

## Parent Teacher Conference Set Up

### Basic Information

- To add a Parent/Teacher conference to your SOCS site, you must be a Parent Teacher Conferences Manager in Central Services. Access is given via the Users option in Central Services
- Teachers first must have access to Central Services and the “Teacher” option in Parent Teacher Conferences must be marked for each teacher involved in a conference

### To Set Up a Conference

Select **Parent Teacher Conferences** from the menu options on the left-hand side of the Central Services page, select “Add New Conference” and fill in the necessary fields:

- Conference Title** – name of conference being added
- Description** – description of the conference not-seen by the public; internal use only
- Signup Date Range** – date range the public will be able to sign up for the conference
- Conference Date** – date the conference will be held

**Note: Once a conference date has been established, it cannot be changed. If the date is incorrect, you have to delete the conference and re-enter the information for the correct date.**

- Additional Days** – use the “Selected Days” field to add additional conference days. Click on the calendar icon to bring up a grid calendar. Click on the additional day(s) you want for the conference. After selecting the date(s) close the calendar icon by clicking on “close”.

**Note: The “additional day(s)” will have the same start and end time as the main conference date. If the additional day(s) will have a different start and end time, set up a new conference for those day(s).**

- Time** – the daily start and end time for the conference
- Time Increment** – choose from the drop-down list the number of conference minutes per session/per attendee

The screenshot shows a web form for setting up a conference. It has the following sections and fields:

- Basic Information:**
  - \*Conference Title: Parent Teacher Conference
  - Description: (empty text area)
- Signup Date Range:**
  - \*Month: April, To: April
  - \*Day: 2, 8
  - \*Year: 2008, 2008
- Conference Date:**
  - \*Month: April
  - \*Day: 10
  - \*Year: 2008
- Additional Days:**
  - Selected Days: 2008-03-11 (with a calendar icon)
- \*Time:**
  - Start Time: 4 : 00 AM PM
  - End Time: 7 : 00 AM PM
  - Time Increment: 15 Minutes

## Display Options

Use the **Display Options** fields to select how the conference information is displayed to the public. Click the option you wish the public to see:

- Option 1** All names will be visible to the public.
- Option 2** Names will show in time slots reserved by Teachers and Administrators. Time slots reserved by the public will show as reserved – no names will appear.
- Option 3** Time slots reserved by the current user (public) will display a check mark; time slots reserved by any one else show as reserved.

The screenshot shows a dialog box titled "Display Options". It has three radio button options:

- All names will be visible.
- Names in time slots reserved by Teachers and Administrators will be visible, names in time slots reserved by other public users will be blank.
- Time slots reserved by the current user will display, slots reserved by Teachers, Administrators and other public users will be blank.

Below the options is a "Show" label followed by a dropdown menu currently set to "Parent Names" and the text "on the confirmation registration report."

The dialog is divided into sections:

- Event Locale:** A text input field labeled "Location:".
- Contact Information:** Three text input fields labeled "Name:", "Email:", and "Phone:".

At the bottom are "Cancel" and "Continue" buttons.

**Confirmation Registration Reports:** Choose to display either the parent or student name.

**Location:** Location of the conference

**Fill in the Contact Information:**

- Name of the person to contact regarding the conference
- Email address for conference contact person
- Phone number for conference contact person

Click on “Continue” to select teachers involved in the conference. Remember – in order for teachers to be available for conferences, they must have teacher access to Parent Teacher Conferences (a Users Manager must set this up).

## Setting Up Teachers

There are two options for selecting teachers:

- **Teacher search option** – enter all or part of a teachers name to see a list of teachers with the criteria you entered as part of their name. Click “Add” next to the appropriate teacher(s) to add them to the conference.

**Teachers**

Search by Teacher Name

Search:

### View/Select Results

Your search found 3 matches. 1 – 3 are shown below.

Add	Name	Email
<input type="checkbox"/>	smith, john	johnsmith@hotmail.com
<input type="checkbox"/>	smith, robert	robertsmith@usd2.org
<input type="checkbox"/>	smith, sally	sallysmith@usd4.org

- **The View/Select Results option** shows a list of all teachers that have “View” access for Parent Teacher conferences. Select the teacher(s) for the conference by marking the box next to the teacher name in the drop-down list of teachers.

### View/Select Results

Your search found 12 matches. 1 – 10 are shown below.

Add	Name	Email
<input type="checkbox"/>	Anderson, Mike	mikea@fes.org
<input type="checkbox"/>	Clary, Robert	robertc@fes.org
<input type="checkbox"/>	Copes, Larry	lcopes1@a5.com
<input type="checkbox"/>	Dunn, Tricia	triciad@fes.org
<input type="checkbox"/>	Hubbard, Blaine	blaineh@fes.org
<input type="checkbox"/>	Mullins, Karen	karenm@fes.org
<input type="checkbox"/>	Relations, Client	training@fes.org
<input type="checkbox"/>	Support, SOCS	socssupport@fes.org
<input type="checkbox"/>	Waldo, Peter	peterw@fes.org
<input type="checkbox"/>	smith, john	johnsmith@hotmail.com

Upon completion of the teacher selection, click on “Add” to add the conference. You will return to the Conference List screen that shows all conferences scheduled.

## To Schedule Appointments for a Teacher

- Click on “Edit” for the appropriate conference
- Click on “Teachers” at the bottom of the page
- Click on “Schedules” at the bottom or top of the teacher list
- Click on “Edit” next to the appropriate teacher’s name
- Click on “Edit” for the desired appointment timeslot and fill in the parent name, email address and student name. Click on “Update” to lock in the appointment

Schedules

October 10, 2008						
Edit	Delete	Time	Reserved	Parent	Student	
		4:00 PM				
		4:15 PM				
		4:30 PM				
		4:45 PM				
		5:00 PM				
Parent: <input type="text"/> Email: <input type="text"/> Student: <input type="text"/> <div style="text-align: right;"> <input type="button" value="Update"/> <input type="button" value="Cancel"/> </div>						
		5:30 PM				
		5:45 PM				
		6:00 PM				
		6:15 PM				
		6:30 PM				
		6:45 PM				

Schedules

## To Create a New Appointment

- You can schedule appointments for the teacher outside of the conference date range by filling in the “Create a New Appointment” field at the bottom of the screen.

		6:30 PM			
		6:45 PM			
<b>Create a New Appointment</b>					
Date: <input type="text" value="October"/> / <input type="text" value="10"/> / <input type="text" value="2008"/>					
Time: <input type="text" value="4"/> : <input type="text" value="00"/> : <input type="radio"/> AM <input checked="" type="radio"/> PM					
Duration: <input type="text" value="15"/>					
Parent: <input type="text"/>					
Email: <input type="text"/>					
Student: <input type="text"/>					
<input type="button" value="Add"/>					
<b>Set the class note</b>					
Class Note: <input type="text"/>					
<input type="button" value="Set"/>					

Schedules

## To Set Class Note

- Information entered in this field is specific to the teacher and will display to the public when they schedule appointments. This field can be used to list subject(s) taught by the teacher, the room number for the teacher or other information relative to the specific teacher

<b>Set the class note</b>	
Class Note:	<input type="text"/>
<input type="button" value="Set"/>	

Schedules

- Click on “Schedules” at the bottom of the page to return to the teacher list

## Generate a report

Click on the “Report” option for the appropriate conference. The report will show the individual teachers, time slots and the people signed up for each time slot. To print the report, click on “File” on the browser tool bar and select “Print”.

## Send an Email

You can send email reminders to the conference participants by clicking on the “Email” option next to the appropriate conference. Put your reminder message in the “body” of the email. Reminder emails will go to all registrants. Individual appointments for each recipient will show at the bottom of each individual email.

Send Email Reminders  
(\* = required)

Email Form

Please enter the text for the email in the body below. The appointments will be added in a list below the body.

\*Subject: Elementary Fall Conference Schedule

\*Body:

## For Teachers with View Access

A teacher with View Access to Parent Teacher Conferences can set up his/her own individual conference appointments.

- Select “Teachers” from the menu options on the left-hand side of the Central Services page
- Chose the appropriate conference
- Click on “Edit” next to the appropriate time slot for the conference
- Fill in the parent name, email address and student name for the time slot selected
- Click on “Update” to schedule the appointment

# PTC Registration Process for Parents/Guardians

## Where to Start

- **Click on the “Parent Teacher Conference” tab on the navigation. This will take you to the registration/sign in screen**
- **Sign In:** If you previously signed up for SOCS calendar reminders, you are already a registered user for Parent Teacher Conference (PTC) and will use your email and the same password used for calendar reminders
- **Sign Up NOW!** If you have not yet registered, you will complete the registration screen that asks for name, email and password. Once you've completed the registration screen you will have password protected login access and will receive an email confirming your registration and login credentials. You will also have access to create calendar reminders

## YOU ARE NOW AT THE PTC SCREEN

### Signing Up for Parent-Teacher Conferences

**Step 1:** Choose the conference you wish to attend. Once you've chosen the conference you will be taken to a list of teachers associated with the conference.

**Step 2:** Select the teacher(s) from the list or start typing the last name in the "Search Teacher" field.

**Note:** You can reserve time with up to eight teachers. You can register for additional teachers once you complete the current process.

**Step 3:** Enter the student's name.

**Step 4:** Click continue.

**Step 5:** Check the box next to the conference times(s) you wish to reserve.

**Step 6:** Click Update.

**The timeframe/s you chose will be colored green.**

**At this point you may sign up for conferences for additional teachers or additional students by clicking on the “Teacher Selection” button.**

- Choose additional teachers **OR**
- Repeat the process you just completed for additional student/s choosing new teacher/s and entering the additional student/s name/s
- Click Update
- The timeframe you chose is colored **green** (registration for the additional teachers or student/s is added to your Confirmation Registration Report)

At the bottom of the screen you will see the confirmation of your conference registration. You will have the option to "**click here to print**" to get a copy of your Conference Registration Report.

If you have any questions about the process or have difficulty registering, either email \_\_\_\_\_ or call \_\_\_\_\_ for assistance.