



# HeadMaster Guide for Administrative Staff

2022



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## Integrate HeadMaster Online Information with Your School's Web Site

Once you're up and running with HeadMaster Online, you'll want to provide access to it from your school website. Your school's web administrator can create a link that points to the following URL:

```
https://secure.headmasteronline.com/hmolweb/login.aspx?SiteNumber=#####  
(Replace ##### with your school's site number.)
```

This URL removes the Site Number field from the login window. So, your HeadMaster Online users only have to enter their username and password without having to recall your school's site number. This makes their login experience simple and convenient.

How about a link on the school website for prospective students to apply for admission? Just have your web administrator create a link that points to the following URL:

```
https://secure.headmasteronline.com/hmolweb/newstudentinfo.aspx?site=#####  
(Replace ##### with your school's site number.)
```

### Examples

If your school's site number is 999999, both of the URLs should be entered on the school website like this:

```
https://secure.headmasteronline.com/hmolweb/login.aspx?SiteNumber=999999  
  
https://secure.headmasteronline.com/hmolweb/newstudentinfo.aspx?site=999999
```

Insert the following URL:

```
https://secure.headmasteronline.com/hmolweb/publicevents.aspx?sitenumber=#####  
(Replace ##### with your school's site number.)
```

Since this links to your HeadMaster Online site, the HeadMaster banner and header will display by default. However, visitors won't be required to log in to HeadMaster Online in order to view the announcements on the page.

## Hide the HeadMaster Banner and Header

If you want to hide the HeadMaster banner and header, use the following URL:

```
https://secure.headmasteronline.com/hmolweb/publicevents.aspx?sitenumber=####&NoHeader=true  
(Replace #### with your school's site number.)
```

**Useful Information:** You can insert either of the URLs in an <iframe> HTML tag. This will dock the announcements in a separate window within your website. That way, visitors won't be directed away from your school website.

## Set up Financial Upload Options

If you use HeadMaster Billing or interface with ACS Accounts Receivable, you can upload statements to HeadMaster Online for parents to view and print.

1. This allows families to check their payment history and current balance due.
2. In HeadMaster, on the Home screen, click **options**.
3. Click **HMOnline**.
4. Under Financial Upload, make a selection.
5. If you selected ACS Accounts Receivable, click **Select**, and select the ACS data set you want to upload.
6. Click **Close**.
7. In the ACS Reports window, under Accounts Receivable, expand Extracts and select **HeadMaster Online Extract**.
8. Under HeadMaster Online Extract, click **Customize**.
9. On the Options tab, **select Print One Per Family**.
10. Make any additional selections you want and click **Extract**.
11. Once the extract is complete, click **OK**. You can now upload the extract to HeadMaster Online.

### Tip:

Before you upload ACS Accounts Receivable data to HeadMaster Online, make sure you're using ACS Version 10.0.1.6, 10.2.1.1, or later, and complete the following tasks:

- Import your student records from HeadMaster into ACS Accounts Receivable.
- In ACS Accounts Receivable reports, generate the HeadMaster Online Extract.

We recommend that you also select **Group Payments with Invoices**.

## Perform Billing Inquiries

Your financial office can specify an email address for parents to use when they have billing questions.

1. In HeadMaster, on the Home screen, click **Options**.
2. Click **HM Online**.
3. In the Billing Contact E-mail field, enter the email address that financial questions should be sent to.
4. Click **Close**.

View a Family's Credit Balance

If you use HeadMaster Billing and a family has a credit balance, it will only display on the Overview page if you also use Accounts Receivable or Lunch:

| Overview   |   | My Profile         | Homework            | Academics  | Attendance | Behavior          | Schedule | Calendar | Reports | Enrollment | Lunch  |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
|--|---|--------------------|---------------------|--|------------|-------------------|----------|----------|---------|------------|--------|----------|--------|----------------------|------------------------------|---|--|--|--|--|--|----------------|---------------------|-------------------------------------|---|--|---|-------------------------------------|--|--|---|-------------------------------------|---|--|---|-------------------------------------|---|--|---|-------------------------------------|---|--|---|--|-------------------------------------|--|---|-------------------------------------|---|--|---|-------------------------------------|---|--|---|--------------------------|--|--|--|---------------------|--|--------------------|--|---|--|---|--|-----------------|--|--|--|------------------|--|--------------|--|---------|--|---|--|
| <b>Parent Page</b>   |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Date of Last Upload: Monday, August 22, 2016   |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>I Want to View ...</b>  |   |                    |                     | <b>My Children's Activity</b>  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <a href="#">My Complete Profile</a><br><a href="#">My Children's Homework</a><br><a href="#">My Children's Academics</a>   |   |                    |                     | <a href="#">My Children's Attendance</a><br><a href="#">My Children's Behavior</a><br><a href="#">My Children's Schedule</a>   |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>School Announcements</b>  |   |                    |                     | <table border="1"> <thead> <tr> <th colspan="2">Andrew</th> <th>Brison</th> <th>Michelle</th> </tr> </thead> <tbody> <tr> <td colspan="4"><b>Class Activity</b></td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;"><b>Average</b></td> <td style="text-align: center;"><b>Announcement</b></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Mathematics</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Spelling</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Computers</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Handwriting</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Bible</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td></td> <td><a href="#">Art - 1st Grade-Art</a></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-Science</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><a href="#">1st Grade - Baker-History</a></td> <td></td> <td style="text-align: center;">1</td> </tr> <tr> <td colspan="4"><b>School Attendance</b></td> </tr> <tr> <td colspan="2" style="text-align: center;"><b>YTD Absences</b></td> <td colspan="2" style="text-align: center;"><b>YTD Tardies</b></td> </tr> <tr> <td colspan="2" style="text-align: center;">5</td> <td colspan="2" style="text-align: center;">4</td> </tr> <tr> <td colspan="4"><b>Behavior</b></td> </tr> <tr> <td colspan="2"><b>Unit Type</b></td> <td colspan="2" style="text-align: center;"><b>Total</b></td> </tr> <tr> <td colspan="2">Demerit</td> <td colspan="2" style="text-align: center;">7</td> </tr> </tbody> </table> |            |                   |          |          |         |            |        | Andrew   |        | Brison               | Michelle                     | <b>Class Activity</b>   |  |  |  |  |  | <b>Average</b> | <b>Announcement</b> | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Mathematics</a> |  | 1 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Spelling</a> |  | 1 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Computers</a> |  | 1 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Handwriting</a> |  | 1 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Bible</a> |  | 1 |  | <a href="#">Art - 1st Grade-Art</a> |  | 0 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-Science</a> |  | 1 | <input checked="" type="checkbox"/> | <a href="#">1st Grade - Baker-History</a> |  | 1 | <b>School Attendance</b> |  |  |  | <b>YTD Absences</b> |  | <b>YTD Tardies</b> |  | 5 |  | 4 |  | <b>Behavior</b> |  |  |  | <b>Unit Type</b> |  | <b>Total</b> |  | Demerit |  | 7 |  |
| Andrew   |   | Brison             | Michelle            |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>Class Activity</b>  |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
|  |   | <b>Average</b>     | <b>Announcement</b> |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Mathematics</a> |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Spelling</a>    |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Computers</a>   |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Handwriting</a> |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Bible</a>       |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
|  | <a href="#">Art - 1st Grade-Art</a>           |                    | 0                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-Science</a>     |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <input checked="" type="checkbox"/>  | <a href="#">1st Grade - Baker-History</a>     |                    | 1                   |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>School Attendance</b>   |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>YTD Absences</b>  |   | <b>YTD Tardies</b> |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| 5  |   | 4                  |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>Behavior</b>  |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>Unit Type</b>   |   | <b>Total</b>       |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Demerit  |   | 7                  |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <table border="1"> <thead> <tr> <th colspan="2">Family Balances</th> </tr> </thead> <tbody> <tr> <td><b>Amount due</b></td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Andrew</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Brison</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Michelle</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td><b>Lunch Balance</b></td> <td style="text-align: right;">(\$6.00) available for lunch</td> </tr> </tbody> </table> |   |                    |                     | Family Balances  |            | <b>Amount due</b> | \$0.00   | Andrew   | \$0.00  | Brison     | \$0.00 | Michelle | \$0.00 | <b>Lunch Balance</b> | (\$6.00) available for lunch | <a href="#">My Statement</a><br><a href="#">Manage Scheduled Payments</a> |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Family Balances  |   |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>Amount due</b>  | \$0.00  |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Andrew   | \$0.00  |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Brison   | \$0.00  |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| Michelle   | \$0.00  |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| <b>Lunch Balance</b>   | (\$6.00) available for lunch                  |                    |                     |  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |
| E-mail questions about your balance - <a href="#">Click Here!</a>  |   |                    |                     | <input type="button" value="Make Payment"/>  |            |                   |          |          |         |            |        |          |        |                      |                              |   |  |  |  |  |  |                |                     |                                     |   |  |   |                                     |  |  |   |                                     |   |  |   |                                     |   |  |   |                                     |   |  |   |  |                                     |  |   |                                     |   |  |   |                                     |   |  |   |                          |  |  |  |                     |  |                    |  |   |  |   |  |                 |  |  |  |                  |  |              |  |         |  |   |  |



Otherwise, you can click the **Reports** tab and select **Billing Report** to view the credit balance:

| Overview My Profile Homework Academics Attendance Behavior Schedule Calendar <b>Reports</b> Enrollment Lunch |            |                  |                   |          |         |   |
|--|------------|------------------|-------------------|----------|---------|---|
| <b>Billing</b>   |            |                  |                   |          |         |   |
|  |            |                  |                   |          |         | Date of Last Upload: Monday, August 22, 2016  |
| <b>Mr. and Mrs. Theodore Banning</b>   |            |                  |                   |          |         | <b>Amount Due: \$0.00</b><br><b>Unapplied Credit: \$167.66</b><br><b>Family Balance: (\$167.66)</b> |
| <b>Adams, Andrew Jonathan (Andy)</b>   |            |                  |                   |          |         |   |
| Description  | Reference# | Transaction Type | Date Due/Received | Amount   | Balance |   |
| 1 Day tuition  | 10511      | Invoice          | 05/09/2016        | \$64.00  | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$64.00  |         |   |
| 1 Day tuition  | 10518      | Invoice          | 05/10/2016        | \$64.00  | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$64.00  |         |   |
| Activity Fee   | 10638      | Invoice          | 05/10/2016        | \$25.00  | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$25.00  |         |   |
| Afterschool 1 Day  | 10655      | Invoice          | 05/10/2016        | \$110.00 | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$110.00 |         |   |
| Registration   | 10787      | Invoice          | 05/10/2016        | \$100.00 | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$100.00 |         |   |
| REGISTRATION   | 10910      | Invoice          | 05/10/2016        | \$350.00 | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$350.00 |         |   |
| Infant Tuition - St. Luke's  | 10930      | Invoice          | 05/10/2016        | \$220.00 | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$220.00 |         |   |
| Supply Fee   | 11064      | Invoice          | 05/10/2016        | \$50.00  | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$50.00  |         |   |
| Tuition Full Amount  | 11092      | Invoice          | 05/10/2016        | \$500.00 | \$0.00  |   |
| test   |            | Check            | 07/26/2016        | \$500.00 |         |   |

## Set Up Optional Uploads

Selection of these items adds new elements to the HeadMaster Online screens. The new menu items, tabs, and panes will be available to parents and students when they log on to HeadMaster Online.

1. In HeadMaster, on the Home screen, click **Options**.
2. Click **HMOnline**.
3. Make your selections under Upload Options. Use the descriptions below for reference.
  - a. Upload Class Attendance - The next time you upload to HeadMaster Online, an Attendance > Class Attendance menu item will become available. Attendance information will also be added to the main dashboard in a new pane.
  - b. Upload School Attendance - The next time you upload to HeadMaster Online, an Attendance > School Attendance menu item will become available. Attendance information will also be added to the main dashboard in a new pane.
  - c. Upload Behavior -The next time you upload to HeadMaster Online, a Behavior menu item will become available. Behavior information will also be added to the main dashboard in a new pane.
  - d. Upload Calendar - The next time you upload to HeadMaster Online, the calendar will become available.
  - e. Upload Lunch Calendar - The next time you upload to HeadMaster Online, the Lunch Calendar will become available.
  - f. Use Online Re-enrollment - The next time you upload to HeadMaster Online, a Re-enrollment tab will be available for parents to select which students will be returning for the upcoming year.
4. Click Close.

Tip: If you have HeadMaster Lunch, you can also select to Upload Lunch Calendar and/or Allow Pre-orders.

## Upload Grade, Assignments, and Financial Information to HeadMaster Online

You can upload student grades, assignments, and financial information to HeadMaster Online so that parents and students can log in and view them from home.

To upload grades, assignments, and financial information to HeadMaster Online

1. In HeadMaster, on the File menu, click **HM Online** > **Upload**. The HeadMaster Online Export window displays.
2. Click **Next**.
3. Click **Upload**.
4. Once the program uploads your files, click **OK**.

Note: You'll need to run uploads regularly in order to keep the information in HM Online updated.

## Select an Active Grading Period

You can set up HM Online so that a specific grading period uploads to HM Online and displays by default when you log in.

To select an active grading period

1. In HeadMaster, on the Home screen, click **Options**.
2. Click **HMOnline**.
3. Under Active Period, select the grading period from the drop-down lists.
4. Click **Close**.

## Publish Announcements

Teachers can enter and publish announcements for their classes, and administrators can publish school announcements. Enter the announcements in HeadMaster, and then upload them to HeadMaster Online (the HMOOnline option in the File menu) so that parents and students can view them the next time they log in.

1. In HeadMaster, on the Home screen, click **Announcements**.
2. On the toolbar, click **New**. The Announcement dialog box displays.
3. Enter the Title, such as "Candy Sales End Tomorrow!"
4. Enter a Publish Date. This is the first day that you want the announcement to be available online.
5. Enter an Expiration Date. This is the last day you want the announcement to be available online.
6. If it's applicable, select a **Class**. For example, if the announcement should appear for the whole school, leave the default <None>. If the announcement should be limited to a single grade or class, select the appropriate grade or class from the list.
7. If there's a website to refer a parent to for more announcement details, enter the full address in the Web Link field.
8. Click **OK**.

## Publish Events

Publish events online using the Events feature. You can group events by categories so that students and parents can filter events on the calendar and view what is of interest to them. Prior to adding events, you must set up Event Categories in Define List. Once these categories are set up, enter events and publish online.

To add a new event category

1. In HeadMaster, on the Home screen, click **Define List**.
2. In the Available Fields list, expand Events, and click **Categories**.
3. Click **Add**. The New Event Category dialog box displays.
4. Enter the category name, such as Athletics, Fund raisers, Lower School, etc.
5. Click **OK**.
6. Repeat steps 3 through 5 to add categories.
7. Click **OK**. You're now ready to add events.

To add a new event

1. In HeadMaster, on the Home screen, click **Events**.
2. On the toolbar, click **New**. The Add Event dialog box displays.
3. Enter the general information about the event and the primary contact information.
4. Click **OK**.

The next time you publish to HeadMaster Online, events with dates between the current date and 14 days out will be visible to students and parents.

## View Administrative Reports

There are three reports that Administrative staff can view: System Log, Upload Log, and Online Payments. To view administrative reports, in HeadMaster Online, click **Reports**. Select the report you want to view.

### Additional Field Information

#### **System Log**

View a list of all log-in occurrences within your HeadMaster Online version. You have options to filter the list according to individual user names and whether the log in attempts were successful or not. Any time you change the filtering options, click **Go** to refresh the list. Click **Clear** to delete the list entries.

#### **Upload Log**

View the dates and times that the administrator uploaded a data set and whether each upload was successful or not. Click **Clear** to delete the list entries.

#### **Online Payments**

View a list of all online payment transactions. You have options to filter the list according to payment period dates and transaction types. Any time you change the filtering options, click **Go** to refresh the list. Click **Export** to open or save the list in Excel® (.xls) format.

## Select a Dataset for Automatic Upload to HeadMaster Online

You can schedule an automatic upload of a data set to HeadMaster Online. However, you must select which data set you want to upload from within HeadMaster.

1. In HeadMaster, on the Home screen, click **Options**.
2. Click **Scheduled Tasks**.
3. In the drop-down list, select the data set you want to upload.
4. To save, click **Close**.



## Manage HeadMaster Online (HMOL) Change Requests

You can use the HMOL Change Request Manager to accept or decline changes made online to information on individual's accounts. Individuals can update their names, titles, phone numbers, mailing addresses, and email addresses. Parents can update their marital status, company, and job title. A student's emergency contacts, and pickup information can be updated, as well.

We recommend that you check this frequently to keep your records up to date.

1. In HeadMaster, on the File menu, click **HM Online > Manage Change Request**.
2. Select an individual under **Pending Request** and note the changes they have requested under **Changes**.
3. Select the corresponding tab(s) at the bottom of the screen to view the requested changes.
4. If you want to decline the change, clear the **Accept** check box.
5. Click **Post**.

## Getting Started with Online Payments

Offering online payment options for your customers makes payment transactions more convenient, streamlines your receivables, and provides additional convenience for parents/guardians to make payments through the [HeadMaster Mobile App](#). We partner with Vanco Payment Solutions to process the online transactions. To start using online payments, you must apply for a merchant account with Vanco Payment Solutions.

You can apply for a Vanco account by doing one of the following:

- Go to [www.acstechnologies.com/vanco](http://www.acstechnologies.com/vanco)
- Log in to HM Online as an administrator

If you log in to HM Online as an administrator:

1. Go to **Options > Online Payment Setup**.
2. Enter your first and last name in Step 1.
3. Complete the application in Step 2.

Note: To apply for your merchant account, you'll need the following:

- Voided check
- Copy of the first page of your organization's bank statement
- Federal Tax ID Number
- Legal name as it appears on current IRS records for your organization

## Importing online payments

If you have both HeadMaster and ACS, you can import your online payments into HeadMaster and ACS Accounts Receivable.

Import Online Payments

Once you [set up online payments](#), you'll be able to import the payments into HeadMaster. When you import the payments into HeadMaster, each payment will be applied to the oldest invoice.

To import online payments into HeadMaster

1. On the File menu, select **HM Online**.
2. Select **Import Payments**.
3. Select the payments you want to import.
4. Click **Post Selected**.

This imports all of the online payments to the family records.

## Importing HeadMaster Online Payments into Accounts Receivable


If you use HeadMaster Online, you can use the **Import Payments** option to import those payments into Accounts Receivable.

When importing online payments from HeadMaster, the default Payment Fee type is Miscellaneous, but you can select any type of Payment Fee to assign to the payments you are going to import. The payments that you import will apply to the oldest unpaid invoices first. The name, date, and amount of each transaction will display, as well as the total amount selected for import.

All records from the HeadMaster Online Import will import as online payments, but you still need to post them. You can edit the entries before posting them if you need to make changes.

Note: HeadMaster Lunch deposits do not get posted in A/R. You will need to import those payments into HeadMaster on a regular basis.

To import Payments into Accounts Receivable from HeadMaster Online Import

1. Under Manage Records, click the Transactions tab.
2. In the drop-down list, select **Accounts Receivable Payments** and click **Go** .
3. Click **Add/Edit Payments**, then **Import Payments**.
4. Click **HeadMaster Online Import**.
5. Select the Payment Fee type you want to import and select **the Posting Period**.
6. Select the transactions you want to import, then click **Import**.

## **Online payments for parents**

Parents can make their online payments via HeadMaster Online or HeadMaster Mobile. Check out our Headmaster Guide for Parents and Students to learn more about:

- Making Online Payments
- Installing Headmaster Mobile
- Making Online Payments with HeadMaster Mobile

## Setting Up Online Payments

Your organization must have a merchant account with Vanco Payment Solutions in order to set up online payments.

To help ensure the security of customer financial information, only Administrative users can set up online payments.

In order for the parent/guardian of a student to make online payments, they must be in the student's primary family and the student record must be set to Publish Online.

To set up online payments

1. Log into HeadMaster Online as an administrator.
2. Navigate to **Options > Online Payments Setup**.
3. Select the types of payments you want to accept: Family payments, lunch payments, or both.
4. Select the forms of payments you want to accept: Credit card, electronic check, or both.
5. Select your deposit account.
6. Enter the person in your organization who parents can contact about online payment questions. Be sure to include the contact email address.
7. Edit any of the email templates you want:
  - a. **Payments Processed** – sent when an online payment has been processed.
  - b. **Recurring Payments Setup** – sent when a parent sets up a recurring payment.
  - c. **Expired Credit Card** – sent when a credit card on file has expired.
  - d. **Expiring Credit Card** – sent when a credit card on file is expiring soon.
  - e. **Deleted Payment** – sent when a parent deletes a payment.
  - f. **Payment Processing Error** – sent when there is an error processing the online payment.
8. Enter the *reply to* email address for the automated emails, and the signature.
9. Click **Save**.

Your ability to accept online payments is now set up. Parents can begin making one-time payments to your organization, or they can set up recurring payments.

## Online Payments Administration

There are a couple of locations within HeadMaster Online from which you'll handle online payment administration:

1. Click **Options > Online Payments Setup**. You completed this during initial setup, and now you can edit any of the fields anytime as needed.
2. When your done editing, click **Save**.
3. Click the **Reports** tab to view administrative reports. There are several reports that you may find useful:
  - a. **Online Payments** – Displays all online payments given for a selected date range. It lists who made the payment, payment date, payment type, receipt number, and amount paid.
  - b. **Bank Deposit Report** – Displays all deposits in your bank account. It lists the Batch ID, deposit date, batch type, number of transactions, and deposit total.
  - c. **Scheduled Payments Report** – Displays all recurring payments that have been scheduled.  
**Deleted Payments Report** – Displays all online payments that have been deleted.

In order for the parent/guardian of a student to make online payments, they must be in the student's primary family and the student record must be set to Publish Online.

There's not much to administering your online payments because the process is efficient for you and your online payment customers.

### Useful Information: Reasons why a transaction fails:

- Unprocessed recurring payments are placed on hold, and parents are notified by email. From this email, parents can sign into HeadMaster Online and fix the payment method.
- Banks may or may not notify parents about any returns. Vanco will always notify the school but never email parents directly. It's up to the school to decide how to communicate this.

## Implement New School Year Procedures for HeadMaster Online

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.

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

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



## Set up the School Information

The first procedure is setting up your term description.

1. In HeadMaster, 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. In HeadMaster, 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**.

## 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.

1. In HeadMaster, 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**.
6. In HeadMaster, on the Home screen, click **Prospective Students**.
7. Select multiple students while pressing **Shift** or **Ctrl** on your keyboard.
8. On the icon toolbar, click **Actions**.
9. Click **Enroll**.
10. Click **OK**.

## Enter New Students

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

1. In HeadMaster, 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.

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

Select individuals for mass change

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

1. In HeadMaster, on the toolbar, click **Tools** > **School Calendar**.
2. Enter the **Start Date**.
3. Enter the **End Date**.
4. Select the **Type**.
5. Select the days the school meets.
6. Click **OK**.
7. In HeadMaster, on the toolbar, click **Tools** > **School Calendar**.
8. On the calendar, right-click a date.
9. Select the calendar option that you want. (To add more items to the calendar, repeat steps 3-4) 4. To save the calendar, click **OK**.
10. In HeadMaster, on the toolbar, click **Tools** > **School Calendar**.
11. 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. In HeadMaster, on the Home screen, click **Tools > School Calendar**.
2. Click **Reset Lesson Plans**.
3. Enter the date for the first day that the lesson plans begin.
4. Click **Run**.
5. After the lesson plans have been rescheduled, click **OK**.
6. 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 enter a teacher record

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

To enter a staff record

1. In HeadMaster, on the Home screen, click **Staff**.
2. Click **New**.
3. Enter personal information on each tab.
4. To save the staff 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.

To set up the lunch calendar

1. In HeadMaster, 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**.

To copy/paste the lunch calendar

1. In HeadMaster, 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**.

To delete the lunch calendar

1. In HeadMaster, 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

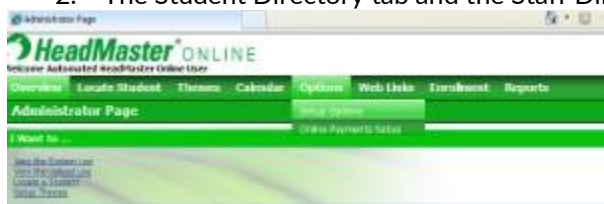
Your tuition and registration may increase each year. However, you do not need to enter new billing codes. You can simply edit the existing billing codes with the new price.

1. In HeadMaster, 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**.

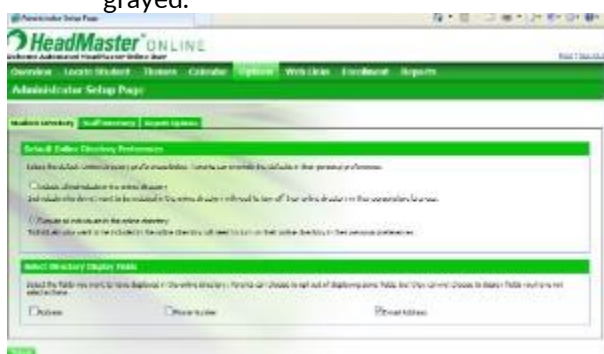
## Select Setup Options

As an administrator, you have rights to set preferences in HeadMaster Online regarding the Student Directory, Staff Directory, and Report Options.

1. In HeadMaster Online, click **Options > Setup Options**.
2. The Student Directory tab and the Staff Directory tab both contain the same options.



3. As the administrator, you set the options, but the parents/staff can override your selections by setting their own preferences. The only exception is that parents/staff cannot select to display a field that you don't select in the Select Directory Display Fields section. In their preferences, such a field option will display grayed.



4. The third tab in the window is Report Options where you can select the student reports that you want give parents/staff access to.
5. When you're finished with your selections, click **Save**.

## Change Your Password and Learn More About HeadMaster Online Password Security

For the sake of protecting your data, we recommend that you change your password often.

1. In HeadMaster Online, click **Preferences**.
2. Click the **Change Password** tab.
3. Create your password and click **Submit**.

Useful Information: Changing the HeadMaster Online password is available for parents and teachers. This option isn't available to administrators, staff, and students.

Creating a strong password protects the security of your data, parents, teachers, staff, and students who use HeadMaster Online.

As parents, students, teachers, and staff create a password, it should:

- Contain two or more numbers and both lower- and upper-case characters
- Be over 8 characters long
- Not contain your username or email or include any of the following characters: < & > \ / % or space.

As an administrator, ensure that you have a valid email address on record for your parents, teachers, staff, and students. That way, they'll receive an email notification any time their password is changed.

Useful Information: If a student doesn't have a personal email address, the email address of their primary parent will be used – specifically the email address of the parent entered first in the system.

After the upload to HeadMaster Online from HeadMaster Desktop, the new passwords are no longer visible within the Web Logon List report in HeadMaster Desktop. The entries in the Password column of the report will display the statement "Password changed by User." Therefore, no user password information is displayed anywhere in the program.

As an additional security measure, if a user forgets their password and selects the "Forgot your password?" option, the system emails a hyperlink for them to click to reset their password instead of emailing it.



## Schedule HeadMaster Online Uploads in OnDemand

You can use OnDemand to schedule tasks in HeadMaster Online to run when you're busy working on other projects, or when your staff is the least likely to be working in the system. This can be particularly helpful for uploading assignments and homework to HeadMaster Online. However, only one task may be added per hour. For example, if you schedule an assignment upload at 3 p.m., the next task cannot be scheduled to begin until 4 p.m.



To schedule tasks

1. In HeadMaster, select **Tools > Options > Scheduled Tasks**.
2. Select the data set you want to schedule for uploading.
3. On the OnDemand overlay, select **Schedule Tasks**.
4. Click **Add** to begin adding a task for a specific time.
5. Select the task you want to run, followed by the time and dates you want the task to run.
6. **Optional:** Click **Adjust** to set your local time. Click **Close**.
7. Click **OK**.
8. Click **Yes**. Click the **Task Log** tab to view previously scheduled tasks.
9. Click **Close**.

Note:

- If you plan to make automated upload into a scheduled task, we recommend that you set your automated upload settings first. Navigate to **Tools > Options > Scheduled Tasks**. In the drop-down menu, select a data set. Then, select if you want to import lunch preorders.
- To add more than one scheduled task per day, you must create a separate task using the new time.

To edit a task

1. Highlight the task you want to edit.
2. Click **Edit**.
3. Make changes to the time and dates, as needed.
4. Click **OK**.

To delete a task

1. Highlight the task you want to delete.
2. Click **Delete**.

## Set a Message for Students on Administrative Hold

Students who are flagged for administrative hold aren't allowed to view some academic information in HeadMaster Online, such as report cards. Their parents can't view it either.

You can set a message to display whenever they try to view academic information. Use the default wording in the program or customize the message.

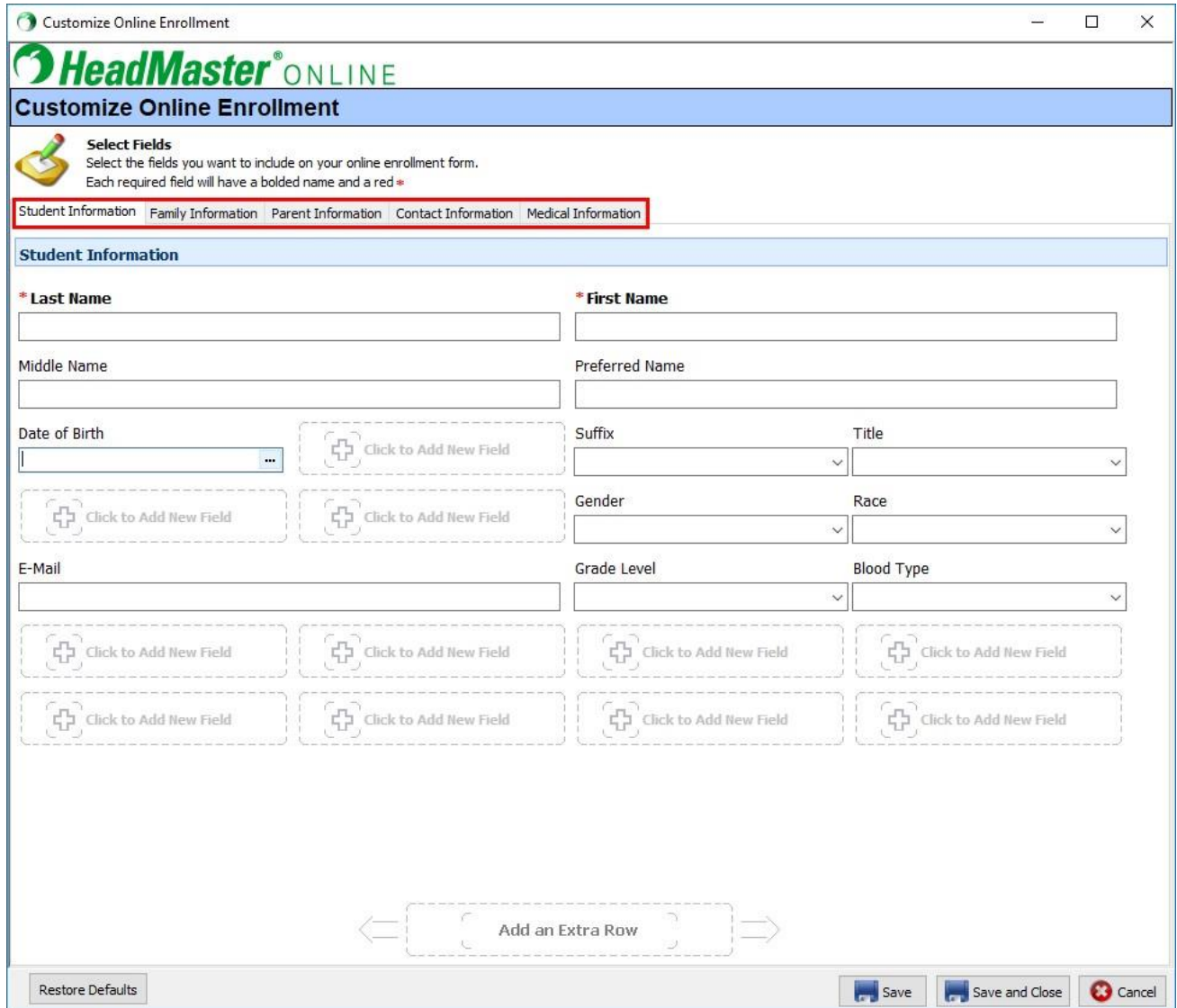
To set a message for students on administrative hold

1. In HeadMaster, on the Home screen, click **Options**.
2. Click **HMOnline**.
3. In the Administrative Hold section, enter a message.
4. Click **Close**.

## The Customize Online Enrollment Window


To customize your school's online enrollment form: In HeadMaster, on the File menu, click **HM Online > Customize Online Enrollment**.

The Customize Online Enrollment window contains five tabs, each containing different information. You can create new fields as well as edit current fields on each tab.




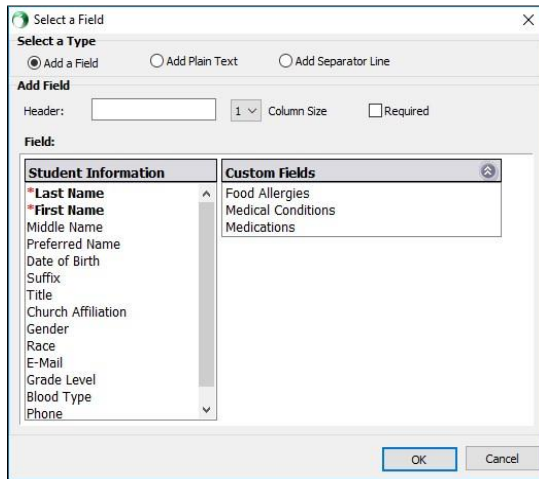
The screenshot shows a window titled "Customize Online Enrollment" with the HeadMaster ONLINE logo. The window has a blue header bar with the title "Customize Online Enrollment". Below the header, there is a "Select Fields" section with a pencil icon and a brief instruction: "Select the fields you want to include on your online enrollment form. Each required field will have a bolded name and a red \*". Below this, there are five tabs: "Student Information", "Family Information", "Parent Information", "Contact Information", and "Medical Information". The "Student Information" tab is selected and highlighted in blue. The main content area of the "Student Information" tab contains several input fields and dropdown menus. The fields are: "Last Name" (required, bolded), "First Name" (required, bolded), "Middle Name", "Preferred Name", "Date of Birth" (calendar icon), "Suffix" (dropdown), "Title" (dropdown), "Gender" (dropdown), "Race" (dropdown), "E-Mail", "Grade Level" (dropdown), and "Blood Type" (dropdown). There are several "Click to Add New Field" buttons (dashed boxes with a plus sign) scattered throughout the form. At the bottom of the form, there is a large "Add an Extra Row" button with left and right arrows. The bottom of the window has a footer bar with buttons for "Restore Defaults", "Save", "Save and Close", and "Cancel".

To add a row

1. To add an extra row of four more fields in the Customize Online Enrollment window, click  .
2. To undo all your changes in the Customize Online Enrollment window, click **Restore Defaults**.



To add new fields

1. Click  .
2. The Select a Field dialog box displays so you can enter information for your new field. See below.





3. Notice that the Last Name and First Name field names have red asterisks. That's because they're required fields by default, and their status cannot be changed.
4. When you're done, click **OK > Save and Close**.

To edit current fields

1. Click on the field:  .
2. The selected field displays with a red box around it.
3. To edit the field, click the Edit Field icon  . The Select a Field dialog box will display exactly the same as when you're creating a new field.
4. In the Select a Field dialog box, edit the field information. When you're done, click **OK > Save and Close**.

To delete current fields

1. Click on the field: 
2. The selected field displays with a red box around it.
3. To delete the field, click the Delete icon .

Note: To move a field in the Customize Online Enrollment window, you must delete it and then add it as a new field wherever you want it. This is because the window has no drag and drop functionality.

Be sure to run an upload to HM Online so that your online enrollment form gets updated with your saved changes.

#### Add a Field Dialog Box Information

##### Select a Type

**Add a Field** – Adds a field in the form of a box that parents can enter information into.

**Add Plain Text** – Adds a field in the form of text, so the field receives no input.

**Add Separator Line** – Adds a line across the entire width of the form.

##### Add Field

**Header** – The name of the field as it'll display on your online enrollment form only.

**Column Size** – The design of the form divides it into four equal columns. So, you have four different column sizes to choose from.

**Required** – Select if you want the field to be required. Check boxes cannot be required fields.

##### Field

**(Tab name) Information** – This list will have the same name as the tab you're working on. For example, it'll be titled *Student Information* if you're on the Student Information tab.

It contains a list of the information fields on each tab. Select a field that you want to add to your enrollment form. You can use each field only once.

**Custom Fields** – Contains a list of your current [custom fields](#) that you have defined for students and prospective students. Select a field that you want to add. You can use each field only once.

## **Allow Other Staff to Customize Your Online Enrollment Form**

Administrators have permission to customize the online registration form by default. But, an administrator can assign the permission to other staff (either as individuals or a group) using the **Customize Online Registration** security bit.

## Manage New Student Requests

As parents fill out your school's online enrollment form for their kids, you can pull that information down to HeadMaster:

1. On the File menu, click **File > HM Online > New Student Requests**. The New Student Requests window displays.
2. Click **Post**, and a record will be created for each student in the Prospective Students section.