Instructions for Creating a New Conference Round for Scheduling Parent-Teacher Conferences

SchoolSoft

Welcome to your school's conference manager.
The Conference Manager allows you to schedule parent-teacher conferences on-line.

To create a conference, you must log in to the system.

Step One – Update Staff Accounts

Go to the STAFF TAB and update your staff list by deleting staff no longer at the school and adding new ones by
clicking on the ADD A NEW STAFF button.

Step Two – Create a New Conference Round

Go to the CONFERENCE TAB and select the CREATE A NEW CONFERENCE ROUND.
Click CONTINUE.
(Our set up wizard walks you through the steps.)

ADVANCED OPTIONS: Make sure the opening email option is checked if you want all parents to get notification (Note this is the default).

If you are targeting parents specifically and do not want the entire parent data bank emailed then make sure this option is not checked. You will then contact these specific parents via your own system.

Hit NEXT

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)

CANCEL   NEXT

Step Three A – Add Sessions

Sessions are done on a daily basis and also by individual need. For example you could have two session for one day.
One session for Kindgarten only
and one for Grades 1-6.

Create Conference Session
Fall Virtual Conferences ***For Demo Purposes Only***

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

6:00 AM ▾   6:00 AM ▾   10 ▾   0 ▾   1 ▾

CONFERENCE OPTIONS

Select whether you want the system configured for Face-to-Face (traditional), Virtual or Phone Conferences. This setting can only be changed up until conference bookings have been made.

○ Face-to-Face Conferences
○ Phone Conferences
○ Virtual Conferences

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   1 ▾

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.

☐	A. Sarkar* & K. Smith & I. Starr	Support Team
☐	K. Smith	Math
☐	I. Starr	Counsellor
☐	C. Turner	French

* - denotes primary teacher in teacher team

CANCEL   SUBMIT

Select the date of the interview.
Input Appropriate Title ie. "Kindergarten only".
Select the time to
START, FINISH, INTERVIEW DURATION
and the NUMBER OF STUDENTS

Customize PARENT COMMENTS,
STAFF BREAKS and MAX # OF BOOKINGS.

Scroll down to the list and check off anyone wishing interviews.

Leave off anyone who does not want interviews. (Exception is for principals or support staff that are not visible to parents. If they want to be added into interviews via your school admin check them off. An ADD button will appear in the STAFF schedule after a booking has been made). As for teaching teams only select the team not the individuals to prevent double bookings.

Hit SUBMIT

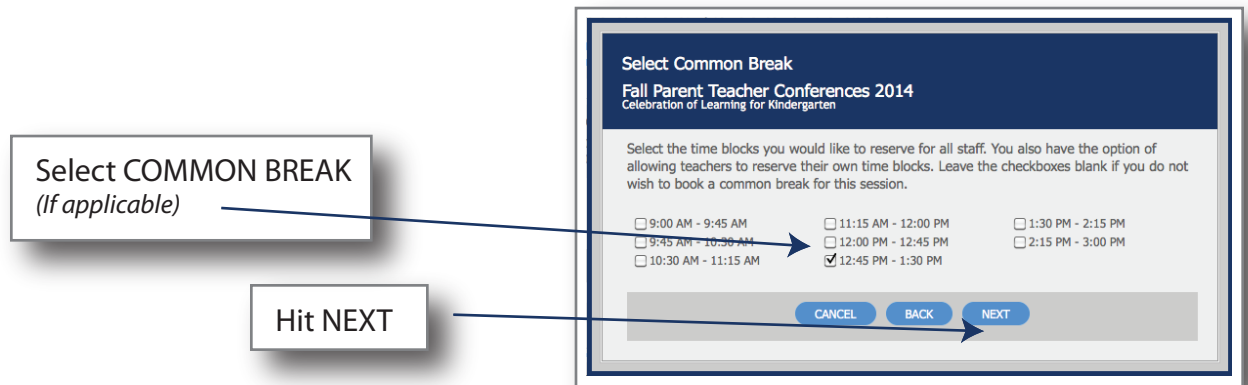## Step Three B – Pick type of interview

We have 3 types of interviews to pick from:
- Face to Face Conferences
- Phone Conferences
- Virtual Conferences
or a combo of the above.
Detailed information on each type of conference is located here:
https://www.schoolsoft.com/document-library/

Select COMMON BREAK
(If applicable)

Hit NEXT

More Sessions? Hit CONTINUE

All your other interveiws can be done the same way.
Be sure to label it accordingly (ie Grades 1 to 9) and select the appropriate teachers.

Step Three – Check your work!

Go to the SCHEDULE TAB, select each session individually and make sure all appear who want interviews and no one is there that doesn't. Select all then hit NEXT. Check to make sure times are correct and breaks are proper. Double check your work by going to the CONFERENCE TAB and selecting VIEW PARENT TAB.

Step Four – Things to Remember

Make sure you encourage your new families to make an account.

Support documents are available to you, staff and parents in the upper right corner of the page called HELP CENTER left of the LOG OUT button.

Add appointments@schoolsoft.com to email address books to avoid spam filters.

Email support@schoolsoft.com if you have any questions or concerns.

Example of what your round should look like: