

# Creating a Conference Session That Allows a Parent to Choose a Virtual, Phone or In-Person Conference

This document outlines how the Conference Manager can be configured to allow parents to book virtual conferences, phone or in-person interviews at the school.

## Conditions for success

- Communication is the key. It is essential that teachers conducting virtual interviews are informed that parents will also have the option to book interviews over the phone or in-person by indicating this in the parent comment field. Teachers need to know they must check their schedule before conferences commence to see which conferences are virtual (no comment, default setting), over the phone or in-person. Viewing the comment will ensure each teacher is aware of which parents are attending by phone or in-person. Note no comment is an assumption that the interview will be done virtually. Sample messaging for teachers and parents is provided on page 4.
- Teachers will need to ensure they have created an online meeting for parent-teacher conferences and have copied the URL for the online meeting into the Virtual Conference URL field of their My Profile.
- Teachers will use the “Note to Parents” field in their profile to indicate the physical location where parents should go to attend the in-person if that option is requested. It is important that the teachers know that the LOCATION field in their profile does not get displayed when the Conference Manager is configured for virtual conferences. A sample of the “Note to Parents” is included in the SAMPLE MESSAGE TO TEACHERS at the end of this document.

## Creating a conference session that allows a parent to book a virtual and opt to attend by phone or in-person

1. Log into the Conference Manager and click the CONFERENCES tab and then click the CREATE NEW CONFERENCE ROUND button. The 4 steps of creating a new conference round will be displayed. Click CONTINUE.

2. In the Create Conference Round window that appears, enter a title for the conferences. For example: Virtual, Phone or Face to Face Parent Teacher Interviews. In the NOTE TO PARENTS enter text that describes what a parent needs to do to opt for an in-person or phone conference. We provide the following as a sample:

*IMPORTANT - PLEASE READ! This round of Parent-Teacher Conferences allows you to schedule a virtual online conference or opt to meet with the teacher by phone or in-person. All bookings by default are for virtual online conferences. If you wish to meet by phone or in-person with the teacher, please enter "phone conference please" or "In-person Conference please" in the PARENT COMMENTS field when booking your appointment. No comment indicates a virtual interview. Please note if you opt to attend by phone or in-person, the appointment confirmation email will still refer to the conference as being virtual.*

**TITLE**

Enter a title for this Round to keep yourself organized. This is only for administrative purposes and is not visible to parents.

Meet the Teacher Conferences

**PURPOSE**

Select the purpose of the conferences. This will customize the parent notification emails when the round is about to open.

Parent / Teacher Conferences ▼

**NOTE TO PARENTS (Optional)**

The text you enter here is viewed by ALL parents each time they log into the Conference Manager. This field is optional.

IMPORTANT - PLEASE READ!  
This round of Parent-Teacher Conferences allows you to schedule a virtual online conference or opt to meet with the teacher by phone or in-person. All bookings by default are for virtual online conferences. If you wish to meet by phone or in-person with the teacher, please enter "phone conference please" or "In-person

**PARENT ACCESS**

3. Complete the configuration window for the Conference Round as you normally would and click the NEXT button to proceed to create a Conference Session.
4. You are now ready to create one or more conference sessions. For each conference session include the settings and information as illustrated on the next page.

**SESSION INFO**

A Conference Round is made up of one or more Conference Sessions.

Select a date and include any additional information needed to supplement the date. This information is displayed to parents in a drop-down menu.

Date (mm/dd/yyyy)  - Additional Information (eg. Gr. 4 - 6 (5:00 to 8:00)) (Optional)

Start Time  Finish Time  Interview Duration (Mins)  Travel Time (Mins)  Number of Students per Conference

**CONFERENCE OPTIONS**

Select whether you want the system configured for Face-to-Face (traditional), Virtual or Phone Conferences. This setting is controlled on a session-by-session basis.

☐ Face-to-Face Conferences

☒ Virtual Conferences

☒ Automatically send parents the meeting link in confirmation email ☐ The teacher must click START NOW to send parents the meeting link

**PARENT COMMENTS**

By default the system allows parents to include comments or questions when they make a booking. Remove the checkmark if you prefer that parents not have the ability to include questions or comments.

☒ Allow Parents to Add Comments to Conference Booking

**STAFF BREAKS**

By default the system gives staff the ability to reserve time blocks to schedule a break. Remove the checkmark if you prefer staff NOT to schedule their own breaks.

☐ Allow Staff to Schedule their own Breaks

**TEACHER NOTE**

The system can display a teacher-created message when a parent is booking an appointment. The message is also included in the booking confirmation and reminder emails. The TEACHER NOTE is created in the teacher's profile.

☒ Allow parents to see the TEACHER NOTE

**MAX # OF BOOKINGS A PARENT CAN MAKE WITH EACH TEACHER**

By default the system does not limit the number of bookings a parent can make with each staff member. By selecting a specific number, you can limit the number of bookings a parent can make with each teacher. If you set this to "1", the system will limit the parents to 1 booking per child with each teacher. If the total number of conferences that can be booked by a parent is limited in the configuration of the ROUND, then that limit will take precedence over this setting.

Number of bookings a parent can make per teacher

Session Notice for Parents (Optional)

Viewed by parents each time they select this session.

IMPORTANT - PLEASE READ!

This round of Parent-Teacher Conferences allows you to schedule a virtual online conference or opt to meet with the teacher by phone or in-person. All bookings by default are for virtual online conferences. If you wish to meet by

**ADD STAFF MEMBERS**

You can indicate here that the parent has a choice of conference formats.

Select Virtual Conferences and the "Automatically send parents the meeting link" option. It is critical that teachers ensure they have valid meeting URLs in their profiles before parents begin booking.


Ensure you have checked the "Allow Parents to Add Comments" and the "Allow Parents to see the TEACHER NOTE" options

We recommend including the same or a similar notice to parents as was included in the previous window.

- After making the settings above, complete the Conference Session by selecting the staff who will be participating in the conferences, click the NEXT button and indicate what common breaks you wish to schedule, if any. If applicable, complete additional Conference Sessions as required.
- You are done the configuration of the Conference. However, the important task of communicating to staff and parents remains. To assist with the process, we provide the following as a starting point for what you choose to communicate to teachers and to parents.

## SAMPLE MESSAGE TO TEACHERS

Parent-Teacher Conferences are approaching. This next round of conferences we will be using the Conference Manager to have parents book virtual conferences. In addition, we are allowing parents the option of indicating they want to attend their conference over the phone or in-person at the school. Parents who wish to attend their conference on the phone or at the school will be asked to indicate this in the *COMMENTS* box on the online booking form. This means that when you view your schedule in the Conference Manager, you will see a comments icon appear on your schedule when a parent has left a comment. While the parent comment may not necessarily be about attending the conference on the phone or in-person, all parents intending to participate this way are asked to indicate this as a comment. The conference bookings will all contain a phone number the parent can be reached at and these will be displayed in your schedule. Clicking on or hovering over the icon will display the comments made by the parent. Note no comment indicates that the parent is wishing a virtual interview.

AVAILABLE	TIME	STUDENT NAME	PARENT/GUARDIAN NAME	COMMENT	OTHER ATTENDEES	MEETING	PHONE	
<input type="checkbox"/>	6:00 PM	Lawson Parker	Brant Parker			<a href="#">ADD</a>	<a href="#">START NOW</a>	250-555-1212 <a href="#">EDIT</a> <a href="#">CANCEL APPT.</a>
<input checked="" type="checkbox"/>	6:15 PM							<a href="#">BOOK</a>

Comments icon

Phone conference please


There are two important tasks we are asking all teachers to do by **[ENTER DATE]**:

1. Use the online meeting software used by the school to create an online meeting for Conferences and copy the meeting link.
2. Log in to the Conference Manager at **[ENTER Conference Manager URL]** and click on the MY PROFILE tab and paste the meeting link in the Virtual Conference URL field. Then in the “Teacher Note to Parents” field enter the location where you will be conducting any face-to-face conferences. The message should be in a format like “Parents opting to attend face-to-face conferences should go to **[ENTER CONFERENCE LOCATION]** at their designated conference time”. Please note that the *Conference Location* entered in your profile does not get displayed to parents when the Conference Manager is configured for virtual conferences, which is why the *Note to Parents* field must be used to indicate the location for face-to-face conferences.

## SAMPE MESSAGE TO PARENTS

This next round of conferences we will be using the Conference Manager to have parents book virtual conferences. Although conferences booked are conducted online by default, parents have the option of indicating they wish to conduct their conferences over the phone or in-person at the school.

When the Conference Manager opens for booking you will note that it has been configured for parents to book virtual conferences. If you want your conference over the phone or in-person at the school, please indicate this by entering “Phone conference please” or “In-person conference please” in the Comments box which is part of the online booking form. You will see reminders of what to do when you log-in to the Conference Manager.



Please remember the format you requested as the confirmation and reminder emails will refer to participating in an online virtual conference and may include the location in the school where a teacher is conducting in-person conferences. The teacher will call parents who indicated phone conference at the number you provided when booking.