

How to Guide

Manually Booking for a Parent Who Does Not Have an Account

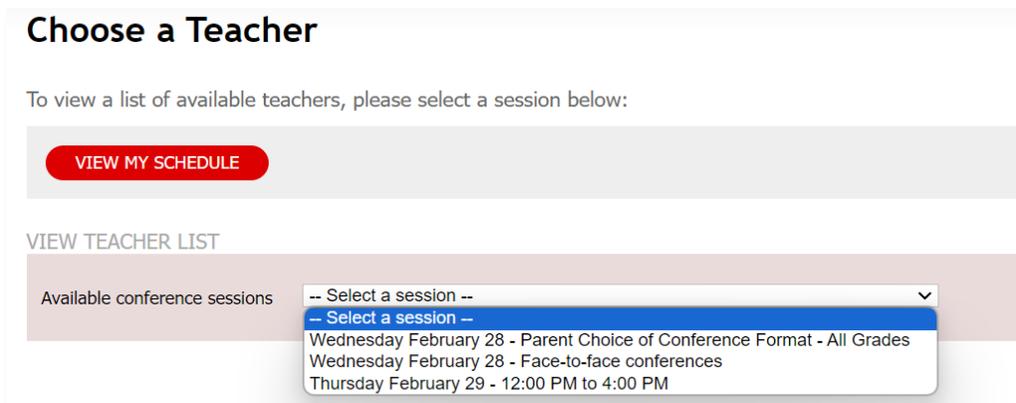
Applies to: Standalone Conference Manager System Admin and Office Admin
PowerSchool Conference Manager System Admin and Office Admin

This guide assumes the System Admin or Office Admin user is booking one or more appointments on behalf of a parent who has not created either a Conference Manager account or a PowerSchool Web Access account. We recommend all parents be encouraged to create their own Conference Manager account or Parent Portal account (if integrated with PowerSchool) so the manual booking of appointments is not necessary.

Step 1 – log in to the Conference Manager and click the SCHEDULES tab.



Step 2 – Select the conference session requested by the parent.



Step 3 – From the staff list select the teacher(s) with whom the parent would like to meet.

VIEW TEACHER LIST Print ALL Staff Print ALL Staff (No Comments)

Available conference sessions Wednesday February 28 - Parent Choice of Conference Format - All Grades ▾

The following teachers are available on the date you selected. Choose the teacher(s) you would like to meet with.

<input type="checkbox"/>	NAME	TEACHING ASSIGNMENT
<input checked="" type="checkbox"/>	Mr. Chester Acorn	Kindergarten
<input checked="" type="checkbox"/>	Mrs. Sharon Armstrong & Mrs. Lucy McNicol	Fine Arts Team
<input type="checkbox"/>	Mrs. Rhianna Barb	Gr. 4
<input checked="" type="checkbox"/>	Jane Barnett	Grade 3
<input type="checkbox"/>	Ms. Michele Boujalais	Gr. 1
<input checked="" type="checkbox"/>	Charlie Brown	Band

Step 4 – Start with the first booking by clicking the time slot. Here 12:18 has been selected.

	C. Acorn <i>Kindergarten</i> <i>Tiny Room</i>	S. Armstrong L. McNicol <i>Fine Arts Team</i> <i>Music Room</i>	J. Barnett <i>Grade 3</i> <i>Room 4</i>	C. Brown <i>Band</i> <i>Band room</i>
12:00	McNicol	12:00	Parker	12:00
12:18	12:18	12:18	12:18	12:18
12:36	McNicol	12:36	12:36	12:36

Step 5 – Search for the parent by first name, last name or email to determine if they already have an account. If the parent does not have an account, you will use the ADD PARENT button to create an account for them. If an account already exists for the parent click the SELECT button beside their account and skip to step 7.

Make a Booking

CONFERENCE DETAILS

Teacher: Mr. C. Acorn
Location: Tiny Room
Date: Wednesday Feb 28, 2024
Start Time: 12:18 PM

RESERVE this time block on the teacher's behalf.

Traska

Total: 0

REGISTERED PARENTS/GUARDIANS

LAST NAME	FIRST NAME	EMAIL
There are no parents registered with the selected criteria.		

Step 6 – Create an account for the parent manually by ensuring getting the required information from the parent. If the parent has an email, please enter this so that they will receive confirmation and reminder emails regarding their appointment from the Conference Manager.

Create a Parent

Teacher: Mr. C. Acorn
 Location: Tiny Room
 Date: Wednesday Feb 28, 2024
 Start Time: 12:18 PM

PARENT/GUARDIAN INFORMATION

If you are setting up a parent account on behalf of a parent without a computer the Username, Email and Password fields can be left blank.

First Name: Last Name:

Email Address (optional): Primary Phone (optional):

STUDENT INFORMATION

Student 1: First Name: Last Name:

Student 2: First Name: Last Name:

Student 3: First Name: Last Name:

Additional Information

Once the parent account is created, it will be available to use in future rounds of conferences so you won't need do repeat this step for the same parent. To assist with future bookings for the parent, you will only need to search for the parent and then book the appointment.

If you the Conference Manager is integrated with PowerSchool, it is important to know that there is no link between the account you created manually and PowerSchool. This means the parent will still not have a Parent PowerSchool Account and will, therefore, still not be able to access the Conference Manager to book or view their appointments.

If you ever need delete or edit this account you can do so from the PARENTS tab.

NAME	NAME	EMAIL ADDRESS	PHONE	ACTION
Traska	Lisa	Bows Traska, Buttons Traska		<input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
Traska	Lisa	Melissa Traska		<input type="button" value="EDIT"/> <input type="button" value="DELETE"/>

Step 7 – Complete the booking form for the parent. The Phone Number field is required. If no phone number is available, you can enter NA.

CONFERENCE DETAILS

Conference Type: Face to Face
 Teacher: Mr. C. Acorn
 Location: Tiny Room
 Date: Wednesday Feb 28, 2024
 Start Time: 12:18 PM

Student Info
 Name: Bows Traska

Parent/Guardian Info
 Traska Lisa

Conference Type

Face-to-Face Conference
 Phone Conference
 Virtual Conference

Phone Number *
 Please enter a phone number that the parent can be contacted by the teacher
 403-555-1212

Comments or Questions (Optional)
 Comments or questions for the teacher regarding this conference.

Step 8 – If additional appointments with other teachers have been requested and these teachers were selected in step 3, you can continue to book appointments by selecting a time block in the next teacher’s schedule and then click the SELECT button beside the parent account, which should still be visible. These steps can be repeated for any additional appointments that are being requested.

	C. Acorn Kindergarten Tiny Room	R. Barb Gr. 4 Room 183	J. Barnett Grade 3 Room 4	C. Brown Band Band room
12:00	McNicol	Parker	Parker	12:00
12:18	Traska	12:18	12:18	12:18
12:36	McNicol	12:36	12:36	12:36
12:54	12:54	12:54	AMAYA-ZAF...	12:54

Make a Booking

CONFERENCE DETAILS

Teacher: Mrs. R. Barb
 Location: Room 183
 Date: Wednesday Feb 28, 2024
 Start Time: 12:36 PM

RESERVE this time block on the teacher's behalf.

Traska

Total: 1

REGISTERED PARENTS/GUARDIANS

LAST NAME	FIRST NAME	EMAIL	
Lisa	Traska		<input checked="" type="button" value="SELECT"/> <input type="button" value="EXIT"/>

CONFERENCE DETAILS

Teacher: Mrs. R. Barb
 Date: Wednesday Feb 28, 2024
 Start Time: 12:36 PM

Student Info
 Name: Bows Traska
 Bows Traska

Parent
 Buttons Traska
 Traska Lisa

Conference Type

Face-to-Face Conference
 Phone Conference
 Virtual Conference

Phone Number *
 Please enter a phone number that the parent can be contacted by the teacher

Comments or Questions (Optional)
 Comments or questions for the teacher regarding this conference.