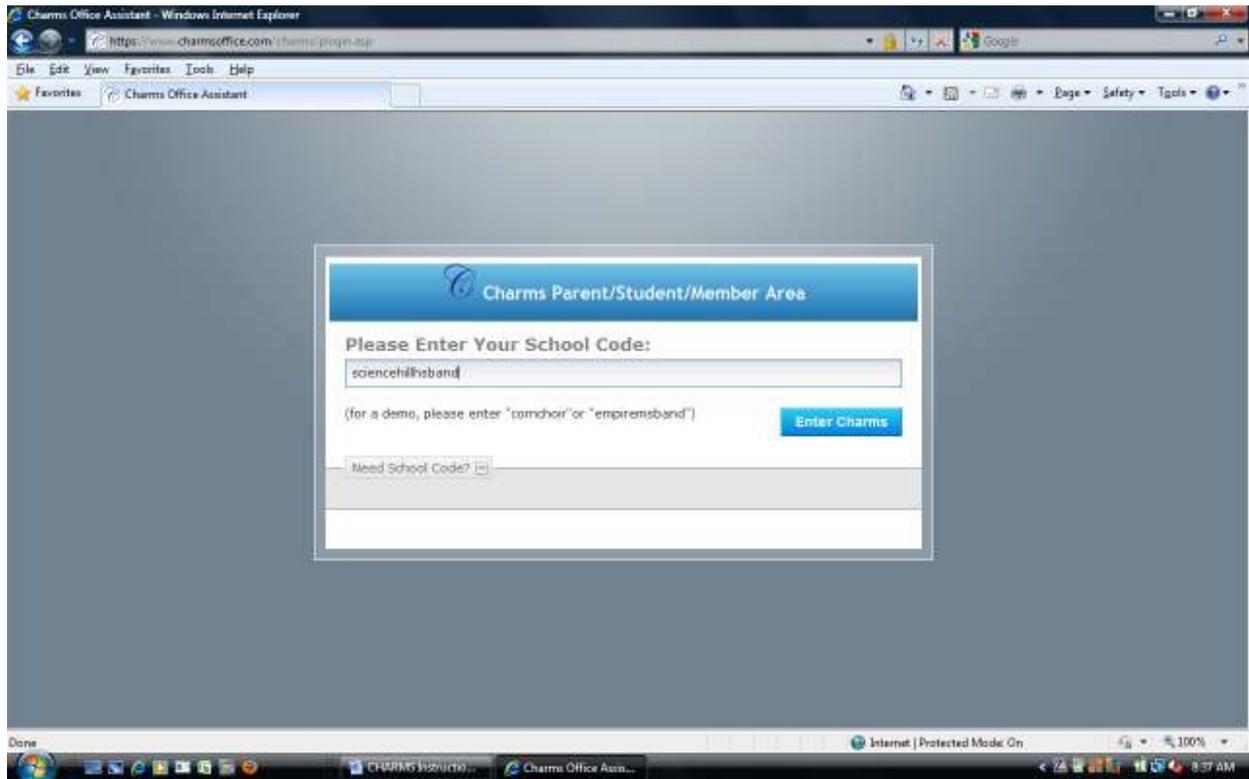


CHARMS Instructions for SHHS Band Parents

Begin by going to www.charmsoffice.com. Roll over "ENTER" in the upper right corner, then click "Parents-Students-Members" in the drop-down menu that will appear.

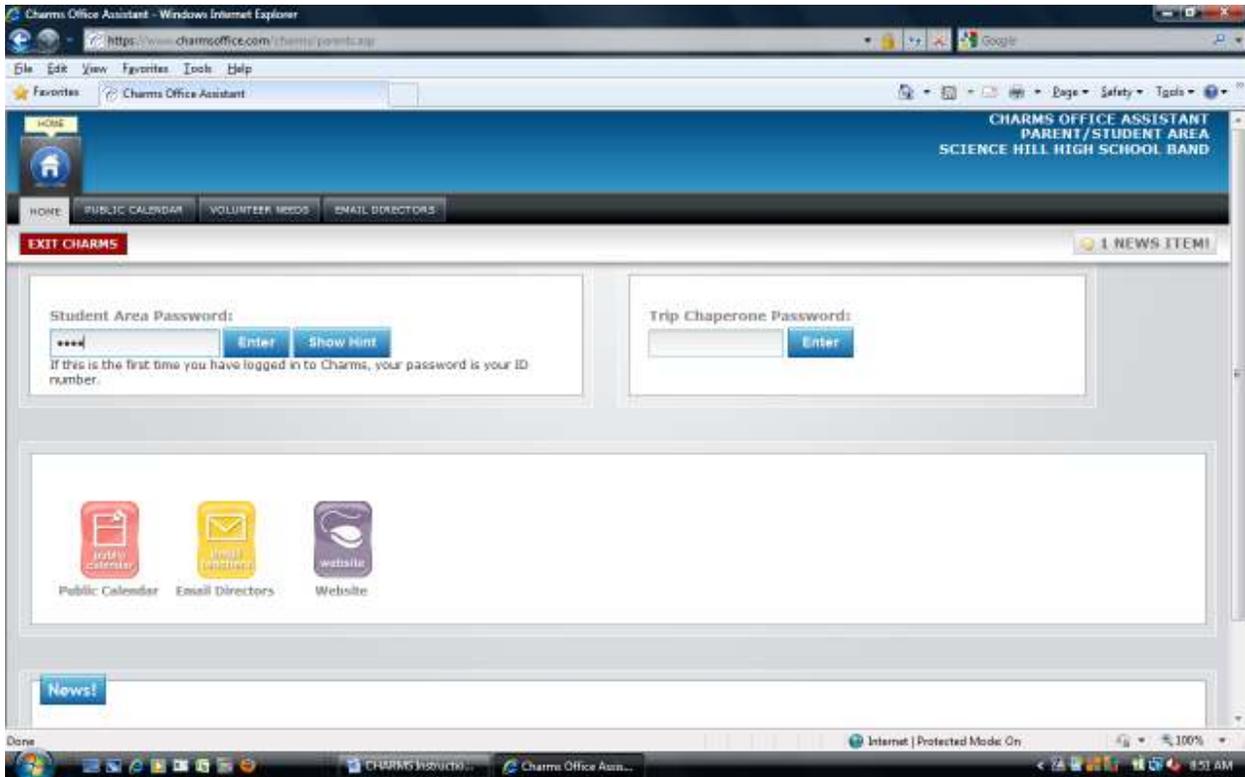


On the next screen, enter *sciencehillhsband* as the school code, then click the “Enter Charms” button.



On the next page there is a link to your student's individual information, which is password protected. From there you can also see links to the band calendar (which mirrors the calendar on the booster website), the booster website itself, and links to email the band directors and Rhonda Simmons, who is our CHARMS database administrator. In addition, there is a "News" area where information will be posted from time to time.

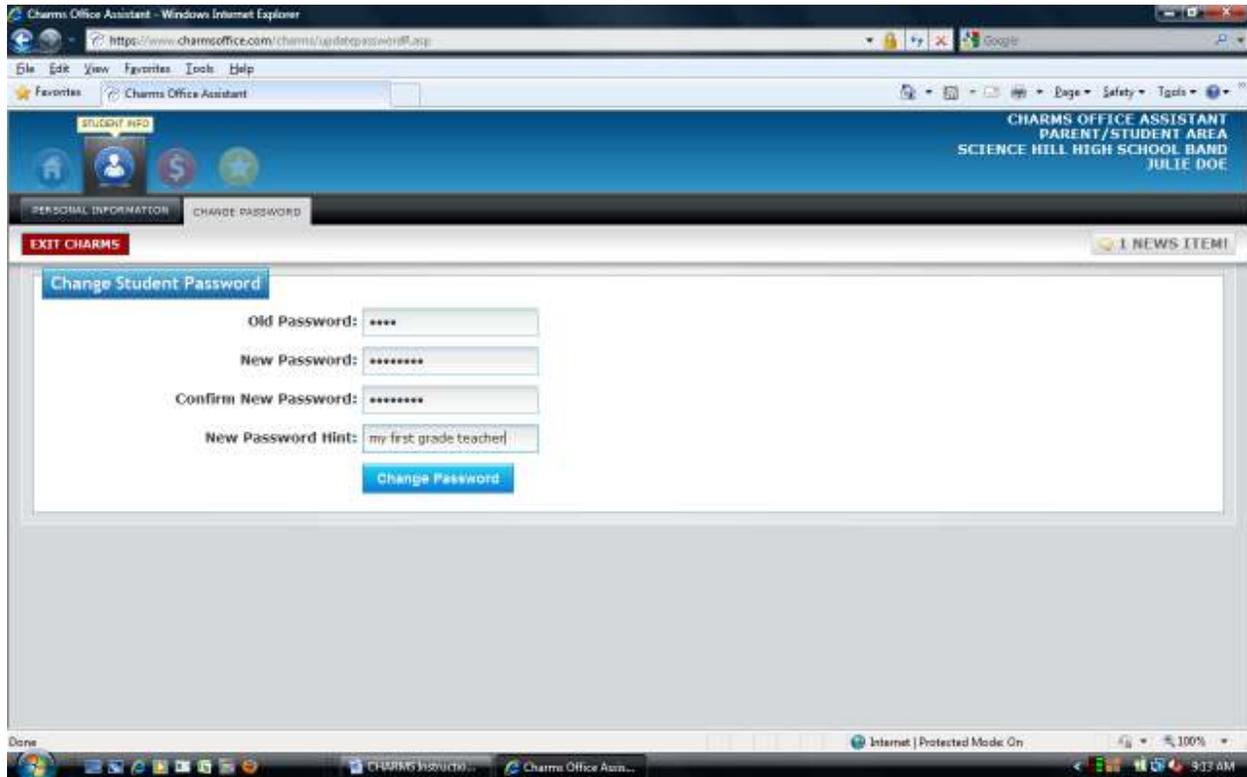
To log into your student's account for the first time, enter the password that was provided to you. If you need to receive the password again, request it from the database administrator at shhsbanddatabase@gmail.com.



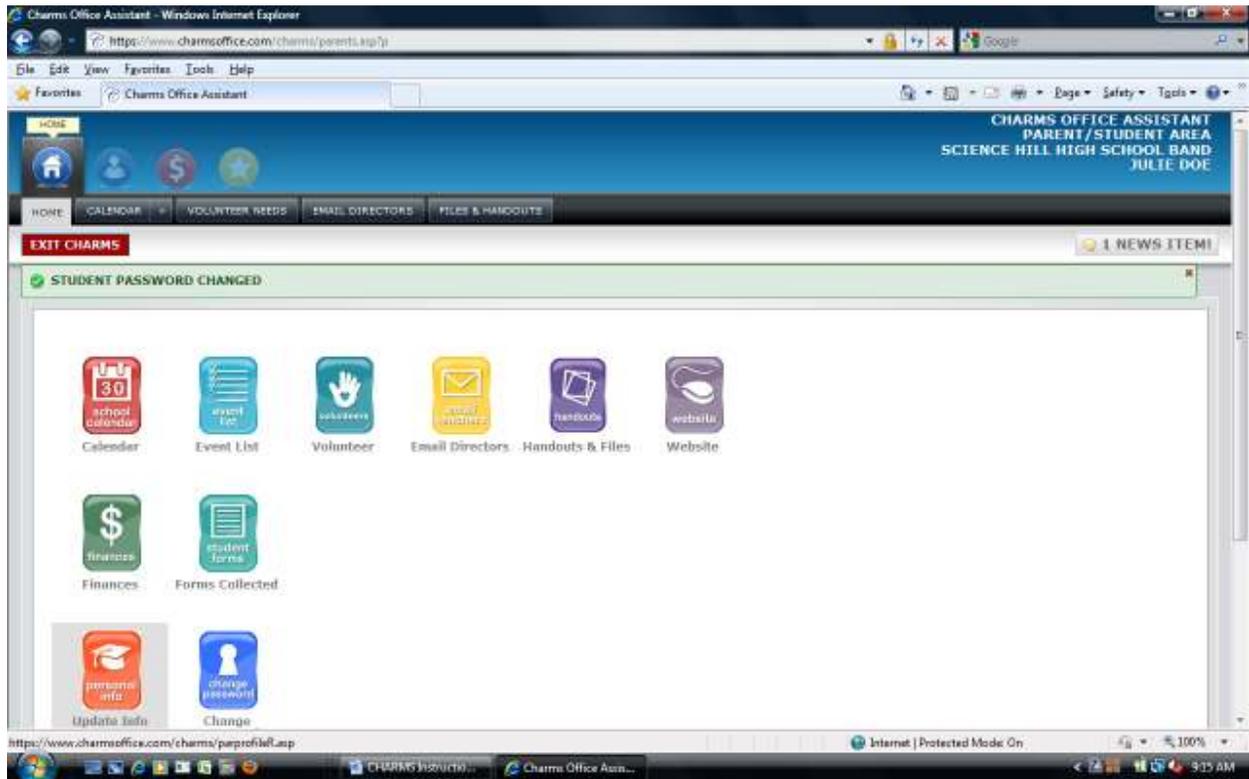
The next screen you see will be the home page for the student information area. The first thing you should do is click on the “Change Password” button.



Your student's password is the key to keeping personal and student account information private, so change it to something that is not easily guessed and create a hint to help you remember it. The new password must have at least six characters. Use this new password for all future logins.



After you change the password, you will be taken back to the home page. Next, click on the “Personal Info” button.



Here you will find a screen for your student's personal information. The information already there will be minimal, unless your child has a sibling in the band whose information we have copied. Fill in or correct the information, keeping in mind the following:

- We normally do not call students' cell phones. However, on some occasions, such as when the band is traveling, we may need to contact a particular student. In those circumstances it is very helpful to be able to call or text that student or one of his/her friends.
- The band does not use lockers. Leave the locker combination blank.
- Primary group, other groups, and instrument/part information fields are filled in by the band directors. Don't worry about these for now. However, if you see on a later visit that the information is incorrect, notify one of the band directors via the email link provided on the home screen.
- The "Known As" field is for the name that your child uses in everyday life, whether it be the first name, middle name, or a variation thereof.
- Complete the "Emer Contact 1" and "Emer Contact 2" fields with the names and phone numbers of emergency contacts other than parents. You have only 30 characters available to complete these fields, so you may have to get creative to get all the information in. Format doesn't matter for these two fields.

When completed, the screen should look something like this:

The screenshot shows a web browser window with the URL <https://www.charmsoffice.com/charms/paper/default.asp>. The page title is "Update Student Detail - Julie Doe". The form is titled "Julie's Information" and contains the following fields:

Student ID	DoeJ			Sex	M
First Name	Julie			Locker	Combination
Middle Name	Ann			Birthdate	5/15/2007
Last Name	Doe			Primary Group	none
Address	123 Happy Lane			Other Groups	
City, St Zip	Johnson City	TN	37604	Instrument/Part:	Instrument 1: Not Assigned Instrument 2: Not Assigned Instrument 3: Not Assigned
Phone	(423) 555-1234	Cell	(423) 555-9876	Known As	Julie
Cell Carrier	Verizon			Emer Contact 1	
E-mail	drumstar@myemail.com			Emer Contact 2	

At the bottom of the form, there are navigation buttons: "John Doe's Information" and "Add New Adult". A green "Update" button is located in the top right corner of the form area. The browser's taskbar at the bottom shows the system clock as 10:01 AM.

Click the "Update" button to save your work. You will see confirmation that the information has been updated.

Update Student Detail - Julie Doe Update

STUDENT INFORMATION UPDATED

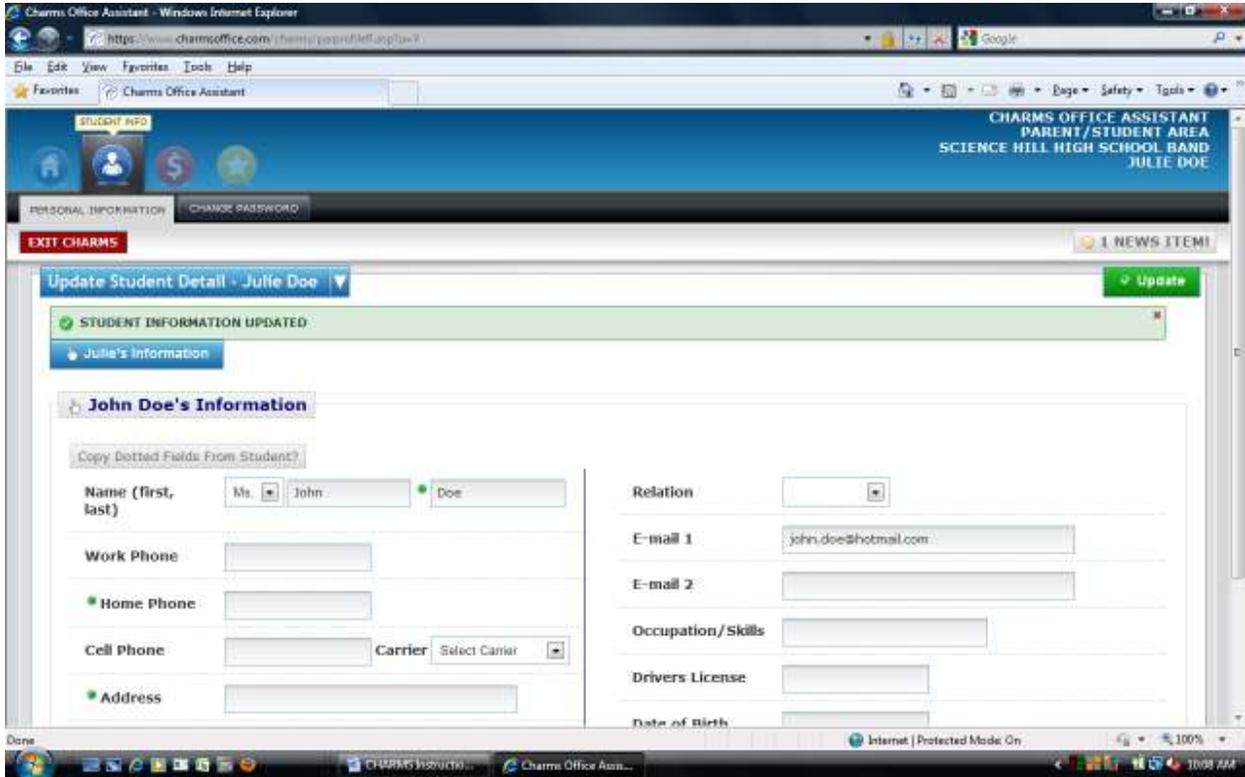
Julie's Information

Student ID	DoeJ	Sex	M
First Name	Julie	Locker	Combination
Middle Name	Ann	Birthdate	5/15/2007
Last Name	Doe	Primary Group	none
Address	123 Happy Lane		
City, St Zip	Johnson City TN 37604	Other Groups	
Phone	(423) 555-1234 Cell (423) 555-9876	Instrument/Part:	Instrument 1: Not Assigned Instrument 2: Not Assigned Instrument 3: Not Assigned
Cell Carrier	Select Carrier	Known As	Julie
E-mail	dhumstar@myemail.com	Emer Contact 1	
		Emer Contact 2	

John Doe's Information

Internet | Protected Mode On 100% 10:07 AM

Next, update parent information. If a parent's name is already in the system, there will be a button for it at the bottom left of the screen; in this case "John Doe's Information." If there is no parent's name in the system, you will instead see "Add New Adult." In either case, click on the button provided.



Fill in or correct the information requested, noting the following:

- You can quickly enter the last name, home phone, and address by clicking "Copy Dotted Fields from Student?" If only one field, such as the adult's last name, is different, it's easy to populate the fields by clicking the button, then correcting the one item that differs.
- It is especially important that we have your cell phone number; this is the number that appears on the mobile version of CHARMS and thus is the first number that we will call if there is an emergency.
- Tell us the relationship of the adult to the child; when we are in touch with you it is very helpful to know who you are!
- The Occupation/Skills box is a place where you can tell us things you know how to do that you might be willing to share with the band if needed.
- We do not use the driver's license or adult date of birth fields; just leave them blank.

The completed page should look something like this:

Charms Office Assistant - Windows Internet Explorer
https://www.charmsoffice.com/charms/page/def.asp?u=7

EXIT CHARMS 1 NEWS ITEM!

Update Student Detail - Julie Doe Update

STUDENT INFORMATION UPDATED

Julie's Information

John Doe's Information

Copy Dotted Fields From Student?

Name (first, last) [M] John Doe

Work Phone (423) 555-2345

Home Phone (423) 555-1234

Cell Phone (423) 555-8787 Carrier Verizon

Address 123 Happy Lane

City, St Zip Johnson City TN 37004

Relation Father

E-mail 1 john.doe@yahoo.com

E-mail 2 jdoe@bands.org

Occupation/Skills sales/photography

Drivers License

Date of Birth

Add New Adult

Internet | Protected Mode On 100% 10:38 AM

Save your work using the “Update” button. You will be taken back to the student’s screen.

Charms Office Assistant - Windows Internet Explorer
https://www.charmsoffice.com/charms/page/def.asp?u=7

STUDENT INFORMATION UPDATED

Julie's Information

Student ID DoeJ

First Name Julie

Middle Name Ann

Last Name Doe

Address 123 Happy Lane

City, St Zip Johnson City TN 37604

Phone (423) 555-1234 Cell (423) 555-9876

Cell Carrier Select Carrier

E-mail dnumstar@myemail.com

Sex M

Locker | Combination

Birthdate 5/19/2007

Primary Group none

Other Groups

Instrument/Part: Instrument 1: Not Assigned Instrument 2: Not Assigned Instrument 3: Not Assigned

Known As Julie

Emer Contact 1

Emer Contact 2

John Doe's Information

Add New Adult

Internet | Protected Mode On 100% 10:37 AM

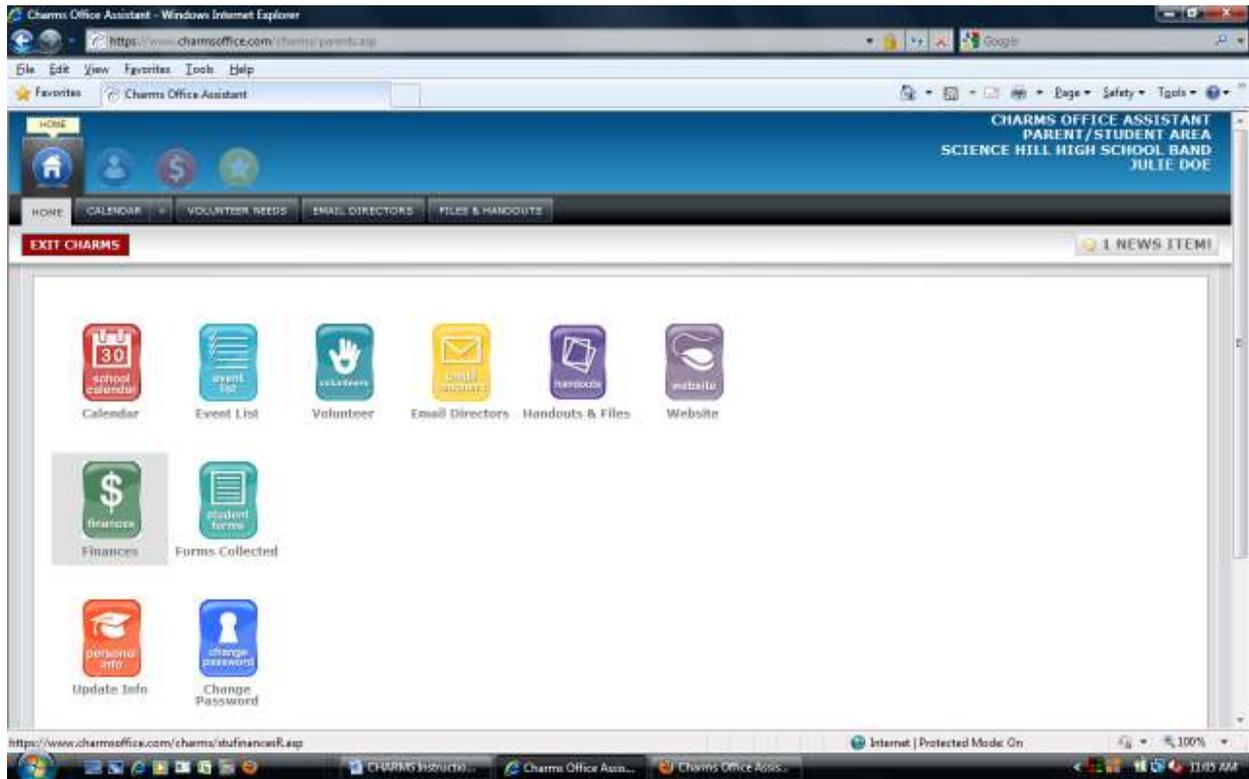
Repeat this process for the student's other parent, guardian, step-parent, or other responsible adult, until all have been entered.

The screenshot shows a web browser window displaying the 'Charms Office Assistant' application. The page title is 'Julie's Information'. The form is divided into two columns. The left column contains fields for Student ID (Doe.J), First Name (Julie), Middle Name (Ann), Last Name (Doe), Address (123 Happy Lane), City, St, Zip (Johnson City, TN, 37504), Phone (423) 555-1234, Cell (423) 555-9876, Cell Carrier (Select Carrier), and E-mail (dnumstar@myemail.com). The right column contains fields for Sex (M), Locker (Combination), Birthdate (5/15/2007), Primary Group (none), Other Groups, Instrument/Part (Instrument 1: Not Assigned, Instrument 2: Not Assigned, Instrument 3: Not Assigned), Known As (Julie), Emer Contact 1, and Emer Contact 2. At the bottom left, there are navigation buttons: 'Jane Doe's Information', 'John Doe's Information', and 'Add New Adult'. The browser's address bar shows 'https://www.charmsoffice.com/charms/page/def.asp?ia=7'. The taskbar at the bottom shows 'Done', 'Internet | Protected Mode On', and the time '10:38 AM'.

Student ID	Doe.J	Sex	M
First Name	Julie	Locker	Combination
Middle Name	Ann	Birthdate	5/15/2007
Last Name	Doe	Primary Group	none
Address	123 Happy Lane	Other Groups	
City, St, Zip	Johnson City, TN, 37504	Instrument/Part	Instrument 1: Not Assigned Instrument 2: Not Assigned Instrument 3: Not Assigned
Phone	(423) 555-1234	Cell	(423) 555-9876
Cell Carrier	Select Carrier	Known As	Julie
E-mail	dnumstar@myemail.com	Emer Contact 1	
		Emer Contact 2	

This completes the personal information setup, but you can update it any time you wish.

Next, return to the home page and follow the “Finances” link.



Here you will find a statement of your student's band account.

The screenshot shows the Charms Office Assistant website interface. At the top right, it identifies the user as Julie Doe, a parent/student at Science Hill High School Band. The main content area is titled "Student Financial Statement" and contains the following summary table:

Trip Ledger Balance Credit	0.00
Fixed Payments Due	50.00
Fundraising Balance Credit	0.00
Miscellaneous Balance Credit	10.00
TOTAL BALANCE DUE	\$ 40.00

Below the summary, it states "There are no scheduled trips for this student". A section titled "Student Fixed Payment Detail" provides the following information:

Paid Date	Item	Amt.	Paid By	Dept. Name
5/20/2011	Band Camp Deposit 2011	50.00	bfr	bfr
not paid	Stick and Mallet Fee 2011 (1)	50.00		
Total Fixed Payments Due		\$ 100.00		
Total Fixed Payments Paid		\$ 50.00		
Total Unpaid Fixed Payments		\$ 50.00		

The top section of the statement contains a summary of the financial categories. Julie is not registered for a trip, so her trip balance is \$0.00. Fixed payments represent fees, for which she owes \$50.00. The fundraising balance shows a credit of \$0.00, and she has a miscellaneous credit balance of \$10.00. The total balance due on her account is \$40.00, made up of her \$50.00 fee less her \$10.00 miscellaneous credit. Detail for these appear lower on the page, with the fee section visible here. Julie has been charged two fees – one for the band camp deposit, and one for her stick and mallet fee (she is a percussionist). Her band camp deposit has been paid using money transferred from another area of her account, which will be visible below. However, she still owes the stick and mallet fee.

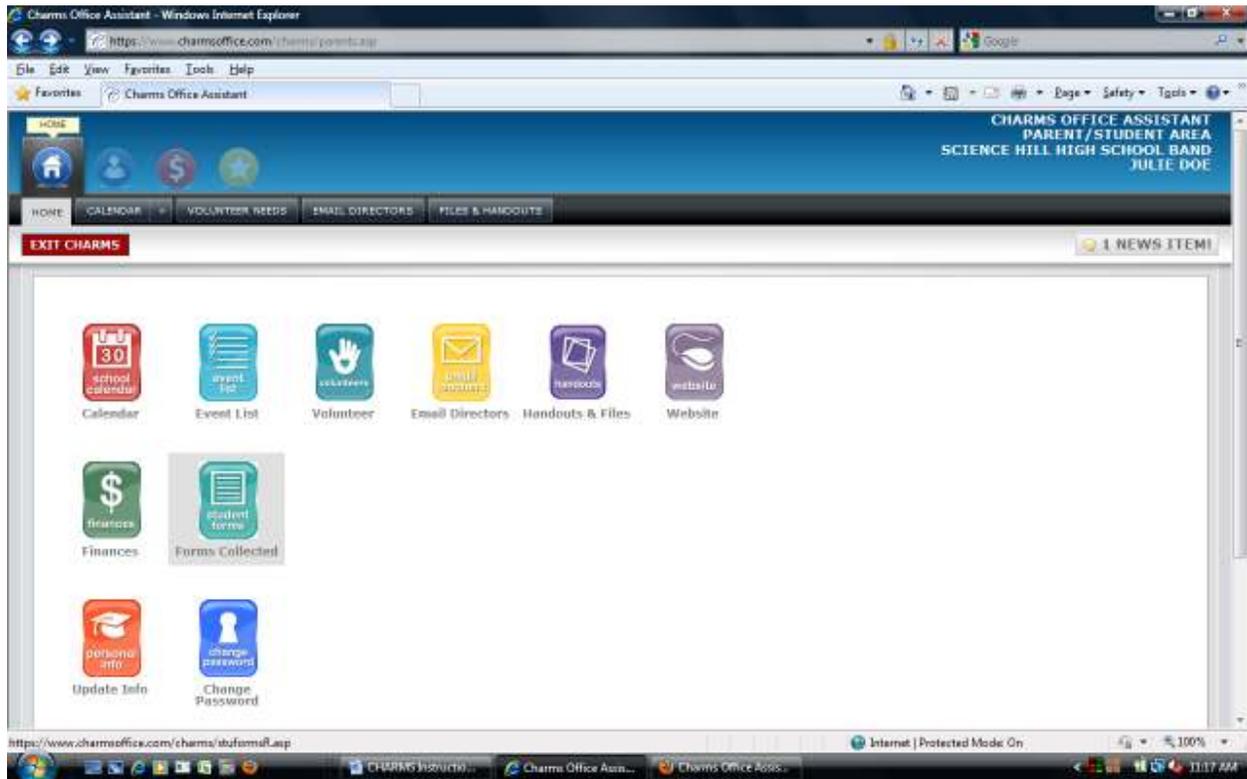
Trans Date	Activity	Value Given	Amt Applied	Amt Profit	Profit To	Paid By
5/20/2011	Kroger Cares Example	0.00	0.00	60.00	Stu Misc Ledger	N/A
Totals		0.00	0.00	60.00		
Fundraising Balance		0.00	0.00	60.00		

Date	Notes	Amt	Paid By	Dep. Num	Paid To	From
5/20/2011	Fundraising: Kroger Cares Example	60.00	N/A	0520	N/A	FR
5/20/2011	Txfer to fpas - Band Camp Deposit 2011	-50.00	bfr	bfr		F
Total		10.00				

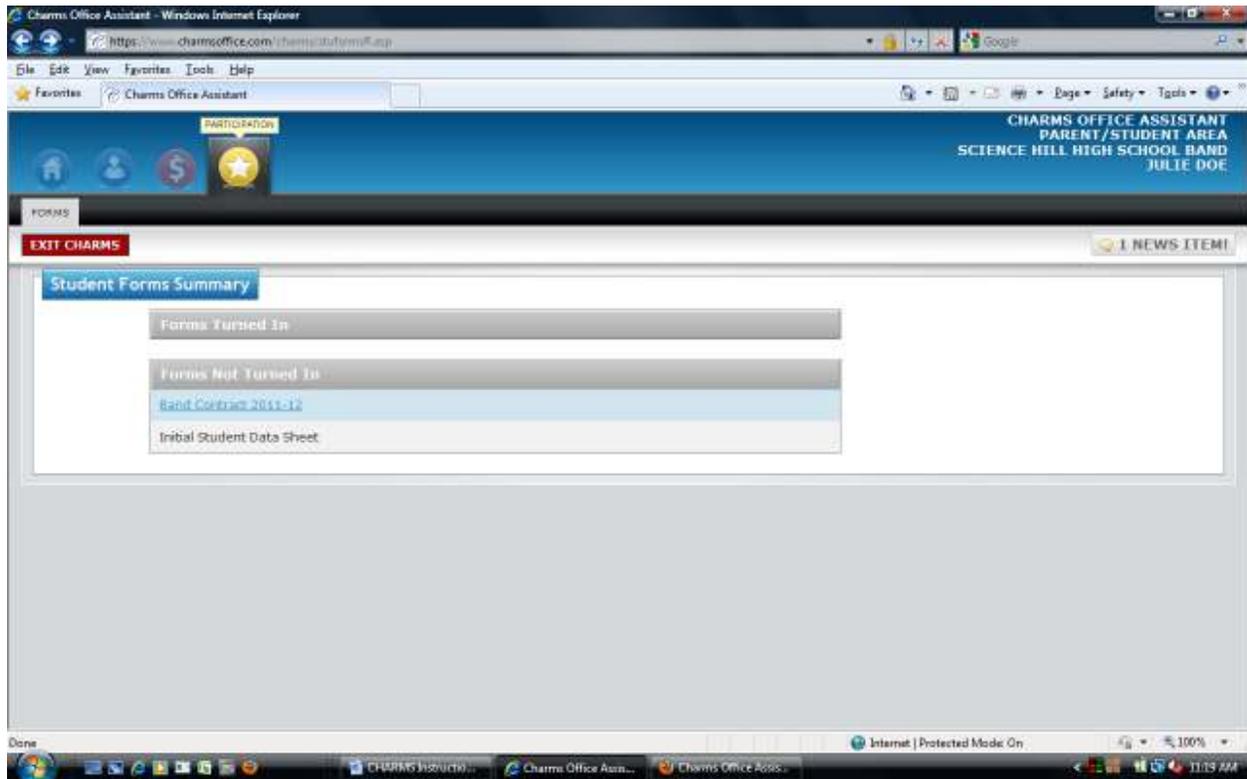
The remaining financial detail can be seen lower on the screen. Julie's family participated in the Kroger Cares program and received \$60 from it in May. The \$60 was all profit, and was posted to her miscellaneous ledger for use against her expenses. Then, \$50 was transferred from her miscellaneous ledger to pay her band camp deposit. She doesn't have enough money in her account yet to pay the stick and mallet fee, so it will remain open until she gets more either by fundraising or making a payment.

Student account transactions are posted every time a bank deposit is made, about once per week during the band's busy seasons. If you have questions about the account, contact the database administrator. We do not issue paper statements except in unusual circumstances.

When you have finished reviewing the financial detail, return to the home screen and click on “Forms Collected.”



Here you will find a record of forms that the student has or has not turned in.

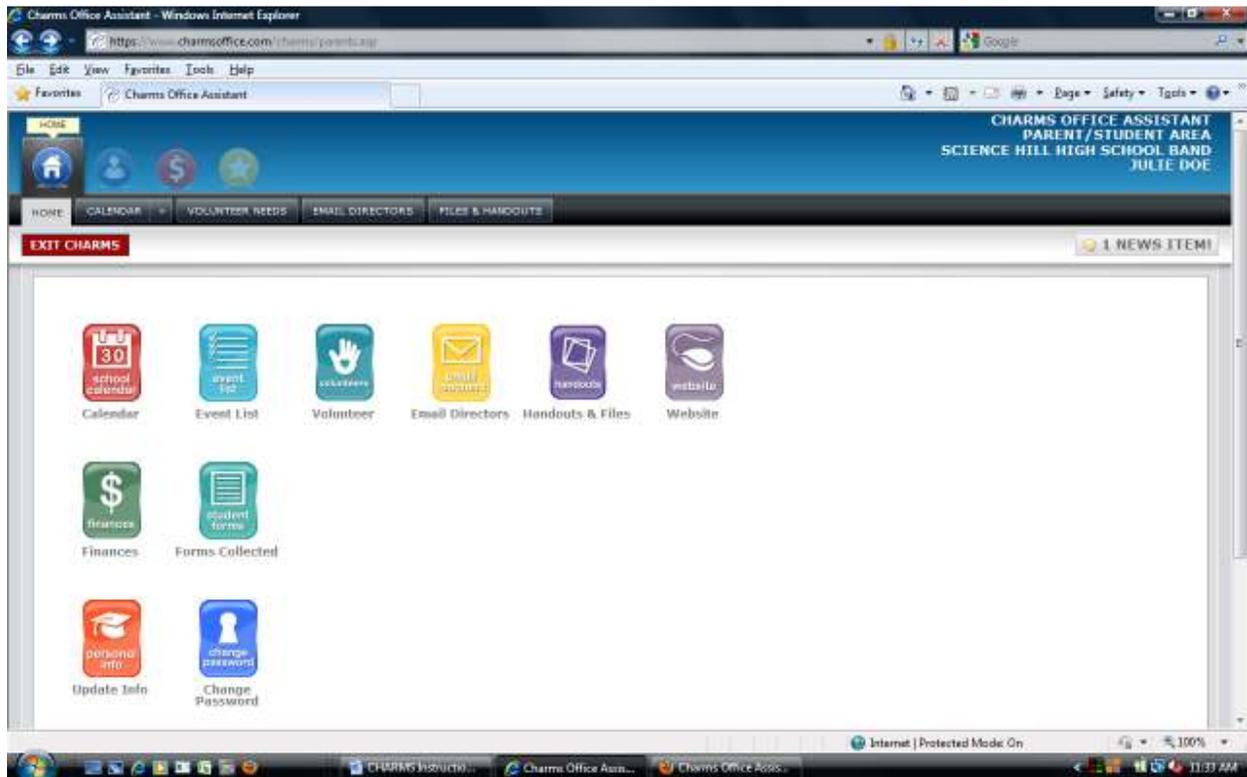


Julie has not turned in her band contract or her initial student data sheet, so her parents should ask her about them. An active link in this list means that the form can be downloaded directly from CHARMS.

This is a lot of information, so here's a list of things you should have done by now:

- Change student password
- Input/Update information for student and parents
- Review account statement
- Check on forms collected

After you finished these items, return to the home page and try the other links. Note, though, that the "Event List" and "Volunteer" areas currently are not in use - CHARMS is new to us and we are bringing parts of it online one at a time.



Give us feedback, too! We are still learning the system and are interested in both the good things and any problems that you may see.