

# Master Agreements



- It looks like we haven't added screenshots to this manual yet. Don't worry, we'll have some helpful visual aids soon!
- This manual is Pending Update, and its content may change often over the coming weeks. Check back often!

## I. Creating Master Agreements

Note: You must create the classes for the semester (or full year) for the student first.

- Step 1. From your roster, open the student's folder.
- Step 2. Click on Reports
- Step 3. If your school has defaults set, click set from defaults.
- Step 4. Make sure the information in the Time, Day, and Location fields are correct.
- Step 5. Set the Start and Finish dates for the term you are working with.
- Step 6. Click Print or Archive Master Agreement.

Note: This document must be signed by the Student, a parent/guardian, and the Primary Teacher.

## II. Archiving Master Agreements

- Step 1. Follow steps 1-5 under I. Creating Master Agreements
- Step 2. Click Archive Master Agreement.
  - The Master Agreement document will open.
- Step 3. Sign the document with your mouse in the appropriate box.
- Step 4. Have the Student and Parent/guardian sign the document. If they are present, have them sign with their mouse. If they are not present, type their email into the Invite email address field located under the appropriate box for each individual.
- Step 5. Click Send Invitation(s) / Submit Agreement
  - If emails are entered, this document is automatically emailed to students, parent/guardians, or any additional staff with a link to sign.
  - The signer will click the link in the email to be taken to the document.
- Step 6. The signer will scroll through the document and identify requested signature boxes (they will be marked with Sign Here Post-it notes).
- Step 7. They will type their name in the box, sign with the mouse, and click Send Invitation(s) / Submit Agreement.
- Step 8. Once all parties have signed and submitted, you will receive an email asking you to finalize the document by clicking on the appropriate link.

- Step 9. Review the document for complete signatures and click the submit agreement button at the bottom of the page.

Note: You can view MAs in Teachers>Compliance>Archive

### **III. Copying Courses to the Next Reporting Period**

- Step 1. Click the blue arrow on the PLS/Student Roster next to Set Copy MA Mode.
- Step 2. In the box that pops up, make sure all the fields are correct and click Set CC Settings.

Note: Clicking the question mark on that box will give you on screen instructions.

- Step 3. Open the folder of the student you want to work with by clicking the blue arrow on their folder.
- Step 4. Click the green plus icons in their folder to change them to red x's on classes and curriculum you do not want to copy. If you want to copy all classes and curriculum, leave all the green plus icons. (You can cycle back by clicking on the icon again.)
- Step 5. Click the Perform CC at the top of the page.
- Step 6. On this page, make any changes desired to the classes, then type CONFIRM into the box and click Copy ALL Courses.

Note: If you don't CONFIRM, the copy will not be performed.

### **IV. Full Year Master Agreements**

- Step 1. Create your classes for Fall Semester.
- Step 2. Copy and update classes to Spring Semester.
- Step 3. Open the folder of the student you want to create the Full Year Master Agreement for and click Reports.
- Step 4. Click Master Agreement
- Step 5. Click Set from Defaults if your school has defaults set. If defaults are not set, put your settings in.
- Step 6. Make sure to have the correct information in the Time, Day, and Location fields.
- Step 7. Set the date parameters from the first day of school to the last day of school.
- Step 8. Just below Select Reporting Period, select Print as Full Year.
- Step 9. Click Print or Archive Master Agreement

Note: This document must be signed by the Student, parent/guardian, and the Primary Teacher.

### **V. Mass Printing Master Agreements**

- Step 1. From the PLS/Student Roster, open a student folder.
- Step 2. Click the Reports tab>Reports>Mass Print Master Agreements.
- Step 3. Enter the start and finish dates of the school year.
- Step 4. Check any students or check all.
- Step 5. Select Set to Term in the Time Period section.

- Step 6. Select to Include All students or just the students without contract term.
- Step 7. Click Preview Selected MAs
- Step 8. Click Print MAs

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