


















## What do you want to do?

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# 1 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.



Toolbar Buttons	Function
	Click to update or refresh the current window.
	Displays the number of records in the List window.



# 2 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.

Full Name	Individual ID	Grade Level	Assignment Location	Action	Location	Assignment	Date of Birth
Chen, Yip Hui	1128	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1129	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1130	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1131	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1132	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1133	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1134	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1135	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1136	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1137	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1138	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1139	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1140	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1141	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1142	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1143	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1144	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1145	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1146	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1147	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1148	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1149	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999
Chen, Yip Hui	1150	3	3. Science, Science (S)	30	Home	30.1.1.1.1.1.1.1.1	11/11/1999



## 3 Preview and Print an Individual's Schedule

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

To preview a schedule


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.

To customize the preview display

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.

To print an individual's schedule

1. On the Home screen, click **Students** or **Teachers**.
2. Double-click a name.
3. Click the **Schedule** tab.
4. Click **Print**. The Print Preview window displays.
5. Click **Print**  icon.



## 4 Log Communication in an Individual's Record

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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. For more information, see [Generate and Log Correspondence](#).

To record correspondence 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**.



## 5 Enter Custom Information in an Individual's Record

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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**. For more information, see [Manage Custom Fields](#).

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

To view or enter custom information

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**.



## 6 Update Family Information in an Individual's Record

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What do you want to do?

- [Add a Family to an Individual's Record \(see page 8\)](#)
- [Select an Existing Family for an Individual's Record \(see page 9\)](#)
- [Remove a Family from an Individual's Record \(see page 9\)](#)

### 6.1 Add a Family to an Individual's Record

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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 a family for an individual

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 mark the primary family

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**.

## 6.2 Select an Existing Family for an Individual's Record

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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.

To select an existing family for an individual

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**.

## 6.3 Remove a Family from an Individual's Record

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

To remove a family from an individual's record

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, and click **Remove**.



## 7 Track Activities

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Activities are categories that are user-definable and specific to either a student, parent, teacher, or class. HeadMaster comes with some of the lists pre-defined, 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. For more information, see [Set Up an Activity List](#).

### Useful Information

You can add multiple individuals to an activity using the Manage Activities feature. For more information, see [Manage Activities](#).

To add an activity to a record

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**.

To delete an activity from a record

1. On the Home screen, click **Students, Parents, or Teachers**.
2. Double-click a list entry.
3. Click the **Activities** tab.
4. Select an activity, and click **Delete**.



## 8 Send Email to an Individual

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When you want to send an email to an individual, you can send it from within their record.

To send an email from within a student's record

1. On the Home screen, click the group where the record is located.
2. Double-click an individual's record, and click the **Phone** tab.
3. Click an email address, and click **Send E-Mail**. Your default email program opens addressed to the individual.
4. Enter your email message, and click **Send**.

### **Useful Information**

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



## 9 Set a Primary Address

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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.

To set the primary address

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**.



## 10 Manage Prospective Students Records

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### What do you want to do?

- [Print the HeadMaster Enrollment Form \(see page 13\)](#)
- [Add a Prospective Student \(see page 13\)](#)
- [Add Prospective Students from Existing Records \(see page 14\)](#)
- [Enroll a Prospective Student \(see page 14\)](#)
- [Track Inquiries for Prospective Students \(see page 15\)](#)
- [Delete a Prospective Student's Record \(see page 15\)](#)
- [Track Application Requirements for Prospective Students \(see page 15\)](#)
- [Work with Grids](#)

### 10.1 Print the HeadMaster Enrollment Form

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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.

To print the enrollment form

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.

### 10.2 Add a Prospective Student

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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.

To add a prospective student



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.

3. Enter the student's information, and click **Next** until you finish entering the student's information.
4. Click **Finish**.

## 10.3 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.

To add a prospective student from an existing record

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**.

## 10.4 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.

To enroll a prospective student

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.



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## 10.5 Track Inquiries for Prospective Students

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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.

To create a list of inquiry items

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.

To log completion of inquiry items

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 inquiry, and enter a completion date.

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## 10.6 Delete a Prospective Student's Record

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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.

To delete a prospective student

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**.

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## 10.7 Track Application Requirements for Prospective Students

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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.

To create a list of application requirements

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.

To log completion of application requirements



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.





# 11 Manage Student Records

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## What do you want to do?

- [Add a New Student \(see page 17\)](#)
- [Add Students from Existing Records \(see page 18\)](#)
- [Transfer a Student \(see page 19\)](#)
- [Set Student Options and Define Student Lists \(see page 19\)](#)
- [Set Up Student Note Categories \(see page 20\)](#)
- [Enable the Student Assistant \(see page 20\)](#)
- [Manage Student Enrollment \(see page 21\)](#)
- [Manage Grade Levels \(see page 21\)](#)
- [Manage Notes in a Student's Record \(see page 22\)](#)
- [Customize Grade Status Types \(see page 23\)](#)
- [Add or Edit Reasons for Student Withdrawal \(see page 24\)](#)
- [Access Student Behavior Records \(see page 25\)](#)
- [View a Student's Permanent Record \(see page 25\)](#)
- [Make a Student an Alumnus \(see page 25\)](#)
- [Change a Student's Homeroom Teacher \(see page 26\)](#)
- [Enter and View Student Registration Information \(see page 27\)](#)
- [Enter and View Student Withdrawal Information \(see page 27\)](#)
- [Retain a Student \(see page 27\)](#)
- [View a Student's Current GPA or Grade Average \(see page 28\)](#)
- [View Student Attendance Information \(see page 28\)](#)
- [Enter or View Student Graduation Dates \(see page 29\)](#)
- [Delete a Student Record \(see page 29\)](#)
- [Track Re-enrollment Requirements for Students \(see page 29\)](#)
- [Track Application Requirements for Students \(see page 30\)](#)
- [Edit a Student Schedule \(see page 30\)](#)
- [Remove a Class from the Student Schedule \(see page 31\)](#)
- [Set Student Pickup Details \(see page 31\)](#)
- [Add a Former Student to the Active Student List \(see page 32\)](#)
- [Work with Grids](#)

## 11.1 Add a New Student

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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 \(see page 19\)](#).

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

To deactivate the Add Student Assistant

1. On the Home screen, click **Options**.
2. Click **Settings**.
3. Clear the **Use Student Assistant when adding new students** check box.

To add a new student record

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

## 11.2 Add Students from Existing Records

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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.

To add a student using another student's record

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.

To add a student from a parent's record

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**.

## 11.3 Transfer a Student

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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.

To transfer a student

1. On the Tools menu, click **Assistants > Transfer Student**.
2. Select a student, and click **Next** after you complete each window.

### 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**.

3. Click **Finish**.
4. When the transfer is complete, click **OK**.
5. Click **Close**.

## 11.4 Set Student Options and Define Student Lists

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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

- Add [custom fields](#) for information you want to track.
- Set up the [immunizations](#) list.
- Set up a [default ZIP code as well as frequently used ZIP codes](#).



- Enable the [Student Assistant](#) (see page 20).
- Set up [individual lists](#).
- Set up [grade levels](#) (see page 21).
- Customize [grade status types](#) (see page 23).
- Set up [note categories](#) (see page 20).
- Set up [withdrawal reasons](#) (see page 24).

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## 11.5 Set Up Student Note Categories

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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.

To add a note category

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**.

To edit a note category

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**.

To remove a note category

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**.

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## 11.6 Enable the Student Assistant

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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.



To enable the Student Assistant

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**.

## 11.7 Manage Student Enrollment

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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.

## 11.8 Manage Grade Levels

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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.

To add grade levels

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 that you can easily locate and update graduated seniors if you don't have HeadMaster Pro.

#### **Useful Information**

Make sure that the grade levels in the list are in ascending order so that 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**.

You can also delete grade levels.

To delete a grade level

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**.

## 11.9 Manage Notes in a Student's Record

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You can add notes to any student's record. Notes are categorized so that they can be grouped or sorted. For more information, see [Set Up Student Note Categories \(see page 20\)](#).

To add a note

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.

7. Enter the note, and click **OK**.

**Useful Information**

Check In/Out Notes are also 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.

To 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**.

To 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**.

## 11.10 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 grade status types

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 remove 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**.

## 11.11 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 remove 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**.





## 11.12 Access Student Behavior Records

---

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

To access behavior records from the Student List window

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:
  - To view details, double-click a record.
  - To edit an existing record, double-click the record.
  - To add a new record, on the menu bar, click **New**.
  - To delete a record, select the record, and click **Delete > Yes**.
4. When finished, click **Close**.

To access behavior records from the Behavior window

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

For detailed help with behavior records, see [Manage Student Behavior Records](#).

## 11.13 View a Student's Permanent Record

---

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

To view a student's permanent record

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

For more information, see [Managing Permanent Records](#).

## 11.14 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.

To make a student an alumnus

1. On the Home screen, click **Students**.
2. Select a student name.




3. Click **Actions** > **Make this Student an Alumnus**.
4. Click **OK**.

## 11.15 Change a Student's Homeroom Teacher

---

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

To assign a different homeroom teacher to a single 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.

To change the Homeroom Teacher in multiple records

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.

To change the Homeroom Teacher in selected records

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Homeroom Teacher**.
4. Select **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**.

---

## 11.16 Enter and View Student Registration Information

---

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

To enter student withdrawal 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**.

---

## 11.17 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.

To enter student withdrawal information

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**.

---

## 11.18 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.

To retain a student

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**.

## 11.19 View a Student's Current GPA or Grade Average

---

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

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

### Useful Information

To view or print a grade inquiry fro the student, click the **Inquiry** button.

## 11.20 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. For more information, see [Track Attendance](#).

### 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 student 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 reports markings made in Class Attendance.



## 11.21 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.

## 11.22 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 him or her including grades and attendance.

To delete a student

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

## 11.23 Track Re-Enrollment Requirements for Students

---

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

To create a list of re-enrollment requirements

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.

To log completion of re-enrollment requirements

1. On the Home screen, click **Students**.
2. Double-click the student's name.
3. Click the **Enrollment** tab.
4. 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](#).



## 11.24 Track Application Requirements for Students

---

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

To create a list of application requirements

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.

To log completion of application requirements

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

## 11.25 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.

To add a class to a student's schedule

1. On the Home screen, click **Students**.
2. Click to select a student's name.
3. On the menu bar, 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" so that it is highlighted. On the menu bar, click . To remove the filter, click .



To transfer a student from one class to another

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**.

## 11.26 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 for the class.

To remove a class from a student schedule

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**.

To remove all classes from a student's schedule

1. On the Home screen, click **Students**.
2. Double-click a student's name.
3. Click the **Schedule** tab.
4. Click **Add**.
5. Click **Remove All**.
6. Click **Yes > Close > OK**.

## 11.27 Set Student Pickup Details

---

You can enter the name, phone, and vehicle information for adults authorized to pick up a student.

To set student pickup details



1. On the Home screen, click **Students**.
2. Double-click a student name.
3. Click the **Pickup** tab.
4. Click **Add**. The Add Pickup window displays.
5. Enter the pickup details, and click **OK**.

## 11.28 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.

Roll Name	Roll Name	Withdrawn Status	Print	Withdraw Date	Extension Length	Extend	Extend	Extend
Roll 1	Roll 1	Withdrawn	Print	11/11/2011	1	Extend	Extend	Extend
Roll 2	Roll 2	Active	Print	11/11/2011	1	Extend	Extend	Extend

To add a former student to the active student list

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**.





## 12 Manage Parent Records

---

What do you want to do?

- [Add a New Parent \(see page 33\)](#)
- [Add Parents from Existing Records \(see page 33\)](#)
- [Delete a Parent Record \(see page 33\)](#)
- [Work with Grids](#)

### 12.1 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 other event.

To update family information, see [Update Family Information within an Individual's Record \(see page 8\)](#).

To add a new parent record

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**.

### 12.2 Add Parents from Existing Records

---

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

To add a parent from another parent's record

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**.

### 12.3 Delete a Parent Record

---

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

To delete a parent



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**.



## 13 Manage Family Records

---

### What do you want to do?

- [Adding a Family or Secondary Family](#)
- [Add New Family Members](#)
- [Add an Account for a Family](#)
- [Deactivate a Family or Family Members](#)
- [Delete a Family](#)
- [Delete an Account](#)
- [Exclude a Family from Receiving Statements](#)
- [Add an Address to an Existing Family Record](#)
- [Add a Phone Number for a Family](#)
- [Change an Address for an Existing Family](#)
- [View Family Contact Information](#)
- [Remove Family Members from a Family](#)
- [Integrate HeadMaster with ACS People](#)
- [Work with Grids](#)

### 13.1 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 dataset. 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 dataset, 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 dataset. However, you may occasionally need to add a secondary family, as in the case of a divorce or other event.

To update family information, see also [Update Family Information within an Individual's Record \(see page 8\)](#).

To add a new family

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 \(see page 39\)](#).
6. Click the **Phone** tab, and add phone information. See [Add a Phone Number for a Family \(see page 39\)](#).
7. Click the **Notes** tab, and add family notes.
8. To save the family record, click **OK**.

## 13.2 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.

On the Home screen, click **Families**.

To add a new individual

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

## 13.3 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.

To manually add an account

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. For more information, see [Enable the MICRImage Check Scanner](#).

To add an account by scanning a check

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**.

## 13.4 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.

To deactivate all members of a family

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. For more information, see [Activating or Deactivating a Group of Individuals](#).

## 13.5 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.

To delete a family

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**.

**Useful Information**

You can deactivate a family instead of deleting it. For more information, see [Deactivate a Family or Family Members \(see page 37\)](#).

## 13.6 Delete an Account

---

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

To delete an account

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**.



## 13.7 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.

To exclude a family from receiving a statement

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 record, click the **Family** tab, double-click the family you want to exclude. Click the **Address** tab, and clear the **Receive Statement** check box.

## 13.8 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.

To add an address to an existing family

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**.

## 13.9 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.



To add a phone number for a family

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**.

## 13.10 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.

To change a family address

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**.

## 13.11 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.

To view a family's address or list of phone numbers

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.

## 13.12 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 \(see page 38\)](#).





To remove one or more family members from a family

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**.

## 13.13 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.

To integrate HeadMaster with ACS People

1. On the Home screen, click **Options**.
2. Click **ACS People Integration**.
3. Select **Enable ACS People Integration**.
4. Make your selections to associate the HeadMaster fields with the equivalent ACS fields.
5. Click **OK > Close**.

To copy or link a family from HeadMaster to ACS People

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



### Useful Information

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



## 14 Manage Teacher Records

---

### What do you want to do?

- [Add a Teacher \(see page 42\)](#)
- [Create a Teacher Record From a Parent Record \(see page 42\)](#)
- [Create a Parent Record From a Teacher Record \(see page 43\)](#)
- [Delete a Teacher Record \(see page 43\)](#)
- [View and Print Teacher Schedules \(see page 43\)](#)
- [Set Up a Teacher's Classroom Manager Login and Password \(see page 44\)](#)
- [View a Teacher's Monthly Attendance Records \(see page 44\)](#)
- [Work with Grids](#)

### 14.1 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 \(see page 45\)](#).

To add a teacher

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**.

### 14.2 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.

To create a teacher record from a parent 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**.

## 14.3 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.

To create a parent record from a teacher 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**.

## 14.4 Delete a Teacher Record

---

You can remove teachers from the dataset. 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 from the class.

To delete a teacher

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

## 14.5 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. For more information about scheduling classes, see [Set Up and Schedule Classes](#).

To preview or print a teacher's schedule

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**.

## 14.6 Set up a Teacher's Classroom Manager Login and Password

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If you use Classroom Manager, you need to assign each teacher a login and password. If you don't own Classroom Manager, but want to know more about it, [visit our Web site](#).

To set up a Classroom Manager login and password for a teacher

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 user name and password.
5. Click **OK**.

## 14.7 View a Teacher's Monthly Attendance Records

---

You can view a teacher's monthly attendance totals.

To view a teacher's monthly attendance

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.



## 15 Manage Staff Records

---

### What do you want to do?

- [Add a Staff Member \(see page 45\)](#)
- [Create a Teacher or Parent Record from a Staff Record \(see page 45\)](#)
- [Define Staff Lists and Options \(see page 46\)](#)
- [Customize Reasons for Leaving \(see page 46\)](#)
- [Customize Staff Pay and Employment Status \(see page 46\)](#)
- [Delete a Staff Member Record \(see page 47\)](#)
- [View a Staff Member's Monthly Attendance Records \(see page 47\)](#)
- [Work with Grids](#)

### 15.1 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.

To add a staff member

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**.

### 15.2 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.

To make a staff member a teacher or parent

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**.

## 15.3 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:

- [Customize reasons for leaving \(see page 46\)](#).
- [Customize staff status \(see page 46\)](#).
- [Set up individual lists](#).

## 15.4 Customize Reasons For Leaving

---

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

To add reasons for leaving

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**.

## 15.5 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, Full-time, Contract).

To add staff statuses

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 edit or remove staff statuses

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**.

## 15.6 Delete a Staff Member Record

---

Staff members can be removed from the dataset. 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 also [Delete a Teacher Record \(see page 43\)](#).

To delete a staff member

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

## 15.7 View a Staff Member's Monthly Attendance Records

---

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

To view a staff member's monthly attendance

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.



## 16 Manage Alumni Records

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### What do you want to do?

- [Add an Alumnus \(see page 48\)](#)
- [Deleting an Alumnus Record \(see page 48\)](#)
- [Work with Grids](#)

### 16.1 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. For more information, see [Promote Students](#).
- 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 \(see page 25\)](#).
- You can add an individual directly into HeadMaster as an alumnus. For more information, see the procedure below.

To create an alumnus record

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**.

### 16.2 Deleting an Alumnus Record

---

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

To delete an alumnus

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





## 17 Manage Other People Records

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What do you want to do?

- [Add Other People \(see page 49\)](#)
- [Delete an Other People Record \(see page 49\)](#)
- [Work with Grids](#)

### 17.1 Add Other People

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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.

To add an other person

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**.

### 17.2 Delete an Other People Record

---

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

To delete an other person

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