



CONTACT

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HIMSS HANDBOOK

FOR OPERATING THE HOMELESS INFORMATION MANAGEMENT SYSTEM FOR STUDENTS SOFTWARE

UPDATED: 5/1/23

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GETTING STARTED

CONFIGURING YOUR COMPUTER

The HIMSS system is compatible with the most recent versions of Google Chrome, Microsoft Edge, and Mozilla Firefox.

1

ENTER THE WEB ADDRESS IN THE RIGHT PLACE

Ensure that the web address is entered into the browser address bar, not a Search bar such as Google.

2

ADD YOUR HIMSS SITE AS A FAVORITE

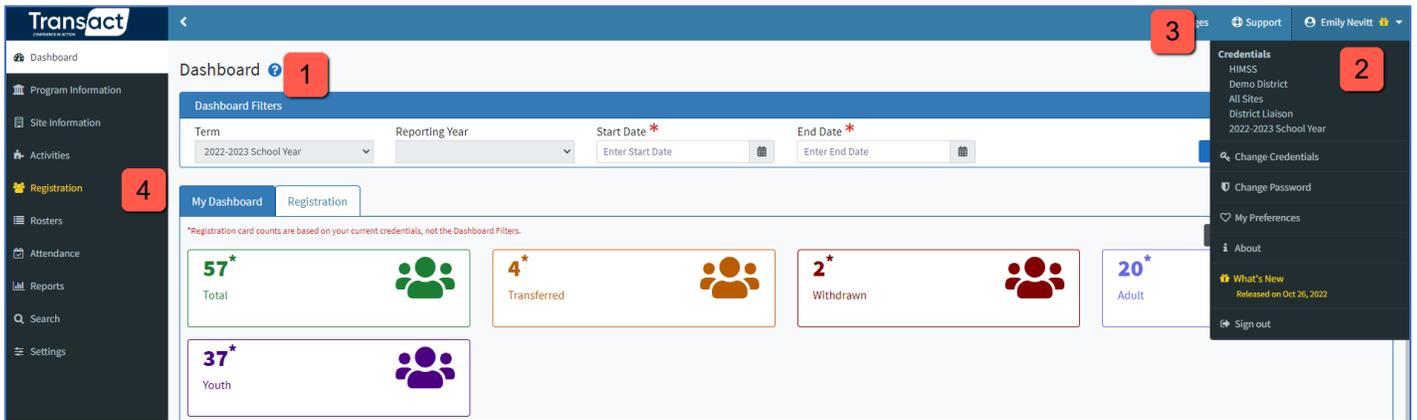
Make it easy to get back to your site by adding it as a bookmark or favoriting in your browser.

3

TURN OFF POP-UP BLOCKERS

Pop-ups are used throughout the system when saving information. If these pop-ups are blocked, some information you enter may not save correctly.

- For Chrome:
 - From the menu in the upper-right corner click Settings. Go to Advanced and click the arrow to expand, find the Privacy and Security section and click Site Settings. Click Pop-ups and redirects. Slide the toggle at the top of the screen so that it is set to Allowed.
- For Edge:
 - From the menu in the upper-right corner click Settings. At the top left of the menu click the Privacy & Security tab (the lock icon). Scroll down to the Security section. Under Block Pop-Ups, click the toggle and set to Off.
- For Firefox:
 - From the menu in the upper-right corner click Options. Click the Privacy & Security tab on the left of the screen. Scroll down to the Permissions section. Uncheck the box for Block Pop-Up Windows.



1

DASHBOARD

The customizable dashboard allows users to select key information they would like to see when the first connect to the system.

2

MY PROFILE

The My Profile area contains information specific to your account, including changing your password. Use Change Credentials to view other School Sites or Terms.

3

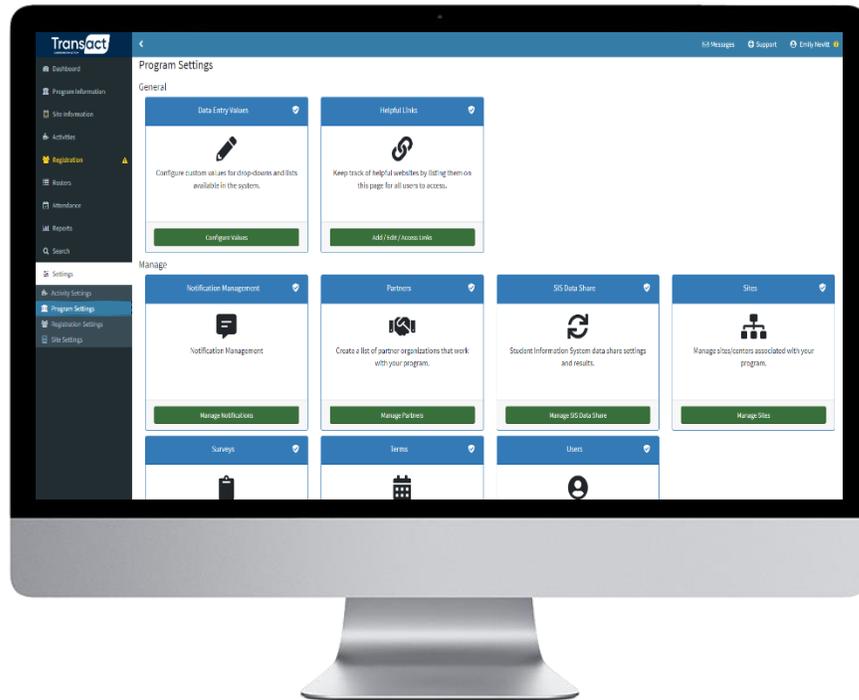
SUPPORT

Submit help requests and access an electronic version of this handbook through the Support menu.

4

NAVIGATION BAR

Use the vertical navigation bar to move through the system. The white highlighting indicates the section of the system which is open on the right side of the system.



DISTRICT PROGRAM SETUP

Program Setup describes how to configure the software to align with your homeless support efforts. These areas of the HIMSS system will be covered.

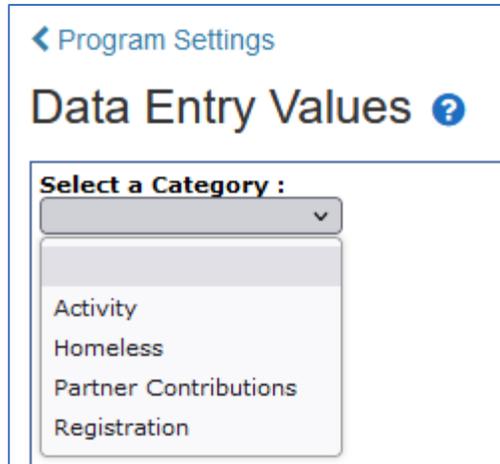
- ✓ Data Entry Values
- ✓ Helpful Links
- ✓ Notification Management
- ✓ Partners
- ✓ SIS Data Share
- ✓ Sites
- ✓ Surveys – see Help document within the HIMSS Survey section or [here](#)
- ✓ Terms
- ✓ Users
- ✓ Custom Fields
- ✓ Required Fields

DATA ENTRY VALUES

Determine values in drop-down and multi-select lists that appear on participant records and other places within HIMSS.

Add/Edit List Values

1. Settings > Program Settings > Configure Values > Select a Category
2. Add, edit, or remove list options as needed.
3. Options that don't apply to your program can be deleted if they have not been used anywhere in the system already.
4. If you are working with a State-wide HIMSS implementation, match your value to the closest State Value. Use "Other" If needed.
5. The Code field is not required.
6. Be sure to click 'Save' after editing any values.



← Program Settings
⌵ Settings > Program Settings > Data Entry Values

Data Entry Values ?

Select a Category :

Activity ▾

Funding Sources

Standardize the entries recorded for Funding Sources

Purpose: APlus allows the state to report and analyze data across all districts. To standardize data for this purpose, the state supplies the wording that will be used to describe activity types, ethnicity, etc. A district can create additional terminology for its own purposes.

Instructions: First, copy state values into place. (Even if a district will accept all values provided by the state, it still needs to copy them into place for each database system managed by APlus.) Edit the district-wide value or add a new one as needed. To add a new value, move to the bottom of the list and begin typing in the first blank line (marked with an asterisk). Link each value to a state value.

Copy State Values

District-wide Value	System Type	State Value	Code	Delete
Federal 21st Century CLC	HIMSS	Federal 21st Century CLC ▾	<input type="text"/>	<input type="checkbox"/>
Foundation Funding	HIMSS	Foundation Funding ▾	<input type="text"/>	<input type="checkbox"/>
Funding from the local school district(s)	HIMSS	Funding from the local school district(s) ▾	<input type="text"/>	<input type="checkbox"/>
McKinney-Vento Homelessness Assistance Act	HIMSS	McKinney-Vento Homelessness Assistance Act Funds ▾	<input type="text"/>	<input type="checkbox"/>
Migrant Education Program	HIMSS	Migrant Education Program ▾	<input type="text"/>	<input type="checkbox"/>
Other	HIMSS	Other ▾	<input type="text"/>	<input type="checkbox"/>
Other Federal Sources of Funding	HIMSS	Other Federal Sources of Funding ▾	<input type="text"/>	<input type="checkbox"/>
Other State Sources of Funding	HIMSS	Other State Sources of Funding ▾	<input type="text"/>	<input type="checkbox"/>
Title I	HIMSS	Title I ▾	<input type="text"/>	<input type="checkbox"/>
* <input type="text"/>	HIMSS	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Save

HELPFUL LINKS

Make helpful websites and resources available for all users to access.

Add / Edit Helpful Links

1. In your left-hand navigation menu, click Settings > Program Settings
2. Locate the 'Helpful Links' card
3. Click 'Add / Edit Helpful Links'
4. Click Maintain Headings (e.g., Software Resources) to change the headings or add new sections.
5. Click Maintain Links (e.g., Parent Notices) to add, edit, or delete links to websites and online

The screenshot shows the 'Helpful Links' management page. The left navigation menu includes 'Settings' > 'Program Settings'. The main content area is titled 'Helpful Links' and shows a list of links organized into sections: 'Federal Resources' (containing 'Homeless Federal Website' and 'Title VII -B Homeless Assistance Act'), 'Software Resources', and 'Parent Notices'. At the bottom, there are two green buttons: 'Maintain Headings' and 'Maintain Links'. Red arrows point from these buttons to the 'Parent Notices' and 'Software Resources' sections respectively.

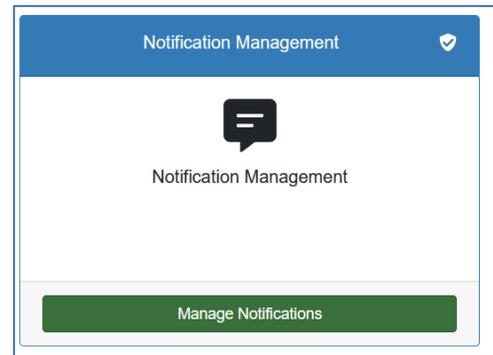


Tips

- Links to websites and specific resources may change over time. Review your helpful links at least annually to ensure the links are still valid.

NOTIFICATION MANAGEMENT

Manage email and HIMSS messages and who will receive them.



There are six standard notifications in HIMSS. These notifications are triggered by certain actions you take in the system or those that are triggered by changes in data in the file coming from your district's SIS each night.

Here are the notification types and the triggers that will generate the email and message:

Notification Type	What Triggers the Notification	Typically Sent to
New Homeless Student – SIS Data Share	When a nightly data file from your SIS is imported, if a Student ID is found that was not in the current list of students in HIMSS	<ul style="list-style-type: none"> • District Liaison
New Homeless Student	When a student record is first marked as "Approved" in HIMSS on the Homeless Student Data tab, and saved	<ul style="list-style-type: none"> • Assigned Service Contacts • Assigned Social Worker • School Staff
Homeless Student Withdrawal	In the nightly data file from your SIS, a Student ID is not present indicating they are no longer enrolled at a school in the district	<ul style="list-style-type: none"> • Assigned Service Contacts • Assigned Social Worker • School Staff • District Liaison
Homeless Student Transfer	In the nightly data file from your SIS, a Student ID is associated with a different school than the one they have in their current registration record	<ul style="list-style-type: none"> • Assigned Service Contacts • Assigned Social Worker • School Staff • District Liaison
Student Address Change	In the nightly data file from your SIS, if the student's address is different than the address they have in their current registration record OR If a student's address is changed in HIMSS on a student's Participant Information screen, and saved	<ul style="list-style-type: none"> • Assigned Service Contacts • Assigned Social Worker • School Staff • District Liaison
Assigned Social Worker Change	When a social worker assigned to a student is changed in HIMSS on the Homeless Student Data tab, and saved	<ul style="list-style-type: none"> • Newly Assigned Social Worker • Previously Assigned Social Worker

To view the pre-set notifications and/or to edit them, choose the Notification Management card (Settings > Program Settings > Notification Management) and click Manage Notifications.

Each row shows which notification type and who it will be sent to.

The screenshot shows the 'Notification Management' page with a table of 19 entries. The table has columns for 'Notification Type', 'To User', and 'To Security Level'. Each row includes edit and delete icons.

	Notification Type	To User	To Security Level
	Student Address Change		District Liaison
	Student Address Change		District Staff
	Student Address Change		Social Worker
	Student Address Change		Service Contact
	New Homeless Student - SIS Data Share		District Liaison
	New Homeless Student - SIS Data Share		District Staff
	New Homeless Student		District Liaison
	New Homeless Student		District Staff
	New Homeless Student		Social Worker
	New Homeless Student		Service Contact

To edit a Notification record, click the blue pencil icon.

To add a new Notification record, click green +Add button. The following screen will appear.

The screenshot shows the 'Add Notification' form. It includes a dropdown for 'Notification Type', a 'Send to Single User' dropdown, and a 'Send to Users with the following Security Level' dropdown. There are also text areas for 'Subject', 'Header', 'Body', and 'Footer'. A legend indicates that an asterisk (*) denotes a required field. At the bottom, there are 'Close' and 'Save and Close' buttons.

- Pick one of the six notification types.
Note the email Subject and Body have been filled for you based on the Notification Type. These are pre-defined in HIMSS and cannot be changed.

Notification Management

Set who should receive emails for the following notification type: * - Indicates a required field

Notification Type *
New Homeless Student - SIS Data Share

Send to Single User
Send to Users with the following Security Level

Subject
HIMSS - New Homeless Student

Header
Header

Body
One or more students have been added to HIMSS and require services. Please click this {{link}} to view more details in HIMSS.

Footer
Footer

Close Save and Close

- Decide who should get this notification – a single user or all users of a certain security level.

Send to Single User

Send to Users with the following Security Level

- State Admin 1
- State Admin 2
- District Liaison
- District Staff
- Social Worker
- Service Contact
- School-based Staff

*Note that if security level Service Contact and Social Worker are selected, all Users with that security level will not get the email – only those assigned to a student. For all other security levels, all Users with that security level will receive the emails.

Note: Notifications will only be sent out to users of the Social Worker security level for the students that they are assigned to.

- Complete the email Header and Footer to personalize the email for your program.

Subject
HIMSS - New Homeless Student

Header
Please review this important email.

Body
One or more students have been added to HIMSS and require services. Please click this {{link}} to view more details in HIMSS.

Footer
Thanks for your support of ALL of our students.
Mary Jones
MV District Liaison

- When finished click Save and Close and a new record will be created.

Important Notes about Notifications

If you want a notification to go to more than one User or security level, you will need to repeat this process for each user or security level to create their own notification record. The benefit of this is that you can customize the header and footer for each type of user that will be receiving the emails.

For example, when a District Liaison approves a newly imported student’s record in HIMSS, emails need to go to the assigned service contacts, the assigned social worker and possibly any other district staff. This is shown below. In this case, the District Liaison is sending an email to themselves perhaps to verify the system is sending emails as expected. Another notification could actually go to the school-based staff security level, so they know to keep an eye out for this student and be supportive in whatever capacity they play at the student’s school. Each notification’s header and footer can be customized for their recipient.

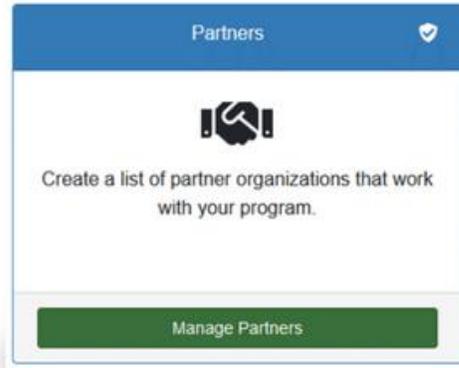
	Notification Type	To User	To Security Level
 	New Homeless Student		District Liaison
 	New Homeless Student		District Staff
 	New Homeless Student		Social Worker
 	New Homeless Student		Service Contact

Another example is that a change of address notification for a student is important to a transportation coordinator but may not be important to a nutrition service provider. So, the header or footer of an email to assigned Service Contacts Users may say something like “This may not impact you, but please be aware that a student’s address changed.”

Alternatively, you could create a “Student Address Change” notification record specifically for the individual Service Contact User associated with Transportation. In this way, the Service Contact for nutrition will not get an email. Note that if the individual Service Contact User associated with Transportation leaves their position or the district, no one will get those important emails until the new person is added as a Service Contact User.

PARTNERS

A partner is an outside organization that actively contributes to efforts to support youth experiencing homelessness. While the list of partners is created at the district level, actual contributions for those partners are recorded at the school site level.



Manage Partners

1. In your left-hand navigation menu, click Settings > Program Settings
2. Locate the Partners card
3. Click Manage Partners

Add Partners

1. Click + Add New at the top of the screen
2. Enter the Partner's information.
3. Click Save And Close

Partner	SubContractor
Ansonia Nature & Recreation Center	Yes
Boys & Girls Club of the Lower Naugatuck Valley	Yes
Hanson Landscaping	No
Junior Achievement of Western Connecticut	No
Parent Child Resource Center	Yes
Valley Regional Adult Education	No

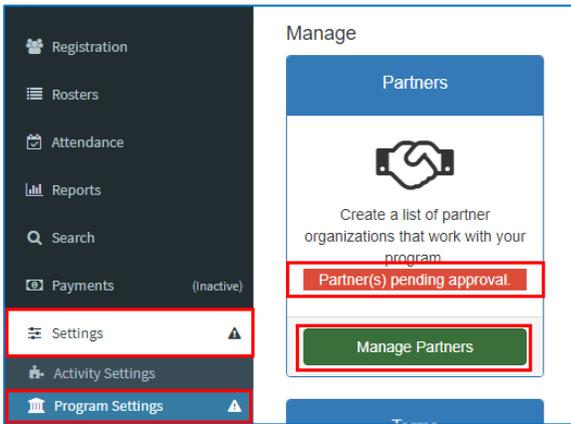


Tips

- School sites will record an actual contribution (amount, purpose, etc.). For partners making contributions to the program as a whole and not for only an individual school site, those contributions should be recorded in the Administration site.
- Try to avoid creating duplicate entries. This can lead to confusion if different sites begin to enter multiple partners when, in fact, there should only be one.

REVIEW PENDING PARTNER REQUESTS

If a site requests a new partner, an alert message will show on the Partners card to notify you that there are pending requests.



- ### Review Pending Partner Requests
1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
 2. Locate the 'Partners' card
 3. Click 'Manage Partners'

- ### Approve Pending Partners
1. Click the 'Pending' link to the left of the pending partner.
 2. Set the drop-down to 'Approved' if the Partner is new and unique to the program – be careful not to create duplicate records.

Partners

Purpose: Districts/grantees often report on collaborative participation by community organizations. Partners that are entered here can later be selected by a site as Partner Contributions with primary contribution types and amounts.

Sites can also request new partners. These requests will appear in the top of this list in red. The Partners button on the welcome screen will turn red when requests are pending. Determine whether the requested partner should be approved. Then notify the site staff that the partner has been added to the list, was already in the list (perhaps under a different name), or was not approved.

Instructions: To add a new partner, click on the 'Add New' button. To edit an existing partner record, click on the [edit](#) link. To delete an unused partner, click on the [delete](#) link. To approve pending partners, if there are any, click on the [pending](#) link to the left of the partner name.

Partner	SubContractor	Organization Type	Requested By	Request Notes
Pending Pizza Palace	No	BUS-Business	,	Donating pizza for opening and closing day events. delete
Hillandale Community Association	No	CBO-Community-Based Organization		details edit delete

SIS DATA SHARE

Settings for the data integration with your School Information System (SIS) are found in this section.

Only advanced users should modify these settings.

If you run into errors as indicated by a Failure in the Status column and a red highlighted row, you can view the issues by clicking the blue View Problems button. Please contact HIMSS support if you need assistance in addressing the listed problems.

We recommend suspending the sync when your district's SIS is being updated to a new school year. If the sync is not suspended and the homeless indicator for a student (or all students) is removed in the SIS, all students will be automatically withdrawn in HIMSS which will send out many automatic emails and cause general confusion!

Access to this District's SIS expires in 4 Years, 9 Months, 28 Days (12/29/2027).

Demo District Synergy Student Information System

Next SIS Sync: Begins at 03/02/2023 1:30 AM CT
SIS Sync Status: Completed at 03/01/2023 1:40 AM CT
ADP Status: Completed at 03/01/2023 1:50 AM CT

ACTIVE Settings Suspend Sync

Showing 1 to 211 of 211 entries

	Process	Status	When Completed	Critical	Warnings	Informational
View Problems	SIS Data Sync [#212]	Success	03/01/2023 1:50 AM (CT)	0	0	2
View Problems	SIS Data Sync [#211]	Success	02/28/2023 2:20 AM (CT)	0	0	2
View Problems	SIS Data Sync [#210]	Failure	02/28/2023 1:50 AM (CT)	1	0	0
View Problems	SIS Data Sync [#209]	Failure	02/28/2023 1:40 AM (CT)	1	0	0
View Problems	SIS Data Sync [#208]	Success	02/27/2023 1:40 AM (CT)	0	0	2

SITES

This is a list of school sites that participate in your district's McKinney-Vento program.

	Site Name	Site Code	Address
Actions	Administration Site	ADM	1
Actions	Bale Elementary School	BES	1003 Center St
Actions	Henderson Middle School	HMS	680 W Grage Ave
Actions	Jefferson Elementary School	JEF	50 Main St

School sites can be edited by going to Settings > Program Settings > Manage Sites. Click on the drop-down arrow next to the site name to edit the site.

Please note that if there is any data related to site, such as users or students assigned to the site, you will not be able to delete it. If the site is no longer part of your program, you can Edit Active Terms to make it inactive.

Note there is no “add site” option; if additional school sites need to be tracked in HIMSS, contact your TransACT HIMSS account manager.



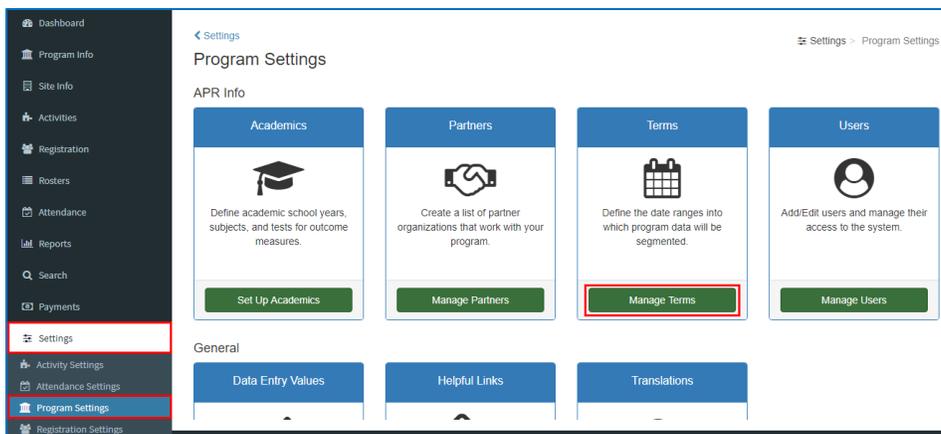
Notes

In addition to school sites, your database has been set up with an Administration (or Admin) site. This site is used to track adult participants, such as staff or parents/guardians, being served by your program. Services such as Professional Development for staff or Information Meetings for parents should be tracked within the Administration site. Also, partner contributions to your overall program can be added in this site.

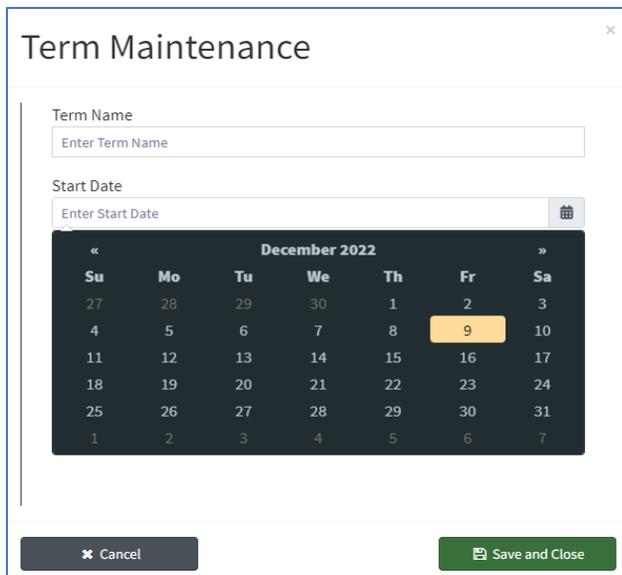
TERMS

Terms are used to define the date range for a current year’s program, typically starting around July 1 when a district’s SIS is updated for the new year (students are assigned new grade levels, placed in the current school and homeless indicators are removed from the previous year).

Each registrant record and activities/sessions are associated with a term. On the first date of a new term, lists of people and activities/sessions will be empty – don’t worry, they are not gone; they are simply in a previous term and you are looking at a new terms screens! You may view previous term data by changing terms in the Change Credentials menu.



- Manage Terms**
1. In your left-hand navigation menu, click ‘Settings’ → ‘Program Settings’
 2. Locate the ‘Terms’ Card
 3. Click ‘Manage Terms’



4. Click +Add New Term
5. Enter the ‘Term Name’ and choose the ‘Start Date.’
6. Click ‘Save and Close’

USERS

Any person that needs to access HIMSS must have their own login and password. System administrators are responsible for ensuring that users have the correct access to the system.



Manage Users

1. In your left-hand navigation menu, click 'Settings' > 'Program Settings'
2. Locate the 'Users' Card
3. Click 'Manage Users'

To Add a User:

1. Click +Add New
2. Enter the person's username, email, and name. A warning will appear if the email is associated with a different user to avoid duplicate users.

4. Set the Status Information and Access information including appropriate system type, district (if applicable), site (if applicable), and security level for the user, based on their job function/ responsibility. NOTE - if the **Service Contact** security level is selected, an additional field requiring a description of the service this user provides will appear. This description assists when a student record is approved to know which area (e.g., transportation) the service contact user can be of assistance to a student.
5. Click 'Save and Next'
6. The User record will save and offer the ability to add additional levels of Access with the '+ Grant Access' button. This will be used, for example, if a user needs access to more than one site, but not ALL sites. An access record can be made for each site – the user will switch between sites in the Change Credentials area.
7. When an additional access levels is created, be sure to click 'Save and Close.'

To **Edit** a User – User records can be edited to change security levels or site access or to disable the account if a user no longer should have access to the system (e.g., they quit or are terminated). Locate the user you wish to edit using the Search bar at the top of the screen.

1. Click the 'Actions' button and select 'Edit.'
2. Edit the user record as needed.
3. Click 'Save and Close' when finished.

Program Settings > Settings > Program Settings > Users

Users

Enter User's First Name, Last Name, Email, or Username Filter Search

[+ Add New](#)

Show 50 entries

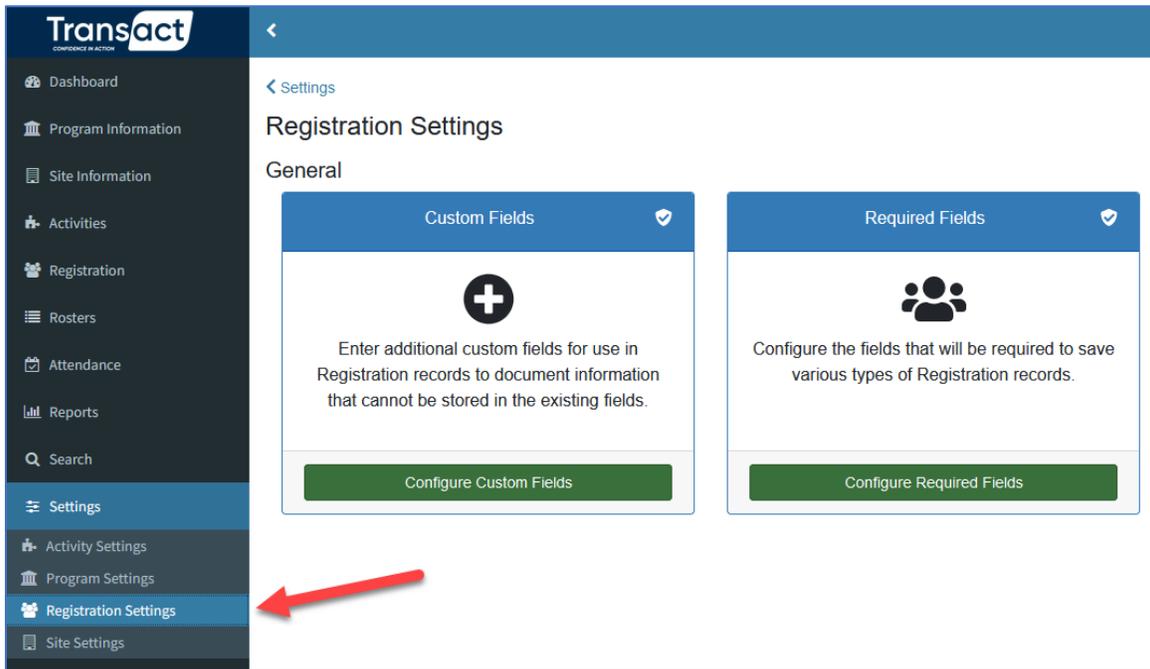
Showing 1 to 14 of 14 entries Refresh Copy Print Export

	Username	LastName	FirstName	Email	Last Login	Login Status	Expiration Date
Actions	cayenjd	Cayen	JD	cayenjd@aol.com	Never	Enabled	
Actions	servicecontact	Contact	Service	servicecontacthimss@yopmail.com	Never	Enabled	
Actions	STATE1	Director	State HIMSS	himssstate@yopmail.com	07/18/2022 1:13 PM (CT)	Enabled	
Actions	emilyhimss	HIMSS	Emily	emily.himss@transact.com	Never	Expired	1/31/2023
Actions	joyalea	Joyal	Emily	emily.transact@gmail.com	11/30/2022 12:02 PM (CT)	Disabled/Denied	



Notes

- Passwords can also be reset by an administrator – choose 'Reset Password' from the Actions button menu.
- Social Workers, School Staff and Service Contacts must have a user account created *BEFORE* any student records are approved in order for emails to be sent to them to begin services.
- A user cannot be **deleted** if they have ever logged into the system. However, if they shouldn't have access to the system, they can be **disabled**. Note the red highlighted rows in the image above have been disabled or expired.
- You can modify a user's access to districts, school sites, and/or security levels (at your access level or below only) by clicking Grant Access in the user's record and assigning additional values or by clicking the Remove Access button next to a specific access record.

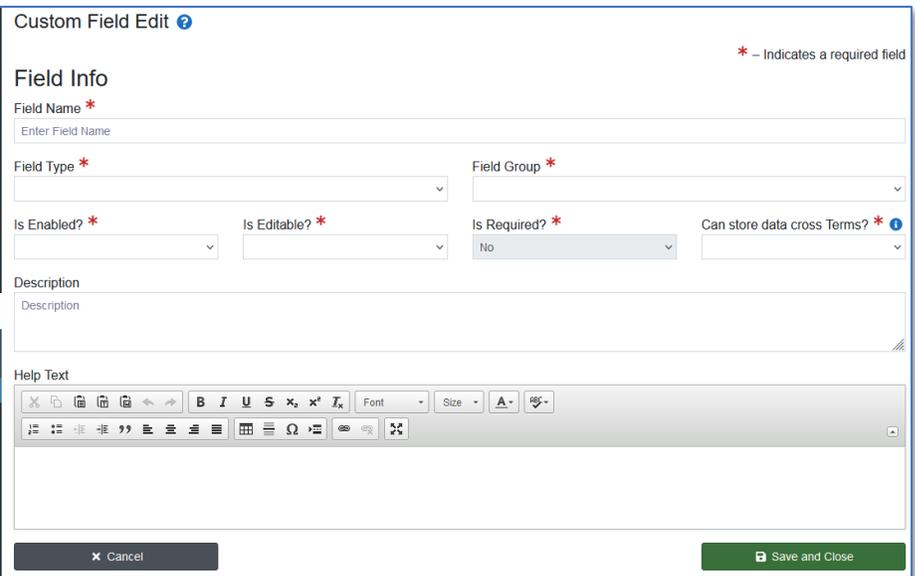
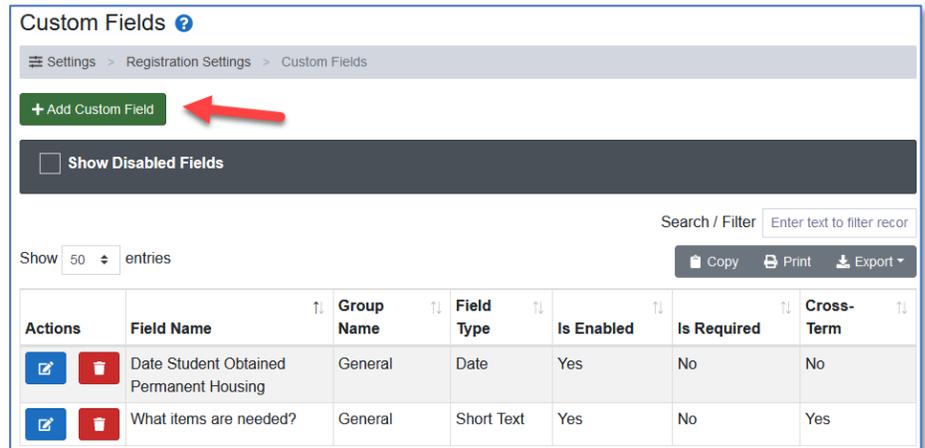
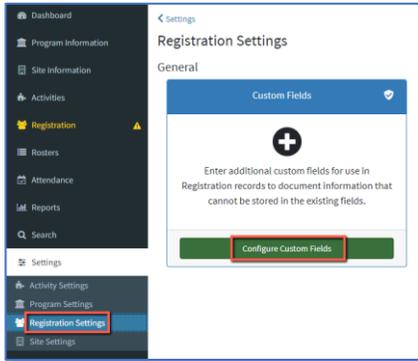


The next two areas of HIMSS setup can be found in Settings > Registration Settings.

- ✓ Custom Fields
- ✓ Required Fields

CUSTOM FIELDS

While HIMSS tracks considerable data about the people you serve, HIMSS allows you to create additional data fields unique to your initiatives. The fields you create in this setting area will appear in the Custom Fields tab of individual people's records and be available in search.



1. To create custom fields, go to Settings > Registration Settings and locate the Custom Fields card.
2. Click 'Configure Custom Fields'
3. Click '+ Add Custom Field' and the screen at right will appear
4. Enter required information, including Field Type which defines the values of the possible entered values.
 - If drop down or multi-select are selected, a Field Options section will appear at the bottom requiring you to define the values that must be chosen for that field
5. Complete all fields and click 'Save and Close' and the new custom field will appear in the list of Custom Fields



Notes

- Values for custom fields can be entered in an individual's registration record on in Search > Quick Edit
- Custom field data can be found and exported on the Custom Field Detail Report, the Custom Field Summary Report, or through Search.

REQUIRED REGISTRATION FIELDS

Use this feature to set the data entry requirements for new Registration records. A user who fails to enter data in all required fields will be unable to save the record; a prompt will appear notifying them which fields still require an entry.

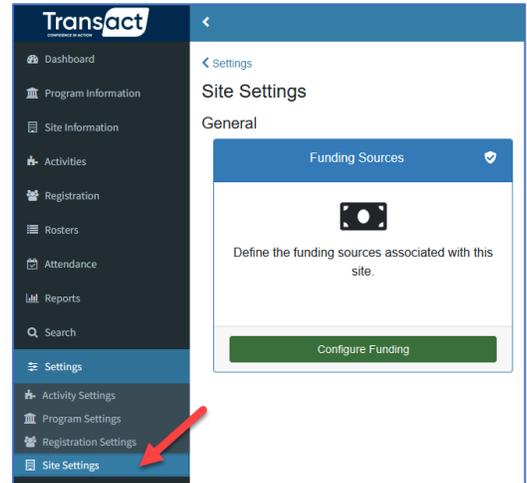
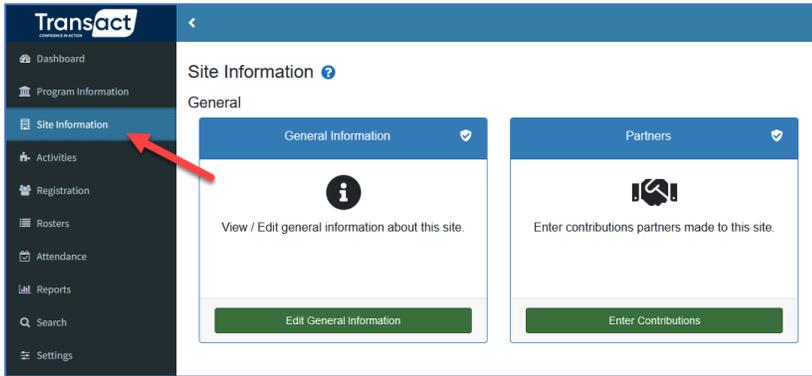
Note: Student will rarely, if ever, be entered manually. Thus, this feature mostly applies to adding adult records as parents/guardians or staff.

Configure Required Fields

1. In the left-hand navigation menu, click 'Settings' → 'Registration Settings'
2. Locate the 'Required Fields' Card
3. Click 'Configure Required Fields'
4. A list of all the fields that are in Registration will show, along with the types of participants (youth and adults)
5. Check the boxes under a participant type to mark a fields as required .
6. Click 'Save'

Registration Required Fields

Field Name	Registered Youth	Adult Attendee (Not Registered)
Adult Participant Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
At Least 1 Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Grade	<input type="checkbox"/>	<input type="checkbox"/>
Home Address	<input type="checkbox"/>	<input type="checkbox"/>
Home City	<input type="checkbox"/>	<input type="checkbox"/>
Home State	<input type="checkbox"/>	<input type="checkbox"/>
Home Zip	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Limited English Proficiency (LEP)	<input type="checkbox"/>	<input type="checkbox"/>
Lives With	<input type="checkbox"/>	<input type="checkbox"/>
Lunch Status	<input type="checkbox"/>	<input type="checkbox"/>
Mailing Address	<input type="checkbox"/>	<input type="checkbox"/>
Mailing City	<input type="checkbox"/>	<input type="checkbox"/>



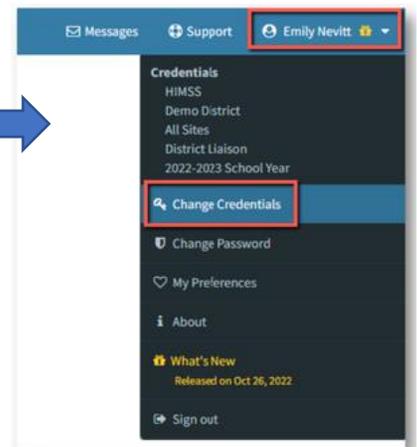
SCHOOL SITE INFORMATION

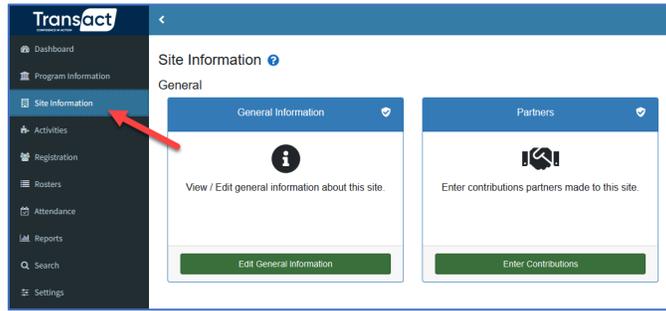
- ✓ General Information
- ✓ Partner Contributions
- ✓ Funding Sources

Three sections of Information specific to a single school site that need to be reviewed and occasionally updated in HIMSS. These sections are located in two main menu items: **Site Information** and **Settings > Site Settings**.

IMPORTANT NOTES ABOUT WORKING IN THESE SECTIONS

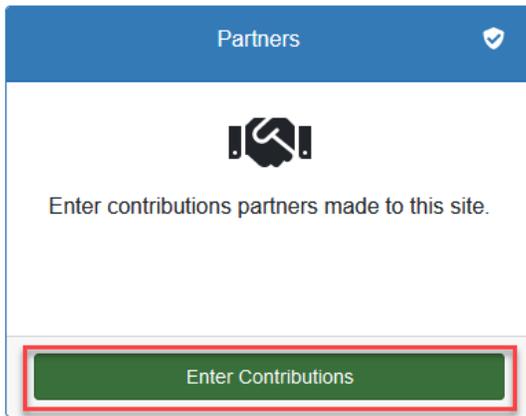
- Change Credentials and connect to a specific school site when modifying school site information. 
- While some system values may be the same across the entire program, Site Information must be configured for each active school site in HIMSS individually.





ADD / EDIT PARTNER CONTRIBUTIONS

Contributions made by partners to specific school sites can be documented here. Note that partners were added in the Partners card in Program Settings described above.



Enter Partner Contributions

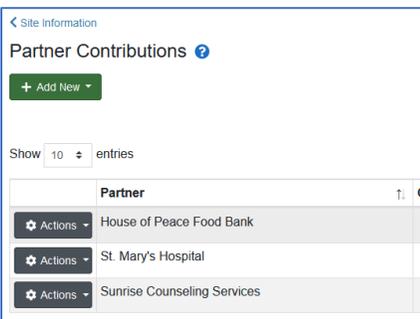
1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Partners' card
3. Click 'Enter Contributions'



Add a New Partner Contribution

First, the partner will be added to the list of the site's partners.

1. Click 'Add New' – or to save time, copy multiple partners from a previous term or site (see instructions on the next page)
2. In the pop-up screen that appears (at left), select a Partner from the drop-down menu.
 - o If the partner is not in the list, the partner can be added in the Program Settings > Partners area by District level users. If you are not a District level user, click the [Request New Partner](#) link, enter the partner, and a District program administrator will be prompted to review your request.
3. Click 'Continue' to add the selected Partner to the site's list of active partners.



4. A pop-up screen where contributions details can be entered will appear. Note, in addition to contributions, Documents (such as contracts or MOUs) and Notes can be added for this Partner.

5. Click the Add New button.

Editing a Partner to Add Additional Contributions

Partners can make multiple contributions during a Term. Use the Edit partner menu item under 'Actions' to access the Partner record and add additional Contributions, Documents, or Notes.

	Partner	Contribution Types	Total Contributions	Total Sub-Contract Amount
⚙️ Actions	House of Peace Food Bank		N/A	N/A
⚙️ Actions	St. Mary's Hospital		N/A	N/A
⚙️ Actions	Sunrise Counseling Services	Provided Evaluation Services	\$0.00	\$400.00
✏️ Edit Partner				
🗑️ Delete Partner				

Copying Partners

1. To save time, if the school site is working with the same partners from a different Term or Site, click 'Add New,' then 'Copy From Different Term' or 'Copy From Different Site'
2. From the drop-down, select the term or site from which you would like to copy partners
3. Check the box(es) next to the partner(s) you would like to add
4. Click 'Copy'
5. Then proceed per the above instructions to add contributions for those partners as well as add relevant Documents or Notes.

Site Information > Partner Contributions

Partner Contributions ?

+ Add New

Individual Partner

Copy From Different Term

Copy From Different Site

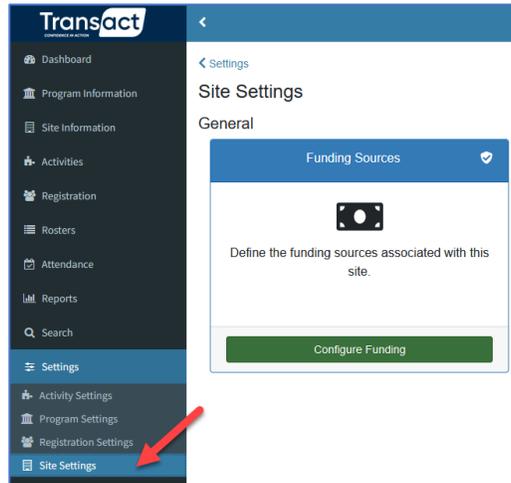
Search: _____

Refresh Copy Print Export

	Partner	Contribution Types	Total Contributions	Total Sub-Contract Amount
⚙️ Actions	Ansonia Nature & Recreation Center	Provide paid staffing	\$0.00	\$9,270.00
⚙️ Actions	Boys & Girls Club of the Lower Naugatuck Valley	Provide paid staffing	\$0.00	\$60,600.00
⚙️ Actions	Junior Achievement of Western Connecticut	Provide services/goods	\$0.00	\$1,000.00
⚙️ Actions	Parent Child Resource Center	Provide services/goods	\$0.00	\$1,250.00
⚙️ Actions	Valley Regional Adult Education	Provide services/goods	\$0.00	\$50.00

Showing 1 to 5 of 5 entries

< Previous 1 Next >



ADD/EDIT FUNDING SOURCES

By adding funding sources in this section, you can associate them to your activity sessions and generate reports for those specific funders.

Configure Funding

1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
2. Locate the 'Funding Sources' card
3. Click 'Configure Funding'

Funding Sources ?

Settings > Site Settings > Funding Sources

[+ Add New](#) [Copy District Values](#)

Funding Source [△]	District Funding Source	Description	Amount
Foundation Funding	Foundation Funding		edit delete
Funding from the local school district(s)	Funding from the local school district(s)		edit delete
McKinney-Vento Homelessness Assistance Act Funds	McKinney-Vento Homelessness Assistance Act Funds		edit delete
Other Federal Sources of Funding	Other Federal Sources of Funding		edit delete
Other State Sources of Funding	Other State Sources of Funding		edit delete
Title I	Title I		edit delete

Add Funding Sources

1. As funding sources for each School Site are typically the same, use the blue Copy District Values button to copy all funding sources set up by the District (in Data Entry Values) to this site
2. To add a funding source NOT in the District list, Click the green '+Add New' button
3. Enter the Funding Source name
4. Select the District Funding Source from the drop-down that most closely matches your newly entered funding source
5. Enter a dollar amount, if known
6. Click 'Save and Close'

Funding Source - Add New ?

Instructions: Note that the site and district may have different names for the same funding source. This function links the two. Enter the name of the funding source and then select the district's name for the same source. Enter a dollar amount and description. When you have finished, click on 'Save and Close.'

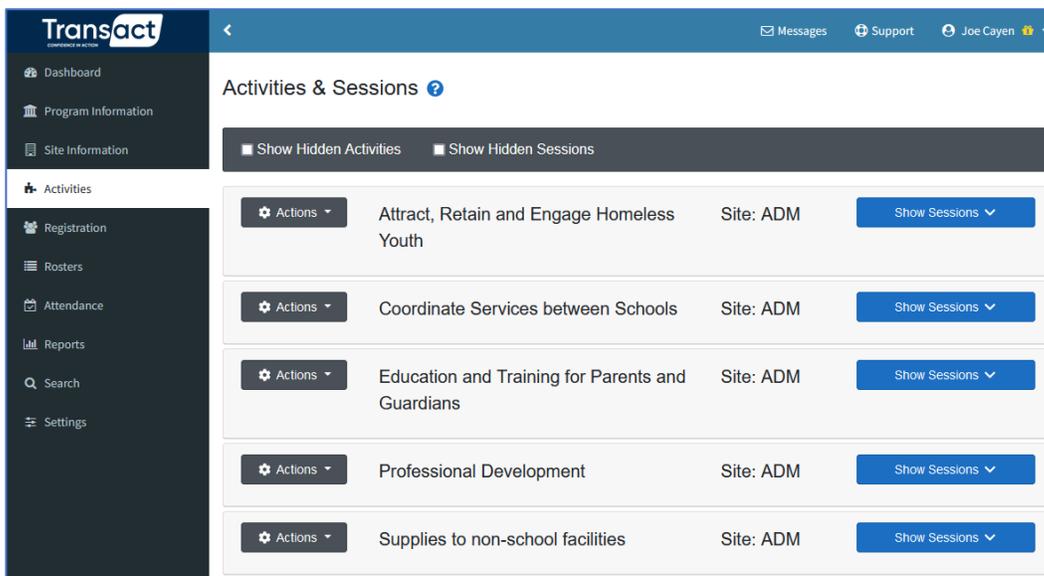
Funding Source:

District Funding Source:

Amount (optional):

Description (optional):

[Close](#) [Save And Close](#)



ACTIVITIES & SESSIONS

Activities are general programs and services offered at a school site for the benefit of students experiencing homelessness and their families. Sessions are sections of an activity offered for participants often with a different name and/or different dates or different times.

IMPORTANT NOTE: Use this section ONLY if you want to record the specific date and/or length of service an individual was provided this service. Otherwise, to simply record an individual received a service one or more times, use 'Services Provided' section of the Homeless Student Data section in a person's Registration record. In this section, we will cover:

- ✓ What are activities and sessions?
- ✓ Activities
- ✓ Sessions
- ✓ Copy an Activity

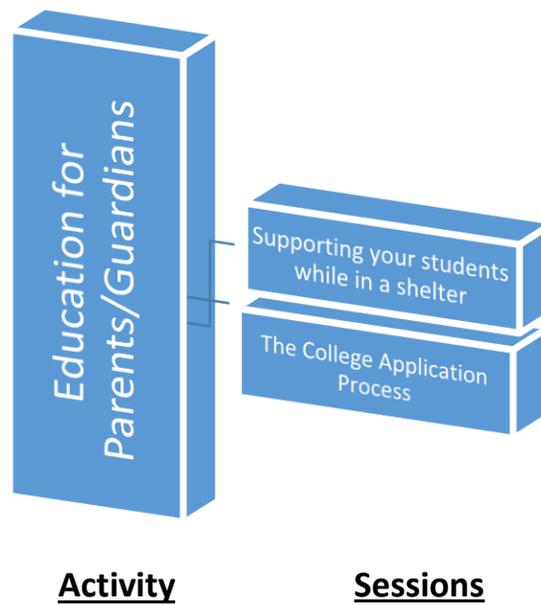
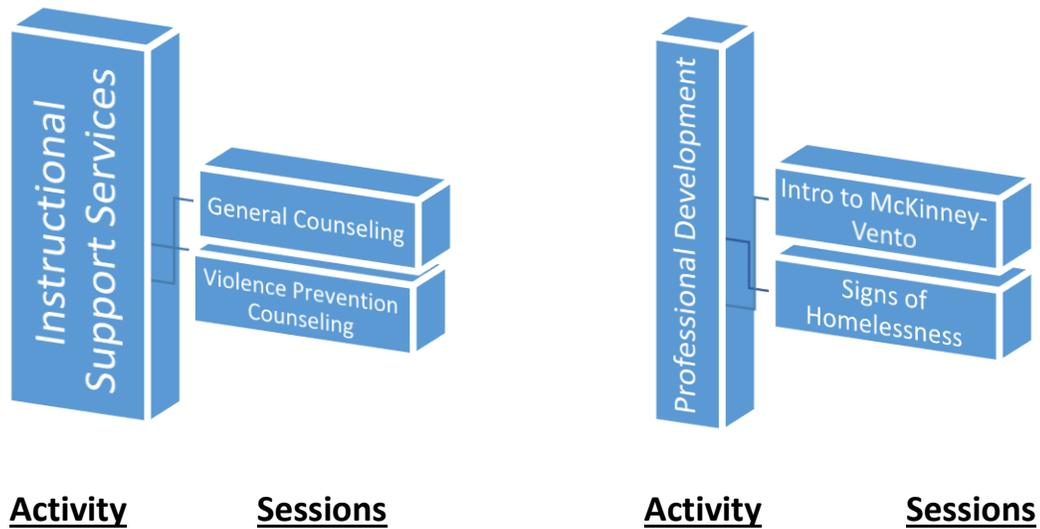
IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Activities are associated with one school site; thus, they must be created and edited while logged into that site.
- Funding Sources for the school site **must** be set up prior to adding Activities.
- Activities can be copied from one school site to another. However, site-specific information such as Partners or Funding Sources will need to be assigned to the Activity once it has been copied to another school site.

WHAT ARE ACTIVITIES AND SESSIONS?

When setting up your Activities and Sessions, think about the Activities being more of a broad service category and the sessions being more specific.

Below are a few examples of Activities and Sessions.



Here is how Activities and Sessions appear in HIMSS

Activities & Sessions ?

+ Add Activity ✕ Activity Tools ▾

Show Hidden Activities Show Hidden Sessions

Actions ▾ Coordination of Services between Schools/Agencies

Actions ▾ Education and Training for Parents and Guardians

Actions ▾ Efforts to Attract, Retain, Engage Homeless Youth

Actions ▾ Instructional Support Services

Actions ▾ Professional Development **Activity**

Session Name

Actions ▾ Introduction to McKinney-Vento ⓘ **Sessions**

Actions ▾ Recognizing Signs of Homelessness ⓘ

ACTIVITIES



To Add an Activity

1. In the left-hand navigation menu, click Activities.
2. Click '+Add Activity'

3. If you have offered Activities at this site in a prior term, a list of those Activities will appear. If you want to record participation this term in the EXACT SAME Activity as offered in the past, click on that Activity to add the Activity to the current term activity list.

OR

If you are offering an Activity that HAS NOT been offered at this site in the past, click 'Add New' at the bottom of the screen.

4. Enter any required information.
5. Click 'Continue' to save the Activity - the Add Session screen will then appear (see next page)

Add a prior-term activity or a brand new one to the term's list ?

Activities > Add Activity

Purpose: Use this page to view prior-term activities and select one if you will offer it again in the current term. By 'carrying forward' the details of the activity, you can guarantee the consistency of activity data from term to term. You may also add a brand new activity from this page.

Instructions: Review the list of activities below. To add/review a prior-term activity, find it in the list below and click on the name. If in examining the activity information, you would change key fields, you probably want to create a new activity instead. To add a new activity, click on 'Add New.'

Prior-term Activity	Description	Original term created
Coordination of Services between Schools/Agencies	Coordination between schools and agencies providing services to homeless children and youths in order to expand and enhance such services. Coordination with programs funded under the Runaway and Homeless Youth Act must be included in this effort. (Section 722(g)(5)(A)(i)).	2022-2023 School Year

Activity Information ?

Activity Name: (50 char max)	Professional Development
Activity Description: (1000 char max)	
1000 Character(s) Remaining	
Show in Activity List:	



Notes

- An activity cannot be deleted if there are any Sessions associated with it. Delete all Sessions and the Activity will also be deleted.
- If you have multiple sites that provide the same Activity, you can save time by using the Copy an Activity to Other Site(s) functionality (see Copy an Activity section below)

SESSIONS

Adding a Session

1. Under the Actions button for the desired Activity, click '+ Add Session'
2. The Add Session screen (at right) will appear.
3. Name the Session. The Session name will default to 'New Session.' Be sure to rename it with a useful name to avoid confusion later.
4. Complete all required fields including at least one date when this service may be offered by clicking on the calendar. If unsure of the date, select any date in the future. There may be other required fields – a prompt will appear when saving if they are not completed.
5. Click 'Save and Close'

Activity: Instructional Support Services **Add Session: New Session**

Session Name: Show in Session List: Yes No

Description:

Time-based: No Yes

Average hours:

/session/day:

Date: To

Shareable: Yes No

Funding Sources:
 Other Federal Sources of Funding
 Other State Sources of Funding
 Funding from the local school dist
 Foundation Funding
 Title I
 McKinney-Vento Homelessness As

Partners:
 House of Peace Food Bank
 St. Mary's Hospital
 Sunrise Counseling Services

Hold down CTRL (or Command) Key to select more than one

Select Multiple Days
 All Days
 All Sundays
 All Mondays
 All Tuesdays
 All Wednesdays
 All Thursdays
 All Fridays
 All Saturdays

Select Individual Days
 << < 03/15/2023 > >>
March 2023

S	M	T	W	R	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Today

Days Offered

Clear Dates

Cancel Save and Close Save and Build Roster

Adding Additional Sessions

1. More than one Session can be added to an Activity.
2. From the Activities screen, find the Activity to which you need to add a session
3. Click the 'Actions' button next to the Activity name
4. Click 'Add Session'
5. Complete all fields
6. Click 'Save and Close'

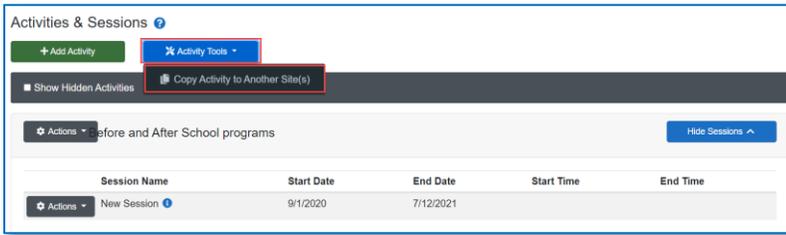


Tips

- Be sure to select the appropriate funding source and partner for each session.
- If you would like to track the exact amount of time a participant received this service, choose 'Yes' for the Time-based field on the Session edit screen.
- If you do not want HIMSS users at other sites (should the student be transferred) to see which participants have received this service, select 'No' for the Shareable field.
- If multiple similar sessions are being offered for an Activity, it may be easier to Copy the Session and edit the copy rather than creating a whole new Session from scratch. Select 'Copy Session' under the Actions button to the left of the Session name.
- A Session cannot be deleted if any attendance has been recorded for it.

COPY AN ACTIVITY

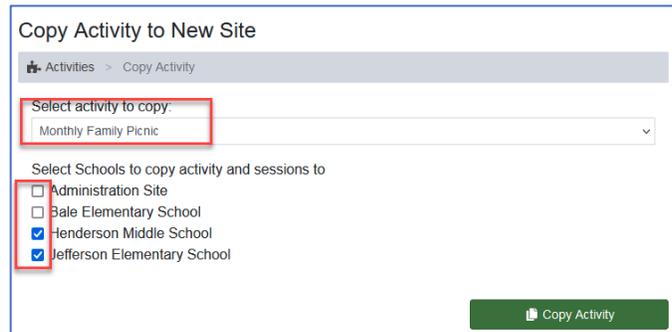
Use this time-saving functionality to copy an activity to one or more school sites.



To copy an activity to other school sites

1. In your left-hand navigation menu, click 'Activities'
2. Click 'Activity Tools' and select 'Copy Activity to Another Site(s)'

3. Select the Activity that you wish to copy
4. Check the box(es) for the Site(s) to which the activity should be copied
5. Click 'Copy Activity'



The following information will not be copied:

- Funding Sources
- Session Leaders
- Rooms

Go to the new site(s) and add the information for each activity copied.

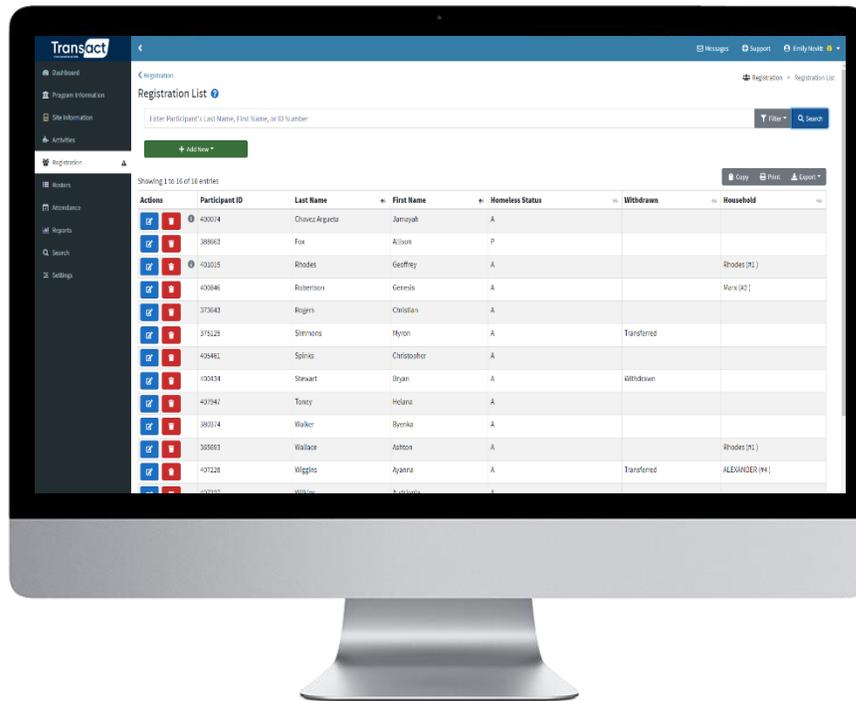
OK

6. A window will open, reminding you that not all information will be copied
7. Click 'OK'
8. Once you are done copying Activities, go to each site (use the Change Credentials feature) and update the Activity/Session information as needed

9. If you have more Activities to copy, click 'Copy Another Activity'

Activity has been copied successfully.

Copy Another Activity



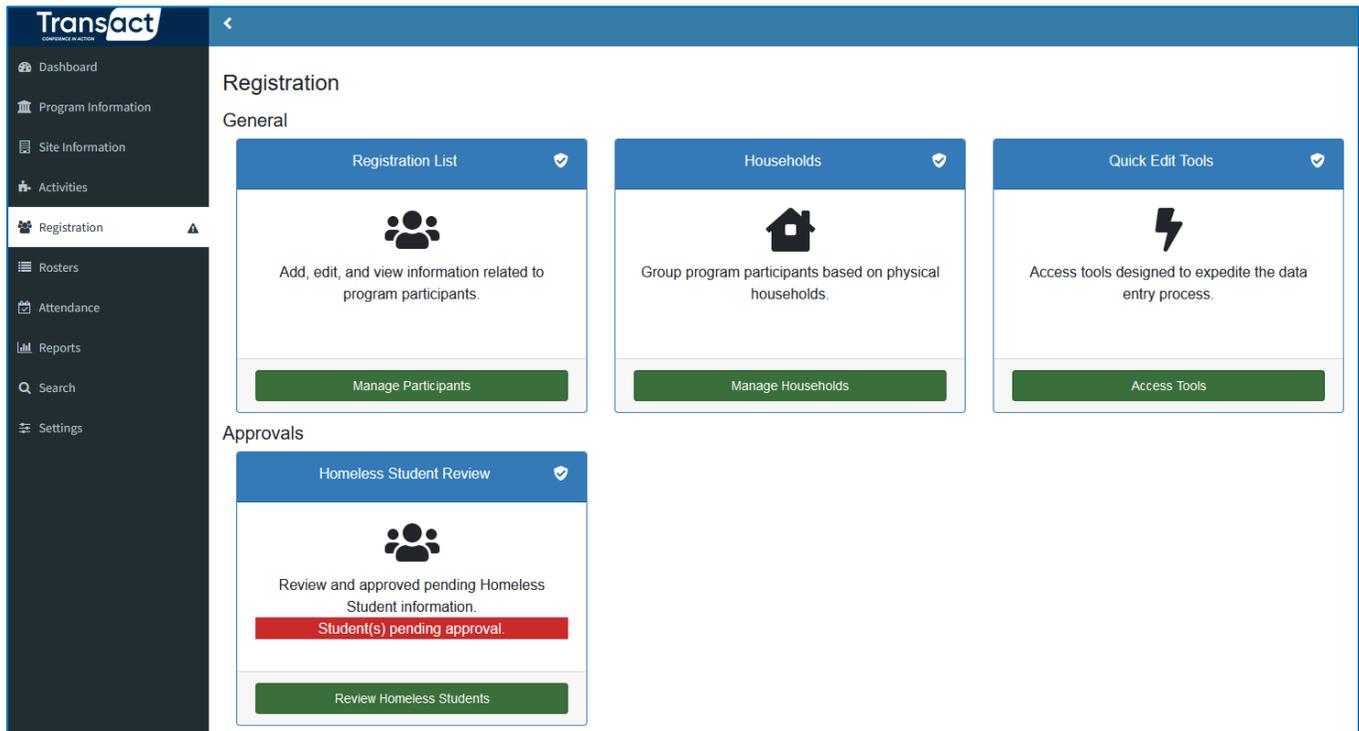
REGISTRATION

Information related to students and parents/guardians being served at a site is found in Registration. Demographics, homeless information, notes, documents, referrals, services received, and more can be recorded and stored in each Registration record. This section will cover these key sections.

- ✓ Registration Overview
- ✓ Homeless Student Data
- ✓ Withdrawal & Transfer History
- ✓ Notes / Goals
- ✓ Documentation
- ✓ Referrals
- ✓ Program Attendance

REGISTRATION OVERVIEW

Information about student and adult (parents and staff) participants is stored in this section.



There are four cards on the Registration section.

1. Registration List / Manage Participants is the most used area of Registration section
2. Households / Manage Households allows the connecting of individual persons together
3. Quick Edit Tools / Access Tools allows for faster editing of participant records
4. Homeless Student Review / Review Homeless Students – this is the starting place for approving the HIMSS records of a newly identified students experiencing homelessness. This area is described in the Manage Participants section of this chapter.

MANAGE PARTICIPANTS

To manage the people in the HIMSS system, click Manage Participants in the Registration List card.

5. To locate a participant, use the search bar or click 'Search' with no value in the search bar to see all participants.
6. To edit a record, click the blue pencil icon in the Actions column to the left of their name.
7. To delete a person, click the red trash can icon. Note that a person cannot be deleted if they have any records associated with them.

Registration List

Enter Participant's Last Name, First Name, or ID Number Filter Search

+ Add New

Showing 1 to 16 of 16 entries Copy Print Export

Actions	Participant ID	Last Name	First Name	Homeless Status	Withdrawn	Household
	400074	Chavez Argueta	Jamayah	A		
	388663	Fox	Allison	P		
	401015	Rhodes	Geoffrey	A		Rhodes (#1)

1. The first tab that will open is the Homeless Student Data tab (below). Here is where services can be initiated for a student in need. It is also where staff can update the services provided to this student.
2. Participant demographics are found on the **Participant Info** tab. Most of these demographics are imported from your school district's SIS system. Be careful changing them as they may be overwritten the next time data is imported which is typically nightly.
3. Additional data can be located on the other blue tabs within the Registration record.
4. After making any edits on any tab, be sure to click 'Save'

Participant Information

Rhodes, Geoffrey T

- Homeless Student Data
- Participant Info
- Withdraw/Transfer History
- Custom Fields
- Emergency Info
- Notes & Goals
- Documentation
- Referrals
- Program Attendance
- Program Rosters
- Surveys
- Standardized State Test Scores

Homeless Student Data

Homeless Approval Status: **Approved**

Date Reviewed: 6/9/2022

Date Submitted: 6/9/2022

Migrant: No

Unaccompanied Youth: Yes

Has Disability (IDEA): No

English Language Learner: No, Proficient in English

Social Worker/Liaison: Stone, Marianne

Source of Information: Teacher/School Staff Referral

Primary Nighttime Residence: Doubled-up **Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason.**

Homeless Reason

- Financial hardship
- Abandoned
- Previous housing was substandard / inadequate
- Natural Disaster (ex: fire, hurricane, tornado, etc.)
- COVID 19
- Migratory lifestyle
- Moving from place to place / "couch surfing"
- Runaway/Homeless Youth Shelter (even if parent invites youth home)
- Loss of Housing
- Data Missing

Services Provided: (select all that apply)

- Before and After School Services
- Early Childhood Education Programs
- Expedited Evaluations
- Extraordinary or Emergency Services
- Instructional Support Services, including Violence Prevention Counseling, & Referrals
- Payment of Costs Associated with Needed Documents

Close Print Record Save

HOMELESS STUDENT DATA

Data specific to a student's situation related to experiencing homelessness is collected here.

When a student experiencing homelessness is identified by a person in the District, their student record in the district SIS is flagged. All students with such flags have their name and other information imported nightly into HIMSS.

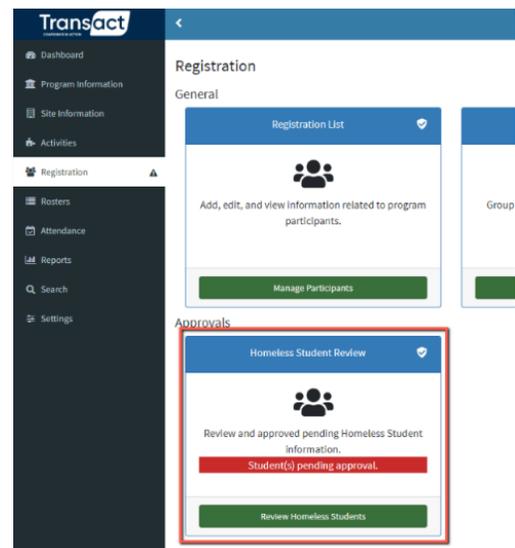
It is **then essential** to approve a student's record in HIMSS. The student's homeless status is not being approved, the HIMSS record is. This is essential to take advantage of the HIMSS communication system and gather data for reporting.

Here are the reasons why saving and approving a student record is vital to a student's success:

1. A **social worker** will be assigned to the student and be sent an email indicating they have a new student to work with.
2. Those in the district that can **provide services** (namely school nutrition and transportation) can be notified of the newly identified student's needs
3. **Data can be recorded** about a student that can be used for reporting and program improvement including:
 - a. Primary Nighttime Residence
 - b. Reason for Homelessness
 - c. Barriers to receiving the services they need
 - d. Source of information (how the student was identified initially)
 - e. Documents on file

How to Approve a Pending Student Record in HIMSS

From the Registration main menu item, in the Homeless Student Review card, click the green Review Homeless Students. Note the red notification that says Student(s) pending approval – if this red notification is not present, no new flagged students have been imported from the SIS.



A filtered registration list of pending students (as indicated with a P in the Homeless Status Column) will appear.



Actions	Participant ID	Last Name	First Name	Homeless Status	Withdrawn	Household	Site
 	388663	Fox	Allison	P			Bale Elementary School

Click the blue pencil icon to open the student's record (image at right).

Some information, such as Primary Nighttime Residence, may have been imported from your district SIS.

Change the Homeless Approval Status to 'Approved.' Then, complete as much information as possible based on data you have available.

Be sure to assign a social worker and one or more service contacts. Social worker and service contacts (for transportation, nutrition, etc.) are HIMSS users that can be set up as described in the User section above.

Service contacts are Users that you add to the system with the "Service Contact" security level. You record the service type when the User account is created.

When the record is saved, emails will be triggered to notify the assigned social worker and other assigned service contacts for nutrition, transportation, etc.

Participant Information
Fox, Allison D

Homeless Student Data

Homeless Approval Status: Pending Approval

Date Submitted: 4/9/2022

Migrant: No

Unaccompanied Youth: Yes

Has Disability (IDEA): No

English Language Learner: No, Proficient in English

Social Worker/Liaison: Stone, Marianne

Source of Information: Teacher/School Staff Referral

Primary Nighttime Residence: Doubled-up

Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason.

Homeless Reason

- Financial hardship
 - Abandoned
 - Previous housing was substandard / inadequate
- Natural Disaster (ex: fire, hurricane, tornado, etc.)
- COVID 19
- Migratory lifestyle
- Moving from place to place / "couch surfing"
- Runaway/Homeless Youth Shelter (even if parent invites youth home)
- Loss of Housing
- Data Missing

Services Provided: (select all that apply)

- Before and After School Services
- Early Childhood Education Programs
- Expedited Evaluations
- Extraordinary or Emergency Services

Participant Information
Fox, Allison D
Bale Elementary School

Homeless Student Data

Birth certificate

- Birth certificate
- Academic records, including documentation for credit transfer
- Immunization/Other Health Records
- Proof of residency/residency forms

Service Barriers: (select all that apply)

- Absences
- Enrollment Waiting List
- Fines or Fees
- Records Requested
- Referred to Other Services
- Transportation

Migrant: No

Unaccompanied Youth: No

Has Disability (IDEA): No

Service Contacts to Notify for this Student

- Kaylee Stevens - Clothing Contact (kaylee123@schooldistrict.com)
- Service Contact - Transportation (servicecontact@schooldistrict.com)
- Test Socialworker - Out-of-District Transportation (testsocialworker@transact.com)

Comments:

WITHDRAW & TRANSFER HISTORY

This section shows a history of the student's transfers between schools and withdrawal from the district

When a new set of student data is imported from your district's SIS to HIMSS, new and current school data for current students in HIMSS is compared.

If a newly imported student record shows a student at a different school than their current HIMSS record, the new school will be updated in the student record and a Transfer recorded on this screen. A Withdrawal is shown when a current HIMSS student record is no longer included in the data import.

Rhodes, Geoffrey T
Jefferson Elementary School

Withdrawal History for Rhodes, Geoffrey T

Purpose: Use this page to view the withdrawal requests made for this participant. Each request is listed in its own table, and additional information about the status changes for that request are listed below.

Instructions: View the information on the screen, or use the 'Print' button to print the information.

Withdrawal Request Date	Reason	Notes
06/08/2022 2:31 PM	Transfer	

Date	Status	Reason (if changed)	Notes (if changed)	Transferred	Original Site	New Site
6/8/2022	Pending			No	Jefferson Elementary School	
6/8/2022	Approved			Yes	Jefferson Elementary School	Bale Elementary School

NOTES & GOALS

This section allows the entering of case notes, tracks progress toward goals for individual students and records communications related to the student (for example between staff and teachers or parents).

Entering Case Notes

1. Click 'Notes & Goals'
2. Click 'Add New'
3. In the pop-up that appears, enter the note date, if the note is shareable with other sites and the note itself.
4. Click 'Save and Close' and the note will appear in the list of Notes.

Registration List > Registration List > Participant Information

Participant Information

ALEXANDER, SIMON A

Participant Info
Enrollment
Documentation
Emergency Info
Withdraw/Transfer History
Attendance
Notes/Goals
Surveys
Behavior
Suspensions
Custom Fields
Homeless Student Data
Referral Documentation

Notes Goals Messages & Contact Notes

Notes [Add New](#) [Print Notes](#)

Date

Note

Registration > Registration List > Participant Information

Notes **Goals** Messages & Contact Notes

Goals [Add New](#) [Print Goals](#)

Date Set Last Updated Goal Date Completed

Entering Goals

1. Click 'Notes/Goals'
2. Click the 'Goals' tab
3. Click 'Add New'
4. In the pop-up that appears, enter the date the goal was set, if the goal is shareable if the student is transferred, the details of the goal, and the date the goal was completed (if applicable)
5. Click 'Save and Close' and the goal will appear in the list of Goals.

Entering Messages & Contact Notes

1. Click 'Notes/Goals'
2. Click the 'Messages & Contact Notes' tab
3. Click 'Add New'
4. In the pop-up that appears, enter the date and time of the message, if the message is shareable with those at other sites is the student is transferred, the person contacts, the subject and what was communicated (the message)
5. Click 'Save and Close' and the message will appear in the list of Messages.

Registration > Registration List > Participant Information

Notes Goals **Messages & Contact Notes**

Messages & Contact Notes [Add New](#) [Print Messages/Contact Notes](#)

[View Contacts' Information](#)

Date	Person Contacted	Subject	
8/22/2022	Geoffrey Rhodes	Discussed Supplies Needed for School	edit delete
8/8/2022	Mother	Verification of eligibility 2022-23	edit delete
6/9/2022	Family Meeting	Check-in	edit delete



Notes

Notes, Goals and Messages can be made confidential and thus not visible at other school sites if the student is transferred. This can be done by changing the Shareable field to 'No.'

DOCUMENTATION

HIMSS can store important electronic documents for individuals.

Rhodes, Geoffrey T		Documentation				
Homeless Student Data	Name	Type	Shared	Date Uploaded	Uploaded By	
Participant Info	Immunization Record	Immunization Record	No	6/7/2022 6:26:21 PM	Smith, Philip	download edit delete
Withdraw/Transfer History	Proof of Residency	Proof of Residency	No	6/7/2022 6:26:48 PM	Smith, Philip	download edit delete
Custom Fields	Birth Certificate	Birth Certificate	No	6/7/2022 6:27:18 PM	Smith, Philip	download edit delete
Emergency Info	District Enrollment Form	District Enrollment Form	No	6/7/2022 6:27:43 PM	Smith, Philip	download edit delete
Notes & Goals						
Documentation						
Referrals						
Program Attendance						
Program Rosters						
Surveys						
Standardized State Test Scores						

To Upload a Document

1. Click 'Documentation'
2. Click 'Upload New File'
3. Browse to file on your computer
4. Change the name if you'd like.
5. Select the type of file (this list of types can be edited in Settings > Program Settings > Data Entry Values)
6. Enter the date.
7. Choose if you'd like the file to be viewable by those at other sites using the 'Shared' field.
8. Add any notes about the document.

REFERRALS

HIMSS can record student referrals to other agencies.

Rhodes, Geoffrey T		Referral Documentation						
Homeless Student Data	Instructions: To add a new referral documentation, click on the "Add New" button. To edit an existing referral documentation record, click on the edit link. To delete a referral documentation, click on the delete link.							
Participant Info	Referral Date	Referring Person	Service Partner	Follow-up Scheduled	Follow-up Completed	Reason of Referral	Shared	
Withdraw/Transfer History	6/3/2022	Smith, Philip	St. Mary's Hospital	6/28/2022	No	Services needed	No edit delete	
Custom Fields	8/14/2022	Smith, Philip	Other	9/10/2022	Yes	Services needed	No edit delete	
Emergency Info	8/29/2022	Smith, Philip	Child Protective Services	11/16/2022	Yes	Services needed	No edit delete	
Notes & Goals								
Documentation								
Referrals								

To Add a Referral

1. Click 'Referrals'
2. Click 'Add New' and a popup will appear.
3. Enter in the required information including Service Partner (the list of Service Partners can be edited in Data Entry Values)
4. Be sure to enter a date for a follow-up.
 - o This is the date that the person entering this referral should follow-up with the student or his/her family to see if they received services from the listed Service Provider. A Follow-up Report in the HIMSS report section can be printed each week to know who to follow-up with.
5. Click Save & Close

Note, this form can be accessed later by clicking the [edit](#) link. This should be done to record if a follow-up was completed and what the outcome of the referral.

Referral Documentation Details

Referral Documentation for - Rhodes, Geoffrey T

Date of Referral:

Staff Name:

Staff Phone:

Staff Email:

Reason For Referral:

Service Partner:

Subject of Referral:

Follow-up Scheduled:

Notes:

Did family follow up on referral:

Follow-up Completed:

Outcome of Referral:

Participant's Phone Number: Name: Geoffrey Rhodes, Phone: 501-551-5999

Shared:

PROGRAM ATTENDANCE

Track the services an individual participant receives by recording attendance on the Program Attendance tab.

There are several ways to record the provision of services in HIMSS.

1. To track each date an individual participant receives a service, use this Program Attendance tab (details below)
2. To track each date more than one participant receives a service, use the Main Menu Attendance section (details in the Attendance section later in this guide.)
3. To track that a participant received a service when the service date or time or how many times they received the service is not important, use the ‘Services Provided’ checkboxes in the Homeless Student Data tab (see above).

The Program Attendance tab screen below shows a listing of all services received by an individual. The list can be sorted and printed. Individual attendance records can also be edited which will enable seeing any notes that were recorded for the date of service.

Rhodes, Geoffrey T
Attendance

Purpose: View this participant's attendance at this site, other sites, and potentially other programs tracked through APlus. You may also add attendance dates and generate an attendance summary by program type and date range.

Instructions: To filter attendance, change the selections in the dropdown(s) at the top of the attendance list. To page through attendance records, use the page number links. To sort the list, click on a column heading or the sort direction symbol next to the column heading. To print all or part of the attendance list, click on 'Print.' Attendance records for this site will show in green, attendance records for other sites (and this same system) will show in blue, and attendance records for other systems will show in purple.

Add Attendance
Attendance Summary Counts

Site:
Term:

Date	Site	Activity	Session	Has Note	
03/07/2023	BES	Monthly Family Picnic	March Family Picnic		edit delete
03/07/2023	BES	Instructional Support Services	Violence Prevention Counseling	✓	edit delete
03/07/2023	BES	Instructional Support Services	General Counseling		edit delete
05/30/2022	BES	Instructional Support Services	Violence Prevention Counseling	✓	edit delete

To Track a Date-Specific Service to an Individual

1. Click the blue ‘Program Attendance’ tab in a person’s Registration record.
2. Click ‘Add Attendance’ – the screen at right will appear.
3. Enter the date the service was provided
4. Select the appropriate Activity and Session
5. Select a program staff member (optional)
6. Enter any notes about the service on this date
7. Click ‘Save and Close’

Attendance Details for Rhodes, Geoffrey T

Attendance Date:

Select an Activity:

Staff:

Notes:

Close
Save and Close

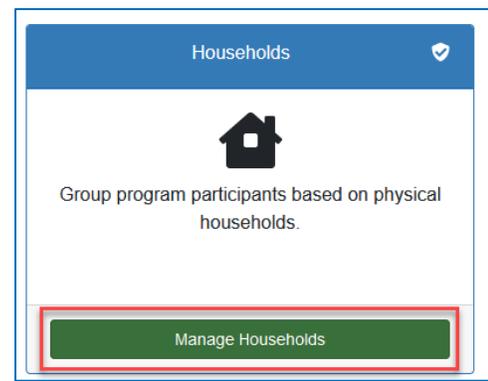
MANAGE HOUSEHOLDS

Use this section to group students and parent/guardians into Households.

A few benefits of using households are:

- If services are tracked in the HIMSS attendance section, the Family Participation Report can be generated. This report shows how many hours of service individuals in the household have received as well as how many the family as a total have received.
- If there is a change to one member's address or contact information, all members' info can be changed instantly
- Data about adults and students being served and their outcomes may be useful to program evaluators to improve program quality and effectiveness

To manage Households, click the green Manage Households button in the Households Card.



Follow these steps to create or edit a household

1. Search for participants by name or ID; note typing "a" will show all persons with a first or last name starting with "a"
2. Review the Search Results and click Select for the participant whose information you wish to view
3. View Household Details at the right and either create a household (if there is no HouseholdID listed for that person) or edit an existing household

Household ⓘ

Purpose: Add, modify or review household details and members.
Instructions: Search for a participant. Select a participant from the list to view the household details that they are associated with. Within the details, the user can modify or add household details and members. Select the name of a member within the household to view their details.

Step 1: Find Participants

Search for Household by Member:
ac

Search for Household by ID:

Step 2: Search Results

Last Name	First Name	Household ID	
Acevedo	Abel	2269	Select
Aceves	Stephanie		Select
Aceves Mitre	Yecenia	1088	Select
Acosta	Angelique	1570	Select
ACOSTA	MICHELLE	999	Select
ACUNA	KELLY		Select

Step 3: Household Details

Details | Members | Messages/Contacts

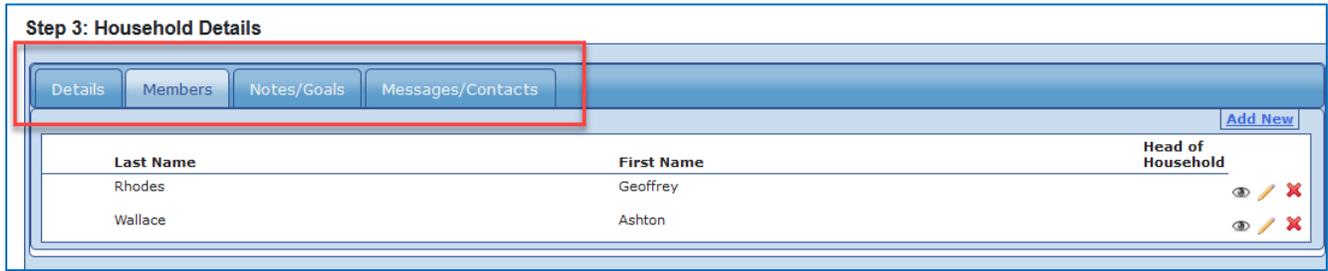
Household ID:
Household Name: Aceves | Number in Family: 1

Would you like to create a new household?

Create | Cancel

Close | Save

There are various sections of each Household record.

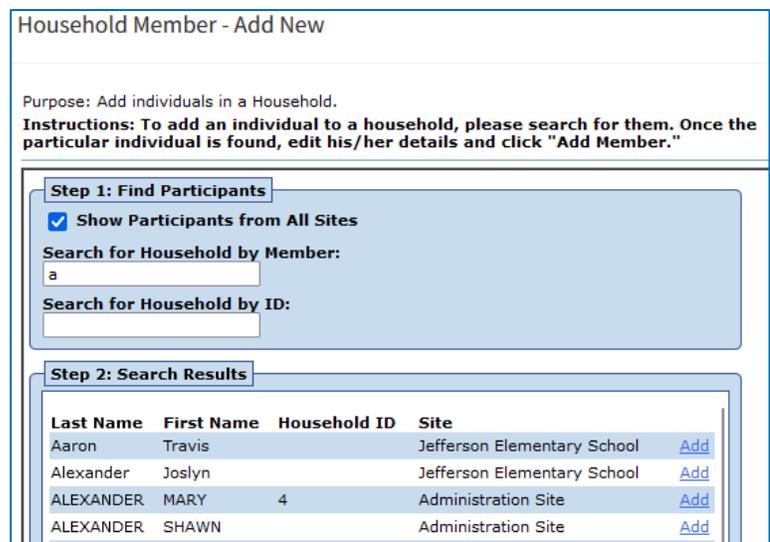


The above screen shows the current Members of the Household. Use the eye icon to view a summary of the person. Use the pencil icon to edit household information for that person and use the red X to remove the person from the Household.

Use the [Add New](#) link to add a new member to the Household.

To find and put adults (remember, adults are only registered in the Administration site) or students from other school sites into this household, be sure to check the "Show Participants from all Sites" box.

Locate the person by searching by name or HouseholdID to add to the Household and click [Add](#).



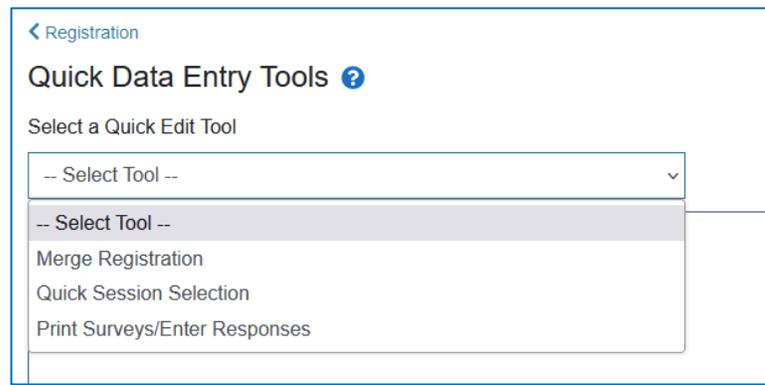
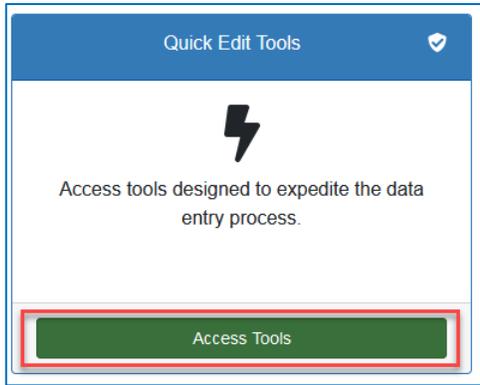
Note if trying to add an adult member and the adult is not found, use the Change Credentials feature to switch to the Administration site and add the adult to HIMSS in the registration area. You may then add the students to the Household from the Administration site where the adult record is saved, or you can change credentials and return to the school site where the student record is located.

After clicking [Add](#), a summary screen will appear. Click the green Add Member button and be sure to click the green Save button at the bottom of the screen to complete the process.

Notice the Notes/Goals and Messages/Contacts tabs in the red box in the image at the top of this page. While there are Notes, Goals, Messages/Contacts for individuals in the Registration section, these Note/Goals and Messages/Contacts are for the household. Be sure to always click the green Save button at the bottom of the screen after making any changes to data on these tabs.

QUICK EDIT TOOLS

Use these three tools to make quick work of various system tasks.



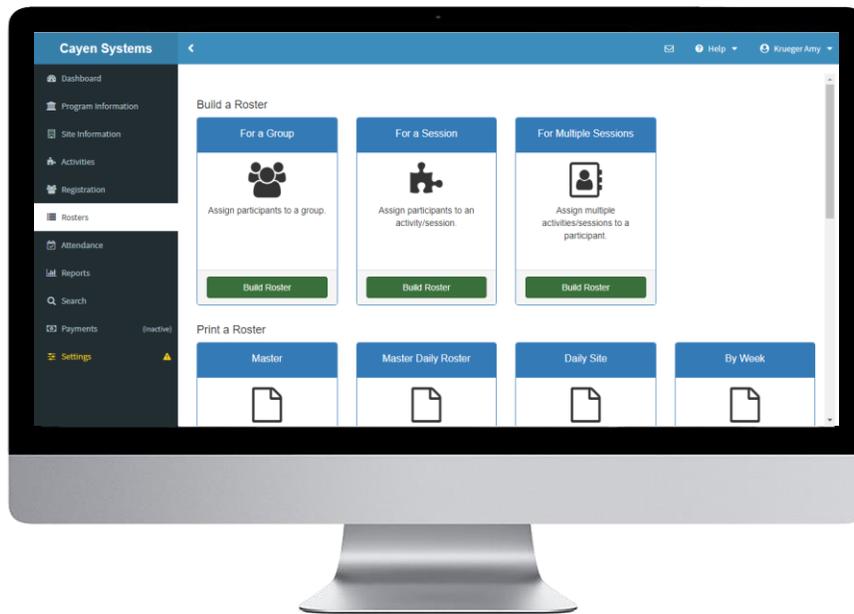
Enter this section by clicking on the Access Tools button in the Quick Edit Tools

Select a tool to use:

Merge Registration. Sometimes two people records are created for the same adult. Once a record has certain data associated with it (e.g., attendance), it cannot be deleted. Use this tool to merge the two records together.

Quick Session Selection. Use this tool to quickly add an individual to multiple activity session rosters (see Rosters Chapter below for more information on using rosters).

Print Surveys/Enter Responses. Use this tool to quickly enter individual survey results from paper survey responses. It can also be used to print surveys as well.



ROSTERS

If your program offers services for groups of students or adults at one time, the HIMSS Rosters feature may be helpful. Common uses of Rosters are to record the names of those attending a professional development activity for district staff or a parent information meeting. Likewise, if students experiencing homelessness ever participate in activities together, using Rosters may be helpful.

Rosters are simply lists of participants. They can be paper attendance sheets or a list of people on a screen. They are very useful for recording participation in offered services to multiple participants on a specific date.

Rosters can be either Session Rosters or Group Rosters

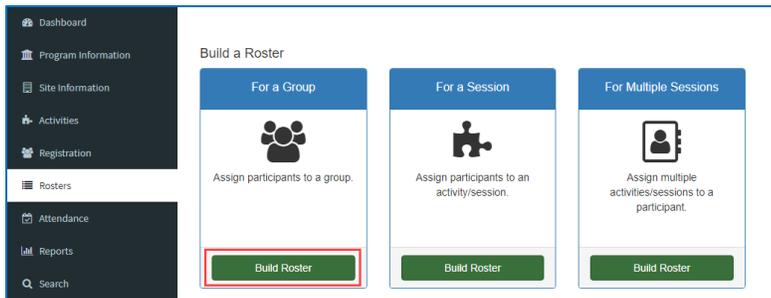
- **Session Rosters** are associated with specific sessions being offered at a school site. They list the names of those people that are expected to attend a particular Session of an Activity. It can eliminate the need for a sign-in sheet as names of those that do attend can simply be checked off on the printed roster or on a tablet screen.
- **Group Rosters** can be used to create a list of participants with common attributes. Examples include groups for grade levels, teachers at a certain school, residents of a certain shelter, etc.

Note participation tracking for an individual person never requires a roster; that attendance can be recorded in the Program Attendance tab of the individual's registration record (see REGISTRATION section above).

This Rosters section will cover:

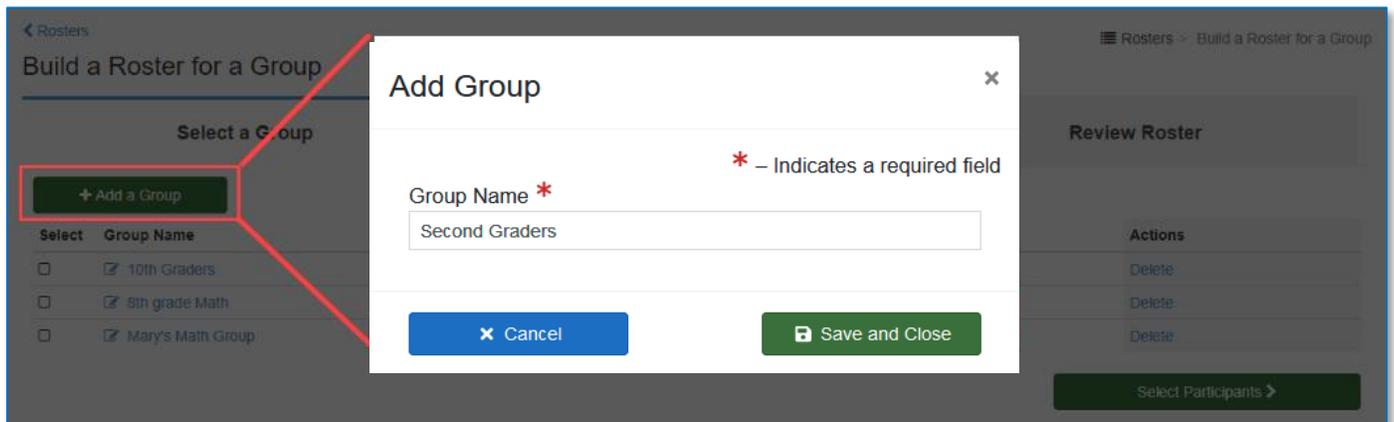
- ✓ Group Rosters
- ✓ Session Rosters
- ✓ Printing Rosters

GROUP ROSTERS



Create a Group

1. In the left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Group' card
3. Click 'Build Roster'



Add a New Group

4. Click the green '+ Add a Group' button,
5. Enter a meaningful Group Name in the window that appears (above)
6. Click 'Save and Close'
7. Your new Group will appear in the Group list. Names can now be added to the Group, creating a Group Roster.



Notes

- Groups are site- and term-specific. New groups will need to be established at the start of each new term.

Build a Roster for a Group

Building a Roster for **Enrichment Group**

Select a Group Select Participants Review Roster

+ Add a Group

Select	Group Name	Staff Member	Actions
<input type="checkbox"/>	10th Graders		Delete
<input type="checkbox"/>	8th grade Math		Delete
<input checked="" type="checkbox"/>	Enrichment Group	KEANE, KELSEY	Delete
<input type="checkbox"/>	Mary's Math Group	NILES, MARIBEL	Delete

Select Participants >

Add Participants to a Group

8. Check the box to select the Group for which you wish to build add names to and build a roster.

9. Click 'Select Participants >'

10. You will be taken to the next screen to select the participants you want to place on this roster.

Select Participants

11. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)

12. Click 'Review Roster >' to advance to the next screen

Building a Roster for **Morning Math**

Select a Group Select Participants Review Roster

By Name or Barcode From Registration List From Session Roster From Group Roster By Search

Scan or type a person's name

Last Name, First Name or Participant ID

Select All Clear All

ID	Name	Grade Level	
125048	Esteves Reyes, Diana A.	8	Selected
126628	Estrada Rodriguez, Aleysha N.	7	

Select a Group Review Roster >

Review Roster

13. Review the list of participants

14. If needed, to remove a name, click on a participant name to make it turn red

15. Click 'Save Roster' – this will save the green names and delete any red names.

Ensure that all names are gray prior to leaving the roster screen. Any names highlighted in green will not be saved and names in red will not be deleted until Save Roster is clicked.

Select a Group Select Participants Review Roster

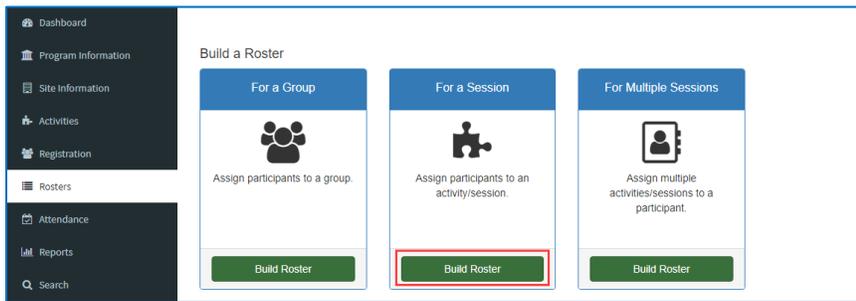
Saved: Gray Pending: Green Pending Delete: Red

0 participant(s) displayed

ID	Name	Grade Level	
AWMS065700	VALADEZ, ELENA		Pending
127410	SOTO, NATHAN		Pending
127385	SMITH, PARKER L.		Pending
AWMS062672	ROMERO, LILLYANNA		Pending
125387	RODRIGUEZ, CAMRON		Pending
125013	PEREZ, LAMONT		Pending
AWMS001088	MARTINEZ, ANDRES		Pending

Select Participants Save Roster

SESSION ROSTERS

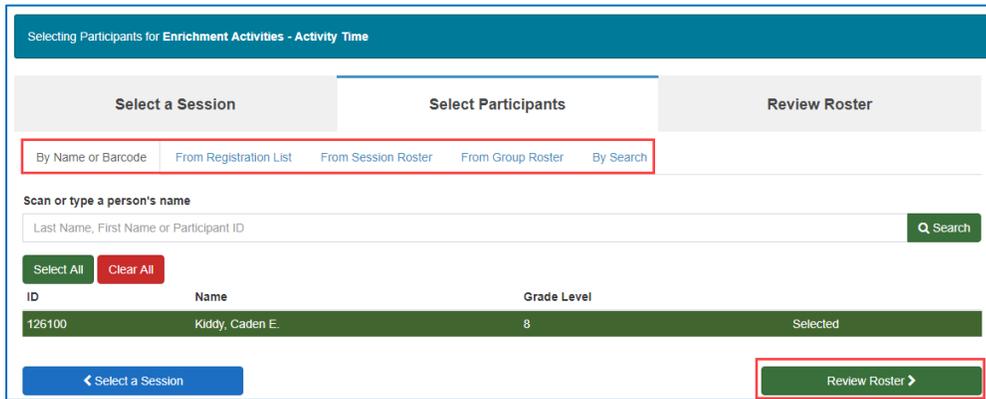
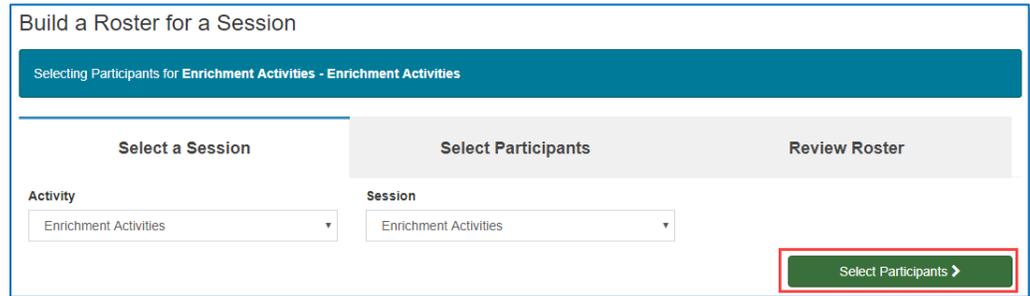


Build a Roster for a Session

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Session' card
3. Click 'Build Roster'

Select Activity and Session

4. Use the drop-down menus to select the Activity and Session for which you are building a roster
5. Click 'Select Participants>' to advance to the next screen



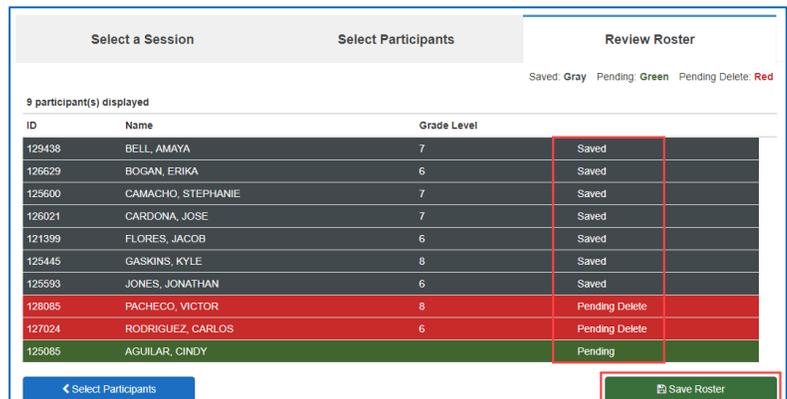
Select Participants

6. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)
7. Click 'Review Roster>' to advance to the next screen

Review Roster

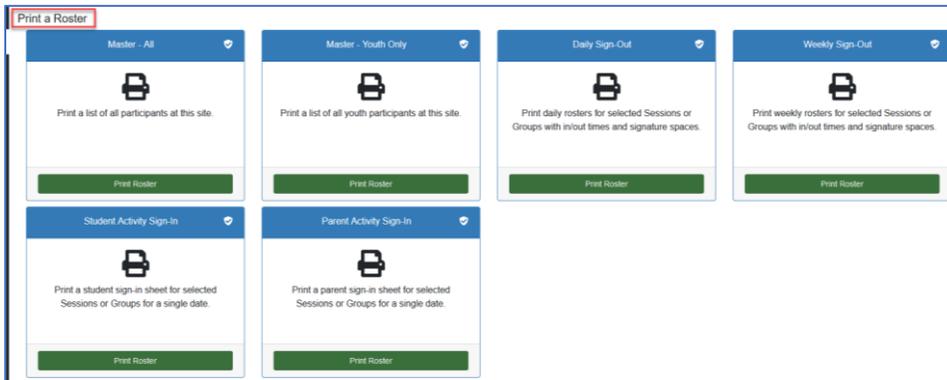
8. Review the list of participants.
9. Click on a participant name to remove it from the list (it will turn red)
10. Click 'Save Roster'

Ensure that all names are gray prior to leaving the roster screen. Any names highlighted in green will not be saved and names in red will not be deleted until 'Save Roster' is clicked.



PRINT A ROSTER

Group or Session Rosters can be used to record participation in Sessions or as sign-in/out sheets.+



Print a Roster

1. In your left-hand navigation menu, click 'Rosters.'
2. Scroll to the Print a Roster section.
3. Locate the card for the roster you wish to print. There are six options.
4. Click 'Print Roster' and a preview screen with options will appear.

4. Select a date to have the date printed on the roster (if required)
5. Select one or more Activities/Sessions or Groups
6. Click 'Preview Roster' to see how the roster will print.
7. Click the green 'Print Roster' button to send to the printer.

Student Activity Sign-In Roster

Select a date: 03/15/2023

From Activity/Session
 From Group

Select 1 or more sessions or groups:

- Instructional Support Services/General Counseling
- Instructional Support Services/Violence Prevention
- Monthly Family Picnic/April Family Picnic
- Monthly Family Picnic/March Family Picnic

Hold down CTRL (or Command) Key to select more than one

Click here to print a blank roster with your request. Use it to record additional names.

Printed: 3/15/2023

Student Activity Sign-In Sheet

District/School: Demo District / Bale Elementary School

Activity/Session: Monthly Family Picnic / March Family Picnic

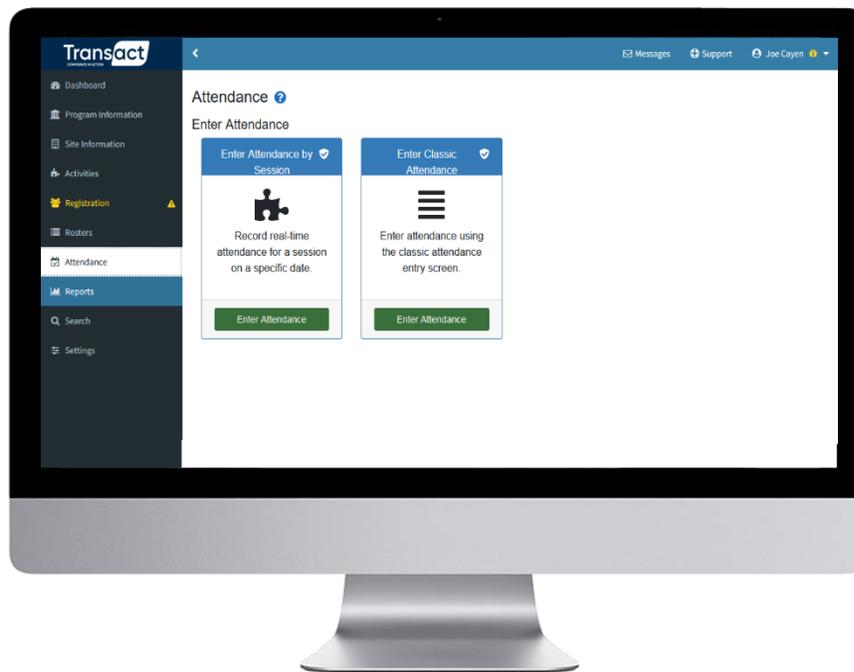
Room/Location: _____
 Date of Activity: 3/15/2023
 Facilitated By: _____

#	Student's Name	Student's Grade	Student's Signature
1	Chavez Argueta, Jameyah	03	
2	Fox, Allison	KG	
3	Ishodes, Geoffrey	01	
4	Robertson, Genesis	03	
5	Rogers, Christian	02	
6	Spinks, Christopher	01	
7	Toney, Helena	04	
8	Walker, Eyerika	03	
9	Wallace, Ashton	05	
10	Wilkins, Audronia	04	
11	Williams, D'Antonio	02	
12	Wright, Tallyah	05	
13	Yasa, Anissa	03	



Tips

- Be sure to click the green 'Print' button when printing. Do not use File > Print or Ctrl+P or Apple+P to print
- Some rosters have a 'Roster Setup' button below the Preview Roster button. Use this to change the fields/columns that appear on the roster. Note that Changes made in Roster Setup will affect all users at the school site.



ATTENDANCE

Recording who received what services is important data to collect. Several methods of attendance collection are available in HIMSS.

1. To track each date an individual participant receives a service, use this Program Attendance tab (details in the Registration section above)
2. To track each date more than one participant receives a service, use the Main Menu Attendance section (details in this section below)
3. To track that a participant received a service when the service date or time or how many times they received the service is not important, use the 'Services Provided' checkboxes in the Homeless Student Data tab (details in the REGISTRATION section above)

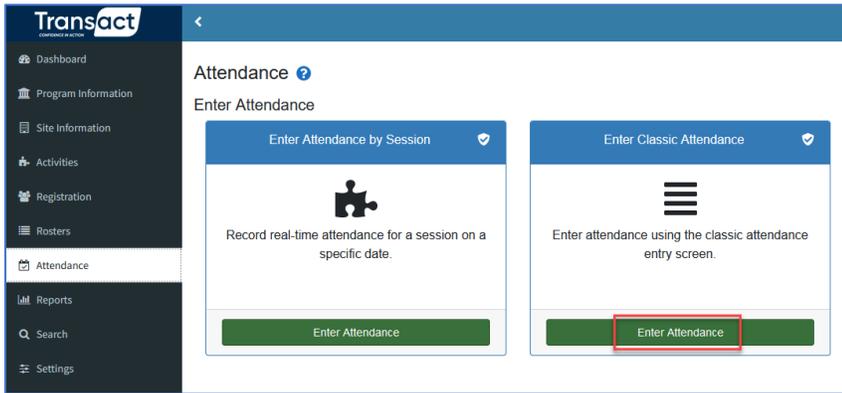
This guide section of will cover taking attendance (recording participation) for more than one person with these two methods:

- ✓ Enter classic (basic) attendance
- ✓ Record real-time attendance

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Attendance can only be recorded while logged in to one Site, not All Sites.
- Notes can be recorded for each attendance if desired with the notepad icon to the right of each attending person's name.

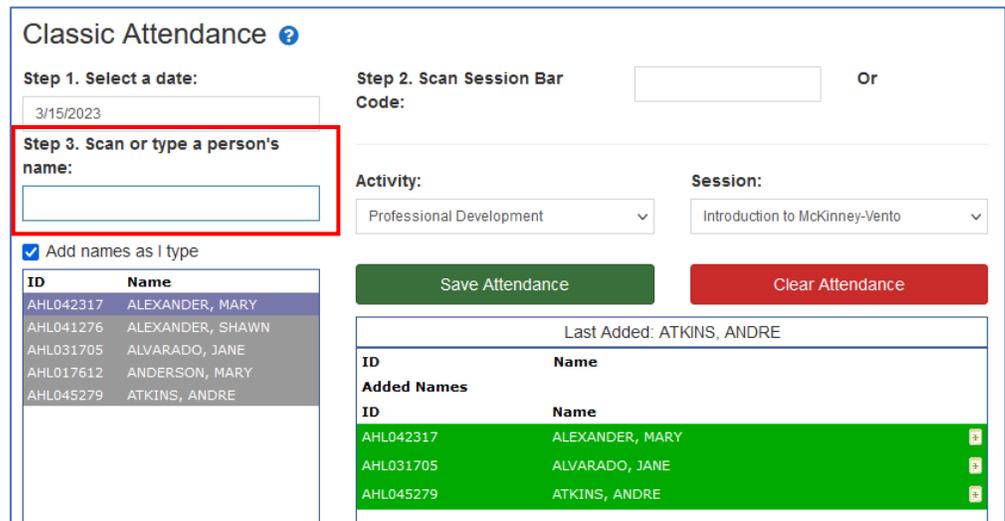
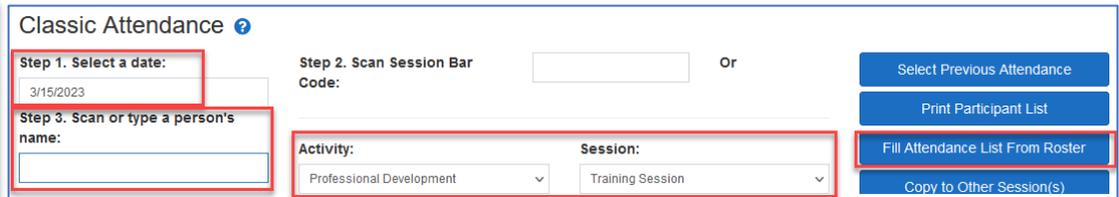
ENTER CLASSIC ATTENDANCE



Enter Attendance

1. In the left-hand navigation menu, click 'Attendance'
2. Locate the 'Enter Classic Attendance' Card
3. Click 'Enter Attendance' and the screen below will appear.

4. Select the date the group participation took place
5. Select the Activity and Session you are recording participation for
6. If a roster was previously created for this session, click the blue 'Fill Attendance List from Roster' button for faster attendance taking. If not, names will be typed into the Step 3: box.



- If you type in the person's name:**
7. Type in part of the participant's last name and hit Enter or Tab on the keyboard. All matching records will show below in gray. If there is only one match, the name will move into the attendance list at right in bright green.
 8. If there are multiple matches, click the correct participant's gray name (example in the image above) to add to the green attendance list at the right.
 9. When the names of all participants are in the attendance list, click the green 'Save Attendance' button. The names will turn gray. To correct mistake, click the saved gray name and it will turn red. Click the green 'Save Attendance' button again to delete any names in red.

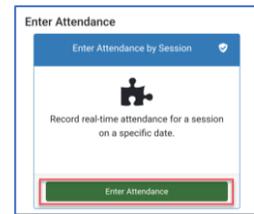


Tips

- Use the blue 'Select Previous Attendance button' to find and review/edit previously recorded attendance.
- If participants received more than one service, attendance can easily be copied from one session/date to another using the blue 'Copy to Other Sessions' button.

RECORD REAL-TIME ATTENDANCE

Real-time attendance can be recorded by staff using a mobile device such as a tablet or smart phone. This can reduce the need for paper attendance sheets and increase the speed of recording participation.



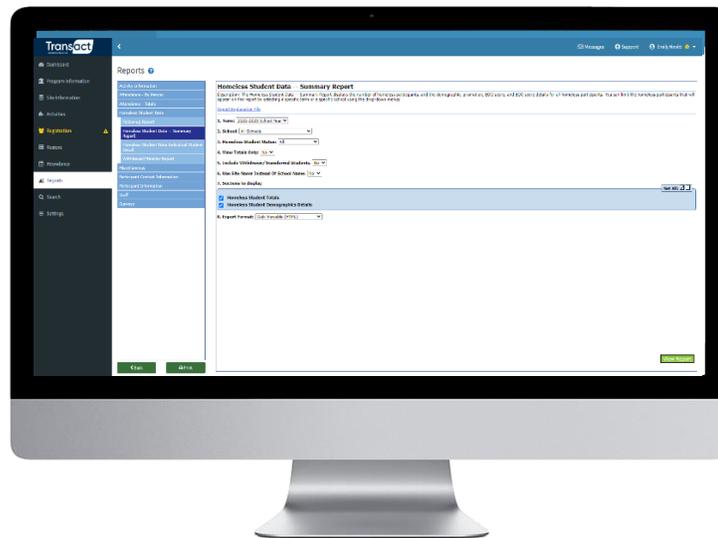
1. Use your smart device to access and login to your HIMSS website
2. In the left navigation menu, tap 'Attendance'
3. Locate the 'Enter Attendance by Session' card
4. Tap 'Enter Attendance' and the screen below will appear where you will pick the Activity, Session, and Date you wish to take attendance for from the provided drop-down fields
5. Tap 'Select Participants>'

6. Choose one or more options to select which people to record attendance for
 - o 'Roster' (if a roster was created previously for this session),
 - o 'Search' (uses the Search feature) or
 - o By participants names grouped together by last name A-H, I-R, and S-Z.
7. Tap the participant names of those present at the event
8. Tap 'Review Attendance>' when done

ID	Name	Status
AHL042317	ALEXANDER, MARY	Selected
AHL041276	ALEXANDER, SHAWN	
AHL031705	ALVARADO, JANE	
AHL017612	ANDERSON, MARY	Selected
AHL045279	ATKINS, ANDRE	Selected
AHL066684	BARTLETT, MARY	Selected
AEL079972	CARRILLO, GRACE	
AHL019398	DARROW, DARLENE B.	
ABES034804	Franz, Jose	

9. All selected names will appear together in green marked Pending. To remove a name, tap to mark it for deletion from this list (the name will turn red)
10. Tap the blue '<Select Participants' button to go back and add name(s) if missed.
11. Tap 'Save Attendance' upon completing review; the names will turn gray.
12. Tap 'Finish>' to complete the process; a confirmation screen will appear.

Student ID	Full Name	Status
AHL042317	ALEXANDER, MARY	Pending
AHL017612	ANDERSON, MARY	Pending
AHL045279	ATKINS, ANDRE	Pending
AHL066684	BARTLETT, MARY	Pending



REPORTS

To get data out of HIMSS, numerous pre-built reports are available to provide program-specific information to funders, administrators, and evaluators.

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- On the main reports screen, a list of report categories will appear. Click a category to view the corresponding selection of reports.
- Refer to the description documentation for details on the report you want to generate. For details on how a report's data is generated, click the blue [Report Explanation File](#) link located below most report descriptions.
- Most reports are generated when logged in to one site. Some reports that are useful for District-Level staff are available when Change Credentials is set to All Sites.
- Many reports can be exported to a “.csv” format. These can be opened in Excel.
- To save a report as a PDF, we recommend installing a free PDF printer if not already installed by default on your computer. “Print” the report to that PDF printer and save the file on your computer.
- Be sure to click the green ‘Print’ button when printing. Do not use File > Print or Ctrl +P or Apple +P to print.

GENERATE REPORTS

Generate a Report

1. In the left-hand navigation menu, click 'Reports.'
2. Click a report category to view the corresponding selection of reports.
3. Click on the report you wish to generate
4. Select any criteria to include/exclude on the report as well as the format for printing / exporting.
5. Click 'View Report' in the lower right corner.
6. Click the green 'Print' button in the lower-left corner to send the report to your selected printer.

Transact | Messages | Support | Emily Nevitt

Reports

- Activity Information
- Attendance - By Person
- Attendance - Totals
- Homeless Student Data
 - Homeless Student Data -- Summary Report**
 - Homeless Student Data Individual Student Detail
 - Withdrawal/Transfer Report
- Miscellaneous
- Participant Information
- Staff
- Surveys

Homeless Student Data -- Summary Report
 District: Demo District
 Site: All Sites
 Term: 2022-2023 School Year
 School: All Schools
 Homeless Student Status: All
 Date Run: Wednesday, February 22, 2023 at 2:49:27 PM (CT)

Homeless Student Totals

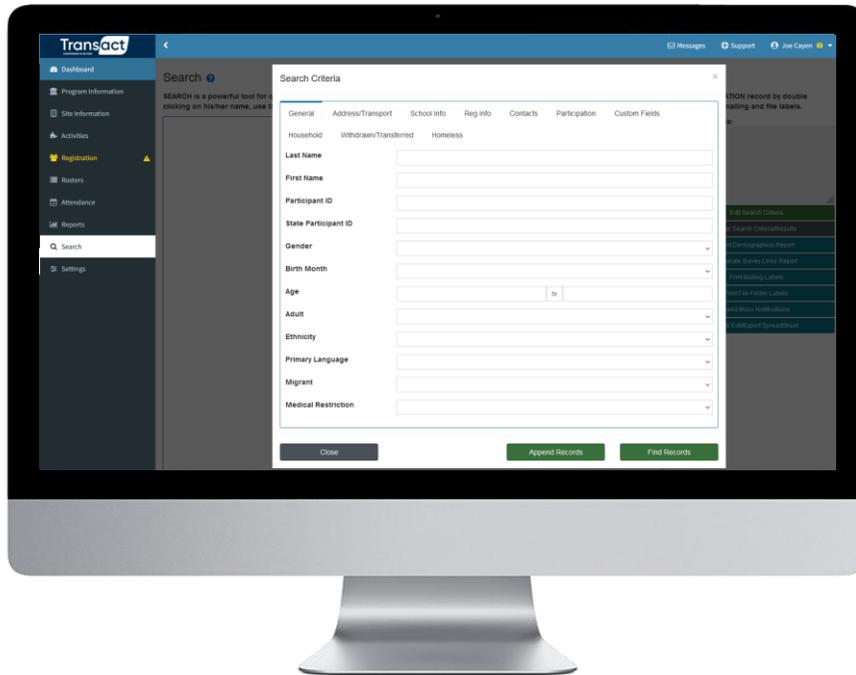
District	School/Site	Term	# Homeless Students
Demo District	BALE ELEMENTARY SCHOOL	2022-2023 School Year	15
Demo District	HENDERSON MIDDLE SCHOOL	2022-2023 School Year	7
Demo District	JEFFERSON ELEMENTARY SCHOOL	2022-2023 School Year	13
Total # of Homeless Students:			35

--- Page Break ---

Homeless Student Demographic Details

District	School/Site	Term	Demographic Detail	Total
Demo District	BALE ELEMENTARY SCHOOL	2022-2023 School Year	Nighttime Primary Residence: Shelters and transitional housing	3
			Nighttime Primary Residence: Doubled-up	3
			Nighttime Primary Residence: Unsheltered	3
			Nighttime Primary Residence: Hotels/motels	5
			Nighttime Primary Residence: Missing	1
			Reason: Abandoned	2
			Reason: COVID 19	1
			Reason: Data Missing	2
			Reason: Financial hardship	1
			Reason: Loss of Housing	1
			Reason: Migratory lifestyle	1
			Reason: Moving from place to place / "couch surfing"	1
			Reason: Natural Disaster (ex: fire, hurricane, tornado, etc.)	1
			Reason: Previous housing was substandard / inadequate	1
			Reason: Runaway/Homeless Youth Shelter (even if parent invites youth home)	1
			Migrant	2
			Unaccompanied Youth	1
			Has Disability (IDEA)	1
			Transportation Requested	1
			Clothing Voucher	

← Back | Print



SEARCH

Search is a powerful tool for quickly generating a list of participants meeting user-selected criteria. Use the Quick Edit/Export Spreadsheet feature to edit information for a group of participants or to generate ad hoc reports. This section of the guide will cover these sections of Search.

- ✓ Find records that match certain criteria
- ✓ Generate custom reports / exports
- ✓ Quick edit registration records
- ✓ Print mailing / file folder labels

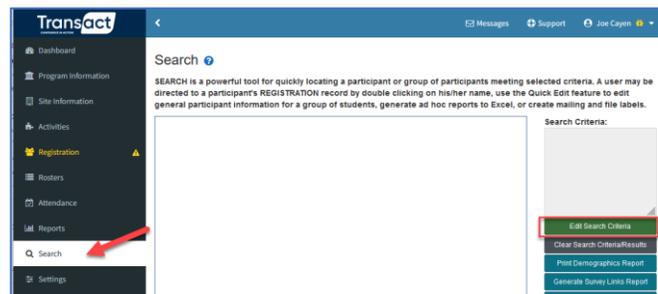
IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Fields from multiple tabs in the Edit Search Criteria screen can be combined to find the information you need.
- Only participants that match ALL search criteria entered will be found in the results list.
- If a search finds more than 1,000 matching records, the print mailing labels and print file folder labels buttons will be disabled. Additionally, the performance of other features may be affected.

FIND RECORDS THAT MATCH CERTAIN CRITERIA

Find Records

1. In the left-hand navigation menu, click 'Search'
2. Click 'Edit Search Criteria' and the window below will appear



3. Use the criteria tabs to locate specific fields and enter values for the participants you want to find
4. Click 'Find Records.' The search results will be displayed in gray as shown below

Search Criteria

General | Address/Transport | School Info | Reg Info | Contacts | Participation | Custom Fields

Household | Withdrawn/Transferred | Homeless

Last Name

First Name

Participant ID

State Participant ID

Gender

Birth Month

Age to

Adult

Ethnicity

Primary Language

Append Records

Search Results: 3 Found

Participant ID	Name	Site
Edit 401015	Rhodes, Geoffrey	Bale Elementary School
Edit 405481	Spinks, Christopher	Bale Elementary School
Edit 400434	Stewart, Bryan	Bale Elementary School

Search Criteria:

Grade: 01

Append Records

Append Records

If desired, to add names to the current search results with a different search, first click 'Edit Search Criteria' again. Clear the previously entered search criteria in each various tab and enter new criteria. Then click the green 'Append Records' button and the new search results will be added to the previous results as show to the right with an "OR" function.

Search Results: 12 Found

Participant ID	Name	Site
Edit 400074	Chavez Argueta, Jamayah	Bale Elementary School
Edit 388663	Fox, Allison	Bale Elementary School
Edit 401015	Rhodes, Geoffrey	Bale Elementary School
Edit 405481	Spinks, Christopher	Bale Elementary School
Edit 400434	Stewart, Bryan	Bale Elementary School
Edit 407947	Toney, Helana	Bale Elementary School
Edit 380374	Walker, Byenka	Bale Elementary School
Edit 407228	Wiggins, Ayanna	Bale Elementary School
Edit 407227	Wilkins, Audrionia	Bale Elementary School
Edit 383364	Williams, D'Antonio	Bale Elementary School
Edit 364605	Wright, Taliyah	Bale Elementary School
Edit 403382	Yoss, Arissa	Bale Elementary School

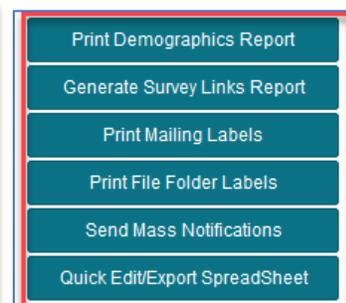
Search Criteria:

Grade: 01
----- OR -----
Gender: Female

Edit Search Criteria
Clear Search Criteria/Results
Print Demographics Report
Generate Survey Links Report

Once search results have been returned, there are numerous options of what to do with the results.

- Print a demographics report
- Generate links for taking surveys via the survey portal
- Create mailing / file folder labels
- Generate a custom report / export
- Send mass notifications
- Use Quick Edit to update registration information



GENERATE CUSTOM REPORTS / EXPORTS

1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to include in the report
3. Click 'Print/Export to Excel.' A preview of the report will appear
4. Click 'Print' to print the report or click 'Click Here to Download' to export the information in Excel format to your computer.

Select Registration information to include on an editing form, report or spreadsheet

To add and edit specific information on the Quick Edit form, place a check mark beside each field you would like to update. Always include Name but also include other fields that will help you identify a participant such as Age, Grade Level or Day School. But remember that page width is limited on your computer screen. If you intend to export the information, you may include fields without regard for page width. To include all fields in a category, select the category header (such as Medical Information).

Search Criteria [ALL]

General Information: Last Name, First Name, Middle Name, E-Mail, Date of Birth, Age, Gender, NCES Ethnicity, NCES Race, Participant ID, State Participant ID, Barcoded Participant ID, Primary Language, Parent Primary Language, Home Address, Home Address City.

School Information: Homeroom, Grade Level, Day School Attending, Lunch Status, Elem. Homeroom Teacher, HS/HS Math Teacher, Special Ed. Status, LEP Status, Registration Information, Select Participant Y/N, Registered, Form Signed, Date Form Signed, Signed By, Active.

Quick Edit Report

Last Name	First Name	Phone	Grade
ABARCA	ALLISON		
Acevedo	Abel	555440232	10
Acevedo	Stephanie	5559733063	10
Acevedo	Yecenia	5552444162	10
Acosta	Angelique	555483545	10
ACOSTA	MICHELLE	555718438	10
Akins	Henry		

Buttons: Cancel, Clear Criteria, Print/Export to Excel, View Quick Edit Form, Click Here to Download, Save and Refresh.

QUICK EDIT REGISTRATION RECORDS

1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to edit, being sure to choose people's first and last name
3. Click 'View Quick Edit Form'
4. Edit data in your selected fields as needed and click 'Save and Refresh'

Select Registration information to include on an editing form, report or spreadsheet

To add and edit specific information on the Quick Edit form, place a check mark beside each field you would like to update. Always include Name but also include other fields that will help you identify a participant such as Age, Grade Level or Day School. But remember that page width is limited on your computer screen. If you intend to export the information, you may include fields without regard for page width. To include all fields in a category, select the category header (such as Medical Information).

Search Criteria [ALL]

General Information: Last Name, First Name, Middle Name, E-Mail, Date of Birth, Age, Gender, NCES Ethnicity, NCES Race, Participant ID, State Participant ID, Barcoded Participant ID, Primary Language, Parent Primary Language, Home Address, Home Address City.

School Information: Homeroom, Grade Level, Day School Attending, Lunch Status, Elem. Homeroom Teacher, HS/HS Math Teacher, Special Ed. Status, LEP Status, Registration Information, Select Participant Y/N, Registered, Form Signed, Date Form Signed, Signed By, Active.

Quick Edit Form

Last Name	First Name	Phone	Grade
ABARCA	ALLISON		
Acevedo	Abel	555440232	10
Acevedo	Stephanie	5559733063	10
Acevedo	Yecenia	5552444162	10
Acosta	Angelique	555483545	10
ACOSTA	MICHELLE	555718438	10
Akins	Henry		

Buttons: Cancel, Clear Criteria, Print/Export to Excel, View Quick Edit Form, Save and Refresh.



Tips

- Save frequently when using Quick Edit in Search. Often several hundred records are being saved at once. Problems with your internet connection at the wrong time could result in data not saving properly.

PRINT MAILING / FILE FOLDER LABELS

Print Mailing Labels

1. Once search results have been returned, click 'Print Mailing Labels'
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click 'View/Print Labels'
4. Click 'Print' to send the labels to the printer

Position Labels on the Page and View/Print

Purpose: Print labels for the selected records.

Instructions: To position the first (or only) label, count across and down the page of blank labels. Enter the position number in the space provided. Then click on 'Create Labels' to review and print your labels. Please use Avery 5160 or compatible for printing mailing labels, and Avery 8366 or compatible for printing file folder labels. If you accidentally close the preview window, or if you want to print another set of the same labels, you can click on 'View/Print Labels' to view and print the labels again.

Start Printing Labels in Position Number:

To Parent/ Guardian of:

Use Mailing Address:

Print:

Close

View/Print Labels

Print File Folder Labels

1. Once search results have been returned, click 'Print File Folder Labels'
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click 'View/Print Labels'
4. Click 'Print' to print your labels

Position Labels on the Page and View/Print

Purpose: Print labels for the selected records.

Instructions: To position the first (or only) label, count across and down the page of blank labels. Enter the position number in the space provided. Then click on 'Create Labels' to review and print your labels. Please use Avery 5160 or compatible for printing mailing labels, and Avery 8366 or compatible for printing file folder labels. If you accidentally close the preview window, or if you want to print another set of the same labels, you can click on 'View/Print Labels' to view and print the labels again.

Start Printing Labels in Position Number:

Print:

Close

View/Print Labels



Tips

- When printing mailing and file folder labels, be sure review the instructions noted on the Position Labels on the Page and View/Print window.
- Use Avery 5160 (or compatible) labels when printing mailing labels.
- Use Avery 8366 (or compatible) labels when printing file folder labels.

SEND MASS NOTIFICATIONS

1. Once search results have been returned, click 'Send Mass Notifications.' A screen like the one to the right will appear opening a step-by-step process to generate communications with those persons found in the search.

The screenshot shows the 'Send Mass Notifications' interface. At the top, there are navigation links for '< Search' and 'Search > Send Mass Notifications'. Below the title, there are four tabs: 'Select Delivery Method(s)', 'Delivery Method Settings', 'Compose Message', and 'Select Recipients'. Under 'Select Delivery Method(s)', there are two options: 'Email' (with an envelope icon and a blue checkmark) and 'SMS Text' (with an SMS icon and a checkbox). A 'Next >' button is located at the bottom right.

2. Email is the default Delivery Method. SMS text is available for a fee – contact your Account Manager for more details.
3. Click Next> to move to Email Settings (at right)
4. Enter the email address that emails sent from HIMSS will come FROM. Then click the blue 'Verify Email Address' button. A message will appear saying a verification email was sent to that address. You must click the verification link in the email sent to the inputted email address to continue. A green "Verified" will appear when this is complete.
5. Click Next> to move to the Compose Message section

The screenshot shows the 'Email Settings' screen. It has the same four tabs as the previous screen. A red banner at the top says 'You must enter a verified email address as the "From" email address before you can Send a Mass Email Notification.' Below this, there is a text input field with the placeholder 'Send Notifications from Email - Not Verified' and a blue 'Verify Email Address' button. At the bottom, there are '< Back' and 'Next >' buttons.

The screenshot shows a screen titled 'Send Notifications from Email - Pending Verification'. It features a text input field containing the email address 'cayen@aol.com'.

The screenshot shows a screen titled 'Send Notifications from Email - Verified'.

6. Enter a subject for the email and the message. Note the Placeholder drop down will allow you to insert values from the search results. In the example screen to the right, first name was inserted. Each email will then be a bit more personalized for the recipient.
7. Complete the composing of the email and click 'Next >'

The screenshot shows the 'Compose Message' screen. It has the same four tabs. The 'Subject (Email only)*' field contains 'Picnic reminder'. The 'Message Body*' field has a 'Placeholders' dropdown menu with a red arrow pointing to it. Below the dropdown, the text 'Dear [Participant First Name]' is visible. At the bottom, there are '< Back' and 'Next >' buttons. A legend at the top right indicates '* -- Indicates a required field'.

8. The last section is to pick which of the search results people you would like to send the message.
9. There are three options to filter the list with: Participants, Parents/Guardians of Participants and All Contacts. One or more options can be selected. Changing the sections will instantly change the list of people showing in the list.
10. After filtering the Participants, Parents/Guardians of Participants and All Contacts options, you can further select by checking the box in the 'Send To' column. Note in the example below, the student *Rhodes, Geoffrey* doesn't have an email address in HIMSS; thus, it is not possible to select his record to send an email.
11. When your selections are complete, click the green 'Send Notifications' button to send the email.

Select Delivery Method(s)
Delivery Method Settings
Compose Message
Select Recipients

Send to Participant
 Send to Parents/Guardians
 Send to All Contacts

Select All
Clear All

Send To	Recipient Name	Participant Name	Participant ID	Relationship	Email
<input checked="" type="checkbox"/>	Rhodes, Anna	Rhodes, Geoffrey T.	401015	Parent/Guardian	arhodes3333@mail.com
	Rhodes, Geoffrey T.	Rhodes, Geoffrey T.	401015	Self	

< Back
Send Notifications