What do you want to do?

- Manage Check In and Check Out Procedures (see page 2)
- Promote Students (see page 11)
- Track Attendance (see page 14)
- Post Grades and Print Report Cards (see page 23)
- Manage Student Behavior Records (see page 46)
- Manage Permanent Records (see page 51)

1 Manage Check In and Check Out Procedures

What do you want to do?

1.1 Check Individuals In or Out

You can use a bar code scanner or a keyboard to check students, parents, staff, and other people in and out. This is a simple and efficient way to track the arrivals and departures of students and staff to and from your school. Often, these logged times are used for attendance tracking, billing purposes, and security.

Once individuals check in or out, the information is saved and can be accessed later. When necessary, check in and check out information can be viewed and edited as well as printed on reports.

To check individuals in or out

1. On the Home screen, click **Check In/Out**. If the **Add Checkout Time** dialog box displays, read the Useful Information message below this procedure.
2. Using the scanner, scan your bar code; or, using the keyboard, enter your ID#.
3. If you are using a Parent ID, select a child or children to check in.
4. If you used the keyboard to enter your ID#, press **Enter** on the keyboard.

> ℹ️ **Useful Information**
>
> The **Add Check Out Time** dialog box displays if there are individuals who haven't checked out from a prior date. Follow the instructions at the top of the dialog box. If you select **Remember Settings**, the check out times you entered will be saved in the Auto Check Out section of the program. After you make your selections, click **OK**.

1.2 Send a Message for an Individual During Check In and Check Out

You can enter a note that can only be seen by a specific individual when he or she checks in or out.

To enter a note to display for an individual during check in/out

1. On the Home screen, click **Students**, **Staff**, or **Teachers**.
2. Double-click an individual.
3. To leave a message for a student, click the **Notes** tab; for a staff person, click the **Staff** tab; or for a teacher, click the **Teacher** tab.
4. In the Check In/Out Notes section, enter a message.
5. Click **OK**.

1.3 Send a Message for Everyone During Check In and Check Out

You can enter a note to display to all individuals when they check in or out.

To enter a note to display during check in/out

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. Enter a message in the Check In/Out Notes section.
4. Click **Close**.

1.4 View Check In and Check Out Information

With the appropriate security permissions, you can view check in/out information for a given day.

To view check in/out information

1. On the Home screen, click **Check In/Out Maintenance**.
2. On the toolbar, select a date from the **Date** drop-down list.
3. All the records for the selected date display. To view an individual log, double-click a name.

1.5 Check In Visitors

There are many reasons to electronically sign in visitors, rather than using an old-fashioned sign-in sheet.

- Parents attending school functions can be signed in electronically, giving you a record of their visit that's more secure than a sign in sheet.

- Parents and other school visitors not currently in your system are entered into your Other People records and receive badges with their name and reason for being on school grounds upon electronic check-in.
- When a parent signs in to pick up a child, the family information is automatically cross-checked for information pertaining to which parent may pick up that child.
- You can display family-specific messages when a parent checks in a child.

To check in visitors

1. On the Home screen, click **Check In/Out**.
2. Enter the requested information for the visitor.

1.6 Understand Check In and Check Out Options

Once you set up a dedicated workstation computer where students, parents, and staff can check in and out of the school, you can set the options for checking individuals in and out.

To set up Check In/Out options

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the Check In/Out tab, select the options you want.
4. Click **Close**.

Additional Field Descriptions

Check In/Out Grace Period

A grace period can be set up to automatically adjust double check ins or check outs. In the event of a double check in or check out, a message displays in the notes area letting the individual know that their times have been adjusted. For example, if an individual accidentally scans in more than once during the predetermined grace period, the first entry is the one that remains on the Activity report. It's recommended that the grace period be set to one minute because it's a reasonable amount of time for an individual to have made a scanning mistake and to have tried correcting it. Marking a grace period as zero isn't recommended as it doesn't allow for inevitable user mistakes.

Check In/Out Notes

You can enter notes to display for all of the individuals who check in and check out. For example, enter a note that says, "Welcome to the first day of school" or enter the lunch menu for the day. Notes entered here are viewed by all individuals when they check in or check out. Any note that's entered for the school or for an individual continues to display until it's changed or removed. You can also enter a note to display for an individual. In the individual's record, click the **Notes** tab. In the **Check In/Out Notes** section, enter any notes you want to display for the individual. For example, enter the note, "Call your Mother" for a student. When the student checks in or checks out, "Call your Mother" displays only for that student.

Check In/Out Password

If an individual attempts to close the Check In/Out window, they're required to enter a password if one has been set up. This is to protect the information behind the Check In/Out window of HeadMaster. The Check In/Out window cannot be closed without the correct password. If you forget the password, you must shut down the workstation, restart it, and reenter as a user. After three unsuccessful attempts to enter the password, HeadMaster closes.

Clear the Check In/Out window after 15 seconds

This default option gives the individual 15 seconds to read notes and then clears the window so that the next individual can log in. If cleared, the last person's information remains visible until the next person enters his or her ID # or scans a valid bar code.

Allow Visitors to Check In/Out

When visitors check in to your system for the first time, they'll be entered into your system as Other People.

1.7 Set Up Check In and Check Out Attendance Options

By setting attendance options, students are automatically marked absent until they check in. They can also be marked tardy or present after checking in.

You can set separate attendance options according to grade level. For example, if your school's policy states that students in grades K5 through 5th are officially tardy after 8:01 a.m., enter "8:01 AM" in the Time Student is Tardy field. If a student checks in at 8:02 a.m., they'll automatically be marked tardy and will be presented with the Check In/Out Tardy Notes, if any have been entered.

To set up Check In/Out Attendance options

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the Attendance tab, set the tardy and absent times and enter any notes.
4. Click **Close**.

To set the program to print tardy slips

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the Attendance tab, select the **Print a label whenever a student is tardy** check box.
4. Click **Close**.

> ⓘ **Useful Information**
>
> The tardy slips print to the same printer designated for Student/Visitor labels. You can set up this printer on the Check In/Out tab.

1.8 Set Up and Assign Check In and Check Out Billing Options

Check in/out billing is included in HeadMaster so your school or daycare center can offer childcare billing based on attendance. Billing can be calculated for minutes, hours, days, or weeks of attendance.

The basis of check in/out billing is the "billing plan." Billing plans define the rate, time, and frequency at which students will be billed.

To create a check in/out billing plan

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the **Check In/Out Billing** tab, click **Add**.
4. Enter a name for the billing plan, such as "Weekday School Care Plan".
5. Click **Add.** The Add/Edit Billing Plan window displays.

6. Enter the billing plan information, and click **OK**.

> ℹ️ **Useful Information**
>
> You can create additional time frames for this billing plan. For example, you charge another rate after 6:00 pm for parents who pick up their children late.

7. Click **OK.**

To edit or delete a check in/out billing plan

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the **Check In/Out Billing** tab, select a billing plan.
4. Click **Edit** to add, change, or delete time frames. Click **Delete** to remove the entire billing plan.
5. Click **OK**.

To assign a check in/out billing plan

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the **Check In/Out Billing** tab, select a billing plan.
4. Click **Assign**.
5. Select one or more students, and select a billing plan from the drop-down list.
6. Click **Select Plan**. The billing plan appears in the list next to the student(s). If you want to disassociate a plan from a student, select the student and click **Clear Plan**.
7. Click **OK**.

Additional Field Information

Description
A description for the time frame. For example, "After School Hours."

Rate
A billing rate and increment. For example, "$5.00 Per 1 Hour(s)."

Grace Period
The amount of time you will allow before billing starts. For example, if a child checks in at 3:30 and the parent checked the child out at 4:35, a five-minute grace period means the parent is only charged for one hour, not the additional five minutes.

Billing Code
The billing code can be used later when creating reports to sort and analyze whatever records the code is attached to. If a billing code is not selected, then the charges are placed in a miscellaneous revenue center.

1.9 Set Up and Disable Auto Check Out

With the Auto Check Out feature, you can set or disable automatic check out times for individuals.

To set auto check out times

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the **Auto Check Out** tab, select the **Use Auto Check Out** check box.
4. Enter the check out times, and click **Close**.

> ⓘ **Useful Information**
>
> If Auto Check Out is enabled, the Unlock Check In/Out button acts as a fail-safe in the event that an interruption occurs during a mass checkout. Only click the Unlock Check In/Out button if no individual on any computer can access the Check In/Out screen, and you're sure that a mass checkout isn't running.

To disable auto check out times

1. On the Home screen, click **Options**.
2. Click **Check In/Out**.
3. On the **Auto Check Out** tab, clear the **Use Auto Check Out** check box.
4. Click **Close**.

1.10 Use Individual or Mass Check In and Check Out

With the Check In/Out Maintenance feature, you can check in and check out individual students, parents, or teachers. Or, you can check in and check out multiple individuals at the same time.

To check in or check out an individual

1. On the Home screen, click **Check In/Out Maintenance**.
2. On the toolbar, click the **Date** drop-down list, and select a date.
3. Double-click an individual's record. The Check In/Out dialog box displays.
4. In the dialog box, click **New** to add a new time range. Click **Edit** to edit a selected time range. Click **Delete** to delete a selected time range.
5. Click **OK**.

To check in or check out multiple individuals at the same time

1. On the Home screen, click **Check In/Out Maintenance**.
2. On the toolbar, click the **Date** drop-down list, and select a date.
3. On the toolbar, click **Mass Check In/Out**.
4. Select either **Mass Check In** or **Mass Check Out**.

5. Click the **View Type** drop-down list to select a type. Clear check boxes for individuals you don't want to check in or check out.
6. Enter the check in or check out time in the **Check In Time** or **Check Out Time** field.
7. Click **OK**.

1.11 Preview or Print a Check In and Check Out Report

You can print a Check In/Check Out Report for any date, student, or staff member.

To preview or print a Check In/Check Out report

1. On the Home screen, click **Check In/Out Maintenance**.
2. On the toolbar, select a date from the **Date** drop-down list.
3. On the toolbar, click the **View Type** drop-down list, and select the type you want to view.
4. On the toolbar, click **Preview** or **Print**.

> ⓘ **Useful Information**
>
> You can access all of the Check In/Out reports by clicking the Reports button on the Home screen.

1.12 Print ID Cards Using HeadMaster Reports

You can print student ID cards using the Zenius and Primacy ID Card printers. Instead of using the eMedia software, you can print directly from the Student ID Cards {Avery 5371} report. You'll need to contact HeadMaster Support at 1-800-669-2509 to get a file to use with this report.

1.12.1 Support Use Only

Click here to download the file you will need to give to the client.

To print student ID cards from HeadMaster Reports

1. On the Home screen, click **Reports**.
2. In the Report List, expand **List**.
3. Select **Student ID Cards (Avery 5371)**.
4. Right-click on the report, and click **Copy**. The Copy report dialog box displays.
5. Enter a report name, and click **OK**. The copy of the report is added to the bottom of the List section of the Report List.
6. Right-click on the copy of the report, and click **Edit**. The ReportBuilder displays.
7. Click **File**, **Open**. Open the file given to you by HeadMaster Support.
8. On the toolbar, click **Label** 🅰 , and click anywhere on the badge to insert the label.
9. Delete the label. (This is to make a change in the report so that it can be saved.)
10. Click **Close** ⬚✕⬚ . When the confirmation message displays to save changes, click **Yes**.

11. **Optional:** To use a previously saved search, click the Use Search list. Searches will be limited to the appropriate type.
12. **Optional:** To sort data on the report, click the Sort by list. Sort by arranges data in ascending or descending order for the field selected. Next, select either the Ascending or Descending option.
13. **Optional:** To group data on the report, click the Group by list.
14. **Optional:** Set filters as desired.
15. To preview the report, click **Print Preview**. To print, click **Print**.

2 Promote Students

What do you want to do?

-
-
-

2.1 Prepare for Promotion

Promotion is the action of moving a group of students to the next grade level. This is achieved by creating a new database and adding the promoted students to their new grade level. You can select one or several databases to promote at one time.

Once you complete the school year, an administrator can promote students to the next grade level. However, there are several tasks you must complete prior to promoting students.

Before promoting students, complete the following year-end procedures:

- Calculate grades and attendance.
- Print final report cards.
- Update permanent records.
- Mark failed students, "Do Not Promote."
- Create a backup.
- Ensure grade levels are in the correct order in HeadMaster. For more information, see Manage Grade Levels.

If a student isn't being promoted, you can indicate that the student should be held back in the same grade for the next school year.

To mark students as "Do Not Promote"

1. On the Home screen, click **Students**.
2. Select the first student not being promoted. To open the student record, double-click the student.
3. Click the **Student** tab.
4. Select the **Do Not Promote** check box.
5. To save, click **OK**.
6. Repeat for each student you don't want to promote.

2.2 Promote Students to the New Year

After you have prepared for promotion (see page 11), and before you begin the promotion routine, review the grade levels and make sure they're in the correct order. For more information, see Manage Grade Levels .

⚠ **Note**

All other users must exit HeadMaster prior to you running the promotion utility.

⊘ **Tip**

To start the Utility Manager, on the Windows® Start menu, click All Programs. Point to HeadMaster, and click Utility Manager. You will be prompted to enter your user name and password.

⚠ **Note**

Once you promote a database, it cannot be "unpromoted". Back up your data before you begin the promotion routine.

To create a backup

1. On the Windows taskbar, click **Start**.
2. Point to **All Programs** > **HeadMaster** > **Utility Manager**.
3. Log into HeadMaster.
4. Click **Create Backup**.
5. Click **Browse** to select the location where save the backup.
6. Select any other options you want.
7. Click **Backup**.

When you're promoting students to a new year, only unpaid invoices and outstanding payment credits are transferred. Any students, active or inactive, with an outstanding debit or credit balance transfer to the new dataset. Multiple invoices for the same billing code combine into one transaction for the total billed amount, and the invoice date is the date of the most recent invoice from the original dataset.

For partially paid invoices, only the remaining balance transfers to the new dataset. All credit balances are attached to family records with the original payment date.

If any promoted Alumni have an outstanding balance, they remain on the student grid and are labeled as Inactive with a blank grade level. These Alumni print on all Billing reports that include Inactive students.

To perform promotion

1. In Utility Manager, click **Promote**.
2. Select a dataset, and click **Next**.

3. Enter the new database name. For example, if the old dataset was named 08-13 the new name would be 09-14. The New Database Name is limited to 8 characters.

> **ⓘ Useful Information**
>
> You will use multiple datasets only if you are promoting students from elementary to middle or high school and the students are stored in different datasets.

4. Click **Next**.
5. Verify the order of the new grade level.
6. For the last grade level, select either **Do Not Promote** or **Alumni**.
7. Click **Next**.
8. Make your selections, and click **Finish**.

2.3 Access the New Dataset After Promotion

Before you can open the new dataset, you must close the Utility Manager.

To access the new dataset, in the HeadMaster login window, enter your user name and password, click the Dataset drop-down list, and select the name of the new dataset. Click **OK**.

3 Track Attendance

What do you want to do?

3.1 Define Custom Reason Codes for Absences and Tardies

You can create a custom list that contains typical reasons for student and staff tardiness or absence. For example, individuals may be tardy due to doctor or dentist appointments, traffic-related problems, or because they overslept. They may be absent due to a death in the family, illness, or vacation.

While reason codes are optional, if you plan to use them, you should set them up prior to taking attendance. Once set up, you can quickly select the reason for the student or staff person's absence from a Absence Reason list in the attendance window.

To add reason codes

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand Attendance and click **Reason Codes**.
3. Click **Add**.
4. Enter the reason, and click **OK**.

To edit or delete reason codes

> ⚠ **Note**
>
> When you edit or delete reason codes, the code is changed throughout all records using the code.

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand Attendance and click **Reason Codes**.
3. To change a code, double-click it.
4. Make the changes, and click **OK**.
5. Click **Yes**.

3.2 Post Attendance

If you have HeadMaster Plus, HeadMaster Pro, and HeadMaster Pro with Classroom Manager, you can post attendance using the Class Attendance Assistant. With Classroom Manager, you can also post attendance on the seating chart.

You can post attendance for multiple classes at one time using the Class Attendance Assistant. You can also post attendance by students using the same assistant.

> ⚠ **Note**
>
> You don't need to mark students present, as this is selected by default. However, you can select a reason code if a student is in school but attending a school function during class time. Only mark students who are absent, tardy, unexcused absent, unexcused tardy, or none. If everyone in the school is present, you must still open the assistant and click **OK** to post the attendance for that day.

To post attendance for multiple classes

1. On the Home screen, click **Class Attendance**.
2. Select a date to post attendance for, and click **OK**.
3. Select **By Class** in the **View** drop-down list.
4. In the Classes list, double-click any classes you don't want to post attendance for. This clears the check box for the class.
5. In the Code section, select the attendance code you want to mark first. For example, to mark all absent students, select **Absent**.
6. In the Students section, double-click the student whose marking you want to change.
7. **Optional:** Select the reason that the student is absent from the Reason Code list.
8. Repeat steps 5 through 8 for each class that has Absent, Tardy, Unexcused Absent, Unexcused Tardy, or None markings.

You can post attendance for selected students using the Class Attendance Assistant.

To post attendance for selected students

1. On the Home screen, click **Class Attendance**.
2. Select a date to post attendance for, and click **OK**.
3. Select **By Student** in the **View** drop-down list.
4. In the Students list, double-click any students you don't want to post attendance for. This clears the check box for the student.
5. In the Code section, select the attendance code you want to mark first. For example, to mark all absent students, select **Absent**.
6. Click to select the first student.
7. In the Classes section, double-click the class you want to change the marking for.
8. **Optional:** Select the reason that the student is absent from the Reason Code list.

9. **Optional:** To give the same mark for all of the student's classes, click **Fill Down** after marking the first class. For example, if a student is absent from all classes, you can mark the first class with Absent then click **Fill Down** to automatically mark all other classes as Absent.

10. Repeat steps 5 through 9 for each student that has Absent, Tardy, Unexcused Absent, Unexcused Tardy, or None markings.

11. To post attendance for all of the selected students, click **OK**.

⚠ **Note**

You can use the Filter option to set a range of students or classes for each user. This way, a user can easily mark the students or classes they are in charge of without needing to sort through everyone. Remember that once a filter is set, it remains in effect until the filter is changed manually.

3.3 Post Attendance for Selected Students

You can post attendance for selected students using the Class Attendance Assistant.

To post attendance for selected students

1. On the Home screen, click **Class Attendance**.
2. Select a date to post attendance for, and click **OK**.
3. Select **By Student** in the **View** drop-down list.
4. In the Students list, double-click any students you don't want to post attendance for. This clears the check box for the student.
5. In the Code section, select the attendance code you want to mark first. For example, to mark all absent students, select **Absent**.
6. Click to select the first student.
7. In the Classes section, double-click the class you want to change the marking for.
8. **Optional:** Select the reason that the student is absent from the Reason Code list.
9. **Optional:** To give the same mark for all of the student's classes, click **Fill Down** after marking the first class. For example, if a student is absent from all classes, you can mark the first class with Absent then click **Fill Down** to automatically mark all other classes as Absent.
10. Repeat steps 5 through 9 for each student that has Absent, Tardy, Unexcused Absent, Unexcused Tardy, or None markings.
11. To post attendance for all of the selected students, click **OK**.

⚠ **Note**

You can use the Filter option to set a range of students or classes for each user. This way, a user can easily mark the students or classes they are in charge of without needing to sort through everyone. Remember that once a filter is set, it remains in effect until the filter is changed manually.

3.4 Mark Attendance with the Seating Chart

You can use the seating chart to mark class attendance. This is extremely useful for substitute teachers who don't know student names.

To use the seating chart to mark class attendance, you must first turn this option on in Options.

To use the seating chart to mark attendance

1. On the Home screen, click .

1. Click the **Mark Attendance** button.
2. Click on each student's desk to change the attendance marking.
3. When you finish marking attendance, in the bottom, right corner of the window, click the **Save Attendance** button.

⚠️ **Note**

To leave attendance mode, on the toolbar, click .

ℹ️ **Useful Information**

While viewing the seating chart, you can select a new date and/or class to mark attendance for. On the **Mark For** drop-down list, click the Lookup button, and make your selections.

3.5 Post School Attendance

School attendance is taken once a day and can be used to count the number of hot lunches needed.

ℹ️ **Useful Information**

If you use the Check In/Check Out feature available in HeadMaster Pro, you should not use the School Attendance Assistant to record school attendance. Instead, refer to Manage Check In and Check Out Procedures (see page 2).

Students don't have to be assigned to a homeroom teacher in order to record school attendance, but they won't display if you use a homeroom teacher filter. Additionally, if you use HeadMaster Pro, you also need to set dates for grading periods. For more information, see Set Dates for Grading Periods (see page 39).

> ℹ **Useful Information**
>
> The Student Profiles report lists each student's homeroom teacher.

Prior to posting school attendance, complete the following tasks:

- Set up Reason Codes. Reason Codes are brief explanations for why a student is tardy or absent, such as Sick, Funeral, Doctor, Dentist, or Traffic. For more information, see Define Custom Reason Codes for Absences and Tardies (see page 14).
- Set up Grade Levels. See Manage Grade Levels.
- Add students and assign homeroom teachers. See Add a New Student or Change a Student's Homeroom Teacher.
- If you use HeadMaster Pro, set up grading periods. See Set Dates for Grading Periods (see page 39).

3.5.1 Post Staff Attendance

When you post staff attendance, you can mark attendance for both teachers and staff members.

To post staff attendance

1. On the Home screen, click **School Attendance**.
2. Enter a date in the **Mark Date** field, or click **Select Date**.
3. In the View drop-down list, select **Staff**.
4. By default, every staff person is set to Present. To mark any other attendance type, select an attendance Code.
5. Double-click each staff person's name to change the attendance mark to the code you selected.

> ℹ **Useful Information**
>
> If the staff person doesn't want to order lunch, clear the Hot Lunch check box. **Note:** When a staff person is marked absent, the Hot Lunch check box is cleared automatically.

6. **Optional**: You can select or add a Reason Code for the staff person's tardiness or absence from the Reason list next to the individual's name. Examples include: Doctor, Sick, Funeral, or Traffic.
7. Repeat steps 4, 5, and 6 for each attendance code you want to use.
8. To save attendance markings, click **OK**.

> ✔ **Tip**
>
> You can also right-click a staff person's name and select an attendance code.

3.5.2 Clear School Attendance Totals

If you manually enter attendance, you may need to clear school attendance totals at the end of each semester or at year's end.

To do this, you can use the Clear School Attendance Totals Assistant. This clears the attendance totals found on the Student tab for each student record.

School attendance totals are found on each student record

To clear school attendance totals

1. On the Tools menu, click **Assistants** > **Clear School Attendance Totals**.
2. Click **Yes**.

3.5.3 Post Student Attendance for the School

You can post attendance for one grade level or the entire school using the School Attendance Assistant.

To post attendance for the entire school using the School Attendance Assistant, select ALL in the Grade Level list. Students in all grade levels display and are made available for attendance markings.

> ⓘ **Useful Information**
>
> If you use the Check In/Check Out feature in HeadMaster, you shouldn't use the School Attendance Assistant. For more information about Check In/Out, see Manage Check In and Check Out Procedures (see page 2).

To post student attendance

1. On the Home screen, click **School Attendance**.
2. Enter a date in the **Mark Date** field, or click **Select Date**.
3. **Optional**: To filter by a specific grade level, select a **Grade Level** in the Grade Level drop-down list.
4. **Optional**: To filter by teacher, select a name from the **Homeroom Teacher** drop-down list.

   > ⓘ **Useful Information**
   >
   > If you use Classroom Manager and you log in as a teacher, you will only see your student list.

5. By default, every student is set to Present. To mark any other attendance type, select an attendance code.
6. Double-click each student's name to change the attendance mark to the code you selected.

7. If the student doesn't want to order lunch, clear the **Hot Lunch** check box. **Note:** When a student is marked absent, the Hot Lunch check box is cleared automatically.
8. **Optional**: You can select or add a reason code for the student's tardiness or absence from the Reason Code list next to the student's name. Examples include: Doctor, Sick, Funeral, or Dentist.
9. Repeat steps 5, 6, and 7 for each attendance code you want to use.
10. To save attendance markings, click **OK**.

> ⊘ **Tip**
>
> You can also right-click a student's name and select an attendance code.

3.5.4 Recalculate School Attendance Totals

To recalculate the school attendance totals, use the Calculate Grades & Attendance Assistant. For more information, see Calculate Grades (see page 23).

> ⓘ **Useful Information**
>
> If the attendance totals were entered manually, you cannot recalculate them using the Calculate Grades & Attendance Assistant.

3.6 Perform an Attendance Inquiry

An Attendance Inquiry displays a calendar view of the selected individual's attendance for a specific month. Attendance totals for the month, as well as overall attendance totals, display to the right of the calendar. Additionally, if you applied attendance reason codes while taking attendance, the reason code displays when you click on the date the individual was absent.

You can perform an attendance inquiry to check school attendance for any of your staff, including teachers.

To perform an Attendance Inquiry

1. On the Home screen, click **Staff** or **Teachers**.
2. Double-click an individual's record.
3. Click the **Staff** or **Teacher** tab.
4. Click **Inquiry**.

You can perform an attendance inquiry to check school attendance for a student.

To perform an Attendance Inquiry

1. On the Home screen, click **Students**.
2. Double-click a student's record.
3. Click the **Student** tab.

4. In the School Attendance section, click **Inquiry**.

3.7 Set the Number of Unexcused Tardies that Equal an Absence

In Attendance Options, you can set the number of unexcused tardies that equal one absence. You can use this setting when calculating attendance for:

- Report Cards
- Student tab
- Post Grades
- HeadMaster Online
- Class Roster Attendance Summary report
- School Attendance Summary report
- Student Attendance Summary report

To enter the number of unexcused tardies that equal one absence

1. On the Home screen, click **Options**.
2. Click **Attendance**.
3. Enter an amount. For example, 2 unexcused tardies equal 1 unexcused absence.

3.8 Delete Attendance Postings for School or Class Attendance

If you want to remove all school or class attendance postings from your Headmaster data, use the Delete Attendance Utility. Generally, this utility is used to free up hard drive space or for housekeeping purposes, such as to remove markings for a specific term.

Prior to using the Delete Attendance Utility, we recommend that you complete the following tasks:

- Print a copy of the attendance records for the time frame you plan to delete.
- Back up your HeadMaster data.
- Require all users to exit HeadMaster. (Required)

To delete attendance records

1. On your Windows desktop, click **Start** > **All Programs** > **HeadMaster** > **Utility Manager**.
2. Enter your password, and click **OK**.
3. Click **Delete Attendance**.
4. At this point, you must call customer support at 1-800-669-2509 and obtain **Today's Password**.
5. Enter the password, and click **OK**.
6. In the Select Database list, select a dataset to remove attendance postings from.
7. In the Attendance Type section, select **Delete School Attendance** or **Delete Class Attendance**.

8. If you choose to delete class attendance, you have the option to select a specific class to delete. In the drop-down list below the Delete Class Attendance option, select the class with the attendance you want to delete.
9. Enter a date range in **Start Date** and **End Date**, or click to select dates from a calendar.
10. Click **Delete Markings**.
11. Click **Yes**.
12. Click **OK**. You can now log back in to HeadMaster.

4 Post Grades and Print Report Cards

What do you want to do?

4.1 Calculate Grades

> ⓘ **Useful Information**
>
> To enter, calculate, and post grades, you must have HeadMaster Pro™ or HeadMaster ProCM™.

Lower school administrators and teachers often need to post skill grades. HeadMaster's Skills Assistant 🔺 walks administrators through setting up a skills grading scale and building a skills list. Once these options are set up, the administrator can then assign skills to classes and subjects. Finally, teachers can use the Skills Assistant or the Post Grades Assistant to post skill grades.

When report card time arrives, administrators can use the Calculate Grades and Attendance Assistant 🖩 to quickly calculate and post period averages. Grades can be calculated for the entire school or by grade level.

With this assistant you can calculate grades for the entire school or by grade level. After you calculate grades, you can view the results in the Post Grades Assistant.

> ⚠ **Note**
>
> The Calculate Grades assistant must be run prior to:
>
> - Printing report cards
> - Running Update Permanent Records Assistant
> - Viewing Current Average/GPA on the student record

To calculate grades

1. On the Home screen, click **Calculate Grades**. The Calculate Grades dialog box displays.
2. Make your selections, and click **Calculate**.
3. When calculations are complete, click **OK**.

4.2 Customize the Gradebook

With HeadMaster ProCM, you can enter assignments and grades in the gradebook, as well as teacher comments that will print on the report card.

On the Home screen, click **Post Grades**. The Post Grades Assistant displays.

By default, the Post Grades Assistant displays all grading periods. However, if you only want to view specific grading periods or a semester, on the toolbar, click the **Grading Period** drop-down list and select a period to view.

To set additional display options for class grades, on the toolbar, click **Customize**. The Customize Post Grades dialog box displays. Make your selections to display in the gradebook.

Additional Field Descriptions

Show Period Absences
All student absences for the grading period.

Show Period Tardies
The number of times the student reported late to class for the grading period.

Show Total Absences
All student absences for the term.

Show Total Tardies
The number of times the student reported late to class for the term.

Show Period Effort
The markings for student effort for the period.

Show Effort
The markings for student effort.

Show Credits
The credits earned for the class by each student.

Show Grade Points
The grade points earned for the class by each student.

Show Letter Grade 1
Displays a student's current letter grade 1. This letter grade is determined when the grading scale is set up.

Show Letter Grade 2
Displays a student's current letter grade 2. This letter grade is determined when the grading scale is set up.

Show Assignments
Assignments in the gradebook. (Classroom Manager only)

ⓘ **Useful Information**

If you select to sort grades according to Assignment Type, the grades are grouped and sorted by the Assignment Type currently assigned. The type sorting is in alphabetical: A to Z or alphabetical: Z to A order and within each type the grades are sorted according to date. Whether the sorting is in ascending or descending order depends on your selection in Order By.

4.2.1 Select and Open a Gradebook with the Post Grades Assistant

To access the Post Grades Assistant, on the Home screen, click **Post Grades**. All gradebooks display in the left pane. In order to quickly locate a class, you can filter this list by teacher or by grade level with the drop-down lists. In the collapsible list view, select the class name. The gradebook for the class displays.

Set up Footnotes (Teachers Only)

Teachers can add unlimited footnotes to help explain the reasoning behind certain grades.

To set up footnotes

1. On the Home screen, click **Post Grades**.
2. Select a class for which you want to enter footnotes.
3. On the toolbar, select **Footnote**.
4. Click **Manage**.
5. Click **Add**.
6. Enter the text for your footnote, and click **OK**.
7. Click **OK**.

Apply Footnotes to Student Grades

Footnotes are available for teachers to add details specific to a grade given. For example, a failing grade can have the explanation attached with a Footnote, such as "Turned in late."

To apply a footnote to a student's grade

1. Select the cell that contains the grade you want to add a footnote to.
2. Right-click, and click **Footnote**.
3. Select the footnote you want applied.
4. The footnote appears in the cell that contains the grade you selected.

Enter Assignments in the Gradebook

One of the most convenient ways to add assignments is to add them while you're working in the gradebook. However, you cannot edit or delete assignments from here.

To open the gradebook, on the Home screen, click **Post Grades**.

To add assignments from the gradebook

1. In the gradebook, select the class you want to add assignments to.
2. On the toolbar, click **Assignments** > **New Assignment**. The New Assignment dialog box displays.
3. Enter a **Name**. Give your assignment a unique name to identify it. For example, enter "Principles of Algebra pp. 101-102."

4. Enter a brief **Description** of the assignment. For example, enter "All even numbered problems, show work."

5. To select the date the work is assigned and the date that the work is due, click [···] beside **Date Assigned** and **Date Due**.

6. To select the time frame (semester or grading period) within the school year or term in which the assignment's grade will be calculated, click the **Grading Period** list.

7. Under Weight, click the **Assignment Type** drop-down list to select a default assignment, or, to create a new one, select **<New>**. Once the assignment type is selected, the **How many times does this assignment count?** field defaults to the weight set up in the assignment type. If you use the point scale, **How many points is this assignment worth?** displays. You can edit the number.

8. Optional: To add additional comments, click the **Notes** tab.

9. Click **OK**. The assignment is added to the top of the gradebook in the grading period you indicated.

Mark an Assignment as Incomplete

When using the grade book, teachers can mark an assignment or a grading period as incomplete. When marked incomplete, the assignment or the grading period won't count toward the student's GPA or average.

To mark an assignment as incomplete

1. In the gradebook, select the student's cell for the incomplete assignment.
2. On the toobar, click **Incomplete**.
3. Click **OK**.

> ⚠ **Note**
>
> If you want to remove an incomplete mark from a student's grade, select the incomplete grade and click **Incomplete**. The grade then becomes null. You can also select the incomplete grade and enter a new grade to overwrite the incomplete mark.

Enter Grades in the Gradebook

To open the gradebook, on the Home screen, click **Post Grades**. You can enter a grade within each cell, and press the **Enter** key on your keyboard to save it. Use the arrow key on your keyboard to move to a new cell.

Enter Skill Grades in the Gradebook

You can post skill grades while viewing the gradebook.

Before posting skill grades, you must have entered skills for the subject. For more information, see View, Add, and Delete Skills for Classes.

You can also access skill grades using the Skills Assistant. To review and edit skill grades using the Skills Assistant, on the Home screen, click **Skills**.

To post skill grades

1. On the toolbar, click **Skills**. The Skills window displays.
2. Select **Mark Skill Grades**, and click **Next**.
3. Select a class from the **Class** drop-down list.
4. Click the **Grading Period** drop-down list, and select the grading period for which you want to post skill grades.
5. In the Students list, select a student. The skills for each class display on the right-hand side.
6. Click the drop-down arrow next to each skill and select a skill grade (usually Excellent, Satisfactory, Needs Improvement, Unsatisfactory, or Not Applicable).
7. After you select a grade for each skill, repeat steps 5 and 6 for each student.
8. When finished marking skill grades, click **Save**.

Enter the Same Grade for All Students

When most or all of your students earned the same grade for an assignment or quiz, you can save time by entering the same grade for all students at once. Then, you can change the grade for the few students who earned a different grade.

To enter the same grade for all students

1. On the Home screen, click **Post Grades**.
2. On the left sidebar, select a teacher and grade level from the drop-down lists.
3. In the assignment grid, select the assignment you want to add a grade for.
4. On the toolbar, click **Update All** > **Enter a grade for all students**.
5. Enter the grade, and click **OK**.

Exclude Grades From the GPA Calculation

You can exclude a grade from the overall calculation of the GPA for one or more students.

Example 1 – Mr. Smith told his class that he'd exclude each student's lowest quiz score for each nine-week period prior to calculating final grades. In this case, Mr. Smith will use step 2 in the procedure below to omit the lowest quiz grade for each student.

Example 2 – During the final week of the report card period, Mrs. Kennedy gave her students a test. However, no student scored higher than a 70 on the test. Because Mrs. Kennedy is concerned that her students didn't understand the unit, she'd like to exclude this set of test scores for all of her students. Mrs. Kennedy plans to re-teach the concepts and test again in the next nine week period. Mrs. Kennedy will use step 3 in the procedure below to omit the lowest test grade for all students in the class.

To exclude a grade from the calculation of the GPA

1. On the Home screen, click **Post Grades**.
2. On the left sidebar, select a teacher and grade level from the drop-down lists.
3. In the assignment grid, select the cell that contains the grade you want to exclude.
4. To exclude the grade for a single student, on the toolbar click **Omit**.
5. To exclude the grade for all students, on the toolbar, click **Update All** > **Omit for all students**.

> ⓘ **Useful Information**
>
> If you need to reverse the action in Step 5, click the **Update All** list and select **Include for all students**. The grade will now be considered when calculating the GPA.

Enter Notes to Print on Report Cards

Notes entered in the gradebook will print on a student's report card.

To enter teacher notes to print on report cards

1. On the Home screen, click **Post Grades**.
2. On the left sidebar, select a teacher and grade level from the drop-down lists.
3. In the class list, select a class.
4. Select a student from the list, and click inside the grading period you want to enter notes for.
5. Click in the **Teacher Comments** area, and enter the notes you want printed on the report card.
6. Click **OK**.

You can also manage notes that are used often, such as "Great job!," and add them to the report cards.

To manage common report card notes

1. On the Home screen, click **Post Grades**.
2. On the left sidebar, select a teacher and grade level from the drop-down lists.
3. In the class list, select a class.
4. Select a student from the list, and click inside the grading period you want to enter notes for.
5. At the bottom of the window, click **Manage**. The Select/Manage Comments dialog box displays.
6. Click **Add**. The New Comment dialog box displays.
7. Type your comment, and click **OK**.

8. In the Select/Manage Comments dialog box, select the comment you want to add.
9. Click **OK**.

> ℹ️ If you want to add the comment for the selected assignment to all students in the class, click **Apply to All**. Otherwise, repeat steps 1 - 9 for each student.

> ✅ **Tip**
>
> To view all report card notes, click the **View All** button.

Set Grade Status

Grade Status is used to track a student's status or overall standing in the class. It's not a required field. It's often used when a school prefers to print a grade status (such as Active, Withdrew, Failed, Dropped, or Incomplete) on the report card either with or without the grade.

For example, you can select "Incomplete" to note on the report card that the student's work is unfinished. The grade status prints on the report card beside the grade. You can select to omit the grade and print only the grade status. For help with this, see Print Report Cards (see page 34).

Before entering grade status, the school administrator should define or customize the possible grade status selections for your school.

To define grade status choices

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand **Student** and click **Grade Status**.
3. A list of available grade status types appears in the right hand window along with options to add, edit, delete, or print.
4. After you're done with an option, click **OK**.

To set the grade status for a student

1. On the Home screen, click **Post Grades**. The Post Grades Assistant displays.
2. On the left sidebar, select a teacher and grade level.
3. Select a class.
4. Select a student's name.
5. In the lower right-hand corner of the window, click the **Grade Status** drop-down list.
6. Select a status.
7. Click **OK**.

4.3 Enter Skill Grades

Many schools track skills along with grades, especially lower schools. For example, a first grade student may have a math grade, as well as grades for different math skills such as adding and subtracting.

With HeadMaster, you can track skills along with your subjects as well as print skills and skill grades on report cards.

Before entering skill grades for students, complete these tasks:

- An administrator must create the skills grading scale.
- Add skills that students must master. This may be completed by the teacher or an administrator.

4.3.1 Create the Skills Grading Scale and Add Skills

Skills are abilities or competencies acquired through training. For example, kindergarten children may be expected to:

- Tie shoes
- Add and subtract small numbers
- Name body parts
- Neatly write the letters of the alphabet

A sample skills grading scale is shown in the image below.

Skill Grade Codes

Code	Description
E	Excellent
S	Satisfactory
N	Needs Improvement
U	Unsatisfactory
NA	Not Applicable

You must create a skills grading scale before you can add skill grades or print them on report cards.

To create the skills grading scale

1. On the Home screen, click **Skills**.
2. Select **Add/Delete Skill Grade Codes**, and click **Next**. The Skills window displays.
3. To add a grade for a skill, click **Add**.
4. You can add, edit, or delete skill grades.
5. When you are finished setting up the grading scale, click **Close**.

You can add, edit, delete, or print skills.

To add a skill

1. On the Home screen, click **Skills**.

2. Select **Add/Delete Skills**, and click **Next**. The Skills window displays.

> 🛈 **Useful Information**
>
> To edit skills, delete skills, or print skills, follow steps 1 - 2 and make your selection.

3. Click **Add**. Enter a description for the skill, and click **OK**.
4. Repeat Step 3 for each skill you want to add.
5. When you're finished, click **Save**.

4.3.2 Assign Skills to Classes and Subjects

After you set up a list of skills to be mastered by students, assign one or more skills to specific classes and subjects.

> 🛈 **Useful Information**
>
> Administrators typically use the Skills Assistant to add and remove skills from classes. However, skills can also be managed in the Classes window on the skills tab.

To assign skills to classes and subjects

1. On the Home screen, click **Skills**.
2. Select **Assign Skills to Class Subjects**, and click **Next**. The Skills window displays.
3. From the Available Class Subjects column, select the class you want to add skills to. (Double-click the class to view the subject associated with it.) To add multiple classes, press and hold the **Ctrl** key on your keyboard as you select each class. Click **Add**. The classes and subjects move to the **Selected Class Subjects** column
4. Click **Next**.
5. Under Available Skills, select a skill to add. To select multiple skills, press and hold the **Ctrl** key on your keyboard as you select each skill. Click **Add**.
6. When you finish assigning skills, click **Save**.
7. Click **Yes**.

To remove skills from classes and subjects

1. On the Home screen, click **Skills**.
2. Select **Assign Skills to Class Subjects**, and click **Next**. The Skills window displays.
3. From the Available Class Subjects column, select the class you want to remove skills from. (Double-click the class to view the subject associated with it.) To add multiple classes, press and hold the **Ctrl** key on your keyboard as you select each class. Click **Add**. The classes and subjects move to the Selected Class Subjects column
4. Click **Next**.

5. Under Available Skills, select a skill to remove. To select multiple skills, press and hold the Ctrl key on your keyboard as you select each skill. Click **Remove**.

6. To remove all skills, click **Remove All**.

7. When you finish removing skills, click **Save**.

8. Click **Yes**.

4.3.3 Mark Skill Grades

Administrators and teachers can mark skill grades for students using the Skills Assistant.

> ⚠ **Note**
>
> Teachers can also post skill grades using the Post Grades Assistant, also known as the gradebook. For more information, see Enter Skill Grades in the Gradebook (see page 28).

To mark skill grades (Administrators Only)

1. On the Home screen, click **Skills**.
2. Select **Mark Skill Grades**, and click **Next**.
3. Select a class in the Class drop-down list.
4. Select a grading period in the Grading Period drop-down list.
5. In the Students list, select a student.
6. Under each subject, next to the skill, select a skill grade from the drop-down lists. If each listed skill has the same skill grade, select the first skill grade and click **Fill Down** 🔽 to apply the same grade to each skill. Repeat this step for each student.
7. Repeat Steps 5 and 6 for each student in the class.
8. To post the skill grades, click **Save**.

To mark skill grades (Teachers Only)

1. On the Home screen, click **Skills**.
2. Select a class in the Class drop-down list.
3. Select a grading period in the Grading Period drop-down list.
4. In the Students list, select a student.
5. Under each subject, next to the skill, select a skill grade from the drop-down lists. If each listed skill has the same skill grade, select the first skill grade and click **Fill Down** 🔽 to apply the same grade to each skill. Repeat this step for each student.
6. Repeat Steps 5 and 6 for each student in the class.
7. To post the skill grades, click **Save**.

4.4 Get Ready to Print Report Cards

HeadMaster offers two predefined report card types. In this section, we'll assist you in creating and printing report cards.

Before you print report cards:

- Enter Attendance. For more information, see Track Attendance (see page 14).
- Enter grades. For more information, see Enter Grades in the Gradebook (see page 28).
- Exclude any grades you do not included in the GPA calculation. For more information, see Exclude Grades From the GPA Calculation (see page 28).
- Exclude classes that should not be included on the report card. For more information, see Troubleshoot Report Card Issues (see page 35).
- Enter skill grades, if applicable. For more information, see Enter Skill Grades (see page 31).
- In Post Grades Assistant, enter notes to print on the report card. For more information, see Enter Notes to Print on Report Cards (see page 29).
- In Post Grades Assistant, enter Grade Status, if applicable. For more information, see Set Grade Status (see page 30).
- Calculate Grades and Attendance. For more information, see Calculate Grades (see page 23).
- **Optional**: Add comments to the report cards. For more information, see Enter Notes to Print on Report Cards (see page 29).
- **Optional**: Set up the order in which you want subjects to print. For more information, see Set the Order of Subjects to Print (see page 35).
- **Optional**: Set up school logo. For more information, see Add Your School Logo to Reports and Report Cards.

4.4.1 Print Report Cards

You can set up report cards to print:

- Up to eleven columns of grade period information, including numeric or letter grades, student absences, and tardies.
- Teacher notes, school absences, school tardies, and overall GPAs.
- For all students, or you can select students using saved searches or filters.
- Administrative comments and your school logo. For more information, see Add Your School Logo to Reports and Report Cards.

To print report cards

1. On the Home screen, click **Reports**, and double-click **Grades** to expand grade reports.
2. Select **Student Report Cards** or **Student Report Cards - Portrait**. Select the options you want to use.
3. Enter comments. Comments entered here will print on each report card. You can use this feature to print a school-wide message, such as the next scheduled PTO meeting or a holiday greeting on each student's report card.
4. Click the **Columns** tab.
5. Click the **Select Grading Period** drop-down list, and select a grading period. Each period displays in the Selected Columns list.
6. In the Selected Columns list, double-click to expand each period. Click the column name you want to add to the report card (Grade, Absences, Tardies, or Effort), and click **Add** to move the column to the right-hand pane. Repeat this step for each column name you want to add, up to 11 columns.

7. Make your selections in the **Additional** section.
8. To generate report cards, on the toolbar, click **Print**.

4.4.2 Set the Order of Subjects to Print

When printing progress reports, report cards, or skills reports, you can select the order that the subjects print on the report.

To set the order that subjects print

1. On the Home screen, click **Reports**.
2. Click the **Grades** drop-down list and select the **Progress Report**, **Student Report Cards**, or **Skills Report** you want to print.
3. Click **Order by**.
4. To rearrange the order of subjects, click the subject name, and click **Move Up** or **Move Down**.
5. When finished, click **Save**.

4.4.3 Troubleshoot Report Card Issues

The following issues often occur during the printing of report cards:

The report card displays Subject Names but you prefer Class Names or vice versa. – On the Main tab of the report cards setup window, under Options, click the **Description** drop-down list and select Class Names or Subject Names.
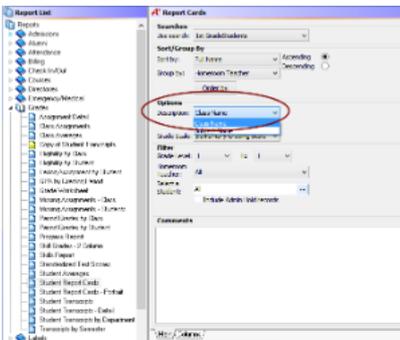
The report card displays a "0" for the grade, but this is not correct. – Recalculate the grades (see page 23) and attendance (see page 17).

The report card prints grades for incomplete course work. *It should print the grade status "Incomplete".* – If you prefer to print a grade status, but not the grade on the report card, you must omit the grade in the gradebook (see page 28) and customize the columns of the report card to include the grade status. This is especially useful in the case of incomplete grades. In the gradebook, select the grade in the calculated average column for the grading period. On the toolbar, click **Omit**.

The report card prints numerical grades instead of letter grades. – On the Home screen, click **Classes**. Double-click the class you want to edit. Click the **Subjects** tab, and click **Edit**. Change the Grade Type to Letter Grade, and click **OK.** On the Home screen, click **Post Grades**. Select the class. On the toolbar, click **Refresh**.

Skills do not print on the report card. – In the report card setup window, click the **Columns** tab. Under Additional, select the **Print Skill Grades** check box.

The grades are not correct on the report cards. – Recalculate the grades (see page 23). Then, preview the report cards again.

The overall GPA is not correct on report cards. – In the report card setup window, click the **Columns** tab. In the Report List, double-click a grading term, and select Grade. Click **Add**.

The overall GPA pulls to the report card by the Course Grade, not the last Period Grade. – Some classes print on the report card that shouldn't, while classes that should print don't. On the Home screen, click **Classes**. Double-click the class you want to edit. To include the class on the report card, select the **Active** check box.

Attendance and Tardies for school attendance does not print on the report card. – On the Home screen, click **Options**. Select **Grading Periods**. In the Grading Periods window, click **Set Dates**. Check to make sure dates are entered for each grading period. Next, calculate grades (see page 23) and attendance (see page 17). Finally, on the Columns tab of the report card setup window, select the **Print School Absences YTD** and **Print School Tardies YTD** check boxes.

The school logo does not appear on the report cards. – You may need to add the school logo to the HeadMaster data. For more information, see Add Your School Logo to Reports and Report Cards.

4.5 Set up Grading Options

Grading Periods are the sections of time for which grades are given. Usually, grading periods are divided into weekly increments (often 6 or 9), but can be divided however you like. Administrators can set up as many as twelve grading periods and name them whatever is most meaningful for your school's record keeping. You can create as many grading period structures as you need. For example, if your high school students use different grading periods than your middle school students, you can create a separate grading period structure for each group.

> ⊖ **Warning**
>
> Do not change any of the information on grading periods mid-year. This can compromise the integrity of your data. This information should only be changed at the beginning of a new school year when no grades have yet been entered. You can, however, add a new grading period, as long as you do not change a grading period once you have attached grades to it.

Before you set up your grading period structure, it's best to determine a few things about your grading periods:

How many grading periods do you have and what are they called? Determine how many grading periods you need to set up, including semesters, finals, and midterms. For example, HeadMaster Academy works on 6 six-week grading periods with midterms and finals divided into two semesters. Therefore, they set up 10 grading periods and name them.

Are the grading periods included in the average? Determine which grading periods count toward a student's final average and how much each period counts. Only the selected grading periods are included in the calculation of the students' averages.

How much does each grading period weigh toward the final grade? Determine the value of each grading period. Every period that you want counted toward the average (marked with a check) must have a weight, and the periods together must equal 100%. Each average must be selected in order to post grades for that period. If you don't want the posted grades to be averaged, select to add a grade, clear the Average check box, and click **Refresh** to update the page. For example, Headmaster Academy's 1st, 2nd, 3rd 6 Weeks, and Midterm weigh equally toward Semester 1. Since there are four periods that weigh equally, they are each worth 25% of the Semester 1 grading period. The same follows for the 4th, 5th, 6th 6 Weeks and Finals. They each are worth 25% of Semester 2. Semesters 1 and 2 are each worth 50% of the year since they make up equal halves.

Does a grading period work with another to form a "grouped grade", such as a semester grade? Finally, determine which individual grading periods should be grouped together, for example, to form a semester or a quarter. Continuing with the HeadMaster Academy example, Semester 1 is a "Grouped Grade" containing the 1st, 2nd, 3rd 6 Weeks, and Mid-term Exam. Also, Semester 2 is a "Grouped Grade" containing the 4th, 5th, 6th 6 Weeks, and Final Exams. You must designate the Group With grading periods.

ⓘ **Useful Information**

There is a default grading period already set up in HeadMaster. You may edit this or create a new grading period. If you have multiple grading periods, you can select one to be the default. With the grading period open, click the **Set as Defaul**t option beside the name.

4.5.1 Add a New Grading Period

You can create more than one grading period to be used at your school. One grading period should be selected to be the default grading period used when setting up classes.

To add a new grading period

1. On the Home screen, click **Options**.
2. Click **Grading Periods**. The Grading Periods dialog box displays.
3. Click **Create New**. The Set Period Dates dialog box displays.
4. Enter a name for the grading period. For example, enter "Elementary Grading Period".
5. Enter the Grading Period Structure information, and click **Next**. The Set Period Dates dialog box displays.
6. Enter the start and end dates, and click **Close**.

7. By default, the **Average** check boxes are selected. This means that the grades from each period will be included in the calculation of course grades. If you don't want to include the grades, clear the **Average** check box for the periods you don't want to include.

8. Enter the weight for each period. Weight determines what percentage of the final grade is represented by this period. The periods must total 100%.

9. In the Group With column, for each period contained within a period (such as each nine-week period contained in a semester), click the drop-down list to change how the periods are grouped within the semester. For semesters, the Group With should be set to **<none>**. The Hierarchy pane displays the grouping of periods under semesters.

10. To enter a new grading period, click **Create New** and repeat steps 4-9. When finished setting up grading periods, click **Close**.

> ⊘ **Tip**
>
> Click the **Auto Calculate** button to distribute weights evenly. Each grading period that's part of a Group With grade should equal 100%.

4.5.2 Add a Grading Period After the School Year Begins

You can add a new grading period after the school year begins. However, the new grading period won't automatically display as an option in the Post Grades window. In order to display the new grading period, you must update the grading periods using the Mass Change feature.

For example, in October, Mr. Jones decided that he wanted to add midterm exams to his High School Grading Period. However, teachers had already begun to post grades in the database. Mr. Jones edited the high school grading period, but he couldn't see the addition of midterm exams when he viewed the Post Grades window. Mr. Jones must update the grading periods for all high school classes using the Mass Change feature before grades can be posted to midterm exams.

To update grading periods

1. On the File menu, click **Mass Change**.
2. In the Available Fields list, expand **Setup** and select **Grading Period**.
3. In the Grading Period drop-down list, select the grading period you want to update.
4. Select the check boxes for the periods you want to update.
5. To update all classes, click **Select All** and go to step 8.
6. To update specific classes, click **Select**.
7. Select the classes you want, click **Add**, and click **OK**.
8. Click **Update**.
9. To confirm, click **Yes**.
10. Click **OK**.

4.5.3 Set Dates for Grading Periods

After you set up each grading period, set the calendar dates for the school year.

To set dates for grading periods

1. On the Home screen, click **Options**.
2. Click **Grading Periods**. The Grading Periods window displays.
3. If you have more than one grading period, click the grading period tab (located at the bottom of the window) that you want to set up dates for.
4. Click **Set Dates**.
5. In the Set Period Dates dialog box, enter the start and end date for each period.
6. Click **Close**.

4.5.4 Edit a Grading Period

⊖ **Warning**

Do not change any of the information on grading periods mid-year. This can compromise the integrity of your data. This information should only be changed at the beginning of a new school year when no grades have yet been entered. You can, however, add a new grading period, as long as you do not change a grading period once you have attached grades to it.

To edit an existing grading period

1. On the Home screen, click **Options**.
2. Click **Grading Periods**. The Grading Periods window displays.
3. Change the grading period information.
4. When finished editing the grading period, click **Close**.

4.5.5 Prevent Post Reporting Period Grade Changes (Administrator Only)

At the end of a grading period, you can lock the grade book. This prevents teachers from making last minute changes to entered grades and encourages students to make up any missed work in a timely manner. Once a grading period is locked, a teacher cannot add, edit, or delete an assignment or change grades in that grading period.

To lock a grading period

1. On the Home screen, click **Options**.
2. Click **Grading Periods**. The Grading Periods window displays.

3. Select the grading period tab (located at the bottom of the window) for the grading period you want to lock.
4. Beside the semester or nine-weeks you want to lock, select the **Locked** check box. A confirmation dialog box displays.
5. Once you have locked all grading periods you want to change, click **Close**.

> ⚠️ **Note**
>
> Once grading periods have been locked, they continue to display on the Grading Periods window, but are highlighted in yellow.

4.5.6 Set Up Grading Scales

A grading scale contains grades that are a symbolic representation of a student's performance in a class or curriculum. In HeadMaster, each grading scale can consist of a numeric system with up to two letter grade equivalents and a corresponding grade point scale. You must enter a numeric grade in the gradebook to calculate student averages. Also, if you track grade point averages, you must enter a grade points scale. The grading scale can print on report cards so that parents and students know what grades mean for each reporting period.

The table below contains one example of a grading scale.

Numeric (Greater Than)	Letter Grade 1	Letter Grade 2	Grade Points
0	F	U	0
60	D-	U	1
63	D	U	1
67	D+	U	1
70	C-	S	2
73	C	S	2
77	C+	S	2
80	B-	S	3
83	B	S	3
87	B+	E	3
90	A-	E	4
93	A	E	4
97	A+	E	4

Add a New Grading Scale

You can add an unlimited number of grading scales.

To add a grading scale

1. On the Home screen, click **Options**.
2. Click **Grading Scale**. The Grading Scales window displays.
3. Click **Create New**. The New Grading Scale dialog box displays.
4. Enter a name for the new grading scale, and click **OK**.

> ⓘ **Useful Information**
>
> After you add a grading scale, you can select one scale to be the default. With the grading scale open, click the **Set as Default** check box beside the name.

5. Click **Add.** The Grading Scale dialog box displays. Enter the following grade information for each level of your grading scale:
    - **Numeric (Greater Than or Equal To)** - Enter the lowest possible number of the grade. For example, if the letter grade is F, the lowest possible numeric grade is 0 (zero).
    - **Letter Grade 1** - Enter the letter grade equivalent of the numeric grade. This letter grade is usually reserved for the typical A, B, C, D, F grading scale.
    - **Letter Grade 2** - Enter a second letter grade equivalent for the numeric grade. This letter grade is usually reserved for the typical E, S, U grading scale.
    - **Grade Points** - Enter the number of points the grade level is worth. Usually, this scale is one to four or one to five. The grade points are used to calculate the GPA or Grade Point Average.
6. Set up any of the Grading Options you want to use.
7. Click **Close**.

> ⚠ **Note**
>
> If you delete all of the levels for a grading scale, the entire grading scale will be deleted.

Grading options affect how grades are weighted and ultimately calculated. Use the following fields to help you weight classes:

Additional Field Information

Extra grade points for honors
Enter the number of extra points in the field.
Extra grade points for AP
Enter the number of extra points in the field.
Use credits to weigh subjects GPA
Include credits in the calculation of the student's GPA. With this option, some classes could have more weight than others.
Use Credits to weigh subjects Average
Use the credits assigned to the class to weigh the subject in the calculation of the student's overall average. If this option is not selected, then all classes have the same weight.
Failing Grade
Enter a numerical grade that indicates the student is failing. This grade, and all grades below, will display in red in the gradebook.
Round Average to
Select the number of decimal places to round averages to, from 0 to 4. If you select 0, the average will be rounded to the nearest whole number.
Round GPA to
Select the number of decimal places to round the GPA to, from 0 to 4. If you select 0, the GPA will be rounded to the nearest whole number.

> ⚠️ **Note**
>
> If you set different rounding decimal places for different grading periods and a student has classes in both, their overall average will use the highest decimal place selected. This applies to both **Round Average To** and **Round GPA To**.

Change a Grading Scale

You can edit information in your grading scale.

> ℹ️ **Useful Information**
>
> If you change your grading scale in the middle of a term, the grades recalculate throughout the system.

To change a grading scale

1. On the Home screen, click **Options**.

2. Click **Grading Scale**. The Grading Scales window displays.
3. Select a grading scale, and click **Edit**.
4. Edit the information, and click **Close**.

Learn How HeadMaster Calculates the GPA

Student Grade Point Averages (GPAs) can be calculated in one of two ways:

If you don't select **Use credits to weight subjects GPA** when you set up your grading scale, GPAs will be calculated using the "Number of Classes" method, as follows:

- Total GPA Points/Number of Classes Taken = Grading Period GPA

If you select **Use credits to weigh subjects GPA** when you set up your grading scale, GPAs will be calculated using the "Credits Taken" method, as follows:

- Credits Taken x GPA Points = Class GPA

- Total of all Class GPAs/Credits Taken = Grading Period GPA

	Credits Taken	GPA Points	Class GPA
Class A	1	4.00	
Class B	1	4.00	
Class C	1	3.70	
Class D	1	3.70	
Class E	.5	4.00	2.00
Class F	1	3.70	
6 Classes	5.5	23.1	21.1

Number of Classes Method:

23.1 (Total GPA Points)/ 6 (Number of Classes Taken) = 3.85 (Grading Period GPA)

Credits Taken Method:

21.1 (Total of all Class GPAs)/ 5.5 (Credits Taken) = 3.84 (Grading Period GPA)

> ⓘ **Useful Information**
>
> For any students auditing a class, a red rectangle appears to the right of their names. If any grades are entered for these students, they aren't included in the overall average or GPA for them. For more information, see Marking Students Who Are Auditing a Class.

# 4.5.7 Enter Grading Information for Subjects and Classes

As an administrator, when you set up subjects in Headmaster, you can select the grade type that you want to appear on the report card (numeric, letter, or points), options that affect the overall grade (such as adding a point for Honors or AP classes), and the method by which the final grade should be calculated (by averaging assignments or by averaging periods).

For example, HeadMaster Academy's grading scale indicates that students receive an extra grade point for Honors classes, and a half grade point for AP classes. Additionally, the school has a policy that final grades should be calculated by averaging assignments. All classes should be included in the GPA and on the transcript. The school also wants to print the numerical and letter grade 1 on student report cards.

Mrs. Smith, an administrator for HeadMaster Academy, sets up classes for the school. First, she enters subjects, such as English, Biology, and History. In the Edit Subject window for each subject, Mrs. Smith selects the following options:

- For Grade Type, Numerical/Letter Grade 1
- Include in GPA
- Include in Transcript
- Calculate final grade by averaging assignments

When setting up subjects, Mrs. Smith does not select the Honors or AP option because only one of the multiple classes for each subject will be Honors or AP. She can set those options on the individual class record.
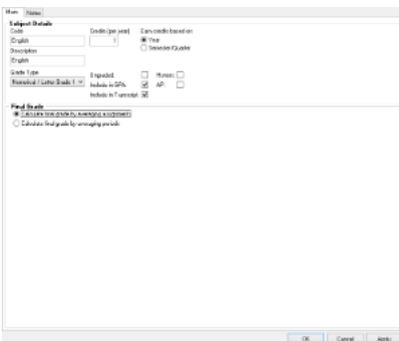
Next, Mrs. Smith sets up six English classes for ninth grade, four for the tenth grade, five for the eleventh grade, and five for the twelfth grade. In the Classes window, she clicks the **Subjects** tab. The settings she entered for the English subject have been applied. For the single Honors and AP class for each grade, she selects the Honors or AP options, as appropriate.
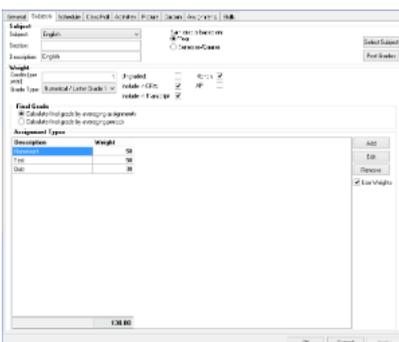
4.6 Access the Post Grades Assistant

Users of HeadMaster Pro can post grades using the Post Grades Assistant, also called the "gradebook."

> ✅ **Tip**
>
> You can navigate through the gradebook with the arrow keys.

To access the Post Grades Assistant, on the Home screen, click **Post Grades**.

You can also access the gradebook from the Classes window. On the Home screen, click **Classes**. In the Class List window, select the class you want to post grades for. On the toolbar, click **Grades**.

Prior to posting grades, make sure the following items have been completed.

- The administrator set up grading periods.
- The administrator set up grading scales.
- (Recommended) The administrator entered grading information for subjects and/or classes.
- The teacher set up assignment types and entered assignments.

The Post Grades Assistant displays the gradebook. For each student, the gradebook displays attendance, grades for assignments, report card notes, and grade averages. If you don't have HeadMaster Pro, your Post Grades Assistant window doesn't display the "Calculated Average" column. Instead, you will see a column labeled "Average". Additionally, the Adjusted Average only appears under the grading period for which the system is calculating the grades.
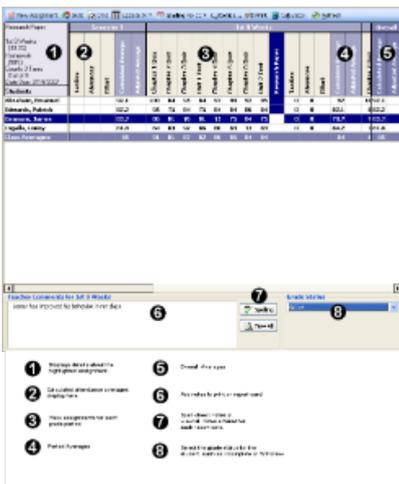
# 5 Manage Student Behavior Records

What do you want to do?

- Associate Unit Numbers With Actions Taken (see page 46)
- Delete Student Behaviors (see page 47)
- Enter Behavior Information (see page 48)
- Set Up Behavior Lists (see page 50)
- Work with Grids

5.1 Associate Unit Numbers With Actions Taken

With some prior planning, you can associate unit numbers with pre-defined actions taken in the Define Lists window. Then, when you select an action taken in the student's behavior record, the number of units previously associated with that action automatically fills the record.

You can still change the unit number in the Behavior window if you need to.
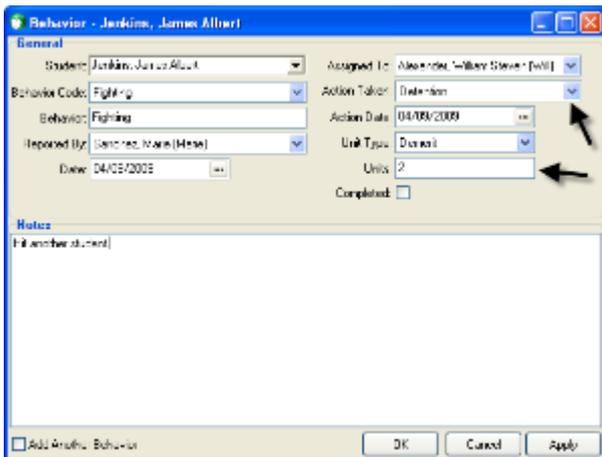
To associate unit numbers with Actions Taken

1. On the Home Screen, click **Define List**.
2. Under Available Fields, expand the **Behavior** category and click **Action Taken**.
3. In the list of available actions, select an action and click **Edit**. The Behavior Action Taken dialog box displays.
4. In the Units field, enter a number (negative or positive) and click **OK**.
5. Repeat steps 3 and 4 for each action.
6. When finished associating units with actions, in the Define List window, click **OK** to close.
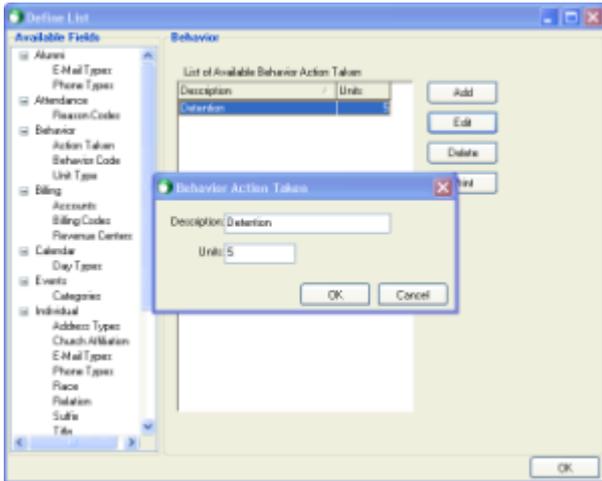
Sometimes a student receives demerits but performs work to reduce them. In cases like this, you can enter a negative number of units to reduce the demerit totals. The Behavior Summary report will display and subtract the negative demerits from the overall total.
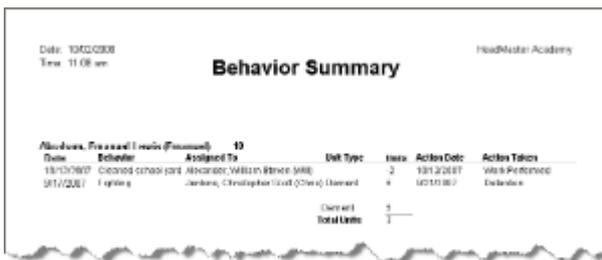
5.2 Delete Student Behaviors

There are two ways to delete behavior records, depending on the reason the record is being removed. For example, in the event that a record was entered in error, or you want to remove a behavior incident for some other reason, you can delete a single behavior record.

However, because student behaviors remain in the dataset from year to year, you might also find it necessary to delete behaviors for all students or for specific groups of students at the end of the school year or prior to the beginning of a new school year. To do this, you will need to use the Mass Change feature.

To delete a single behavior record

1. On the Home screen, click **Behavior**.
2. Select the behavior you want to delete.
3. On the toolbar, click **Delete**.
4. When the confirmation message displays, click **Yes**.

To mass delete behaviors for all students

1. On the File menu, click **Mass Change**.
2. Double-click **Students**.
3. Click **Behaviors**.
4. Select one of the following:
   - To remove behavior records that occurred on any date, select **All Dates**.
   - To specify behavior records within a specific time period, such as the first semester, select **Date Range** and enter beginning and ending dates.
5. Click **Select All**.
6. Click **Delete**.
7. To confirm, click **Yes**.
8. Click **OK**.

To mass delete behaviors for selected students

1. On the File menu, click **Mass Change**.
2. Double-click **Students**.
3. Click **Behaviors**.
4. Select one of the following:
   - To remove behavior records that occurred on any date, select **All Dates**.
   - To specify behavior records within a specific time period, such as the first semester, select **Date Range** and enter beginning and ending dates.
5. Click **Select**.
6. Click **Delete**.
7. Select the students you want to remove behaviors for.
8. Review the list and remove students for whom you don't want to remove behaviors. Click **OK**.

> ⓘ Student names that are removed from the list will retain their behaviors.

9. Click **Delete**.
10. To confirm, click **Yes**.
11. Click **OK**.

5.3 Enter Behavior Information

Behavior information is generally entered in the behavior window. However, you can also enter behavior records from the student list window. For more information, see Access Student Behavior Records.

To enter behavior information

1. On the Home screen, click **Behavior**.
2. On the toolbar, click **New**.
3. Enter behavior details.
4. To save the record, click **OK**.

To change or update a behavior record

1. On the Home screen, click **Behavior**.
2. In the Behaviors window, double-click the behavior note you want to edit.
3. Make the changes.
4. To save the record, click **OK**.

Additional Field Information

Student

Select the name of the student you are entering the behavior record for.

Behavior Code

Behavior codes are generally brief descriptions or categories of behavior issues, and they are set up in Options. Examples of behavior codes include: Fighting, Truancy, or Good Behavior.

Behavior

Enter an explanation of the behavior incident. For example, "Brison yelled at the teacher after being asked to take her seat."

Reported By

The teacher who reported the student's behavior.

Date

The date defaults to "today's date."

Assigned To

Select an individual who has the duty to make sure the school responds to the student's behavior if necessary. For example, principal, vice principal, teacher, or coach are examples of individuals who can follow up on a student's discipline.

Action Taken

Click the Action Taken drop-down list and select a description of the action. Or, select New from the Action Taken list and enter a new action taken. The action date is the date that the school's response to the behavior should take place.

Action Date

The date that the school's response to the behavior took place.

Unit Type

Select a Unit Type (demerits, merits) from the Unit Type list or select New and enter a new unit type.

Units

The number of units (demerits, merits, hours) assigned to the behavior. For example, if the student receives demerits for fighting, select Demerits from the unit type list and type 5 in the units field.

Completed

This true/false field is used to record whether the school's response to the behavior was completed.

Notes

You can use the Notes field to further document disciplinary activity such as conversations with parents, students, or school and law enforcement officials.

5.4 Set Up Behavior Lists

Before you enter behavior records, you can customize the user-defined behavior lists. Then, when you enter behaviors, you can select the Action Taken, Behavior Code, and Unit Type from the customized lists you created.

An Action Taken is a brief description of the type of discipline or follow-up to a discipline issue that will be taken. Examples include: Referred to principal, Suspended, Write sentences, or Expelled.

To customize the Action Taken list

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, expand **Behavior**.
3. Click **Action Taken**.
4. Click **Add**. The Behavior Action Taken dialog box displays.
5. Enter a description, and click **OK**.
6. Repeat steps 3 through 5 for each action taken you want to add.
7. Click **OK**.

Behavior Codes are generally one-or-two word descriptions that generally describe a type of behavior. Examples include: Fighting, Disruptive, or Truancy.

To customize the Behavior Code list

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, expand **Behavior**.
3. Click **Behavior Code**.
4. Click **Add**. The New Behavior Code dialog box displays.
5. Enter an behavior code, and click **OK**.
6. Repeat steps 3 through 5 for each behavior code you want to add.
7. Click **OK**.

Unit Type is the category or value that will be awarded the student for behavior. Examples include: Demerits or Days. When entering behavior records, you can assign a numerical value to the unit type, such as 3 demerits or 4 days of suspension.

To customize the Unit Type list

1. On the Home screen, click **Define Lists**.
2. In the Available Fields list, expand **Behavior**.
3. Click **Unit Type**.
4. Click **Add**. The New Behavior Unit Type dialog box displays.
5. Enter a unit type, and click **OK**.
6. Repeat steps 3 through 5 for each unit type you want to add.
7. Click **OK**.

6 Manage Permanent Records

What do you want to do?

6.1 Add an Activity to a Student's Permanent Record

A permanent record contains the complete school history for a student. Permanent records include personal information, transcript details, and standardized test scores that can be modified and added to from term to term.

Individual class information can also be tracked in permanent records. Within a school term, you can include information on the individual classes the student has taken or transferred during the term, as well as grades and credits received.

When you update permanent records, any activities in a student's record are added to his or her permanent record; however, you can add an activity directly to the permanent record.

To add an activity

1. On the Home screen, click **Permanent Records**.
2. Double-click the student you want to view.
3. Click the **Activities** tab.
4. Click **Add**. The Enter Activity Information dialog box displays.
5. In the Term Name drop-down list, select the school term in which the activity took place.
6. In the Description field, enter the activity. For example, band or soccer.
7. In the **Start Date** and **End Date** fields, enter the dates the student was involved in the activity.
8. Click **OK**.

6.2 Calculate Class Ranks

You can perform a class rank calculation for any term and grade level within the Permanent Records section.

To calculate class rank

1. On the Home screen, click **Permanent Records**.
2. On the toolbar, click **Set Class Rank**. The Class Rank Assistant displays.

3. Select a term, grade level, and evaluation method, and click **Next**.

> ⓘ **Useful Information**
>
> The first evaluation method in the list is the primary ranking method.

4. Exclude any students you want, and click **Post**.

6.3 Record Standardized Tests

What do you want to do?

- Add a New Standardized Test (see page 52)
- Add Standardized Test Scores (see page 53)
- Delete a Standardized Test (see page 53)
- Delete Standardized Test Information (see page 53)
- Edit a Standardized Test (see page 54)
- Edit Standardized Test Information (see page 54)
- Enter Standardized Test Scores for Students (see page 54)
- Print Standardized Test Information (see page 55)

6.3.1 Add a New Standardized Test

A standardized test is one that is administered under controlled conditions that specify where, when, how, and for how long children may respond to questions or prompts. These tests can include:

- State Mandated Tests - tests required by your state for graduation from high school.
- College Entrance Tests - tests required for admission to most colleges and universities. The most common college entrance tests are the SAT and the ACT.
- IQ Tests - tests that measure the test taker's intelligence quotient.

> ⓘ **Useful Information**
>
> Students must have a Permanent Record before you can record test scores for them. If you have not already done so, run Update Permanent Records to add student records. For more information, see Update Permanent Records (see page 55). In addition, you must set up standardized tests in HeadMaster. Test scores can be printed in a list or on transcripts.

To add standardized tests

1. On the Home screen, click **Standardized Tests**. The Set Up Standardized Tests dialog box displays.
2. Click **Add**. The Set Up Fields dialog box displays.

3. Enter the test name. If you don't want the test to print on students' transcripts, clear the **Print on transcript** check box.
4. Click **Add**. The Field Name dialog box displays.
5. Enter the standardized test field. For example, if you are adding the SAT, you would add three fields: Critical Reading, Mathematics, and Writing.
6. Click **OK**. Repeat steps 5 - 6 for each field you want to add.
7. Click **OK** > **Close**.

6.3.2 Add Standardized Test Scores

Once the standardized tests are added, you can add the test scores.

To add standardized test scores

1. On the Home screen, click **Standardized Test Scores**. The Standardized Test Scores dialog box displays.
2. In the Test Name drop-down list, select a test.
3. Click **Add**. The Test Scores dialog box displays.
4. Enter a score, and click **OK**.

6.3.3 Delete a Standardized Test

You can delete a standardized test as long as no test scores have been entered for the test.

To delete a standardized test

1. On the Home screen, click **Standardized Tests**. The Set Up Standardized Tests dialog box displays.
2. Select the test you want to remove, and click **Delete**.
3. Click **Close**.

6.3.4 Delete Standardized Test Information

You can delete standardized test information if there are scores entered. When you select to delete scores, a message displays, noting that all associated student scores will be removed as well.

To delete standardized test scores

1. On the Home screen, click **Permanent Records**.
2. Double-click the student you want to view.
3. Click the **Standardized Tests** tab.
4. Select a test, and click **Delete**.
5. Click **Yes** to confirm.

6.3.5 Edit a Standardized Test

If you made a mistake when entering a standardized test, or if you need to add additional fields to the test, you can edit the test as well as the test fields.

To edit a standardized test

1. On the Home screen, click **Standardized Tests**. The Set Up Standardized Tests dialog box displays.
2. Select the test you want to edit, and click **Edit**. The Set Up Fields dialog box displays.
3. Change the test name, or to change a field, select it and click **Edit**.
4. Click **OK** > **Close**.

6.3.6 Edit Standardized Test Information

You can change standardized test information for a student.

To edit standardized test scores

1. On the Home screen, click **Permanent Records**.
2. Double-click the student you want to view.
3. Click the **Standardized Tests** tab.
4. Select a test, and click **Edit**. The Test Scores dialog box displays.
5. Edit the test information, and click **OK**.

6.3.7 Enter Standardized Test Scores for Students

You must set up standardized tests before you can enter standardized test information on the student's transcript.

There are two ways to enter standardized test scores:

- If you have many test scores to enter, you can enter them in the Standardized Test Scores section which allows you to search for student names or filter by grade level, and enter the scores in a grid.
- When you only have one or two scores to enter, you can enter them in the Permanent Records section.

> ⚠️ **Note**
>
> Only students with permanent records display in the list.

To enter standardized test scores

1. On the Home screen, click **Standardized Test Scores**. The Standardized Test Scores dialog box displays.

2. In the Test Name drop-down list, select the name of the standardized test for which you are posting scores. The Default Test Date displays. You can change this date.
3. To filter students by grade, click the **Grade Level** drop-down list, and select a grade level.
4. Under **Student Name**, select a student.
5. Click **Add**. The Test Scores dialog box displays.
6. In the Test Scores dialog box, enter the test scores and click **OK**.
7. Select the next student and repeat steps 4 - 6 for each student.
8. Click **Close**.

To enter standardized test scores via Permanent Records

1. On the Home screen, click **Permanent Records**.
2. Double-click the student record you want to view.
3. Click the **Standardized Tests** tab.
4. Click the **Test Name** drop-down list, and select a test.
5. Click **Add**. The Test Scores dialog box displays.
6. Enter the test date.
7. Click in the field beside the test field, and enter the test scores for each field.
8. Click **OK**.

6.3.8 Print Standardized Test Information

You can print standardized test information for a student from the student's permanent records. You can also print student test score information from the Permanent Record reports.

To print a student's standardized test information

1. On the Home screen, click **Permanent Records**.
2. Double-click the student you want to view.
3. Click the **Standardized Test**s tab.
4. Click **Print**.

6.4 Update Permanent Records

What do you want to do?

6.4.1 Add a Single Permanent Record

Permanent Records consist of three types of records: personal information, transcript information, and standardized test scores. To access permanent records, on the Home screen, click Permanent Records.

If a permanent record doesn't already exist for a student, you must add a record prior to entering transcript information or standardized test scores.

To add a permanent record for all students in your data, use the Update Permanent Records assistant to create records and calculate grade averages. For more information, see Update Permanent Records (see page 55).

> ⚠ **Note**
>
> A student must be an active student in the dataset you are working in before permanent records can be added.

To add a single permanent record

1. On the Home screen, click **Permanent Records**.
2. On the toolbar, click **New**. The Select Student dialog box displays.
3. In the Select Student dialog box, double-click a student's name.
4. When the confirmation message displays, click **Yes**. The student's personal information, (name, DOB, SSN, gender, and contact information automatically fill the fields on the **Personal** tab). You can edit this information.
5. To enter transcript details and summary information, click the **Transcript** tab. For more information, see Update Transcripts (see page 59).
6. To enter or view standardized test scores, click the **Standardized Tests** tab. For more information, see Record Standardized Tests (see page 52).
7. To save the record, click **OK**.

6.4.2 Define Diploma Types and Programs of Study

A student's permanent record contains information for transcript purposes, such as Diploma Type and Program of Study. These fields categorize a student's school career focus. For example, some Diploma Types could be "Bachelors" or "Tech Center." Program of Study can also be referred to as a track. A track is a student's class focus such as "College Preparatory," "Business," or "Technology."

To add Diploma Types or Programs of Study

1. On the Home screen, click **Define List**.
2. In the Available Fields list, expand Transcripts and select **Diploma Type** or **Program of Study**.
3. Click **Add**. A dialog box displays.
4. In the Code field, enter a code for quick reference.

5. Enter a description.
6. Click **OK**.

6.4.3 Delete a Permanent Record

We recommend that you print a copy of a student's permanent record prior to deleting it.

> ⚠ **Note**
>
> - If you delete a student who already has a permanent record and later add the student back to the dataset, a duplicate permanent record will be created.
> - Deleted permanent records cannot be recovered.

To delete a permanent record

1. On the Home screen, click **Permanent Records**.
2. Select a student, and click **Delete**.
3. To confirm, click **Yes**.

6.4.4 Determine How Grades Should be Calculated on the Transcript

HeadMaster normally calculates grades (weighted or unweighted) on the transcript using the Average Terms method. If selected, HeadMaster adds each term's overall grade average and divides by the number of terms. If you want transcripts calculated using this method, because this is the default method used by HeadMaster, you don't need to make any changes to the permanent record options.

If permanent records are converted or transfer classes are brought in with blank averages, but they've been assigned a letter grade and/or a GPA, you can now fill in the averages using the Fill Blank Averages mass changes option. See Fill Blank Grade Averages to learn more.

Alternatively, you can select to calculate grades using the Average Classes method. HeadMaster adds the class grades taken for each term and divides by the number of grades to obtain the overall average or GPA (unweighted). If you want transcripts calculated using this method, you must change Permanent Record Options.

To average transcripts by classes

1. On the Home Screen, click **Options**.
2. Click **Permanent Records**.
3. Select **Average Classes**, and click **Close**. You can now update permanent records.

6.4.5 Edit a Student's Permanent Record

Before you update permanent records, determine and set up how you want grades to be calculated on the transcript. For more information, see Determine How Grades Should be Calculated on the Transcript (see page 57).

To print a list that contains information from several students' records, customize the grid view and then print it. See Work with Grids.

If you use multiple datasets, be aware that after you update permanent records, all permanent records can be viewed or printed from and across any dataset. For example, if Mr. Jones updates permanent records for his dataset that contains the lower school students, these records can be viewed or printed in his dataset containing upper school student records.

To edit a permanent record

1. On the Home screen, click **Permanent Records**.
2. Double-click the student's name.
3. To save changes you made to the permanent record information, click **OK**.

6.4.6 Update a Permanent Record

To keep permanent records current, use the Permanent Record Assistant to update student records.

This process creates a permanent record for each student and updates grade averages. Grade averages must be calculated by Calculate Course Grades before the update Permanent Record Assistant can be run.

To update permanent records

1. On the Home screen, click **Update Permanent Records**. The Update Permanent Records dialog box displays.
2. Select to update the entire database, a single student, a group of students, or an entire grade level. If you select Update a single student or a group of students, click **Select Students** to choose the records you want to update. If you select Update a range of grade levels, select a grade level from the drop-down list.
3. Select the start and end dates for the current school term.
4. Click **Next**.
5. Select one or more **Grading Periods**.
6. Click **Next**.
7. When the calculations are complete, click **OK**.

6.5 Update Transcripts

What do you want to do?

6.5.1 Add Semester or Quarter Grades, GPAs, and Credits

If your grading periods are composed of semesters or quarters, when you run Update Permanent Records, the semester or quarterly grades will automatically be added to the Semester/Quarter Grade dialog box. However, if you need to add historical information, for example, when a student transfers, you can do that on the Permanent Record Subjects tab. Add grades for each semester or quarter, letter grades, GPAs, and earned credits.

The Student Transcript Detail report will print semester/quarterly averages, while the Transcripts by Semester report will print both averages and credits.

To add a semester or quarter grade average

1. On the Home screen, click **Permanent Records**.
2. Double-click a student's name.
3. Click the **Transcript** tab.
4. Select a term from the Transcript Detail grid, and click **Edit**. The Permanent Record Term dialog box displays.
5. Select a class from the Term Subjects grid, and click **Edit**. The Permanent Record Subject dialog box displays.
6. On the Permanent Record Subject window, click **Add**. The Semester/Quarter dialog box displays.
7. To select the semester or quarter for which you are adding an overall grade, click the **Semester/Quarter** drop-down list.
8. Enter the grade average for the student. You can use numeric and letter grades.
9. If needed, add **GPA** and earned credit data. Denote incomplete terms, too, if applicable.
10. If applicable, enter a **GPA No Honors** value. This field is only visible if your school uses the AP/Honor Points feature set up in the **Options** > **Permanent Records** window.
11. Click **OK**.

6.5.2 Edit Transcript Information

Transcripts are the cumulative record of a student's school career. The transcript follows a student throughout their education and is used for gaining admittance to a college or university.

Several different types of information are included on student transcripts including graduation date, class rank, cumulative credits, cumulative GPA, and cumulative grade average. Also included are the details of the student's schooling, such as the classes taken during school terms and transfer information.

Information contained on the Transcript tab includes courses and grades that a student has taken at your school as well as courses and grades transferred from other schools. The tab is divided into two sections. The Transcript Summary area displays grade average and credit information for the current term. Previously calculated averages and credits are automatically updated when you run the Update Permanent Records Assistant (See Update Permanent Records (see page 55).). The Term Subjects area lists detailed information for each subject that the student completes.

> ⚠ **Note**
>
> Your school might calculate weighted averages. Here, briefly, is how weighting works:
>
> - Weighted calculation takes into account the Credits Earned and Credits Taken fields, while unweighted calculation uses the number of classes taken instead. Weighting is not the same as calculating averages based on AP or honors classes, described below.
>
> - If you are using the AP/Honors feature found in the Options > Permanent Records window, the field GPA No Honors is included in the Weighted and Unweighted boxes on the Transcript tab. The calculation made is exactly the same as that for weighted and unweighted, but does not assign additional points for AP or honors classes.

You can edit transcript information for a student's record as long as nothing has been entered in the Transcript Detail grid. Edit grade and credit transcript information throughout the student's record by updating it on the Subject detail tab.

To edit transcript information

1. On the Home screen, click **Permanent Records**.
2. Double-click a student name..
3. Click the **Transcript** tab.
4. Edit the information, and click **OK**..

The following fields are included in the Term Summary and are automatically calculated when you run the Update Permanent Records Assistant or when you enter Permanent Record Subjects.

Additional Field Information

Graduation Date

The student's expected graduation date. For example, 05/30/2015.

Class Rank

The student's relative position or standing within the class.

Active Term

The name of the active school term. For example, 2014 - 2015.

Overall Credits Earned

The cumulative number of credits a student has earned.

Overall Credits Taken

The cumulative number of credits a student has taken.

Overall GPA

The cumulative grade point average for the student.

Overall Average

The overall grade average for the student. For example:100.

Diploma Type

The type of diploma the student was working toward: business, technology, vocational, nursing, etc. For schools required to send transcripts electronically, this field might be required in the data export, but isn't required by HeadMaster.

Program of Study

The area of study the student was involved in. For schools required to send transcripts electronically, this field might be required in the data export, but isn't required by HeadMaster.

Administrative Hold

Indicate a hold on the transcript for this student due to unpaid fees, etc. The hold flag will be noted during the Update Permanent Records process.

6.5.3 Enter Transcript Information for a Transferring Students (Term Summary)

Each school term contains detailed information about the subjects that the student has taken. When you click the Transcript tab, the current term is summarized. Details for each school term are further summarized under Subject Detail. To view subject details, double-click a term name.

If the student transfers credits for subjects from another school, you can manually enter permanent record history for the student. You don't need to enter this information if the student is already in the HeadMaster system. It's automatically entered in the student's permanent record.

To enter transcript information for a transferring student

1. On the Home screen, click **Permanent Records**.
2. Double-click a student name.

3. Click the **Transcript** tab.

4. In the Transcript Detail grid, click **Add**. The Permanent Record Term dialog box displays.

5. Beside Term Subjects, click **Add**. The Permanent Record Subject window displays.

6. Enter the class name and course number.

7. Select a subject from the **Subject** drop-down list; or, if the student transferred in and took a subject not offered at your school, enter the name of the subject. Subjects entered in this field will be saved to the student record.

8. Enter the name of the teacher who taught the subject.

9. Enter the number of credits earned by the student for the subject.

10. Enter the number of credits taken.

11. Select one or more of the following options as they apply:
      - If this subject was transferred from another school, select the **Transferred** check box.
      - To calculate the subject as part of the grade point average, select **Include in GPA**.
      - To include this subject in the transcript calculations, select **Calculate on Transcript**.
      - To print this subject on the transcript, select **Print on Transcript**.

12. Click the **Department** list and select a department name, or enter the name of a department.

13. In GPA, enter the grade points earned for the subject.

14. In **Average**, enter the current grade average for this subject, then enter the equivalent Letter Grade.

15. **Optional**: Enter **Semester/Quarter Grades**. For more information, see Add Semester/Quarter Grades, GPAs, and Credits (see page 60).

16. Click **OK**.

6.5.4 Export Transcripts for XAP

With HeadMaster, you can export student transcripts in a format compatible for uploading into XAP™ Corporation's Transcript Exchange program.

Before you can export to XAP, make sure you complete the following required fields in each student's permanent record.

> ⓘ **Useful Information**
>
> Many of these fields automatically populate when you run Update Permanent Records.

On the Personal tab:

- Last Name
- First Name
- Middle Name
- Date of Birth
- SSN
- Address Line 1
- City
- State
- ZIP Code

- Phone Number

On the Transcript tab:

- Graduation Date
- Current Grade Level
- Diploma Type
- Program of Study

On the Transcript tab, under Transcript Detail, edit each term to include:

- Grade Level
- Term Year - Start Date
- Term Year - End Date
- Program of Study

In the Permanent Record Term window, under Term Subjects, edit each subject to include:

- Class
- Course Number
- Credits Earned
- Credits Taken
- Average

To export transcripts for XAP

1. On the Microsoft® Windows® toolbar, click **Start**.
2. Click **All Programs** > **HeadMaster** > **XAP Export**.
3. Select either **Preliminary** or **Final Export**.

> ℹ️ **Useful Information**
>
> If you select Preliminary, the following information is optional: graduation date and diploma type. Blank grades, blank term dates, and blank credits are also allowed with the Preliminary option.

4. Verify that your school's information is entered correctly.
5. Under Select which students to export, click **Select**.
6. Select the student records you want to export, and click **Add**.
7. Click **Close**.
8. Under Save file to following location, click **Lookup**.
9. Navigate to the location you want to save the export file, and click **Save**.
10. Click **Run**.

> ⚠️ **Note**
>
> When running a Final Export, if any of the required fields haven't been completed, a Listing of Errors displays. You can save this list for reference. You cannot complete the export until you correct the errors.

6.5.5 Print Transcripts

When students requests copies of their transcript, first verify their information is up-to-date.

Run the Update Permanent Records Assistant before printing transcripts. For more information, see Update Permanent Records (see page 55).

To print transcripts

1. On the Home screen, click **Reports**.
2. In the Report List, expand **Grades**.
3. Click a transcript report.
4. Select the report options. You can select a term under Available Terms, by clicking **Add**.
5. To specify a student, click **Select**, click the student's name, and click **Add**.
6. Click the **Additional** tab, located at the bottom of the window, and make your other selections.
7. On the toolbar, click **Print**.

6.5.6 Get Answers to Common Questions About Transcripts

The following is a list of frequently asked questions about transcripts:

What must be done before information will display on the transcripts?

You must run **Update Permanent Records** before information will display on the transcripts.

What do you need to check if a student transcript doesn't display after you run Update Permanent Records?

Verify the student is active.

What do you need to check if a class doesn't display on the transcripts or in permanent records?

Verify the class is active. On the class record, click the **Subjects** tab and ensure Ungraded check box is clear.

How can you display only the term you want on the Transcript?

Select **Reports**, **Grades**, **Student Transcript**, or **Student Transcript Detail**. Under Available Terms, select the term you want and move it to Selected Term.

What do you need to check if you preview the transcript and it displays a blank page?

On the **Additional** tab, verify if any information is in **Graduation Date**, **Overall Credits Earned, Overall GPA**, or **Overall Average**. If the graduation date is on the **Additional** tab but not on the student's record, no information will display.

Where should you check after you have run Update Permanent Records, but don't see a student term?

Select **Tools** > **Options** > **School Information** and see if a **Term Description** is entered.

When you go into Permanent Records and edit a term, for one class the box isn't selected to display or calculate on transcripts. What must you do so it'll display without editing each student's record?

On the Home screen, select **Classes**. Edit the class, and click the **Subjects** tab. Select the **Include in Transcript** check box. You'll need to refresh the class. To do so, click the **Subjects** tab then **Post Grades**. Then, on the toolbar, click **Refresh**. Close Post Grades and Classes. On the Home screen, click **Calculate Grades** then click **Update Permanent Records**.

What do you need to do if the Credit Earned displays for the year but needs to display for the semester?

Select **Classes**, and then edit the appropriate class. Click the **Subjects** tab. Under *Earn Credits Based On*, select **Semester/Quarter**. Click **Post Grades**, and then **Refresh**. On the Home screen, click **Calculate Grades** then click **Update Permanent Records**.

Under Permanent Records on the Transcript tab, where is the Transcript Summary information gathered from?

The Transcript Summary information is gathered from **Transcript Detail Information**.

Under Transcript Summary, is the class rank gathered from the system?

Yes.

What displays on the Transcript Summary?

The following displays on the Transcript Summary:

- **Graduation Date** — This pulls from the student record.
- **Class Rank** — This information is required.
- **Active Term** — This pulls form School Information.
- **Overall Credits Earned** — This is calculated from Permanent Records.
- **Overall Credits Taken** — This is calculated from Permanent Records.
- **Overall GPA** — This is calculated from Permanent Records.
- **Overall Average** — This is calculated from Permanent Records.