HeadMaster Individual Records

2022

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View Toolbar Descriptions

Each of the individual record windows display a toolbar across the top.

Toolbar Buttons	Function
	Click to add a new record.
	Click to edit a record.
	Click to delete a record.
	Click to display the Actions menu.
	Click to preview the List report before printing.
	Click to print the List report. This report contains the sorted or filtered records and their customized fields.
	Click to save the List report as an extract file. You can save the file as either a webpage (.htm, .html), text file (.txt), or comma delimited file (.csv).
	Click to view the picture associated with a record.
	Click to send an email to the individual. This option opens your email program and enters the individual's primary email address in the To field.
	Click to filter by the selected field.
	Click to filter by multiple selected fields.
	Click to remove or clear the filter from the List window.
	Click to save the current view of the List window.
	Click to open a saved view of the List window.
	Click to display the personal information for a selected record. Click again to return the display to normal.
	Click to update or refresh the current window.
	Displays the number of records in the List window.

View the Shortcut Menu

In any of the List windows, select a record and right-click to view a shortcut menu. The action you select next will be performed for the selected record.

Useful Information: Most actions on the shortcut menu are also available on the toolbar, except for Behavior and Customize.

Preview and Print an Individual's Schedule

You can preview an individual's schedule as well as customize the preview display.

1. On the Home screen, click **Students** or **Teachers**.
2. Double-click a name.
3. Click the **Schedule** tab.
4. Select a schedule and click **Preview**.
5. To close the preview window, click **Close**.

You can customize the schedule preview so that it displays a variety of options. Additionally, you can select the start and end time that displays on the schedule.

1. While previewing the schedule, click **Options**. The Options window displays.
2. Select a column option.
3. Enter a start and end time.
4. Click **Close**. The schedule preview will update.
5. On the Home screen, click **Students** or **Teachers**.
6. Double-click a name.
7. Click the **Schedule** tab.
8. Click **Print**. The Print Preview window displays.
9. Click **Print** icon.

Log Communication in an Individual's Record

The Communication tab within a record displays a log of all printed or emailed correspondence to an individual. Printed letters or emails are only recorded if the Log Correspondence check box is selected in **Options** > **Settings**.

You cannot edit the log; however, you can add notes.

Once the Log Correspondence option is enabled, the next time you click the email button, the print button, or the print button on the preview screen, a log entry window will open where you can enter information that will display on the Communications tab.

> Useful Information: The Log Correspondence option only applies to letters and emails produced from the Correspondence window.

To log notes

1. Within an individual's record, click the **Communication** tab.
2. Select a log entry.
3. Click in the **Log Notes** box.
4. Enter notes and click **OK**.

Enter Custom Information in an Individual's Record

You can enter custom information and notes for individuals. However, you must first define the custom fields that you want to track for each individual type in **Options** > **Custom**.

After you define custom fields, you can view, enter, and edit information on the Custom tab in the individual's record.

1. On the Home screen, click **Students**, **Prospective**, **Alumni**, **Parents**, **Staff**, or **Teachers**.
2. Double-click a name.
3. Click the **Custom** tab.
4. Click in a field to enter or edit the custom information.
5. To delete custom data, click in the field and press the **Delete** key on your keyboard.
6. Click **OK**.

Update Family Information in an Individual's Record

Add a Family to an Individual's Record

Families in HeadMaster function to keep individuals grouped appropriately. Individuals who are grouped into the same family share family names, family addresses, family phone numbers, emergency and medical contacts, and pickup information. Grouping individuals by families keeps you from entering the same information repeatedly and creating duplicate records.

You can add or edit family information within an individual's record on the Family tab.

The Family tab displays the family associated with the individual, the members of the family, and a list of the family's phone numbers.

Useful Information: If there is more than one family associated with the individual, one family must be marked as the primary family.

Note: Changes to the primary address and phone number should be made in the family record and not the individual record.

To add family information

1. On the Home screen, click **Students, Prospective Students**, **Other People**, or **Parents**.
2. Double-click on an individual's name.
3. Click the **Family** tab.
4. Click **Add**. The Family Form window displays.
5. Enter the family information on each of the tabs and click **OK**.

To set a family member as primary

1. On the Home screen, click **Students**, **Prospective Students**, **Other People**, or **Parents**.
2. Double-click on an individual's name.
3. Click the **Family** tab.
4. Select the family name.
5. Click **Set as Primary**.

Select an Existing Family for an Individual's Record

You can select a family who has already been entered into HeadMaster for a student, prospective, parent, or other. For example, if Karen Jones is entering kindergarten and her two older sisters have attended your school for years, their family information is already entered into HeadMaster. You can select Karen's family for her from a list of existing families.

1. On the Home screen, click **Students**, **Prospective Students**, **Other People**, or **Parents**.
2. Double-click on an individual's name.
3. Click the **Family** tab.
4. Click **Select**.
5. Click a family name.
6. Click **OK**.

Remove a Family from an Individual's Record

You can remove a family from the records of students, prospective, other people, or parents.

1. On the Home screen, click **Students**, **Prospective**, **Other People**, or **Parents**.
2. Double-click on an individual's name.
3. Click the **Family** tab.
4. Select a family, then click **Remove**.

Track Activities

Activities are categories that are user-definable and specific to either a student, parent, teacher, or class. HeadMaster comes with some of the lists predefined, but you can define the lists of activities that your students, parents, teachers, and classes participate in.

Defined activities display on the Activities tabs for students, parents, teachers, and classes. Each type of individual or group has its own activity list available. For example, the student activity list is different from the teacher activity list which is different from the parent activity list. Classes also have their own activities.

> Useful Information: You can add multiple individuals to an activity using the Manage Activities feature.

Add individuals to an activity

1. On the Home screen, click **Students**, **Parents**, **Teachers**, or **Classes**.
2. Double-click a list entry.
3. Click the **Activities** tab.
4. Click **Add**. The Enter Activity Information dialog box displays.
5. Select a description and enter the dates.
6. Click **OK** > **OK**.
7. On the Home screen, click **Students**, **Parents**, or **Teachers**.
8. Double-click a list entry.
9. Click the **Activities** tab.
10. Select an activity and click **Delete**.

Set a Primary Address

The first address entered into HeadMaster for an individual is designated as the primary address. Although you can have only one primary address for an individual, you can select which address should be the primary address.

The address that's set as the primary address becomes the default mailing address and prints on most reports. It's also the address that's used on the mailing label for the individual or family.

1. On the Home screen, click **Students**, **Prospective**, **Parents**, **Staff**, **Teachers**, or **Other People**.
2. Double-click on an individual’s name.
3. Click the **Address** tab.
4. Click **Select**.
5. Click an address in the list and click **OK**.

Manage Prospective Students Records

Print the HeadMaster Enrollment Form

You can print blank enrollment forms to use when entering prospective students. Once the parent completes this form, you can follow the form to enter the student's information into HeadMaster.

1. On the Home screen, click **Reports**.
2. In the Report List, double-click **Miscellaneous**.
3. Double-click **Enrollment Form**.
4. To print, click the **Printer** icon.

Add a Prospective Student

Prospective students are students whose parents have submitted an application to your school, but who may not have been admitted either because more information is needed or because there is currently no vacancy in the appropriate class. HeadMaster makes it easy to preliminarily enroll students so that you can easily access their contact or other personal information.

You can use the prospective category to collect and store as much information about the student as you need. When the student officially enrolls at your school, you can convert the prospective record to a student record. Pre-enrollment has almost all of the same fields and functions as the Student windows.

> Tip: We recommend that you use the Student Assistant when you add a new prospective student, and you're entering their information from a HeadMaster Enrollment Form.

1. On the Home screen, click **Prospective Students**.
2. Click **New**.

> Useful Information: If the Student Assistant doesn't display, on the Home screen, click **Options** > **Settings**. Select the **Use Student Assistant when adding new students** check box.

1. Enter the student's information, then click **Next** until you finish entering the student's information.
2. Click **Finish**.

Add Prospective Students from Existing Records

You can create another prospective student record or a parent record using the existing information from a related prospective student's record, such as a sibling or children who live in the same household.

1. On the Home screen, click **Prospective Students**.
2. In the Prospective List window, click the student's name that you want to add a record from.
3. On the shortcut bar, click **Actions** > **Related Item**.
4. Select **Add Sibling** or **Add Parent**.
5. The new record is created with the family, address, phone, pickup, and emergency information completed. Click each tab in the prospective record to enter additional information.
6. Click **OK**.

Enroll a Prospective Student

Not every student who is prospective in your school becomes a student. However, for those who do, you can enroll them by transferring their prospective records to student records.

1. On the Home screen, click **Prospective Students**.
2. In the Prospective List window, click the student's name that you want to enroll.
3. On the shortcut bar, click **Actions** > **Enroll**. The record is moved to the student list and no longer appears in the prospective list.
4. Alternatively, you can click **Enroll Now** on the selected Prospective Student Enrollment tab.

Useful Information: Online logins become available after the prospective student is enrolled as a student.

Track Inquiries for Prospective Students

You can create and check off a list of inquiries that should be completed for each prospective student. The lists are created in the Define List section of the program and displayed on the Enrollment tab.

1. On the Home screen, click **Define List**.
2. In the Available Fields pane, expand **Admissions**, and click **Inquiry Tracking**.
3. Click **Add**, enter the new item, and click **OK**. The new item will be available as part of the checklist on the Enrollment tab within the prospective student records.
4. On the Home screen, click **Prospective Students**.
5. Double-click the student's name.
6. Click the **Enrollment** tab.
7. Select the check box next to the inquiry and enter a completion date.

Delete a Prospective Student's Record

If you no longer want to keep the record of a prospective student, you can delete it as long as the student doesn't have billing activity.

1. On the Home screen, click **Prospective Students**.
2. Click the student's record that you want to delete.
3. Click **Delete**.
4. Click **Yes**.

Track Application Requirements for Prospective Students

You can create and check off a list of application tasks that should be completed for each prospective student. The lists are created in the Define List section of the program and displayed on the Enrollment tab.

Add an application requirement

1. On the Home screen, click **Define List**.
2. In the Available Fields pane, expand **Admissions** and click **Application Tracking**.
3. Click **Add**, enter the new requirement, and click **OK**. The new item will be available as part of the checklist on the Enrollment tab within the prospective student records.

Add requirements to prospective students' profiles

1. On the Home screen, click **Prospective Students**.
2. Double-click the student's name.
3. Click the **Enrollment** tab.
4. Select the check box next to the requirement and enter a completion date.

Manage Student Records

Add a New Student

One of the most important processes in HeadMaster is adding students to the database. You can save time by selecting the appropriate method for adding students to HeadMaster.
There are three ways to add a student, and selecting the best method depends upon several factors:

- **Add Student Assistant** – When you want to quickly add a number of students. While you cannot add all of the data about a student using this method, you can edit the student information at a later time.
- **Add New Student** – When you have time to be more thorough in entering student data such as billing, custom fields, immunizations, or notes.
- **Related Item** – When you're viewing another student's record or a parent's record, you can add and associate new individuals, including a student, using the **Actions** > **Related Item** menu.

To access the student list, on the Home screen, click **Students**.

> Useful Information: Prior to adding student records for the first time, remember to set student options and define student lists.

By default, the Student Assistant displays when you enter a new student in the student list. You can deactivate this option at any time.

1. On the Home screen, click **Options**.
2. Click **Settings**.
3. Clear the **Use Student Assistant when adding new students** check box.
4. On the Home screen, click **Students**.
5. Click **New**.
6. Click each tab to enter information into the appropriate fields.
7. To save the record, click **OK**.

Add Students from Existing Records

If a student is the sibling of an existing student, you can quickly add the new student while copying shared information, such as family name, family phone number, family address, emergency and medical contacts, and pickup information. Besides saving you a great deal of time entering duplicate information, it prevents you from inadvertently entering a duplicate family.

1. On the Home screen, click **Students**.
2. To select the student record, click the student's name.
3. On the toolbar, click **Actions** > **Related Item** > **Add Sibling**.
4. The new student's record will contain family, emergency, medical, and pickup information copied from the original student’s record. Enter additional information and click **OK**.

If a child’s parents have previously been entered in HeadMaster, you can quickly add a new, related student. When a student is added from the parent record, information such as the family name, family phone number, and family address are copied to the new record. Besides saving you a great deal of time entering duplicate information, it prevents you from inadvertently entering a duplicate family.

1. On the Home screen, click **Parents**.
2. To select the parent record, click the parent’s name.
3. On the toolbar, click **Actions** > **Related Item** > **Add Child**.
4. The new student's record will contain family information copied from the parent record. Enter additional information and click **OK**.

Transfer a Student

Sometimes a student needs to be transferred from one class to another. With the Transfer Student tool, you can transfer the student's grades and attendance.

1. On the Tools menu, click **Assistants** > **Transfer Student**.
2. Select a student and click **Next** after you complete each window.
3. Click **Finish**.
4. When the transfer is complete, click **OK**.
5. Click **Close**.

Useful Information: If you transfer a student from a class that either doesn’t have a grading period structure or has a structure different from the one you’re transferring the student into, you must manually enter the grades in the new class on the last window before you click **Finish**.

Set Student Options and Define Student Lists

Prior to adding new student records, you can simplify your data entry efforts by setting up student options and defining student lists.

Student Options Checklist

? Unknown Attachment	Add custom fields for information you want to track.
? Unknown Attachment	Set up the immunizations list.
? Unknown Attachment	Set up a default ZIP code as well as frequently used ZIP codes.
? Unknown Attachment	Enable the Student Assistant.
? Unknown Attachment	Set up individual lists.
? Unknown Attachment	Set up grade levels.
? Unknown Attachment	Customize grade status types.
? Unknown Attachment	Set up note categories.
? Unknown Attachment	Set up withdrawal reasons.

Set Up Student Note Categories

When you add a note to a student's record, you can optionally select a category to put the note in, such as Medical or Home. You can later use this category to filter notes in reports.

Add student note categories

1. On the Home screen, click **Define List**.
2. In the Available Fields list, click **Student** > **Notes Categories**.
3. Click **Add**.
4. Enter a description and click **OK**.

Edit student note categories

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, click **Student** > **Notes Categories**.
3. Select a note type and click **Edit**.
4. Enter a new description and click **OK**.

Delete student note categories

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, click **Student** > **Notes Categories**.
3. Select a note type and click **Delete**.
4. Click **Yes**.
5. Click **OK**.

Enable the Student Assistant

The Student Assistant is an option you can use to quickly create a new student record when you don't need all of the information entered for the record at that time. For example, you can add a student record and link it to the parent or sibling records that are already in your database. Then, you can complete adding the data to the student record at a later time.

The option is enabled by default. However, if you add a new student record and the Student Assistant window doesn't display, you can enable it.

1. On the Home screen, click **Options**.
2. Click **Settings**.
3. Select **Use Student Assistant when adding new students**.
4. Click **Close**.

> Useful Information: Once you enable the Student Assistant, there are two ways to access it.
> - On the Home screen, click **Add Student**.
> - On the Home screen, click **Students**. In the Student list window, click **New.**

Manage Student Enrollment

Use the Enrollment tab to view dates of application, approval, and withdrawal, to register students for school, or to track application and admission history.

Additional Field Information
Applied Date The date that the student’s application was submitted. **Approved Date** The date that the student’s application was approved. **New School Year** The school term for which the student registered.

Manage Grade Levels

There are default grade levels (K4 through 12) available in HeadMaster to which any of your current students can be assigned. You can use these default grade levels or change them to meet your needs.

On the Home screen, click **Define List**. In the available fields pane, click **Student** > **Grade Level**.

You can also add grade levels to the default grade level list.

1. Click **Add**.
2. In Grade Level Description, enter the name of the grade level. For example, enter **K5** for Kindergarten or **1** for Grade 1.
3. In the **Grade Level Number** drop-down list, select the traditional grade level to be used when calculating permanent records. For example, for 12th grade, select **12**. Note: For levels below first grade, select **<None>**.
4. Click **OK**.
5. When you finish entering grade levels, click **OK**.

> Useful Information: You can add a grade level named "Graduated," and promote seniors to this level so you can locate and update graduates if you don't have HeadMaster Pro.
>
> Make sure the grade levels in the list are in ascending order so at the end of the year when you run the promotion utility the students will be promoted to the correct grade. Use the Move Up and Move Down arrows to reorder grade levels.

You can edit the grade level list by adding or deleting entire grade levels, or you can edit the description and grade level number for each particular grade level within the default list.

To edit grade levels

1. Double-click the grade level you want to change.
2. Change the Grade Level Description and select the appropriate Grade Level Number.
3. When you finish editing grade levels, click **OK**.

To delete grade levels

1. Click the grade level you want to remove from the list.
2. Click **Delete** > **Yes**.
3. When you finish deleting grade levels, click **OK**.

Manage Notes in a Student's Record

You can add notes to any student's record. Notes are categorized so that they can be grouped or sorted.

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Notes** tab.
4. Click **Add**.
5. Enter a date and select a category from the Note Category drop-down list. Click **<New>** to add a category.
6. If the note should not be printed on reports, select the **Private** check box.

> Useful information: Only those who have rights to private notes can view them. Also, check In / Out Notes are entered at the bottom of the Notes tab. Any notes entered here will display when a student checks-in or out.

You can change a note, including the date, category, and note information or completely remove a note from the student record.

Add or edit a note

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Notes** tab.
4. Double-click the note you want to edit.
5. Make your changes and click **OK**.

Delete a note

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Notes** tab.
4. Click the note you want to delete and click **Delete**.
5. Click **OK**.

Customize Grade Status Types

A grade status is used to indicate on the report card that the student's grade may be incomplete, that the student withdrew, or that the student is failing the class. You can customize the default list of grade status types.

To add a grade status

1. On the Home screen, click **Define List**.
2. In the Available Fields list, click **Student** > **Grade Status**.
3. Click **Add**.
4. Enter a description. Examples of grade statuses include Withdrew, Withdrew Failing, Incomplete, or Dropped.
5. Click **OK**.

To edit a grade status

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, click **Student > Grade Status**.
3. Select a grade status and click **Edit**.
4. Enter a new description and click **OK**.

To delete a grade status

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, click **Student > Grade Status**.
3. Select a grade status and click **Delete**.
4. Click **Yes**.
5. Click **OK**.

Add or Edit Reasons for Student Withdrawal

When students leave the school, you can enter a reason and date for leaving in the Student window, on the Student tab.

To add a withdrawal reason

1. On the Home screen, click **Define List**.
2. In the Available Fields list, click **Student** > **Withdrawal Reasons**.
3. Click **Add**.
4. Enter a description and click **OK**.

To edit a withdrawal reason

1. On the Home screen, click **Define List**.
2. In the Available Fields list, click **Student** > **Withdrawal Reasons**.
3. Click the withdrawal reason you want to change.
4. Click **Edit**.
5. Enter a new description and click **OK**.

To delete a withdrawal reason

1. On the Home screen, click **Define List**.
2. In the Available Fields list, click **Student** > **Withdrawal Reasons**.
3. Click the withdrawal reason you want to remove.
4. Click **Delete** > **Yes**.
5. Click **OK**.

Access Student Behavior Records

There are two ways that you can access and manage behavior records.

First option to manage behavior records

1. On the Home screen, click **Students**.
2. In the Student List window, right-click on a student's name and select **Behavior**. Associated behavior records display.
3. Select one of the following actions:
4. To view details, double-click a record.
5. To edit an existing record, double-click the record.
6. To add a new record, click **New**.
7. To delete a record, select the record, and click **Delete** > **Yes**.
8. When finished, click **Close**.

Second option to manage behavior records

1. On the Home screen, click Behavior.
2. Locate, and click a behavior record.
3. To view details, double-click a record.

View a Student's Permanent Record

You can view a student's permanent record from the Student List window.

1. On the Home screen, click **Students**.
2. Click the record you want to view.
3. Click the **Permanent Record** icon. If the student doesn't have a permanent record, one will be created.

Make a Student an Alumnus

Making a student an alumnus doesn't change the student record. Instead, it adds an additional record so that there are two records for the individual: A student record, and an alumnus record.

1. On the Home screen, click **Students**.
2. Select a student name.
3. Click **Actions** > **Make this Student an Alumnus**.
4. Click **OK**.

Change a Student's Homeroom Teacher

You can change a single student's homeroom teacher from within their student record.

1. On the Home screen, click **Students**.
2. Double-click a student record.
3. Click the **Student** tab.
4. Click the ... button in the Homeroom Teacher field. The Select Teacher dialog box displays.
5. Select or add a new name and click **OK**.
6. Click **OK**.

You can also change a homeroom teacher assignment for multiple students at once. There are two ways you can do it.

The first way uses the Search and Replace option. This is a mass change feature that searches for a teacher's name and replaces it with another teacher's name throughout the Headmaster database. For example, use this option if a teacher resigned during the course of the school year and you need to replace the teacher's name throughout all the records in which it occurs throughout the database.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Homeroom Teacher**.
4. Select **Search and Replace**.
5. To select the teacher's name you want to change, click the **Value to Change** drop-down list.
6. Click the **New Value** drop-down list and select the new teacher's name.
7. Click **Change**.
8. Click **OK**.

The second way uses the Select Individual option. With this option, you can change a specific value for only the individuals that you select. For example, use this option if you need to move a few students out of one homeroom teacher's class into another.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Homeroom Teacher**.
4. Click **Select Individual**.
5. Click **Select**.
6. Click the student's name that you want to reassign to a new homeroom teacher and click **Add**. To select more than one student, press and hold the **Ctrl** key on your keyboard and select multiple students.
7. Click **OK**.
8. Click the **New Value** drop-down list and select the new teacher's name.
9. Click **Change**.
10. Click **OK**.

Enter and View Student Registration Information

When a student registers to attend your school, you can track their re-enrollment information.

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Enrollment** tab.
4. In the Registration section, select the **Re-enrolled** check box.
5. Enter a withdrawal date.
6. Enter a date in the New School Year field.
7. In the **Re-enrolled Grade Level** drop-down list, select the grade that the student will be in.
8. Click **OK**.

Enter and View Student Withdrawal Information

If a student moves away or leaves your school for any reason, you can enter the withdrawal reason and date in the student's record.

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Enrollment** tab.
4. Select a reason from the **Withdrawal Reason** drop-down list. Select **<New**> to add a new reason.
5. Enter a withdrawal date.
6. Click **OK**.

Retain a Student

If a student needs to be retained in their present grade, **Do Not Promote** must be selected on the individual student's record before you promote the class for the year.

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Student** tab.
4. Select the **Do Not Promote** check box.
5. Click **OK**.

View a Student's Current GPA or Grade Average

You can view a student's current grade average and current GPA.

1. On the Home screen, click **Students**.
2. Double-click a student's name, and click the **Student** tab.

Useful Information: To view or print a grade inquiry from the student, click the **Inquiry** button.

View Student Attendance Information

You can view a student's attendance information. Student attendance is generally recorded using either the Class Attendance Assistant or the School Attendance Assistant.

Note: Although you can edit attendance information on the student record, it’s not recommended if you use the School Attendance Assistant to post attendance.

To view attendance information

1. On the Home screen, click **Students**.
2. Double-click a student’s name.
3. Click the **Student** tab.
4. To view monthly attendance totals, click the **Inquiry** button. The Attendance Inquiry window displays.
5. To close the window, click **Close**.

Useful Information: The attendance summary is included on the Grade Inquiry report, which report markings made in Class Attendance.

Enter or View Student Graduation Dates

You can enter or view the student’s graduation date. On the Home screen, click **Students**. Double-click a student’s name, and click the **Enrollment** tab.

Delete a Student Record

You can delete a student as long as the student does not have billing activity.

> Note: If you delete a student, you also delete all of the information attached to them, including grades and attendance history.

1. On the Home screen, click **Students**.
2. Click the student's record that you want to delete.
3. Click **Delete**.
4. Click **Yes**.

Track Re-Enrollment Requirements for Students

You can create a list of re-enrollment tasks to be completed for each student.

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand **Admissions** and click **Re-Enrollment Tracking**.
3. Click **Add**, enter the new requirement, and click **OK**. The new item will now be available as part of the checklist on the Enrollment tab for students.
4. On the Home screen, click **Students**.
5. Double-click the student's name.
6. Click the **Enrollment** tab.
7. Select the check box next to the re-enrollment requirement and enter a completion date.

For more information on how these procedures affect the re-enrollment options that parents have in HeadMaster online, see Re-Enrolling Students in our Online Guide for Parents.

Track Application Requirements for Students

You can create a list of application tasks to be completed for each student.

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand **Admissions** and click **Application Tracking**.
3. Click **Add**, enter the new requirement, and click **OK**. The new item will now be available as part of the checklist on the Enrollment tab for students.
4. On the Home screen, click **Students**.
5. Double-click the student's name.
6. Click the **Enrollment** tab.
7. Select the check box next to the application tracking requirement and enter a completion date.

Edit a Student Schedule

You can add to or remove one or more class from a student's schedule as well as transfer a student from one class to another.

Useful Information: When you add classes, HeadMaster will display a message if the class time conflicts with another class on the student's schedule.

1. On the Home screen, click **Students**.
2. Click to select a student's name.
3. Click **Edit Student Schedule**. The Edit Schedule window displays.
4. Click the **Class Name** you want to add to the schedule. To select multiple classes, press and hold **Ctrl**.
5. Click **Add**.
6. Click **Close**.

Useful Information: In the Edit Schedule window, you can filter the All Classes list. To filter, click the criteria you want to filter for. For example, to filter for all 12th grade classes, under Grade Level, click **12** to highlight it. Then, click . To remove this filter, clic .

1. On the Home screen, click **Students**.
2. Double-click the student you want to transfer.
3. Click the **Schedule** tab.
4. Select the class you want to transfer the student out of.
5. Click **Transfer**. The Transfer window displays.
6. Select the class you want to transfer the student into.
7. Click **Next**.
8. Review and edit grades if necessary.
9. Click **Finish**. When the transfer is complete, click **OK** > **Close**.

Remove a Class from the Student Schedule

You can remove classes from a student’s schedule.

> Useful Information: When you remove classes from a student’s schedule, you also delete their grades and attendance history for the class.

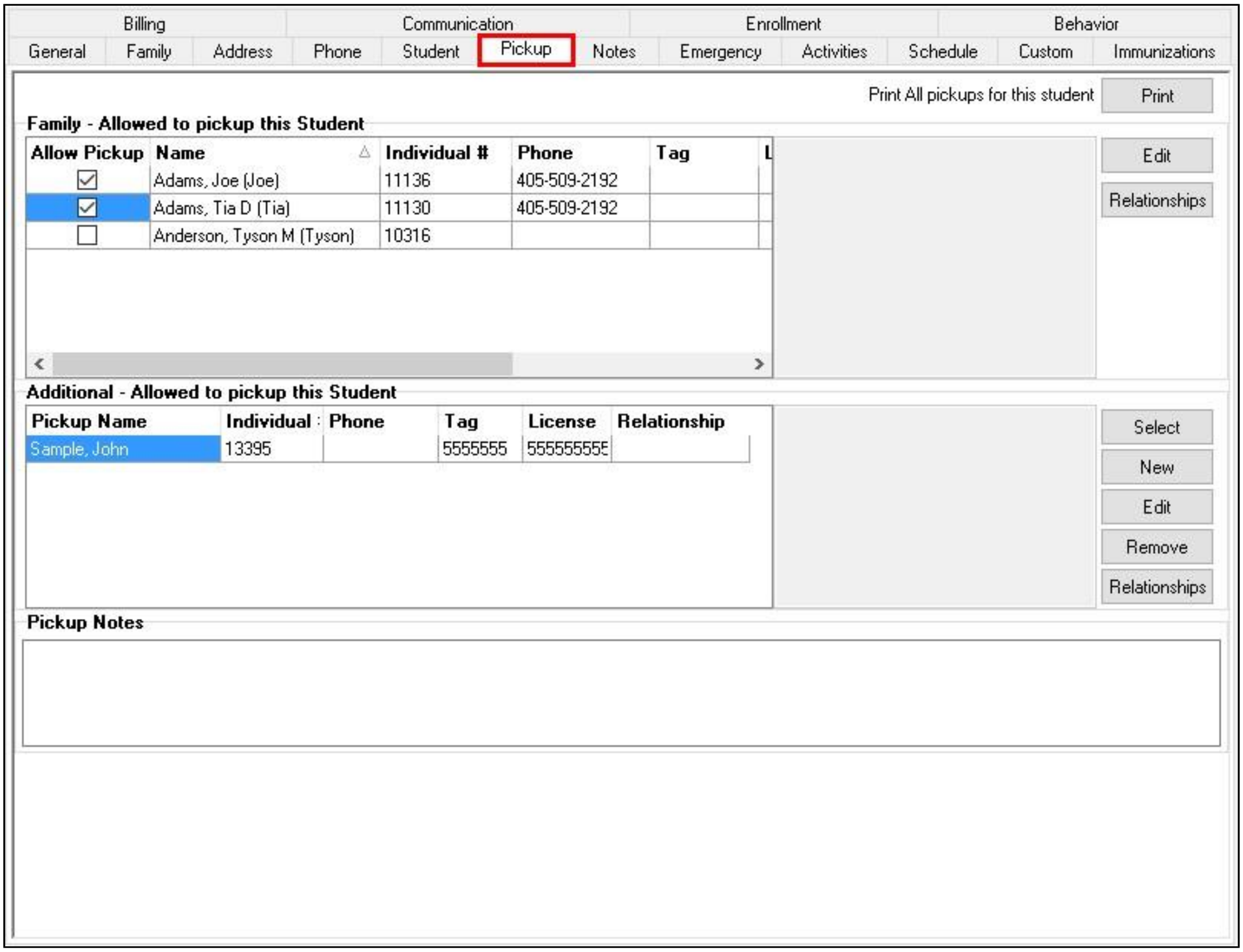
1. On the Home screen, click **Students**.
2. Double-click a student’s name.
3. Click the **Schedule** tab.
4. Select the class you want to remove.
5. Click **Remove**.
6. Click **Yes** > **OK**.
7. On the Home screen, click **Students**.
8. Double-click a student's name.
9. Click the **Schedule** tab.
10. Click **Add**.
11. Click **Remove All**.
12. Click **Yes** > **Close** > **OK**.

Set Student Pickup Details

You can enter and edit the name, phone, and vehicle information for anyone who is authorized to pick up the student.

To set student pickup details

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Pickup** tab.
4. Enter the pickup details, then click **OK**.



Additonal Field Information

Relationships – Add what type of relationship a pickup has with the student.

Select – Add a name that already exists in your database.

New – Add a name that does not already exist in your database.

Add a Former Student to the Active Student List

> Useful Information: This option is available only with HeadMaster Pro v.11.4.1.2 and above.
>
> When a student withdraws, their record is stored as a permanent record. If a student returns, you can re-activate their record.

To re-activate a student's record

1. On the Home screen, click **Permanent Records**.
2. Select the record.
3. On the toolbar, click **Actions** > **Add this record as an Active Student**. A confirmation window displays.
4. Click **Confirm**. The Student Assistant displays.
5. Add the student information and click **Next** after each window.
6. When you're finished, click **Finish**.

Manage Parent Records

Add a New Parent

Generally, you will not need to add parent records from the Parent List window. Adding new parents is usually accomplished when adding new or prospective students to the data set. However, you may occasionally need to add, edit, or remove a parent such as in the case of divorce, death, or another event.

To update family information, see Update Family Information within an Individual's Record on page 8.

1. On the Home screen, click **Parents**.
2. On the toolbar, click **New**.
3. Click each tab to enter information into the appropriate fields.
4. To save the record, click **OK**.

Add Parents from Existing Records

You can add a parent using a parent's record that was previously entered into HeadMaster.

1. On the Home screen, click **Parents**.
2. To select the parent record, click the parent’s name.
3. On the toolbar, click **Actions** > **Related Item** > **Add Spouse**.
4. The new parent's record will contain family information copied from the other parent record. Enter additional information and click **OK**.

Delete a Parent Record

When you delete a parent record, the parent information is also removed from the related student and family records.

1. On the Home screen, click **Parents**.
2. Select the record that you want to delete.
3. Click **Delete**.
4. Click **Yes**, enter a reason, and click **OK**.

Manage Family Records

Adding a Family or Secondary Family

Families function to keep individuals grouped appropriately. Individuals that are grouped into the same family share family names, family addresses, family phone numbers, emergency and medical contacts, and pickup information. Grouping individuals by families keeps you from entering the same information over and over and creating duplicate records. It also simplifies updating shared information across family records because any changes made to shared family information, such as change of address, is updated for all related family records.

The Family List window is also a useful location to view or print a billing inquiry that details all amounts a family owes.

For example, the Tisdales have five children: Skylar, Ben, Holt, David, and Hannah. When the parents enroll three of the five children, the HeadMaster Academy's administrator enters the oldest student (Skylar) in the data set. The administrator, using the Add Student Assistant, enters the parent and family information in the appropriate window. When the administrator adds the next two students (Ben and Holt) she selects the family because it already exists in the data set, thus copying the shared family, emergency, medical, and pickup information. Next year, when David enrolls in 4K, the administrator can once again select the Tisdale family and the shared information will be copied to David's student record.

Useful Information: Generally, you won't need to add new families using the family window. Adding new families or selecting existing families is accomplished when adding new students or prospective students to the data set. However, you may occasionally need to add a secondary family, as in the case of a divorce or another event.

To update family information, see also Update Family Information within an Individual's Record on page 8.

1. On the Home screen, click **Families**.
2. Click **New**.
3. Enter the Family Name. For example, enter "Tisdale, Bob and Olive."
4. If individual family members exist in the data, click **Select**. To add a new member who doesn't already exist in the data, click **New**.
5. Click the **Address** tab and enter the family address information. See Add an Address to an Existing Family Record on page 60.
6. Click the **Phone** tab and add phone information. See Add a Phone Number for a Family on page 61.
7. Click the **Notes** tab and add family notes.
8. To save the family record, click **OK**.

Add New Family Members

When you're adding or editing a family record, if members of the family don't already exist in your data, you can add new student, prospective, parent, or other people records.

1. On the Home screen, click **Families**.
2. Double-click the family record you want to add members to.
3. On the General tab, click **New**.
4. In the New Person window, click the **Individual Type** list and select the type of record you want to add.
5. Enter the information for the new person and click **OK**.
6. Repeat this procedure for each individual you want to add who doesn't already have a record in the data set.

Add an Account for a Family

> Useful Information: To display the Accounts tab in the family records, on the Home screen, click **Options** > **Settings**. Select **Enable Scanner**.

The Accounts tab displays accounts linked to the family record. There is no limit to how many accounts a family record can have.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Accounts** tab.
4. Click **Add** > **Manual**.
5. Enter the account information in the Account Number and Routing Number fields.
6. Click **OK**.

If you have the Magtek® MICRImage™ check scanner enabled, you can scan a check to enter the Account Number and Routing Number information.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Accounts** tab.
4. Click **Add** > **Scan Check**.
5. When prompted, insert the check into the scanner.
6. The information is entered into the Account Number and Routing Number fields. Click **OK**.

Split a Family Record

1. On the Home Screen, click **Families**.
2. Double-click a family name. The Family Form window displays.
3. On the General tab, select the parent name you want to remove from the family record.
4. Click **Remove**.
5. Delete the parent name from the Family Name field, and also remove the parent name from the Mailing Name field on the Address tab.
6. Click **OK**.
7. In the Family List window, click **New**. The Family Form window displays.
8. Click **Select** and select the parent that is no longer a part of the original family (Make sure you enter the other information on the tabs).
9. Click **Select**.
10. Select the child and click **OK**.
11. Close the Family grid.
12. Click **Students** on the Home screen.
13. Double-click the student name.
14. On the Family tab, select the parent who will be primary.
15. Click **Set as Primary**.
16. Click **OK**.

Deactivate a Family or Family Members

You can deactivate a family and all of the individuals in the family at one time. This is especially useful when a family moves away, and you need to deactivate all of the family members. You can also deactivate specific family members.

1. On the Home screen, click **Families**.
2. Double-click a family name.
3. Click the **Notes** tab.
4. Clear the **Active Family** check box.
5. In the **Confirm** dialog box, select any members of the family you don't want to deactivate.
6. Click **Close**.
7. Enter the **Date Deactivated**.
8. Click **OK**.

Useful Information: To deactivate a group of students, parents, teachers, or staff persons, use Mass Change.

Delete a Family

When you delete a family, they're deleted from any record they are attached to.

Useful Information: You cannot delete a family if they have billing activity. You can deactivate a family instead of deleting it. For more information, see Deactivate a Family or Family Members on page 56.

1. On the Home screen, click **Families**.
2. Select the family name you want to remove.
3. Click **Delete**.
4. When the confirmation message appears, click **OK**.

Delete an Account

If an account is no longer in use by the family, you can delete the account from their record.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Accounts** tab.
4. Select the account you want to delete.
5. Click **Delete**.

Exclude a Family from Receiving Statements

When you enter a family from any location in the program, the Receive Statement check box is automatically selected. However, you can prevent a family from receiving a copy of the statement or invoice for tuition and other fees.

1. On the Home screen, click **Families**.
2. Double-click a family name.
3. Click the **Address** tab.
4. Under Mailing Name, clear the **Receive Statement** check box.
5. Click **OK**.

Useful Information: You can also access this information from the Students, Prospective Students, or Parents record. In the individual's records, click the **Family** tab, double-click the family you want to exclude. Click the **Address** tab and clear the **Receive Statement** check box.

Add an Address to an Existing Family Record

You can enter one mailing name and address for each family, set the address type, and select to have billing statements forwarded to the family address. This address is automatically set as the primary address for all members of the family. However, you can set a different primary address on each member' s record.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Address** tab.
4. Enter the **Mailing Name**. This name prints on all correspondence sent to this address.
5. **Billing Customers Only**: If you don't want billing invoices to be sent to this address, clear the **Receive Statement** check box.
6. In the Type list, select the address type or select **New** to add a new type.
7. Enter the address information and click **OK**.

Add a Phone Number for a Family

Although you can enter more than one phone number for a family, we recommend that you limit the family record to a single phone number and store individual numbers for parents and students in the parent or student record. This simplifies finding information on family reports.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Phone** tab.
4. Click **Add**.
5. Enter the phone information and click **OK**.

Change an Address for an Existing Family

You can change an address for an existing family. Changes to the primary address should be made in the family record and not the individual record.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. Click the **Address** tab.
4. Change address information and click **OK**.

View Family Contact Information

Family address and phone information is automatically copied to each family member's record. You can enter one mailing address for each family, but you can enter as many phone numbers as needed.

1. On the Home screen, click **Families**.
2. Double-click a family's name.
3. To view the address, click the **Address** tab.
4. To view the list of phone numbers, click the **Phone** tab.
5. To close the window without saving changes, click **Cancel**.

Tip: You can quickly view contact information without opening individual family records. In the Family List window, on the toolbar, click **Show Details**. Click a family name. The contact information displays below the Family List window. Press the Up and Down arrows on your keyboard to scroll through family names. The contact details update as you move from family to family.

Remove Family Members from a Family

You can remove one or more family members from a family. To remove an entire family, see Delete a Family on page 57.

1. On the Home screen, click **Families**.
2. Double-click a family name.
3. On the General tab, select the family member’s name you want to remove.
4. Click **Remove**.
5. Repeat steps 3 and 4 for each member you want to remove.
6. Click **OK**.

Integrate HeadMaster with ACS People

You can integrate family information that exists in HeadMaster with your ACS People database. For example, you can select a family (or group of families) in your school who also attends your church, and you can send their information to ACS People. Once the connection is established, any address, phone number, or name changes you make to the family in HeadMaster will be automatically updated in ACS People.

1. On the Home screen, click **Options**.
2. Click **ACS People Integration**.
3. Select **Enable ACS People Integration**.
4. Select a data set from the **Select Dataset** drop-down list (if you have multiple ACS data sets). **NOTE:** This option is available with ACS 11.1.7.8 or higher. Only families in the currently selected data set are linked to ACS. If you change to another data set, you must re-link the families within that data set.
5. Make your selections to associate the HeadMaster fields with the equivalent ACS fields.
6. Click **OK** > **Close**.

Add family to ACS People

1. On the Home screen, click **Families**.
2. Select a family and click **Add Family to ACS People**.
3. Click **OK**.

Unlink families from ACS

1. On the Home screen, click **Families**.
2. Select a family and click **Unlink from ACS**.
3. Click **Yes**.

> Useful Information: Although family information you change in HeadMaster will take effect in ACS People, the reverse is not true.

Manage Teacher Records

Add a Teacher

There are two people categories in HeadMaster that school employees can be added to: Staff and Teachers. When you add a teacher, a staff record is automatically created. However, when you add a staff person, a teacher record is not created.

In order to keep your data organized and void of duplicate staff records, always add teachers to the Teachers List and reserve the Staff List for administrative, janitorial, cafeteria, or other employees.

If you've already entered teachers in the Staff List, see Create a Teacher or Parent Record from a Staff Record on page 74.

1. On the Home screen, click **Teachers**.
2. Click **New**.
3. Click each tab to enter information into the appropriate fields.
4. To save the record, click **OK**.

Create a Teacher Record from a Parent Record

You can create a teacher record from a parent record. This doesn't change the parent record. Instead, it adds an additional record, so there are now two records for this individual: One parent record, and one teacher record.

1. On the Home screen, click **Parents**.
2. Select an individual's record.
3. On the toolbar, click **Actions** > **Additional Type** > **Make this Parent a Teacher**.
4. Enter additional information or make changes to the record.
5. Click **OK**.

Create a Parent Record from a Teacher Record

When a teacher's child enrolls in your school or day care, you can create a parent record from the teacher's record. This doesn't change the teacher record. Instead, it adds an additional record, so there are now two records for this individual: One teacher record, and one parent record.

1. On the Home screen, click **Teachers**.
2. Click the individual's record.
3. On the toolbar, click **Actions** > **Make this Teacher a Parent**.
4. Enter additional information or make changes to the record.
5. Click **OK**.

Delete a Teacher Record

You can remove teachers from the data set. If there's a related staff record for the teacher, the staff record will also be deleted.

> Note: If you delete a teacher, they are removed the class.

To delete a teacher record

1. On the Home screen, click **Teachers**.
2. Select a teacher record.
3. Click **Delete**.
4. Click **OK**.

View and Print Teacher Schedules

Teachers are assigned to classes and class times during class setup. Once you enter schedules, you can preview or print a teacher's schedule from their record.

To make changes to a schedule, you must edit the teacher assigned to a class or the class day and time.

1. On the Home screen, click **Teachers**.
2. Double-click a teacher's name.
3. Click the **Schedule** tab.
4. Click **Preview** or **Print**.

Tip: You can print schedules for multiple teachers. In Reports, double-click **Schedules** > **Teacher Schedule**.

Set up a Teacher's Classroom Manager Login and Password

If you use Classroom Manager, you need to assign each teacher a login and password.

1. On the Home screen, click **Teachers**.
2. Double-click a teacher's record.
3. Click the **Teacher** tab.
4. Under Classroom Manager Security, enter a username and password.
5. Click **OK**.

View a Teacher's Monthly Attendance Records

You can view a teacher's monthly attendance totals.

1. On the Home screen, click **Teachers**.
2. Double-click a teacher's record.
3. Click the **Teacher** tab.
4. Click **Inquiry**. Attendance summaries display to the right of the calendar.

Manage Staff Records

Add a Staff Member

Staff are the people employed by your school or daycare. While a school's staff generally includes teachers, make it a habit to enter all school employees (except teachers) in the Staff List. Enter Teachers into the Teacher List and a staff record will be created automatically for you.

For example, enter administrative, janitorial, cafeteria, or other miscellaneous employees in the Staff List. When you enter an individual in the Staff List, it doesn't create a teacher record. However, when you enter an individual in the Teacher List, it automatically creates a staff record.

1. On the Home screen, click **Staff**.
2. Click **New**.
3. Click each tab to enter information into the appropriate fields.
4. To save the record, click **OK**.

Create a Teacher or Parent Record from a Staff Record

When a staff member becomes a teacher, or a staff member's child enrolls in your school or daycare, you can create a teacher or parent record from the staff record. This doesn't change the staff record. Instead, it adds an additional record, so there are now two records for this individual: One staff record, and one teacher or parent record.

1. On the Home screen, click **Staff**.
2. Select an individual's record.
3. On the toolbar, click **Actions** > **Additional Type** > **Make this Staff member a Teacher** (or) **Make this Staff member a Parent**.
4. Enter additional information or make changes to the record.
5. Click **OK**.

Define Staff Lists and Options

Prior to adding new staff records, you can simplify your data entry efforts by setting up staff options and defining staff lists.

Staff Options Checklist:

? Unknown Attachment Customize reasons for leaving.

? Unknown Attachment Customize staff status.

? Unknown Attachment Set up individual lists.

Customize Reasons for Leaving

You can define a custom list of reasons staff people leave employment, such as Resigned, Terminated, or Transferred.

1. On the Home screen, click **Define List**.
2. Under Available Fields, expand **Staff**.
3. Click **Reasons for leaving**.
4. Click **Add**.
5. Enter a new reason and click **OK**.
6. Click **OK**.

Customize Staff Pay and Employment Status

With the Staff Status, you can indicate how an employee is paid (Hourly, Salaried, or Volunteer), or the amount of time an employee works (Part-time, Fulltime, Contract).

To add a staff status

1. On the Home screen, click **Define List**.
2. Under Available Fields, expand **Staff**.
3. Click **Staff Status**.
4. Click **Add**.
5. Enter a new status, such as **Part-time**, **Hourly**, or **Volunteer**, and click **OK**.
6. Click **OK**.

To delete a staff status

1. On the Home screen, click **Define List**.
2. Under Available Fields, expand **Staff**.
3. Click **Staff Status**.
4. Select a status type.
5. Make changes and click **OK**.
6. To remove a status, click **Delete**.
7. Click **Yes**.
8. Click **OK**.

Import HeadMaster time into Payroll

When you interface HeadMaster with ACS Financial Suite. you can import time from HeadMaster into ACS Payroll.

First, import employee records from HeadMaster into Payroll. This saves time and reduces any errors that could come from reentering information. From time to time, you should refresh employee records to update Payroll with any changes made in HeadMaster.

1. Open ACS Financial Suite
2. Under Manage Records, click the **Records** tab.
3. In the drop-down list, select Add/Edit Employees, then click **Go** .
4. In the Add/Edit Employees window, click **Import**.
5. In the Import Individuals window, under **Import Individuals From:** select **People**, **Organizations**, or **HeadMaster**.
6. If you use multiple datasets, select the **Dataset** to import from in the drop-down list.
7. Click **OK**.
8. In the Add from People or Add from HeadMaster window, select the records you want to import, then click **OK**. 9. If a confirmation message displays, click **OK**. After adding, the records display in the Add/Edit Employees grid.

Then, process the Automated Staff Check In/Out List report in HeadMaster. In this step, you'll save the export to your computer.

1. In HeadMaster, on the Main Menu, click **Reports**.
2. Expand **Check In/Out**, then select **Automated Staff Check In/Out List**.
3. In Check In/Out, enter or select the pay date range for the report.
4. To export the totals to ACS Financial Suite, click **Export**.
5. Save the .CSV export to your computer.

You can then import the Automated Staff Check In/Out List that you saved into ACS Financial Suite.

1. Open ACS Financial Suite
2. Under Manage Records, click the **Transactions** tab.
3. In the drop-down list, select **Payroll Checks**, then click **Go** .
4. Click **Enter Time Sheets**.
5. If necessary, select a bank.
6. Click **Import Time**.
7. In the **Import Type** drop-down list, select **Headmaster**.
8. To omit the header record, select **Omit first record?**.
9. Click **Import**.
10. Locate the file that you just saved and click **Open**.
11. If you receive error messages and want to print a listing of errors, click **Print Errors**.

Delete a Staff Member Record

Staff members can be removed from the data set. If there's a related teacher record for the staff member, the teacher record won't be deleted.

Useful Information: You must delete teacher records from the Teacher List window. See Delete a Teacher Record on page 69.

To delete a staff record

1. On the Home screen, click **Staff**.
2. Select a record.
3. Click **Delete**.
4. Click **OK**.

View a Staff Member's Monthly Attendance Records

You can view a staff member's monthly attendance totals.

1. On the Home screen, click **Staff**.
2. Double-click a staff member's record.
3. Click the **Staff** tab.
4. Click **Inquiry**. Attendance summaries display to the right of the calendar.

Manage Alumni Records

Add an Alumnus

Alumni are students who have graduated from your school. When a student graduates, you can convert the student record to an alumnus record and retain the information found on the student's General, Address, Phone, Custom, and Communication tabs. In addition, you can record their graduation date and the college attended.

If a student record doesn't exist for a graduate, you can create a new alumni record.

Alumni can be added to your database in one of three ways:

- You can promote a current student record from the highest available grade level to an Alumni record using the Promotion Utility.
- You can use the Actions menu in the Student List window to create an alumni record from a student record. For more information, see Make a Student an Alumnus on page 33.
- You can add an individual directly into HeadMaster as an alumnus. For more information, see the procedure below.

To add an alumni

1. On the Home screen, click **Alumni**.
2. Click **New**.
3. Click each tab to enter information into the appropriate fields.
4. To save the record, click **OK**.

Deleting an Alumnus Record

When you delete an alumnus, all of the individual's information will be removed from the data set.

1. On the Home screen, click **Alumni**.
2. Select an alumnus record and click **Delete**.
3. Click **OK**.

Manage Other People Records

Add Other People

With the Other People group, you can categorize individuals or businesses associated with the school who don't fall into any of the other predefined categories. Examples include board members, volunteers, speakers, grandparents, or businesses that contribute.

1. On the Home screen, click **Other People**.
2. Click **New**.
3. Click each tab to enter information into the appropriate fields.
4. Click **OK**.

Delete Other People Records

When you delete Other People records, all information is deleted from the data set and they are removed from all other individual's records.

1. On the Home screen, click **Other People**.
2. Select an individual's record and click **Delete**.
3. Click **OK**.