

For access to detailed information regarding the use of the Conference Manager, please refer to the System Admin Guide in the found in the HELP CENTER.



How to Create a Conference Round

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Creating and Managing a Conference Round

Use the screenshot below to become familiar with the key components associated with creating and managing a conference round.

Click the CREATE NEW CONFERENCE ROUND button to launch the CREATE NEW ROUND WIZARD that will guide you through the steps of creating a new *Conference Round*.

The VIEW PARENT SITE button allows you to see what parents will see once the current *conference round* opens for parents to book. It is the best way to verify the *conference round* is configured the way you want it.

Memorial School Conference Manager

MAIN SCHEDULES CONFERENCES STAFF PARENTS SCHOOL PROFILE MY PROFILE

License expires in 88 days

Conference Manager Administration

Create a new conference round or edit an existing conference from the lists below.

CREATE NEW CONFERENCE ROUND VIEW PARENT SITE

Spring Virtual Conferences ****For Demo Purposes Only****

Open: Saturday October 09, 2021 at 09:30 AM
Close: Tuesday April 26, 2022 at 06:00 AM

EDIT DELETE

ADD SESSION EXPORT CONFERENCES VIEW SURVEY DATA

TITLE	DATE	START	FINISH	TYPE	COMMON BREAK	SESSION
Face-to-face Conferences	Thu, Apr 28, 2022	3:00 PM	7:30 PM	Face 2 Face	EDIT BREAK	EDIT DELETE
Phone Conference Option Conferences	Fri, Apr 29, 2022	8:30 AM	2:30 PM	Phone	EDIT BREAK	EDIT DELETE
Virtual Conferences - All Grades	Fri, Apr 29, 2022	6:00 PM	8:25 PM	Virtual	EDIT BREAK	EDIT DELETE
Virtual Conferences - All Grades (Using Start NOW button)	Sat, Apr 30, 2022	9:00 AM	2:55 PM	Virtual	EDIT BREAK	EDIT DELETE

Conference type refers to the format of the conference, which can be face-to-face, virtual, phone, or allows the parent to choose from a combination of the above.

Once a *conference round* is created, the high-level details are displayed for quick review. If there are more than one *conference round* showing, the active round will have a double-lined colored box around it. **There can be only one active *conference round* at a time.**

Once a *conference round* is created, it is possible to modify it using the edit buttons. A *conference session* can also be added using the ADD SESSION button. **Note you cannot make changes once a booking has taken place as the system locks the session set-up.** To make changes you must cancel these bookings. If you want to increase the number of students per conference you must contact support@schoolsoft.com and ask for the change to be made.

Creating a Conference Round

1. From the MAIN tab click the CREATE NEW CONFERENCE ROUND or from the CONFERENCES tab select CREATE NEW CONFERENCE ROUND. This will launch the Conference Wizard that takes you through the steps to create a *Conference Round*.
2. Complete the CREATE CONFERENCE ROUND form using the information below as a guide.

Create Conference Round

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

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.

PARENT ACCESS
Select the date and time you want parents to START booking their conferences.
Date Open to Parents (mm/dd/yyyy) Time Open to Parents 6:00 AM ▼
Select the date and time you want parents to STOP booking conferences. Note: Once the system is closed, parents can still login to view, print and cancel bookings.
Date Closed to Parents (mm/dd/yyyy) Time Closed to Parents 6:00 AM ▼

ADVANCED OPTIONS
MAX # OF BOOKINGS A PARENT CAN MAKE FOR THIS ROUND
By default parents are able to schedule an unlimited number of conferences across all teachers. By specifying a number, you can limit the total number of bookings a parent can make. For example, if you choose "3", a parent booking appointments will be limited to 3 bookings for each child. This number can be increased while the system is still open if you wish to increase the number of bookings a parent can make. We recommend you inform parents about any limitations you might set.
Number of bookings a parent can make per round per child No Limit ▼

PARENT REMINDER EMAIL OPTIONS
When the checkbox is selected the system will automatically send two emails to all registered parents: (1) TWO WEEKS prior to opening, (2) ONE DAY before your round opens.
 Automatically send reminder emails when the Round is about to open

ADDITIONAL PARENT REMINDER EMAIL (Optional)
You have the option to send a second reminder email to all registered parents after the date that booking for the conference round begins.
Date to Send (mm/dd/yyyy)

AUTOMATIC DELETION OF CONFERENCE ROUND (Optional)
ALL Conferences will be removed from the system 2 months after the assigned end date.
You can alter this by providing an alternate date for this deletion.
Deletion Date (mm/dd/yyyy)

Provide a title for the *Conference Round*. This will be used to help you keep your conference rounds organized in the future.

The Conference Manager will adjust the content of the emails sent to parents based upon the purpose. These can include Parent-Teacher Conferences, Registration Conferences or Student-led Conferences.

Use this field if you want to display an on-screen notice to ALL parents when they log in.

The date and time you want the Conference Manager to open to parents for booking and when you want it to close so they can no longer book. Often the close date coincides with the final day of parent-teacher conferences.

This allows you to limit the number of total bookings a parent can make for the entire round. Unless there is a definite reason to limit the number of conferences, we strongly recommend you leave this set at no-limit. If you use a limit be sure to inform parents of this in advance.

Check this box if you want ALL parents to receive an email informing them booking is soon to begin. If you do check this box, remember your first round you likely will not have parents registered in advance of booking so they will not receive an email even if the box is checked. We always recommend for your first round, you email parents the information. You can also include an addition reminder email on a desired date using the ADDITION PARENT REMINDER EMAIL field.

Conference booking data is deleted 2 months following the conferences. Using this field allows you to extend that data deletion until the date you specify.

- Click the NEXT button and you will be guided through the process of creating a *Conference Session*. Use the guidance below to complete the CREATE CONFERENCE SESSION form.

Create Conference Session

Spring Conferences (Parent choice of format)

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 when they make a booking.

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 (for F2F conferences only)

CONFERENCE TYPES (*NEW FUNCTIONALITY*)

Select a single conference type (e.g. Virtual) OR give parents the option of choosing from more than one conference type when they make a booking (e.g. If you check off Virtual and Face-to-face, the parent can choose to have either a Virtual or Face-to-face conference). This setting is controlled on a session-by-session basis and can only be changed up until conference bookings have been made.

Face-to-Face Conferences
 Phone Conferences
 Virtual Conferences

Automatically send parents the meeting link in confirmation email - RECOMMENDED The teacher must click START NOW button 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 that 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.

ADD STAFF MEMBERS

Add all the staff members you want to appear on this session. If there are team conferences then the same teacher cannot be selected as part of a team and as an individual.

Enter the date of the first session. Include any additional information that would help parents choose this session from a drop-down list.

Select the number of students per conference time block. This will be set to 1 for traditional conferences, but Student-led Conferences often include longer blocks of time and the parents of 4 or 5 students in the room at the same time. The teacher then spends time with one set of parents at a time during the longer time block. **If more than one conference type is checked in the following setting, it should almost always be set to 1.**

New! Check one or more boxes to match the desired conference type(s) for the *conference session*. **Checking one box means all conferences will be of that type. If more than one box is checked it means the parent will have the option of selecting their preference from the types checked.** If you select Virtual Conferences, you will then decide if you will include the meeting link in the confirmation email to parents (recommended) or if the teacher clicks the START NOW button in their schedule to send the meeting link to parents. See the [Virtual Conferences](#) section below for details.

Check this box if you want to include a COMMENTS field in the parent booking form.

Check to allow teachers to reserve time blocks that then can't be booked by parents. This allows teachers to schedule their own breaks.

Checking this box allows teachers to include a note in the booking confirmation email sent to parents. The content is pulled from the *Note to Parents* field the Teacher PROFILE. We recommend you check this box. Detailed information about this feature can be found in the [Teacher Note](#) section below.

Use this box if you want to include a specific message to all parents who select this *conference session*. For example, you may want to remind parents to visit the Science Fair in the school's library.

Here you can specify the maximum times a parent can make a booking with a teacher for each child the parent has a teacher's class or homeroom. We recommend you set this to 1.

4. Check off all staff who are or may be involved in parent conferences. This should include all people conducting conferences as well as any other staff member who may be invited by a teacher to participate in a conference. Any staff member whose account is set to not be visible in the list parents select staff will display *Not Visible to Parents* to the right of the name

ADD STAFF MEMBERS

Add all the staff members you want to appear on this session. If there are team conferences then the same teacher cannot be selected as part of a team and as an individual.

<input type="checkbox"/> SELECT ALL	NAME	TEACHING ASSIGNMENT
<input checked="" type="checkbox"/>	C. Acorn	Kindergarten
<input type="checkbox"/>	M. Boujalais* & C. Acorn	Grade 6 Team
<input checked="" type="checkbox"/>	T. Amin <i>Not Visible to Parents</i>	System Admin
<input type="checkbox"/>	S. Armstrong	Fine Arts
<input checked="" type="checkbox"/>	S. Armstrong* & S. Parker	Fine Arts Team

5. Click the NEXT button and you will be prompted to create a COMMON BREAK for all teachers.

Select Common Break
Spring Parent Teacher Conferences
 Grades K-6

Select the time blocks you would like to reserve for all staff. You also have the option of allowing teachers to reserve their own time blocks. Leave the checkboxes blank if you do not wish to book a common break for this session.

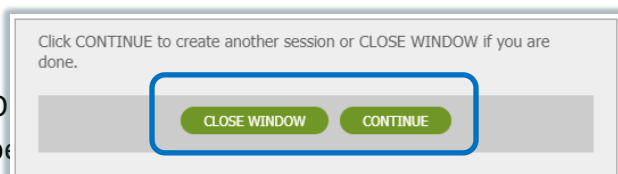
<input type="checkbox"/> 8:30 AM - 8:45 AM	<input type="checkbox"/> 10:45 AM - 11:00 AM	<input type="checkbox"/> 1:00 PM - 1:15 PM
<input type="checkbox"/> 8:45 AM - 9:00 AM	<input type="checkbox"/> 11:00 AM - 11:15 AM	<input type="checkbox"/> 1:15 PM - 1:30 PM
<input type="checkbox"/> 9:00 AM - 9:15 AM	<input type="checkbox"/> 11:15 AM - 11:30 AM	<input type="checkbox"/> 1:30 PM - 1:45 PM
<input type="checkbox"/> 9:15 AM - 9:30 AM	<input type="checkbox"/> 11:30 AM - 11:45 AM	<input type="checkbox"/> 1:45 PM - 2:00 PM
<input type="checkbox"/> 9:30 AM - 9:45 AM	<input type="checkbox"/> 11:45 AM - 12:00 PM	<input type="checkbox"/> 2:00 PM - 2:15 PM
<input type="checkbox"/> 9:45 AM - 10:00 AM	<input checked="" type="checkbox"/> 12:00 PM - 12:15 PM	<input type="checkbox"/> 2:15 PM - 2:30 PM
<input type="checkbox"/> 10:00 AM - 10:15 AM	<input checked="" type="checkbox"/> 12:15 PM - 12:30 PM	<input type="checkbox"/> 2:30 PM - 2:45 PM
<input type="checkbox"/> 10:15 AM - 10:30 AM	<input checked="" type="checkbox"/> 12:30 PM - 12:45 PM	<input type="checkbox"/> 2:45 PM - 3:00 PM
<input type="checkbox"/> 10:30 AM - 10:45 AM	<input checked="" type="checkbox"/> 12:45 PM - 1:00 PM	

Here you can see the time blocks between noon and 1 PM have been reserved so the teachers can have lunch. When a parent selects this *conference* session these time blocks will appear as being booked or not available. The break time blocks can be removed from any specific teacher's schedule by the teacher or the System Admin/Office Admin user by going into the teacher's schedule and checking the availability checkbox (see [Teacher Detailed Schedule](#)**Error! Reference source not found.**).

Click the NEXT button and you will be provided with the option to CONTINUE and create another session or to close the Conference Round Wizard.

- Click the NEXT button and you will be provided with the option to CONTINUE and create another session or to close the Conference Round Wizard.

- Once you click the NEXT button, you will be provided with the option to CONTINUE and create another session or to close the Conference Round Wizard. Click the CLOSE WINDOW button, you will be returned to the Conference Manager Administration Panel and can review the details of your *conference round*. As shown on the screenshot below, if further changes are needed you can click the EDIT button beside the *conference round* or the *conference session*. You can also click the EDIT BREAK button to edit a *common break*.



MAIN SCHEDULES CONFERENCES STAFF PARENTS SCHOOL PROFILE MY PROFILE

License expires in 341 days Welcome: Tulauna Amir

Conference Manager Administration

Create a new conference round or edit an existing conference from the lists below.

CREATE NEW CONFERENCE ROUND VIEW PARENT SITE

Spring Virtual Conferences ****For Demo Purposes Only**** EDIT

Open: Friday November 27, 2020 at 09:30 AM

Close: Friday April 30, 2021 at 06:00 AM

ADD SESSION

CONFERENCE SESSIONS

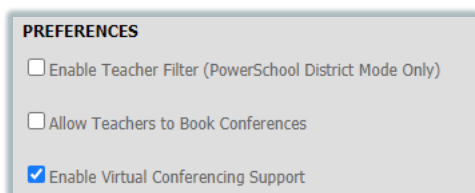
TITLE	DATE	START	FINISH	COMMON BREAK	SESSION
Virtual Conferences - All Grades (use of start now)	Thu, Apr 29, 2021	6:30 PM	8:25 PM	EDIT BREAK	EDIT
Virtual Conferences - All Grades (demo of link in confirmation email)	Fri, Apr 30, 2021	9:00 AM	2:55 PM	EDIT BREAK	EDIT

TIP If you ever find yourself needing to prevent any further bookings from being made for a particular *conference session*, you use EDIT COMMON BREAK button (shown on next page) for the *conference session*, and simply check all the times. It is a little tedious checking the boxes, but once all the time slots have been checked, all unbooked time slots will show as not being available to parents, with the booked time slots not being affected. If you then want to make those time slots available again, you can again use the EDIT COMMON BREAK button uncheck the desired time blocks and they will again be available for parents to book. Some schools have used this process to

stop parents from booking times in a *conference session* that is about to commence, which still allowing parents to book times during *conference sessions* that are occurring later in the week.

About Virtual Conferences

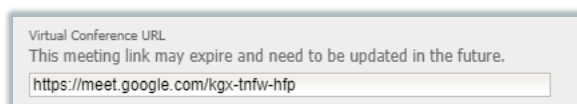
The Conference Manager supports the scheduling of Virtual Conferences using any web-based online meeting software like Google Meet, Zoom and Microsoft Teams. In order for the Conference Manager to manage Virtual Conferences, the feature must be enabled in the PREFERENCES section of the SCHOOL PROFILE. It must then be activated for each *conference session* that will involve Virtual Conferences.



PREFERENCES

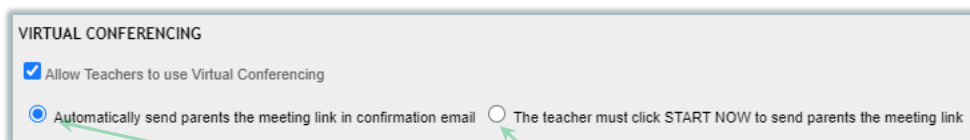
- Enable Teacher Filter (PowerSchool District Mode Only)
- Allow Teachers to Book Conferences
- Enable Virtual Conferencing Support

The key to scheduling Virtual Conferences is making sure that the teacher creates an online meeting link that will be used for their conferences. This link must be copied from the online meeting software and pasted into the teacher's profile. To have Virtual Conferences operate smoothly, it is important that each teacher puts this online meeting link in the Teacher Profile **before parents begin booking**.



Virtual Conference URL
This meeting link may expire and need to be updated in the future.

There are two ways that the online meeting link can be shared. The System Admin sets this option for each conference session, as shown in the [Conference Session Set-up](#) section and in the screenshot below.



VIRTUAL CONFERENCING

- Allow Teachers to use Virtual Conferencing
- Automatically send parents the meeting link in confirmation email
- The teacher must click START NOW to send parents the meeting link

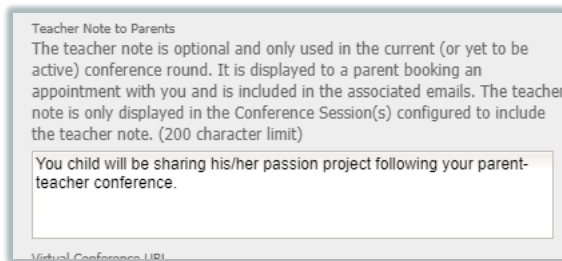
The first and recommended option in configuring the conference session is to have parents receive the meeting link immediately in the booking confirmation email and the attachment that allows a parent to add the appointment to their calendar application. The link is also displayed in the reminder emails as well as on the parent conference schedule page in the Conference Manager

The second way of configuring Virtual Conferences requires the teacher to click the START NOW button at the time the conference is to start. The Conference Manager then sends an email with the meeting link to the parent. This option is only recommended if the online meeting platform used by the school does not allow the teachers to control when a parent is admitted into the online meeting.

When virtual or phone conferences are being conducted, the parent is required to enter the phone number they can be reached at during the conference booking. This ensures the teacher has the number to call should there be a technical issue or if the conference is to be conducted on the phone.

About the Teacher Note to Parent's Feature

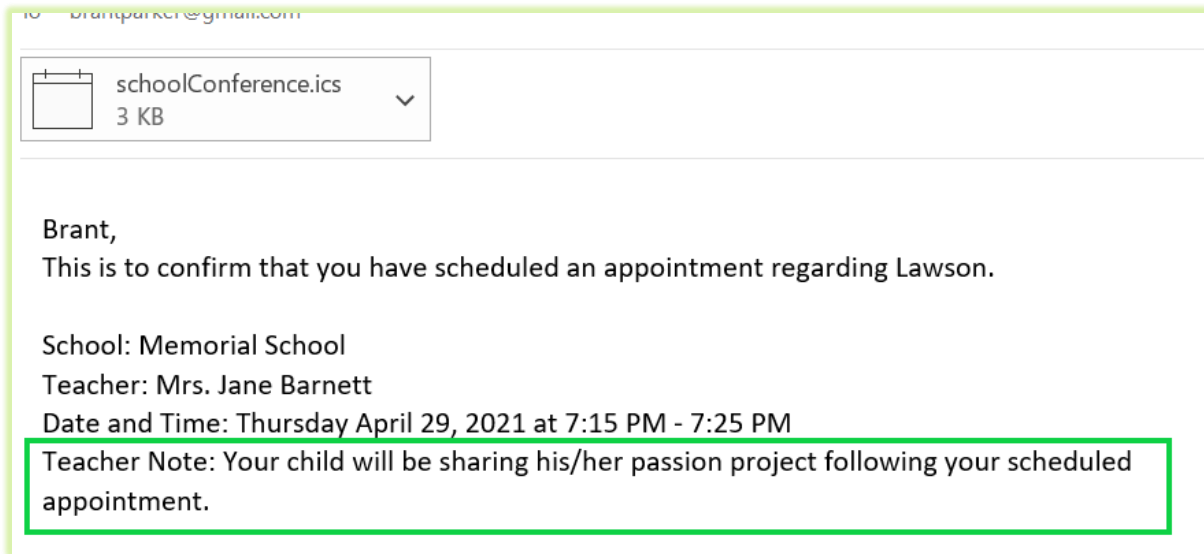
When this feature is checked in the *conference session(s)* settings, it allows a personalized message from a teacher (or System/Office Admin on behalf of a teacher) to be passed along to parents. Specifically, the message is included in the confirmation and reminder emails sent by the Conference Manager to the parents who book, or have already booked, an appointment in the *conference session* with that teacher. The personalized note sent is taken from the *Note to Parents* field in of the teacher's profile. If bookings are already made, a new or edited note immediately triggers an updated confirmation email to those parents booked with that teacher.



This feature makes it easy to pass along important information to only the parents who have an appointment with a particular teacher. This might be providing parents with a passcode required to access their online conference or providing information that is specific to that teacher's conferences as illustrated in the screenshot below.

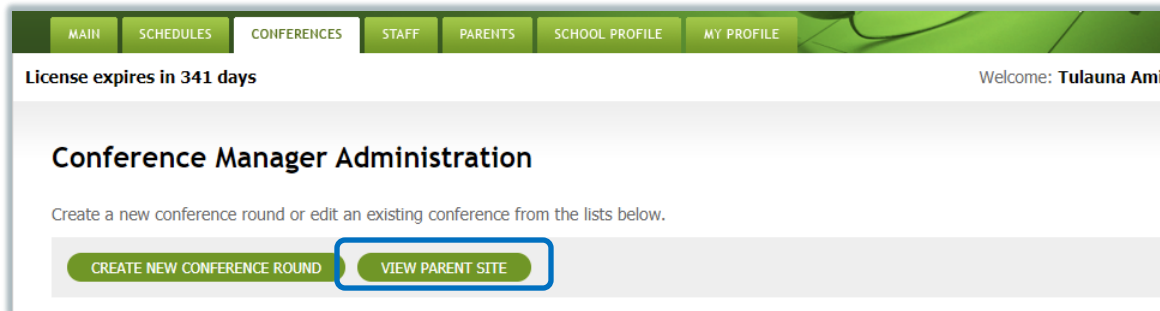
If you have enabled this feature, you can refer staff interested in using it to the "[Using the Parent Notes Function as a Teacher.PDF](#)" resource located in the [SchoolSoft Help Center](#).

The screen shots below show how the teacher note to parents is included in the confirmation and reminder email the parent receives after booking, as well as how it appears in the parent's list of appointments in the Conference Manager.



Verifying the Conference Round by Viewing the Parent Site

On the CONFERENCES tab you can use the VIEW PARENT SITE BUTTON to see what is displayed to a parent once they log into the Conference Manager. Please note that appointments cannot be booked through accessing the VIEW PARENT SITE. It is only intended to be used to verify the set-up of the *conference round* is as you intended.



Launching your Conference Round

PowerSchool Mode only Note that if you are using the Conference Manager in PowerSchool mode you will need to import parents from Power School before parents can access the Conference Manager. See [Managing Parent Accounts](#).

After configuring your *conference round*, it is critical that you communicate to parents what they need to do in relation to booking conferences. We recommend you attend to the following two communication tasks to ensure a smooth launch of the scheduling of parent-teacher conferences.

1. **Communicate with Parents**

Send a communication to parents informing them of your school's use of the Conference Manager as well how to register and when they will be able to book conferences and the steps they take to complete that process. We encourage you to send this communication shortly after your Conference Manager has been set up. SchoolSoft has sample content for these communications in the [HELP CENTER](#).

2. **Communicate with Teachers**

Ensure teachers are informed about the use of the Conference Manager and are aware of the responsibilities they have in the use of the Conference Manager.

Staff will need to know:

- a. The schedule that is being used for parent booking, including; when parent booking will open and close.
- b. If you have created the teacher accounts, they should be reminded that they will have received an email from appointments@schoolsoft.com that will contain their login information. Ideally this information should be communicated to teachers before the account is created so that they are watching for the email before it arrives.
- c. If Virtual Conferences are planned teachers need to know that they will need to create one online meeting that will be used for the *conference sessions* that make up the *conference round*. This is created using the software platform used by the school (Zoom, Google Meet, Microsoft Teams, etc.). The online meeting link (meeting URL) needs to be copied and pasted in the Virtual Conferences Link field in teacher's MY PROFILE tab in the Conference Manager. This is best done before parents begin booking. Teachers can view a short video that details how they initiate a Virtual Conference in the [HELP CENTER](#).
- d. If you have decided to use the *Teacher Note to Parents* feature, you will need to let them know it is available, for which sessions, and if desired, they can create the teacher note in the MY PROFILE tab once they are logged into the Conference Manager. You can share the "[Using the Parent Notes Function as a Teacher.PDF](#)" resource located in the SchoolSoft the [HELP CENTER](#) with any teacher who wants to create and use a Teacher Note to Parents.