

# School Administrator User Guide

Table of Contents	Page
Program License	2
Program Setup	3
System Requirements	3
Program Components	3
Program Security	4
Getting Started	5
Database Management	6
Component Info	
• School Info	7
• Attendance Info	9
• Grading Info	10
• Discipline Info	11
• Tuition Info	11
• Lunch Info	12
• Calendar Info	14
• After Care	14
Technical Support	16

## **School Administrator® License Agreement**

**IMPORTANT-READ CAREFULLY:** This LICENSE AGREEMENT is a legal agreement between you (either an individual or a single entity) and EduConnect, Inc. for the SOFTWARE PRODUCT identified above, which includes computer software and may include associated media, printed materials, and "online" or electronic documentation. By installing, copying, or otherwise using the SOFTWARE PRODUCT, you agree to be bound by the terms of this License Agreement. If you do not agree to the terms of this License Agreement, do not install or use the SOFTWARE PRODUCT.

### **SOFTWARE PRODUCT LICENSE**

The SOFTWARE PRODUCT is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The SOFTWARE PRODUCT is licensed, not sold.

1. **GRANT OF LICENSE.** You may install and use the SOFTWARE PRODUCT on a standalone computer or a computer on a Local Area Network which is limited to one building or site. You may not reproduce or distribute copies of this SOFTWARE PRODUCT for use at any other buildings or sites. The SOFTWARE PRODUCT is licensed as a single product. Its component parts may not be separated for use on more than one Local Area Network. If this is a Trial Version, you may only use this SOFTWARE PRODUCT for the length of the trial and, if you decide not to purchase the Registered Version, you must delete this SOFTWARE PRODUCT from your computer.

2. **COPYRIGHT.** All title and copyrights in and to the SOFTWARE PRODUCT (including but not limited to any images, photographs, animations, video, audio, music, text, and "applets" incorporated into the SOFTWARE PRODUCT), the accompanying printed materials, and any copies of the SOFTWARE PRODUCT are owned by EduConnect, Inc. The SOFTWARE PRODUCT is protected by copyright laws and international treaty provisions. Therefore, you must treat the SOFTWARE PRODUCT like any other copyrighted material except that you may install the SOFTWARE PRODUCT on a Local Area Network provided you keep the original solely for backup or archival purposes.

3. This LICENSE AGREEMENT is governed by the laws of the State of Kansas.

4. **DISCLAIMER OF WARRANTY.** EduConnect, Inc. expressly disclaims any warranty for the SOFTWARE PRODUCT. The SOFTWARE PRODUCT, accompanying files and any related documentation is provided "as is" without warranty of any kind, either express or implied, including, without limitation, the implied warranties or merchantability, fitness for a particular purpose, or noninfringement. The entire risk arising out of use or performance of the SOFTWARE PRODUCT remains with you.

5. **NO LIABILITY FOR DAMAGES.** In no event shall EduConnect, Inc. or its suppliers be liable for any damages whatsoever (including, without limitation, damages for loss of business profits, business interruption, loss of business information, or any other pecuniary loss) arising out of the use of or inability to use this SOFTWARE PRODUCT. THE LIABILITY OF THE SELLER WILL BE LIMITED EXCLUSIVELY TO PRODUCT REPLACEMENT OR REFUND OF PURCHASE PRICE.

## **Program Setup**

School Administrator is hosted on the EduK12 Online Community web site. The program is accessed through the User Login on the home page of the web site. Maintenance and updates are handled by EduConnect. The databases are backed up daily.

## **System Requirements**

You can access the School Administrator program from both Windows and Macintosh computers using a web browser.

## **Program Components**

Following is a summary of the modules in the School Administrator program.

### **School Info**

This module contains the database information for your families, students, teachers and classes. You can enter and view information for these items. You can view and print class lists, family, student and teacher lists, a school directory, mailing labels, birthday lists, permanent record cards, student pictures and student id cards. You can also export lists to Microsoft Excel or text files and send emails. You can also view reports on the demographics of the families, students and teachers.

### **Attendance**

This module tracks daily attendance for your students. You can set up custom absences, and track excused and unexcused absences and tardies. You can view class, student and daily attendance. A school attendance summary can be calculated that can be used for filling out state attendance reports. You can also identify students who have excessive absences or tardies and send them form letters. You can edit parts of the letter to include specific information for your school.

### **Grading**

This module can create Report Cards using letter grades, percentages or outcomes. You can also include custom report information. Teachers can enter final grades for report cards electronically. You can print report cards and transcript labels, check student failures and calculate grade point averages.

### **Discipline**

This module tracks student discipline incidents and prints discipline reports. You can view a school report with a summary of the discipline incidents for the year.

### **Tuition**

This module tracks tuition and fees. You can record tuition and fee payments and view tuition and fee payment information. You can also check overdue or unpaid tuition and fees and send form letters to families with overdue tuition. You can edit parts of the letter to include specific information for your school.

### **Lunch**

This module tracks lunch purchases and payments. You can view daily, weekly or monthly lunch reports. You can track those students who receive free or reduced lunch and calculate the statistics needed for federal lunch program reports. You can create lunch statements or letters for collecting advance payments. You can edit parts of the letter to include specific information for your school.

## **After Care**

This module tracks morning/afternoon care attendance. You can record attendance, fees and fee payments and view fee payment information. You can also check fees and send form letters or statements to families. You can edit parts of the letter to include specific information for your school.

## **Calendar**

This module allows you to create public and private calendars and daily announcements. You can view the calendars online or print the calendars by month for school wide distribution.

## **Reports**

The Reports module accumulates all of the various reports from each module onto one page.

## **Program Security**

Program security is controlled by setting up program accounts with User IDs and Passwords. There are eight levels of users that can be set up.

- System Administrator: This level allows full access to all functions of the program
- Finance Administrator: This level allows full access to all functions of the program except for control of program accounts.
- Program Administrator: This level allows full access to all functions of the program except for control of program accounts and access to tuition information.
- Teacher: This level allows teachers access to teacher gradebooks, to view certain family and student information, submit attendance and grades for their classes, view calendar information and daily announcements, and set up personal web pages.
- Lunch Administrator: This level allows a cafeteria administrator to enter or change lunch payments and lunch purchases, enter menu information, view lunch payment info, check payment balances, and print lunch statements and letters.
- Lunch User: This level allows a cafeteria employee to enter or change lunch purchases and enter menu information.
- Nurse: This level allows the nurse to access family and student information, enter medical information and enter attendance.
- Counselor: This level allows the counselor to access family and student information and view teacher gradebooks.
- Staff: This level is for office personnel or guest workers. It only allows access to some family and student information and can enter attendance.
- After Care: This level is for office personnel or guest workers. It only allows access to some family and student information and can enter attendance.

A default program administrator account is provided for accessing the program. This can be changed as desired after accessing the program the first time. Program accounts are setup from the School Info module. Go to Enter School Info - Enter/Change Program Account to setup these accounts.

## Getting Started

Once you have accessed the School Administrator program, you should begin entering data for your school. The actions for each module can be found in the Program Menu page or in the Menu bar at the top of each page. Following are the steps you should take to begin entering data for the first time. You should begin by setting up the general options for each module that you will use. In the school module, you should enter the Report Period End Dates for this year. In the Attendance module go to Set Attendance Options, in the Grading module go to Set Report Card Options, then to Enter School Grading Info, in the Tuition module go to Enter School Tuition Info and in the Lunch module go to Begin Year Lunch Duties.

The next step is to enter information about your teachers. This action can be found under the Enter Teacher & Class Info link in the School module. You should enter information about each of your grade level teachers. If you don't have a teacher for a grade, enter a generic teacher for that grade, such as 1st Grade Teacher. Later, you can go back and change that name with the specific information for the teacher hired. As you set up the Teachers, you can also add Program Accounts for them so they can access the School Administrator Program from computers in their classroom, if your school is networked. You can also set up Program Accounts at a later time from the Enter Program Account link, which can be found under the Enter School Info link. (For information on how to access the School Administrator program from other computers, go to Program Access).

After entering the information about your teachers, you should enter information for your grade level classes, which can also be found under the Enter Teacher & Class Info link. If you have more than one class at a grade level, give each class a unique name, such as 1A and 1B for two first grade classes. As you set up the class, you will assign the Teacher for that class. The grade level classes will be used to collect Attendance information for the students.

The next step is to Add New Families & Students, which can be found under the Enter Family & Student Information link. As you add students for each family, you will assign the students to a grade and a grade level class. If you do not assign students to a grade level class, their Active status will be set to False and they will not be included in the data for this year. (For more information on the meaning of the Active status for Families and Students, go to School Info).

After adding your families & students, you can set up additional classes for your school. These would include specialized classes, such as music or art, and departmentalized classes for your upper grades, such as Science or Math. You must set up classes for all of the subjects at each grade level in order to enter grades and print report cards. After setting up these classes, you should add students to these classes. This action can be found under the Enter Teacher & Class Info link.

## Database Management

Microsoft Access databases are used to store the information for your school. The School Administrator program is designed so that users can interact with the database through their web browsers without the need to know how to set up or maintain the databases themselves.

### Program Databases

Following are the databases included in the program.

Information	Database
Program Registration Information	Registration.mdb
Program Accounts	Accounts.mdb
School Info, Attendance & Discipline	SchoolAdmin.mdb
Grading	Grading.mdb
Tuition & After Care	Tuition.mdb
Lunch	Lunch.mdb
Calendar & Daily Announcements	Calendar.mdb
Student Archives	StudentArchives.mdb

Each database contains a number of tables in which information is stored. Much of the information is interrelated. Users enter and view information in these tables through the forms in the pages of the School Administrator program.

### Backing Up Databases

A backup of each year's databases are created when the End of Year Duties are performed. Information from previous years can then be accessed by the Choose a Different School Year link in the Other Actions section of the School Info module.

## PROGRAM COMPONENTS

### School Info

#### Setting up Custom Fields

There are many default fields for entering data. You can view the fields the first time you enter data for your students, families and teachers. You can also set up 6 custom fields each for student, family and teacher. Click on the Setup Custom Fields link in the Enter School Data Section to enter these field names.

#### Add New Family & Students

When adding new families and students, you can enter in as much information as desired. Additional information can be added later by going to Change Family or Change Student information.

If you are adding a new family for the following year's enrollment, check the box at the bottom of the form. This will set the families Active status to false so they will not be included in this year's information. Each family will be assigned a numerical ID. The number of students enrolled for that family must be entered. Students can only be assigned to one family with one home address. So, for families that have divorced parents with joint custody or other situations where students may reside in more than one place, you will have to decide who will be the official mailing address.

Once you submit the family information, the Add New Student will automatically appear. Each student is assigned a six-digit random ID. If you do not assign the student to a grade level class, the program assumes the student is being enrolled for the next school year and the student's Active status is set to False. After submitting the Add New Student form, the form will continue to repeat based on the number of students to be enrolled that was entered on the Add New Family form.

Once you have entered the family, you can add new students to that family by going to Add New Student to Current Family.

#### Adding a Second Family

In those cases where a student is living with one parent, but the other parent wants to be included in school mailings, etc., you can add a second family by clicking on Add 2nd Family in the Enter Family & Student Info section.

#### Active Status

The Active Status of families and students is an important factor in how School Administrator handles processing their data. Families with an Active status of True are considered to be in good standing with students enrolled for the current year. They are included when requesting any family information for any module. Families with an Active status of False are either not in good standing, for example, because of non-payment of tuition, or they do not have any students enrolled for the current year. Student with an Active status of True are considered to be in good standing and currently enrolled. Students with an Active status of False are not in good standing or they are enrolled for the next school year.

**Important: Families and students who leave school during the school year should not be deleted from the database.** This will cause inaccuracies in the attendance, lunch, and grade calculations. Their Active status should be set to false. When a student is removed from their homeroom class this will set their Active status to false. Students who leave school during the school year should be deleted from their classes so they do not continue to show up on the class list.

## Teacher and Class Info

New teacher info is set up from the Enter/Change Teacher/Staff Info link. Every teacher should be set up with an account so they can log in to the system. An email address must be entered in order for teachers to be able to retrieve a password if they forget it. Changes to current teacher information can be made by clicking the EDIT link in front of the teacher's name in the list on the right.

Go to enter Enter/Change Class Info to set up the classes. Homeroom classes should be set up to record attendance. Check the box to enter attendance for those classes. Each homeroom class should have a unique name. You can also set up additional classes for your school. These would include specialized classes, such as music or art, and departmentalized classes for your upper grades, such as Science or Math. **You only need to set up other classes if the classes do not have the same students enrolled as the Homeroom class.** After setting up these classes, you should add students to these classes. This action can be found under the Enter Teacher & Class Info section.

## Student, Teacher & Room Schedules

In order to generate student & teacher schedules, the period for each class must be entered. In addition, the time of day and days of the week for the class may also be entered to give more details on the schedules. To generate a room schedule, the room assignment for each class must also be entered.

## Sending Email

Email can be sent to various groups from the Other Actions section in School Administrator. You can attach documents prior to creating the email. The online editor allows you to use various fonts, sizes, and colors in the email. You can also use a template formatted for newsletters by going to Insert - Templates in the editor menu.

This program has also been designed to work with images that you upload to Dropbox.com. To use this functionality, you need to set up an account at Dropbox.com. Once an account is created, you can upload your images to that account. **(Although Dropbox wants you to install Dropbox on your computer so you can sync files to your Dropbox account, it is not necessary to do that if you just want to upload images to Dropbox.)** Images should not be larger than 600 pixels wide in order to fit on the newsletter. If you have a picture from a camera, you will need to edit that picture in an Image Editor such as Microsoft Paint and shrink the size before uploading it. Once you've uploaded an image to your Dropbox account, go to Files in your dashboard. Click on Share for the image, then click on Copy link. That will copy the link to the image to your computer's clipboard. To insert the image into the editor, click the image icon in the editor's toolbar. Paste the image link into the source field. **IMPORTANT: You will then need to change the address of the link by replacing [www.dropbox.com](http://www.dropbox.com) with [dl.dropboxusercontent.com](http://dl.dropboxusercontent.com). Leave the rest of the link address as it is.** The click OK to insert the image into the editor. If you done this correctly, the image should appear. If needed, you can resize the image by clicking on it and then grabbing one of the corner boxes and moving it.

## End Year & Begin Year Duties

Prior to doing the End of Year Duties you need to Enroll Students for Next Year from the link in the middle section of the School Info module. This will allow the program to promote the students to the next grade level when you do the End of Year Duties. Do not delete any families or students until after you've done the End of Year Duties. If you use the Lunch module to track purchases and payments, run the Lunch Balances Report in the Lunch Module and make a hard copy of that report. Once the school year has ended, simply go to End Of Year Duties in the Other Actions section of the School Info module and click the Perform Actions button. This will create backup databases of this year's information, automatically delete your graduating students and put them in the Student Archive file, clear out the Attendance and Class Information, clear the Lunch Balances and carry over any amounts to the new year, and move the next year's Tuition Information to the new school year. After doing the End Year Duties, follow each step in the Begin Year Duties list to set up the new school year.



## View Info vs. Print Info

The View Family, Student or Teacher info links are for viewing information for individual families, students or teachers. The Print Family, Student or Teacher Info links are more appropriate for printing hard copies of information for multiple families, students or teachers.

## School Reports

You can view reports on the demographics of your families, students or teachers. These reports will provide summaries or a detailed listing of various categories. Family demographics include parish/non parish, parental status, number of children enrolled in school and language spoken at home. Student demographics include sex, race, free & reduced Lunch, Title I eligibility and Special Education eligibility. Teacher demographics include full time equivalent, sex, race, degree & certificate and years of experience.

## Attendance Info

This program will keep track of daily attendance. It will not keep track of period by period attendance. The default categories for recording Attendance are Present, Absent Full Day, Absent Half Day or Tardy. You can add a custom attendance item by going to Set Attendance Options in the Attendance module. You can also set up to record absences and tardies as excused or unexcused.

Daily attendance can be entered for the entire school by a secretary who accesses the program through a Program Administrator login. If teachers have computers in their rooms that are on a school wide network, they can enter their own attendance. When teachers login with their account, they will only see their classes when entering attendance. Attendance information can be corrected later that day by the office if a student's attendance information needs to be changed. If teachers are entering their own attendance, the Program Administrator can check on class attendance entry for any day to make sure all of the classes have been entered. **Important: Attendance must be entered for all classes each day even if all students are present.**

Comments can be entered for students marked absent or tardy. These comments will appear in the daily attendance report. Types of comments that can be entered could be the time a student should report to the office if leaving early or where homework should be sent for absent students.

When attendance is entered, the information is recorded in three tables. The Daily Attendance records any students who are marked Absent or Tardy and any comments entered for those students. The Class Attendance table records the dates attendance is entered for each class. The Summary Attendance table keeps track of the students' date started, date left and the date an excessive absence or tardy letter is sent home. The Date Started and Date Left can be entered through the Edit Summary Attendance link. **Important: If a student leaves during the year, their active status should be set to False, but they should not be deleted until after the school year has ended. Setting a student's active status to False automatically enters that day's date in the Date Left field.**

You can also check for excessive absences and tardies based on any number you enter and send a form letter home to those students' families who exceed that number. The letters will be printed in English or Spanish depending on the Language spoken at home entered for the family in the School Info module. You can edit parts of the letter to include information specific to your school.

## Attendance Reports

**Daily Attendance Report** - This report shows absences and tardies for the date chosen. Comments entered when attendance is submitted will appear in the daily attendance report. Types of comments that can be entered could be the time a student should report to the office if leaving early or where homework should be sent for absent students.

**School Attendance Report** - This report calculates summary attendance data for the dates selected for the school. The data can be identified by sex, race, free & reduced lunch, Title 1 or Special Education criteria. It can be sorted by the entire school or by grade. This report will produce the information that need to be submitted for many state attendance reports. **Important: Before using this report, make sure that all students have the correct Date started entered, and, if a student left during the year, has the correct Date left entered. These can be checked by going to Edit Summary Attendance in the Attendance module.**

**Class Attendance Report** - This report shows the number of absences & tardies for students in the selected class between the two dates entered.

**Student Attendance Report** - This report shows detailed attendance information for the selected students.

**Perfect Attendance Report** - Identifies those students who have missed up to the number of days specified in the report.

## Grading Info

This module is used to create report cards for your school. Report Cards can be a standard letter grade report card or outcomes base. Two custom fields can also be set up to include in the Report Card. Before you can start entering grades, you will need to complete your school's information regarding how the report cards will be setup. Go to Enter Report Card Options to set the options for the information that will appear on the Report Cards. **Report cards can be custom designed for your school.**

If you want to include a school logo on the report card, send the logo to [techsupport@educonnect.com](mailto:techsupport@educonnect.com)

### School Grading Info

You must enter the following information about your school.

- The type and number of grading periods, i.e. semester or trimester with the number of grade periods in each: This information will have been entered the first time you accessed the program.
- The end dates for each grade period: This information is required to process the attendance data that will be displayed on the report card.
- The type of grade reporting for each grade in your school, i.e. Letter Grades or Outcomes
- Comments: There is space for comments on both the Letter Grade and Outcomes report cards. On Outcomes report cards, two comments can be entered for each student each report period. On Letter Grade report cards, two comments can be entered for each subject each report card. The Comments will always reflect the last comments selected.

The following information is optional and will be displayed on letter grade report cards only if submitted.

- School Grading Scale: This information is required if you want to produce a Student Grade Point Report.
- Custom Fields, such as Conduct, Effort, Instructional Level, etc.

You will need to enter the following information if you have any grade that issue Outcomes based report cards.

- Outcomes Codes: codes for the meaning of each Outcome grade, e.g. M - Mastered Outcome, S - Satisfactory Progress, N - Needs Improvement
- Grade Level Outcomes; the outcomes for each subject at each grade level. These can be entered by either a Program Administrator or by regular Users.

## Entering and Viewing Grades

When teachers login, they will see only the classes they teach to enter grades. For grades that are self-contained, the teacher will need to enter each subject for which grades will be entered. For specialized or departmentalized classes, the class name will be the subject for which grades will be entered. Individual student grades can also be changed by a Program Administrator through the Enter/Change Student Grades link.

The View Student Grades link allows you to view individual student grades for all subjects for all grade periods. The View Class Grades link allows you to view class grades for specific subjects for all grade periods.

## Report Card Reports

**Student Grade Point Report:** This report allows you to calculate grade points and rankings for each student.

## End Year Duties

Completing the End Year Duties will create a backup of the current year grades and then clear all grades for the new school year.

## Discipline Info

In this module you can enter and view student discipline incidents. You can also print out Student Discipline Reports to be sent to parents.

The School Discipline Report allows you to view discipline incidents by type either with a summary of the number of incidents or as a detailed report with student names.

## Tuition Info

### Entering School & Family Tuition Info

The Tuition module allows you to track your families' tuition and fee payments. The first thing you must do is to Enter School Tuition and Fee Information. Next, you will enter the Family Tuition Info for the year. Family Tuition for Elementary and Preschool should be set up as separate accounts.

The program will initially show payment figures for each family based on the school tuition info you have entered. You can change the Tuition Owed as needed. **You should not deduct financial aid or fundraiser deduction from the Tuition Owed.** It will be deducted from the tuition amount by the program automatically. The program will calculate the payment amounts for each family based on the Pay Schedule selected.

If Monthly is selected as the Payment Schedule, the program will calculate the monthly payment based on the number of monthly payments entered in the School Tuition form. If a family enrolls after the beginning of the year, you should select Other as the Payment Schedule and then enter the number of payments that family will make through the rest of the year.

### Recording Tuition & Fee Payments

Tuition and fee payments are recorded by family. The tuition and fee information can be viewed from the View Family Tuition and Fee Info link. Tuition payments for Elementary and Preschool should be recorded separately.

## **Importing FACTS/SMART Tuition Payments**

In order to properly import FACTS Tuition payments to School Administrator, you must use the Family ID set up for the family in School Administrator as the Student ID provided to FACTS for each family.

## **Tuition Statements, Invoices & Letters**

Once you have entered family tuition information, you can print Tuition and Fee Statements or for your families that will include the payment amount based on the type of schedule of payments for that family. The Tuition and Fee Statements will be updated monthly by the program to indicate any overdue amounts based on the type of pay schedule and the payments made for each family.

You can also send a Tuition & Fee Invoices. The invoice shows the total amounts owed and payments for the family and gives the balance remaining to be paid.

You can also Send Tuition Letters to families with overdue tuition or with unpaid balances at the end of the year. The letters will be updated by the program monthly to indicate the most current tuition information. The letters will be printed in English or Spanish depending on the Language spoken at home entered for the family in the School Info module. You can edit parts of the letters to include specific information for your school.

## **Tuition Reports**

The following reports are available in the Tuition module.

- Tuition & Fee Payment Report: This report will show those families who made tuition or fee payments between the dates selected. It can be used to reconcile daily deposit slips.
- Tuition & Fee Summary: This report will give a summary of all tuition & fee amounts owed and the total payments for each item by family.
- Tuition Balances Report: This report gives tuition balance information for individual families. The information that can be selected to include is payment schedule, payment amount, total owed, total paid, last payment amount & date and the amount due.
- Individual Fee Balance Report: This report shows the balances for individual fees owed by family.
- Family Tuition Demographics: This report gives demographic information on tuition for families. Categories that can be selected include Pay Schedule, Fundraising Deduction and Financial. Information can be viewed as a school summary or with individual family details.

## **End Year Duties**

The End Year Duties will create a backup and then delete the current year tuition information and transfer any tuition information for the next year to the current year to begin the new school year.

## **Lunch Info**

### **Entering School Lunch/Breakfast Info**

The Lunch module allows you to track your families lunch payments and purchases. Lunch payments can only be recorded and viewed by a Program Administrator.

You can set up a Lunch program accounts for your cafeteria personnel from the Enter Lunch Program Account link, if there is a computer available for them to use on the school network. Lunch Program Accounts can be set up to enter school lunch costs, record or correct purchases, enter lunch menus and view daily lunch requests. If the cafeteria doesn't have a computer available on the school network, you can print a Lunch Purchase Spreadsheet to record purchases manually and enter them on a computer at a later time.

## Enter Lunch Options

The first thing you should do is to Enter the Lunch Options. These options allow you to set what type of lunch information is to be offered.

There are 5 lunch types, two extra entree fields, individual milk fields, and a breakfast field for those schools that serve breakfast.

You can also set how you want to record lunch requests and record lunch purchases. By default, the program records a total number of lunches requested and a generic lunch purchase. You can choose to record individual student lunch requests and specific lunch purchases by type of lunch.

You can also set an option to view lunch balances under a certain amount the first time the System Administrator or Lunch Administrator opens the program each day in order to print letters or send emails to those families whose account is below the balance entered.

After entering the lunch options, you should Enter School Lunch Costs.

## Setting Up Outside Vendors

If your school orders lunches from outside vendors, you should set up the Vendor information from the Enter Outside Vendor Information link in the Begin New Year Duties section. You can enter the Vendor name and up to 5 lunches and associated costs for each vendor. **You should also enter generic names for each lunch up to the maximum number of choices for the outside vendors from the Enter Lunch Options link.**

Once the above information is set up enter the dates lunch is served from the Enter Lunch Dates link.

## Setting Up Advance Lunch Orders

You can also have the option to allow advance lunch orders. First you should enter the earliest number of days prior to the lunch date that orders can be made and the latest number of days prior to the lunch date that changes can be made from the Advance Lunch Order section in the Enter Lunch Options screen.

Advance orders can then be placed from the Submit Family/Teacher Advance Lunch Orders link.

**Important: Placing an advance order charges the lunch purchases to the family/teacher account.**

With the complete Web Site Solution, you can allow families to submit their own advance lunch orders. This option is enabled from the Enable Web Site Info screen in the Web Administrator menu.

## Daily Lunch Requests

Teachers can submit daily lunch requests from their computers to give the cafeteria an idea of the number of lunches to prepare each day. Program Administrators and Users can also submit daily lunch requests for students and staff.

## Recording Lunch Payments and Purchases

Lunch payments can be recorded for families, teachers/staff, other adults and guests. When recording Lunch Payments, you can choose to record them as for Student Lunches, Adult Lunches or Individual Milk Payments. These choices are given to meet the guidelines for the Free & Reduced Lunch Program and reporting payments.

Lunch and breakfast purchases can be recorded for students, teachers/staff, other adults and guests. Individual purchases are recorded for students and teachers/staff. Lunch and breakfast purchases for the other adults and guest categories are recorded as totals for each day. The student purchases are debited to the student's family lunch payments and reflected in the Lunch Payment Info for each family. The costs of the purchases are automatically calculated based on the School Lunch Cost information entered previously.

When recording purchases, the student's status for Free & Reduced status is recorded based on the student information entered in the School Info module. If a family's status changes during the school year, it is important that their students' status be changed from the Change Current Student Info link in the School Info module. Lunch purchases are set up to be recorded by sorting by grade, as it is assumed that is how students are sent to lunch.

### **Lunch/Breakfast Menus**

Lunch and Breakfast menus can be entered each day from the Enter Lunch/Breakfast menus link.

### **Lunch Statements & Letters**

Once you have entered lunch payments and purchases, you can print Lunch Statements or for your families which will include the payment amount for the next month based on the number of days lunch will be served that month. The Lunch Statements will be updated monthly by the program to indicate the amount due based on the projected purchases for the next month and the current lunch balance for each family.

You can also check lunch balances and send letters or emails to families with information on the current amount owed based on recorded payments and purchases and the projected purchases for the next month. The letters or emails will be printed in English or Spanish depending on the Language spoken at home entered for the family in the School Info module. The letters can be edited to include information specific for your school.

### **Lunch Reports**

The following reports are available in the Lunch module.

- Daily Report: This report gives a summary or individual details of lunches and milks purchased for the selected date.
- Lunch Payment Report: This report shows the total payments for each family for the dates selected. It can be used to reconcile daily deposits.
- Lunch Balances Report: This report shows the total payments, purchases and balances for each family for the year-to-date.
- Lunches Served Report: This report shows the lunches served between the dates selected. The information in this report can be used to fill out state reports for the free and reduced lunch program.
- Student Lunches Served Report: This report shows lunch purchases for each student by day in a format that can be exported to Excel.

### **End Year Duties**

The End Year Duties will make a backup of the current year lunch information. The program will then calculate any balances remaining from the current year and transfer that balance to the new year.

## Calendar & Daily Announcements Info

### Calendar Info

You can create public and private calendars with this module. Public calendars can be viewed by anyone who has access to the home page for your school's Intranet. Private calendars can be viewed by Program Administrators or Users through the School Administrator.

There are two default categories set up for the calendars: the General Info, Public and the Faculty Info, Private category. These categories cannot be changed or deleted. You can create as many other public and private categories as you desire from the Add, Edit or Delete Calendar Categories link. Categories can only be added or edited by Program Administrators.

Calendar events can be added by Program Administrators or Users. The author of each event added will be the user name of the person logged in to the program. The author can only add or edit events that he/she originally created.

Using the Print Calendar, you can print a calendar that can be used for monthly distribution or to create your school calendar for the year.

### Daily Announcements Info

Administrators can create daily announcements that can viewed by the Faculty and Staff on their main menu page once they log in to the program.

## After Care Info

With the After Care module you can record morning/afternoon care attendance, fees, and payments. You can send statements, letters, or emails to families regarding their current fees and payments.

### Enter Info

Enter After Care Options - Here you will enter how you want to record attendance and fees. You can record attendance and fees by family or individual student. Once you select one of these options, you should not change it during the school year. You can also choose to record check in and check out times and whether to record the individual who checks out the student. If you choose to record check out times a parent can check out the student using their email address in the form identified in the After Care Options screen.

Record/Check In After Care Attendance - Use this form to record the attendance and fees for each day of morning/after care.

Change/Check Out After Care Attendance - Use this form for a staff member to change or check out for each day of morning/after care. The staff member who will be assigned as the check out individual is the person who is signed in to the system.

After Care Family Daily Checkout - use this form for a parent to check out their student.

Record Individual Payments - record payments for individual families.

Record Batch Payments - record payments for multiple families.

Record Registration/Monthly Fee - **record registration fees for after care or record monthly fees for families in lieu of charging daily fees.**

Correct Payments - Make changes to previously recorded payments.

### **View Info**

View Family and Student Info - you can view information, including medical information about families and students.

View Family Payment Info - View attendance, fees and payments for individual families.

### **Print Info**

Print/Email Account Statements - print or email account statements for families.

Print/Email Tax Statements - print or email tax statements that show payments and fees for a specific time period or year.

### **Other Actions**

Check Account Balances/Send letter or email - check the balances for family accounts and send them a letter or email regarding their current account information.

Edit After Care Letters - edit the content of the letters sent to families regarding their account balances

### **Reports**

After Care Daily Attendance/Charges Report - view attendance and charges for After Care for individual days.

After Care Payment Report - View payments made by families for a designated time period.

After Care Balances Report - view family balances for After Care.

## **Technical Support**

Go to Customer Support Online at <https://eduk12.net/techsupport.aspx>

Email: [techsupport@educonnect.com](mailto:techsupport@educonnect.com)

Phone: 913-384-6701