CONTACT
E: support@cayen.net

HIMSS HANDBOOK

FOR OPERATING THE HOMELESS INFORMATION MANAGEMENT SYSTEM FOR STUDENTS SOFTWARE

UPDATED: 5/1/23

Table of Contents

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.

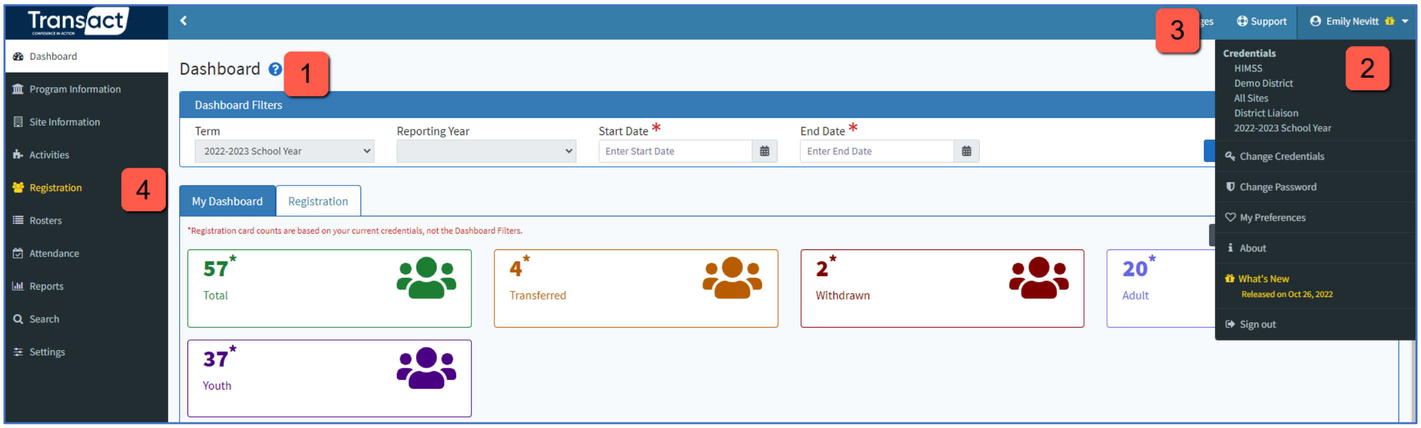
2 ADD YOUR HIMSS SITE AS A FAVORITE

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

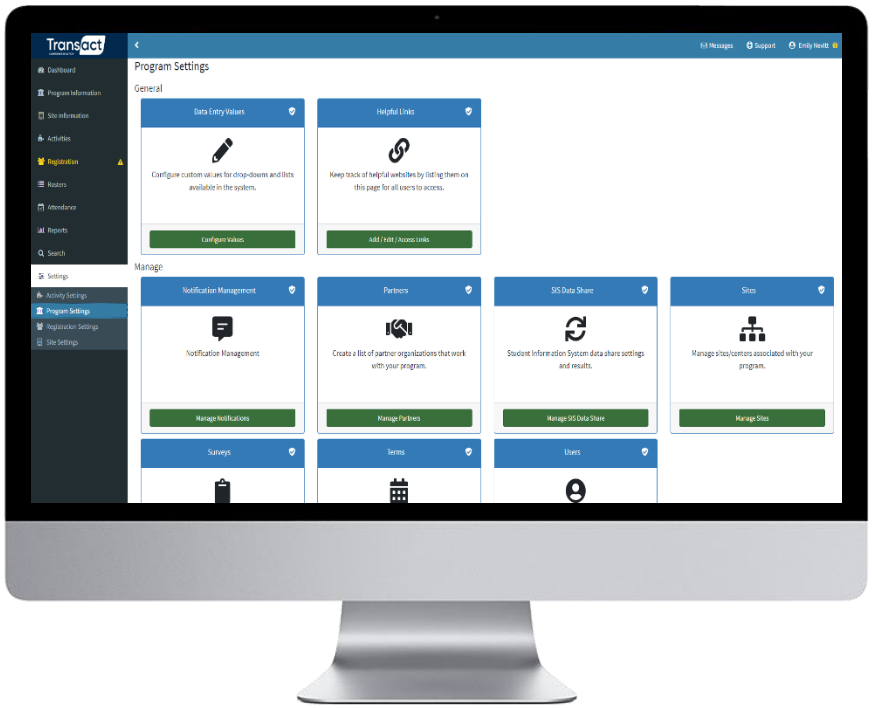
The My Profile area contains information specific to your account, including changing your password. Use Change Credentials to view other School Sites or Terms.

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.

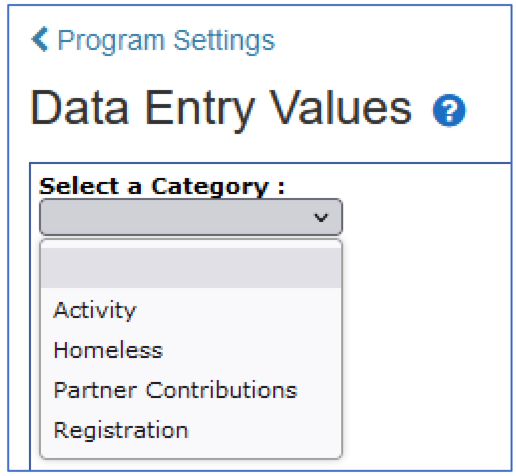
- ✓ Data Entry Values
- ✓ Helpful Links
- ✓ Notification Management
- ✓ Partners
- ✓ SIS Data Share
- ✓ Sites
- ✓ Surveys – see Help document within the HIMSS Survey section or [here]
- ✓ Terms
- ✓ Users
- ✓ Custom Fields
- ✓ Required Fields

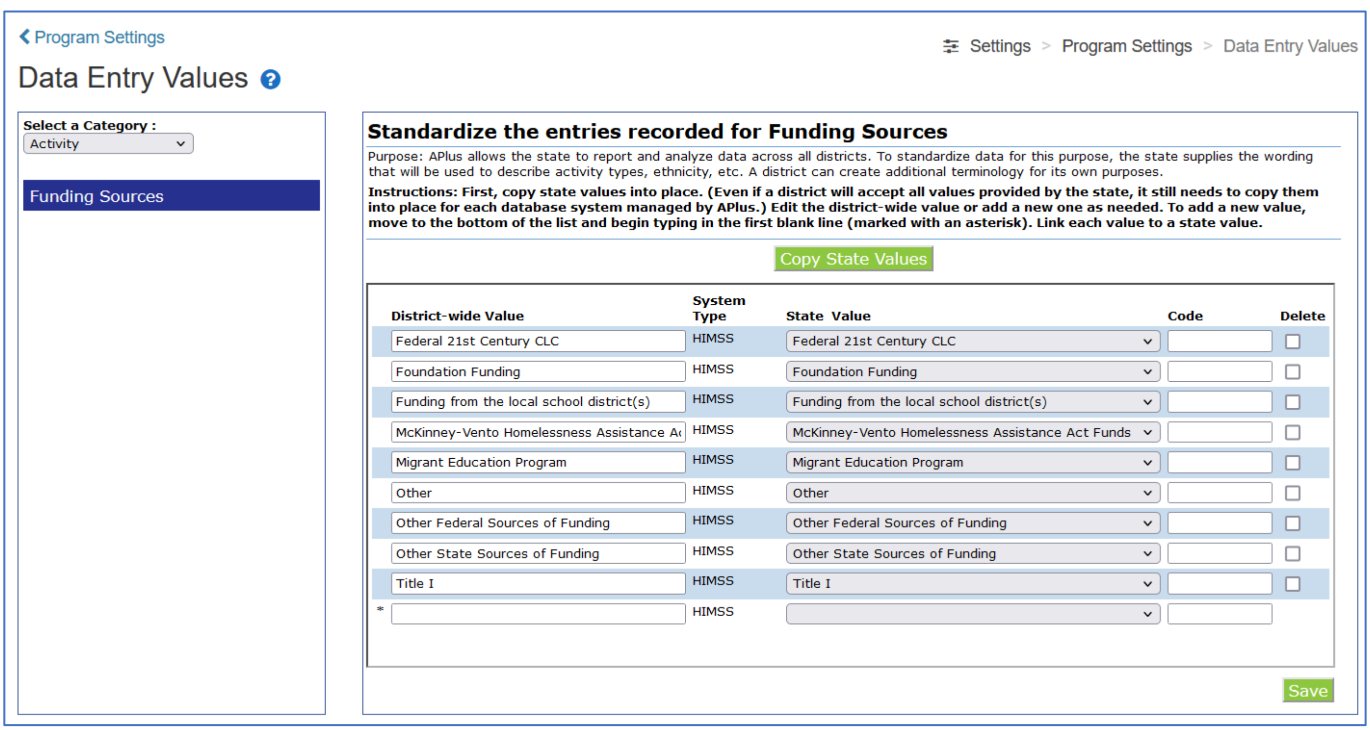
DATA ENTRY VALUES

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.



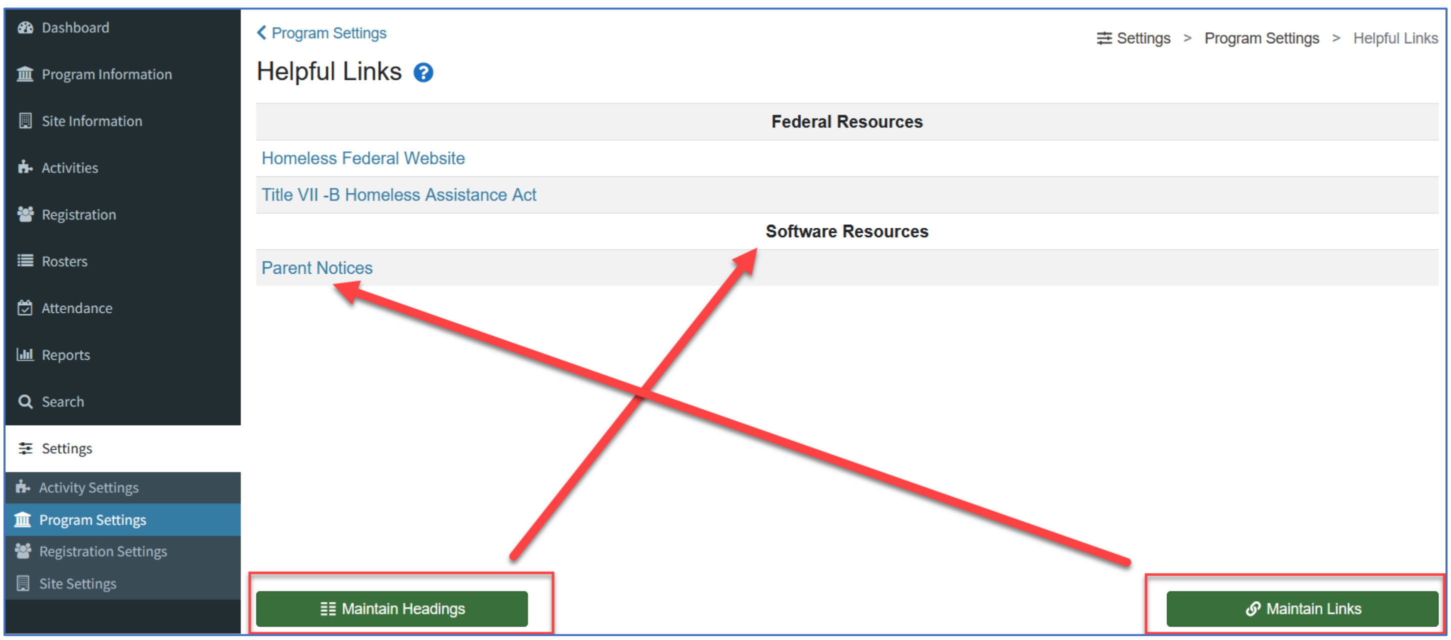


HELPFUL LINKS

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

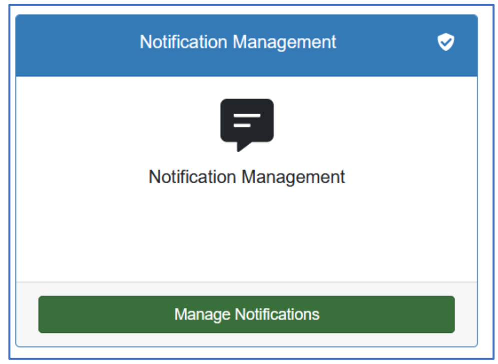


Tips

- 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.



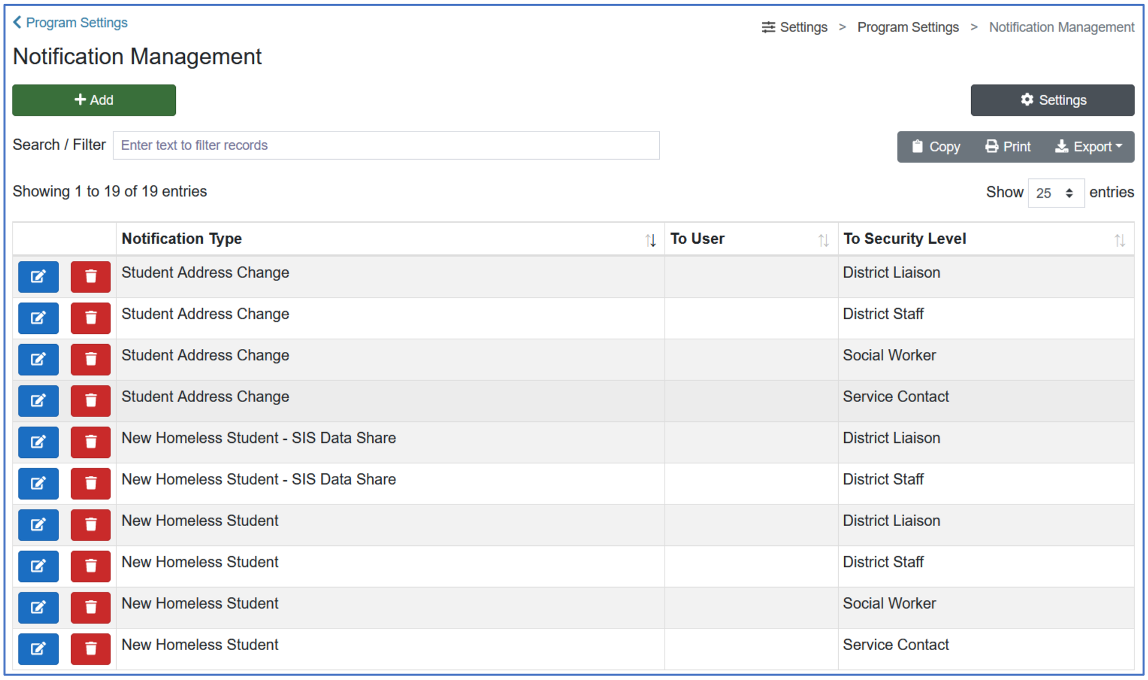
There are six standard notifications in HIMSS. These notifications are triggered by certain actions you take in the system or those that are triggered by changes in data in the file coming from your district's SIS each night.

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	• District Liaison
New Homeless Student	When a student record is first marked as "Approved" in HIMSS on the Homeless Student Data tab, and saved	• 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	• 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	• 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	• 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	• 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.

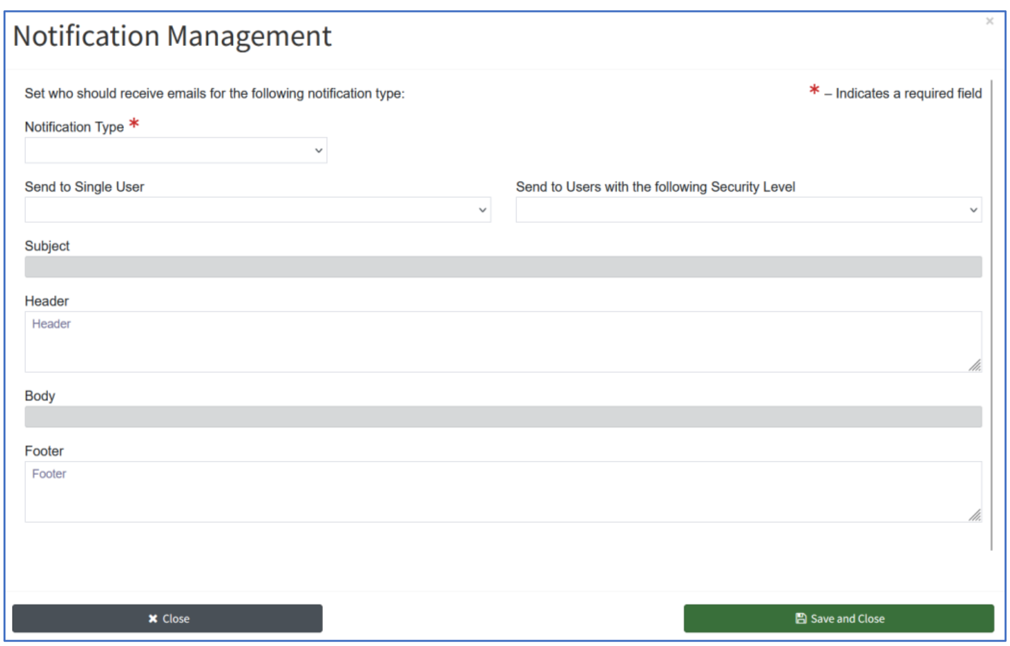
Each row shows which notification type and who it will be sent to.



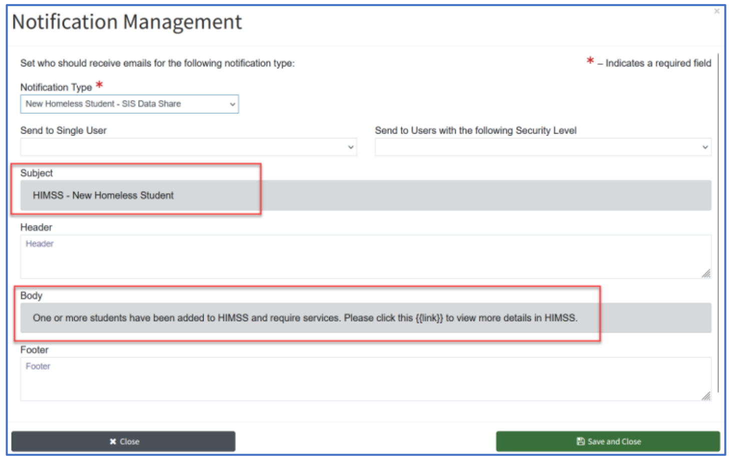
Notification Type	To User	To Security Level
Student Address Change		District Liaison
Student Address Change		District Staff
Student Address Change		Social Worker
Student Address Change		Service Contact
New Homeless Student - SIS Data Share		District Liaison
New Homeless Student - SIS Data Share		District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

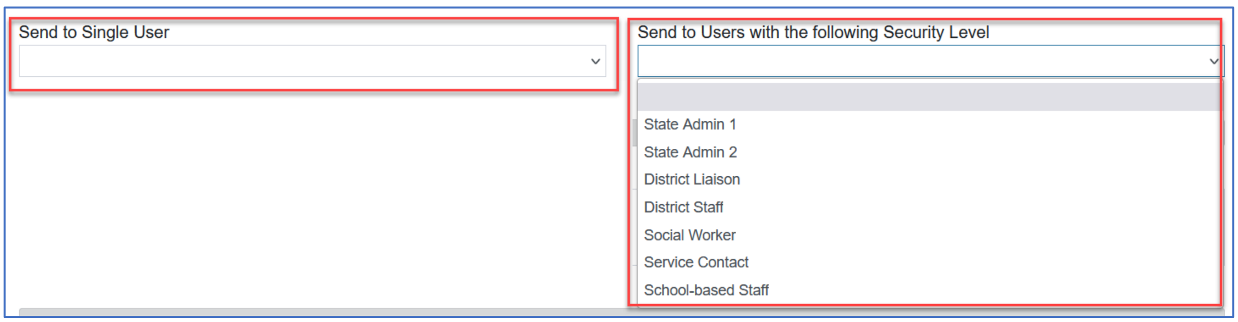
To add a new Notification record, click green +Add button. The following screen will appear.



1. 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.



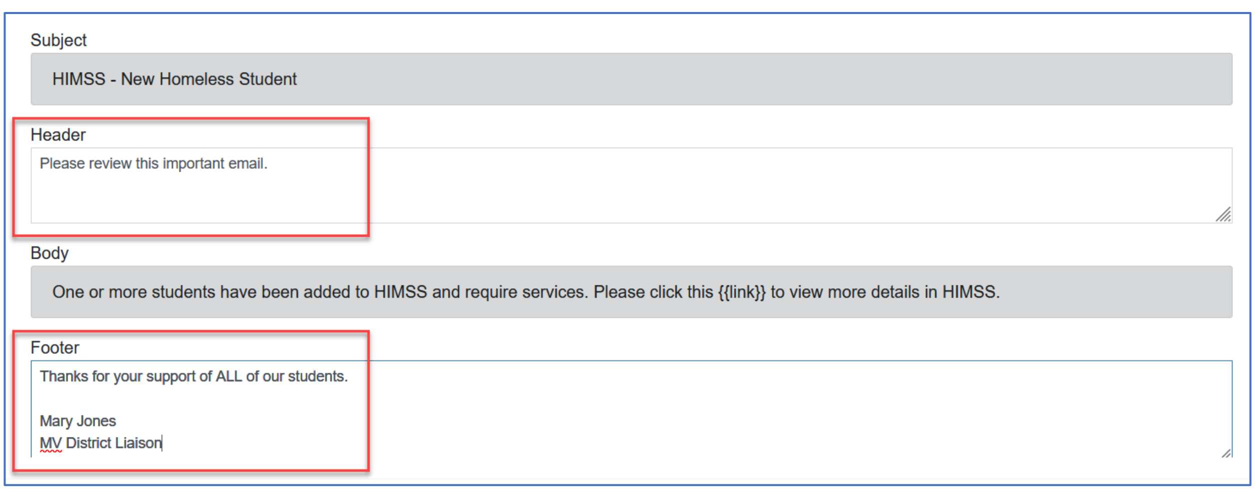
2. Decide who should get this notification – a single user <u>or</u> all users of a certain security level.



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

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



4. 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.

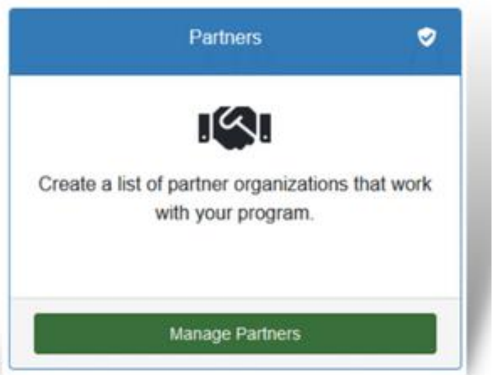
	Notification Type	To User	To Security Level
	New Homeless Student		District Liaison
	New Homeless Student		District Staff
	New Homeless Student		Social Worker
	New Homeless Student		Service Contact

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.

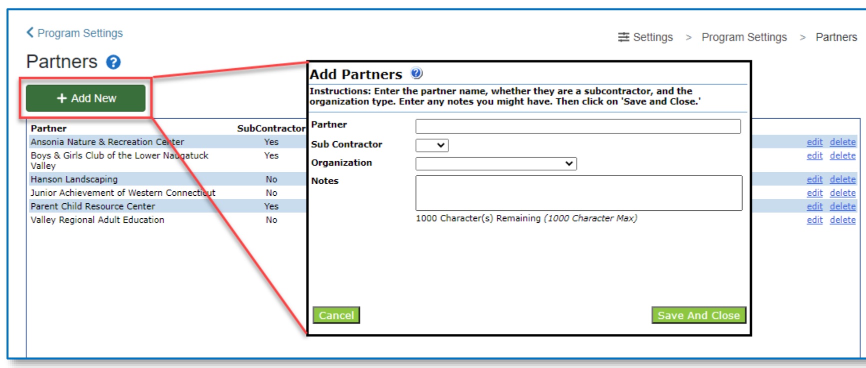


Manage Partners

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

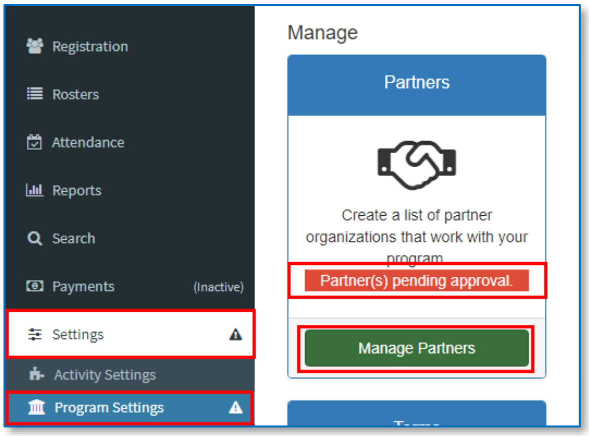


Tips

- 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.

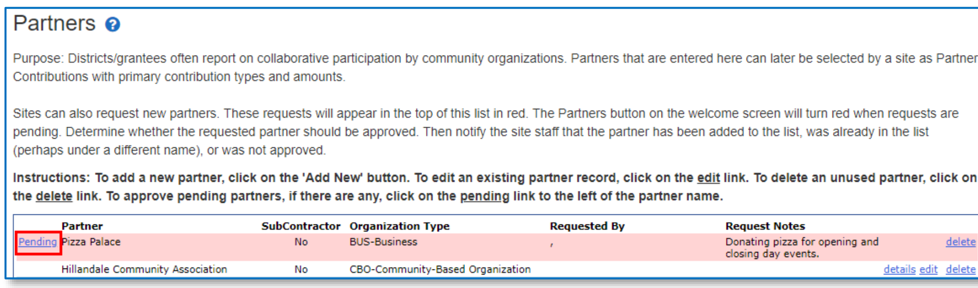


Review Pending Partner Requests

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.



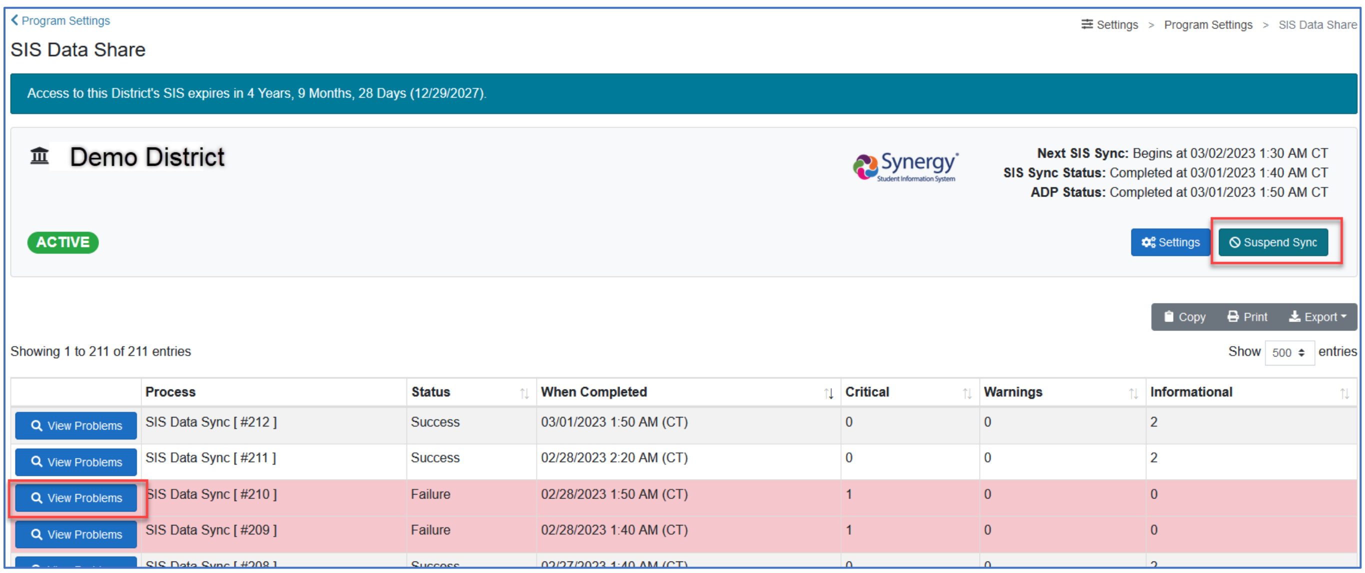
SIS DATA SHARE

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

Only advanced users should modify these settings.

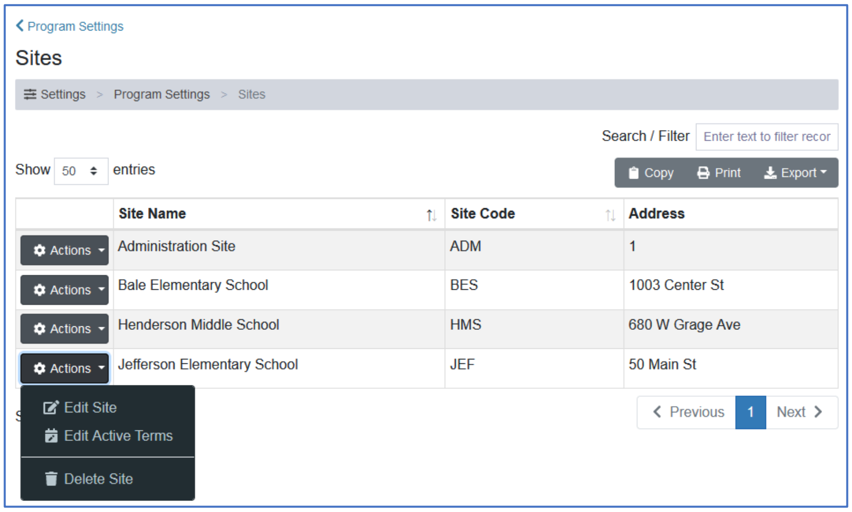
If you run into errors as indicated by a Failure in the Status column and a red highlighted row, you can view the issues by clicking the blue View Problems button. Please contact HIMSS support if you need assistance in addressing the listed problems.

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!



SITES

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



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.

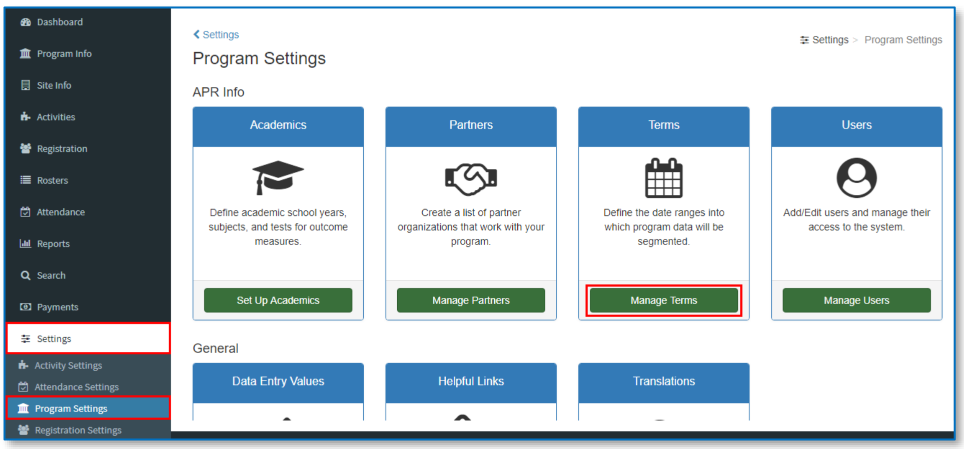
Notes

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

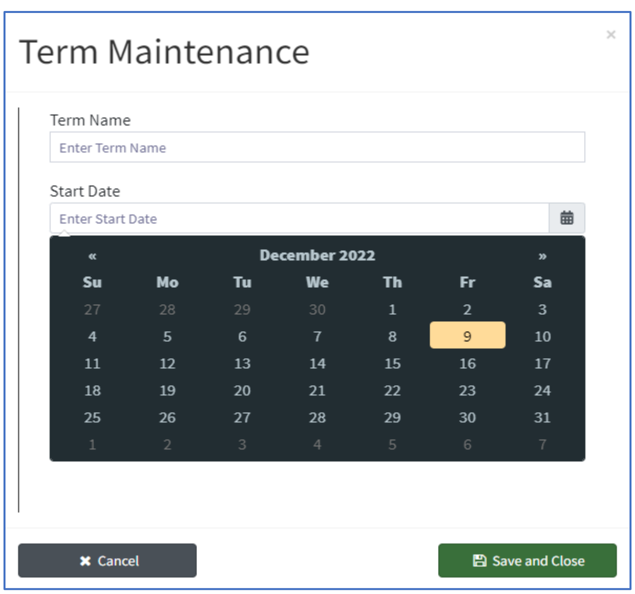
Terms are used to define the date range for a current year's program, typically starting around July 1 when a district's SIS is updated for the new year (students are assigned new grade levels, placed in the current school and homeless indicators are removed from the previous year).

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

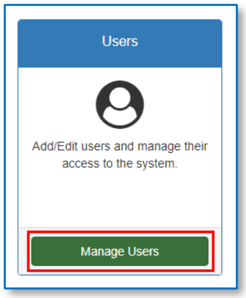
1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Terms' Card
3. Click 'Manage Terms'



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.

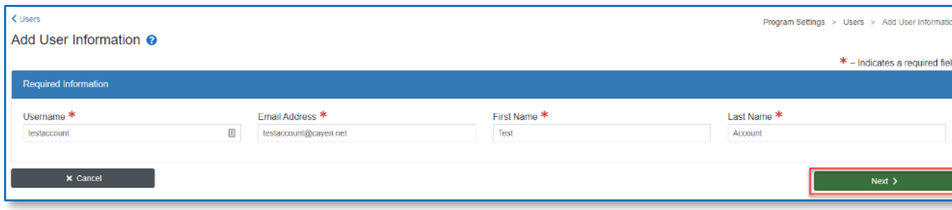


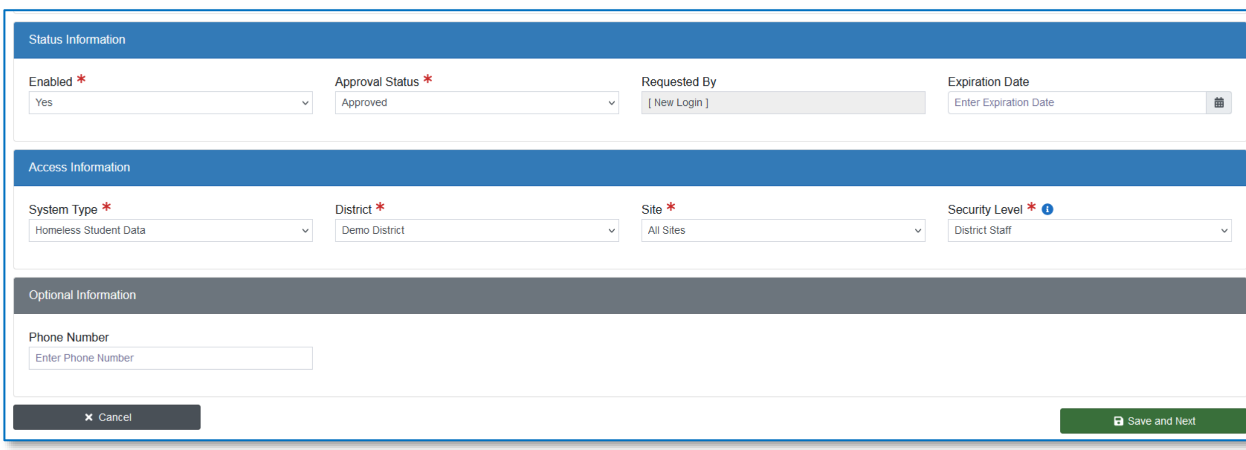
Manage Users

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.

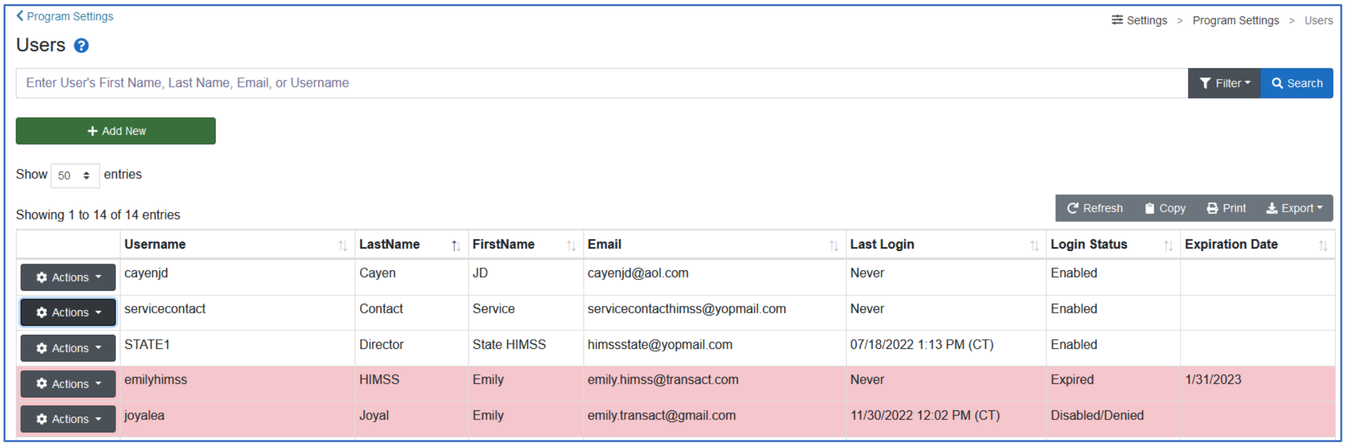




4. Set the Status Information and Access information including appropriate system type, district (if applicable), site (if applicable), and security level for the user, based on their job function/ responsibility. NOTE - if the **Service Contact** security level is selected, an additional field requiring 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.

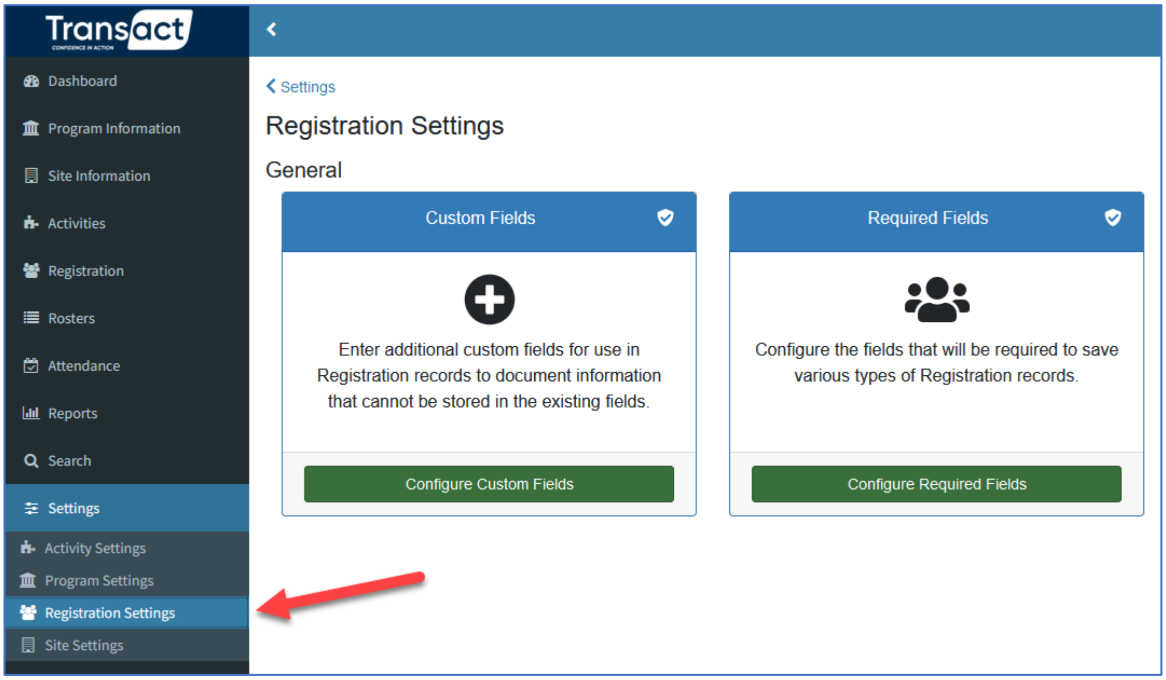
1. Click the ‘Actions’ button and select ‘Edit.’
2. Edit the user record as needed.
3. Click ‘Save and Close’ when finished.



	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.

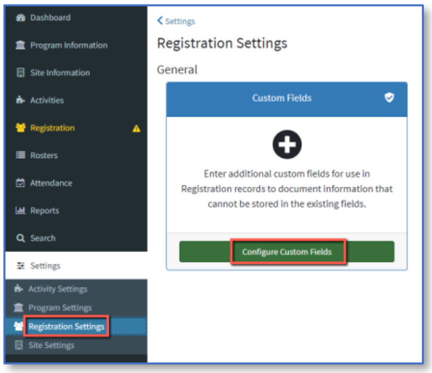


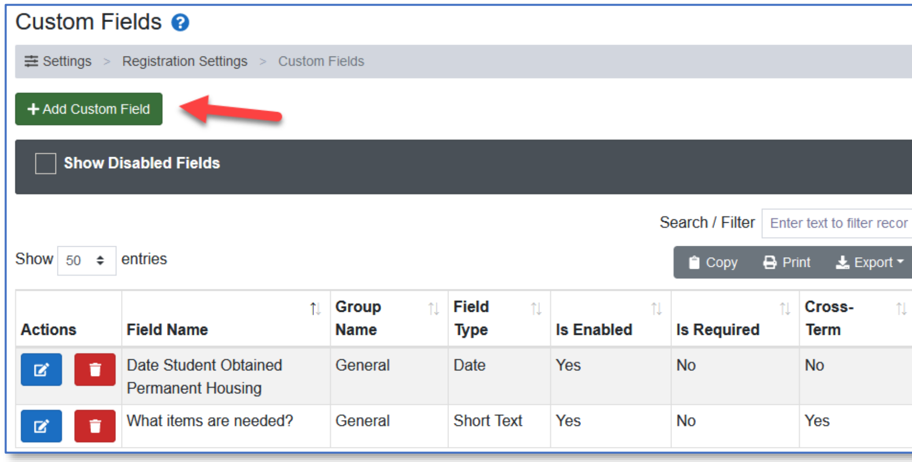
The next two areas of HIMSS setup can be found in Settings > Registration Settings.

- ✓ Custom Fields
- ✓ Required Fields

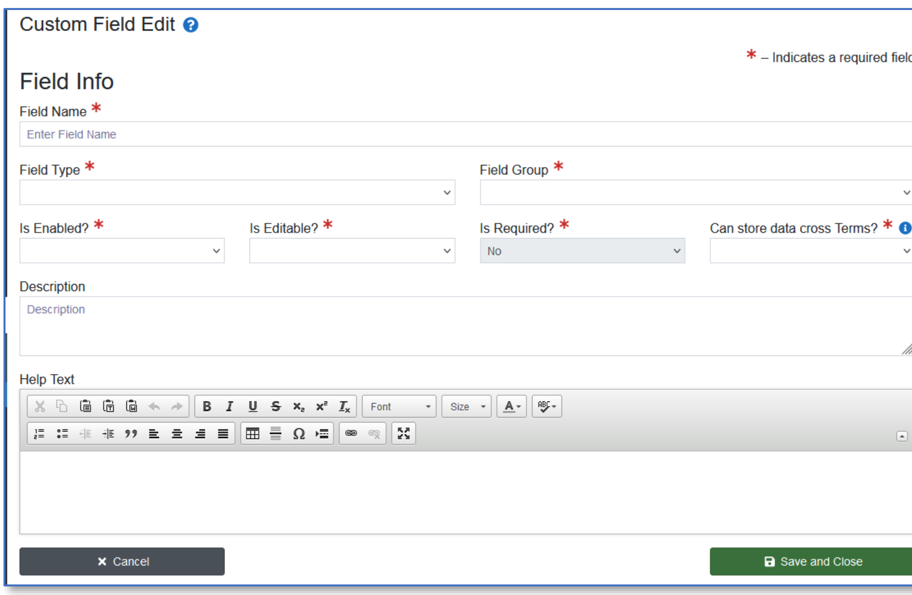
CUSTOM FIELDS

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.

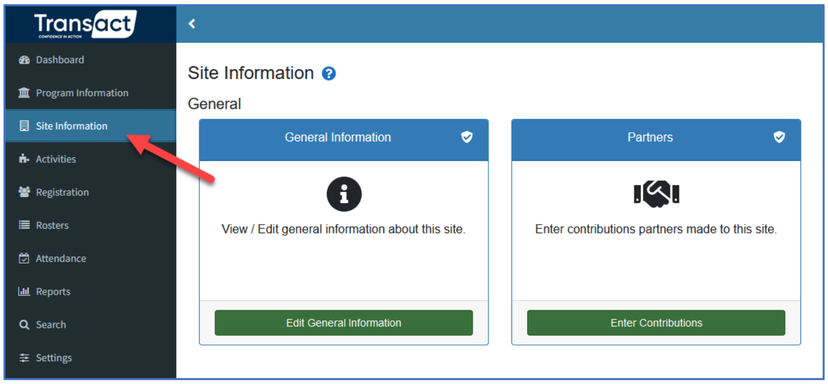
Note: Student will rarely, if ever, be entered manually. Thus, this feature mostly applies to adding adult records as parents/guardians or staff.

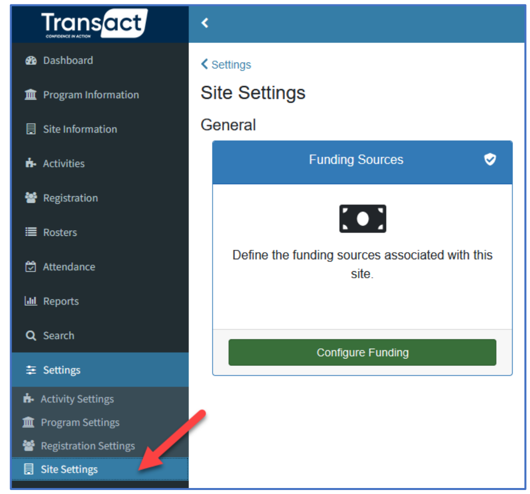
Configure Required Fields

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	☐	☑
At Least 1 Contact	☑	☐
Date of Birth	☐	☐
Email	☐	☐
Ethnicity	☐	☐
First Name	☑	☑
Gender	☐	☐
Grade	☐	☐
Home Address	☐	☐
Home City	☐	☐
Home State	☐	☐
Home Zip	☐	☐
Last Name	☑	☑
Limited English Proficiency (LEP)	☐	☐
Lives With	☐	☐
Lunch Status	☐	☐
Mailing Address	☐	☐
Mailing City	☐	☐





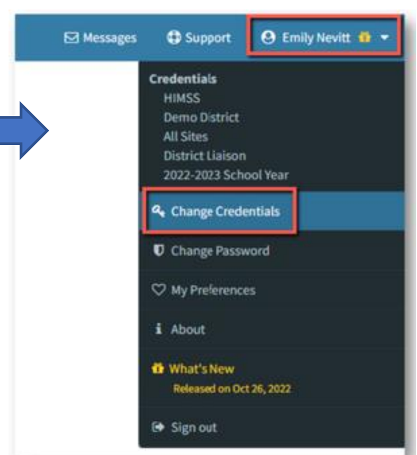
SCHOOL SITE INFORMATION

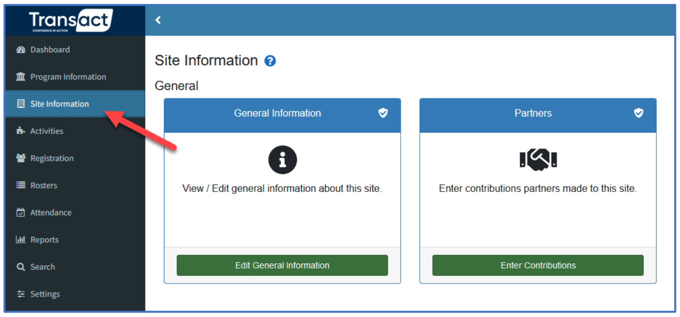
- ✓ General Information
- ✓ Partner Contributions
- ✓ Funding Sources

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

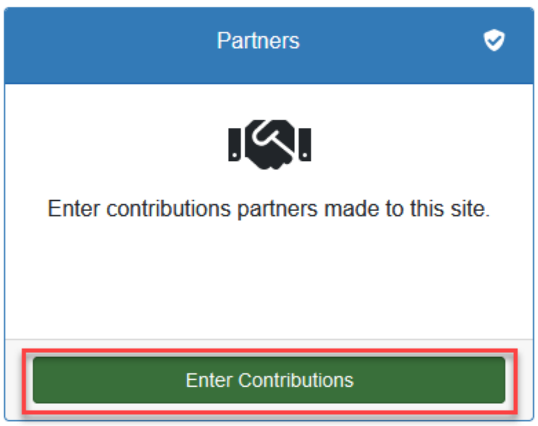
- Change Credentials and connect to a specific school site when modifying school site information.
- While some system values may be the same across the entire program, Site Information must be configured for each active school site in HIMSS individually.





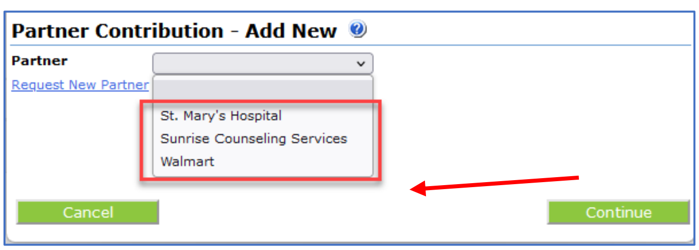
ADD / EDIT PARTNER CONTRIBUTIONS

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

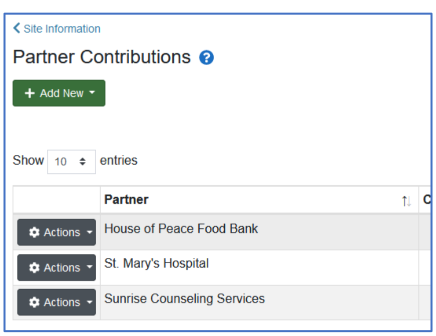
1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Partners' card
3. Click 'Enter Contributions'



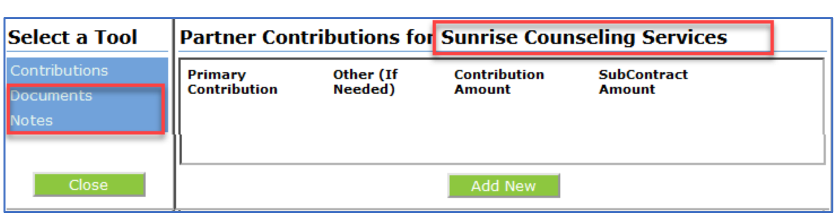
Add a New Partner Contribution

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.
   - 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 leve 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.

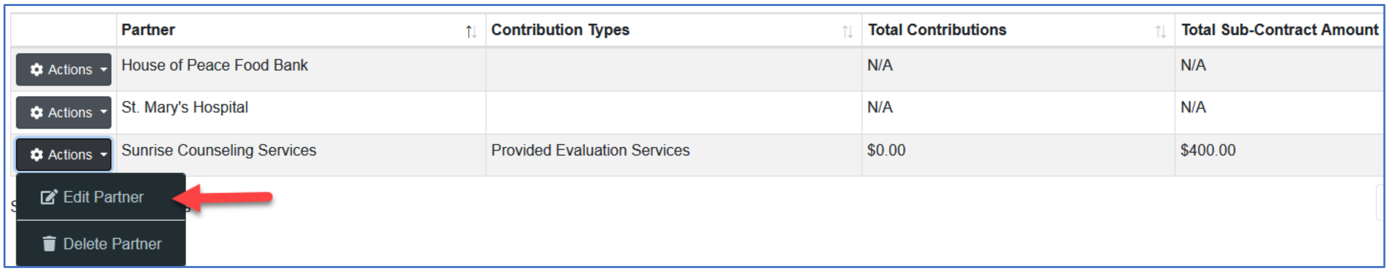


4. A pop-up screen where contributions details can be entered will appear. Note, in addition to contributions, Documents (such as contracts or MOUs) and Notes can be added for this Partner.
5. Click the Add New button.



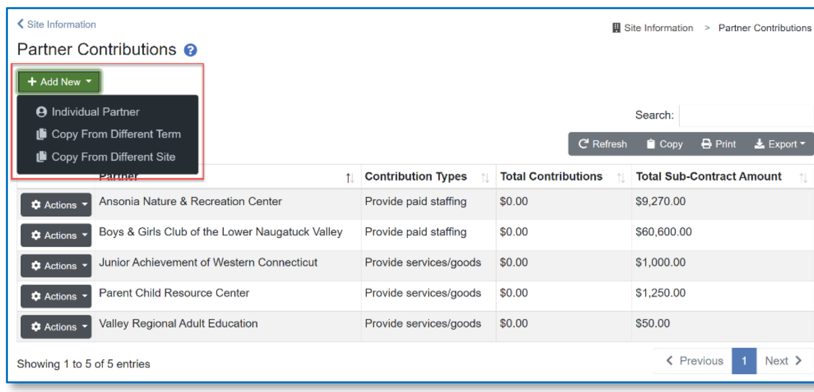
Editing a Partner to Add Additional Contributions

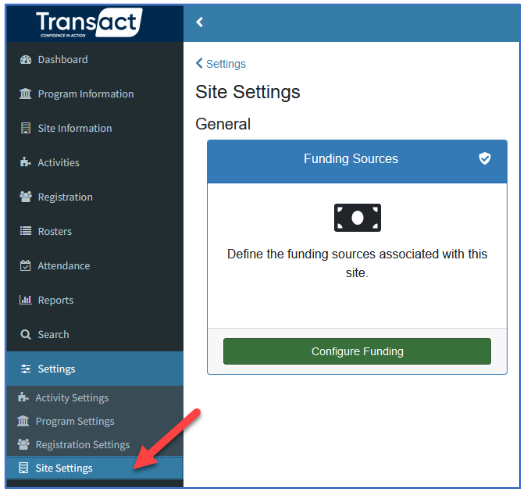
Partners can make multiple contributions during a Term. Use the Edit partner menu item under ‘Actions’ to access the Partner record and add additional Contributions, Documents, or Notes.



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.



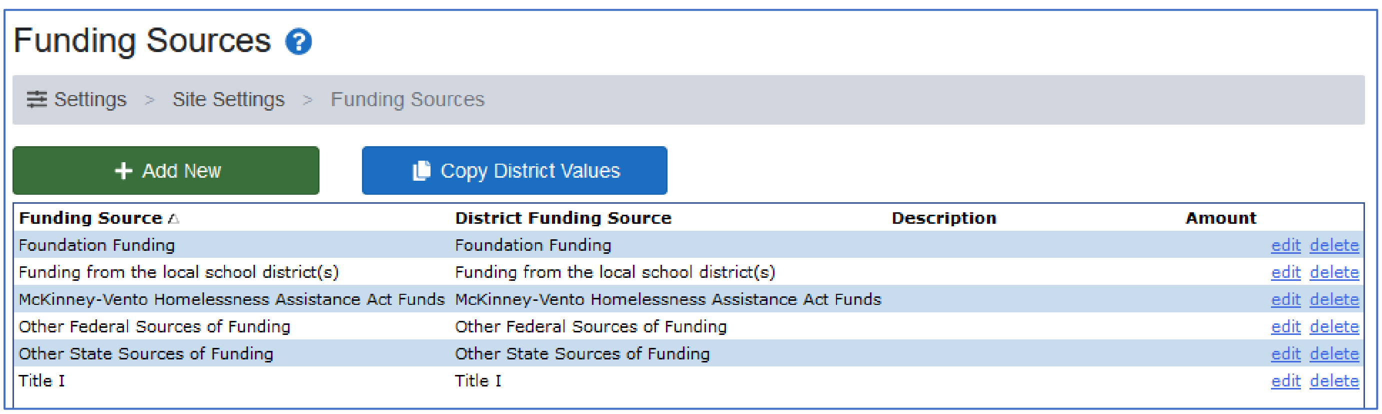


ADD/EDIT FUNDING SOURCES

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

Configure Funding

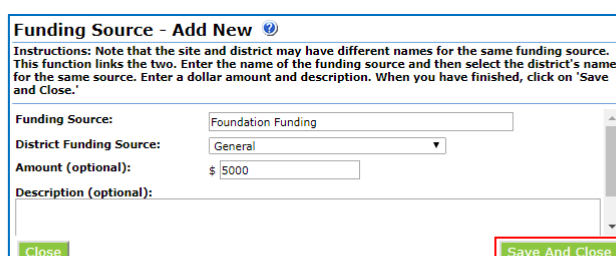
1. In your left-hand navigation menu, click ‘Settings’ → ‘Site Settings’
2. Locate the ‘Funding Sources’ card
3. Click ‘Configure Funding’

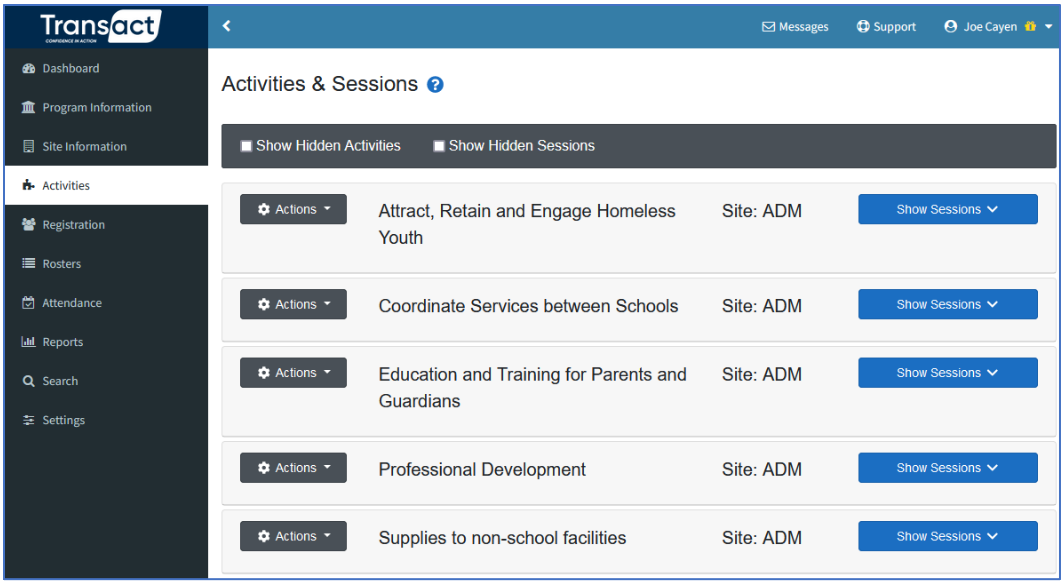


Funding Source	District Funding Source	Description	Amount	
Foundation Funding	Foundation Funding			edit delete
Funding from the local school district(s)	Funding from the local school district(s)			edit delete
McKinney-Vento Homelessness Assistance Act Funds	McKinney-Vento Homelessness Assistance Act 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’





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

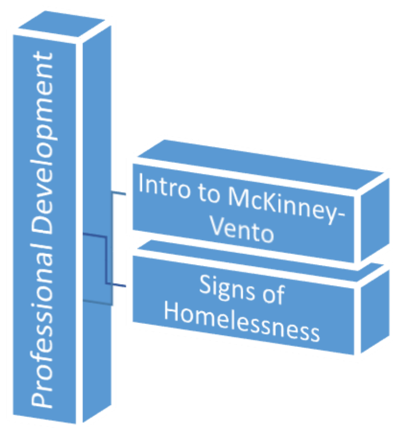
- Activities are associated with one school site; thus, they must be created and edited while logged into that site.
- Funding Sources for the school site **must** be set up prior to adding Activities.
- Activities can be copied from one school site to another. However, site-specific information such 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?

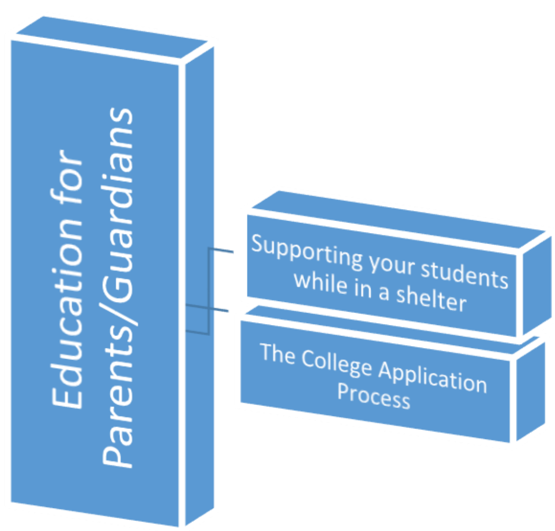
When setting up your Activities and Sessions, think about the Activities being more of a broad service category and the sessions being more specific.

Below are a few examples of Activities and Sessions.

Activity **Sessions**

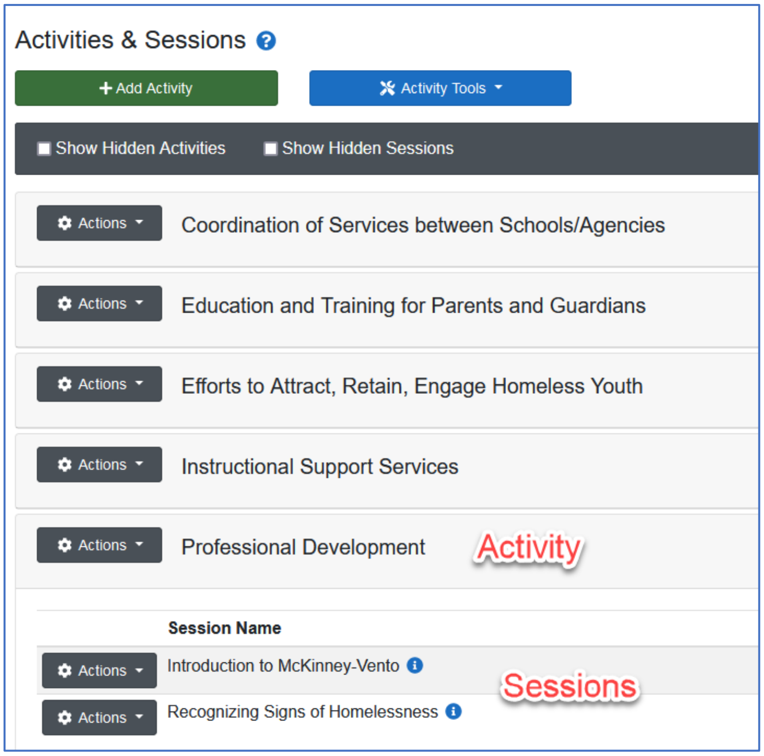


Activity **Sessions**

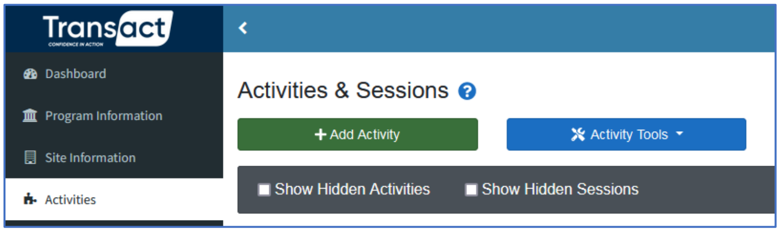


Activity **Sessions**

Here is how Activities and Sessions appear in HIMSS



ACTIVITIES



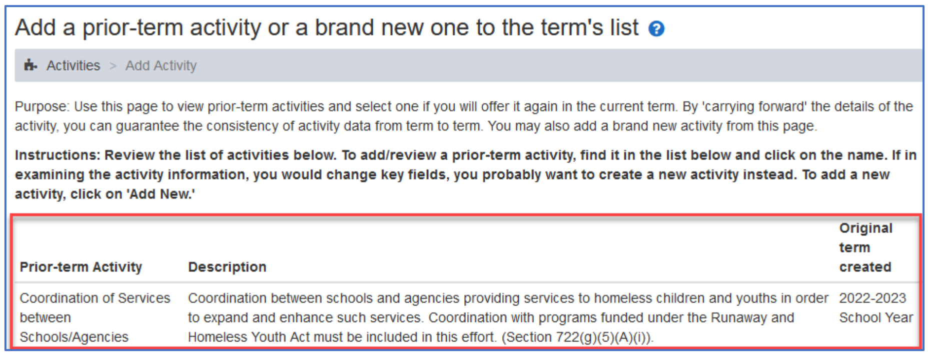
To Add an Activity

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)



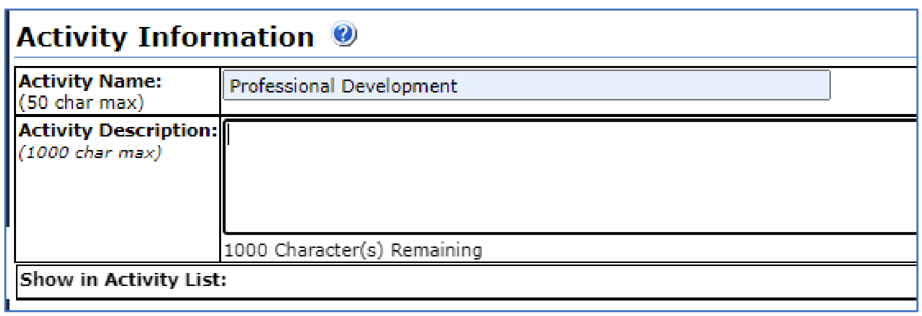
Add a prior-term activity or a brand new one to the term's list

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



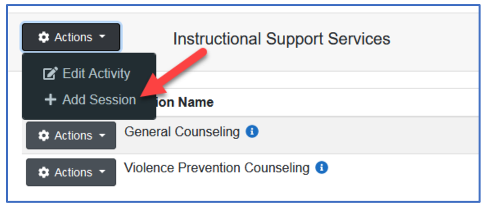
Notes

- 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)

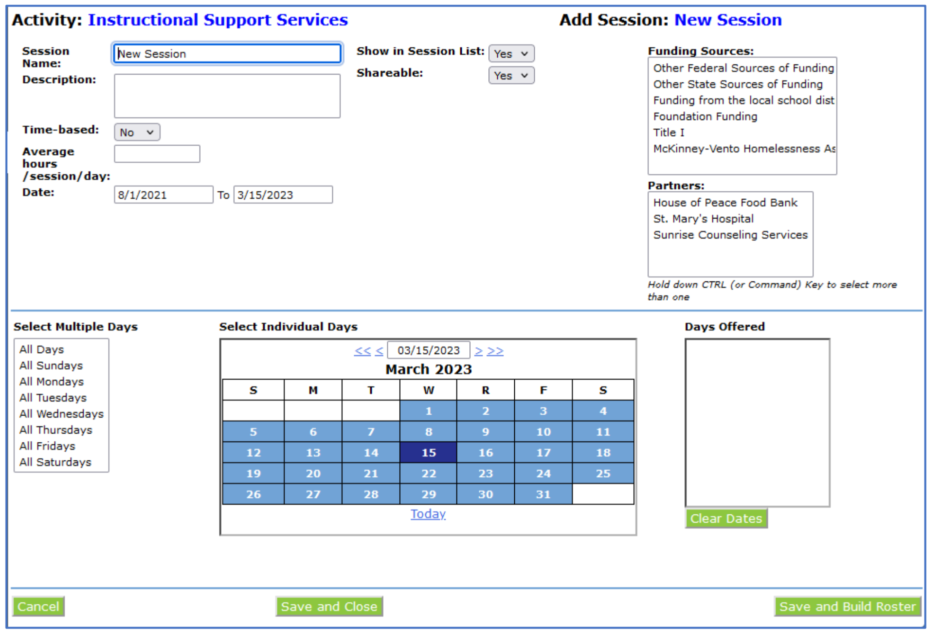
SESSIONS

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'



Adding Additional Sessions

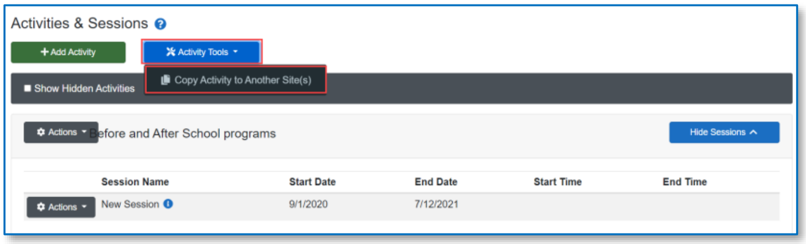
1. More than one Session can be added to an Activity.
2. From the Activities screen, find the Activity to which you need to add a session
3. Click the 'Actions' button next to the Activity name
4. Click 'Add Session'
5. Complete all fields
6. Click 'Save and Close'

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.

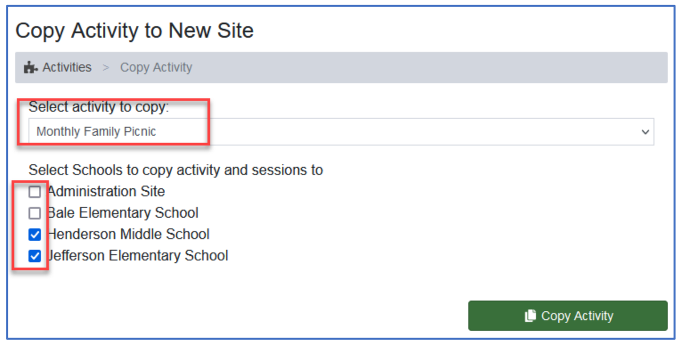
COPY AN ACTIVITY

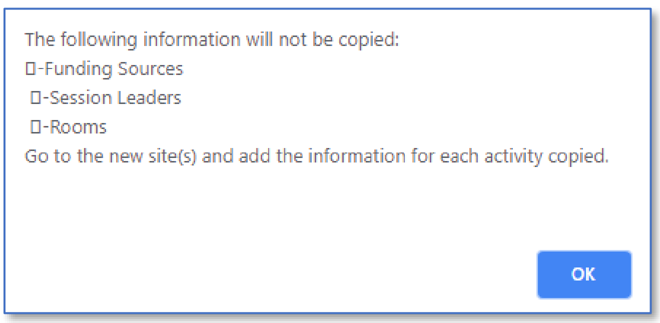
Use this time-saving functionality to copy an activity to one or more school sites.



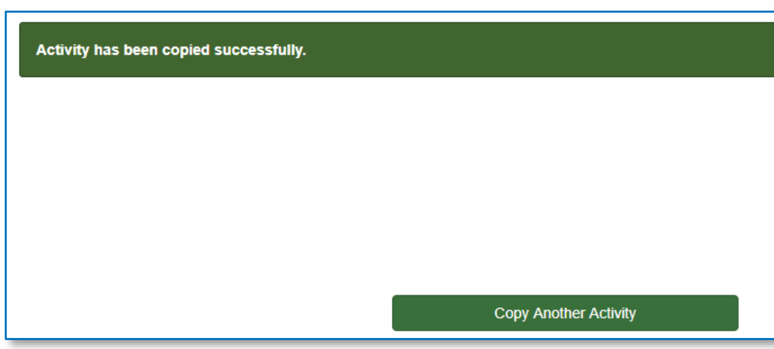
To copy an activity to other school sites

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'





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'



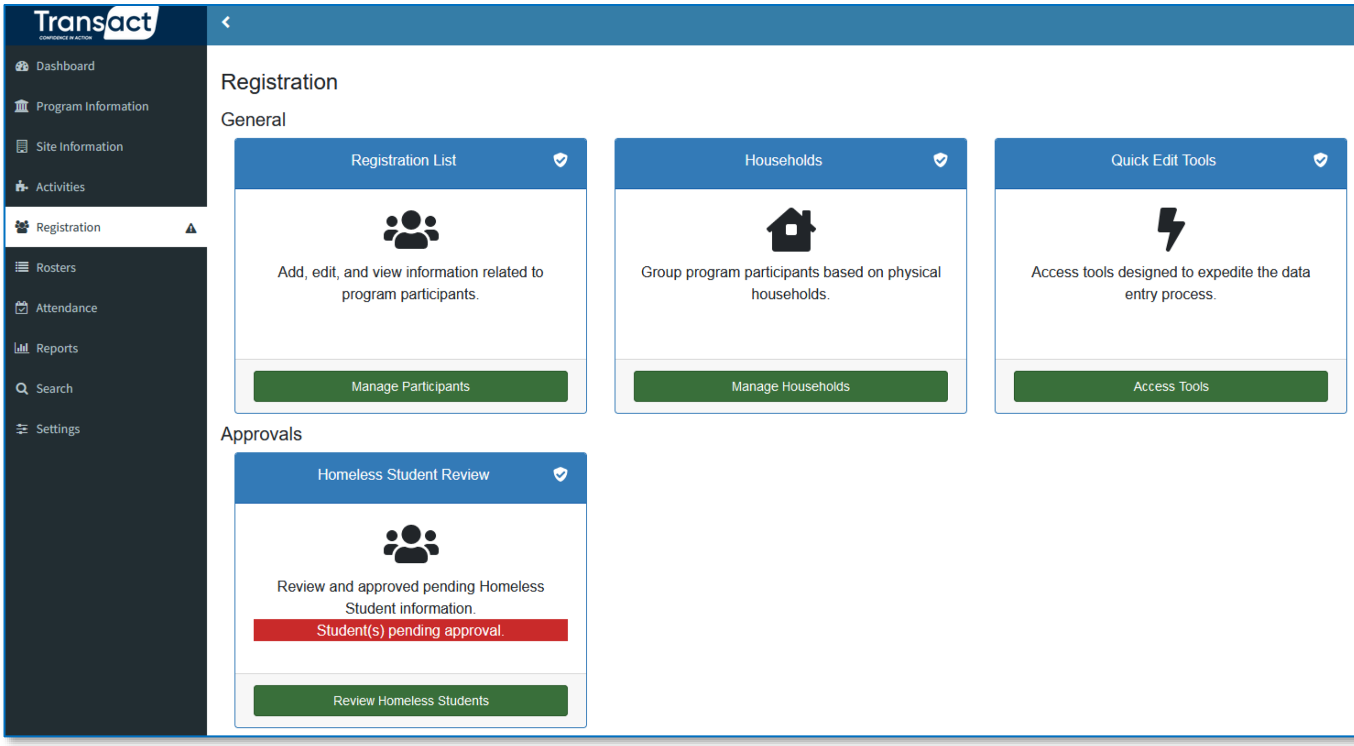
REGISTRATION

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.



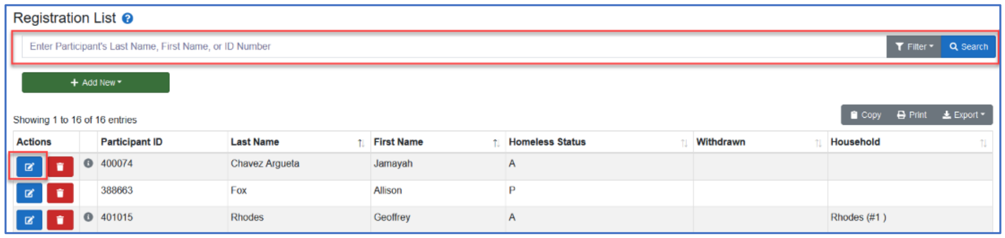
There are four cards on the Registration section.

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.

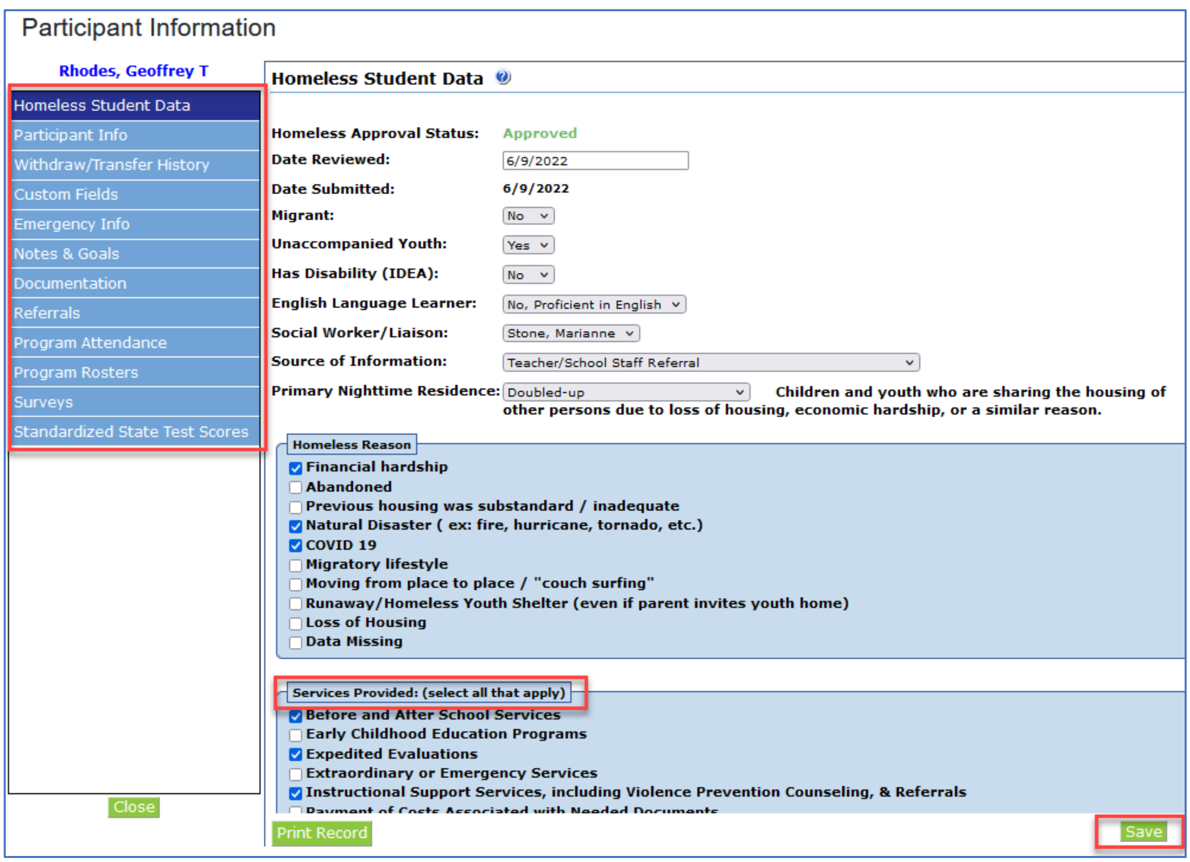
MANAGE PARTICIPANTS

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.



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'



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.

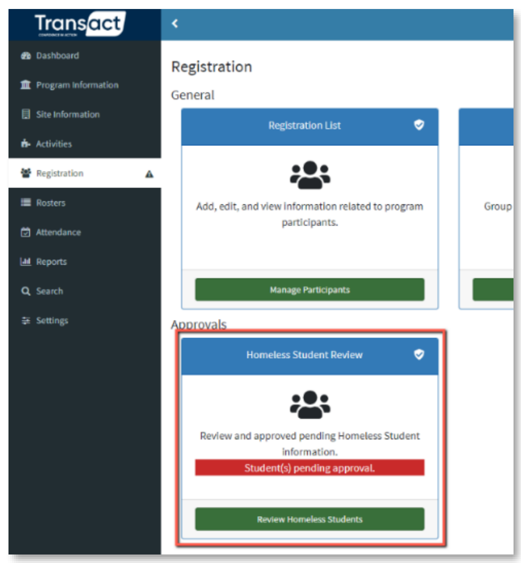
It is **then essential** to approve a student's record in HIMSS. The student's homeless status is not being approved, the HIMSS record is. This is essential to take advantage of the HIMSS communication system and gather data for reporting.

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

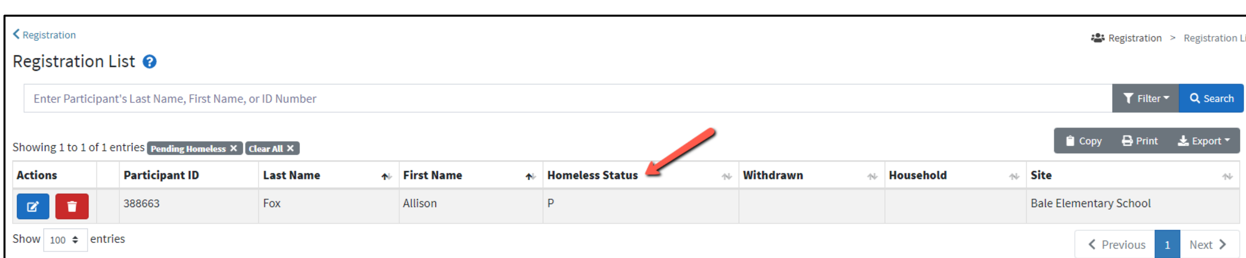
1. A **social worker** will be assigned to the student and be sent an email indicating they have a new student to work with.
2. Those in the district that can **provide services** (namely school nutrition and transportation) can be notified of the newly identified student's needs
3. **Data can be recorded** 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

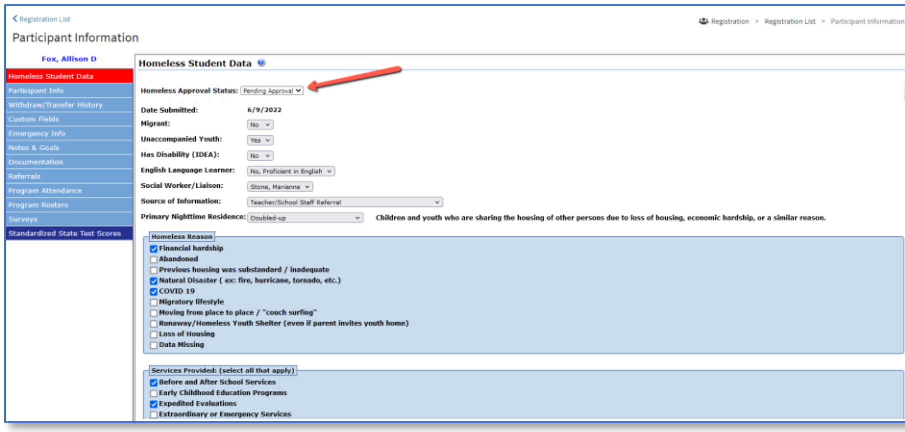
From the Registration main menu item, in the Homeless Student Review card, click the green Review Homeless Students. Note the red notification that says Student(s) pending approval – if this red notification is not present, no new flagged students have been imported from the SIS.



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



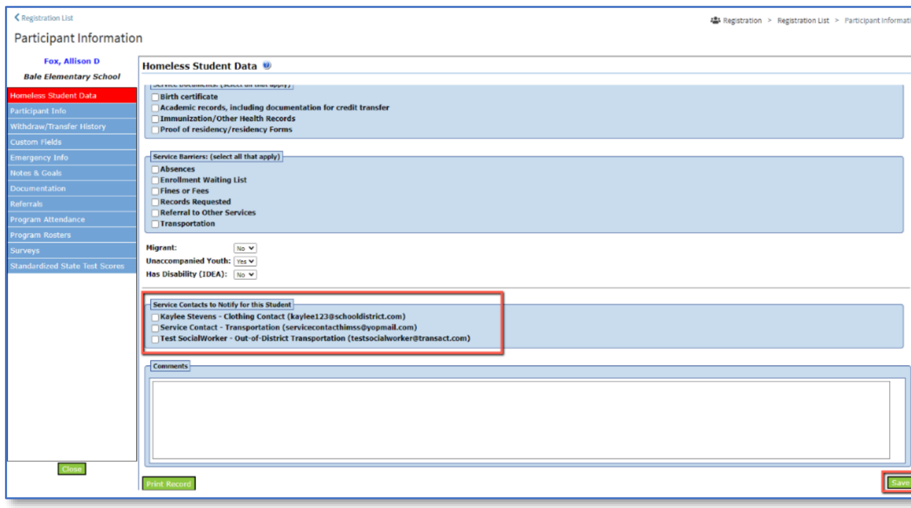
Click the blue pencil icon to open the student's record (image at right).



Some information, such as Primary Nighttime Residence, <u>may</u> 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.

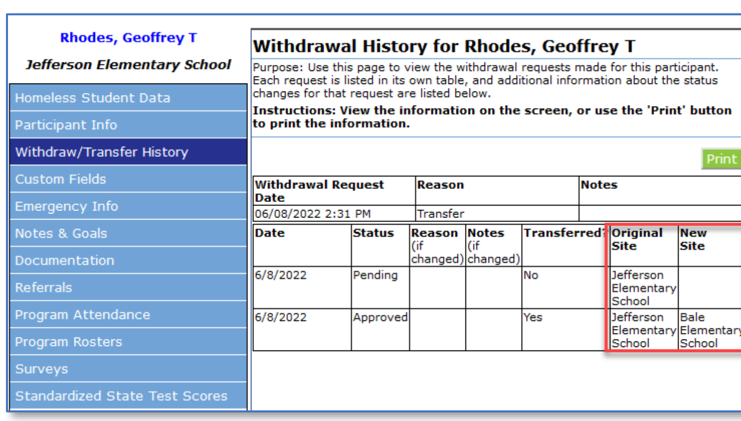
When the record is saved, emails will be triggered to notify the assigned social worker and other assigned service contacts for nutrition, transportation, etc.

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.

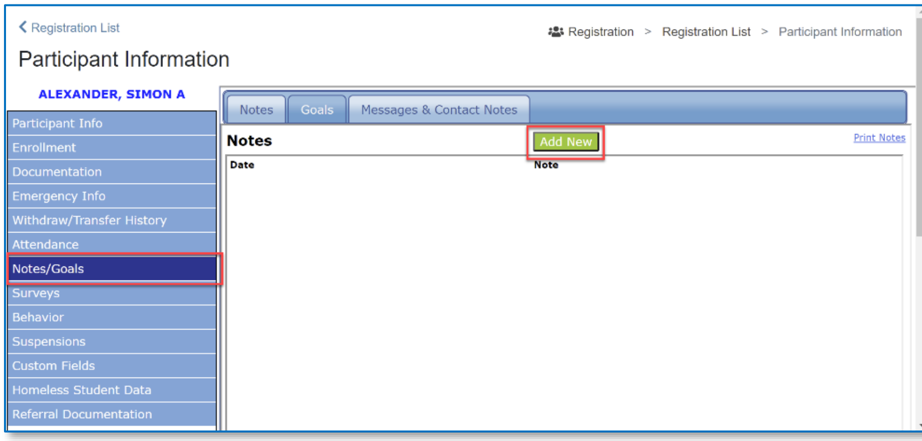


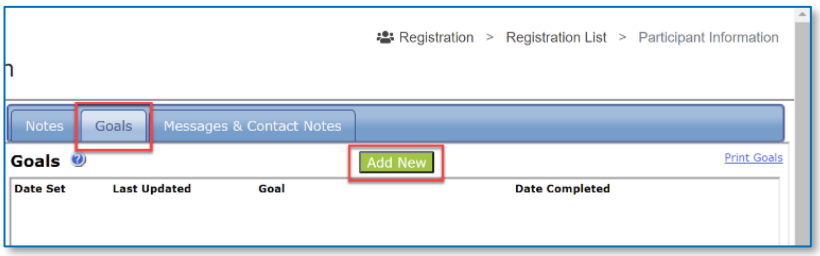
NOTES & GOALS

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.



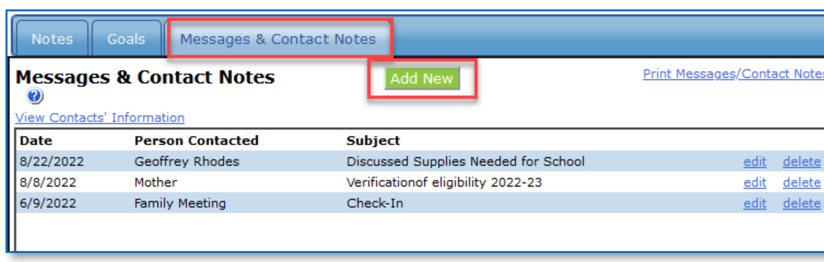


Entering Goals

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.

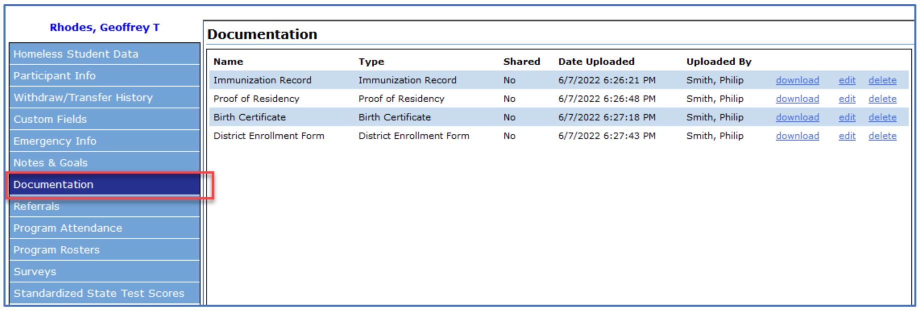


Notes

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.

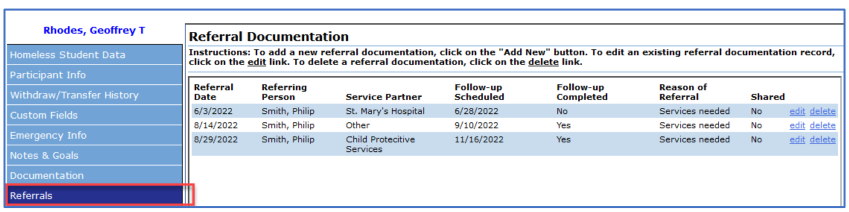


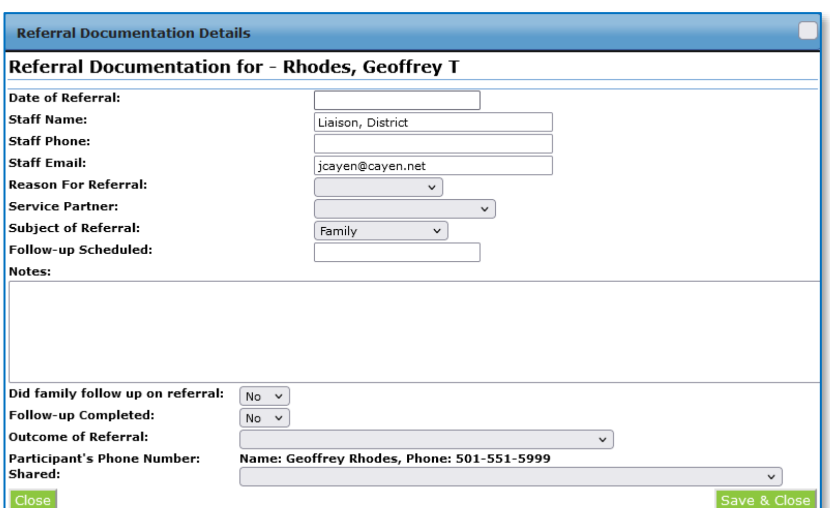
To Upload a Document

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.





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.
   - 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.

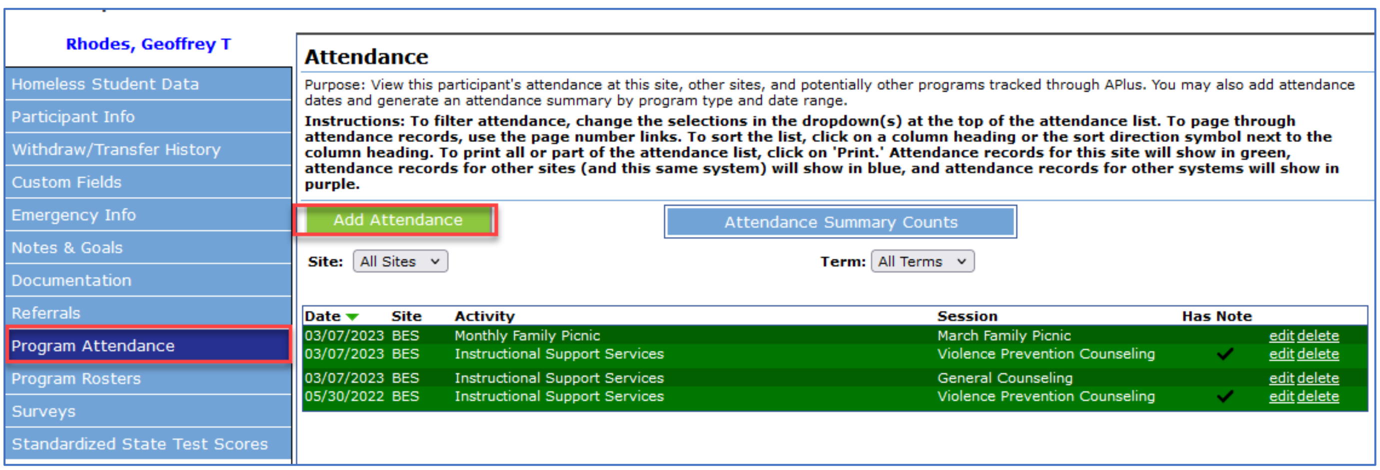
PROGRAM ATTENDANCE

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.

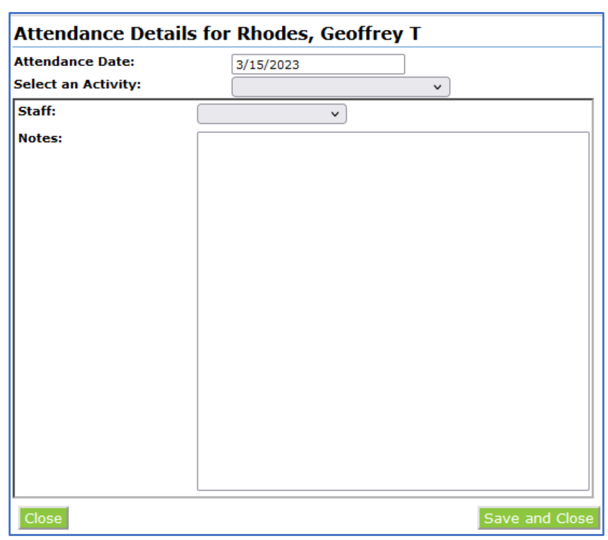
1. To track each date an individual participant receives a service, use this Program Attendance tab (details below)
2. To track each date more than one participant receives a service, use the Main Menu Attendance section (details in the Attendance section later in this guide.)
3. To track that a participant 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.



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'



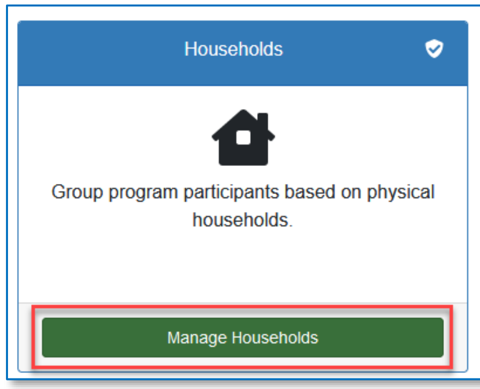
MANAGE HOUSEHOLDS

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

A few benefits of using households are:

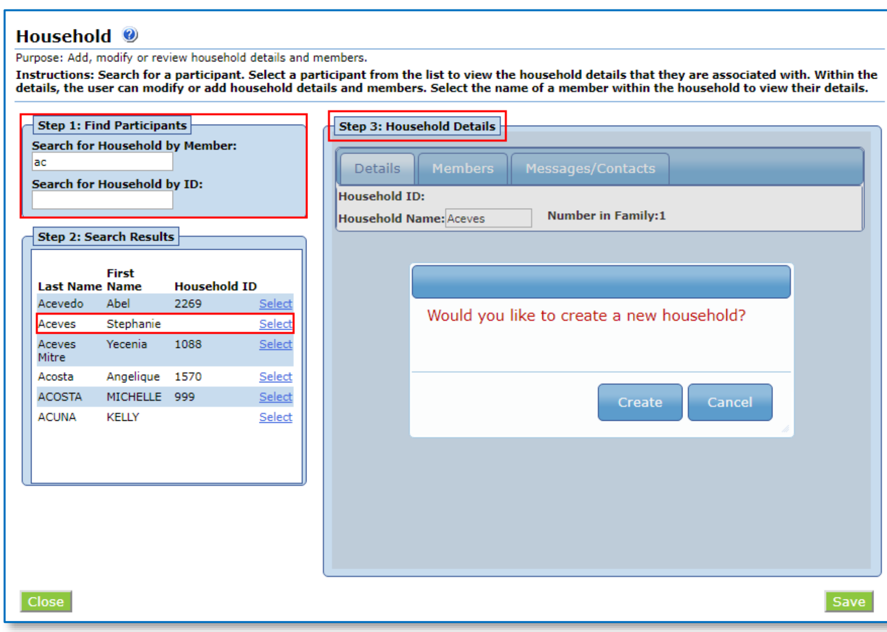
- If services are tracked in the HIMSS attendance section, the Family Participation Report can be generated. This report shows how many hours of service individuals in the household have received as well has how many the family as a total have received.
- If there is a change to one member's address 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.

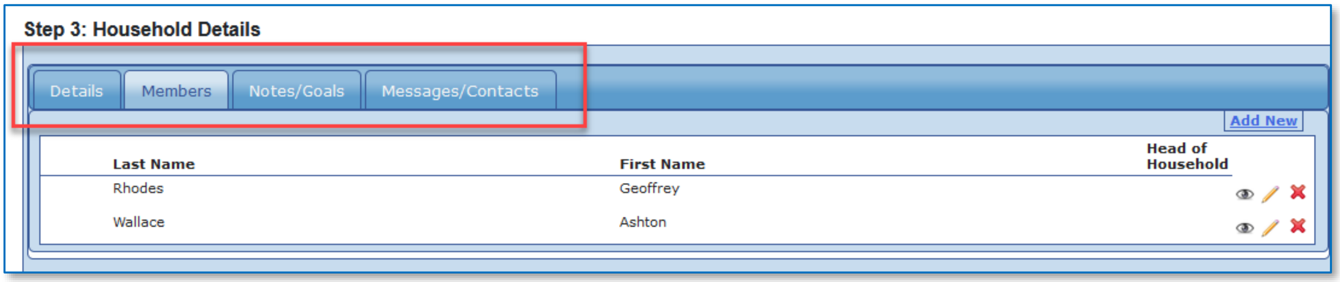


Follow these steps to create or edit a household

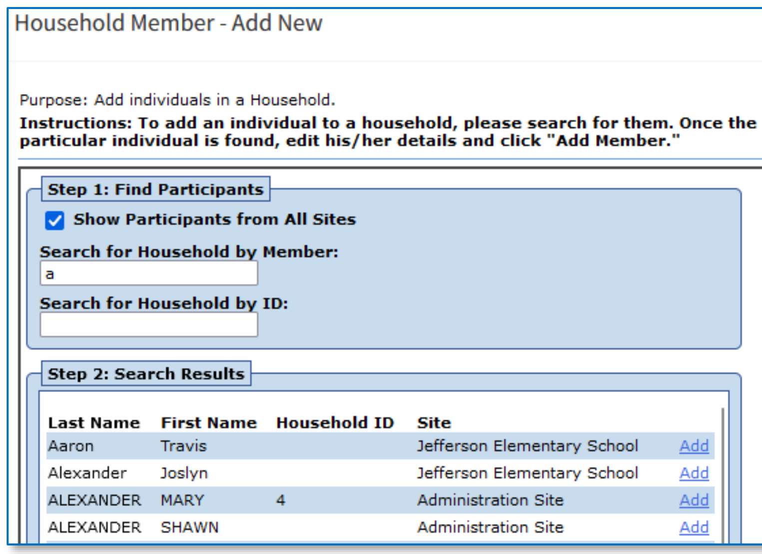
1. Search for participants by name or ID; note typing "a" will show all persons with a first or last name starting with "a"
2. Review the Search Results and click Select for the participant whose information you wish to view
3. View Household Details at the right and either create a household (if there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



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.

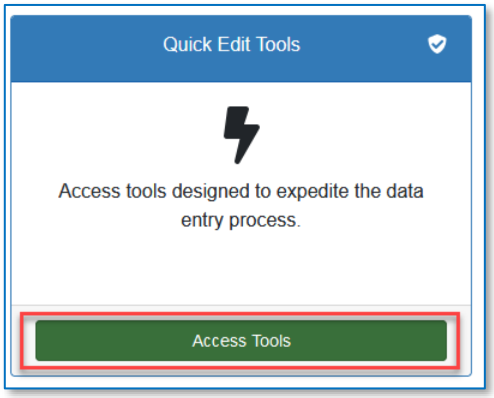
Note if trying to add an adult member and the adult is not found, use the Change Credentials feature to switch to the Administration site and add the adult to HIMSS in the registration area. You may then add the students to the Household from the Administration site where the adult record is saved, or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

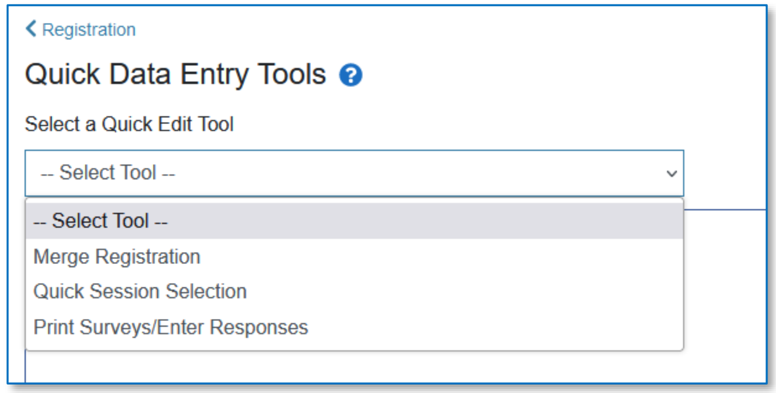
After clicking Add, a summary screen will appear. Click the green Add Member button and be sure to click the green Save button at the bottom of the screen to complete the process.

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.





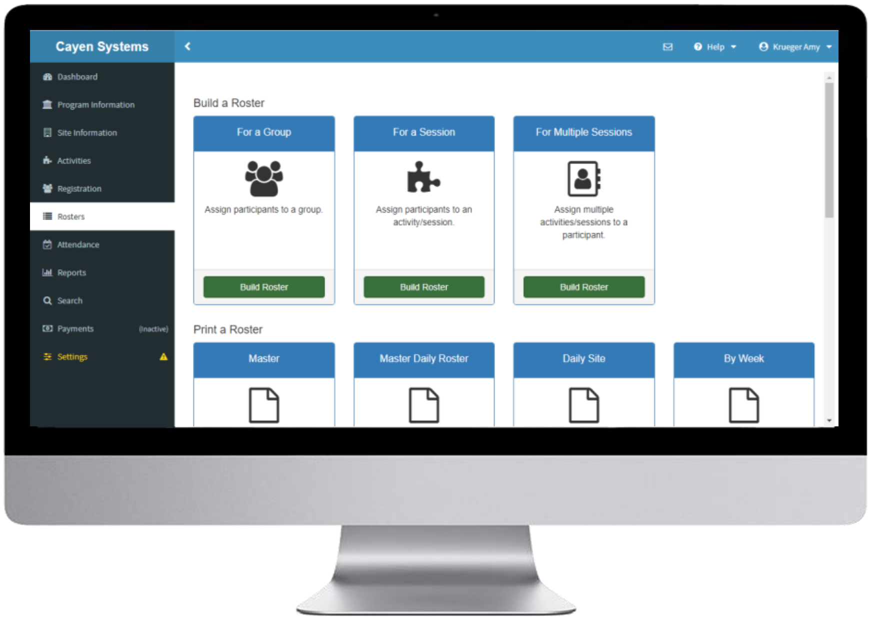
Enter this section by clicking on the Access Tools button in the Quick Edit Tools

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

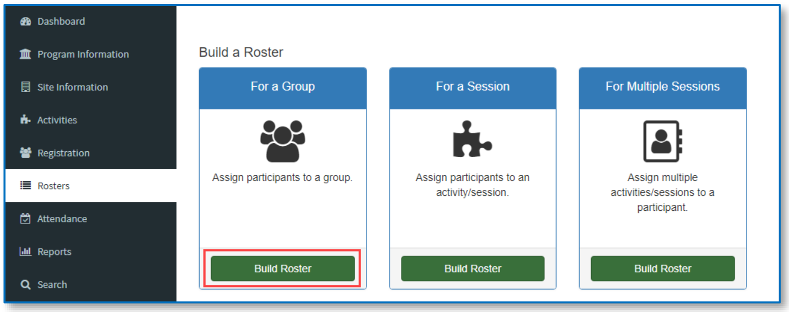
- **Session Rosters** are associated with specific sessions being offered at a school site. They list the names of those people that are expected to attend a particular Session of an Activity. It can eliminate the need for a sign-in sheet as names of those that do attend can simply be checked off on 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:

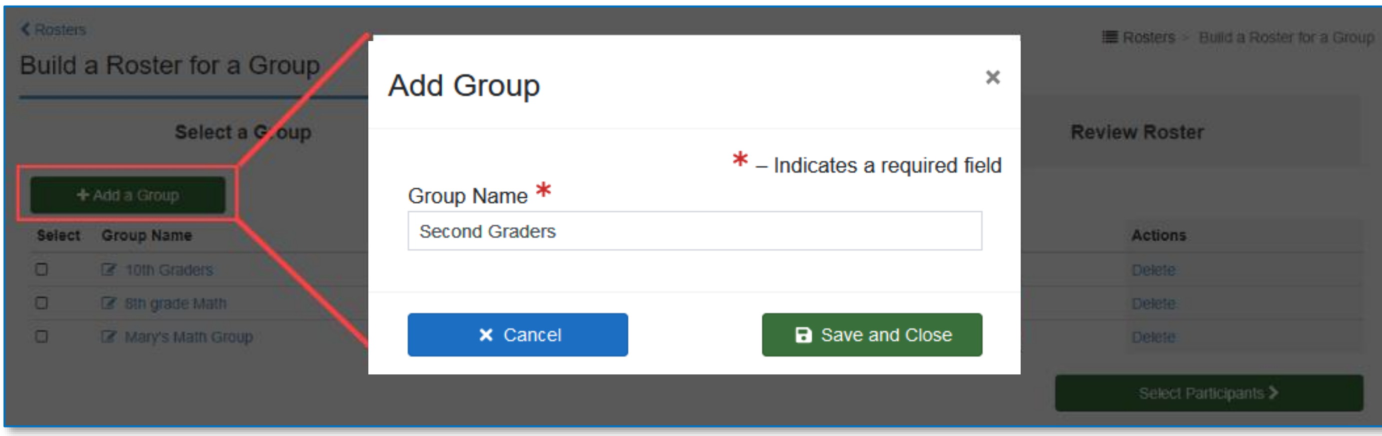
- ✓ Group Rosters
- ✓ Session Rosters
- ✓ Printing Rosters

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'

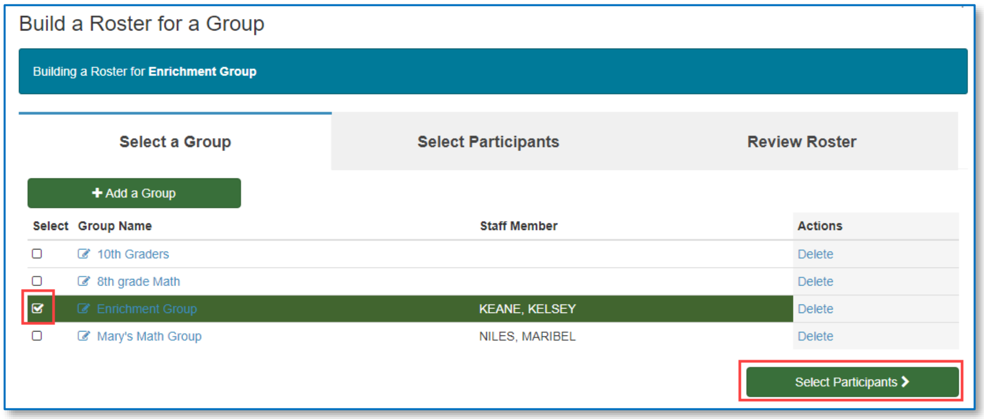


Add a New Group

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.

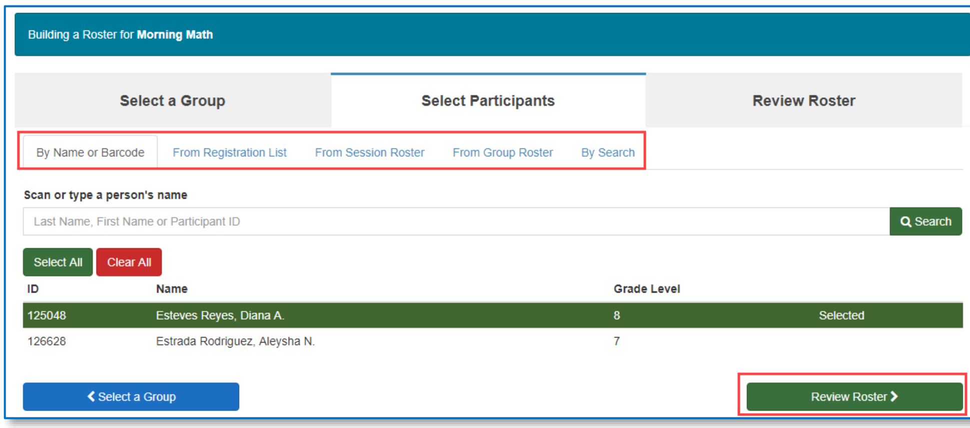


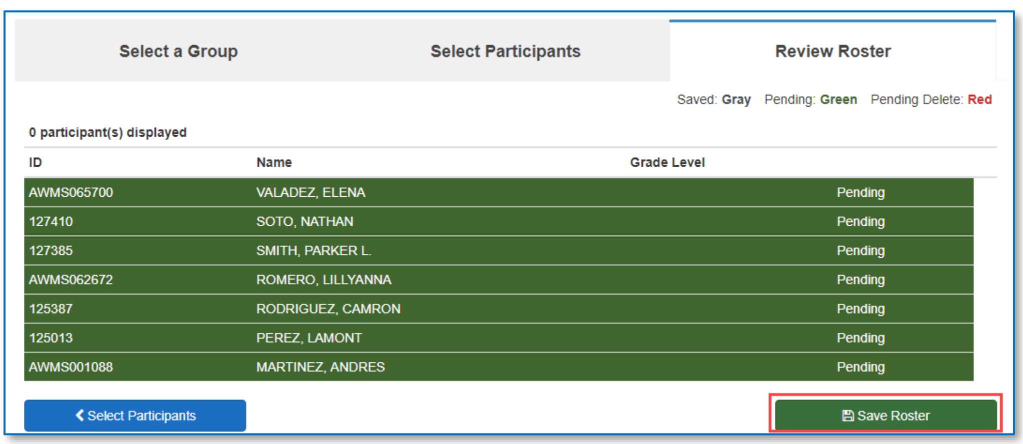
Add Participants to a Group

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





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.

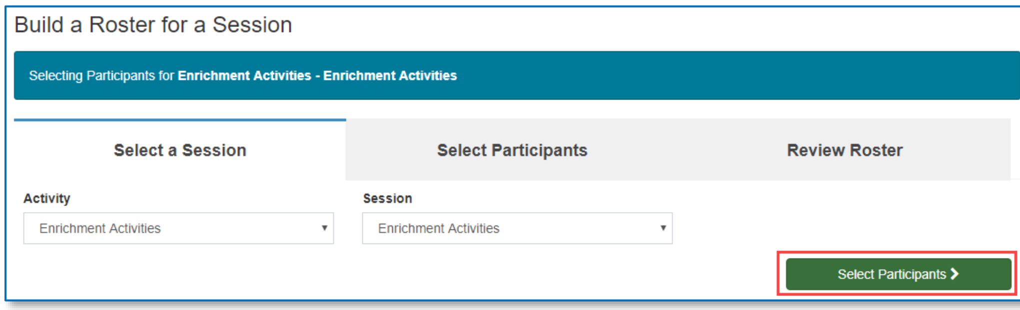
SESSION ROSTERS

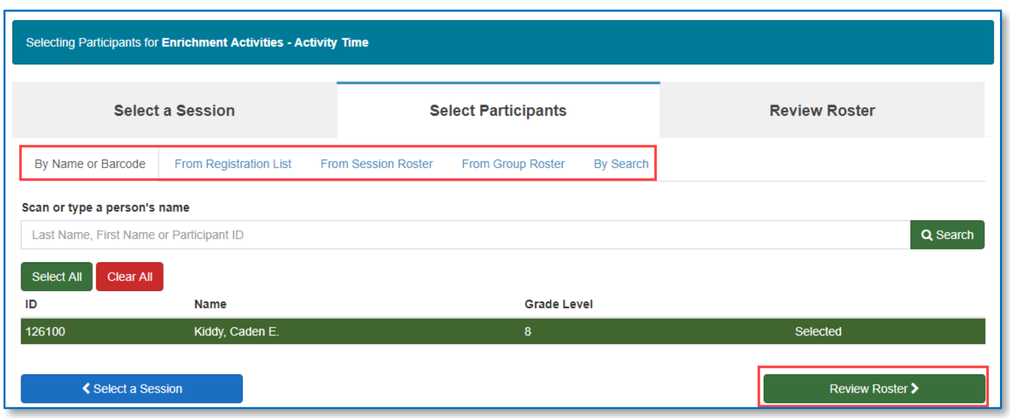
Build a Roster for a Session

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





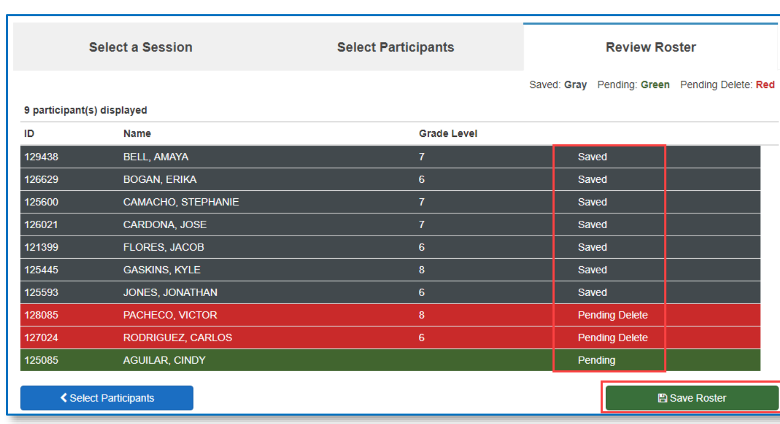
Select Participants

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

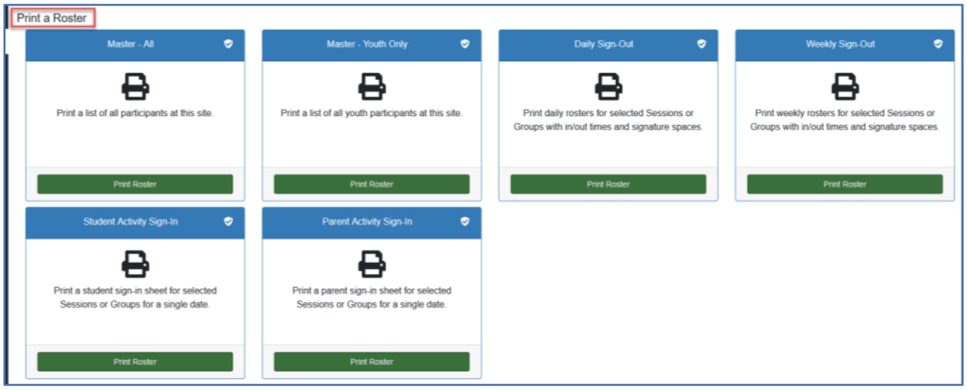
8. Review the list of participants.
9. Click on a participant name to remove it from the list (it will turn red)
10. Click ‘Save Roster’

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

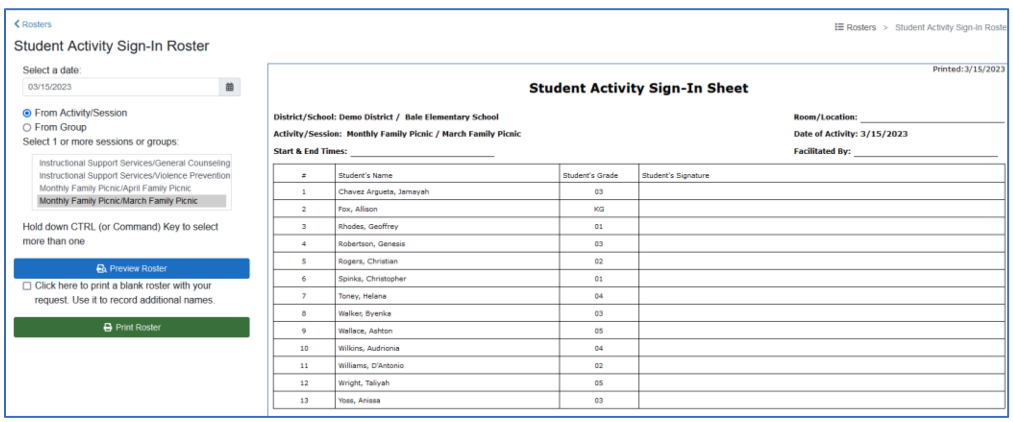
Group or Session Rosters can be used to record participation in Sessions or as sign-in/out sheets.+



Print a Roster

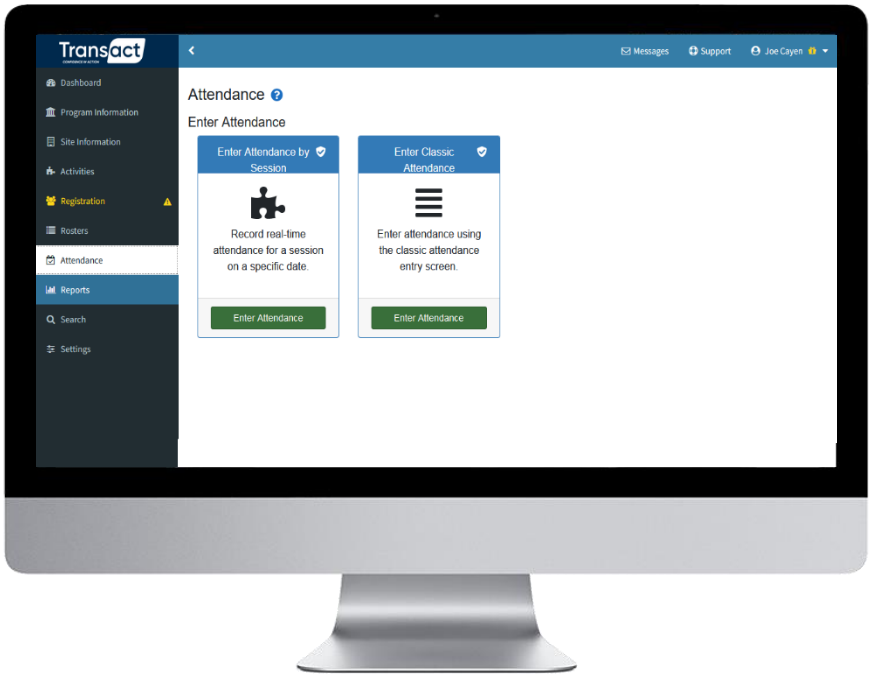
1. In your left-hand navigation menu, click 'Rosters.'
2. Scroll to the Print a Roster section.
3. Locate the card for the roster you wish to print. There are six options.
4. Click 'Print Roster' and a preview screen with options will appear.

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.



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 <u>individual</u> participant receives a service, use this Program Attendance tab (details in the Registration section above)
2. To track each date <u>more than one</u> 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)

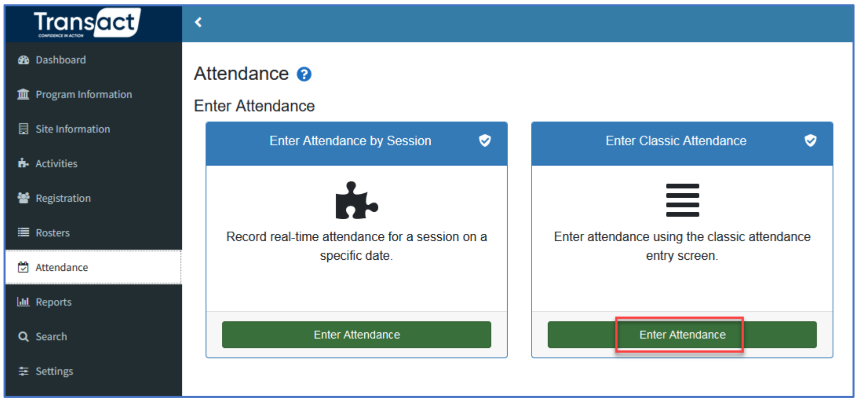
This guide section of will cover taking attendance (recording participation) for more than one person with these two methods:

- ✓ 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.

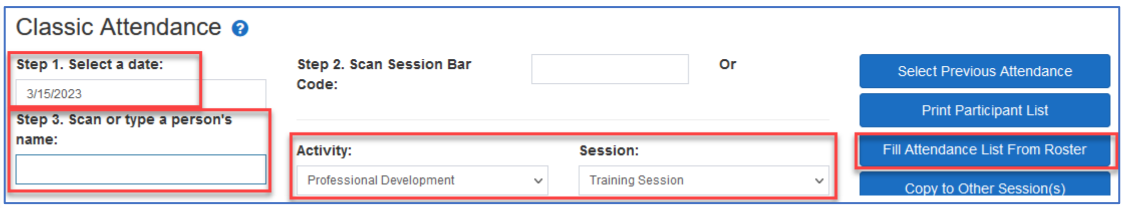
ENTER CLASSIC ATTENDANCE

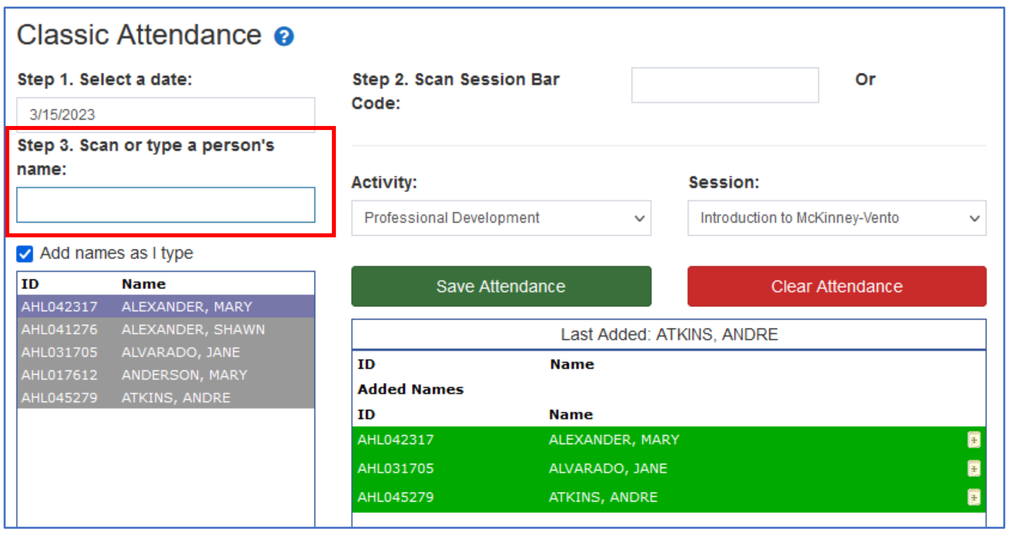


Enter Attendance

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:

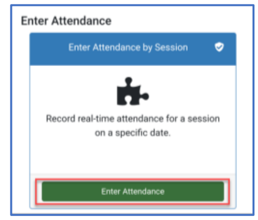
7. Type in part of the participant's last name and hit Enter or Tab on the keyboard. All matching records will show below in gray. If there is only one match, the name will move into the attendance list at right in bright green.
8. If there are multiple matches, click the correct participant's gray name (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

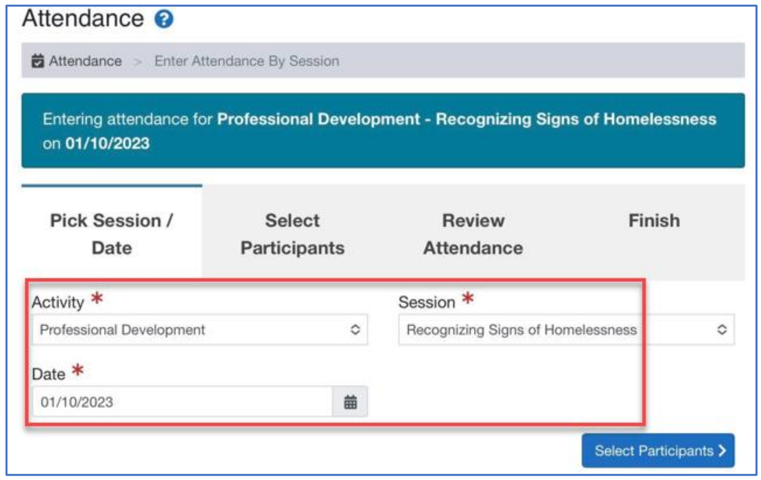
- Use the blue 'Select Previous Attendance button' to find and review/edit previously recorded attendance.
- If participants received more than one service, attendance can easily be copied from one session/date to another using the blue 'Copy to Other Sessions' button.

RECORD REAL-TIME ATTENDANCE

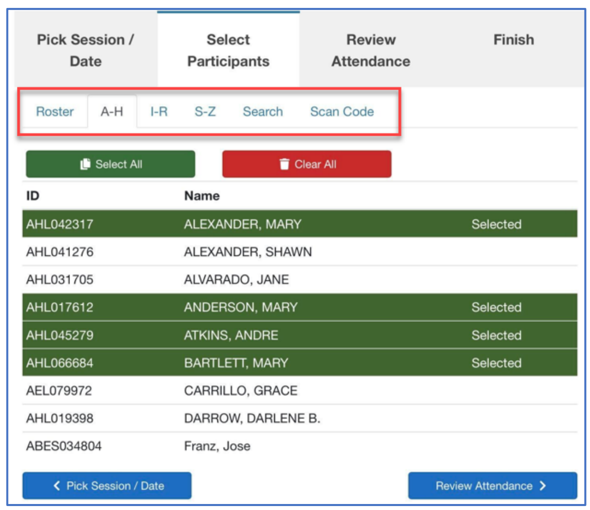
Real-time attendance can be recorded by staff using a mobile device such as a tablet or smart phone. This can reduce the need for paper attendance sheets and increase the speed of recording participation.



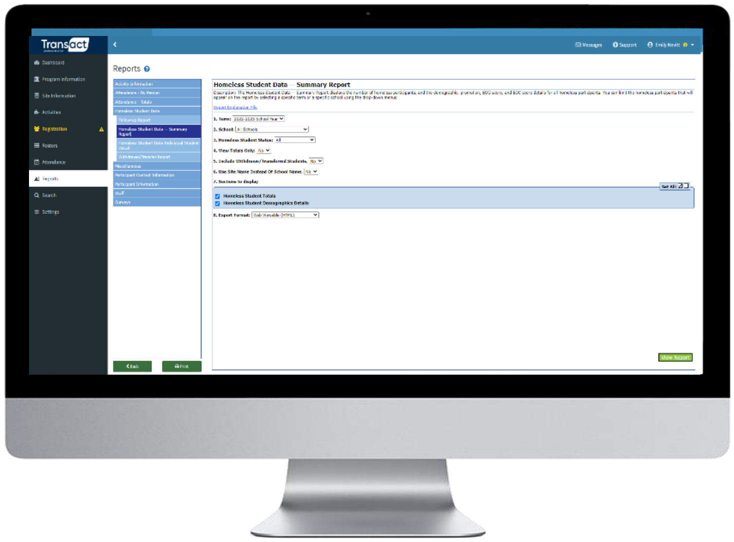
1. Use your smart device to access and login to your HIMSS website
2. In the left navigation menu, tap 'Attendance'
3. Locate the 'Enter Attendance by Session' card
4. Tap 'Enter Attendance' and the screen below will appear where you will pick the Activity, Session, and Date you wish to take attendance 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
   - 'Roster' (if a roster was created previously for this session),
   - 'Search' (uses the Search feature) or
   - 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



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.



REPORTS

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

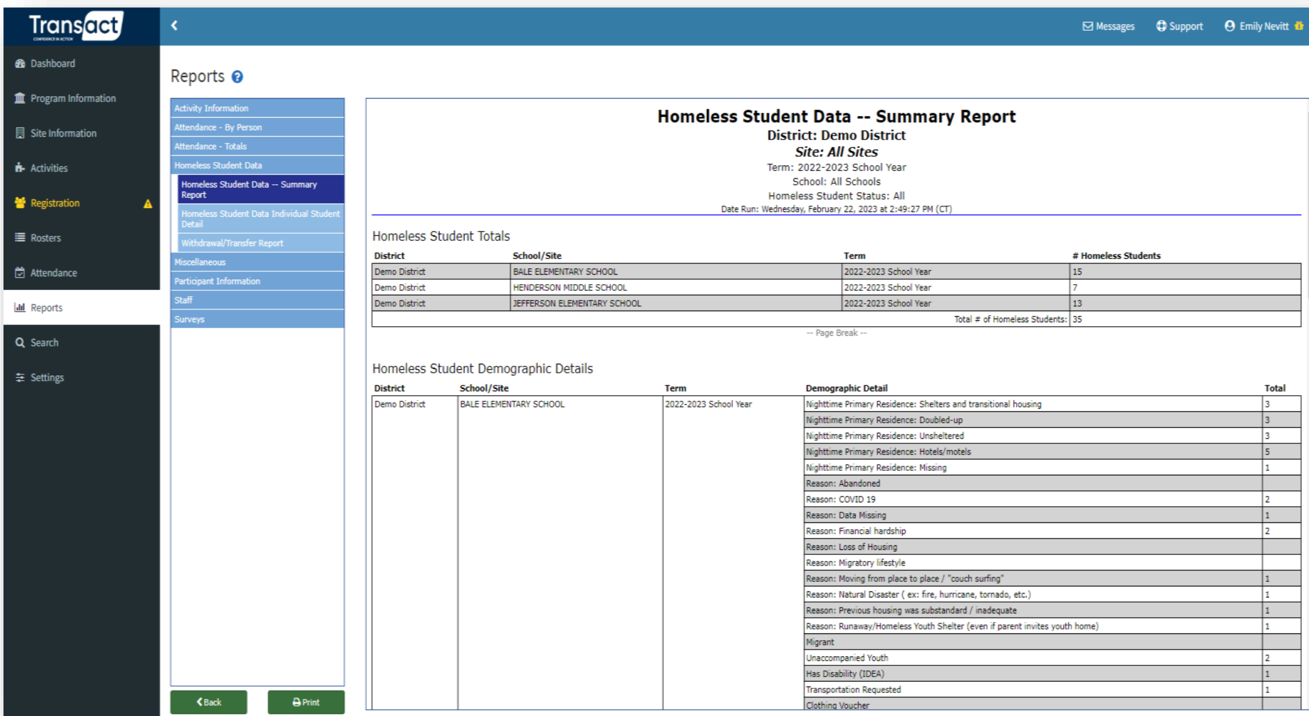
IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

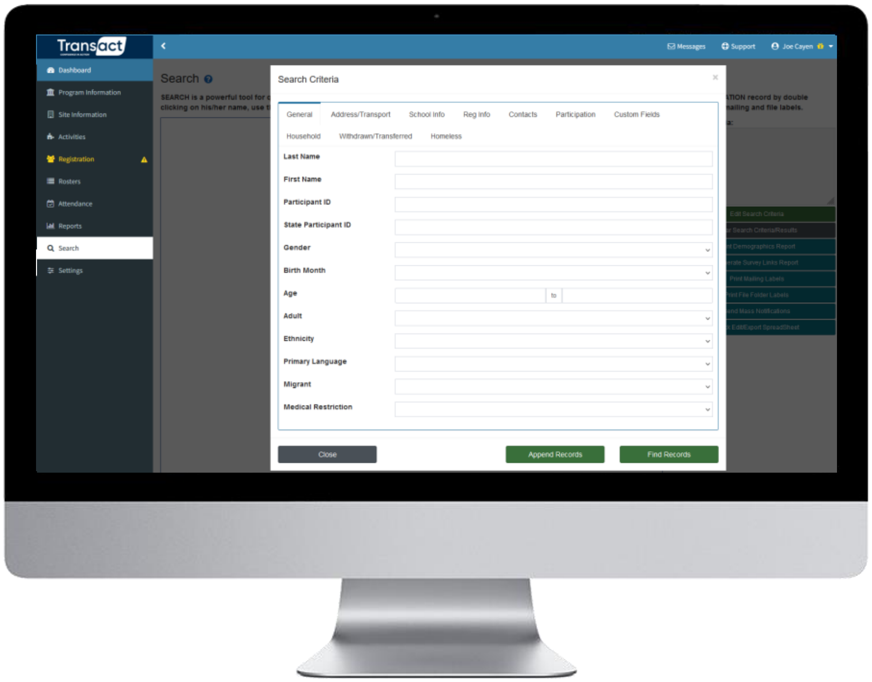
- On the main reports screen, a list of report categories will appear. Click a category to view the corresponding selection of reports.
- Refer to the description documentation for details on the report you want to generate. For details on how a report's data is generated, click the blue Report Explanation 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.





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

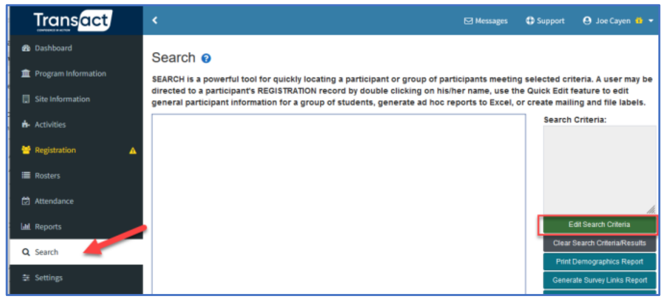
IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- 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.

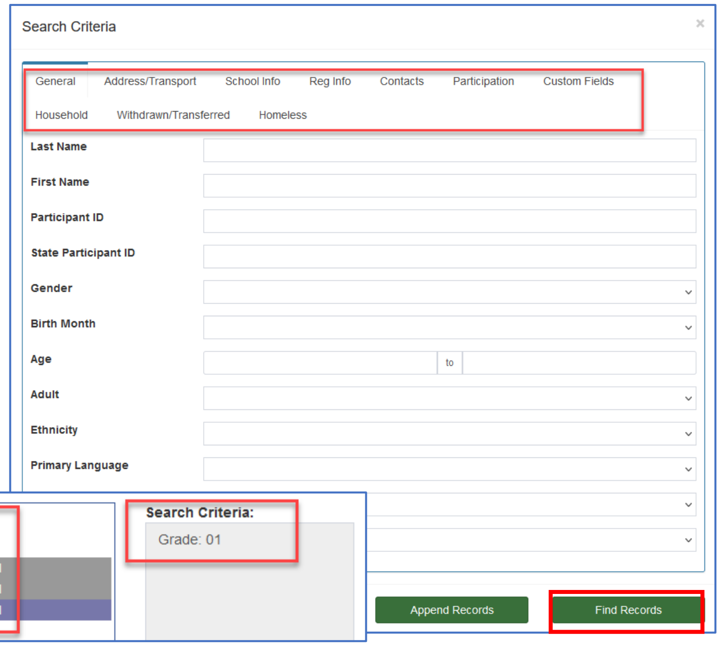
FIND RECORDS THAT MATCH CERTAIN CRITERIA

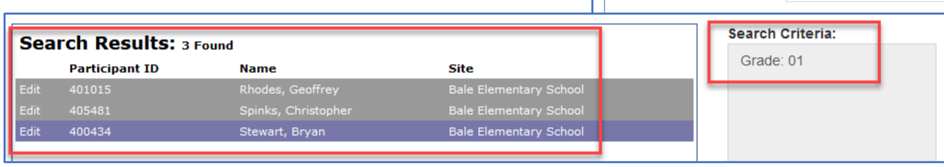
Find Records

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



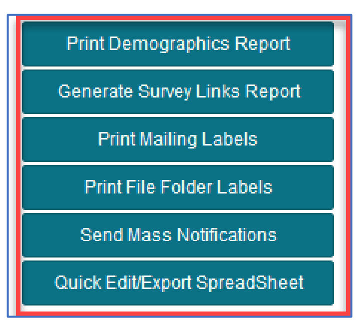


Append Records

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.

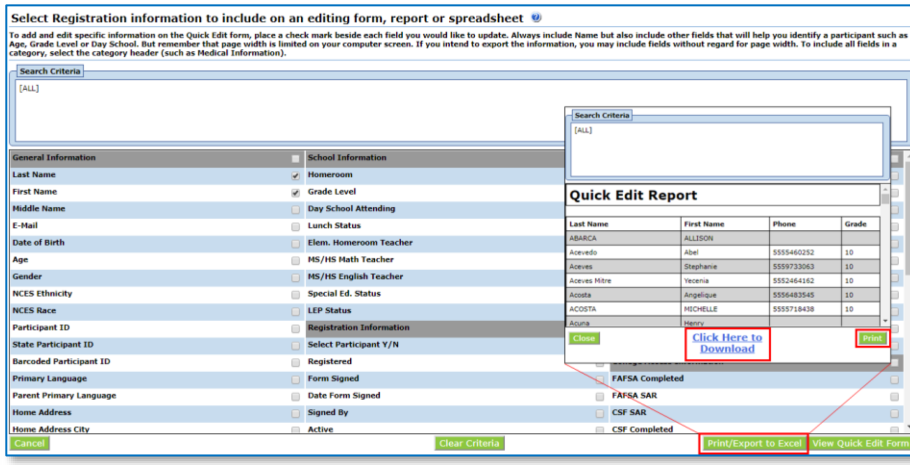
Once search results have been returned, there are numerous options of what to do with the results.

- 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



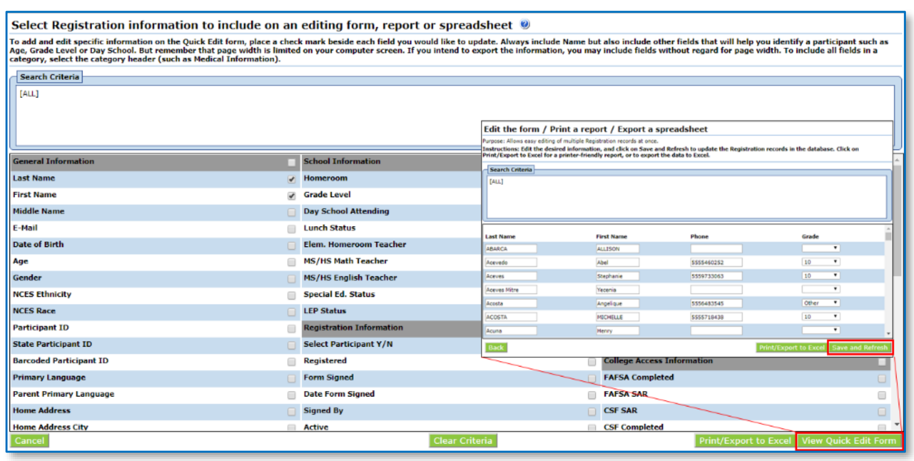
GENERATE CUSTOM REPORTS / EXPORTS

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.



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’



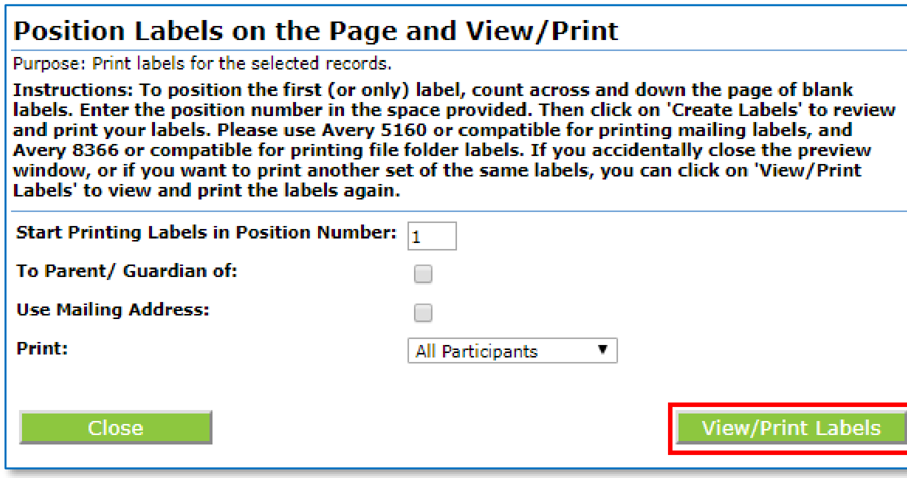
Tips

- 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

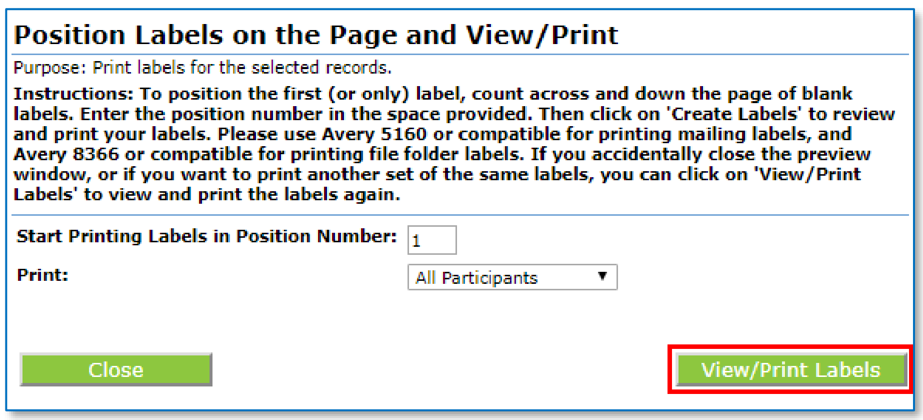
Print Mailing Labels

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



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

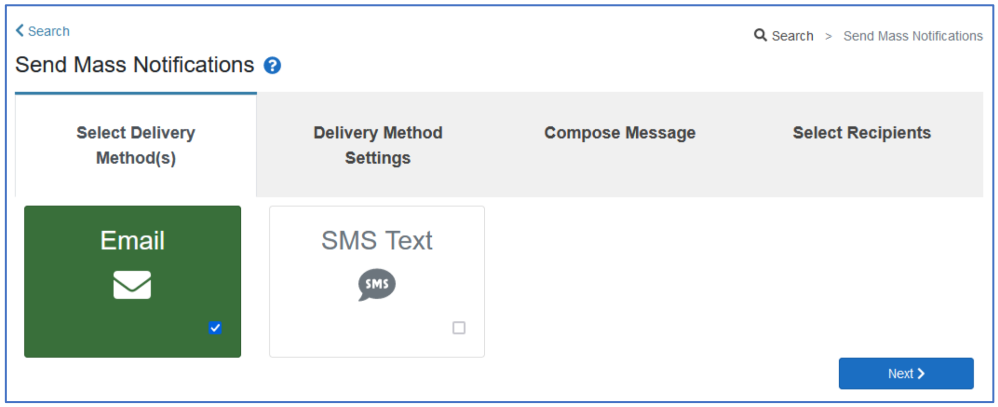


Tips

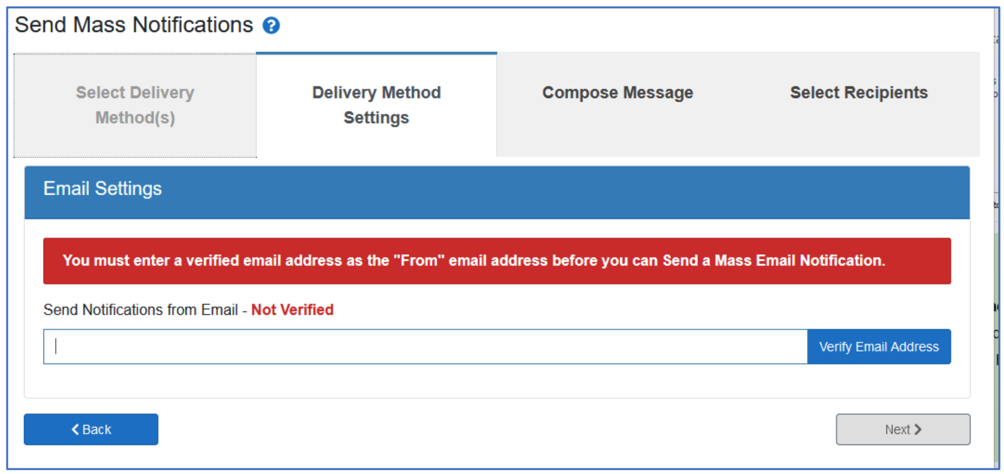
- When printing mailing and file folder labels, be sure review the instructions noted on the Position Labels on the Page and View/Print window.
- Use Avery 5160 (or compatible) labels when printing mailing labels.
- Use Avery 8366 (or compatible) labels when printing file folder labels.

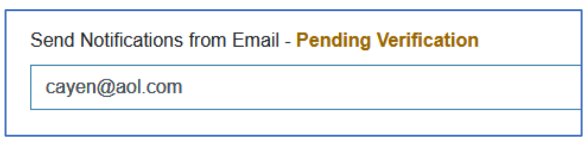
SEND MASS NOTIFICATIONS

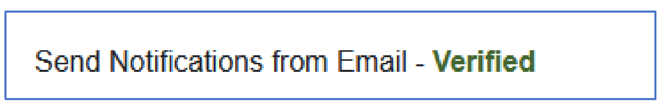
1. Once search results have been returned, click 'Send Mass Notifications.' A screen like the one to the right will appear opening a step-by-step process to generate communications with those persons found in the search.



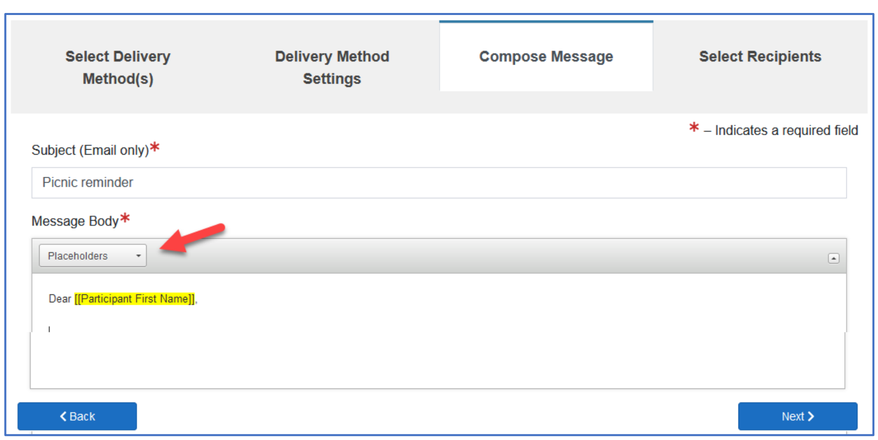
2. Email is the default Delivery Method. SMS text is available for a fee – contact your Account Manager for more details.
3. Click Next> to move to Email Settings (at right)
4. Enter the email address that emails sent from HIMSS will come FROM. Then click the blue 'Verify Email Address' button. A message 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







6. Enter a subject for the email and the message. Note the Placeholder drop down will allow you to interest 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 >'



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.