

Implement New School Year Procedures

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



Useful Information

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



Important Information

You must have performed your [promotions](#) to the new school year before implementing the new school year procedures.

Set up the School Information

The first procedure is setting up your term description.

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

Set Up Grading Period Dates

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

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

Upload HeadMaster Online Grading Period

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

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

Upload a New Data Set for HeadMaster Online

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

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

Enroll Prospective Students

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

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

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

Enter New Students

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

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

Assign Homeroom Teachers

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

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

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

Enroll Students in Classes

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

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

Set Up the School Calendar

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

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

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

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

Reset Lesson Plans

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

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

Enter New Teachers and Staff

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

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

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

Set Up the Lunch Calendar

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

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

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

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

Change Billing Code Amounts

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

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