



System Admin Guide to the Conference Manager

Revised February 2025

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System Admin Guide to the Conference Manager

The SchoolSoft Conference Manager provides a comprehensive set of features that supports and enables the scheduling, communication and management of parent conferences that are conducted face-to-face, online using platforms like Zoom or Google Meet, or via the telephone. It also supports the school providing parents with the ability to choose from two or all three of these conference types. The interface was recently redesigned so that it is easier for parents who use the browser on their smartphone to book conferences. Visit the [parent support page](#) in the HELP CENTER to learn more.

This Guide provides a detailed overview of the process of creating and completing your round of Parent-Teacher Conferences. This guide assumes that you are a System Admin user of the Conference Manager and that you have logged in to perform the actions detailed throughout this guide.

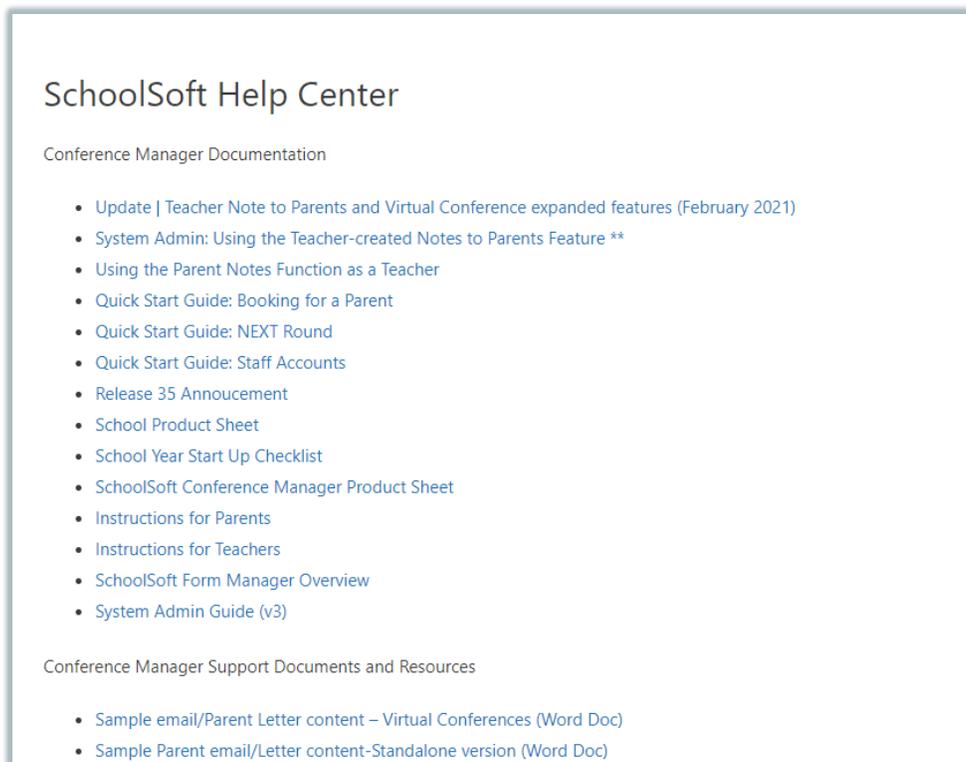
When you first receive confirmation from the SchoolSoft implementation team that your school's Conference Manager has been set up, you will be provided with detailed information on how the staff and parents access the Conference Manager. Your Conference Manager will be configured in one of three ways;

- **Stand-alone Configuration.** In this instance, the school's Conference Manager operates autonomously. The parents self-register for an account and they and the staff use the school's login page to access the school's Conference Manager login page.
- **District Mode.** In this configuration a school has its own unique Conference Manager but uses a "district URL" for parents to access a parent login page that is the same for any school using the Conference Manager within the district (or other similar organizational entity). This allows parents to have one Conference Manager account that can be used to login and access any school's Conference Manager where they have a child enrolled. Unlike parents, staff at the school will have a login page that is unique to that school.
- **PowerSchool Mode.** This configuration requires the authorization from the PowerSchool administrator for the Conference Manager to integrate with PowerSchool. This configuration involves a plug-in being installed in PowerSchool, which enables the Conference Manager to create staff and parent accounts from the information contained in PowerSchool. Staff will login to the Conference Manager using the school's URL and login page. However, parents do not use a Conference Manager account, rather they login to PowerSchool and then select the Conference Manager using PowerSchool's application launch icon.

Getting Help

The [SchoolSoft Help Center](#) can be accessed by any staff-member using the HELP CENTER button located in the top right banner, near the LOG OUT once they are logged into the Conference Manager. Here you will find:

- sample content for communication to parents
- on-screen videos designed for the system admin, staff and parents
- samples of the automated emails sent by the Conference Manager
- product updates and other documentation that helps ensure you and the school get the most from the from the Conference Manager.



SchoolSoft Help Center

Conference Manager Documentation

- [Update | Teacher Note to Parents and Virtual Conference expanded features \(February 2021\)](#)
- [System Admin: Using the Teacher-created Notes to Parents Feature **](#)
- [Using the Parent Notes Function as a Teacher](#)
- [Quick Start Guide: Booking for a Parent](#)
- [Quick Start Guide: NEXT Round](#)
- [Quick Start Guide: Staff Accounts](#)
- [Release 35 Announcement](#)
- [School Product Sheet](#)
- [School Year Start Up Checklist](#)
- [SchoolSoft Conference Manager Product Sheet](#)
- [Instructions for Parents](#)
- [Instructions for Teachers](#)
- [SchoolSoft Form Manager Overview](#)
- [System Admin Guide \(v3\)](#)

Conference Manager Support Documents and Resources

- [Sample email/Parent Letter content – Virtual Conferences \(Word Doc\)](#)
- [Sample Parent email/Letter content-Standalone version \(Word Doc\)](#)

SchoolSoft provides in-person support for Conference Manager system admin and office admin users. This support can be accessed by emailing support@schoolsoft.com. This can also be done by clicking the SUPPORT link displayed in the top right banner.

For other staff members and parent users, your school will be responsible for helping with issues. An email is generated back to the school as defined in the SCHOOL PROFILE (See the Confirming the set-up of your Conference Manager section below).



Terminology

System Admin users should be familiar with the following terms and concepts.

Conference Round Term used to describe the overarching configuration of a set of *conference sessions* or schedules that occur as part of a school’s regular efforts to keep parents informed of their child’s progress. For example, a school may have a *conference round* they call “Fall Parent-Teacher Conferences”. The Conference Manager makes setting up a *conference round* easy by walking you through the steps required to create the *conference round* and the conference session(s) and any common breaks associated with it. The Conference Manager only permits one *conference round* to be active at a time. A Conference Round can have an unlimited number of *conferences sessions*.

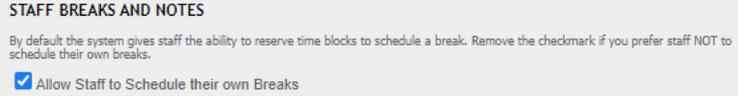
Conference Session A conference session is an entry that consists of the day, time and configuration which is tailored to meet the needs of that particular instance for Parent Teacher interviews. You can have as many sessions as you need to meet the needs of the Parent Teacher interview parameters. As an example, an elementary school might have a conference round that consists of three conference sessions:

- Wednesday 4-8 PM for parents of Kindergarten students
- Thursday 4-8 PM for parents of K-6 students
- Friday 8:30 AM – 2:30 PM for K-6 students

Conference Type The conference type is the format of the conference. The Conference Manager supports face-to-face, virtual and phone conference types. It is also possible for the school to select two or all three conference types and allow parents to select their preferred format when they book.

Common Break A common break is a set of time blocks that are blocked off so parents are not able to schedule during those times. In the example above, the school may have conferences that are 10 minutes in duration and decide to:

- Wednesday - allow the Kindergarten teachers to schedule their own break, so no common break is necessary. Allowing teachers to do their own breaks is in the *conference session*.



- Thursday - create a common break from 6-6:30 PM for teachers to have time for dinner.
- Friday – create a common break from 12– 12:40 PM as a lunch break.

System Admin User

This is the user role that has the highest level of access in the Conference Manager. The System Admin user has access to all the functionality of the Conference Manager, including the ability to create and delete *conference rounds*. Most schools chose to have one or two System Admin users. It is important that there be a limited number of staff who are designated as System Admin.

Office Admin User

This role has the ability to do all that a system administrator can, with the exception of creating, editing and deleting conference rounds. The Office Admin user does not have the CONFERENCES tab displayed after they log in. This role is typically provided to people in the school who assist with booking parents either for special reasons or if someone needs assistance.

Teacher user

This is the most common role and is given to those individuals who are directly involved in conducting parent-teacher conferences. By default, teachers are able to see appointments in their schedule, but are not able to book them. The system admin can allow teachers to book appointments on behalf of parents. This preference is set in the SCHOOL PROFILE tab.



Creating Conditions for Success

Properly set up, the SchoolSoft Conference Manager provides a customized platform for scheduling conferences that is simple and intuitive to use. The Conference Manager empowers your parents to create and coordinate their own conference schedules and provides you with a set of tools to easily and effectively manage all other aspects of Parent-Teacher Conferences. The best outcomes of Parent-Teacher Conferences arise when the Conference Manager is used along with best practices in planning and implementing Parent-Teacher conferences.

To help ensure a successful round of Parent-Teacher Conferences in your school, we offer up the following items to consider. Your experience, judgment and knowledge of your school community are ultimately the best to guide your decision-making regarding Parent-Teacher Conferences.

- Familiarize yourself with the Conference Manager well in advance of your next *conference round*. Also take a few minutes to browse the resources in the [SchoolSoft Help Center](#).
- Determine how many time slots will be needed to accommodate all parents and guardians who may be interested in attending conferences with a teacher. Our experience is that most schools, especially at the higher level, see an increase in the number of parents who book an appointment when they are able to book and manage their own schedule.
- Try to accommodate the greatest number of conference time blocks during the time that tends to be the most popular with your school community. It seems the majority of parents prefer evening time blocks, although this does depend on your community and other school circumstances.
- Pre-book any conferences that the school believes require special attention before the system opens to all parents. These should be few in number and include such things as a double time block for a parent whose child may have complex needs, a conference that requires a special resource like a sign-language interpreter or a learning strategist. These pre-bookings are normally completed by one of the office staff but are coordinated with teachers; however, the Conference Manager can be configured so that teachers are given the ability to book conferences within their schedule on behalf of parents.
- Communication is the key to success. Use whatever communication channels you normally use to inform your parents in advance of what the school is doing and how they can access your school's Conference Manager. SchoolSoft provides sample communication documents and links to videos in the [Help Center](#). This can be accessed using the [HELP CENTER](#) button, located in the top right of the screen once you are logged into the Conference Manager.
- Accommodate for parents who may not have access to the Internet. Our experience is that with the pervasive use of smart phones there is a diminishing number of families who do not have access to the Internet; however, you will still need to provide a means for those who can't access the Conference Manager. We suggest that you have parents without internet contact the school office and have the System Admin or Office Admin schedule those parents. Teachers can also be provided with the ability to book conferences, which is set in the SCHOOL PROFILE.
- Make accessing the Conference Manager as simple for parents to access as possible. For the first round of conferences scheduled using the Conference Manager, we recommend putting a link on your web site or sending an email to all parents with the link contained in it. If your school jurisdiction uses the version of the Conference Manager that is integrated with PowerSchool, parents just need to be informed that they access the Conference Manager from the Applications Launch Icon (which in MOST PowerSchool instances is in the upper right quadrant of the screen and looks like a box with an arrow extending diagonally up and to the right. Make



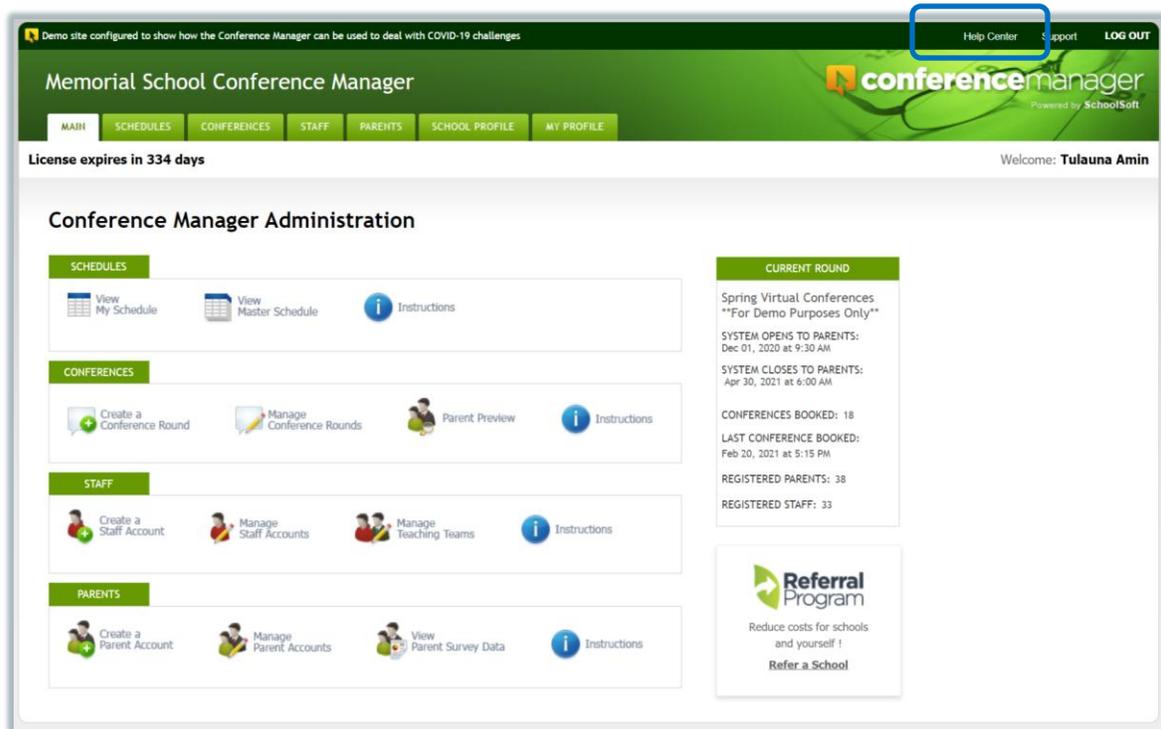
sure you check your PowerSchool parent portal to guide your parent to the proper location). Sample parent communication for both stand alone and PowerSchool versions of the Conference Manager are contained in the SchoolSoft [Help Center](#).

Part 1 – Basic Configuration and Staff Accounts

Confirming the Set-Up of your Conference Manager

Before proceeding further with the Conference Manager, take a moment and confirm the school profile by following these steps:

1. Log into the SchoolSoft Conference using the username and password that was provided in an email when the initial set-up was complete. After logging in you will land on the MAIN tab page, which displays a group of tabs and the panel of administrative controls as well as information that pertains to the current round of conferences. The tabs and panels provide you with access to the functions that enable you configure and manage the school's Conference Manager. If this is your first time logging into the Conference Manager, we recommend you take a few minutes to click on the [Help Center](#) link, located in the top right of the screen, and get a sense of the range of resources that are available to you and other staff users. Parents do not have access to the Help Center.



2. SCHOOL PROFILE tab.
3. Make any adjustments required using the screenshot on the next page as a guide. It is important that the SCHOOL PROFILE is revisited before each new *conference round* is created to ensure the information is accurate.
4. Click on SUBMIT at the bottom of the page to save the changes

License expires in 176 days

School Profile

Fill in the information below, then submit your changes:

CONFERENCE MANAGER INFO (Last Updated:)

Application Title

Application Sub-Title

Application URL

License Expiry Date
August 17, 2021

Student Population

Application Color Theme

ADDRESS

School Name

Division/District

Address

Address (Line 2) (optional)

City

Postal Code/Zip Code

Province/State

Country

Time Zone

CONTACT INFO

School Phone

Principal (or Main Contact) First Name	Principal (or Main Contact) Last Name	Principal (or Main Contact) Email Address
<input type="text" value="Heather"/>	<input type="text" value="Fox"/>	<input type="text" value="heather.fox@memorial.com"/>
Office Support Lead First Name	Office Support Lead Last Name	Office Support Lead Email Address
<input type="text" value="Heather"/>	<input type="text" value="Fox"/>	<input type="text" value="heather.fox@memorial.com"/>
Parent Support Contact First Name	Parent Support Contact Last Name	Parent Support Contact Email Address
<input type="text" value="Heather"/>	<input type="text" value="Fox"/>	<input type="text" value="heather.fox@memorial.com"/>
Staff Support Contact First Name	Staff Support Contact Last Name	Staff Support Contact Email Address
<input type="text" value="Heather"/>	<input type="text" value="Foxr"/>	<input type="text" value="heather.fox@memorial.com"/>
Billing Contact First Name	Billing Contact Last Name	Billing Contact Email Address
<input type="text" value="Cam"/>	<input type="text" value="Jones"/>	<input type="text" value="cam.jones@memorial.com"/>

PREFERENCES

Enable Teacher Filter
 Uses PowerSchool integration to display an initial pick list of only the teachers of a parent's child(ren).

When teacher filter is on, only show teachers whose start date and end dates are currently active in their sections.

Allow Teachers to Book Conferences

Enable Virtual Conferencing

Message to display to parents where a staff is fully booked in a session

Confirm the name you want for the Conference Manager

Confirm school name, address, time zone and phone number are correct

Confirm key contacts and emails listed are accurate. Pay particular attention to the information for the parent and staff support individuals as the support requests will be directed to the email address that is entered here. The support link is located in the top right corner of the Conference Manager Screen.



Check the desired preferences for the Conference Manager.

- *Teacher filtering* (Requires SchoolSoft-PowerSchool integration). Parent staff pick list includes only teachers who teach their child. This setting is found in the School Profile.
- *Allow Teachers to Book Conferences* will provide teachers with the ability to book a parent into a time slot. Useful if teacher is advance booking specific parents with unique circumstances or is otherwise involved in booking.
- *Enable Virtual Conferencing Support* must be checked if you are wanting to schedule conferences that take place using online meeting software. For more information

The Conference Manager will inform a parent when a teacher's schedule is full. You can add an additional instruction that will be included in that notification by adding the text here.

Part 2 - Creating and Configuring Staff Accounts

Before the first *conference round* can be configured you should ensure the staff accounts for the school have been created. When a staff account is created the SchoolSoft Conference Manager will automatically send an email to the staff member's email address specified in their account. This email includes information about the SchoolSoft Conference Manager, their login credentials, and a link to the login screen.

Once a staff account has been created, a staff member is able to manage their account using the MY PROFILE tab. Only a user with System Admin or Office Admin permissions can delete staff accounts.

Staff accounts can be created in one of three ways:

1. Set up manually (Click the STAFF tab and the ADD STAFF MEMBER button. See the [Quick Start Guide: Staff Accounts](#) located in the [SchoolSoft Help Center](#) for more details)
2. The school creates a CSV file using the SchoolSoft Staff Import template provided by the SchoolSoft Implementation Team or accessed in the [SchoolSoft Help Center](#). The CSV file is provided to SchoolSoft who imports the staff into the Conference Manager.
3. Imported from PowerSchool (Available only with Conference Manager PowerSchool implementations).

When a staff account is created an email is sent to the teacher informing them of the link to the Conference Manager as well as their login username and password, which can be assigned by the System Admin or can be randomly generated by the Conference Manager. A sample of all emails sent by the Conference Manager can be found in the [SchoolSoft Help Center](#).

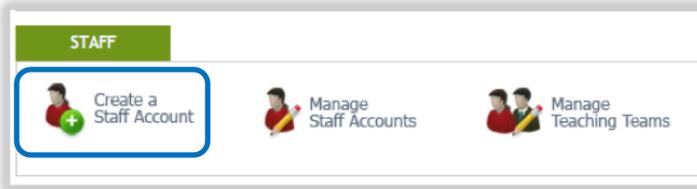
Once teacher accounts have been created, the Conference Manager can be configured to enable a range of functions for teachers, including:

- enabling the teacher to see an optional comment or question from the parent that is submitted as part of the process of the parent booking their conference, allowing the teacher to be better prepared for each conference
- providing a means for a teacher to provide a note to the parents who book an appointment with them
- providing the teacher's online meeting link to parents who have booked an appointment
- the teacher being able to click a button to send an email containing a meeting link to a parent when the online meeting is scheduled to commence
- adding a specialized staff member (such as a translator, counselor, resource teacher or member of the administration) to a specific conference booking
- reserving time blocks in a teacher's schedule to create a break or provide additional time for a conference that is anticipated to require more time

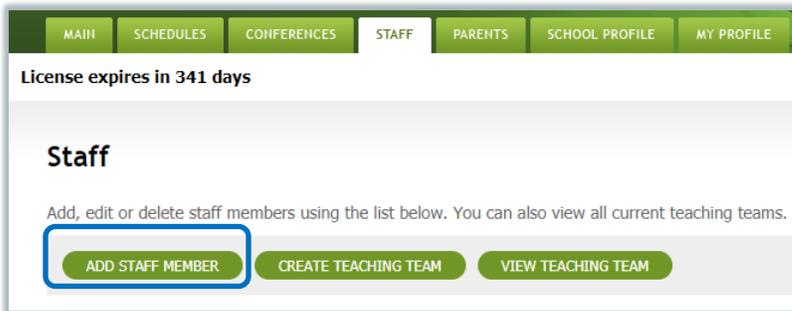
See the [Creating a Conference Round](#) for details of these settings.

Creating a Staff Account Manually

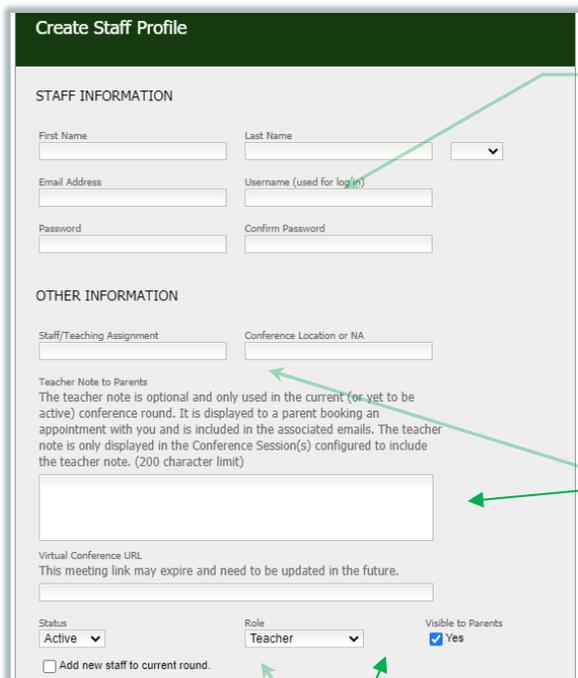
1. Click the CREATE A STAFF ACCOUNT from the MAIN tab



or click on the STAFF tab and the ADD STAFF MEMBER button.



2. Create a new staff account by providing the information shown below and clicking SUBMIT.



The **STAFF INFORMATION** section of the teacher account is required. The *Username* must be unique and is most often a repeat of the email address used for the teacher, but does not need to be. The choice of Username is particularly important for teachers who have a child attending the school as they must have a different *Username* for their teacher and parent account. The *Password* can be assigned or the field can be left blank and a random password will be created by the Conference Manager.

The **Staff Teaching Assignment** is required and should be short and descriptive (e.g. Gr. 4, Math, Counselor, PhysEd). **Conference Location** should contain the physical location where in-person conferences for the teacher take place. This field is not displayed in virtual conference bookings. The location should be updated by the teacher if the location changes. **The Teacher Note to Parents and Virtual Conference Link** are optional fields that are normally provided by the teacher.

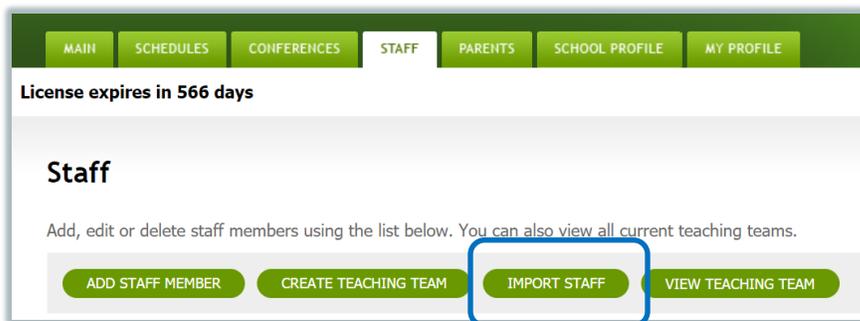
The **Status** should always be active, unless a teacher is on leave or would otherwise need to be prevented from logging in. **Role** should be set to teacher or office admin (see [terminology section](#) for detail). **Visible to Parents** must be checked if parents are to select and book appointments with this person. It should be unchecked if the person does not attend conferences or is not booked directly by parents, which often includes the principal. The **Add new staff to current round** field is checked if a conference round is underway when you create the account.

Importing Staff from PowerSchool (PowerSchool Mode Only)

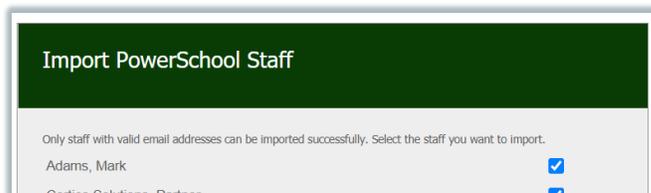
In PowerSchool mode the Conference Manager can import the desired staff accounts from PowerSchool rather than using the ADD STAFF MEMBER button. When a staff member is imported, an account is created and linked to PowerSchool. The staff member will receive an email informing them of the account along with the link to the Conference Manager, their username and a temporary password. **It is important the staff member complete the required account fields by entering in their teaching assignment, room location of conference, and virtual conference link if applicable.**

Follow these steps to import and create staff accounts in the Conference Manager.

1. Click the STAFF TAB and the IMPORT STAFF button. This button will only appear if the plug-in has been installed and a data link exists between the PowerSchool and the Conference Manager.



2. A list of all staff accounts that are available to import from PowerSchool will be displayed. Each name will have a checkbox beside it. Select the staff you want to import by placing a checkmark in the checkbox and click SUBMIT.



3. The staff import process will create an account for each of the imported staff members and will show the account was linked to PowerSchool by displaying the  icon beside their name.



In the future, if new staff need to be added, repeat steps 1 to 3. If staff leave the school, you can use the DELETE button on the STAFF tab to remove them

Managing Staff Accounts

The staff list is key to being able to manage staff accounts. The staff list can be accessed by clicking on the MANAGE STAFF ACCOUNTS in the MAIN tab or on the STAFF tab. Once displayed, the staff list can be reviewed or edited as needed to ensure staff accounts are accurate. The screenshot below describes the components of the staff list. Below that is what you see if you click a teacher's schedule icon.

Icon is displayed if the teacher is part of a teaching team (see next page for details on creating teaching teams).

Clicking the VIEW SCHEDULE to view a specific teacher's schedule. (see screenshot on the lower half of the page.

Use the EDIT or the DELETE button to complete the desired action. Deleting a staff member's account is permanent and cannot be undone.

VIEW STAFF LIST Total: 33

NAME	TEAM	TEACHING ASSIGNMENT	LOCATION	VIEW SCHEDULE	ACCOUNT
Acorn, Chester VC		Kindergarten	Kinder Room		EDIT DELETE
Amin, Tulauna VC		System Admin	NA		EDIT DELETE
Anderson, Kevin VC		Gr. 5	Room 126		EDIT DELETE
Armstrong, Sharon		Fine Arts	Room 131		EDIT DELETE

The "VC" badge indicates the teacher has entered an online meeting link in their profile.

The Teacher Detailed Schedule Page (Part 1)

Staff Conferences - Jane Barnett

To view a list of current conference bookings, please click on the dropdown below.

[VIEW STAFF LIST](#)

Click to return to the staff list.

Available conference sessions Thursday April 21 - Parent C

Print Print (No Comments)

Conference Location: **Rm 222**

Checked means timeslot is available for a parent to book. Unchecked means timeslot is not available and appear booked to a parent and is marked *reserved* for the teacher.

Click to print schedule.

AVAILABLE	TIME	STUDENT NAME	TEACHER NAME	PHONE	TYPE	PHONE	BOOK	RESERVE
<input type="checkbox"/>		Jan Parker	Brant Parker		Virtual	250-932-7268	BOOK	RESERVE
<input type="checkbox"/>		Jan Parker	Brant Parker		Virtual	250-932-7269	BOOK	RESERVE
<input checked="" type="checkbox"/>	9:20 AM						BOOK	RESERVE
<input checked="" type="checkbox"/>	9:40 AM	Jenna Parent	Adrienne Parent	Mr. D. Chow	Face to Face	403-555-1212	BOOK	RESERVE
<input checked="" type="checkbox"/>	10:00 AM						BOOK	RESERVE
<input checked="" type="checkbox"/>	10:20 AM						BOOK	RESERVE
<input type="checkbox"/>	10:40 AM	James Johnston	Hazel Jonston		Phone	250-932-6137	BOOK	RESERVE

Displays the type of conference. In this illustration the school is allowing parents to choose their preference, so the types vary by parent.

The BOOK button is displayed when the Allow Teachers to Book is set as a

The Teacher Detailed Schedule Page (Part 2)

Staff Conferences - Jane Barnett

To view a list of current conference bookings, please select a session from

[VIEW STAFF LIST](#)

Available conference sessions: Friday April 30 - Virtual Conferences - All Grades (demo of link in confirmation er)

Print | Print (No Comm)

AVAILABLE	TIME	COMMENT	OTHER ATTENDEES	PHONE	
<input checked="" type="checkbox"/>	9:00 AM				BOOK RESERVE
	9:15 AM				EDIT CANCEL APPT.
	9:30 AM				EDIT CANCEL APPT.
<input checked="" type="checkbox"/>	9:45 AM				BOOK RESERVE
<input checked="" type="checkbox"/>	10:00 AM	Kainat Mominza	Asma Mominza	ADD 234-567-8902	EDIT CANCEL APPT.
<input checked="" type="checkbox"/>	10:15 AM				BOOK RESERVE
<input type="checkbox"/>	10:30 AM	Common break			CANCEL APPT.
<input type="checkbox"/>	10:45 AM	Common break			CANCEL APPT.
<input type="checkbox"/>	11:00 AM	Common break			CANCEL APPT.
<input checked="" type="checkbox"/>	11:15 AM				BOOK RESERVE
<input checked="" type="checkbox"/>	11:30 AM				BOOK RESERVE
<input type="checkbox"/>	11:45 AM	Maria Hernandez	Juanita Hernandez	ADD 987-654-3210	EDIT CANCEL APPT.
<input type="checkbox"/>	12:00 PM	Reserved by teacher			CANCEL APPT.
<input checked="" type="checkbox"/>	12:15 PM				BOOK RESERVE

If the teacher has used the ADD button and added another staff member to a conference, the other attendee(s) is listed and the location of the conference is shown in **RED** to ensure the teacher knows that appointment takes place in another location.

If a *Common Break* has been scheduled this is displayed. A break time block can be made available by adding a checkmark to available column.

The BOOK button is displayed when the Allow Teachers to Book is set as a preference in the SCHOOL PROFILE.

The *comment* icon is displayed if the Allow Parents Comments option is checked in the conference session settings. Comment displays when clicked or hovered over.

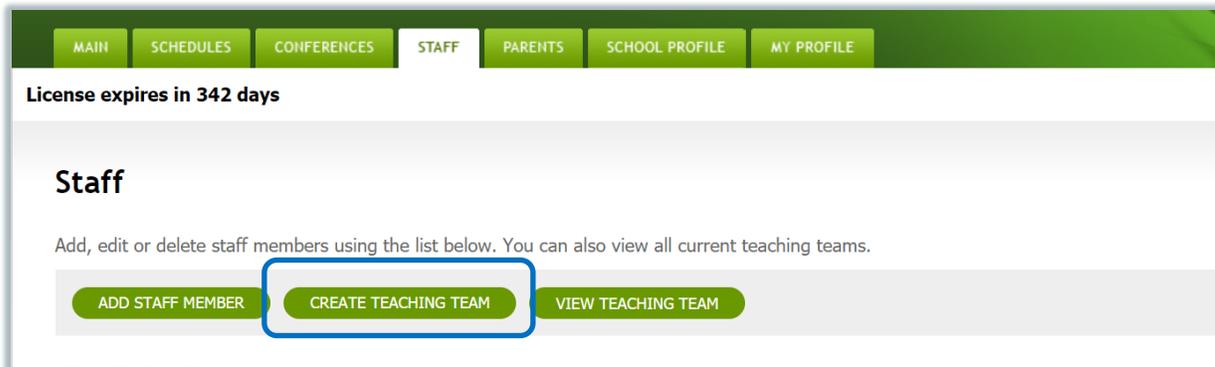
The ADD button allows a teacher or system admin to add another staff member to conference by the teacher or System Admin. Here E. Sanchez, an interpreter, has been added.

Setting up a Schedule for a Teaching Team who Conduct Conferences Together

If you have teachers who work in teams and will be conducting conferences together you can create one schedule that will apply to all members of that team. This can only be done once all teacher accounts in the team have been created. When viewing the teacher's schedule each member of the team will see the booking in their calendar but the team will interview together.

Creating a Teaching Team

1. Click on the STAFF tab and the CREATE TEACHING TEAM button.



2. Select the staff members that make up the team by placing a checkmark beside the name of each member. Please note that only one *teaching team* can be created at a time.
3. Enter the location where the team will be conducting conferences and the team assignment needs to be defined for the team. If the team is conducting the conferences virtually, you may want to simply put "Virtual" or "Online" as the location.
4. Enter the teaching team's teaching assignment and click submit.

The form is titled "D. Westwood Gr. 6". It has two sections: "ASSIGN A TEAM CONFERENCE LOCATION" and "ASSIGN TEAM TEACHING ASSIGNMENT". The first section has a text input field with "Room 14" entered. The second section has a text input field with "Grade 5 Team" entered. At the bottom, there are "CANCEL" and "SUBMIT" buttons.

Once submitted, on the STAFF tab you will see a team icon displayed by each teacher's name who is currently assigned to a team.

VIEW STAFF LIST Total: 32

NAME	TEAM	TEACHING ASSIGNMENT	LOCATION	VIEW SCHEDULE	ACCOUNT
Acorn, Chester VC		Kindergarten	Tiny Room		EDIT DELETE
Amin, Tulauna VC		System Admin	NA		EDIT DELETE
Armstrong, Sharon VC		Fine Arts	Room 131		EDIT DELETE
Barb, Rhianna VC		Gr. 4	Room 183		EDIT DELETE
Barnett, Jane VC		Gr. 3	Rm 222		EDIT DELETE

IMPORTANT INFORMATION | Teaching Teams Conducting Virtual Conferences and/or Using the Note to Parents Feature

Meeting Room Link for Teaching Teams

It is important to know that when virtual conferences are being conducted, each team has a person assigned the role of virtual “*Meeting Room Owner*”. This person’s Virtual Conference URL is shared with parents and other members of the team as the team’s meeting room link. By default, the person on the team whose last name is first on the staff list (alphabetically) will be assigned the role of virtual *Meeting Room Owner*. The *Meeting Room Owner* can be confirmed or changed by the System Admin by scrolling to the bottom of the STAFF tab. It is important that the Meeting Room Owner know they need to create a Virtual Conference Link on behalf of their team. It is recommended that they do this before parents begin booking.

The screenshot shows how teams are listed in teaching the teams section at the bottom of the STAFF tab.

TEAM MEMBERS	ASSIGNMENT	LOCATION	VIRTUAL MEETING ROOM OWNER	
D. Doolittle, S. Sarhar VC	Phys. Ed.	Gym Office	Doolittle, Dorothy	EDIT DELETE OWNER

The current Virtual Meeting Room Owner is displayed here. Click the OWNER button to change the Meeting Room Owner. By default, the owner is the person whose last name is first when sorted alphabetically.

Teacher Note for Teaching Teams

Similarly, if using the Note to Parents feature for team conferences, the *Meeting Room Owner* should compose the note on behalf of the team in the **Teacher Note to Parents** field on their MY PROFILE tab. The screenshot below shows the location of the two fields in the staff profile. Please note that *Virtual Conferences* and the *Note to Parent* features must be set to active for these features to be used by teachers. (*Note to Parent* is turned on in the session settings. *Virtual Conferences* must first be enabled in the SCHOOL PROFILE Preferences AND then checked as a conference session setting.)

Edit Staff Profile

STAFF INFORMATION

First Name: Last Name: Mrs.

Email Address: Username (used for log in):

Password: Confirm Password:

OTHER INFORMATION

Staff/Teaching Assignment: Conference Location or NA:

Teacher Note to Parents
The teacher note is optional and only used in the current (or yet to be active) conference round. It is displayed to a parent booking an appointment with you and is included in the associated emails. The teacher note is only displayed in the Conference Session(s) configured to include the teacher note. (200 character limit)

You child will be sharing his/her passion project following your parent-teacher conference.

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

By default, the Virtual Conference will use the *Virtual Conference URL* located in the Meeting Owner’s profile.

By default, the Virtual Conference parent confirmation email will include the *Teacher Note to Parents* that has been entered in profile of the Meeting Owner. teaching team.

Editing and Canceling a Teaching Team

1. From the MAIN tab click the MANAGE TEACHING TEAMS or click the STAFF tab and click the VIEW TEACHING TEAMS button.
2. You will see the CURRENT TEAM table. Click the EDIT button beside the team you wish to edit. Click the DELETE button if you wish to cancel that team.

TEAM MEMBERS	ASSIGNMENT	LOCATION	VIRTUAL MEETING ROOM OWNER	
D. Doolittle, S. Sarhar VC	Phys. Ed.	Gym Office	Doolittle, Dorothy	EDIT DELETE OWNER
S. Armstrong, S. Parker VC	Fine Arts Team	Music Room	Armstrong, Sharon	EDIT DELETE OWNER

The OWNER button allows you to change the Meeting Room Owner. The Meeting Room Owner is the person who acts on behalf of the team to set the Virtual Conference URL and Teacher Note to Parents. By default, the owner is the person whose last name is first when sorted alphabetically. Only the System Admin can change the Meeting Room Owner. See the previous page for details.

Print All Staff Schedules

Staff schedules can be bulk printed with or without comments. Click on the SCHEDULES tab and click the desired report format as shown below.

Choose a Teacher

To view a list of available teachers, please select a session below:

VIEW MY SCHEDULE

VIEW TEACHER LIST

Print ALL Staff Print ALL Staff (No Comments)

Part 3 – Creating and Managing a Conference Round

Once you have confirmed the information in the SCHOOL PROFILE tab is accurate and staff accounts have been created, you are now ready to create a round of conferences.

Memorial School Conference Manager

MAIL | 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

VIEW | COPY | 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

Once a *conference round* is created, the high-level details are displayed for quick review. If there are more than one *conference rounds* 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. The EDIT button is only accessible for a Conference Round that is current. A *conference session* can also be added using the ADD SESSION button. **Note you cannot make changes to a conference session once bookings have been made 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. Clicking the CREATE NEW CONFERENCE ROUND will launch the Conference Wizard. This will take you through the steps of creating a *Conference Round*. A conference round can also be created using the COPY button beside a Conference Round from the past that you want to replicate. The process is similar to the CREATE NEW CONFERENCE ROUND BUTON, except it will prepopulate the fields to save you time. Field such as dates, times and the staff participating in the conference sessions will need to be manually entered to complete the creation of the new conference round.

2. Complete the CREATE CONFERENCE ROUND form using the information below as a guide.

Create Conference Round

TITLE

Enter a title for the Round to keep yourself organized. The day prior to the round opening, parents will receive an automated email from the system indicating when the Conference Manager will be open for booking. The text you enter in this field is visible to parents in the subject line of this email.

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

PARENT REMINDER EMAIL OPTIONS

When the checkbox is selected the system will automatically send an email to all registered parents the 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)

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

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 who have an account to receive an email informing them booking will be occurring soon. 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.

- 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	

CANCEL **BACK** **NEXT**

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](#)).

6. 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 CONTINUE to create another session or CLOSE WINDOW if you are done.

CLOSE WINDOW **CONTINUE**

- Once you have created all the desired sessions and click the CLOSE WINDOW button, you will be on the CONFERENCES tab of the System Admin 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*. It is always best to make any changes before any bookings are made as not all settings can be changed after booking begins.

Memorial School Conference Manager

MAIN SCHEDULES **CONFERENCES** STAFF PARENTS SCHOOL PROFILE MY PROFILE

License expires in 20 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**** EDIT

Open: Saturday October 09, 2021 at 09:30 AM

Close: Tuesday April 26, 2022 at 06:00 AM

ADD SESSION EXPORT CONFERENCES

TITLE	DATE	START	FINISH	TYPE	COMMON BREAK	SESSION
CAM TEST	Fri, Dec 10, 2021	10:00 AM	1:58 PM	Face 2 Face	EDIT BREAK	EDIT
Face-to-face Conferences	Thu, Apr 28, 2022	3:00 PM	7:30 PM	Face 2 Face	EDIT BREAK	EDIT
Phone Conference Option Conferences	Fri, Apr 29, 2022	8:30 AM	2:30 PM	Phone	EDIT BREAK	EDIT
Virtual Conferences - All Grades	Fri, Apr 29, 2022	6:00 PM	8:25 PM	Virtual	EDIT BREAK	EDIT
Virtual Conferences - All Grades (Using Start NOW button)	Sat, Apr 30, 2022	9:00 AM	2:55 PM	Virtual	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.

What to do when a teacher teaches at two schools that have parent conferences at the same time
 See the [Help Center](#) for the document [Configuring the Conference Manager for a teacher who teaches in two schools](#). It includes details on how to coordinate schedules to avoid double bookings.

About Virtual Conferences

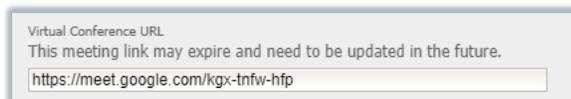
The Conference Manager supports the scheduling of Virtual Conferences using any web-based online meeting software like Google Meet, Zoom and Microsoft Teams. In order for the Conference Manager to manage Virtual Conferences, the feature must be enabled in the PREFERENCES section of the SCHOOL PROFILE.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



PREFERENCES

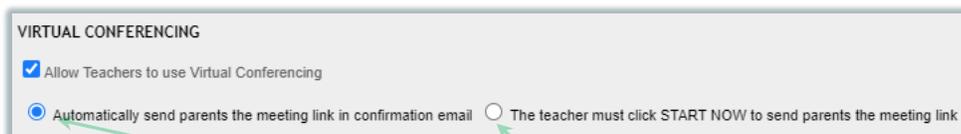
- Enable Teacher Filter (PowerSchool District Mode Only)
- Allow Teachers to Book Conferences
- Enable Virtual Conferencing Support

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

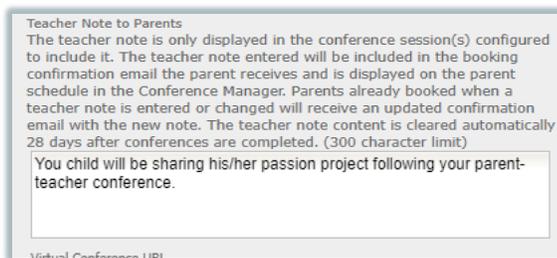
The first and recommended option in configuring the conference session is to have parents receive the meeting link immediately in the booking confirmation email and the attachment that allows a parent to add the appointment to their calendar application. The link is also displayed in the reminder emails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

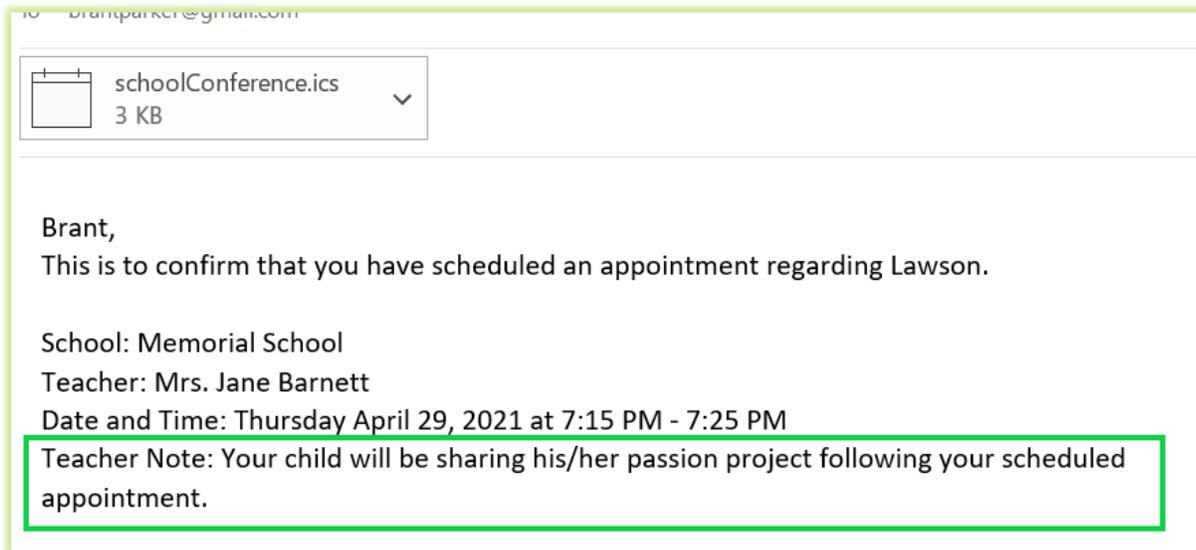
When this feature is checked in the *conference session(s)* settings, it allows a personalized message from a teacher (or System/Office Admin on behalf of a teacher) to be passed along to parents. Specifically, the message is included in the confirmation and reminder emails sent by the Conference Manager 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. It is important to note that the teacher note can be a maximum of 300 characters and is automatically deleted 28 days after the conference round concludes. The deletion process helps ensure old teacher notes are not displayed in an upcoming conference round as long as it occurs 28 days after the conclusion of the previous conference round.



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.

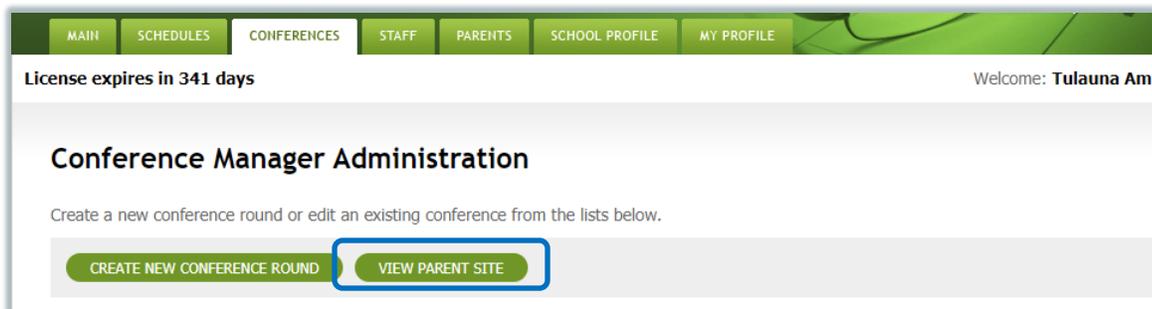
If you have enabled this feature, you can refer staff interested in using it to the "[Using the Parent Notes Function as a Teacher.PDF](#)" resource located in the [SchoolSoft Help Center](#).

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.



Part 4 – 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.

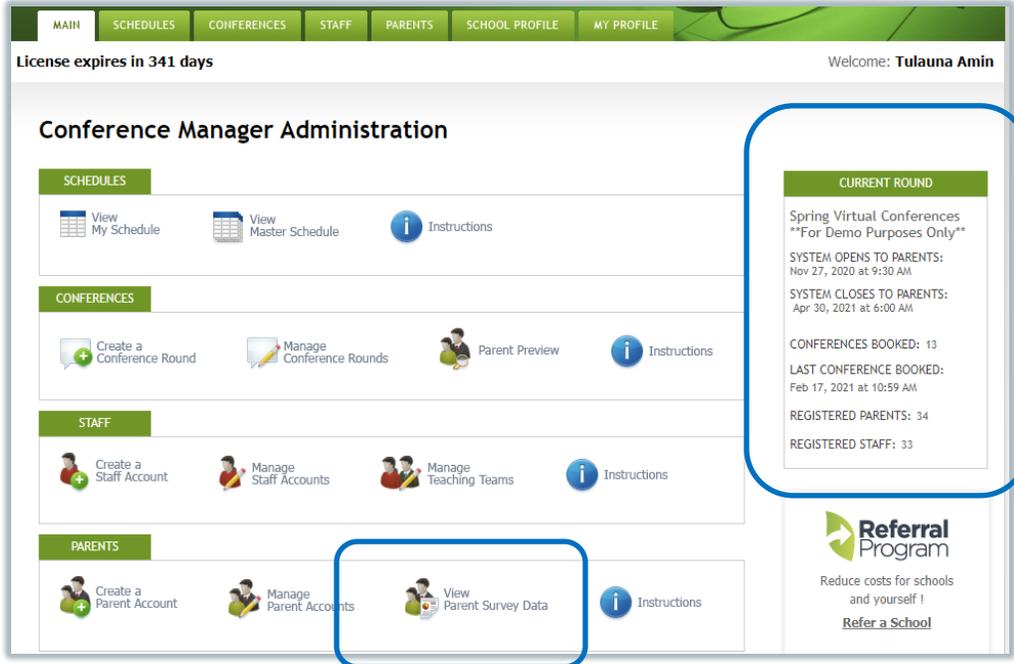
Staff will need to know:

- 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.

Part 5 – Managing Parent-Teacher Conference Bookings

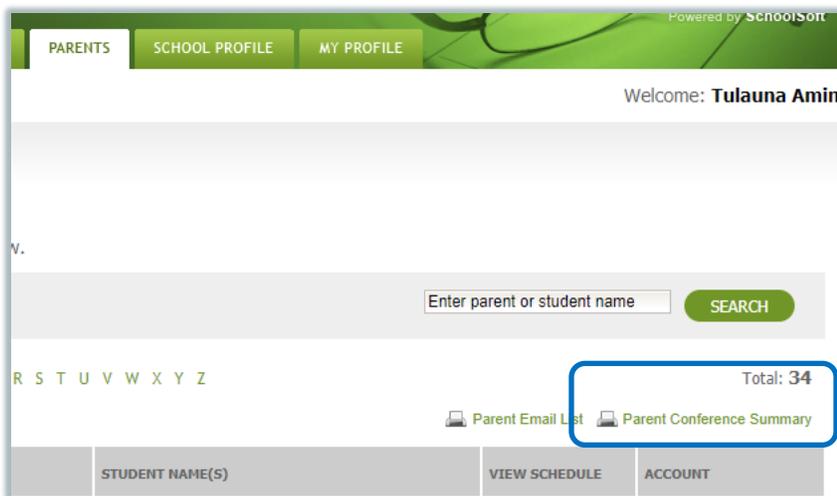
Checking on how Conference Bookings are Proceeding

Once conferences are underway, the System Admin and Office Admin can keep their finger on the pulse of how bookings are proceeding by looking at the CURRENT ROUND box on the right side of the screen. It shows real-time data on system opening and closing dates for parents, how many conferences have been booked and when the last booking occurred. It also shows the number of registered parents and staff.



Near the bottom of the page there is an option to view the Parent Satisfaction and Usability Survey data. This summarizes the Parent Survey that is provided as an option for parents to complete after completing their first booking(s) using the Conference Manager. By using the data from these two data sources, the System Admin can get a high-level view of how the booking of Parent-Teacher Conferences is proceeding.

If the School Administrator or System Admin is wanting to drill down into more detail, they can view and download a report of parent bookings that shows the parent and the number of bookings each has made. This report is accessed on the PARENTS tab as shown below.



Using the Master Schedule

The VIEW MASTER SCHEDULE icon on the MAIN tab or the SCHEDULES tab allows the system admin or office admin user to create custom views of *conference sessions* and view the teachers' schedules and see the associated bookings.

Creating a View of the Master Schedule

1. Click the VIEW MASTER SCHEDULE icon on the MAIN tab or click the SCHEDULES tab.
2. Select the desired *conference session* from the drop-down list.
3. Put a checkmark beside the teachers whose schedules you wish to view, or check SELECT ALL.
4. Scroll to the bottom of the page and click the NEXT button and the selected teachers' schedules will be displayed in a Master Schedule grid.
5. Clicking the BACK button below the *Master Schedule* will allow you to generate a new Master Schedule. You can repeat steps 2-4 to generate a new view of the schedules.

Components of a Master Schedule



Master Schedule

VIEW MY SCHEDULE

Print View by Student Last Name Highlight Conference Type: Face-to-Face Phone Virtual None

Thursday April 21 - Parent Choice of Format

i Conferences are 10 minutes long with 5 minutes in between.

	K. Anderson	S. Armstrong	R. Barb Gr. 4	J. Barnett Gr. 3
9:00			9:00	9:00
9:15			Jeffries	
9:30			Parent	
9:45			9:45	9:45
10:00			Mominza	
10:15			10:15	10:15
10:30	Break	Break	Parker	Break
10:45	Break	Break	Break	Break
11:00	Break	Break	Break	Break
11:15	Break	Break	Break	11:15
11:30	11:30	11:30	11:30	11:30
11:45	11:45	11:45	11:45	Hernandez
12:00	Break	Break	Break	Reserved

If a System Admin user also has a schedule of conferences, the user can click this button to access their personal schedule.

If a conference session is configured, any allowed conference type can be highlighted in the Master Schedule by selecting the radio button that matches the desired conference type.

The *master schedule* can be printed. Because of printer limitations, we recommend that less 12 or fewer teachers be selected if printing a master schedule.

The time configuration of a time-slot is always displayed at the top of a master schedule.

An available time-slot has a white background and displays the start time. A booked time-slot has a dark color and displays the name of the parent or student, depending on the drop-down preference selected. Hovering over the time-slot will display more detail.

Time-slots that are designated as a break are displayed as such with a light color. A time-slot reserved by the teacher or system admin for the teacher is displayed with a grey background.

TIP If you are in the *master* schedule and you wish to quickly access an individual teacher’s schedule, you can click the teacher’s name. You can also reserve time blocks by clicking the STAFF tab and then schedule icon for that teacher. The uncheck the time-slot(s) you wish to reserve for the teacher. To return from the *master* schedule click the VIEW MASTER SCHEDULE button.

Editing or Canceling a Conference Appointment

1. You are able to view, cancel or edit details pertaining to a booked conference by clicking on the desired booking in the *Master Schedule*.
2. A pop-up box will appear with the details pertaining to the conference appointment.
3. You can make the appointment edits desired or you can cancel the appointment by clicking the CANCEL APPT button. If you cancel the conference the parent will be sent a notification email.

Booking an Appointment Using the Master Schedule

Sometimes a parent will need to book an appointment over the phone. A booking can be made on behalf of a parent by accessing the desired *conference session* and teacher(s). To complete the booking do the following:

1. Click on an available time-slot for the desired teacher.
2. In the dialogue box that appears enter the first or last name of the parent and see if the parent appears in the search results.

The screenshot shows the 'Make a Booking' interface. At the top, it displays 'CONFERENCE DETAILS' for Mr. C. Acorn on Friday, April 30, 2021, at 10:00 AM. Below this, there is a search bar with 'Johnstone' entered and a 'SEARCH' button. To the right of the search bar is an 'ADD PARENT' button. A callout box points to this button with the text: 'The ADD PARENT button is used to create an account for a parent whose name does not appear in the list after being searched.' Below the search bar, it says 'Total: 1'. Underneath is a table titled 'REGISTERED PARENTS/GUARDIANS' with columns for 'LAST NAME', 'FIRST NAME', and 'EMAIL'. The table contains one entry: Johnstone, Hazel, hazel69682a@ijj45.com. To the right of this entry are 'SELECT' and 'EDIT' buttons. A callout box points to the 'SELECT' button with the text: 'If the parent name appears in the search, use the SELECT BUTTON to advance to the Booking window.' At the bottom of the interface is a 'CANCEL' button.

If the parent’s name appears in the search list, click the SELECT button to the right of their

name and skip to step 4. If the parent does not appear in the list you will need to click the ADD PARENT button create an account for the parent, then move on to step 3.

3. Create an account for the parent following these steps.
 - a. In the ADD PARENT form that appears you must, at minimum, complete the fields for the first and last name of the parent and their child(ren) and can include the phone number. With the minimal information entered you can now book the appointment on behalf of the parent. The parent name will now appear in the parent list; however, the parent will not have an account so will still need to be booked manually in future *conference rounds*.
 - b. If the parent also has an email address and access to the internet you can input that information and create an account for the parent. We recommend you use their email address as their *Username*. If an account is created the Conference Manager will send the parent a welcome email that includes the access information for their account, including a temporary password.
4. You are now in the CONFERENCE DETAILS form and can complete the booking using the information in the text boxes below.

The screenshot shows the 'CONFERENCE DETAILS' form. At the top, it displays the teacher's name (Mr. C. Acorn), the date (Thursday Apr 21, 2022), and the start time (10:00 AM). Below this, there are three main sections: 'Student Info' with a dropdown menu showing 'James Johnston'; 'Parent/Guardian Info' with the name 'Hazel Johnstone' and email 'hazel69682a@tjj45.com'; and 'Conference Type' with three radio button options: 'Face-to-Face Conference', 'Phone Conference', and 'Virtual Conference'. A 'Phone Number' field is present with a note: 'Please enter a phone number that the parent can be contacted by the teacher'. At the bottom, there is a 'Comments or Questions (Optional)' text area and two buttons: 'SUBMIT' and 'CLOSE WINDOW'. Three callout boxes provide additional information: the first points to the student dropdown, the second points to the radio buttons, and the third points to the phone number field.

CONFERENCE DETAILS

Teacher Mr. C. Acorn
Date Thursday Apr 21, 2022
Start Time 10:00 AM

Student Info
Name James Johnston

Parent/Guardian Info
Hazel Johnstone
hazel69682a@tjj45.com

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.

SUBMIT CLOSE WINDOW

If the parent has more than one child in the school, use the drop-down list to select the child.

If the conference session is set up to allow parents to select from 2 or 3 conference types, the radio buttons will be displayed which allow a preferred format to be selected. **If the conference session is for only one conference type, then no radio buttons will appear.**

Regardless of the type selected, a phone number is required so the parent can be contacted by the school if required.

5. Click the SUBMIT button and you will be returned to the *Master Schedule*. The appointment should now appear in the time-slot for the teacher you selected. The parent will receive a confirmation email sent to the address associated with their account.

Reserving a Time-Slot Using the Master Schedule

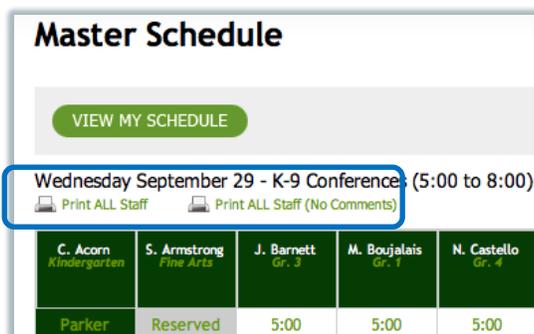
A specific time-slot can be designated as reserved for a teacher, which means it will not be available for the parent to book. To reserve a time block:

1. Select the teacher(s) for whom you wish to reserve a time-slot.
2. Click the available time-slot you wish to reserve. This cannot be a time-slot that has already been booked by a parent.
3. Click the RESERVE link in the MAKE A BOOKING form and click SUBMIT.
4. The time-slot selected should display as reserved on the *master schedule*.

TIP You can also reserve time blocks by clicking the STAFF tab and then the schedule icon for that teacher. Then uncheck the time-slot(s) you wish to reserve for the teacher. You can access a teacher's detailed schedule directly from the *master schedule* by clicking their name. Clicking the VIEW MASTER SCHEDULE button brings you back.

Print Schedules from the Master Schedule

Staff conference schedules can be printed out with and without parent comments being displayed. You can print these from any *master schedule* page. Individual teacher schedules can be printed from their detailed schedule page. This page can be accessed by clicking their name in the top row of the *master schedule*.



The screenshot shows a 'Master Schedule' interface. At the top, there is a 'VIEW MY SCHEDULE' button. Below it, a date and time range are displayed: 'Wednesday September 29 - K-9 Conference (5:00 to 8:00)'. There are two print options: 'Print ALL Staff' and 'Print ALL Staff (No Comments)'. Below this is a table with five columns representing different staff members:

C. Acorn Kindergarten	S. Armstrong Fine Arts	J. Barnett Gr. 3	M. Boujalais Gr. 1	N. Castello Gr. 4
Parker	Reserved	5:00	5:00	5:00

Part 6 - Managing Parent Accounts

The Conference Manager can be configured in one of three ways. It can be configured:

- as a stand-alone application for an individual school,
- as a common application across schools in a district,
- or integrated with PowerSchool.

In the first two configurations, parent accounts are easily managed within the Conference Manager. In PowerSchool integrations, the parent accounts are not created in the Conference Manager, but rather are created by pulling the parent information from their PowerSchool web access accounts.

Creating a New Parent Account

PowerSchool Mode only If you are using the Conference Manager in PowerSchool mode, we recommend you complete the import parent accounts and confirm the process was successful well in advance of your conferences commencing. To import parents, click the PARENTS tab and the IMPORT POWERSCHOOL PARENTS button. This will create a parent account for each parent with a PowerSchool web access account.

Add, view or edit parent profiles from the list below.

ADD PARENT

IMPORT POWERSCHOOL PARENTS

Enter parent or student name

SEARCH

In Stand-alone and District mode parents access the Conference Manager by first creating an account by clicking the REGISTER NOW button on the parent log-in page for the school or district. In spite of this, there will be times when a system admin or office admin user of the Conference Manager needs to create a parent account. In these circumstances, the parent is normally there in person or on the phone.

PowerSchool Mode Creating a parent account in the PowerSchool integration is intended to create a limited parent record so a conference can be booked on a parent's behalf. This is necessary when the parent has not created a PowerSchool Web Access account. Parent accounts created this way can only be accessed by the system admin or office admin.

To create a parent account, you need to:

1. Click the CREATE A PARENT ACCOUNT on the MAIN tab or the ADD PARENT button on the PARENTS tab.
2. Use the CREATE A PARENT web form to create the account.

Create a Parent

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)

Username (used for log in)

Password Confirm Password

Status
Active ▼

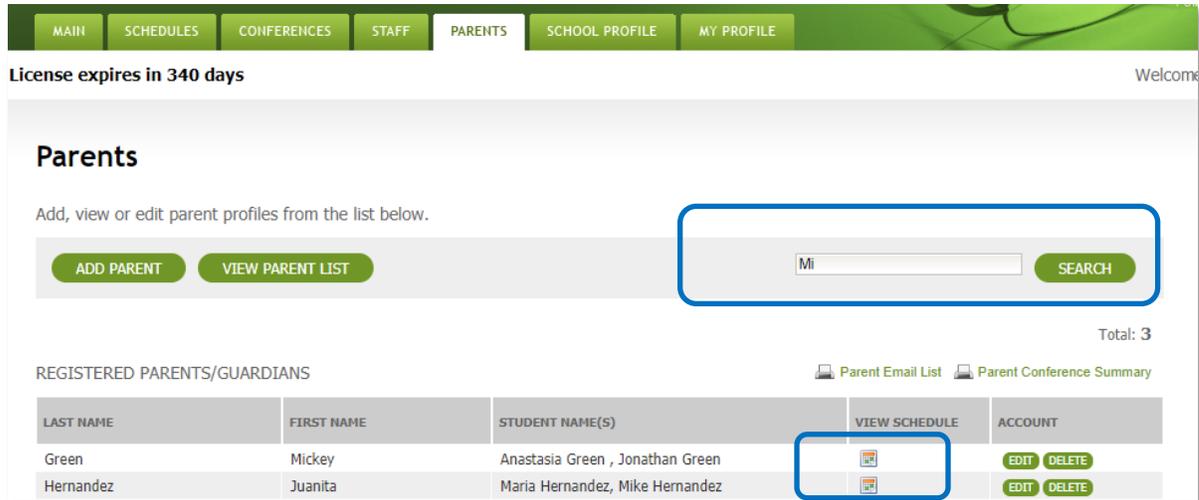
STUDENT INFORMATION

3. Enter, at minimum, the parent’s first and last names, and the first and last name of each child. A phone number can be included. With this limited information, the parent will be unable to log into the Conference Manager or book their own appointments and will need to rely on the school. If the *Email Address* and *Username* (we recommend using the email address) fields are entered the parent will be able to login to their account to book or check appointments as we as receive the confirmation and reminder emails sent by the system. As mentioned above, this does not apply to PowerSchool-Conference Manager configurations.
4. Click SUBMIT to complete the process of creating the account.

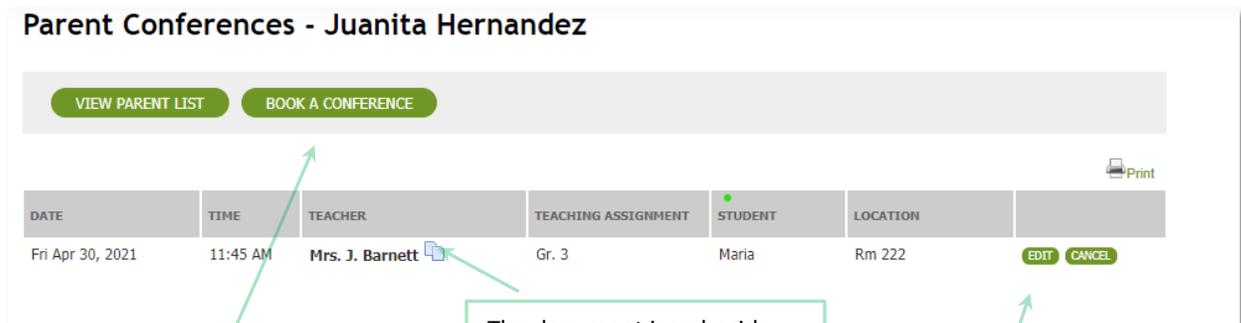
Viewing, Editing, Printing a Parent Schedule

1. Click on the MANAGE PARENT icon in the MAIN tab or click the PARENTS tab.
2. Enter a portion or all of the parent or student’s first or last name.
3. Locate the account you wish to edit or delete in the list of parent accounts that match the search term.

- Click the VIEW SCHEDULE icon to view the parent’s current bookings.



- From this page the system admin or office admin user can PRINT icon to print the parent schedule, book another conference for the parent or edit an existing conference.



This screen also provides a convenient way to book another conference for the parent.

The document icon beside the teacher’s name indicates the teacher has added a staff member(s) to this conference booking. Hovering over the icon will display the added staff member(s)

The booking can be edited or cancelled.

Deleting a Parent Account

- Click on the PARENTS tab and enter a portion or all of the parent or student’s first or last name.
- Locate the account to delete in the list of parent accounts that match the search term.
- Click the DELETE button to remove the parent account. **It is not necessary for schools to delete parent accounts at the end of the year.** The notification email sent at the beginning of a *conference* provide parents with a note if they wish to unsubscribe or delete their account. In

addition to this, parent accounts that have been inactive for 12 months are deleted automatically.

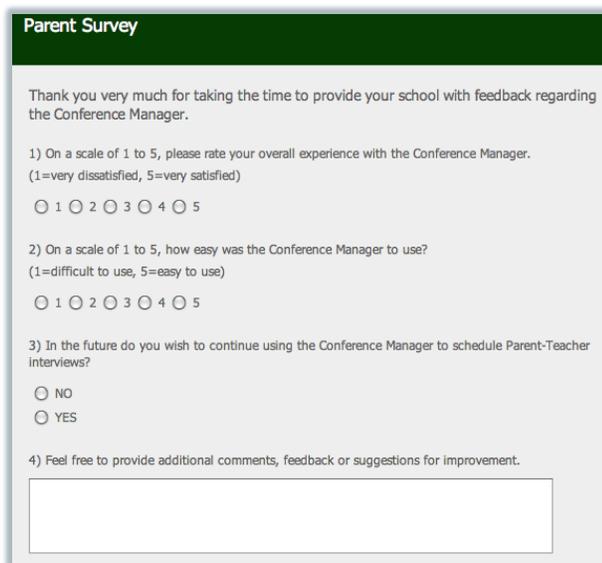
Conference Manager Reports

The Conference Manager provides the system admin user with a number of reports. These include:

- Parent Exit Survey (parent perception data after 1st conference booking)
- Parent Email List
- Parent Conference Summary
- Print All Staff Schedules (with or without comments)

Parent Exit Survey

When a parent logs out of the Conference Manager after booking one or more conferences, he or she is presented with the option of completing an exit survey to share their impressions of the booking process using the Conference Manager.



The screenshot shows a 'Parent Survey' form with a dark green header. The main content area is white with a light gray border. It contains the following text and questions:

Thank you very much for taking the time to provide your school with feedback regarding the Conference Manager.

1) On a scale of 1 to 5, please rate your overall experience with the Conference Manager.
(1=very dissatisfied, 5=very satisfied)
 1 2 3 4 5

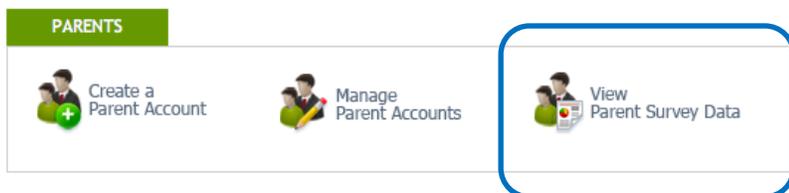
2) On a scale of 1 to 5, how easy was the Conference Manager to use?
(1=difficult to use, 5=easy to use)
 1 2 3 4 5

3) In the future do you wish to continue using the Conference Manager to schedule Parent-Teacher interviews?
 NO
 YES

4) Feel free to provide additional comments, feedback or suggestions for improvement.

To display the Conference Manager Exit Survey data follow these steps:

1. Click the VIEW PARENT SURVEY DATA from the MAIN tab.



2. Responses to the survey are provided in a report and can be printed using the PRINT icon located in the upper right of the page.

1) On a scale of 1 to 5, please rate your overall experience with the Conference Manager.
(1=very dissatisfied, 5=very satisfied)

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	6	31.58%
5	12	63.16%

Average Rating: 4.58

2) On a scale of 1 to 5, how easy was the Conference Manager to use?
(1=difficult to use, 5=easy to use)

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	2	10.53%
5	16	84.21%

Average Rating: 4.79

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	2	10.53%
5	16	84.21%

Average Rating: 4.79

3) In the future do you wish to continue using the Conference Manager to schedule Parent-Teacher interviews?

Rating	Count	Percentage
NO	0	0.00%
YES	19	100.00%

4) Feel free to provide additional comments, feedback or suggestions for improvement.

Number of parent comments: 4

This web interface uses some routines that are not supported by some browsers. This provided a very frustrating experience until we moved to a newer computer with a different browser. Since there is likely to be a wide variety of computers used by parents, it would make sense to use the least "sophisticated" HTML programming possible to ensure easy access by everyone.

This is a very easy way to make schedule for the conference. I appreciate the people working on the website for providing this webpage for the parents!

Great program, Brant! We use it every time. Makes life much easier!

This method of booking a conference time was efficient, easy and could be done at my convenience. Thank-you!

Parent Email List and Parent Conference Summary report

The parent email list and Parent Conference Summary report can be accessed on the PARENTS tab. The icon for each report is just above and to the right of the parent list as shown below.

Parents

Add, view or edit parent profiles from the list below.

[ADD PARENT](#) [SEARCH](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Total: 38

REGISTERED PARENTS/GUARDIANS [Parent Email List](#) [Parent Conference Summary](#)

Print All Staff Schedules

Staff schedules can be bulk printed with or without comments. Click on the SCHEDULES tab and click the desired report format as shown below.

Choose a Teacher

To view a list of available teachers, please select a session below:

[VIEW MY SCHEDULE](#)

[VIEW TEACHER LIST](#) [Print ALL Staff](#) [Print ALL Staff \(No Comments\)](#)

Part 6 – Reports and Data Extracts

Post Conference Summary Report

Shortly after conferences have concluded, the Conference Manager will automatically send the Conference Manager System Admin user(s) an email that includes two attachments; a Conference Summary Report (PDF Format) as well as a data file containing the raw appointment data (csv format) that can be opened by Excel for further analysis and reporting. This same data can be accessed any time during conferences from the right side of the MAIN tab page. It is important to note that the data can be accessed this way for only 2 weeks after conferences conclude, at which time it is deleted. We recommend that system administrators who are interested in doing a data analysis retain the email that is sent so that this information is available beyond the 2 weeks following conferences.