

Who is this document intended for?

You are a System Administrator at your school or district who is responsible for setting up Parent-Teacher conferences using the Conference Manager.

Using the Conference Manager to schedule Virtual Conferences

The Conference Manager that supports the scheduling of parent-teacher conferences that involve a web-based video platform, such as Zoom, Google Meet, Skype and Microsoft Teams. To be clear upfront, the Conference Manager does not provide the video-conferencing platform, rather we allow you to schedule and launch video conferences that use the video software the school is already using.

Important to know before you schedule Virtual Conferences

There are many factors that can impact the successful use of video conferencing software between teachers and parents. This is particularly true when teachers are conducting conferences within a school or district firewall and the parent is in a home or business location. **Prior to conducting your virtual conferences, we recommend doing the following:**

- Consult with your school or district IT personnel on how to ensure trouble free web-based video conferencing between teacher and parent
- Check to see if your video conferencing platform has its meeting URLs expire after a defined period of time. Ensure each teacher creates their meeting URL and enters it in their Conference Manager MY PROFILE as early in the process as possible. This task can also be completed by the System Admin depending on your preference.
- In relation to the above, and applicable to those schools and districts that use G Suite for Education, we recommend that the meeting URL in the teacher profile be created by each individual teacher and that nicknames not be given to these meetings. We have found that Google Meet appointments, created through the G Suite calendar appointment work best and should be set for the day of conferences or set up as a recurring appointment on each of the days conferences occur. The time slot does not need to span the full time period conference are occurring on.
- Teachers should test their meeting URL in advance of scheduled conferences. Ideally the test should occur with the teacher in the location they will be conducting conferences and the test involve connecting with someone who is in a remote home or office location.
- For subsequent rounds of Parent-Teacher conferences, it is important to note that meeting URLs will almost certainly need to be re-entered as they generally expire after a period of time. The exception being Video Conferencing systems that permanently assign a meeting room to each teacher. As an example, WebEx does this.

- As a backup plan, or if the parent prefers to be contacted by phone, the parents will be asked to enter a phone number where they can be reached. The teachers will have easy access to this phone number when they view their Teacher Schedule.
- Parents who are using cell phones or tablet devices will be prompted by most video conferencing platforms. This may mean that the start of a conference may be delayed while parents load and configure the applicable app. If this is the first online conference a parent has been involved in, we recommend you accommodate for the time it takes to download and install the applicable app.

The Conference Manager provides the means by which parents receive the link that is created by the meeting platform used by the teacher. Those links are subject to whatever restrictions or limitations exist with the web-based video platform you use. Some school jurisdictions configure their firewall to block certain connections. The ability to change those restrictions reside with the provider of the platform and/or those who manage the technology for the school, but are beyond the control of SchoolSoft.

The steps below are important in configuring the Conference Manager for Virtual Conferences.

1. Turning the Virtual Conferences Feature On

The Conference Manager system admin at the school clicks on the SCHOOL PROFILE tab



and scrolls down to preferences and must check “Enable Virtual Conferencing Support” and click the SUBMIT button.

 A screenshot of a web form titled 'PREFERENCES'. It contains several checkboxes:

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

 Below the checkboxes is a text area labeled 'Message to display to parents where a staff is fully booked in a session' with the text 'If you would like to schedule an appointment, please contact the school.' At the bottom of the form are two buttons: 'CANCEL' and 'SUBMIT'. A blue arrow points to the 'SUBMIT' button. Another blue arrow points to the 'Enable Virtual Conferencing Support' checkbox.

2. Setting-up the Teacher Profile for Virtual Conferences

In order for a teacher to hold a video conference they must set up a specific meeting in the video application (e.g. Google Meet) used by the school. The specific URL for the video meeting used by the teacher now needs to be added to the teacher's profile. It is important to note that for each teacher only one video meeting (and, therefore, one URL) is used for all parent meetings. This specific URL is copied into the teacher's profile. This step can be completed by each teacher or can be done by the SchoolSoft System Admin or Office Admin user on the teachers' behalf. It is assumed that the teacher or office staff are familiar with the video conferencing software used by the school to create a meeting and copy the URL specific to that meeting.

- a. If the school decides that teachers are putting the meeting URL into their profile then the teacher logs into the Conference Manager and clicks the MY PROFILE tab copies and pastes the URL into the VIRTUAL CONFERENCE URL field as shown below. The teacher then clicks submit to save that information to their profile.

MY CONFERENCES **MY PROFILE**

My Profile

Edit the information below, then submit your changes:

STAFF INFORMATION

First Name: Jane
Last Name: Barnett
Mrs.

Username (used for log in): jbarnett@schoolsoft.com
Password: ***** [CHANGE PASSWORD](#)

Email Address: jbarnett@schoolsoft.com

OTHER INFORMATION

Staff/Teaching Assignment: Gr. 3
Conference Location or NA: Room 21
Virtual Conference URL: ←

I have read the [Terms and Conditions](#)

[SUBMIT](#)

If the SchoolSoft System Admin or Office Admin is entering this information on behalf of staff rather than the teachers themselves, the System Admin or Office Admin user logs in and clicks on the STAFF tab and then the EDIT button to the right of the teacher the meeting URL applies to and then the URL is pasted in the profile for that staff member.

Once a URL is added to a teacher's profile you will notice a small VC badge beside their name as shown below. This provides a quick visual means of

confirming which teachers have a URL entered in their staff profile. **If the URL is not entered, the teacher will not be able to initiate a video conference as detailed at the end of this document.** We strongly recommend that the system admin confirms that each teacher involved in conferences has the VC badge showing well in advance of the parent-teacher conferences.

NAME	TEAM	TEACHING ASSIGNMENT	LOCATION
Acorn, Chester VC		Kindergarten	Room 2
Admin, Test		System Admin	NA
Anderson, Kevin VC		Gr. 5	Room 222
Armstrong, Sharon VC		Fine Arts	Drama Room
Barb, Rhianna		Gr. 4	115

3. Configuring Conference Sessions for Virtual Conferences

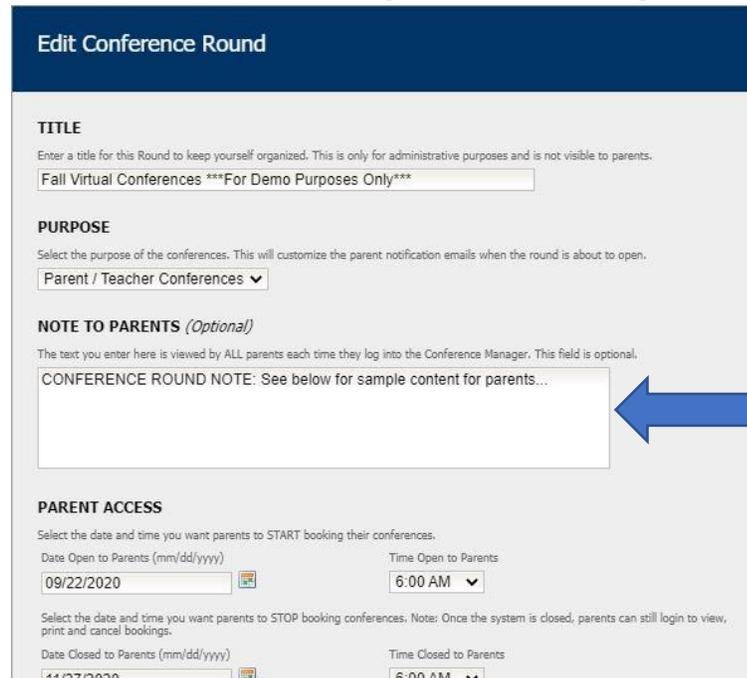
For the most part, setting up a Conference Round that will involve virtual conferences is much like regular conferences. However, there are a few actions taken by the System Admin that are specific to virtual conferences. These specific set-up actions are detailed below.

- a. As usual, the System Admin clicks on the CONFERENCES tab and clicks the CREATE ROUND button.

CREATE NEW CONFERENCE ROUND

- b. In the initial configuration of the Conference Round we recommend that you include information about the virtual conferences for parents in the NOTE TO PARENTS field. We recommend you do this even if you have already sent out a separate communication to parents indicating the upcoming round of

conference will be done using video conferencing software.



ROUND NOTE:

Sample text for schools using the option of **Automatically send parents the meeting link in the confirmation email.**

In an effort to curb the spread of COVID-19, our parent conferences this year will be held virtually using Google Meet. The booking process remains the same, but joining a virtual conference is different. Once you make your booking, you will receive a meeting link in your Confirmation Email. You will also receive the meeting link in your Reminder email the day before your conferences are scheduled. Please click the meeting link at your scheduled time. Thank you for your patience and cooperation.

Sample text for schools using the option of **The teacher must click START NOW to send parents the meeting link.**

In an effort to curb the spread of COVID-19, our parent conferences this year will be held virtually using Google Meet. The booking process remains the same, but joining a virtual conference is different. After making your booking, you will receive a confirmation email. At your scheduled meeting time, the teacher will click a button that starts the conference and the Conference Manager will send an email containing a meeting link. Thank you for your patience and cooperation.

- c. After defining the Conference Round, you will be prompted to create one or more Conference Sessions. The first conference session action will be to give consideration to using the TRAVEL TIME setting to provide some transition time between conference for the teacher.

Edit Conference Session

Fall Virtual Conferences ***For Demo Purposes Only***

SESSION INFO

A Conference Round is made up of one or more Conference Sessions.
 Select a date and include any additional information needed to supplement the date. This information is displayed to parents in a drop down menu.

Date (mm/dd/yyyy) -

Start Time Finish Time Interview Duration (Mins) Travel Time (Mins) Number of Students per Conference

VIRTUAL CONFERENCING

Unlike face-to-face conferences, when a video-based conferences does not start on time, there is no easy way for a parent to know if the teacher is delayed by another parent or if they have forgotten the conference. Although this setting is optional, we recommend setting the Travel time to 2 or more minutes to help ensure all parent conferences start on time. In the screen shot above, the school has planned 4 conferences per hour, with each being 13 minutes in duration and 2 minutes of transition time between conferences.

- d. The “Allow teacher to use Virtual Conferencing” checkbox must be checked for each Conference Session that will involve virtual conferences.

SESSION INFO

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 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) -

Start Time Finish Time Interview Duration (Mins) Travel Time (Mins) Number of Students per Conference

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

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

You have two choices for how and when the parents receive the link to their virtual conferences:

- i. **Automatically send parents the meeting link in confirmation emails.**
 Most schools selecting this option are using video conferencing software that has “Waiting Room” functionality, where a teacher admits the waiting parent into the conference. The parents will receive the meeting link in confirmation emails and reminder emails that are sent automatically by the Conference Manager prior to Parent-Teacher conferences.
- ii. **The teacher must click START NOW to send parents the meeting link.**
 Most schools selecting this option want the teacher to control when the parents have access to the meeting link. The parents will not receive the meeting link until the teacher clicks the START NOW button when the

appointment is scheduled to start. In this instance, the parent will NOT receive the meeting link in advance.

- e. We recommend using the SESSION NOTICE FOR PARENTS to provide important information related to the virtual conferences, as illustrated below. Remember each session can contain its own Session Note to Parents, so you may be duplicating this information for each session.

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.

PARENT NOTE: See below for sample content for parents...

ADD STAFF MEMBERS

PARENT NOTE:

Sample text for schools using the option of **Automatically send parents the meeting link in the confirmation email.**

You will receive the meeting link prior to your scheduled conferences. A meeting link will be sent in Confirmation emails and Reminder emails that are sent automatically by the Conference Manager prior to Parent-Teacher conferences. As a backup, or if the teacher is contacting you by phone, you will be asked to enter a phone number where you can be reached at your scheduled meeting time.

Sample text for schools using the option of **The teacher must click START NOW to send parents the meeting link.**

You will receive an email containing a link that will be used to initiate the parent conference at (or close to) the time of your conference. As a backup, or if the teacher is contacting you by phone, you will be asked to enter a phone number where you can be reached at your scheduled meeting time.

- f. **Team Teachers – Please note that team teachers will need to share a common meeting link.** If you have teachers grouped in teams in the Conference Manager, it is important that one of the teachers in the team takes responsibility for creating a link for the team and pasting it in his/her profile in the Conference Manager. This link should be shared with the other teachers for them to place in their profiles. The lead teacher is responsible for initiating the meeting with parents when the START NOW button is used. The other teachers in the team can join the meeting by clicking the same Meeting link.

How a Teacher Initiates a Virtual Parent-Teacher Conference

On the day that conferences occur and in advance of the conferences commencing, we recommend that teachers login confirm the meeting software is functioning properly by entering into the meeting using the URL specified in their MY PROFILE. This can be easily done by having the teacher log into the Conference Manager, select the session that corresponds to the conferences about to occur and then click the virtual conference Link.

MY CONFERENCES MY PROFILE

Welcome: **Chester Acorn**

My Conferences

To view a list of current conference bookings, please select a session from the dropdown below.
To cancel a booking, or for additional information, please contact **Heather Fox** for further information.

VIEW A SESSION

Available conference sessions **Friday November 27 - Virtual Conferences - All Grades**

[Print](#) [Print \(No Comments\)](#)

Friday November 27 - Virtual Conferences - All Grades

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

Virtual Conference Link: <https://meet.google.com/eer-yvbu-qqe>

When you click the "Start Now" button, the parent will receive an email from the Conference Manager with a link to your virtual meeting room. You are responsible for ensuring that meetings start and end on time.

AVAILABLE	TIME	STUDENT NAME	PARENT/GUARDIAN NAME	COMMENT	MEETING	PHONE	
<input checked="" type="checkbox"/>	9:00 AM						
	9:15 AM	Billy Johnson	George Johnson		START NOW	403-660-9999	EDIT CANCEL APPT.
	9:30 AM	Ivy McNicol	Cam McNicol		START NOW	587-123-4567	EDIT CANCEL APPT.
<input checked="" type="checkbox"/>	9:45 AM						BOOK
	10:00 AM	Kira McNicol	Cam McNicol		START NOW	(403) 669-7200	EDIT CANCEL APPT.
<input checked="" type="checkbox"/>	10:15 AM						BOOK

To initiate the first conference, the teacher clicks on the MY CONFERENCES tab, then selects the applicable Conference Session. The schedule of conferences booked will be displayed.

To start a conference, the teacher clicks the START NOW button beside the conference that is scheduled to commence at that time. This will cause the CONFERENCE MANAGER to send an email to the parent informing them their conference is ready to start and includes a link to the meeting. Below is a sample of the content contained in the email to parents.

From: appointments@schoolsoft.com

Sent: June 10, 2020 8:19 PM

To: theparent@schoolsoft.com

Subject: Your Parent-Teacher Conference is starting NOW

School: Memorial School

Teacher(s): Mr. Acorn

Date and Time: Wednesday June 17, 2020 at 9:00 AM - 9:13 AM

Student: Kim James

Your Parent-Teacher conference is ready to begin. Please click the following URL to join the conference.

<https://meet.google.com/qan-pqzh>

As a backup if there is an issue with the Video Conferencing software, or if the parent prefers to be contacted by phone, the teacher can call the parent using the phone number provided during the booking process.

After a parent meeting concludes, the teacher should click the button that ends or hangs up the meeting and then initiate the next conference at the designated time by clicking the START NOW button for that specific meeting.

This process is repeated for each parent-conference listed in the schedule.

How a Parent Joins A Conference

As mentioned above, parents receive an email with a link in it that must be clicked on to join the virtual conference. Depending on your chosen approach, parents will either receive the meeting link well in advance of the conferences through confirmation and reminder emails OR they will receive an email with a meeting link when the teacher clicks START NOW. As a backup, or if the parent prefers to be contacted by phone, the teacher can call the parent using the phone number provided during the booking process.