

## How to access parent/student information in

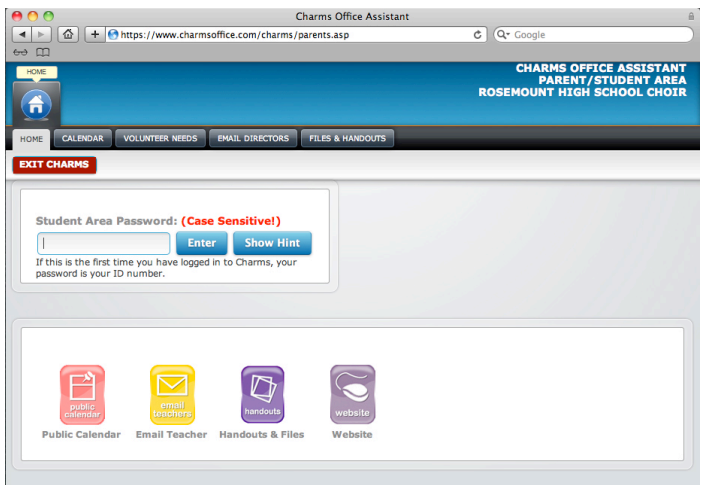


**CHARMS** is an online management system used by performing arts programs all over the nation. Among other things, Charms allows teachers and directors to keep track of financial records and other information for their students. Parents and students can log on from home and see their financial records, update their contact information, and more.

- A. Go to [www.charmsoffice.com](http://www.charmsoffice.com) and click the “ENTER” link at upper right.
- B. Find the “PARENT/STUDENT/MEMBERS LOGIN” section of the web page.
- C. Log into the RHS Choir program account using our School Code, ***RosemountHSChoir.***  
This will bring up the main page:

- D. From the main page you can view our **public calendar, event list, handouts** and other files.

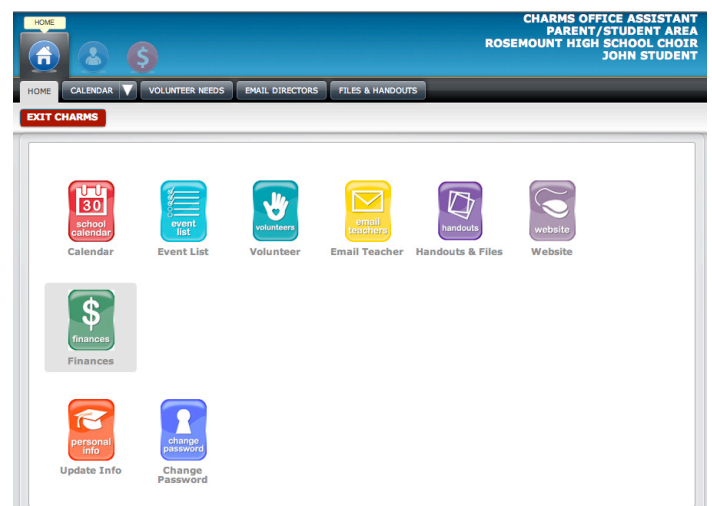
- a. Clicking on a **calendar** event reveals the details for that event, such as times, attendance requirements and equipment/uniform necessities.
- b. The **event list** puts all the calendar information in list format for easy printing.
- c. NOTE: If an event is assigned to some students and not to others, it may not show up on the public calendar. So you should always check the calendar on the **Student Area** page (see below).



- E. Students and parents can access the **Student Area** by entering the student’s RHS Student ID number in the box labeled “Student Area Password.” After logging in, the student’s name appears in the upper right corner.

- a. In the Student Area there are links to the calendar, individual student’s financial records and contact information, etc.
- b. You can update **Personal Information** (click on the **Personal Info** icon) on the student information page, including phone numbers and email addresses for the student and parent(s)/guardian(s). You can also add another parent/guardian contact.

**C. PLEASE NOTE THAT ANY UPDATES OR CHANGES YOU MAKE HERE ARE ONLY RECORDED IN THE CHARMS SYSTEM. TO UPDATE YOUR CONTACT INFORMATION WITH RHS YOU MUST CONTACT THE SCHOOL DIRECTLY.**



- If desired, students can change their passwords by clicking on the **Change Password** icon.
- Click the **Finances** icon to see the student's financial records for the current year, including fundraising profits, donations, payments, receipts, and more. You can also request a funds transfer to pay for trips, fees, etc. All of this is explained in the next section, **"More About Finances."**

## More About Finances

When you click on the Finances icon, a screen appears with a blue heading, "Student Financial Statement." On this page you may see up to four different ledgers:

- Trip Ledger**
- Student Fixed Payments**
- Student Fundraising**
- Student Miscellaneous Ledger**

A. Together, the ledgers show:

- the accumulation of funds in a student's account (from fundraising, payments, donations, etc.)
- the outward flow of funds for things like trip payments, class fees, contest entry fees, apparel purchases, etc.

B. The top section, directly below the blue box labeled **Student Financial Statement**, summarizes the balance of all four ledgers.

C. Numbers in **red** indicate a **negative** balance – that is, the total amount currently owed for trip payments or fees.

D. Numbers in **green** indicate a **positive/non-negative** balance – that is, the amount accrued (accumulated) through fundraising, donations, or miscellaneous payments made to the student's account. (Note that a zero balance – even though it's not a positive amount – also shows up in green, because it is **non-negative**.)

FINANCES

CHARMS OFFICE ASSISTANT  
PARENT/STUDENT AREA  
ROSEMOUNT HIGH SCHOOL CHOR  
JOHN STUDENT

FINANCIAL STATEMENT

TRANSFER REQUEST

EXIT CHARMS

Student Financial Statement

Trip Ledger Balance Due	1,650.00				
Fixed Payments Due	12.00				
Fundraising Balance Credit	0.00				
Miscellaneous Balance Credit	26.00				
<b>TOTAL BALANCE DUE</b>	<b>\$ 1,636.00</b>				

Trip Ledger Detail

Paid Date	Trip	Amt Applied	Paid By	Paid From	Dep. Num	
10/26/2011	Chorale Tour Payment No.1 September - 450.00	70.00	txfr	ML	txfr	0
10/26/2011	Chorale Tour Payment No.2 October - 450.00	130.00	txfr	ML	txfr	0
10/24/2011	Chorale Tour Payment No.2 October - 450.00	320.00	Check-1740	TR	1026	0
9/14/2011	Chorale Tour Payment No.1 September - 450.00	380.00	Check-1729	TR	0930	0
6/3/2011	Chorale Tour Deposit - 300.00	300.00	Check-1708	TR	0901	0
	Chorale Tour Payment No.4 January - 450.00	0				
	Chorale Tour Payment No.5 February - 450.00	0				
	Chorale Tour Payment No.6 March - 300.00	0				
	Chorale Tour Payment No.3 November - 450.00	0				
	<b>Total of All Trips Due</b>	<b>2,850.00</b>				
	<b>Total Paid</b>	<b>1,200.00</b>				
	<b>Balance Due</b>	<b>1,650.00</b>				

Student Fixed Payment Detail

Paid Date	Item	Amt.	Paid By	Dep. Num	
not paid	2011-11-09 9-10 Honor Choir entry fee (1)	12.00			
	<b>Total Fixed Payments Due</b>	<b>\$12.00</b>			
	<b>Total Fixed Payments Paid</b>	<b>\$0.00</b>			
	<b>Total Unpaid Fixed Payments</b>	<b>\$12.00</b>			

Student Fundraising Detail

Trans Date	Activity	Value Given	Amt Applied	Amt Profit	Profit To	Paid By	
10/5/2011	09.26.11 Happenings Book Sale	60.00	60.00	60.00	Stu Misc Ledger	G-Cash	0
9/28/2011	07.23.11 Car Wash Pledges	86.00	86.00	86.00	Stu Misc Ledger	G-Cash	0
9/28/2011	07.23.11 Car Wash TIPS	10.00	10.00	10.00	Stu Misc Ledger	G-Cash	0
	<b>Totals</b>	<b>156.00</b>	<b>156.00</b>	<b>156.00</b>			
	<b>Fundraising Balance</b>	<b>0.00</b>					

Student Miscellaneous Ledger Detail

Date	Notes	Amt	Paid By	Dep. Num	Paid To	From	
10/26/2011	Txfr to trip ledger Chorale Tour Payment No.2 October	-130.00	txfr	txfr		T	0
10/26/2011	Txfr to trip ledger Chorale Tour Payment No.1 September	-70.00	txfr	txfr		T	0
10/5/2011	Fundraising: 09.26.11 Happenings Book Sale	60.00	G-Cash	1012	Not Posted	FR	0
9/28/2011	Fundraising: 07.23.11 Car Wash Pledges	86.00	G-Cash	0930	Not Posted	FR	0
9/28/2011	Fundraising: 07.23.11 Car Wash TIPS	10.00	G-Cash	0930	Not Posted	FR	0
6/1/2011	Opening Balance	70.00	N/A	N/A	Not Posted	ML	0
	<b>Total</b>	<b>26.00</b>					

**FYI:** The **green dollar signs** at the far right of each line are links to printable **receipts** for every transaction.

E. The other four sections give detailed information about the flow of money **into** and out of the account:

a. The **Trip Ledger Detail** shows any full or partial **payments or funds transfers made for a trip**.

It also keeps track of the **amount needed to pay off** the trip.

b. The **Fixed Payment Detail** shows any **non-trip related fees or items**

(such as class fees, honor choir fees, choir t-shirts, etc.) that have been billed to the student.

It also shows any **payments or funds transfers made towards those fees**.

Trip Ledger Detail						
Paid Date	Trip	Amt Applied	Paid By	Paid From	Dep. Num	
10/26/2011	Chorale Tour Payment No.1 September - 450.00	70.00	txfr	ML	txfr	
10/26/2011	Chorale Tour Payment No.2 October - 450.00	130.00	txfr	ML	txfr	
10/24/2011	Chorale Tour Payment No.2 October - 450.00	320.00	Check-1740	TR	1026	
9/14/2011	Chorale Tour Payment No.1 September - 450.00	380.00	Check-1729	TR	0930	
6/3/2011	Chorale Tour Deposit - 300.00	300.00	Check-1708	TR	0901	
	Chorale Tour Payment No.4 January - 450.00	0				
	Chorale Tour Payment No.5 February - 450.00	0				
	Chorale Tour Payment No.6 March - 300.00	0				
	Chorale Tour Payment No.3 November - 450.00	0				
<b>Total of All Trips Due</b>		<b>2,850.00</b>				
<b>Total Paid</b>		<b>1,200.00</b>				
<b>Balance Due</b>		<b>1,650.00</b>				

Student Fixed Payment Detail				
Paid Date	Item	Amt.	Paid By	Dep. Num
not paid	2011-11-09 9-10 Honor Choir entry fee (1)	12.00		
<b>Total Fixed Payments Due</b>		<b>\$12.00</b>		
<b>Total Fixed Payments Paid</b>		<b>\$0.00</b>		
<b>Total Unpaid Fixed Payments</b>		<b>\$12.00</b>		

c. The **Student Fundraising Detail** spells out how much a student has earned from each of the various fundraisers. *\*Note that the **profits** from each fundraiser automatically transfer to the Student Miscellaneous Ledger.*

Student Fundraising Detail						
Trans Date	Activity	Value Given	Amt Applied	Amt Profit	Profit To	Paid By
10/5/2011	09.26.11 Happenings Book Sale	60.00	60.00	60.00	Stu Misc Ledger	G-Cash
9/28/2011	07.23.11 Car Wash Pledges	86.00	86.00	86.00	Stu Misc Ledger	G-Cash
9/28/2011	07.23.11 Car Wash TIPS	10.00	10.00	10.00	Stu Misc Ledger	G-Cash
<b>Totals</b>		<b>156.00</b>	<b>156.00</b>	<b>156.00</b>		
<b>Fundraising Balance</b>		<b>0.00</b>				

d. The **Student Miscellaneous Ledger Detail** shows the **accumulation of funds** from **fundraising, donations, and general payments** – as well as any trip payments that are LARGER than the amount currently owed.

It also shows the **outward flow** of money (in the form of **transfers**) from the miscellaneous ledger for trip payments, fee payments, etc.

Student Miscellaneous Ledger Detail							
Date	Notes	Amt	Paid By	Dep. Num	Paid To	From	
10/26/2011	Txfr to trip ledger Chorale Tour Payment No.2 October	-130.00	txfr	txfr		T	
10/26/2011	Txfr to trip ledger Chorale Tour Payment No.1 September	-70.00	txfr	txfr		T	
10/5/2011	Fundraising: 09.26.11 Happenings Book Sale	60.00	G-Cash	1012	Not Posted	FR	
9/28/2011	Fundraising: 07.23.11 Car Wash Pledges	86.00	G-Cash	0930	Not Posted	FR	
9/28/2011	Fundraising: 07.23.11 Car Wash TIPS	10.00	G-Cash	0930	Not Posted	FR	
6/1/2011	Opening Balance	70.00	N/A	N/A	Not Posted	ML	
<b>Total</b>		<b>26.00</b>					

## F. Transferring Funds

Near the top of the screen is a tab labeled “Transfer Request.” Use this to move funds from the Student Miscellaneous Ledger to things like trip payments or fixed payments (i.e., various fees). You can transfer any amount to apply to any payment. You can also apply funds toward more than one payment.

Note: you can only transfer funds if your Miscellaneous Ledger shows a **positive balance**.

FINANCES

CHARMS OFFICE ASSISTANT  
PARENT/STUDENT AREA  
ROSEMOUNT HIGH SCHOOL CHOIR  
JOHN STUDENT

FINANCIAL STATEMENT

TRANSFER REQUEST

EXIT CHARMS

Miscellaneous Ledger Transfer Request

Current Miscellaneous Ledger Balance: \$26.00

Please transfer money from my Miscellaneous Ledger and apply it to:

2011-11-09 9-10 Honor Choir entry fee-12.00

\$

Chorale Tour Deposit - (0.00 due)

\$

Chorale Tour Payment No.1 September - (0.00 due)

\$

Chorale Tour Payment No.2 October - (0.00 due)

\$ 14

Chorale Tour Payment No.3 November - (450 due)

\$

Chorale Tour Payment No.4 January - (450 due)

\$

Chorale Tour Payment No.5 February - (450 due)

\$

Chorale Tour Payment No.6 March - (300 due)

Send Request

Total Amount Requested to Transfer: \$26.00 Total Remaining: \$0.00

A COPY OF YOUR REQUEST WILL BE EMAILED TO:  
LAURA.SANDHAM@DISTRICT196.ORG  
AS WELL AS A COPY TO JOHNQ@YAHOO.COM.

**If you have any questions about finances or any other Charms feature – or if you believe there is an error in your financial record – please contact [Laura.Sandham@district196.org](mailto:Laura.Sandham@district196.org).**