



HeadMaster Front Office Tasks

2022



Copyright © 2022, ACS Technologies. All Rights Reserved.

Table of Contents

Customize the Home Screen and the Calendar	3
School Calendar	5
Use Reminders	14
Work with Grids	20
Search for Information	29
Print Reports	33
Use Mailing Labels	43
Generate and Log Correspondence	47
Background Checks	59
Manage Custom Fields	66
Use the Calendar Tab	69
Create Lists	74
Edit an Individual's General Information	76
Immunization Records	79
Customize Program Options and Lists	84
Change Your Password	85
HeadMaster Import	86
Activate or Deactivate a Group of Individuals	87
HeadMaster SchoolCast™ Export	88
Implement New School Year Procedures	89
New School Year Procedures	90

Customize the Home Screen and the Calendar

Customize the Home Screen

The Home screen displays when you open the program. It's divided into three sections:

- **Main Menu** – Displays lists of information about individuals and groups in the program including classes, teachers, families, students, and other individual types.
- **Assistants** – Displays a list of tasks you can perform in the program including Adding Students, Posting Grades, and Updating Permanent Records.
- **Other** – Displays program options and other information about an individual or group.

You can customize the Home screen display on the Customize tab, located at the bottom of the screen.

To customize the Home screen display, click the **Customize** tab. Make your selections in the Home Tab section, and click **OK**.

Customize the Calendar

You can customize the Calendar display on the Customize tab, located at the bottom of the screen.

To customize the Calendar tab

1. On the Home screen, click the **Customize** tab.
2. Make your display selections in the Display Options section.
3. Calendar events are indicated by a small graphic image called an event icon. To select an event icon to display on your calendar, on the Home screen, click the **Customize** tab.
4. Click the **Calendar Event Icon** drop-down list and select an image.

Useful Information: Only those with teacher logins will see the Show Assignments and Show Lesson Plans check boxes.

School Calendar

Set Up Custom Events and Closing Lists

You can create a custom list of events and closings (such as holidays) to insert into the school calendar. Once created, the list is available as an Event list when you insert an event or holiday in the calendar. Setting up custom lists is optional because you can add events and closings directly from the school calendar. However, if you take time to pre-define these lists, it may save you time later.

To create a list or event

1. On the Home screen, click **Define List**.
2. Under Calendar, click **Day Types**.
3. Click **Add**.
4. Enter a description of the closing or event. For example, enter Christmas or Science Fair.
5. In the Type list, select **Closed**, if the school will be closed. Or, select **Events** for an important occurrence.
6. Click **OK**.
7. Repeat steps 3 through 6 for each closing event you want to add.
8. On the Home screen, click **Define Lists**.

To change an event description or type

1. On the Home screen, click **Define Lists**.
2. Under Calendar, click **Day Types**.
3. Double-click the description you want to change.
4. Change the description or select a new **Type**.
5. Click **OK**.

To remove a description

1. On the Home screen, click **Define Lists**.
2. Under Calendar, click **Day Types**.
3. Click to select the description you want to remove.
4. Click **Delete**.
5. When the confirmation message displays, click **Yes**.

Useful Information: After you set up custom closing and event lists, you can print a list for reference. Click **Print**, then click the **Print** icon in the preview window.

Create a School Calendar

The School Calendar contains half and full day closings and events, such as the science fair, athletic events, or special presentations. You can print the calendar for distribution to students and parents. Additionally, teachers and staff can view the calendar when they log in to HeadMaster.

The School Calendar is created using the start and end dates of your grading periods. Before you begin adding events or closings to the calendar, check to see that your grading periods are set up properly. For more information, see *Set Dates for Grading Periods* on page 90.

By default, the calendar creates a standard school week (Monday through Friday), where students meet for the same classes each day. However, you can reset the school calendar so that it displays a custom start and end date, days of the week that you specify, or one that displays block scheduling: Alternate Days (A/B Days) or Alternate Weeks (A/B Weeks). If you're setting up your calendar for the first time and know you want to use either A/B Days or A/B Weeks, select one of these types first. This will prevent you from having to reset the schedule.

To create a school calendar

1. On the Tools menu, click **School Calendar**. The default standard calendar displays.
2. Add closing and events. See *Add Closings, Events, and Half Days* on page 9.
3. In the Type list, select **A/B Day** or **A/B Week**. See *More about Block Scheduling* on the next page.
4. To save, click **OK**.

More about Block Scheduling

Block scheduling is a type of academic scheduling in which each student has fewer classes per day for a longer period of time. The A/B or alternate day plan organizes each day into four 90-minute periods but has a total of eight classes meeting over two consecutive days (“A Day” and “B Day”). Another way of distributing classes is to alternate ABABA weeks with BABAB weeks. See examples below.

Example of Block Scheduling - A Week

Time	Mon (A)	Tue (B)	Wed (A)	Thu (B)	Fri (A)
09:00 - 10:45	English II	Geometry	English II	Geometry	English II
10:50 - 12:35	World History	P.E./Health	World History	P.E./Health	World History
12:40 - 1:00	Lunch	Lunch	Lunch	Lunch	Lunch
01:05 - 02:45	Art II	Biology	Art II	Biology	Art II

Example of Block Scheduling - B Week

Time	Mon (A)	Tue (B)	Wed (A)	Thu (B)	Fri (A)
09:00 - 10:45	Geometry	English II	Geometry	English II	Geometry
10:50 - 12:35	P.E./Health	World History	P.E./Health	World History	P.E./Health
12:40 - 1:00	Lunch	Lunch	Lunch	Lunch	Lunch
01:05 - 02:45	Biology	Art II	Biology	Art II	Biology

Example of Block Scheduling - Mixed

Time	Mon (A)	Tue (B)	Wed (A)	Thu (B)	Fri (Mixed)
09:00 - 09:50	English II	Geometry	English II	Geometry	English II
09:55 - 10:45					Geometry
10:50 - 11:40	World History	P.E./Health	World History	P.E./Health	World History
11:45 - 12:35					P.E./Health
12:40 - 1:00	Lunch	Lunch	Lunch	Lunch	Lunch
01:05 - 01:55	Art II	Biology	Art II	Biology	Art II
02:00 - 02:45					Biology

Reset Calendar Options

Resetting the options erases all data in the current calendar.

Resetting the calendar options is generally used at the start of a new school year. You can also reset the options when you want to change the start and end dates of the calendar, change the specific days of the week that display, or switching from a standard calendar to a block scheduled calendar (A/B Days or A/B Weeks).

To reset calendar options

1. On the Tools menu, click **School Calendar**. The default standard calendar displays.
2. With the School Calendar open, click **Reset**.
3. Select the **Start Date** and/or **End Date**.
4. Select the **Type**.
5. Select the days your school is regularly open. Note that all days of the week display in the calendar.
6. Click **OK**. HeadMaster builds the new calendar based on the options selected.

Add Closings, Events, and Half Days

After you create a calendar, you can add school closings (half and whole day) and events. You can add these one day at a time or you can add a closing or event to an entire week.

1. On the Tools menu, click **School Calendar**.
2. Right-click a date on the calendar and make your selection.
3. In the Closed or Events menu, select the type of closing (such as Christmas) or the event (such as Science Fair) to add to the calendar.
4. Repeat steps 2 through 3 for each closing or event you want to add.
5. Click **OK**.
6. On the Tools menu, click **School Calendar**.
7. Right-click a date on the calendar and make your selection.
8. Click **Half Day**.
9. To reset the day to a standard day, right-click the date and select **Standard Day**.

Useful Information: You can also mark the calendar using the tool bar. Click the date on the calendar you want to set. On the toolbar, click **Standard Day**, **Half Day**, **Add by Day**, or **Add by Week**.

Remove Events from the School Calendar

You can remove a closing or event from the calendar.

1. On the Tools menu, click **School Calendar**.
2. Right-click a date and click **Remove Item**.

Useful Information: If you marked an entire week, you must remove each day individually.

Print the School Calendar

There are two ways to print the school calendar. You can print a Calendar View report and a Detail View report. A preview of each report displays prior to printing.

1. On the Tools menu, click **School Calendar**.
2. On the toolbar, click **Print** and select a view.
3. To print the report, click the Printer icon and click **OK**.

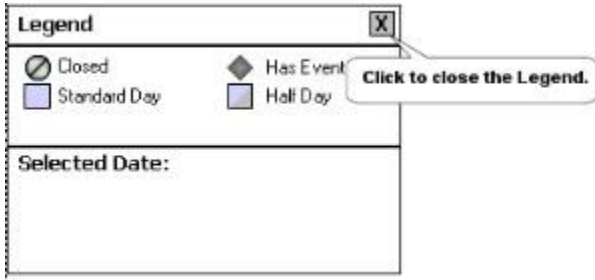
Viewing the School Calendar (Teachers and Staff)

Teachers and staff can only view and print the school calendar. To view the school calendar, on the Tools menu, click School Calendar.

For information about printing the calendar, see [Print the School Calendar](#) on page 11. For assistance with the calendar legend, see [Close and Open the Calendar Legend](#) on the next page.

Close and Open the Calendar Legend

By default, the legend displays on the school calendar page. To close the legend, click the X. To re-open the Legend, on the toolbar, click Show Legend.



Use Reminders

Add Reminders

Reminders are the "sticky notes" in HeadMaster. After you set up reminders, they display on the HeadMaster Calendar tab. While Reminders can be added on the Calendar tab, you can also view, add, edit, filter, and print reminders from the Reminder List.

Reminders can be used to notify the following:

- Individual parent meetings
- Teacher meetings
- Parent-teacher conferences
- Administration meetings
- Medical appointments
- Holidays
- Personal reminders
- Athletic events
- Student birthdays

To add reminders

1. On the Home screen, click **Reminders**.
2. Click **New**.
3. Enter the name, expiration date, and notes, if any.
4. Click **OK**.

Delete a Reminder

You can delete a reminder from HeadMaster if it is no longer applicable or has been completed. You can only remove reminders from the Reminder List.

1. On Home screen, click **Reminders**.
2. Click to select the reminder you want to delete.
3. Click **Delete**.
4. Click **Yes**.

Edit a Reminder or Mark a Reminder as Completed

You can edit reminders, and you can mark them as completed.

1. On Home screen, click **Reminders**.
2. Double-click the reminder you want to change.
3. Make the changes and click **OK**.

Make Reminders Public

The ability to make a reminder public is a useful feature for school administrators. When a reminder is made public, it displays on the Calendar tab under Reminders. You can use this to remind teachers that grades are due by a specific date or of meetings, school functions, or other deadlines.

1. On the Home screen, click **Reminders**.
2. To add a new reminder, click **New**. To edit an existing reminder, click **Edit**.
3. Enter a publish date and an expiration date.
4. Select the **Make Public** check box and click **OK**.

Print a List of Reminders

You can preview or print a list of reminders from the Reminder List.

1. On Home screen, click **Reminders**.
2. To preview, on the shortcut bar, click **Preview**.
3. To print, on the shortcut bar, click **Print**.

Viewing Reminders

There are two ways to view reminders:

- On the Home screen, click Reminders. All reminders appear in the Reminder List.
- On the Home screen, click the Calendar tab. Reminders are grouped in the Reminder box, and an icon displays on the calendar to indicate a reminder exists for that date.

Work with Grids

Customize Grids

You can access most of the information stored in HeadMaster via information grids, also called List Views. Information grids have two primary purposes:

- They enable you to find and select specific records.
- They allow you to view commonly used information without loading individual records.

Grids can be customized to display the fields or columns that you want to see. For example, by default, the Assignments grid displays the following default columns: Name, Class Section, Period, Date Assigned, and Date Due. However, Mrs. Smith would like to also view the assignment type, such as “homework” or “test” as well as the description of the assignment. She can add these columns to her grid and save the custom view.

1. With your cursor in the grid, right-click your mouse.
2. On the right-click menu, click **Customize**. The Customize Grid menu displays the available column names.
3. Select the field names you want to add to the grid and click **OK**.
4. On the toolbar, click **Save Current View**.
5. In the Save View dialog box, enter the name of your view. For example, enter "My View."
6. Click **OK**.

Useful Information:

- You can click and drag the field name to the place on the grid where you want it displayed.
- To resize the column, place the cursor on the line between two fields. Click and drag the border to the desired width. To automatically adjust the width to fit the data in the column, place the cursor on the line between two fields and double-click the mouse.

You can also customize the grid colors.

1. On the Home screen, click **Options**.
2. In the options list, click **Custom Colors**.
3. Select a pre-made color scheme from the drop-down list or select your own colors from the sample grid.
4. Click **Close**.

Filter by Form

When you need to filter a list using three or more fields, use the Filter by Form option.

1. On the toolbar, click **Filter by Form**. The Filter by Form dialog box displays.
2. Select the items you want to filter for.
3. Click **OK**. The grid displays the record type you selected.
4. To print the filtered view, on the toolbar, click **Print**.
5. To clear the filter, on the toolbar, click **Clear Filter**.

Filter by Selection

To obtain a quick view of the records you want to see based on one or two fields, use the Filter by Selection option.

To highlight the selection or type of records you want to view, click a cell that contains the record selection.

1. On the toolbar, click **Filter by Selection**. The grid displays the record types you selected.
2. To filter the grid again, repeat steps 1 and 2 as many times as necessary.
3. To print the filtered view, on the toolbar, click **Print**.
4. To clear the filter, click **Clear Filter**.

Filter Grids

If you want to minimize the types or number of records you can see in the grid, you can filter the records so that you can find just what you are looking for.

There are two ways to filter grids:

- Filter by selection
- Filter by form

If you want to filter only one or two fields, use the Filter by Selection to obtain a quick view of the records you want to see. However, if you need to filter three or more fields, use the Filter by Form method to eliminate redundant keystrokes.

To print the filtered view, on the toolbar, click **Print**.

Open Saved Views

After you save one or more views, you can switch between various grid views.

1. On the toolbar, click **Open Saved View**.
2. Select the view name you want to see and click **OK**.

Save a View

You can save a view you use often so it can be opened again at a later time.

1. On the toolbar, select **Save Current View**. The Save View dialog box displays.
2. In the dialog box, enter the name of your view. For example, enter "My View."
3. Click **OK**.

Sort Grids

Information can be sorted by any field in the grid in ascending or descending order.

1. Click the column heading.
2. To reverse the sort order, click the column heading again.

Search in a Grid

You can search within a grid for specific information.

1. Click the column heading name.
2. Enter letters or numbers in the Search for text box located above the grid.

Save a Grid as a File

As an administrator, you can export data from HeadMaster and save it in a file. You can also save an information grid as a webpage (.htm, .html), text comma delimited (.txt), or comma delimited (.csv) file.

Useful Information: You can export specific records in the order you want by filtering for specific criteria, and then sorting in the desired order prior to exporting the data. The data is exported using the current sort order and filter criteria.

To save a grid

1. On the Home screen, click the type of information grid you want to export (Students, Parents, Teachers, etc.)
2. Customize the list view and filter or sort the criteria as needed.
3. On the shortcut bar, click **Save to File**.
4. In the **Save in** list, select a location to save the file.
5. Enter a name in the **File name field**.
6. In the **Save as type** list, select a **file type**. Example: .htm, .html, .txt, or .csv.
7. Click **Save**.

Search for Information

Build a Search Query

A query is a question or inquiry. When you create a search, you have a question in mind. To answer the question, you need to know what information to enter into a search before you can get the correct information out of a search. Decide what information you are looking for and break it into manageable pieces or fields.

For example, you need a list of all female students with a GPA greater than 3.5 so that you can recognize them at this year's graduation. Start the search by breaking the information down. You need to perform a search that isolates the following characteristics:

- The individuals must be students.
- The students must be females.
- The students must be graduating May of the current school year.
- The students must have a GPA greater than 3.5.

Now that you have broken this down into distinct items, you can create this query.

Conditions further define a field in a search. Conditions contain three parts:

- **Field** – Search for any field in HeadMaster. Examples of fields are First Name, Current GPA, Locker Number, or Immunization Date Due.
- **Operator** – Use mathematical expressions such as greater than, less than, equal to, not equal to, ends with, starts with, and contains.
- **Value** – Enter a specific representation for the field. For example, if the field is Grade Level, a value is K5.

To build a search query

1. On the Home screen, click **Searches**.
2. Click **New**.
3. On the General tab, in the Name field, enter **Female Honor Graduates**.
4. Click the **Type** list and select **Student**.
5. Click the **Criteria** tab. On the toolbar, click the **Toggle And Or** until the Query condition is **And**.
6. Under Fields, expand **Individual** and double-click **Gender**.
7. Click the **Operator list** and select **Is Equal To**.
8. Click the **Value list** and select **Female**. Click **OK**.
9. Repeat steps 6, 7, and 8 for each of the remaining parts of the query.
10. For Field, select **Active Student**; For Operator, select **Is Equal To**; and for Value, select **Female**.
11. For Field, select **Current GPA**; For Operator, select **Is Greater Than**; and for Value, enter **3.5**.
12. For Field, select **Graduation Date**; For Operator, select **Is Equal To**; and for Value, enter **5/31/2013**.
13. On the toolbar, click **Process Search**.

Useful Information: You must have at least one field (or criterion) selected to perform a search. These fields are strung together using AND / OR statements. Each Operators and Values are limitations upon the field. Possible Operators are: Is Greater Than, Is Equal To, Is Not Equal To, Starts With, Ends With, and Contains. Values can be anything that a specific field can be worth. By adding conditions (fields with operators and values), you can structure a search to find exactly what you are looking for.

Create and Save a Search

When you create and save searches, you're building a search list that contains queries that you can use over and over. From the Search window, you can view, add, change, delete, and print the results of searches or queries on your data.

1. On the Home screen, click **Searches**.
2. Click **New**.
3. On the General tab, enter a descriptive name that relates to the results of the search. The search criteria will be saved by the name you enter here.
4. To select a type from the search list, click the **Type** list.
5. To help identify a saved search later, enter a **Description**.
6. Click the **Criteria** tab.
7. On the toolbar, click the condition **And** or **Or**. To create a search that requires two or more criteria, click **And**. To create a choice between two criteria in the search, click **Or**. When using Or, you can search for one criterion or another, but not both.
8. To enter conditions, double-click a field. In the Fields list, select a mathematical expression that compares the field with the value and enter or select a value.
9. To add other conditions, repeat step 6. If you need to remove conditions, in the toolbar, click **Clear Criteria**.
10. To view the results of the query, click **Process Search** on the toolbar.

Useful Information:

- If you search **Parent** type, you can also include Secondary Parents (for students with blended families) in your search results.
- When building queries, you may need to change the condition set in step 7 above. To change an **And** to **Or**, or an **Or** to **And**, select the condition. On the toolbar, click **Toggle And Or**.

Create and Save Commonly Used Searches

Searches provide all the tools you need to filter your data and find specific information for use in reports, communications, and extracts. You can combine multiple sets of criteria for complex searches.

You can perform a search to locate and return records of students, teachers, parents, classes, other people, alumni and staff members with something specific in common. When you search in HeadMaster, you enter criteria that narrows the search to the information you are looking for. Once you select the criteria, you can view the results instantly. Searches automate the process of looking at each record to find those that match your criteria. The search results that are returned can be used to print reports. You can also export search results for use in other programs.

The following are examples of situations when searches can be used to find the information needed:

- A local camp is planning a retreat for girls in middle school to take place over the summer. You want to make sure all of your middle school girls receive a mailer about the camp. This search is performed with student data.
- You are planning a Spring Festival for the school and you need parents to help run it. You need to print a listing of all parents who have volunteered to help at school functions. This search is performed with parent data.
- You need a list of all teachers who have a master's degree or Ph.D. to send to your governing body for accreditation. This search is performed with teacher data.
- A prospective student is inquiring about college prep classes your school offers to students entering high school as freshmen. This search is performed with classes data.
- You need a list of active staff members who are also parents. This search is performed with staff data.
- The Junior League is sponsoring a luncheon for women who serve as board members of non-profit schools and organizations in the area. You want to make sure the female board members at your school receive information on the luncheon. This search is performed with other people data.
- Your school promised a tuition discount for all new students who pre-enrolled in May 2013. You need a list of these individuals so you can apply the discount to their tuition. This search is performed with pre-enrolled data.
- A group of investors wants to build a drug rehabilitation facility two blocks from your school. There is going to be a town meeting in two weeks to discuss the issue, but only individuals who live in the 29505 ZIP code area may attend the meeting. You want to make sure that the families in that area are informed of the situation and the upcoming meeting. This search uses family data.

Locate People

To locate individuals, such as students, parents, teachers, prospective, or other, on the Home screen, click Locate.

1. On the Locate toolbar, click **View Type**, and select the type of individual you want to locate.
2. In the Locate field, enter the first few letters of the person you want to find. Headmaster highlights the name.
3. To view or edit the individual's record, double-click the individual's name.
4. To delete the individual from the data, click **Delete** on the toolbar.
5. To add an individual, click **New**.

Useful Information: If the Home screen is not displayed, in the Shortcuts menu, click **Locate**. The Shortcuts menu is located by default to the left of the window.

Print Reports

Set Up and Print a Report

You can print reports that contain important information about your school and students. A wide variety of options are available for each type of report. Additionally, administrators can set security options for individual reports, thereby limiting the information that other users can view. On the Home screen, or on the Main Menu, click **Reports**.

You can also copy a report and customize it to display the information that you want on it. Once you copy a report, you can make it private or public. A private report can only be viewed by the individual who made it private.

After you select a report, you have the option of using search, sort, filter and miscellaneous options to customize or limit the data that is sent to the report. Report options differ depending on the type of report you select.

If necessary, you can customize the printer and page settings for a particular document. Make the changes you want, and the default settings will return automatically once the document is closed.

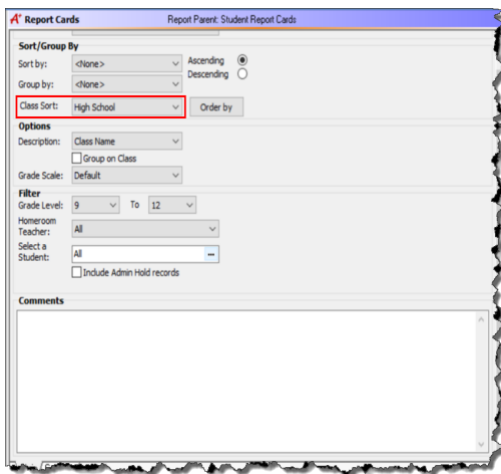
1. Under Report List, select a report.
2. Set the search and filter options you want.
3. Click **Print**.

Save Order by Selections in Grades Reports

You may need to customize reports to meet the needs of your organization. For example, creating a list of entries (each with a saved order of classes) can help you run your Student Report Cards more quickly.

To save the class sort order

1. On the Home screen, or on the Main Menu, click **Reports**.
2. In the Report List, select **Grades**.
3. Under Grades, select one of the following reports: *Student Report Cards*, *Progress Report*, *Skill Grades - 2 Column*, or *Skills Report*.
4. Click **Order by**, and then click **New**.
5. Enter a description, such as *High School*.
6. Under Sort Type, select **Class**.
7. Add classes to the right-side column in the order you want them to display in the report.
8. Click **Save**.
9. Your selections are saved as an entry in the Class Sort list that you can use later.



The screenshot shows a software interface for configuring report cards. The window title is 'Report Cards' and the parent report is 'Student Report Cards'. Under the 'Sort/Group By' section, 'Sort by' is set to '<none>' and 'Group by' is also '<none>'. The 'Class Sort' dropdown menu is highlighted with a red box and set to 'High School'. Below this, there are sections for 'Options' (Description: Class Name, Group on Class checkbox, Grade Scale: Default), 'Filter' (Grade Level: 9 to 12, Homeroom, Teachers: All, Student: All, Include Admin Hold records checkbox), and a 'Comments' text area.

Note: If you make a copy of the report, your class sort order will be saved in the report copy.

Adjust Report Margins

If you have problems with information being cut off of your reports, you can adjust your printer margins.

1. On the report toolbar, click **Setup**.
2. Adjust margins and click **OK**.

Set Up School Contact and Term Information to Print on Reports

An administrator should enter the term and school's contact information in Options so that it will properly display on reports and correspondence. See also Add Your School Logo to Reports and Report Cards on the next page.

Useful Information: Canadian clients –To display the Canadian format to social security numbers, you must type either Canada or CA in the country field.

1. On the Home screen, click Options.
2. Click School Info.
3. Under Term, enter a Description, such as "School Year (2017-2018)."
4. Under contact, enter the contact information.
5. Enter the address.
6. Click Close.

Add Your School Logo to Reports and Report Cards

If you add your school's logo to the HeadMaster database, you can print the logo on report cards and other official documents or reports. You must have an image file located on your computer or a removable storage device. Once added, the logo automatically appears on report cards.

1. On the Home screen, click **Options**.
2. Click **School Info**.
3. Under School Logo, click **Add**.
4. In the Browse window, locate the file that contains the school logo image.
5. Select the image and click **Open**. The image will display under School Logo.
6. Click **Close**.
7. On the Home screen, click **Options**.
8. Click **School Info**.
9. Under School Logo, click **Remove**.
10. Click **Close**.

Export the Report to a File Format

Using **Print to File**, you can export a report to a destination on your hard drive. The report can be posted as a web page, imported in another software program, emailed, or saved as an image file. The following file formats are supported by HeadMaster:

- **BMP** stands for Bit-Mapped graphics format and is the standard for graphics files. You can save a report as a BMP, which is an image, in order to insert the report into a Microsoft® Word® document. For example, save a report card as a BMP and insert it into a document to show an example of what your report cards look like.
- **HTML** stands for Hyper Text Markup Language, the authoring language used to create documents on the World Wide Web. You could save a report card as a HTML file and post it on you school's web page to show students and parents what their report cards will look like and perhaps explain the format.
- **PDF** stands for Portable Document Format, which makes it possible to send formatted documents and have them appear on the recipient's monitor or printer as they were originally formatted. To view a report saved in PDF format, you need Adobe® Acrobat Reader® which ships on the Headmaster CD-ROM.
- **RTF** stands for Rich Text Format and is an interchange format for exchange of documents between Microsoft Word and other systems. For example, save the Family List report as an RTF so that you can make changes or manipulate the text on the report in Microsoft Word or Notepad before distributing the report to office employees.

To export the report

1. On the Report toolbar, click **Print to File**.
2. To set the location to save the file, click **Browse**. Navigate to the folder where you want to save it and click **Save**.
3. Click the File Type list and make your selection.
4. To view the file prior to export, click **Preview**. Otherwise, click **Export**. The file will be saved to the location you specified.

Copy Reports

Occasionally, you may need to create or customize a report so that it meets the needs of your organization. You can copy a report, edit it using Report Builder, and save it for later use.

1. On the Home screen, or on the Main Menu, click **Reports**.
2. Select a report and click **Copy**.
3. Enter a name for the report and click **OK**. To edit the report, double-click the report name to open it in Report Builder.

Edit the Statement Report to Print on Pre-Printed Statement of Account Forms

You can edit the Statement report with Report Builder so the statement will print on the ACS pre-printed Statement of Account form.






1. On the Home screen, or on the Main Shortcuts menu, click the **Reports** icon.
2. Under **Billing**, click **Statement**.
3. On the toolbar, click **Copy**. This makes a copy of the report that you can edit.
4. In the Copy Report dialog box, enter a new name for the report, and click **OK**.
5. To open the report, double-click the report you want to open.
6. In the report, under Group Header[1]: FamilyID, press and hold the **Shift** key and click each of the following six fields to select them:
 - Due Date
 - Description
 - Check No.
 - Date Paid
 - Amount
 - Balance
7. Press the **Delete** button on your keyboard.
8. On the File menu, click **Save**.
9. On the File menu, click **Close**. This returns you to the HeadMaster Reports window.

Understand Report Builder Basics

Before you can make any changes to the default reports, you must first make a copy of them. Click to highlight a report and click the **Copy** button on the toolbar. Give the report a name (this will print as the title). With your copied report highlighted, click the **Edit** button on the toolbar to open the Report Builder program.


The basic steps listed below will be applicable to all reports. Please keep in mind the fields that are available to add to a report will be dependent upon the type of report you are editing (student, parent, family, class, etc.).

To delete fields, while in Edit mode, click the field you don't want, and press **Delete** on your keyboard. If the report you're editing has multiple tabs, it's possible that unwanted fields will be located on them. You'll need to check each tab to ensure that everything is removed.

1. On the toolbar, click the  **Label** button.
2. Click the area in which you want the field to print.
3. In the field above the ruler, enter your data.
4. On the toolbar, click the  **RichText** button.
5. Click the area in which you want the field to print.
6. On the toolbar, right-click the  **RichText** button and select **Edit**.
7. Enter your data.
8. On the main menu, click **File > Close**.
9. Click on the box you want to resize.
10. Place the mouse over one of the small circles, hold the left mouse button down, and move it left/right or up/down.
11. Click on the box that needs to be moved to another location.
12. Hold the left mouse button down, and move the box left/right or up/down.
13. Click on the first box you want to move.
14. Press **Shift** on the keyboard and click all other boxes that you want to move.
15. Hold the left mouse button down, and move the box left/right or up/down.
16. Click on the box you want to change.
17. Use  to adjust how the text will print.
18. On the toolbar, click the  **DBText** button.
19. Click the area you want the field to print.
20. Select the data field you want from the drop-down list.

Useful Information: The field options you see vary depending on the type of report you are editing.

An added step must be performed if you want to add information to a report that is outside the original data design. For example, you can add parent names to a student report (such as Student Address List). The following procedure is provided as an example:

1. On the toolbar, click the  **SubReport** button.
2. Click the area where you want the field to print.
3. Right-click and select **Parent Width**.
4. Resize the box as needed.
5. Click the empty drop-down list above the ruler and select **Family**.
6. Repeat steps 1 through 6 but select **Parents**. Place the Parents sub-report directly on top of the Family sub-report.
7. Click the **SubReport Family** tab and remove all three empty spaces by dragging the gray divider lines up to the top. Place your mouse above the word **Summary** and drag it up to **Detail**. Place your mouse above the word **Detail** and drag it up to **Title**.
8. Click the **SubReport Parents** tab, and in the Detail pane add your database fields.

Useful Information: When creating title headings, follow the steps to add a title or single line of text and place the title in the title field. For any areas not in use, follow the instructions in step 7 to remove blank spaces.

Use Mailing Labels

Print Mailing Labels

HeadMaster supports several commonly used Avery® labels for printing addresses, name badges, and name tags. The following labels are available:

Report	Description
Address (Avery 5160)	Prints a sheet of address labels using Avery 5160 labels.
Address (Avery 5161)	Prints a sheet of address labels using Avery 5161 labels.
Address (Avery 5260)	Prints a sheet of address labels using Avery 5260 labels.
Address/Shipping (Avery 5163)	Prints a sheet of address labels using Avery 5163 labels.
Address/Shipping (Avery 5164)	Prints a sheet of address shipping labels using Avery 5164 labels.
Name Badge (Avery 5395)	Prints a sheet of name badges using Avery 5395 labels.
Name Tag (Avery 5385)	Prints a sheet of name tags using Avery 5385 labels.
Rolodex (Avery 5386)	3" x 5" rotary cards.
Rolodex (Avery 5388)	Prints 3" x 5" index cards.

There are two parts to printing labels:

- Setting up the label data
- Setting up the label layout

When setting up the label data, you can select to print labels for a group of individuals, such as all students, or all parents, or you can use a previously saved search or create a new search to use to print labels based on specific criteria.

Setting the label layout means to select from a list the fields you want to print on the label, such as a student's address, date of birth, medications, or other information. Also, prior to printing, it is helpful to preview the labels to make certain that they look the way you want them to.

To print mailing labels

1. On the Home screen, or on the Main Menu, click **Reports**.
2. On the Reports List, double-click **Labels**.
3. Select the Avery label stock you want to print.
4. Under Label Data, click the **Label Type** list and select the name of the group for which you want to print labels.
5. If you want to sort the labels, for example to have them print in alphabetical name order, click the **Sort by list** and select a field to sort by.
6. The Search Type list displays saved searches for the group you selected in **Label Type**. Click the Search Type list and select a saved **Search Type**.
7. To select a saved search, click the **Search** list and select a search name. If you don't have a saved search, click **New Search**. For help creating searches, see Create and Save Commonly Used Searches on page 31.
8. Under Label Layout, click each **Line** and select the fields you want to print on the label. To print the field name, select **Show Title**. To print custom text, select **Text** and enter the text you want to print on the label.
9. Also, under Label Layout, you can select **Show all Families** to print all families. If the Show all Families check box is clear, only primary families will print.
10. Click **Print**.

Set up label layout

1. In the report list, double-click **Labels** and select a label style.
2. Click the **Label Type** list and select **Student**.
3. Click **Sort by** and select a field of your choice.
4. Click **Search Type** and select **Student**.
5. Click **New Search**.
6. On the General tab, in the Name field, enter **Active Students**. Click the **Type** list and select **Student**.
7. Click the **Criteria** tab.
8. Under Fields, expand **Student** and double-click **Active Student**.
9. In the Condition dialog box, click the **Operator** list and select **Is Equal To**. Click the **Value** list and select **Yes**.
10. Click **OK**.
11. On the toolbar, click **Process Search**.
12. Click **Close**.
13. To close the Search window, click **OK**.
14. On the Labels View window, click the **Search** list and select **Active Students**.
15. Select the **Label Layout** you want and click **Preview**.

Set up label data

1. In the report list, double-click **Labels** and select a label style.
2. Click the **Label Type** list and select **Student**.
3. Click **Sort by** and select a field of your choice.
4. Click **Search Type** and select **Class**.
5. Click **New Search**.
6. On the General tab, in the Name field, enter **First Grade**. Click the **Type** list and select **Student**.
7. Click the **Criteria** tab.
8. Under Fields, expand **Student** and double-click **Grade Level**.
9. In the Condition dialog box, click the **Operator** list and select **Is Equal To**. Click the **Value** list and select **01**.
10. Click **OK**.
11. Click **Process Search**.
12. Click **Close**.
13. To close the Search window, click **OK**.
14. On the Labels View window, click the **Search** list and select **First Grade**.
15. Select the Label Layout you want and click **Preview**.

Generate and Log Correspondence

Set Up SMTP Settings

In order to send email or mass email through correspondence, you must enter the default SMTP server settings in HeadMaster. Before you begin, obtain the server and port settings from your Internet carrier or system administrator. You will also need your username and password.

1. On the Home screen, click **Options**.
2. Click **SMTP Settings**.
3. Enter the server name and port name.
4. To force the user to log on to the outgoing email server, select the **Authenticate** check box. If you select this option, the user will be prompted to log on when he connects to the specified server.
5. Select the **Use SSL** check box to encrypt the email.
6. Enter your username and password.
7. Enter the school email address. This will function as the default email address for replies unless a reply email is set up under Settings.
8. Enter a standard signature in the text box.

Set Up Mass Email Settings

To use the mass email feature in HeadMaster, you must set up email account information and your system administrator must set up SMTP information. The information entered under settings is the personal email settings for each teacher, administrator, or staff member in the school. The SMTP settings are school-wide and should be the same for everyone.

The email settings under User Settings override the email settings under SMTP settings. For example, if a teacher prefers email responses to be delivered to her personal mailbox instead of the school's general mailbox, the teacher should enter an email address for replies under Settings. The replies will be sent to the teacher instead of the email address set up in the SMTP settings.

1. On the Home screen, click **Options**.
2. Click **Settings**.
3. Under Mass E-mail Settings, enter the username and password for your email account. If you don't know these settings, contact your system administrator.
4. To have replies sent to a different email address, such as a general school inbox, enter the alternate email address in the **E-mail Address for Replies** field.
5. In the Signature text box, enter the name, title, or other information you want to be applied to the bottom of each mass email.

Send a Mass Email

After you create or edit correspondence, you can email it to multiple recipients from within HeadMaster. The advantage of using HeadMaster to send correspondence via email is that you can log the email on the individual's Communication tab so you can reference it at a later time.

Prior to sending correspondence via email:

- Set up mass email settings. For more information, see [Set Up Mass Email Settings](#) on page 47.
- Enter SMTP server settings. For more information, see [Set Up SMTP Settings](#) on page 46.
- Create or edit the correspondence.
- Filter the correspondence recipient list.

To send a mass email

1. On the Home screen, click **Correspondence**.
2. Double-click the correspondence you want to send and click **E-mail**.
3. The From field is automatically populated with your school's name. You can edit this field. The name in the From field appears in the recipient's inbox.
4. In the Subject field, enter a description of your email.
5. The username and password default from the settings entered in the mass email settings and SMTP server settings. You can enter an Email Address for Replies if they should be sent to a different address, such as a teacher assistant's email address.
6. In the Signature field, enter your name and title as it should appear in the email. You can leave this blank if you've already included this in your correspondence.
7. To send the email, click **Next**.
8. After HeadMaster sends the mass email, it displays a list of individuals who didn't receive the email and the reason for the failure.
9. Click **Close**.
10. The Log Printing/Email dialog box displays. Enter the information and click **Save Log**.

Useful Information: When you are emailing documents that are longer than one page, you should use the **Attach File** option. For OnDemand users, we recommend that you not send a file that exceeds a 1.75M. Desktop users should contact their email provider to find out the recommended maximum file size.

Send an Email to an Individual

You must have an email program, such as Outlook® or Thunderbird™ installed on your computer and you must have Internet access. You can look up and send an email to any individual in your data. This method sends a single email to one individual.

1. On the Home screen, click **Students, Parents, Teachers, Staff, Prospective, or Other People**.
2. Double-click the individual you want to send an email to.
3. Click the **Phone** tab.
4. If there is more than one email address, click to select the one you want to use.
5. Click the **Send E-mail** button.
6. Your default email application opens with the email address you selected filled in. Enter your message and click **Send**.

Useful Information: You can also send an email to an individual from any list view of individual records. On the toolbar, click **Send E-mail**.

Edit and Delete Correspondence

You can edit and delete letters you composed in Correspondence.

1. On the Home screen, click **Correspondence**.
2. Select the letter you want to edit or delete and click **Edit** or **Delete**.
3. If deleting, a confirmation dialog box displays. Click **Yes**. If editing, revise the document as needed and click **OK**.
4. HeadMaster automatically saves the document for use within the program. To save the letter for use in another program, on the File menu, click **Save As**. In the File Name box, enter a name for the file and click **Save**.

Filter Correspondence Recipients

There are two ways to filter the list:

- The first filter starts with a list of individuals based on the Document type you selected. It can be narrowed by removing individuals from the list that shouldn't receive the correspondence. For example, if the document type is Students, then students appear in the filtered list and individual students can be added to the list.
- The second filter is based on saved search criteria. These criteria can be set up and saved by clicking **Searches**. Use this filter method when the list of recipients is more complex than a general group of individuals. For example, you may want to send a letter to active senior students or to the parents of 4K children with no immunization records.

To filter the list of potential recipients of the correspondence

1. On the Home screen, click **Correspondence**.
2. Double-click the correspondence you want to filter, and click the **Filter/Search** tab.
3. Select **Print only these individuals in the list** and click **Select**. The Select Individual dialog box displays.
4. In the Search for field, enter the name of a student you want to add and click the **Student Name**.
5. Click **OK**.
6. Continue this process until all names for the correspondence have been added to the list.
7. Click **OK**.
8. On the Home screen, click **Correspondence**.
9. Double-click the correspondence you want to filter, then click the **Filter/Search** tab.
10. Select **Print only these individuals in the list** and click **Search**.
11. Click the **Search** list and select the search you want to use. Click **OK**.
12. All individuals that fit the search criteria display. Select any you don't want to send correspondence to, then click **Remove**.
13. Click **OK**.

When selecting recipients in the Correspondence window, teachers can filter the class roster to display the names of students in a particular class. First, create the correspondence you plan to send to parents or students. In the Correspondence window, the Document Type must be Parent or Student. Save your correspondence. For more help creating correspondence, on the Home screen, click **Correspondence**. When the Correspondence List window opens, on your keyboard, press F1 to view online help.

1. On the Home screen, click **Correspondence**.
2. Double-click the letter or email you want to send.
3. Click the **Filter/Search** tab.
4. Select **Print only these individuals in the list**.
5. Click **Select**.
6. In the Select Class list, select the class.
7. Click **OK**.
8. You can then select individual students and click **Remove** to delete them from the correspondence list; or, to add additional classes, click **Select** and repeat steps 6 and 7.

Useful Information: This feature is available for those using a Teacher Login.

Activate the Correspondence Log

The Correspondence Log keeps a record of letters or email sent to individuals. When you print a letter or send email to an individual, a log of the correspondence appears on the Communications tab for that individual. Before you can track correspondence in the log, though, you must activate the correspondence log.

Useful Information: The Log Correspondence feature only applies to letters and emails produced in the Correspondence window.

1. Click **Settings**.
2. Under Log Settings, select **Log Correspondence Print Activity**.
3. Click **Close**.

Delete the Correspondence Log

You can delete the log for all existing correspondence or for correspondence within a specific date range.

1. In the File menu, select **Mass Change**.
2. Expand Individual and select **Correspondence Log**.
3. Under Select Date, select **All Dates** or **Date Range**.
4. Click **Delete**.

Insert a Field in Correspondence

You can insert Headmaster data fields in new or existing correspondence in order to merge personal information with a form letter. For example, if you're typing a letter to all parents of 4K students, you can enter fields that'll merge the parent's name, mailing address, and student's name with your standard text.

1. On the Home screen, click **Correspondence**. Create a new letter or edit an existing letter.
2. Field names are located to the right of the editor in the Fields For dialog box. To insert a field name in the body of the letter, double-click the **F**ield **N**ame or click the name and **I**nsert **F**ield.
3. To save changes and close the editor, click **OK**.

Print Correspondence

After you create or edit correspondence, you can print a copy for each recipient. Once printed, HeadMaster prompts you to log the correspondence on the individual's Communication tab so you can reference it at a later time.

Prior to printing correspondence, you must:

- Create or edit the correspondence
- Filter the correspondence recipient list

To print

1. In the Correspondence window, click **Print**.
2. In the Printer Name list, select a printer.
3. Select the option that best describes the pages you want to print.
4. Enter the number of copies of each letter you want to print. For example, if you enter 2, two copies of each letter will print.
5. Click **OK**.
6. The Log Printing/Email dialog box displays. Enter the correspondence information, then click **Save Log**.

Set Up Correspondence

You can compose letters, email, or other document types with the Correspondence tool. Be aware that when you're emailing documents that are longer than one page, you should use the Attach File option. We recommend to not exceed a 5MB file size.

Useful Information: If you log in as a teacher, you'll be able to correspond with other teachers and staff, but under Student and Parent correspondence, you'll be able to select only students enrolled in your class and the parents associated with them.

1. To create a new letter or email, click **New**.
2. Enter a name and description for the correspondence. Click the **Document Type** list and select a type. Enter notes in the **Notes** field.
3. To open the editor, click **Create**. Type a letter in the editor, inserting data fields as needed.
4. To save your changes and return to the correspondence list, click **OK**. HeadMaster automatically saves the document for use within the program. To save the letter for use in another program, on the File menu, click **Save As**. In the File Name field, enter a name for the file. Click **Save**.
5. To generate the letter, click **Print** or **E-mail**, depending on what you want to do with the document. One letter will be created for each individual who is a member of the group selected in Document Type. For example, if you selected Student, then a letter will be generated for each student. If you would like to filter the recipient list, click the **Filter/Search** tab.
6. To close the Correspondence window, click **OK**. You may return to the Correspondence window to edit letters and emails at any time.

Additional Field Descriptions

Copy to Sender

Do Not Copy – The default selection. The sender receives no email copies

Carbon Copy (1 per E-Mail) – The sender receives a carbon copy of each email.

Blind Carbon Copy (1 per E-Mail) – The sender receives a blind carbon copy of each email.

Copy original message to sender – The sender receives a single copy of the email, even if there are multiple recipients. If the sender created the email message using text fields, the sender receives a copy of the email containing the default text fields. For example, if the sender inserted the Birth Date field in the email message, the email copy will contain <dbtext>Birth Date</dbtext> instead of each email recipient's actual birth date information.

Manage ZIP Codes

A list of frequently used ZIP Codes are stored in HeadMaster to help minimize repetitive data entry. ZIP Codes are automatically added to this list each time a ZIP Code is entered for an individual. You can also add to this list manually. Additionally, you can set a default ZIP Code to be used in the absence of the user entering one. The default ZIP Code should be the most frequently used one.

When you enter a default ZIP Code, HeadMaster automatically uses the ZIP Code in the absence of a user entering one. If necessary, the user can type over the default ZIP Code when entering data.

1. On the Home screen, click **Options**.
2. Click **Default ZIP Code**.
3. Enter the **ZIP Code** information and click **Close**.

You can add a new ZIP Code to a list of frequently used ZIP Codes. ZIP Codes are also added to this list automatically if a ZIP Code is entered on an individual record.

1. On the Home screen, click **ZIP Codes**.
2. Click **Add**.
3. Enter the information associated with the **ZIP Code**.
4. Click **OK**.

Because ZIP Codes are automatically added to the list of frequently used ZIP Codes, you should occasionally review the list and do some housekeeping. You can edit or delete ZIP Codes from this list.

1. On the Home screen, click **ZIP Codes**.
2. Double-click **ZIP Code**.
3. Change the ZIP Code information and click **OK**.
4. On the Home screen, click **ZIP Codes**.
5. Select a ZIP Code and click **Delete**.
6. When the confirmation message displays, click **OK**.

Background Checks

In today's world, it's important to know exactly who is volunteering, serving, working, and caring for your church or school family. That's why we've partnered with Verified First to bring you comprehensive, detailed, and convenient background checks.

Background Checks features include:

- **A secure online application.** Protect applicants by allowing them to enter their personally identifiable information at their convenience. You can launch email invitations straight from the product and reports sync back to individual profiles.
- **Additional controls over staff rights.** Choose who can submit background checks, view results, or do both.
- **Pay one bill, not two.** We've consolidated billing, so you'll receive just one statement from ACS Technologies.
- **Comprehensive results.** Verified First offers several background check packages to fit your church's needs. All packages include a Nationwide Criminal Search and Social Security Number trace.

Sign up for Background Checks

If you're new to background checks in HeadMaster, you must sign up for a Verified First account. Your church only needs one Verified First account- every staff member who requests or reviews background checks use this account.

To sign up for a Verified First account

1. Log into HeadMaster as an administrator.
2. On the Home screen, click **Other People, Parents, Staff, or Teachers**.
3. Double-click an individual's record.
4. On the **Safeguard** tab, click **Request Background Check**.
5. Complete and submit the online agreement for service to Verified First.

Verified First will contact you to review it and process the agreement, and they will send you an email update when finished. After Verified First processes your agreement, you can request background checks.

Create Safeguard Task Descriptions and Statuses

Safeguard Tasks let you manually track your background check process and results. Tasks consist of Task Descriptions and Task Statuses.

- **Task Descriptions** describe tasks you're tracking related to background checks. For example: Signed Consent Form, Drive Church Vehicle, and Work with Children might be task descriptions.
- **Task Statuses** describe the results. For example, Yes, No, Pending, and Restrictions Apply could be task statuses.

You can enter comments for each task, which is helpful if you want to enter notes related to background checks or their results. You can also track dates on tasks, which is helpful if you want to track when a background check was completed so you'll know when to request a new one.

1. On the Home screen, click **Define List**.
2. Under Safeguard, select **Task Description**.
3. Click **Add**.
4. Enter a task description and click **OK**.
5. On the Home screen, click **Define List**.
6. Under Safeguard, select **Task Status**.
7. Click **Add**.
8. Enter a task status and click **OK**.

Add a Safeguard Task

Once you've created Safeguard task descriptions and statuses, Safeguard Tasks let you manually track your background check process and results.

On the individual's **Safeguard** tab, you can add new Safeguard tasks and edit existing ones. For example, if an individual returns a signed consent form, you can update the individual's record to reflect that it was returned and include the date. You can review tasks and the comments associated with them at any time.

Administrators have full access to the Safeguard features and can grant Safeguard rights to users within User Administration.

To add a Safeguard task

1. On the Home screen, click **Other People, Parents, Staff, or Teachers**.
2. Double-click an individual's record.
3. Click the **Safeguard** tab.
4. Click **Add**.
5. In the Task Description drop-down list, select a defined description or choose **<New>** to enter a new description.
6. In the Status Description drop-down list, select a defined description or choose **<New>** to enter a new description.
7. If the task is a completed one, enter a date in the **Date Completed** field.
8. If you want to add comments to the task, enter them in the **Comments** field.
9. If you want to add another task, select **Add Another**.
10. Click **OK**.

Request Background Checks

On the Safeguard tab, you can request background checks on individuals through HeadMaster in partnership with VerifiedFirst. Once a background check is complete, you can view the results. You can also add tasks to track an individual's background checks and the results.

To request a background check

1. On the Home screen, click **Other People, Parents, Staff, or Teachers**.
2. Double-click an individual's record.
3. Click the **Safeguard** tab.
4. Click **Request Background Check**. You will be redirected to Verified First, a separate Web application used for the background checks.
5. If prompted, enter your Verified First **Username** and **Password** in the fields, click **Log In**. To save your username and password, select **Remember Me**.
6. When the order form displays, verify the applicant's personal information, which is uploaded from HeadMaster.
7. In the drop-down list, select the appropriate **Package** based on which background check you're requesting.
8. To email the applicant a link to consent to and complete the background check, click **Send Invite**. To enter the background check information yourself, click **Next**.
9. If you enter the background check information yourself, enter any required information in each step, then click **Next**. If the information is on the applicant's individual record in HeadMaster, it displays in the fields.

Review Background Check Results

With adequate security rights, you can review background checks you have requested to see the status, individual who ordered the background check, date completed, and full details of the results.

To Review Background Check Results

1. On the Home screen, click **Other People, Parents, Staff, or Teachers**.
2. Double-click an individual's record.
3. On the **Safeguard** tab, click **Review Background Checks**.
4. In the Review Background Checks window, select the result you want to view, then click **View**.
5. If prompted, enter your Verified First **Username** and **Password** in the fields and click **Log In**. If you want to save your username and password, select **Remember Me**.
6. After you log in, expand the **Complete** tab to view background checks results.

After reviewing the full results, you can use Safeguard Tasks to enter and track when an individual had a background check and any other information about the results. Staff members who do not have full access to request and review background checks within Verified First can view these tasks, dates, and comments.

Background Check Documents and Consent Forms

Federal law requires that an individual give his or her signed consent to perform a background check. You can obtain this electronically and create customized forms for your organization.

When requesting a background check inside Verified First, you can send individuals an electronic form to verify information and consent. This protects applicants by allowing them to enter their personally identifiable information at their convenience.

1. On the Home screen, click **Other People, Parents, Staff, or Teachers**.
2. Double-click an individual's record.
3. On the **Safeguard** tab, click **Request Background Check**. You will be redirected to Verified First.
4. If prompted, enter your Verified First **Username** and **Password** in the fields, click **Log In**. To save your username and password, select **Remember Me**.
5. When the order form displays, verify the applicant's Personal Information, which is uploaded from HeadMaster.
6. In the drop-down list, select the appropriate **Package** based on which background check you're requesting.
7. To email the applicant a link to consent to and complete the background check, click **Send Invite**.
8. Read the certification message that displays, select the checkbox, and click **Send**.

Here are some sample consent forms that you can customize to suit the needs of your organization. For example, you can tailor a form to ask potential volunteers which area they want to volunteer in, include fields for contact information, and add your organization's logo to the form.

If you create customized forms, you may want to reach out to your legal team to ensure they are still compliant to use.

Manage Custom Fields

Add a Custom Field

You can define custom fields for students, parents, teachers, classes, alumni, or prospective students.

For example, you may want to track locker combinations for students. These fields are called “custom fields.” You can add, edit, and delete custom fields, but you can also lose data if changes are made to an existing field.

When you add custom fields in options, the fields display on the Custom tab for the type of individual you selected during set up.

Useful Information:

- If you want custom fields to display in the grid view for each type of individual, on the Home screen, click **Options > Settings**. Select **Allow Custom Fields in Main Grids**. Be advised that this slows the loading of the grid view.
- When adding custom fields, close all current grids containing the field type you’re adding. For example, if you’re adding student custom fields, the Student grid must be closed.

1. On the Home screen, click **Options**.
2. Click **Custom**.
3. Click the **Type** list, and select an individual type (Student, Teacher, etc.). The custom field displays on the individual window for the type you select.
4. Click **Add**.
5. Enter the custom field properties.
6. Click **OK**.

Additional Field Information

When you add a custom field, you can name the field, set the type and length of the data that can be entered in the field, create a Value list that the user can search values in, set a default value, and mark the field private.

- **Field Name** — Enter a descriptive field label. Examples: College, Highest Degree, Year Graduated from College, Married, Number of Children, and Alumni Pledge.
- **Field type** — The field type limits the type of data that can be entered.
- **Text** — This is the default field type. Text can be words, numbers, or a combination of both. Example: Clemson University, A1-B5-H78.
- **Currency** — Dollar amounts. Example: \$10.00 or .50.
- **Date** — Displays dates in the format of MM/DD/YYYY.
- **Real Number** — Includes rational and irrational numbers, such as decimals and integers (natural numbers, negative numbers, and zero).
- **Whole Number** — A positive integer, such as 1, 50, 100. This field type will not accept negative numbers.
- **Yes/No** — This places a check box in the custom field that the user selects or clears. Example: Married is a yes/no field. The Custom tab displays a check box that is selected for yes, or cleared for no.
- **Field Size** — To limit the number of characters that can be entered, enter a positive number. Example: If your locker combinations have a standard number comprised of 10 digits, set the field size to 10.
- **Category** — If you have more than one custom field, enter categories to organize the fields. Example: The custom fields are categorized by College, Family, and Financial.
- **Default Value** — Enter a selection that will automatically be used by the program in the absence of a choice made by the user.
- **Private Field** — To prevent this field from printing on reports, select this check box.
- **Uppercase** — To force uppercase letters, select this check box.
- **Lookup Values** — To build a list of values that will appear in a Value list, enter each value with a return after it. On the Custom tab, this field will have a Lookup Values list that the user can select from.
- **Must Choose Value from List** — If selected, the user is required to select a value from the list. If clear, the user can enter a value in the field.

Change a Custom Field

You can change a custom field to be tracked for students, teachers, parents, staff, or classes. This could result in the loss of data if you change a field containing existing data.

1. On the Home screen, click **Options**.
2. Click **Custom**.
3. Double-click the custom field that you want to change.
4. Change any of the information.
5. Click **OK**.

Delete a Custom Field

You can delete a custom field to be tracked for students, parents, staff, or classes.

1. On the Home screen, click **Options**.
2. Click **Custom**.
3. Select the field you want to remove and click **Delete**.

Use the Calendar Tab

Add Reminders on the Calendar Tab

You can set up and edit reminders on the Calendar tab or in the Reminder List. However, you can only delete reminders from the Reminder List.

After you set up reminders, they display on the HeadMaster Calendar tab, and the calendar displays a small icon on the date the reminder is set.

1. On the Home screen, click the **Calendar** tab, located at the bottom of the screen.
2. On the date you want to add a reminder, right-click, point to **Add > Reminder**.
3. Enter the reminder information.
4. Click **OK**.

Edit a Reminder or Mark a Reminder Complete

You can edit reminders in HeadMaster after they've been entered.

1. On the Home screen, click the **Calendar** tab, located at the bottom of the screen.
2. Double-click the reminder you want to change.
3. Make your changes to the reminder.
4. To mark a reminder complete, select the **Completed** check box.
5. Click **OK**.

View Assignments (Teachers)

Teachers can add and edit assignments on the Calendar tab. However, assignments can only be deleted from the Assignments List.

After you add assignments to the program, they appear in the assignments area of the Calendar tab and are highlighted on the calendar.

1. On the Home screen, click the **Calendar** tab, located at the bottom of the screen.
2. Under **Assignments**, double-click the assignment you want to view or edit.
3. To close the assignment, click **OK**.

View Individuals Currently Checked In

Administrators can view all individuals who are currently checked in.

To view all individuals currently checked in, on the Home screen, click the **Calendar** tab (located at the bottom of the screen).

To View Today's Attendance

Administrators can view the current day's attendance for all teachers who have posted it.

To view the current day's attendance, on the Home screen, click the **Calendar** tab (located at the bottom of the screen).

Create Lists

Set Up an Activity List

You can define activities and apply them to students, parents, teachers, or classes. HeadMaster contains some predefined activity lists, but you can customize the lists to suit your needs.

Once you set up activity lists, they display on the Activity tab of the student, parent, teacher, or class record.

Add an activity

1. On the Home screen, click **Activities**.
2. Select **Student, Parent, Teacher, or Class**.
3. Click **Add**.
4. Enter a name for the new activity.
5. Click **OK**.

Update the name of an activity

1. On the Home screen, click **Activities**.
2. Select **Student, Parent, Teacher, or Class**.
3. Under List of Available Activities, double-click the description you want to change.
4. Change the name of the activity.
5. Click **OK**.

Delete an activity

1. On the Home screen, click **Activities**.
2. Select **Student, Parent, Teacher, or Class**.
3. Under List of Available Activities, click the description you want to remove.
4. Click **Delete**.
5. When the confirmation message displays, click **OK**.

Set Up Individual Lists

You can customize several types of lists that apply to all individual types. These lists include:

- Address types (home, vacation, other)
- Church affiliations (Baptist, Presbyterian, Catholic)
- E-mail types (home, school, business)
- Phone types (fax, pager, mobile)
- Race (American Indian, Caucasian, Hispanic, African American)
- Relation (grandparent, brother, sister, mother, father)
- Suffix (Jr., Sr., III)
- Title (Rev., Dr., Mrs., Mr., Miss)

For general information about how you can use Define Lists to customize data entry for your organization's specific purposes, see [Customize Program Options and Lists](#) on page 83.

Create a list

1. On the Home screen, click **Define List**.
2. Under **Individual**, select the list type (Address Types, Church Affiliation, etc.) that you want to create.
3. Click **Add**.
4. Enter a description.
5. Click **OK**.

Edit a list

1. On the Home screen, click **Define List**.
2. Under **Individual**, select the list type (Address Types, Church Affiliation, etc.) that you want to edit.
3. In the list of available types, double-click the description that you want to change.
4. Enter a new description.
5. Click **OK**.

Delete a list

1. On the Home screen, click **Define Lists**.
2. Under **Individual**, select the list type (Relation, Suffix, Title, etc.) that you want to edit.
3. In the list of available types, click the description you want to remove.
4. Click **Delete**, and **Yes**.
5. Click **OK**.

Edit an Individual's General Information

Change an Individual Phone Number

Individual numbers are unique numbers used to identify the individual, whether a student, parent, teacher, staff, other, or prospective. These numbers are located on the General tab of the individual's record.

1. On the Home screen, click **Students, Parents, Teachers, Staff, Other People, or Prospective**.
2. Double-click an individual's record.
3. On the General tab, change the **Individual #**.
4. To save changes, click **OK**.

Change an Individuals' Active Status

You can change the active or inactive status for individuals or for a group of individuals, such as students, parents, teachers, or staff. For more information about activating a group of individuals using Mass Change, see [Activating or Deactivating a Group of Individuals](#). For information about deactivating a family, see [Deactivate a Family or Family Members](#).

Note: If you are activating a student who has classes, the student will be re-activated in all of the classes unless you clear the class check boxes in the Confirm dialog box.

Activate or reactivate a student

1. On the Home screen, click one of the following individual icons: **Students, Parents, Teachers, Staff, Prospective Students, Alumni, or Other People**.
2. Double-click the individual's record.
3. Click the **General** tab.
4. Select the **Active** check box. (Depending on the individual type, this may be labeled "Active Student," "Active Contributor," etc.)
5. Clear the check boxes for any classes that you don't want to reactivate the student in.
6. Click **Close**, then **OK**.

Deactivate an active student

1. On the Home screen, click one of the following individual icons: **Students, Parents, Teachers, Staff, Prospective Students, Alumni, or Other**.
2. To select the individual's record, double-click the name.
3. Click the **General** tab.
4. Clear the **Active Student** check box.
5. To enter the Date Deactivated, click the lookup button and select a date.
6. Click **OK**.

Change a Preferred Name

A preferred name is the name that an individual wants to be called. For example, a student named Alexander, may like to be called Alex instead. You can edit the name that a student, parent, teacher, staff, prospective, or other prefers to be called.

1. On the Home screen, click one of the following individual icons: **Students, Parents, Teachers, Staff, Prospective Students, or Other People.**
2. Double-click the individual's record.
3. Click the **General** tab.
4. Change the **Preferred Name.**
5. Click **OK.**

Immunization Records

Store Immunization Records

Immunizations are the preventative shots students receive on a schedule to inoculate them against infectious diseases and illnesses. Using HeadMaster, you can track the immunizations that are important to your school, state, or district. HeadMaster contains the names of many standard inoculations already entered, but you can customize this list.

When immunizations are entered on the prospective or student record, dates are associated with them. Therefore, instead of entering a series of shot names in the Immunization List (such as Hepatitis 1, Hepatitis 2, and Hepatitis 3), enter Hepatitis only once in the Immunization list. Then, on the prospective or student record, add Hepatitis and associate three different dates with the immunization.

To add or edit an immunization

1. On the Home screen, click **Immunizations**.
2. To add an immunization, click **Add**.
3. To change an immunization, click **Edit**.
4. Enter or edit the name of the immunization.
5. Click **OK**.
6. When you're finished setting up immunizations, click **OK**.

To delete an immunization

1. On the Home screen, click **Immunizations**.
2. Click the immunization you want to remove from the list.
3. Click **Delete**.
4. Click **OK**.

Add Immunization Records

After you set up or revise an immunization list for your school, you're ready to add immunization information, such as the name of the vaccine, the date received, and date due to the prospective and student records.

1. On the Home screen, click **Students** or **Prospective Students**.
2. Double-click on an individual's name.
3. Click the **Immunizations** tab.
4. Click **Add**.
5. Click the **Immunization** drop-down list, then select a vaccine.
6. Click **Add**.
7. Enter the date.
8. Click **OK**.

Edit or Delete Immunization Records

You can edit or delete immunization information from a prospective or student record.

To edit an immunization record

1. On the Home screen, click **Students** or **Prospective Students**.
2. Double-click on an individual's name.
3. Click the **Immunizations** tab.
4. Click **Edit**.
5. Change immunization information.
6. Click **OK**.

To delete an immunization record

1. On the Home screen, click **Students** or **Prospective Students**.
2. Double-click on an individual's name.
3. Click the **Immunizations** tab.
4. Click to select an immunization record and click **Delete**.
5. Click **Yes**.

Update Immunization Records

After you set up or revise an immunization list for your school, you're ready to track the dates those immunizations are received by the students.

1. On the Home screen, click **Students** or **Prospective Students**.
2. Double-click on an individual's name.
3. Click the **Immunizations** tab.
4. Select an immunization from the grid, then click **Edit**.
5. Click **Add**.
6. Enter the date, then click **OK**.

Useful Information:

Current statuses of each immunization you will see in the grid

- **Completed** – All immunizations in the series have been given.
- **Overdue** – Required immunizations are out of date.
- **Not Set Up** – Required immunizations have not been assigned.
- **Missing DOB** – NO date of birth is entered for the selected student.
- **Current** – Required immunizations are up to date.

Update Immunizations for Multiple Students

The school nurse or other administrator can mass add or remove specific immunizations using the Manage feature.

1. On the Home Screen, click **Immunizations**.
2. Select the immunization you want to add or remove and click **Manage**.
3. If you intend to update prospective students' immunization records, as well, select **Include Prospective**.
The All list will update to include their names.
4. Select students from the All list to apply the change to and click **Add** (or double-click the name). To remove students from the Selected list, select them and click **Remove** (or double-click the name).
5. When finished selecting students, click **OK**.

Useful Information: On your keyboard, press and hold **Ctrl** to select multiple students, or press and hold **Shift** to select blocks of students. You can also use **Add All** or **Remove All** to assign or delete an immunization for the entire list.

Customize Program Options and Lists

There are ways to make data entry more efficient and to customize the HeadMaster program so that it contains lists or data specific to your organization. In many cases, you can create or customize lists of items that display in HeadMaster. For example, you can set up various address, phone, and email types such as home, business, or alternate. You can customize lists of church affiliations, name suffixes and titles, races, and people relationships to suit various geographical or cultural differences represented in your community or school.

An overview of program options and defined lists is provided below. However, specific program options and lists are explained in further detail in other sections of this user guide. In addition, to get help with setting up options and defining lists, press the F1 key on your keyboard from any option or define list window.

- To view or set up defined lists, on the Home screen, click **Define Lists**.
- To view or customize options, on the Home screen, click **Options**.

Use Define List to customize HeadMaster to better suit your organization's needs. Define List displays a tree-view list of available fields that are used in lists throughout HeadMaster.

Although HeadMaster contains default lists, you can customize these lists by adding, editing, or deleting items contained in them.

To view the Define Lists window, on the Home screen click **Define Lists**.

Select the option you want to enter a value for. Click **Add**, enter the value indicated and click **OK**.

The HeadMaster Options window contains a list of items that should be set up prior to using the program. For example, Options is where you store default school information and the school logo, SMTP Settings for connecting to your email or the Internet, skill codes, department names, and more. To view the Options window, on the Home screen, click **Options**.

Change Your Password

You can change your password at any time.

To change your password

1. On the Tools menu, click **Change Password**.
2. Or, on the Home screen click **Change Password**.
3. Enter the requested password information and click **OK**.

HeadMaster Import







The purpose of the HeadMaster Import process is to reduce your amount of manually keyed data and save you hours of time at the keyboard. You can use the import process to pull names, addresses, as well as multiple other categories of student contact data from .csv or .xml import files into

HeadMaster. To ensure the import process works properly, your import file should contain separate columns for each data category. For example, each data category such as Last Name, First Name, Date of Birth, etc. should have its own column.

The imported data does not overwrite your existing data. It only adds students to your existing database. For example, if you have John Smith entered in HeadMaster, and then you add his data with a new import, you'll have two entries for John Smith within your database.

Useful Information: To use the HeadMaster Import process, you must have created a backup of your program data within the past 2 days.

Importing data into HeadMaster is accomplished through mapping (or linking) fields in your import file with the appropriate fields in HeadMaster. The procedure below will guide you through the process.

1. Open the **HeadMaster Import**.
 - a.) **Windows 7:** On your Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Click **All Programs > HeadMaster > HeadMaster Import**. Log in with your username and password and click **OK**.
 - b.) **Windows 8.1:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the HeadMaster section, click **HeadMaster Import**. Log in with your username and password and click **OK**.
 - c.) **Windows 10:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the HeadMaster section and click **HeadMaster Import**. Log in with your username and password and click **OK**.
2. The HeadMaster Import dialog box displays. Click the  ellipses button and browse to the file that you want to import.
3. Select whether the imported data is for enrolled or prospective students.
4. In the Data View section, verify that you are importing the correct data.
5. Click **Next**.
6. Click and drag each Source Field category from the left column to an equivalent category in the right column. In this step, you're *mapping* the fields. Click  to expand other data categories that you may want to map and import.
7. If your import file is one that you'll use more than once, you can click **Save Map** in the upper-right corner of the window. You'll be prompted to provide a name for your new *map file*. In the future, you can access your saved map files by clicking **Load Map** whenever you're in this window.
8. Click **Finished**.

Useful Information: The Last Name is the only required field for import. Any record that doesn't have a last name is imported and given the last name "Converted (no last name)."

Once you've imported your data, you should verify that it imported correctly. If the import results are incorrect, you can correct any issues in the import file; restore the last backup that you made; and then run the import process again.

Activate or Deactivate a Group of Individuals

When multiple individuals need to be deactivated or activated, you can save time by using the Mass Change feature.

1. On the File menu, click **Mass Change**.
2. Double-click **Individual**.
3. Click **Individual Types**.
4. In the Select Type drop-down list, select **Student, Parent, Teacher, or Staff**.
5. Click a name to select an individual. To select multiple individuals, on your keyboard, press and hold **Ctrl** while clicking individual names. To select a block of individuals, click the first name in the block, press and hold **Shift**, and then click the last name in the block.
6. Select either **Activate** or **Deactivate**.
7. Click **Change**.
8. To confirm, click **Yes**.
9. Click **OK**.

HeadMaster SchoolCast™ Export

In an effort to maximize the effectiveness of communication between schools and parents/faculty, HeadMaster has partnered with SchoolCast™ by High Ground Solutions. What does this mean for you?

SchoolCast offers a rapid communication solution for schools needing to immediately inform targeted groups of people about things such as student events, school closings, faculty meetings, etc. With SchoolCast, you can even schedule automatic phone calls regarding attendance issues and lunch balances.

Taking advantage of these great features involves exporting your HeadMaster data to the SchoolCast Notification System. Headmaster has made this task as easy as possible through the use of an export process which guides you one screen at a time through creating an export file with customizable fields.

To export HeadMaster data to SchoolCast

1. Go to your HeadMaster directory (Example: C:\HMaster) and double-click the **SchoolCast Export.exe** file.
2. The first screen of the wizard displays. Click **Next** and proceed through each screen.
3. On the last screen, click **Export**.

HeadMaster OnDemand users can set up the SchoolCast export as a scheduled task. You might want to consider the scheduled task especially if you already run other tasks on a regular schedule.

Before scheduling the export, you must run the export manually the first time in order to select and save the export settings you want.

To schedule the HeadMaster data export to SchoolCast through OnDemand

1. On the OnDemand overlay menu, double-click the SchoolCast Export icon.
2. The first screen of the wizard displays. Click **Next** and proceed through each screen.
3. On the last screen, click **Export**.
4. After the export, on the OnDemand overlay menu, double-click the Schedule Tasks icon.
5. The Scheduler dialog box displays. Click **Add**.
6. The Schedule a Task dialog box displays. On the drop-down menu, select **SchoolCast Student/Staff Export**.
7. Select the time and days you want the scheduled task to run and click **OK**.
8. The Scheduler dialog box displays. On the schedule grid, verify the SchoolCast schedule and click **Close**.

Implement New School Year Procedures

The annual preparation for a new school year is a major task for your school, and it's important that your school performs that task well every year. There are a number of HeadMaster procedures that you can use to ensure that your school is properly prepared for the new school year.

Useful Information: At beginning of a new school year, you may find it necessary to create a new, empty database.

Note: You must have performed your promotions to the new school year before implementing the new school year procedures.

New School Year Procedures

Set up the School Information

The first procedure is setting up your term description.

1. On the Home screen, click **Options**.
2. In the Term section, enter the new school year in the **Description** field. Example: 2012-2013
3. Click **Close**.

Set Up Grading Period Dates

To have correct attendance totals appear in HeadMaster and on the student report cards, you must set up the grading period dates for the new school year.

1. On the Home screen, click **Options**.
2. Click **Grading Periods**.
3. From the tabs at the bottom of the screen, click a grading period.
4. Click **Set Dates**.
5. For each period, enter a Start Dates and End Dates.
6. Click **Close**.
7. If needed, select another Grading Period.
8. After you enter all the dates you want, click **Close**.

Upload HeadMaster Online Grading Period

If you use HeadMaster Online, you need to select the appropriate grading period to be uploaded.

1. On the **Home** screen, click **Options**.
2. Click **HM Online**.
3. In the Active Period section, select the appropriate grading period.
4. Click **Close**.

Upload a New Data Set for HeadMaster Online

If you use HeadMaster Online and have been using scheduled automatic uploads, you must select a new data set to upload.

1. On the Home screen, click **Options**.
2. Click **Scheduled Tasks**.
3. In the Automated Upload Settings, select the new data set.
4. If you are using HeadMaster Lunch and would like to automatically import preorders, select the **Import Lunch Preorders** check box.

Enroll Prospective Students

If you have been using Prospective Students to manage the waiting list for new students to your school, you must move those students to the Active Student list. You can enroll one student at a time or multiple students at the same time.

Enroll a student

1. On the Home screen, click **Prospective Students**.
2. Double-click the student you want to enroll.
3. Click the **Enrollment** tab.
4. Ensure the Status information is complete.
5. Click the **Enroll Now**.

Enroll multiple students

1. On the Home screen, click **Prospective Students**.
2. Select multiple students while pressing **Shift** or **Ctrl** on your keyboard.
3. On the icon toolbar, click **Actions**.
4. Click **Enroll**.
5. Click **OK**.

Enter New Students

The Add Student Assistant provides a convenient way for you to enter new students.

1. On the Home screen, click **Add Student**.
2. Enter the student's information.
3. Click **Next**.
4. Select **Enter new family information**.
5. Click **Next**.
6. Enter the Primary Family Information.
7. Click **Next**.
8. If there is no secondary family, select **None**. If secondary family information is available, select **Enter new family information**.
9. Click **Next**.
10. Enter secondary family information (If applicable).
11. Click **Next**.
12. Enter emergency contact and pickup information.
13. Click **Finish**.

Assign Homeroom Teachers

You have the ability to mass assign homeroom teachers if you have not retained homeroom teachers during the promotion process. You can move groups of students from one homeroom teacher to another, or you can select different students for each homeroom teacher.

To move groups of students from one homeroom teacher to another

1. On the Home screen, click **File**.
2. Click **Mass Change**.
3. Click to expand **Students**.
4. Click **Homeroom Teacher**.
5. In the Options section, select **Search and Replace**.
6. In the **Value to Change** field, click the drop-down arrow and select the current homeroom teacher.
7. In the **New Value** field, click the drop-down arrow and select the new homeroom teacher.
8. Click **Change**.
9. Click **Yes**.
10. Click **OK**. To change more homeroom teachers, repeat steps 5-10.

To select different students for each homeroom teacher

1. On the Home screen, click **File**.
2. Click **Mass Change**.
3. Click to expand **Students**.
4. Click **Homeroom Teacher**.
5. In the Options section, click **Select Individual**.
6. Click **Select**. The Select student dialog box displays.
7. Click the **Grade Level** column header.
8. Select multiple students while pressing **Shift** or **Ctrl** on your keyboard.
9. Click **Add**.
10. Click **OK**.
11. In the **New Value** field, click the drop-down arrow and select the new homeroom teacher.
12. Click **Change**.
13. Click **Yes**.
14. Click **OK**.

Enroll Students in Classes

You can enroll multiple students into multiple classes at the same time, or you can do student schedules one at a time.

1. On the Home screen, click **Student Schedule**.
2. Select a scheduling option. The following procedure steps will assume selecting the first scheduling option.
3. Click **Next**.
4. Select the students you want to create schedules for. Select multiple students while pressing **Shift** or **Ctrl** on your keyboard.
5. Click **Add**.
6. Click **Next**.
7. Select the classes you want to add to the student schedules and click **Add**. Select multiple classes while pressing **Shift** or **Ctrl** on your keyboard.
8. Click **Save**.
9. To continue adding classes, click **Yes**.

Set Up the School Calendar

The School Calendar is created using the start and end dates of your grading periods. Before you begin adding events or closings to the calendar, ensure your grading periods are set up properly.

To create an event on the school calendar

1. On the Home screen, click **Tools**.
2. Click **School Calendar**.
3. Enter the **Start Date**.
4. Enter the **End Date**.
5. Select the **Type**.
6. Select the days the school meets.
7. Click **OK**.

To choose a calendar type

1. On the Home screen, click **Tools**.
2. Click **School Calendar**.
3. On the calendar, right-click a date.
4. Select the calendar option that you want. (To add more items to the calendar, repeat steps 3-4)
5. To save the calendar, click **OK**.

To print a calendar

1. On the Home screen, click **Tools**.
2. Click **School Calendar**.
3. On the calendar, click **Print** and select the view that you want to print.

Reset Lesson Plans

If your teachers have been using the Lesson Plans feature and you have copied the lesson plans to the new data set, you can reset the dates for all teachers' lesson plans.

1. On the Home screen, click **Tools**.
2. Click **School Calendar**.
3. Click **Reset Lesson Plans**.
4. Enter the date for the first day that the lesson plans begin.
5. Click **Run**.
6. After the lesson plans have been rescheduled, click **OK**.
7. To close the school calendar, click **OK**.

Enter New Teachers and Staff

When you add a teacher, a staff record is automatically created. However, when you add a staff person, a teacher record is not created.

To add a new teacher

1. On the Home screen, click **Teachers**.
2. Click **New**.
3. Enter personal information on each tab.
4. To save the teacher record, click **OK**.

Set Up the Lunch Calendar

You can customize a weekly or monthly lunch calendar by adding items to days in Lunch Calendar.

1. On the Home screen, click **Lunch**.
2. Click **Lunch Calendar**.
3. Click the calendar arrows to select a month.
4. Click a calendar date.
5. In the Menu Items column, double-click each menu item that you want to add. You can also right-click a calendar date and add the menu items in that manner.
6. To add multiple menu items at the same time, select them while pressing **Shift** or **Ctrl** on your keyboard and then click **Add Item to Selected Day**.

Copy a lunch calendar

1. On the Home screen, click **Lunch**.
2. Click **Lunch Calendar**.
3. Click a calendar date.
4. Click **Copy/Paste**, and then click either **Copy Day** or **Copy Week**.
5. Click the calendar date to which you want to copy the menu items.
6. Click **Paste**.

Delete a menu item on a lunch calendar

1. On the Home screen, click **Lunch**.
2. Click **Lunch Calendar**.
3. Click a calendar date and click the menu item you want to delete.
4. Click **Delete**, and then click **Delete Item**. Click **Clear Day** to delete all the menu items for the selected day.

Change Billing Code Amounts

Your tuition and registration may increase each year. However, you do not need to enter new billing codes. You can simply edit the existing billing codes with the new price.

1. On the Home screen, click **Define List**.
2. Click to expand **Billing**.
3. Click **Billing Codes**.
4. Click the billing code you want to edit.
5. Click **Edit**.
6. Change the amount. (To edit more billing code amounts, repeat steps 4-6)
7. Click **OK**.