



Using the SchoolSoft Conference Manager to Schedule Pick-up of Student Personal Items

We are doing our best to be responsive and supportive to the ever-changing needs of the schools using the SchoolSoft Conference Manager. We have come to understand that many schools are interested in using the Conference Manager to create a schedule that would stagger parents and/or students coming to the school to clean out lockers and collect personal items to take home.

Although the system was designed to support the online booking and management of parent-teacher conferences, we know that it will support this “locker clean-out” use as long as users (especially parents) know that most of the screens and emails will use terminology related to conferences.

If your school is interested in using the SchoolSoft Conference Manager for the purposes of scheduling times when a limited number of parents or students would come to the school to gather personal items, we hope you will find the following Conference Manager configuration information useful.

Step 1. Decide if you need to create a new “conference round” for locker clean out or if you are going to be adding a conference session to an existing round for that purpose.

The Conference Manager can only be configured to do one round of Parent-Teacher Conferences at a time. You must decide if you want to create a new *conference round* for the locker clean out or if you want to add the locker clean-out as a new *conference session* to the current round of conferences, assuming one has been set up. You will not want to create a conference round if you already have a current round of conferences set-up, as the new conference round will not be displayed.

If you are setting up a new Conference round, continue following the next steps. If you are adding the locker clean-out as a conference session to the existing conference round, do step 2 and skip step 3 and go to step 4.

Step 2. – Create a special staff account if necessary (You can always use on of your admin staff already in the system.)

Click the STAFF tab and the ADD STAFF MEMBER button and create an account with the first name of “*” (that is just an asterisk, no quotes) and the last name that is descriptive, such as “*Locker Cleanout”. If you put an asterisk at the beginning of the last name it will appear at the top of the staff list on the staff page, which may be useful if you want to delete it later.

The LOCATION could state something like “Time when personal items will be gathered and taken home”. You will need to assign the person a made-up email address and username. The staff account may look something like the screenshot below.

The screenshot shows a web form titled "STAFF INFORMATION" with two sections: "STAFF INFORMATION" and "OTHER INFORMATION".

STAFF INFORMATION

- First Name: **
- Last Name: *Locker Clean-up
- Email Address: locker@schoolsoft.com
- Username (used for log in): locker
- Password: [masked]
- Confirm Password: [masked]

OTHER INFORMATION

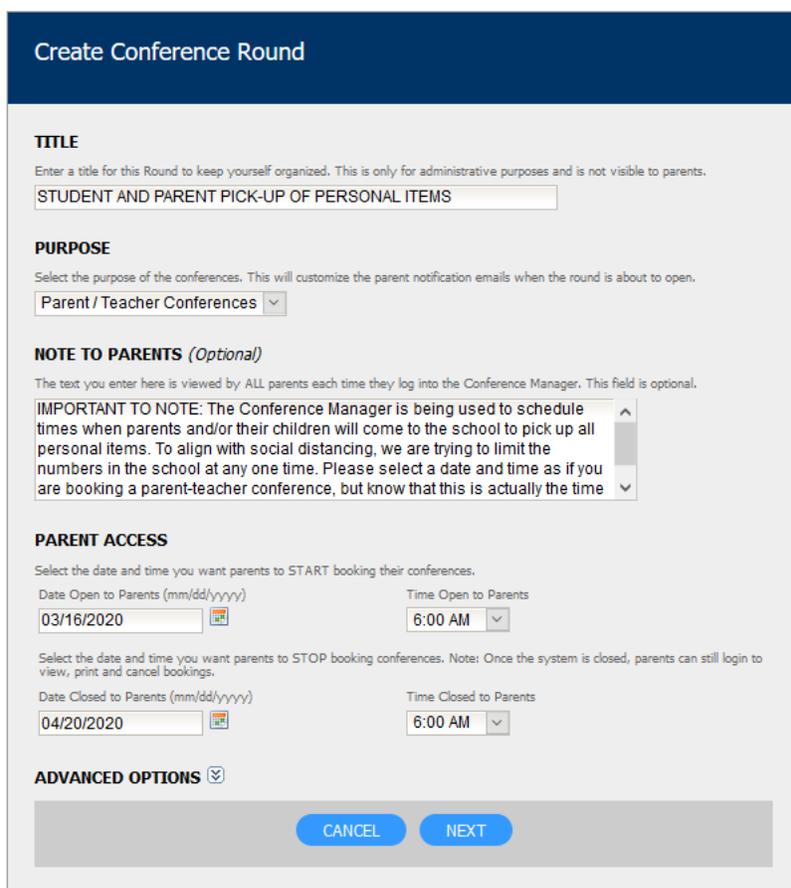
- Staff/Teaching Assignment: School
- Conference Location or NA: Time when personal items will be
- Status: Active
- Role: Teacher
- Visible to Parents: Yes
- Last Logged In: [empty]
- Logged In From: [empty]

Buttons: CANCEL, SUBMIT

Step 3 - Create a conference round for clearing out lockers. (Skip this step if you are adding a session to the current round that may already be set up for telephone conferences. If no conference round is currently set up, you will need to complete this step)

Follow the same process as you usually do for setting up a round of conferences, but we recommend calling the conference round something like “Scheduling Pick-up of Personal Items”. You will also want to add a NOTE TO PARENTS similar to “IMPORTANT TO NOTE: The Conference Manager is being used to schedule times when parents and/or their children will come to the school to pick up all personal items. To align with social distancing, we are trying to limit the numbers in the school at any one time. Please select a date and time as if you are booking a parent-teacher conference, but know that this is actually the time when personal items are picked up”.

The following screenshot is an example of how the Conferencing Round set-up might look.



The screenshot shows a web form titled "Create Conference Round". The form is divided into several sections:

- TITLE**: A text input field containing "STUDENT AND PARENT PICK-UP OF PERSONAL ITEMS".
- PURPOSE**: A dropdown menu set to "Parent / Teacher Conferences".
- NOTE TO PARENTS (Optional)**: A text area containing the text: "IMPORTANT TO NOTE: The Conference Manager is being used to schedule times when parents and/or their children will come to the school to pick up all personal items. To align with social distancing, we are trying to limit the numbers in the school at any one time. Please select a date and time as if you are booking a parent-teacher conference, but know that this is actually the time".
- PARENT ACCESS**: Two sets of date and time pickers. The first set is for "Date Open to Parents" (03/16/2020) and "Time Open to Parents" (6:00 AM). The second set is for "Date Closed to Parents" (04/20/2020) and "Time Closed to Parents" (6:00 AM).
- ADVANCED OPTIONS**: A section with a dropdown arrow.

At the bottom of the form are two buttons: "CANCEL" and "NEXT".

After you have completed the creation of the Conference Round window, click the NEXT button.



Step 4 - Creating a Conference Session that will allow the scheduling of the time blocks that parent and/or student will stop by the school to pick up personal items.

Note: If you are adding this session to an existing round (i.e. you skipped step 3), you add a session by clicking the CONFERENCES TAB and then scrolling down to the current round of conferences that is marked with a double-line border, and clicking the ADD SESSION button.

Creating a *Conference Session* allows you to create a schedule of when a parent and/or student might stop by the school to pick up personal items. You will need to decide how long you want the time blocks to be and how many people you want to come to the school during each time block. In the illustration below, there are 15-minute blocks of time set for parents and/or students to pick up personal belongings and a maximum of 30 slots that are available in each time block. There is 5 minutes of time that is allotted for transition between the groups of students and/or parents coming, which is set using the “Travel Time” setting. This means there will be 3 waves of up to 30 parents and/or students each hour, or 90 parents per hour. You will need to adjust these numbers based on your school size and circumstance.

The only staff member that should be selected for this Conference Session is the one you created in step 2. Also please note that the NOTE TO PARENTS is used to further advise parents of what is being done. In this instance it says “IMPORTANT TO NOTE: The Conference Manager is being used to schedule times when parents and/or their children will come to the school to pick up all personal items. To align with social distancing, we are trying to limit the numbers in the school at any one time. Please select a time as if you are booking a parent-teacher conference, but know that this is actually the time when we will expect you at the school to pick up personal items. To help prevent the spread of the Coronavirus, we ask parents and/or students to pick up personal items and leave the school as soon as possible.”



Edit Conference Session

STUDENT AND PARENT PICK-UP OF PERSONAL ITEMS

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

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

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.

<input type="checkbox"/> SELECT ALL	NAME	TEACHING ASSIGNMENT
<input checked="" type="checkbox"/>	*. *Locker Clean-up	School
<input type="checkbox"/>	C. Acorn	Kindergarten

You may want or need to repeat this process to set up multiple conference sessions if you are scheduling for a large school.



Step 5 – Communication

As mentioned above, the Conference Manager is designed to support the scheduling of Parent-Teacher Conferences. Although the suggested configuration should make it clear to parents what you are doing with the taking home of personal items, you will need to ensure you communicate what is happening to parents and staff. We recommend you send an email to all parents using your standard communication strategy and explain the way you are using the Conference Manager. Please ensure you inform staff as well.

If you are a school that already has an active conference round underway that parents have or are currently signing up for and you are adding a “locker clean-out” conference session as described in Step 4 it is essential you inform parents of this additional booking need.

