{city}}, {{state}}, {{zip}}

It has been reported to the Helping Families Initiative that your child, {{childName}}, 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 Test Thirteen to review with you the resources and options that can support you and your child in this journey.

Using images, you can scale the size of the image in the system. Once an image is uploaded, you can increase or decrease the size of the image. We recommend setting the image size before adding it to the template.

Users Circuits Counties School Systems Schools Community Resources Contacts (IAT) Services Templates Sessions

New Letter Template: Assessment Letter Test 2

Letterhead PDF Top Image Footer Image Left Image Left width Standard Font size 12px

Cancel Save

Use letterhead on backside of page Switch to backside

Dear {{guardianFullName}},
{{streetAddress}}
{{city}}, {{state}}, {{zip}}

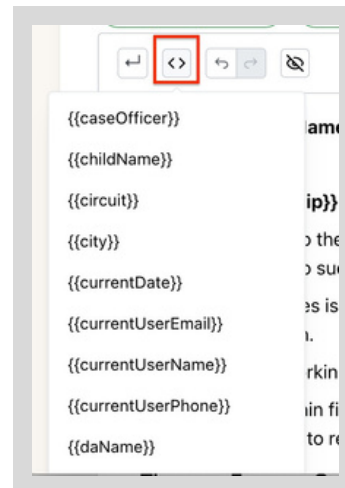
It has been reported to the Helping Families Initiative that your child, {{childName}}, may benefit from additional resources to succeed in school.

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

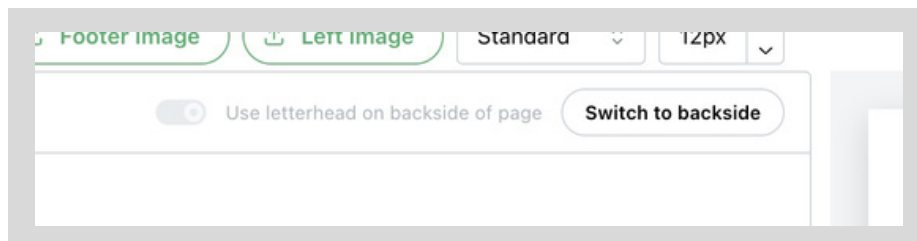
We look forward to working together to keep your child on the path to graduation and future success.

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

Choosing this icon will allow you to place various placeholders in the letter. Only these placeholders can be used. Make sure to not use an old letter that doesn't use them.



You can switch to the backside of the letter to create a Spanish version. If you want letterhead on both sides, choose the toggle button to create it on both sides.

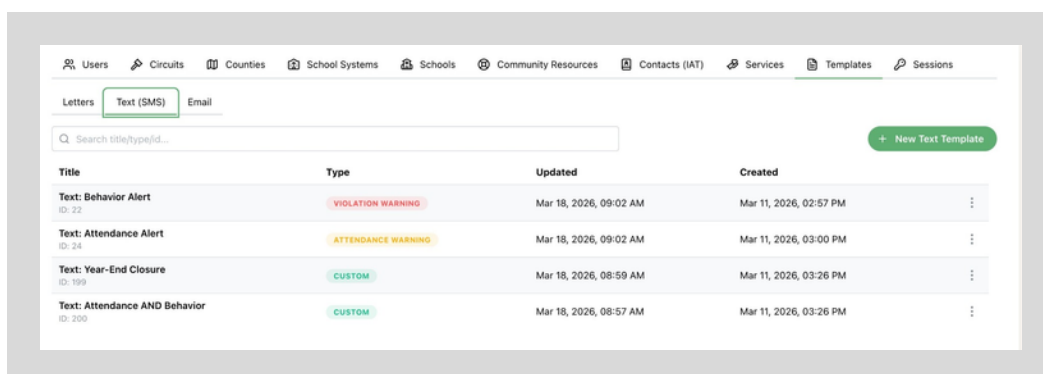


To keep from having your letter go to a second page, please change the size of fonts using the Font button.

[Please see this video for additional instructions.](#)

Texting

Similar to letters, text templates can be created for each type of letter you send to a family.



Create text template

Text template title

Text Template Title

Letter title is required

Template

Assessment

Create Text

Cancel

Each template will have a title and template type. You have Warning, Assessment and Custom types of templates for each text.

Various placeholders can be used to complete your templates.

Letters Text (SMS) Email

TEST Custom Template

Type: Custom

Text template content

Hi {{guardianFullName}},

We look forward to seeing you at our office on May 20th at 2:00 pm for our Open House. To discuss {{childName}}'s recent absences. According to school records, {{childName}} has {{ua:count}} absences and we want to help you improve your child's attendance record

Cancel Save Text Template

Insert Placeholders

- {{currentUserPhone}}
- {{daName}}
- {{guardianFullName}}
- {{letterHead}}
- {{schoolName}}
- {{state}}
- {{streetAddress}}
- {{studentId}}
- {{ua:count}}
- {{ua:dates}}
- {{violation:count}}
- {{violations:dates}}

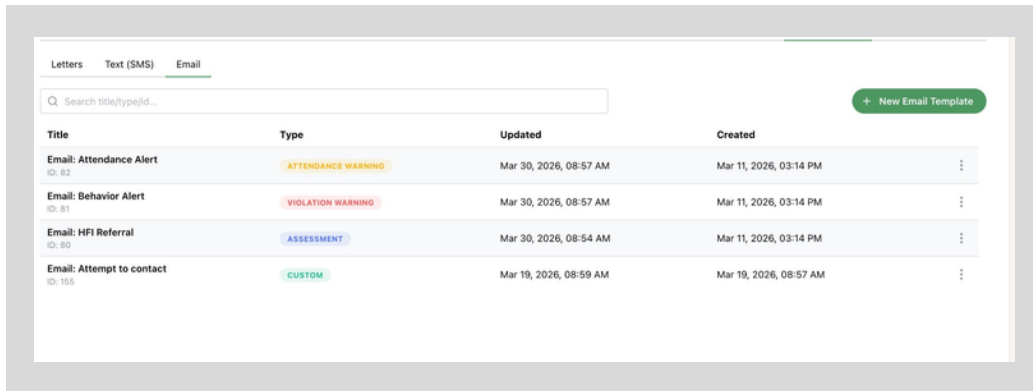
All texting templates may be edited or duplicated for new template creation.

New Text Template

Created	
May 11, 2026, 09:25 AM	
Mar 11, 2026, 02:57 PM	- Edit - Duplicate - Delete
Mar 11, 2026, 03:00 PM	
Mar 11, 2026, 03:26 PM	
Mar 11, 2026, 03:26 PM	

Email

Email templates can also be created for attendance, behavior and custom communications with families



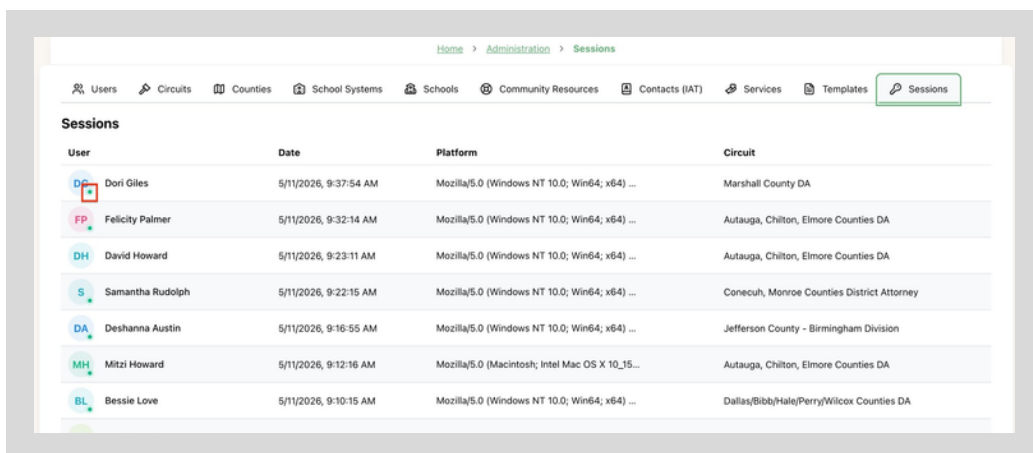
The screenshot shows a web interface for managing email templates. At the top, there are tabs for 'Letters', 'Text (SMS)', and 'Email', with 'Email' being the active tab. Below the tabs is a search bar with the placeholder text 'Search title/type/id...'. To the right of the search bar is a green button labeled '+ New Email Template'. Below these elements is a table with four columns: 'Title', 'Type', 'Updated', and 'Created'. The table contains four rows of email templates.

Title	Type	Updated	Created
Email: Attendance Alert ID: 82	ATTENDANCE WARNING	Mar 30, 2026, 08:57 AM	Mar 11, 2026, 03:14 PM
Email: Behavior Alert ID: 81	VIOLATION WARNING	Mar 30, 2026, 08:57 AM	Mar 11, 2026, 03:14 PM
Email: HFI Referral ID: 80	ASSESSMENT	Mar 30, 2026, 08:54 AM	Mar 11, 2026, 03:14 PM
Email: Attempt to contact ID: 155	CUSTOM	Mar 19, 2026, 08:59 AM	Mar 19, 2026, 08:57 AM

The functionality for emails is identical to text templates.

Sessions

The system will also log who enters the system and the “green dot” distinguishes user currently in the system.

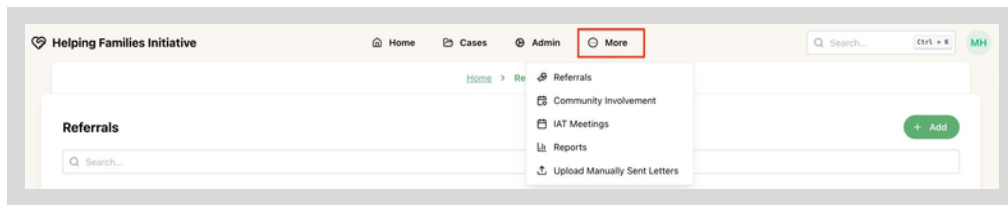


The screenshot shows a web interface for viewing session logs. At the top, there is a breadcrumb trail: 'Home > Administration > Sessions'. Below this is a navigation bar with icons and labels for 'Users', 'Circuits', 'Counties', 'School Systems', 'Schools', 'Community Resources', 'Contacts (IAT)', 'Services', 'Templates', and 'Sessions'. The 'Sessions' tab is highlighted. Below the navigation bar is a table titled 'Sessions' with four columns: 'User', 'Date', 'Platform', and 'Circuit'. The table contains seven rows of session logs. Each row has a small colored dot next to the user's name, indicating their status.

User	Date	Platform	Circuit
DG Dori Giles	5/11/2026, 9:37:54 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Marshall County DA
FP Felicity Palmer	5/11/2026, 9:32:14 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Autauga, Chilton, Elmore Counties DA
DH David Howard	5/11/2026, 9:23:11 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Autauga, Chilton, Elmore Counties DA
S Samantha Rudolph	5/11/2026, 9:22:15 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Conecuh, Monroe Counties District Attorney
DA Deshanna Austin	5/11/2026, 9:16:55 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Jefferson County - Birmingham Division
MH Mitzi Howard	5/11/2026, 9:12:16 AM	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_...	Autauga, Chilton, Elmore Counties DA
BL Bessie Love	5/11/2026, 9:10:15 AM	Mozilla/5.0 (Windows NT 10.0; Win64; x64) ...	Dallas/Bibb/Hale/Perry/Wilcox Counties DA

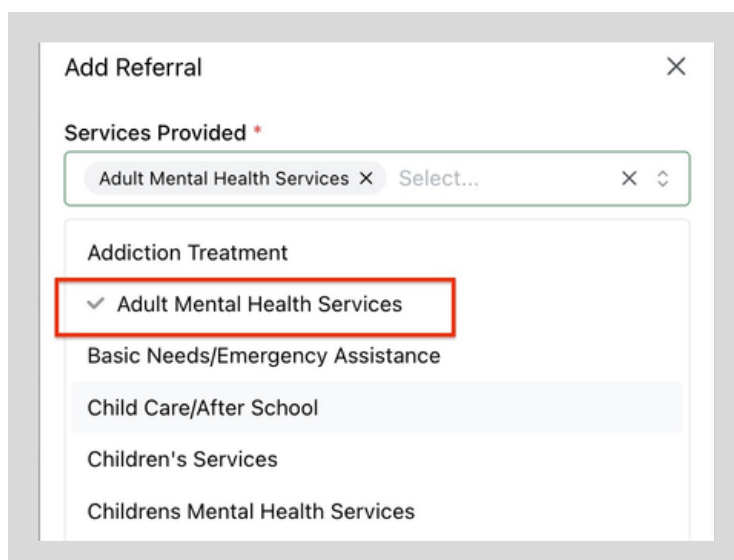
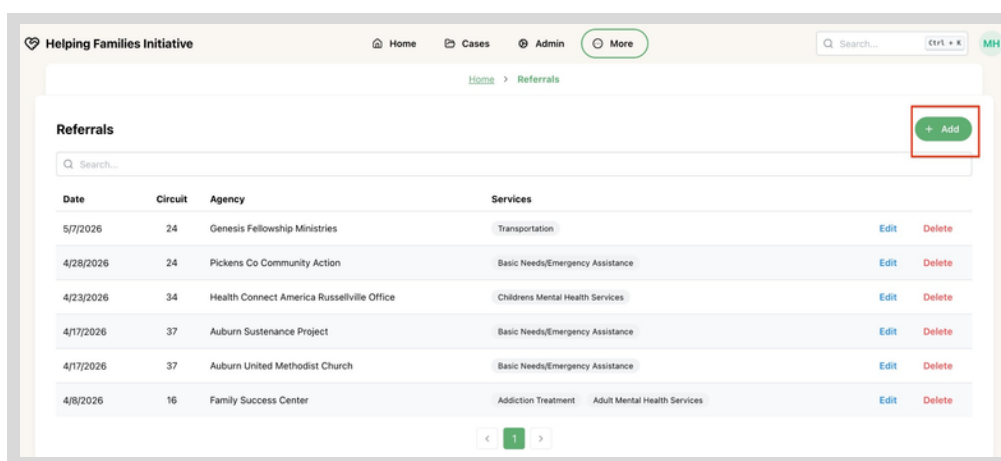
More

In this section, additional features include: Referrals, Community Involvement, IAT Meetings, and Reports.



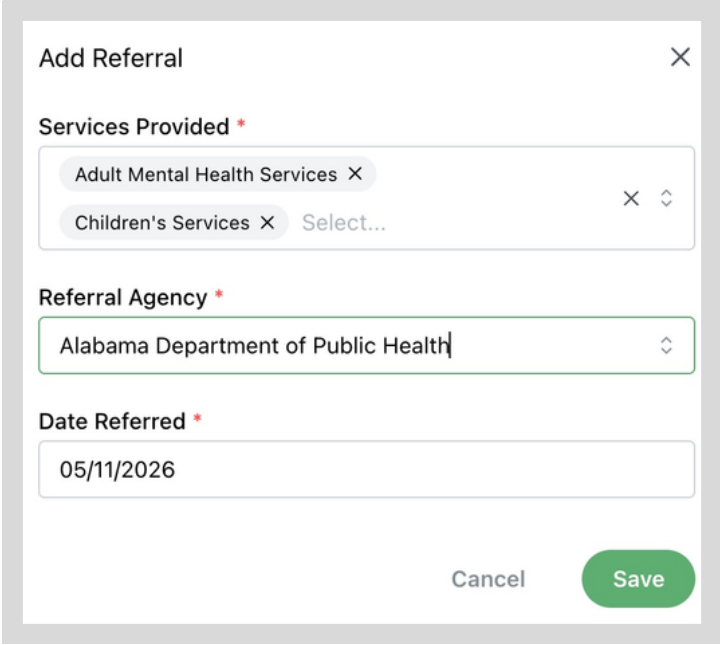
Referrals

Families and/or students who are referred to a service but DO NOT have a case should be recorded here. Public referrals allow you to serve more families than those recorded in the system.



Public referrals will allow you to choose multiple services from one agency if offered.

Once the services are chosen, the Referral Agency and Date Referred can be chosen.

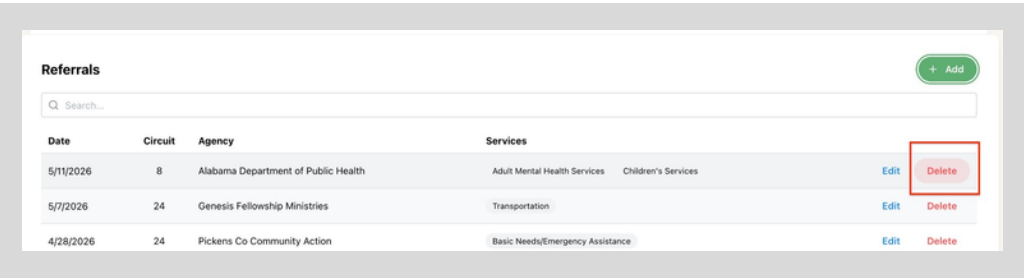


The 'Add Referral' form contains the following fields:

- Services Provided ***: A multi-select dropdown menu with 'Adult Mental Health Services' and 'Children's Services' selected. A 'Select...' button is visible.
- Referral Agency ***: A dropdown menu with 'Alabama Department of Public Health' selected.
- Date Referred ***: A text input field containing '05/11/2026'.

At the bottom right, there are 'Cancel' and 'Save' buttons.

Referrals can be edited or deleted.

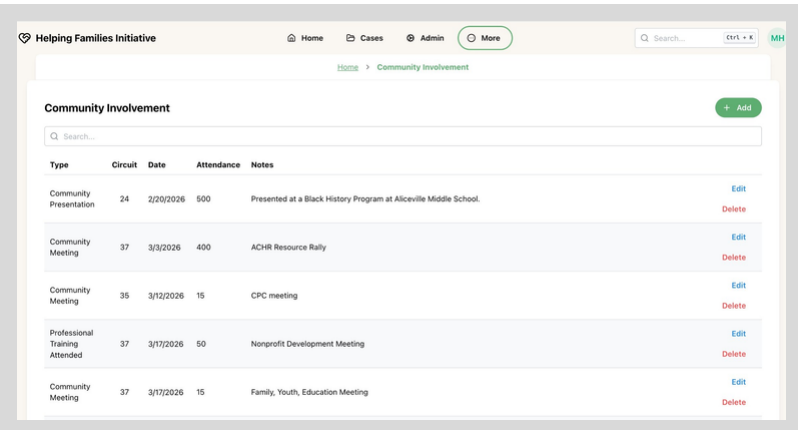


The 'Referrals' table displays the following data:

Date	Circuit	Agency	Services	
5/11/2026	8	Alabama Department of Public Health	Adult Mental Health Services Children's Services	Edit Delete
5/7/2026	24	Genesis Fellowship Ministries	Transportation	Edit Delete
4/28/2026	24	Pickens Co Community Action	Basic Needs/Emergency Assistance	Edit Delete

Community Involvement

When you attend community events, record details in the solution so those can be counted in statewide reporting.



The 'Community Involvement' table displays the following data:

Type	Circuit	Date	Attendance	Notes	
Community Presentation	24	2/20/2026	500	Presented at a Black History Program at Aliceville Middle School.	Edit Delete
Community Meeting	37	3/3/2026	400	ACHR Resource Rally	Edit Delete
Community Meeting	35	3/12/2026	15	CPC meeting	Edit Delete
Professional Training Attended	37	3/17/2026	50	Nonprofit Development Meeting	Edit Delete
Community Meeting	37	3/17/2026	15	Family, Youth, Education Meeting	Edit Delete

Types of community involvement can be recorded. If there are additional community event types, let us know.

Edit Community Involvement [X]

Type *

Professional Training Attended

Community Meeting

Community Presentation

Professional Training Presentation

✓ Professional Training Attended

Notes

Nonprofit Development Meeting

Cancel Save

IAT Meetings

Interagency Team Meetings should be recorded in the system so that reporting can be accurate.

Helping Families Initiative

Home > IAT Meetings

IAT Meetings
Manage Inter-Agency Team Meetings

+ Add

Q Search...

Date / Location	Cases	Attendees	Circuit	
4/30/2026, 11:00:00 PM TESTTSTTSTTSTESTE	0	0	19	⋮
4/22/2026, 10:00:00 AM Via Zoom	3	0	10	⋮
4/8/2026, 3:00:00 PM	0	0	13	⋮

Choosing the “Add +” button will allow you to choose a beginning and ending time for your IAT meetings. Locations could be a conference room, zoom, teams, etc.

The screenshot shows a web interface for creating a new meeting. At the top, there is a breadcrumb trail: Home > IAT Meetings > New. The form includes fields for 'Start' (05/01/2026 12:00 PM) and 'End' (05/01/2026 12:00 AM). Below these is a 'Location' field with the placeholder text 'I.e. "Conference Room", meeting link, etc.' and a 'Meeting Summary' field with the placeholder text 'Add a meeting summary here...'. A date and time picker is open, showing a calendar for May 2026. The date '1' is selected. Below the calendar, a time dropdown is set to '12:00 AM'. To the right of the time picker are 'Cancel' and 'Save' buttons.

Once the meeting is added, then Attendees can be chosen.

The screenshot shows the 'Meeting Detail' page for an 'IAT Meeting: 5/1/2026'. At the top, there is a breadcrumb trail: Home > IAT Meetings > Meeting Detail. Below the title, there are tabs for 'Details & Attendees (0)', 'Cases (0)', and 'Documents (0)'. The 'Details & Attendees (0)' tab is active. The form includes fields for 'Start' (05/01/2026 12:00 PM) and 'End' (05/01/2026 01:00 PM). Below these is a 'Location' field with the value 'Conference Room' and a 'Meeting Summary' field with the value 'Reviewing several student cases.' To the right of the form is an 'Attendees' section with a 'Name' field and the text 'No attendees added.' Above the 'Attendees' section are 'Download' and '+ Add' buttons. The '+ Add' button is highlighted with a red box. At the bottom of the form are 'Cancel' and 'Save' buttons.

Attendees can be added by choosing their names from the list provided in the IAT Contacts list.

Add Attendees

Search contacts

Contact

- ☐ [Redacted], Yolanda
Family Guidance Center of Alabama
- ☐ [Redacted], Scott
- ☐ [Redacted], LaVennia
Youth Facility
- ☐ [Redacted], Sherunda
Youth Facility
- ☐ [Redacted], Chelsea
Generational Changers
- ☐ [Redacted], Lakeita
Premier Services (Lakeita Arrington-Judkins)
- ☐ [Redacted], Crystal S
Destiny Driven Inc.
- ☐ [Redacted], Jacklyn
Oneonta City School System

Cancel Add selected

Once chosen, attendees will display on the right and can be downloaded if needed.

IAT Meeting: 5/1/2026

Details & Attendees (2) Cases (0) Documents (0)

Start * 05/01/2026 12:00 PM End * 05/01/2026 01:00 PM

Location Conference Room

Meeting Summary Reviewing several student cases.

Attendees

Download + Add

Name

- Scott
- Yolanda
Family Guidance Center of Alabama

Cases tab here will allow you to choose what students you want to involve in the IAT meeting.

IAT Meeting: 5/1/2026

Details & Attendees (2) **Cases (0)** Documents (0)

Start * 05/01/2026 12:00 PM End * 05/01/2026 01:00 PM

IAT Meeting: 5/1/2026

Details & Attendees (2)

Cases (0)

Documents (0)

Download

Add

Cases

Student

Status

No cases linked to this meeting.

Similar to adding Attendees, student cases can be added and/or searched for using the Search box.

Add Cases

Q

Search cases

☐

KA

s, Keren Esterfany

Decatur High School • Decatur City Schools

CLOSED

☐

MA

Alvarado, Maddox

Hartselle High School • Hartselle City Schools

CLOSED

☐

AA

Abner, Aidan

Danville High School • Morgan County Schools

NEW OFFENSE

☐

MA

Abner, Mark

Falkville Elementary School • Morgan County Schools

NEW OFFENSE

Cases will display once chosen and a list of students can be downloaded.

Details & Attendees (2)

Cases (2)

Documents (0)

Download

Add

Cases

Student

Status

TD

Test DCS 12568220778

Decatur Middle School • Decatur City Schools

CLOSED

TD

TEST2 C Case 123456MH26

Danville Middle School • Morgan County Schools

CLOSED

Documents can be added to the file by browsing your computer and/or drag the files in from a desktop.

Home > IAT Meetings > Meeting Detail

IAT Meeting: 5/1/2026

Details & Attendees (2)

Cases (0)

Documents (0)

Drag files here or click to browse...

Upload one or more files up to 1GB each

Filename

Uploaded At

Type

Size

No documents uploaded.

48

Reports

Multiple reports are provided and can be limited by date range, school system, school and case officer. The state team can limit by Circuit as well.

All of the reports can be created after filters are chosen.

Example of Case Worker Contacts Report

A	B	C	D	E	F	G	H	I	J	K
Date	Student	Student State ID	Case Officer	Case Status	School	School System	Tags			
8/22/25	William Jurnee Alaya	2002630545	Myesha Snow	Closed	Prattville Primary Sch	Autauga County				
8/22/25	Jonathan	1972895773	Myesha Snow	New Offense	Prattville Junior High	Autauga County				
8/28/25	Kiley Brooke	1970837520	Myesha Snow	Closed	Marbury High School	Autauga County	Phone Call			
8/28/25	William Thomas	1972098790	Myesha Snow	Closed	Prattville High School	Autauga County	Phone Call			
8/28/25	Olivia Kathryn	1970952741	Myesha Snow	Closed	Prattville High School	Autauga County	Phone Call			
8/28/25	McKenzie Lynn	1969492998	Myesha Snow	Closed	Prattville High School	Autauga County	Agency Referral			
8/28/25	McKenzie Lynn	1969492998	Myesha Snow	Closed	Prattville High School	Autauga County	Phone Call			
8/28/25	Caden Dorian	2007137511	Myesha Snow	Closed	Prattville Primary Sch	Autauga County				

Example of a Violations Report, which shows counts of ALL types of behavior infractions.

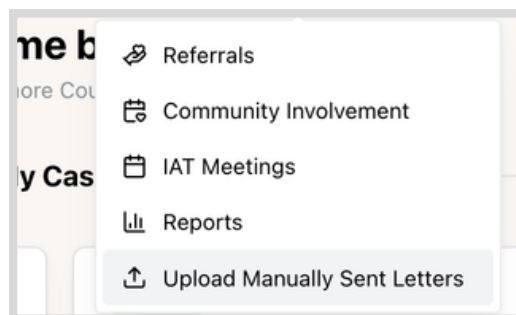
	A	B	C	D	E	F	G
Circuit	All	Interpersonal	Nonviolent	Substance	Weapons		
1	Autauga, Chilton, Elmore Counties DA	1234	153	991	81	9	
2							
3							

An example of the Percent of Negative Scores by Sub-Scale report

Subscale	Domain	# of Student	Percent Total
Housing Stability	Environment	1	1.61
Safety in the Community	Environment	2	3.23
Environmental Risks	Environment	2	3.23
Habitability of Housing	Environment	1	1.61
Learning Environment	Environment	2	3.23
Supervision of Children	Parental Capabilities	3	4.84
Disciplinary Practices	Parental Capabilities	3	4.84
Provision of Development & Enrichment Opportunities	Parental Capabilities	2	3.23
Use of Drugs & Alcohol Interferes with Parenting	Parental Capabilities	0	0
Promotes & Safeguards Child's Education and Development	Parental Capabilities	2	3.23
Parent(s)'s/Caregiver's Literacy	Parental Capabilities	0	0
Parental Resilience	Parental Capabilities	3	4.84
Bonding with Child	Family Interactions	1	1.61
Communication with Child	Family Interactions	1	1.61
Expectations of Child	Family Interactions	0	0
Mutual Support within the Family	Family Interactions	1	1.61
Relationship Between Parents/Caregivers	Family Interactions	1	1.61
Family Routines/Rituals	Family Interactions	0	0
Family Recreation and Play Activities	Family Interactions	0	0
Absence/Presence of DV Between Parents/Caregivers	Family Safety	1	1.61
Absence/Presence of Other Family Conflict	Family Safety	1	1.61
Absence/Presence of Physical Abuse of Child	Family Safety	0	0
Absence/Presence of Emotional Abuse of Child	Family Safety	2	3.23
Absence/Presence of Sexual Abuse of Child	Family Safety	1	1.61
Absence/Presence of Neglect of Child	Family Safety	2	3.23
Absence/Presence of Access to Weapons	Family Safety	0	0
Child's Behavior	Child Well-being	1	1.61
School Performance	Child Well-being	1	1.61
Child's Relationship with Parent/Caregiver	Child Well-being	0	0
Child's Relationship with Sibling(s) and Peers	Child Well-being	0	0

Circuit Specific

For the Mobile office, since most of their letters are sent by the school system, we have a way to upload a spreadsheet provided by the school system.



Home > Upload Manually Sent Letters

Upload Manually Sent Letters

Currently supports the EWT spreadsheet import flow.

Current Import Rules

Only rows where **STUDENTS.Letter_Name = DLS** will create a journal entry. HFI will attach the note to the student's active case, set the journal date from **STUDENTS.Letter_Send_Date**, and generate an **Attendance Warning Letter** note that reads 'EWT warning letter printed on MM/DD/YYYY'.

EWT Spreadsheet

Choose an .xlsx file

Import EWT Spreadsheet