

# Family Application Messaging Tool

**Roles that Have Access:** Agency Admin, Intake & Eligibility Coordinator

The Family Application Messaging Tool allows enrollment specialists to communicate with families in a more streamlined way that is more direct and faster than the notes feature in the Applications and Waitlist grid.

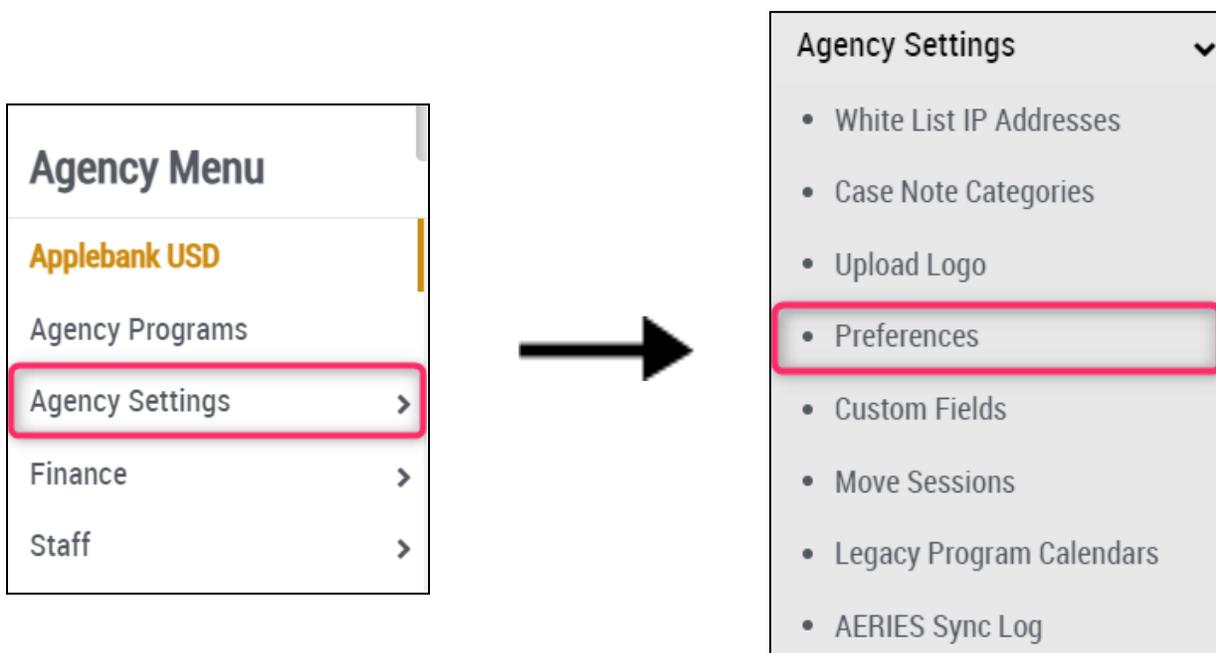
## Table of Contents

*Click on the topic or page number to jump to the corresponding section of the instruction sheet.*

|   |   |
|---|---|
| Enabling Hubbe Application Messaging.....                         | 1 |
| Navigation.....   | 3 |
| Assigning a Case Manager.....                                     | 4 |
| • Assigning a Case Manager on the Waitlist Grid.....              | 4 |
| • Assigning a Case Manager within the Messaging Thread Modal..... | 7 |

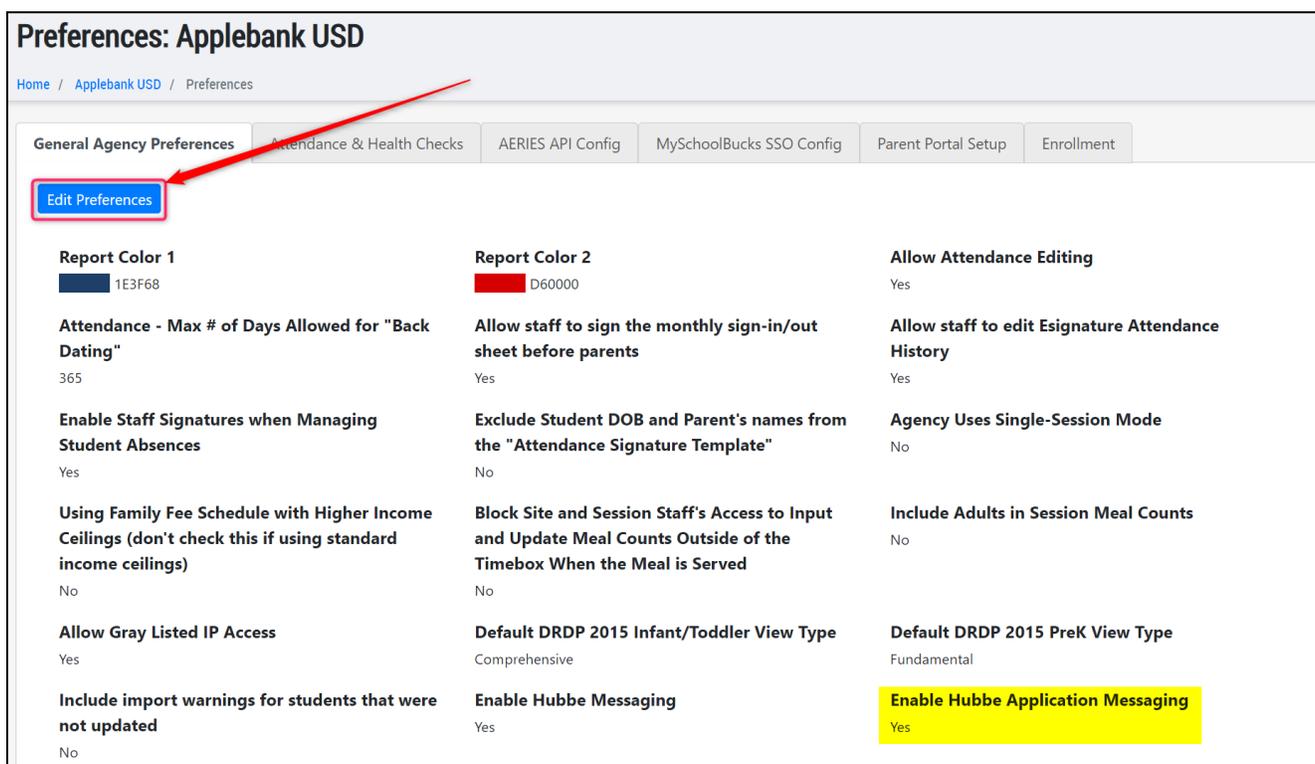
# Enabling Hubbe Application Messaging

The Family Application Messaging Tool must be enabled in your agency's preferences in order to have access to this feature. If you would like to enable this setting, first click on the "Agency Settings" menu item from the **Agency Menu** and then click on "Preferences."



2

In your agency's preferences, look for the "Enable Hubbe Application Messaging" setting. In order to enable this setting (if it hasn't been already), click the blue "Edit Preferences" button.



3

Click the dial button next to “Yes” beneath the “Hubbe Application Messaging Enabled” setting. Then click the blue “Save” button.

### Edit Preferences: Applebank USD

Home / Applebank USD / Edit Preferences: Applebank USD

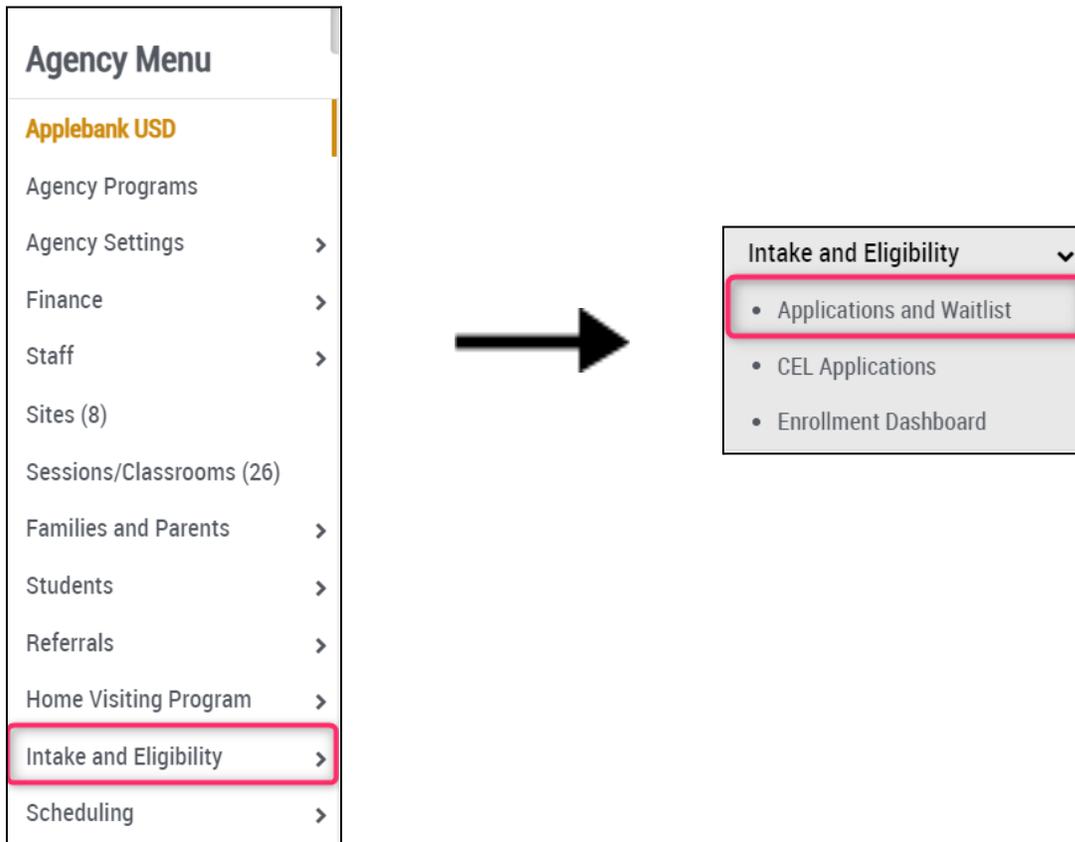
2

|   |   |   |
|---|---|---|
| Report Color 1 (Main color)<br><input type="text" value="1E3F68"/>  | Report Color 2<br><input type="text" value="D60000"/>   | Allow Attendance Editing<br><input checked="" type="radio"/> Yes <input type="radio"/> No   |
| Attendance - Max # of Days Allowed for "Back Dating"<br><input type="text" value="365"/>  | Allow staff to sign the monthly sign-in/out sheet before parents<br><input checked="" type="radio"/> Yes <input type="radio"/> No   | Allow staff to edit Esignature Attendance History<br><input checked="" type="radio"/> Yes <input type="radio"/> No                                      |
| Enable Staff Signatures when Managing Student Absences<br><input checked="" type="radio"/> Yes <input type="radio"/> No   | Exclude Student DOB and Parent's names from the "Attendance Signature Template"<br><input type="radio"/> Yes <input checked="" type="radio"/> No                                      | Agency Uses Single-Session Mode<br><input type="radio"/> Yes <input checked="" type="radio"/> No  |
| Using Family Fee Schedule with Higher Income Ceilings (don't check this if using standard income ceilings)<br><input type="radio"/> Yes <input checked="" type="radio"/> No | Block Site and Session Staff's Access to Input and Update Meal Counts Outside of the Timebox When the Meal is Served<br><input type="radio"/> Yes <input checked="" type="radio"/> No | Include Adults in Session Meal Counts<br><input type="radio"/> Yes <input checked="" type="radio"/> No  |
| Allow gray listed IP access<br><input checked="" type="radio"/> Yes <input type="radio"/> No  | Default DRDP 2015 Infant/Toddler View Type<br><input type="radio"/> Essential <input checked="" type="radio"/> Comprehensive  | Default DRDP 2015 PreK View Type<br><input type="radio"/> Essential <input checked="" type="radio"/> Fundamental<br><input type="radio"/> Comprehensive |
| Include import warnings for students that were not updated<br><input type="radio"/> Yes <input checked="" type="radio"/> No   | Allow select County/State staff access to view student and family records<br><input checked="" type="radio"/> Yes <input type="radio"/> No  | Hubbe Messaging Enabled<br><input checked="" type="radio"/> Yes <input type="radio"/> No  |
| <input checked="" type="radio"/> Yes <input type="radio"/> No<br>Hubbe Application Messaging Enabled  | Default DRDP 2015 School Age View Type<br><input type="radio"/> Simplified <input checked="" type="radio"/> Complete  | Agency offers mental health consultation services<br><input checked="" type="radio"/> Yes <input type="radio"/> No                                      |

1

# Navigating to the Family Application Messaging Tool

On the **Agency Menu**, select “Intake and Eligibility” and then “Applications and Waitlist.”



2

If you have the “Hubbe Application Messaging” setting enabled in your agency’s preferences (see the [previous section](#) for instructions), you will be able to see a “Messages” column in each tab of the Applications and Waitlist grid. For the purpose of this instruction sheet, we will just show the “Messages” column as it appears in the “Waitlist” tab.

The screenshot shows the 'Applications and Waitlist' interface. At the top, there are navigation links and buttons for 'Create Application', 'Download Application Template', 'Configure Application', and 'Condensed View'. Below this is a 'Filters' section and a 'Waitlist' tab. The 'Waitlist' tab is active, and it shows a table of applications. The table has columns for 'Enrolling Students', 'Child Age', 'Program Names', 'Program Year', 'Application Type', 'Email', 'Status', and 'Messages'. The 'Messages' column is highlighted with a red box, and a red arrow points to it from the right. The table contains one entry for Marcos Sanchez, with a 'Submitted' status and a 'Messages' count of (0).

|                          | Enrolling Students  | Child Age | Program Names                | Program Year | Application Type | Email                      | Status        | Messages                     |
|--------------------------|---|-----------|------------------------------|--------------|------------------|----------------------------|---------------|------------------------------|
| <input type="checkbox"/> | <a href="#">View</a> Marcos Sanchez<br>2/7/2019<br>Abigail Aguilar<br>3/19/2015 | 8, 4      | Full Cost School Age Program | 2022-2023    | Re-Application   | natalieaguilar@noemail.com | Submitted (7) | <input type="checkbox"/> (0) |

# Assigning a Case Manager

Assigning case managers prevents multiple staff members from sending the same message or responding twice to parents. There are two ways to assign a case manager, which we will review in the following subsections.

## Assigning a Case Manager on the Waitlist Grid

As an Agency Admin or Intake & Eligibility Coordinator you will be able to view and read these messages but you will not receive notifications or be able to respond unless you are the Case Manager for that particular family application. If there is no Case Manager, you can assign one by clicking the red “[Assign]” text in the “Case Manager” column.

| Messages  | Uploaded Documents  | Case Manager               |
|---|---|----------------------------|
|  (0) | <a href="#">Eligibility Documentation for School Age Families: 2 uploaded</a>  | <a href="#">[Assign]</a> ▼ |
|   | <a href="#">Enrollment Documents</a> ✓  |                            |

2

In the “Assign a Case Manager” modal that pops up, you can type or select the name of the Case Manager from the dropdown menu.

### Assign a Case Manager

Case Managers

  
 Send Email Notification

Cancel Save

3

Next you can choose to send an email notification to the selected case manager by clicking the checkbox next to “Send Email Notification.” If you select this checkbox, the default email will appear. You can make changes to the fields of the email and/or include attachments here if desired. Finally, click the blue “Save” button to proceed.

**Assign a Case Manager**

Case Managers  
 x

**Send Email Notification**

Sender  
 Damion Bruen

Recipients Copy Emails  
 x  
Recipients are emailed individually and do not see each other's addresses

Subject

Body

← → System Font 12pt **B** *I* U A

You've been assigned as a case manager for the following applications:

- [Link to Application](#)
  - Jamie Aguilar ( years old)
  - Marcos Sanchez (4 years old)
  - Marcos Sanchez ( years old)
  - Abigail Aguilar (8 years old)
  - Rank 56 (Family Size of 4, Income of \$5,200.00)
  - No Sibling Enrolled

Please log in to view your new assignments.

Attachments Choose Files

- No attachments selected

4

If you are assigned as a Case Manager, you will be notified of new messages not only on the **Applications and Waitlist** grid but also on the grey toolbar at the top of the page. The latter will follow you throughout the system, so you can access your messages from anywhere in Hubbe. Clicking on the envelope icon in either location will allow you to view your messages.

Home | Data Tools | Search

**Applications and Waitlist**

Home / Applebank USD / Applications and Waitlist

Create Application | Download Application Template | Configure Application | Condensed View

Filters

Waitlist | Submitted Applications | Applications In Process | Completed Applications | Archived Applications

Actions

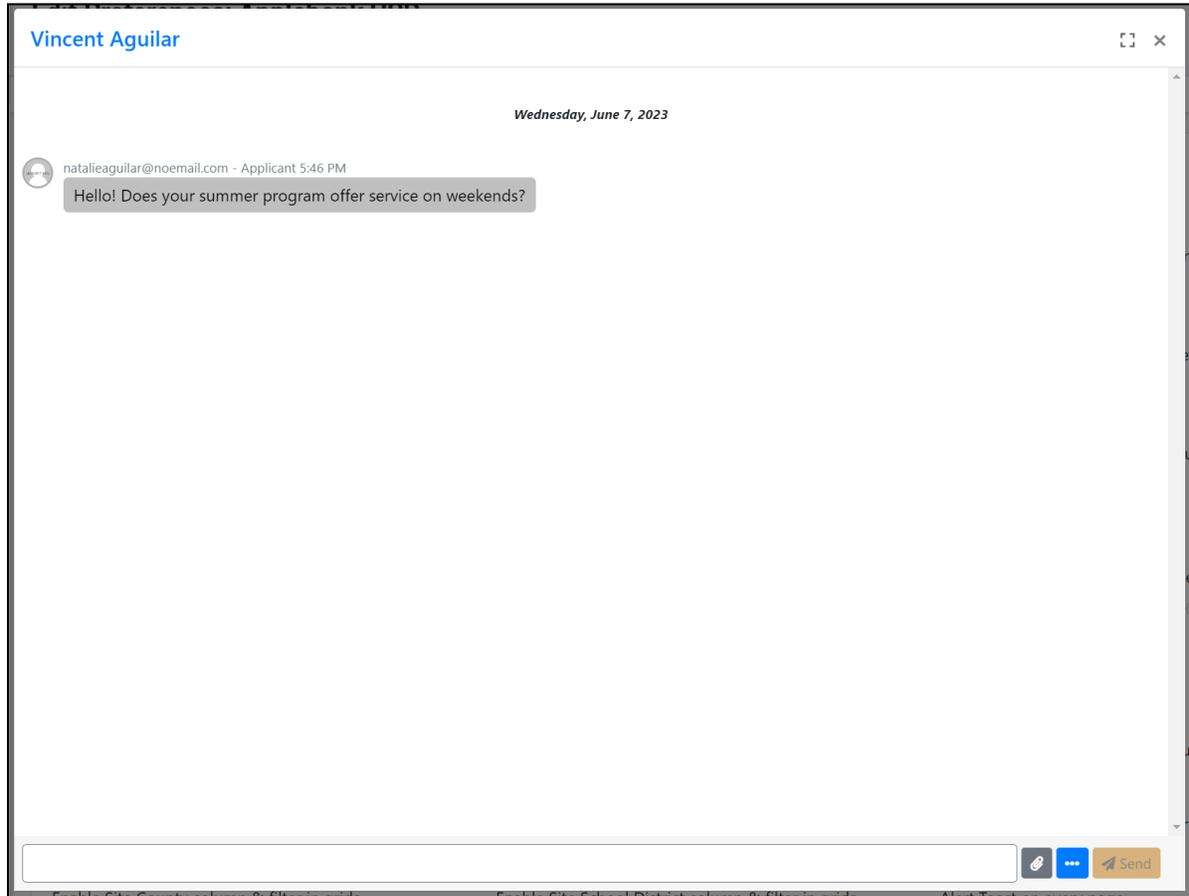
Show Waitlist Metrics

Search:  Show 25 entries Filters Columns Excel Reset Showing 1 to 3 of 3 entries

|                          | Enrolling Students                  | Child Age | Program Names                | Program Year | Application Type | Email                      | Status        | Messages |
|--------------------------|-------------------------------------|-----------|------------------------------|--------------|------------------|----------------------------|---------------|----------|
| <input type="checkbox"/> | <a href="#">View</a> Marcos Sanchez | 8, 4      | Full Cost School Age Program | 2022-2023    | Re-Application   | natalieaguilar@noemail.com | Submitted (7) |          |
|                          | Abigail Aguilar                     |           |                              |              |                  |                            |               |          |

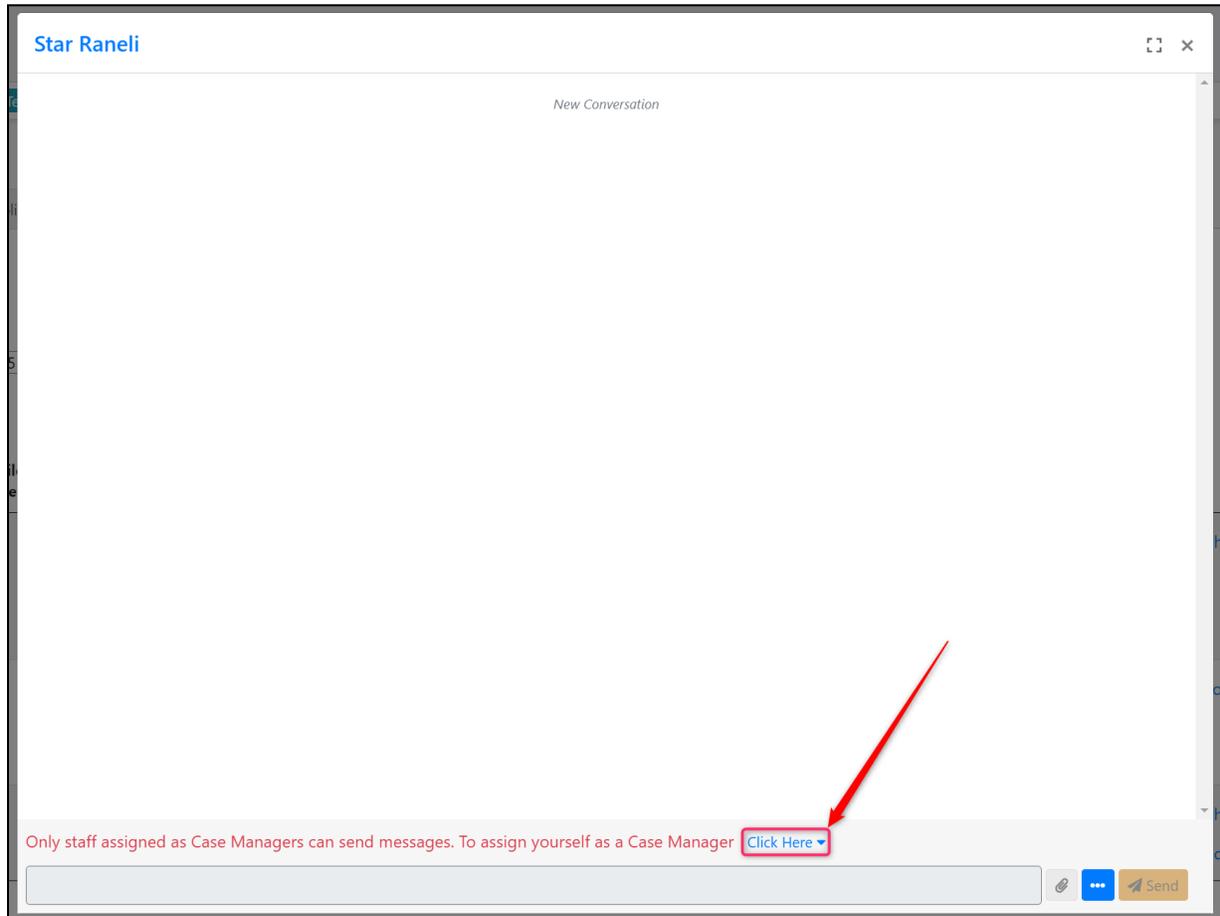
5

Clicking on the envelope icon in the “Messages” column of the **Applications and Waitlist** grid will result in a pop-up modal appearing. Here, staff can view messages between parents and the case manager. If you are the case manager, you can respond to parent messages in this modal.

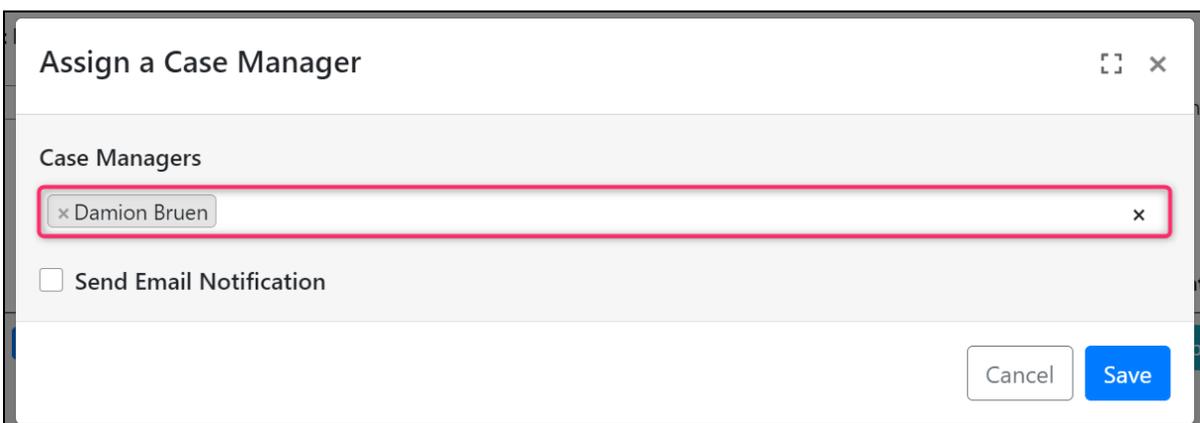


## Assigning a Case Manager Within the Messaging Thread Modal

Instead of assigning a case manager directly on the **Applications and Waitlist** grid, you can also assign one within the messaging thread modal. Once inside the thread, click on the blue “Click Here” text to assign a case manager.



2 This will prompt an “Assign a Case Manager” modal to appear, where you can type in or select a case manager from the dropdown menu.



3

Next you can choose to send an email notification to the selected case manager by clicking the checkbox next to “Send Email Notification.” If you select this checkbox, the default email will appear. You can make changes to the fields of the email and/or include attachments here if desired. Finally, click the blue “Save” button to proceed.

The screenshot shows a dialog box titled "Assign a Case Manager". It contains the following elements:

- Case Managers:** A list with one entry, "Damion Bruen", which is selected.
- Send Email Notification:** A checkbox that is checked and highlighted with a red box.
- Sender:** "Damion Bruen".
- Recipients:** A text field containing "damionbruen@noemail.com" and a "Copy Emails" button.
- Subject:** "New Case Manager Assignment".
- Body:** A rich text editor with a toolbar. The text reads: "You've been assigned as a case manager for the following applications:" followed by a bulleted list:
  - [Link to Application](#)
    - Jamie Aguilar ( years old)
    - Marcos Sanchez (4 years old)
    - Marcos Sanchez ( years old)
    - Abigail Aguilar (8 years old)
    - Rank 56 (Family Size of 4, Income of \$5,200.00)
    - No Sibling Enrolled

Please log in to view your new assignments.
- Attachments:** A "Choose Files" button and a note "No attachments selected".
- Buttons:** "Cancel" and "Save" (highlighted with a red box).

4

After clicking the blue “Save” button, you can respond to messages or start a conversation.

The screenshot shows a "New Conversation" window. At the top, the name "Star Raneli" is displayed. The main area is empty, and at the bottom, there is a text input field and a "Send" button.