



W S I P C

*Inspired by education.  
Empowered by technology.™*

# WSIPC Guide to Conference Scheduler for Teachers

# Contents

<b>Contents</b>	<b>i</b>
<b>About This Guide</b>	<b>1</b>
<b>What You Should Know Before You Start</b>	<b>1</b>
Be Sure You're Signed In	1
<b>How to Use This Guide</b>	<b>2</b>
Navigation Paths	2
Getting Around	2
Screen Shots	2
<b>What's in a WSIPC Guide</b>	<b>2</b>
Do Not Post This Guide to the Public Internet	3
What's New in This Edition	3
<b>Accessing the Conference Scheduler</b>	<b>5</b>
<b>Using Conference Scheduler Views</b>	<b>5</b>
Class Listing View	5
Calendar View	8
<b>Adding Time Slots</b>	<b>12</b>
<b>Adding a Single Time Slot for an Individual Class</b>	<b>12</b>
<b>Adding Multiple Time Slots for an Individual Class or for Specific Classes</b>	<b>15</b>
<b>Adding a Single Time Slot for Any Class</b>	<b>17</b>
<b>Adding Multiple Time Slots for Any Class</b>	<b>20</b>
<b>Scheduling Time Slots</b>	<b>23</b>
<b>Adding 'Do Not Schedule' Times</b>	<b>23</b>
<b>Assigning Guardians to Time Slots</b>	<b>24</b>
Assigning Guardians to a Time Slot from the Class Listing View	25
Assigning Guardians to a Time Slot from the Roster	26
Assigning Guardians to a Time Slot from the Calendar View	27
<b>Rescheduling a Time Slot</b>	<b>28</b>
<b>Configuring and Sending Conference Email Notifications</b>	<b>31</b>
<b>Sending Conference Sign Up Reminder Emails</b>	<b>31</b>
<b>Turning Off Teacher Email Notifications</b>	<b>33</b>

<b>Managing Time Slots</b>	<b>34</b>
Editing a Time Slot	34
Deleting Time Slots	35
Deleting a Time Slot from the Class Listing View	36
Deleting a Time Slot from the Calendar View	36
Deleting Multiple Time Slots	36
<b>Managing Time Slot Notes</b>	<b>41</b>
Adding a Note to a Time Slot	41
Viewing and Editing a Note	43
Deleting a Note	44
<b>Closing or Cancelling a Conference</b>	<b>46</b>
Updating the Status of a Time Slot	46
Tracking Guardian Attendance	48
<b>Reports</b>	<b>50</b>
Students Not Signed Up Report	50
Teacher Conferences Report	51
<b>Working with Team Conferences</b>	<b>52</b>
<b>Appendix A – Troubleshooting</b>	<b>54</b>
Teacher Conferences do not appear in Family Access	54
Guardians can view but not sign up for time slots in Family Access	54
I can't assign a guardian to a time slot	54
I am not receiving Confirmation Emails	55

# About This Guide

As a teacher, you may be called upon to create a schedule for conferences and to assist in scheduling guardians into available teacher conference time slots. You can use the Conference Scheduler contained in Educator Access Plus to perform these tasks.

Tasks you can perform may include, but are not limited to, the following:

- Creating conference time slots so that your students' guardians can select from available conference times in Family Access
- Signing guardians up for an available conference time slot or changing the time or date of their previously scheduled conference time slot
- Generating a report that shows your schedule of conferences

Each of these tasks is explained in this Guide.

---

**Note** Team Conferences allow your Entity to set up conferences for Scheduling Teams. If you are part of a Scheduling Team you can't add individual time slots for the Team Conference, but you can add and remove guardian attendees.

To learn more about Team Conferences, see "[Working with Team Conferences](#)" (page 52).

---

## What You Should Know Before You Start

This Guide discusses features of the Conference Scheduler relevant to teachers. Your Security level may prevent you from accessing all features described in this Guide. If you don't have access to a feature you need, contact the person in your district responsible for setting up Security.

## Be Sure You're Signed In

This Guide is intended to be read while you are working in Conference Scheduler, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.


# How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

## Navigation Paths

All paths listed in the Guide begin with Educator Access Plus\Teacher Access, unless otherwise specified.

## Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the **Bookmark** button  in the menu bar on the left side of the screen.

## Screen Shots

You'll find screen shots throughout the guide to help you learn how to use the software. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

## What's in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

## Do Not Post This Guide to the Public Internet

The information contained in this Guide is copyright protected. You may store a digital copy of this Guide on your internal server for access by authorized users. Allowing access to this Guide by anonymous users, including search engine crawlers, is not permitted. If you are unsure whether your website is open or your server is protected from crawlers, contact your systems administrator.

## What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
This Guide has been updated to reflect WSIPC's November 2016 software release version 05.16.10.00.05.	N/A
Updated the structure of the Guide.	N/A
Updated the "Adding Multiple Time Slots for an Individual Class or for Specific Classes" section as the Mass Add Time Slots screen has changed.	<a href="#">15</a>
Updated the "Adding a Single Time Slot for Any Class" section to document the new Entity option.	<a href="#">17</a>
Updated the "Adding Multiple Time Slots for Any Class" section to document the new Entity option.	<a href="#">20</a>
Added the "Sending Conference Sign Up Reminder Emails" section to document the new email reminder capability that has been added to the Students Not Signed Up for Conferences Report.	<a href="#">31</a>
Updated the "Deleting Multiple Time Slots" section to document the new Entity option.	<a href="#">36</a>
Added the "Tracking Guardian Attendance" section.	<a href="#">48</a>
Added the "Students Not Signed Up Report" section to document the new email capability.	<a href="#">50</a>

Description of Change	Page #
Updated the "Teacher Conference Report" section to document the new Entity option.	<a href="#">51</a>
Added the "Working with Team Conferences" section to document the new Team Conferences feature.	<a href="#">52</a>
Added the "Appendix A – Troubleshooting" section.	<a href="#">54</a>

# Accessing the Conference Scheduler

You can use the Conference Scheduler to schedule conferences with students and their guardians. Office personnel, such as secretaries, can also assist in scheduling conferences for you. This Guide covers conference scheduling as it is performed in Educator Access Plus. To learn more about the functionality in Conference Scheduler that is available to office personnel, see the *WSIPC Guide to Conference Scheduler for Office Personnel*.

To access the Conference Scheduler:

- Go to Educator Access Plus\Teacher Access\My Conference Scheduler.

## Using Conference Scheduler Views

When you access the Conference Scheduler, you can view your conference schedule information in two ways:

- By Class Listing
- By Calendar

---

**Tip** When you work with the Conference Scheduler in the Class Listing view, you can access a student roster for each of your classes. The roster is not available from the Calendar view.

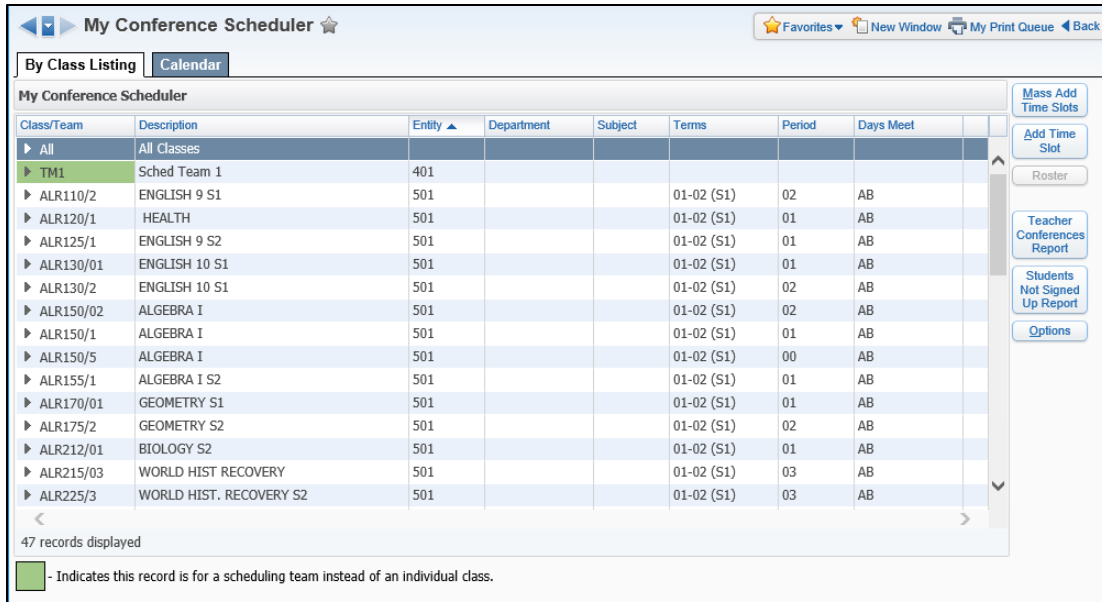
---

You can choose either the Class Listing view or the Calendar view to work in the Conference Scheduler. Each of these views is explained in the following sections. The procedures in this Guide are written to allow you to use either view.

### Class Listing View

When you access the Conference Scheduler, you are taken to the default view, which is the Class Listing view (Figure 1). The Class Listing view displays all of your classes for the current term. You can schedule teacher conferences for these classes.





**Figure 1 - When you access the Conference Scheduler, the Class Listing view is the default view**

**Note** If Team Conferences are enabled for your Entity, Scheduling Team Records for teams you are assigned to are colored green and appear at the top of the list under the record for All Classes (Figure 1). To learn more about Team Conferences, see [“Working with Team Conferences”](#) (page 52).

You can perform many tasks from the Class Listing view. These tasks include:

- Adding and managing time slots for individual classes
- Adding ‘Do Not Schedule’ Times
- Adding multiple time slots at once for an individual class, or for all classes
- Deleting multiple time slots at once
- Signing guardians up for conference time slots
- Rescheduling conferences
- Viewing a student roster that shows all students in a class and shows which students’ guardians have signed up for a conference time slot
- Running the Teacher Conferences Report
- Running the Students Not Signed Up Report
- Turning off email notifications

Each of these tasks is discussed in this Guide.

## Roster View

When you work with the Conference Scheduler in the Class Listing view, you can access a roster for each of your classes. The roster shows a list of all students in the class, their guardians, if student’s guardian has signed up for a conference time slot, and the conference time slot they have signed up for. The roster is not available from the Calendar view.

To view conference information from the roster:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\By Class Listing.
2. Select the class you want to view a roster for.
3. Click Roster to view the roster for the selected class (Figure 2).

---

**Tip** In the Filter box, you can select \*All Terms or \*Current Term Only to view students for this class for all terms or the current term.

---

4. When you finish viewing the roster, click Close.

	Last Name ▲	First	Middle	Guardian Signed Up?	Date	Start Time	End Time	Attended?	Guardian(s)
1	Allebachscr	Rusty	H	Yes	10/21/2016	1:15 pm	1:30 pm	No	Mariah Bielloscr, Lake
2	Allensworthscr	Kayleigh	S	No					
3	Alveloscr	Louis	T	No					
4	Areasscr	Ernie	J	No					
5	Brittanscr	Maurice	H	No					
6	Ciancioscr	Alica	W	No					
7	Coioscr	Dave	P	No					
8	Crowdenscr	Bryanna	A	No					
9	Fremanscr, JR	Normand	B	No					
10	Gathingsscr	Jose	W	No					
11	Graperscr	Sam	V	No					

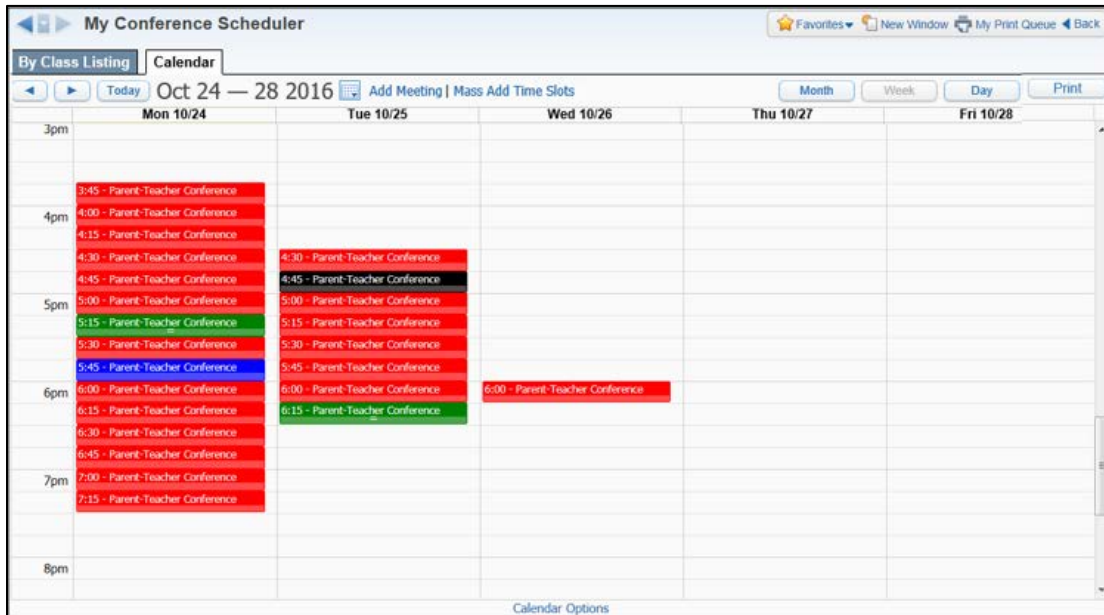
Views: Student Roster Filters: \*All Terms Edit Close

First Previous Next Last 20 records displayed

**Figure 2 - Roster view**

## Calendar View

If you prefer a visual representation of your conference schedule, you can manage conference time slots from the Calendar view (Figure 3). The Calendar view allows you to review your entire conference schedule quickly.



**Figure 3 - The Calendar view provides you with a visual representation of your conference schedule.**

You can perform many tasks from the Calendar view. These tasks include:


- Navigating within the Calendar
- Configuring Calendar options
- Printing the Calendar
- Adding and managing time slots for individual classes
- Adding multiple time slots at once for an individual class, or for all classes
- Signing guardians up for conference time slots
- Rescheduling conferences

Each of these tasks is discussed in this Guide.

## Navigating within the Calendar

When you access the Calendar view, the current week appears by default. You can navigate within the Calendar to look at different time periods.

To navigate within the Calendar, do one of the following:

- Click the forward or back arrows  to navigate through the Calendar.
- Click Today to return to the current date.

## Changing the Date Range on the Calendar

You can also change the date range that appears on the Calendar. The default view is weekly, but you can set the view to monthly, weekly, or daily.

To change the date range that appears on the Calendar:

- Click Month, Week, or Day in the upper right corner of the calendar.

## Printing the Calendar

You can print a copy of your Calendar when conferences are scheduled. When you print the Calendar, the date and time range included on your printed Calendar match what you have configured on the screen. For example, if you want to print a weekly view of your conference schedule, be sure you have configured the Calendar Options to display a full week. To learn how to configure Calendar Options, see "[Configuring Calendar Options](#)" (page 10).

To print the Calendar:

- Click Print in the upper right corner of the calendar.

## Configuring Calendar Options

You can configure several items that control how your conference schedule appears on the Calendar. Items that you can configure include the time range and the colors used to display teacher conferences.

To configure Calendar Options:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\Calendar.
2. Click Calendar Options at the bottom of the screen.
3. Configure the Options screen (Figure 4). Table 1 describes the options on this screen.
4. Click Save.

**Options** My Print Queue Help Menu

**Calendar Options**

Hide Sunday and Saturday on the calendar

Start time: 12:00 AM

End time: 11:00 PM

Time Interval: 15 minutes

**Conference Colors**

Open: 008000

Closed: FF0000

Cancelled: 808080

Rescheduled: 0000FF

Completed: 000222

Unavailable: FFE100

Save

Back

**Figure 4 - You can use Calendar Options to control how conference time slots appear on the Calendar.**

AREA	PURPOSE OF AREA
Calendar Options	Configuration of the days and times that appear on the Calendar.
Options in This Area	Description of Options
Hide Sunday and Saturday on the calendar	Hides Saturday and Sunday on the Calendar. If you do not schedule teacher conferences on the weekend, select this option.
Start time End time	Range of time that appears on the Calendar. For example, if you set Start time to 1:00 PM and End time to 7:00 PM, only this time range is shown on the Calendar.
Time Interval	Allows you to select the length of each time interval block on the Calendar. You may find it useful to set this to match the length of your conference time slots.
AREA	PURPOSE OF AREA
Conference Colors	Allows you to assign colors to each type of conference time slot by clicking to select the desired color.
Options in This Area	Description of Options
Open	Time slot where no guardian has signed up.
Closed	Time slot where a guardian has signed up.
Cancelled	Time slot that has the Status set to Cancelled. To learn more about the Status field, see " <a href="#">Updating the Status of a Time Slot</a> " (page 46).
Rescheduled	Time slot that has been rescheduled by a teacher or office personnel. To learn how to reschedule a conference, see " <a href="#">Rescheduling a Time Slot</a> " (page 28).
Completed	Time slot where the Status is set to Completed. To learn more about the Status field, see " <a href="#">Updating the Status of a Time Slot</a> " (page 46).
Unavailable	Time slot scheduled as a 'Do Not Schedule' time.

**Table 1 - The Calendar Options allow you to configure items related to how the Calendar appears**

# Adding Time Slots

One of the main tasks you perform when using Conference Scheduler is creating time slots. A time slot is a block of time during which you hold a conference with a student's guardians.

There are two main types of time slots: those used for an individual class, and those used for any of your classes ("Any Class" time slots). You can add time slots one at a time, or many at once. Each method is described below for both Individual time slots and for Any Class time slots.

You can create time slots from either the Class Listing view or from the Calendar view. Regardless of which method you choose, the functionality is the same. The method you choose depends on your personal preference.

## Adding a Single Time Slot for an Individual Class

When you create a time slot for an individual class, that time slot is available only to guardians of students in the class that you create the time slot for.

Creating a single time slot for an individual class is useful when you want to accommodate guardians of students in a particular class who are not able to attend conferences during the main time period in which conferences are scheduled. You can create one or two time slots for the class, for an alternative date or time, for guardians who can't attend the main conference.

To add a single time slot for an individual class:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To use the Class Listing view to create a single time slot for an individual class:
    - a. Select the class.
    - b. Click Add Time Slot.
  - To use the Calendar view to create a single time slot for an individual class:
    - a. Click the Calendar tab.
    - b. Click Add Meeting.
3. Configure the Teacher Conference Maintenance screen (Figure 5). Table 2 describes the options on this screen.
4. Click Save.



**Teacher Conference Maintenance**

My Print Queue ? Help Menu

**Teacher Conference Maintenance**

\* Title: Parent-Teacher Conference

\* Class: BUS380/02 - ROBOTICS

\* Date: 10/21/2016 Friday

\* Time: 07:00 AM to 04:00 PM

Description:

Building: 401 Building (401)

Room: A301 Room(A301)

**Guardian Attendees**

Update Attendees

Clear Attendees

*There are no records to display; check your filter settings.*

0 records displayed

Asterisk (\*) denotes a required field

**Figure 5 - The Teacher Conference Maintenance screen when creating a single time slot for an individual class**

Option	Description
Title	A brief description of the time slot that appears in the Calendar view of the Conference Scheduler.
Class	Class that you are creating the time slot for. <b>Note:</b> This option is only available when you add a single time slot from the Calendar view.
Date	Calendar date for the time slot.
Time	Beginning and end time for the time slot.
Description	Additional information about the time slot, such as conference discussion items. This information can be viewed (and edited) by you and office personnel only, and only when you are editing the time slot. To learn how to edit a time slot, see " <a href="#">Editing a Time Slot</a> " (page 34).

Option	Description
Building	Building where the conference takes place.
Room	Room where the conference takes place.
Attendees	<p>List of all guardians who are assigned to the time slot.</p> <p><b>Tip:</b> Click Update Attendees to assign guardians to the time slot as you create it. To learn more about assigning guardians to time slots, see "<a href="#">Assigning Guardians to Time Slots</a>" (page 24).</p>

**Table 2 - The options available on the Teacher Conference Maintenance screen when creating a time slot for an individual class**

## Adding Multiple Time Slots for an Individual Class or for Specific Classes

If you want to add multiple time slots for an individual class or for specific classes, you add a block of time slots for each individual class. This is helpful when you know that your conferences will be scheduled during a block of time on a certain day.

To add multiple time slots for an individual class or for specific classes:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To use the Class Listing view to add multiple time slots, select the class you want to add multiple time slots for.
  - To use the Calendar view to add multiple time slots, click the Calendar tab.
3. Click Mass Add Time Slots.
4. Configure the Mass Add Time Slots area to determine when and where the conference will occur (Figure 6).
5. In the Class Selection area, clear the Select Any Class check box (Figure 6).
6. Click Classes.

7. Select the Include check box next to each class you want to create time slots for.



**Caution**

If you include multiple classes, a block of time slots is created for *each* class you add. The time slots are created for each class and are scheduled to occur at the same time, causing the teacher to become double-booked.

In some cases, this may be the desired outcome. For example, if a pair of classes are team-taught, you may want to create two groups of time slots (one for each class) for one of the teachers during the same block of time, and have each team teacher responsible for one group of time slots.

If you want to add multiple time slots for your individual classes that do *not* overlap, run this procedure multiple times selecting a single class each time. By entering different dates and/or times for each class, you can create separate blocks of time slots for each class, which do not overlap.

8. Click Save.
9. Click Mass Add and Close.

**Note**

If you added more than one class in step 7, or if at least one time slot has already been created in the specified date/time range, a message notifies you that overlapping time slots will be created.

- Click Yes. A confirmation message appears.
- Click OK.

**Mass Add Time Slots** My Print Queue ? Help Menu

**Mass Add Time Slots**

\* Title: Parent-Teacher Conference

\* Date: 10/21/2016 Friday

\* Start Time: 01:00 PM \* End Time: 03:30 PM

\* Increment (in minutes): 15

Building: 401 Building (401)

Room: A301 Room(A301)

**Class Selection**  **Select Any Class**

Classes

SCI612/05 - SCI 6 INT  
 SCI600/33 - SCIENCE 6  
 MIS704/04 - SUSTAINABILITY 6/7/8

Asterisk (\*) denotes a required field

**Figure 6 - The Mass Add Time Slots screen when adding time slots for individual classes. The Select Any Class check box is cleared.**

## Adding a Single Time Slot for Any Class

When you create a time slot for Any Class, the time slot is available to guardians of students enrolled in any classes that you teach. Creating a single time slot for Any Class is useful when you need to accommodate guardians who are not able to attend a conference during the main time period when conferences are scheduled. You can create one or two time slots for alternative dates or times for guardians who can't attend the main conference.

To add a single time slot for Any Class:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To use the Class Listing view to create a single time slot for Any Class:
    - a. Click All Classes.
    - b. Click Add Time Slot.
  - To use the Calendar view to create a single time slot for Any Class:
    - a. Click the Calendar tab.
    - b. Click Add Meeting.
3. Configure the Teacher Conference Maintenance screen (Figure 7). Table 3 describes the options on this screen.
4. Click Save.

**Teacher Conference Maintenance** My Print Queue ? Help Menu

**Teacher Conference Maintenance** Save Back

\* Title:

\* Class:

\* Date:

\* Time:  AM to  PM

Description:

Building:

Room:

Entity:  ?

**Guardian Attendees** Update Attendees Clear Attendees

<i>There are no records to display; check your filter settings.</i>	
0 records displayed	

Asterisk (\*) denotes a required field

**Figure 7 - The Teacher Conference Maintenance screen when creating a single time slot for Any Class**

Option	Description
Title	Brief description of the time slot that appears in the Calendar view of the Conference Scheduler.
Class	Type of class. As you are creating a time slot for Any Class, select Any Class.  <b>Note:</b> When you create a single time slot for Any Class, you can select a specific class for which the time slot is made available.
Date	Calendar date for the time slot.
Time	Beginning and end time for the time slot.

Option	Description
Description	Additional information about the time slot, such as conference discussion items. This information can be viewed (and edited) by you and office personnel only, and only when you are editing the time slot. To learn how to edit a time slot, see " <a href="#">Editing a Time Slot</a> " (page 34).
Building	Building where the conference takes place.
Room	Room where the conference takes place.
Entity	<p>Restricts the availability of this time slot within Family Access. The time slot is only available to guardians of students who belong to the Entities you select. If you select All Entities, this time slot is available to the guardians of any student who attends any of your classes, regardless of Entity.</p> <p><b>Note:</b> You can change the assigned Entity at any time as long as Any Class is selected in the Class box. To learn how to edit a time slot, see "<a href="#">Editing a Time Slot</a>" (page 34).</p>
Guardian Attendees	<p>List of all guardians who are assigned to the time slot. To learn how to assign guardians to time slots, see "<a href="#">Assigning Guardians to Time Slots</a>" (page 24).</p> <p><b>Note:</b> The Update Attendees button is not available when you are adding an Any Class time slot because the Attendees list is populated based on the class you select.</p>

**Table 3 - The options available on the Teacher Conference Maintenance screen when creating a time slot for Any Class**

## Adding Multiple Time Slots for Any Class

If you want to add multiple time slots for Any Class, you add a block of time slots. This is helpful when you know that your conferences will be scheduled during a block of time on a certain day. You specify the date and time for each time slot you're adding, and the length of time for each time slot.

To add multiple time slots for Any Class:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To use the Class Listing view to add multiple time slots, select the class you want to add multiple time slots for.
  - To use the Calendar view to add multiple time slots, click the Calendar tab.
3. Click Mass Add Time Slots.
4. Configure the Mass Add Time Slots area to determine when and where the conference will occur (Figure 8).
5. In the Class Selection area, verify that the Select Any Class check box is selected (Figure 8).
6. In the Entity box, select an Entity or leave (All Entities) selected.



---

**Caution**

If you have classes in multiple Entities, be mindful of how you create time slots for each Entity. You may not want to travel back and forth between Entities in a single day. This is especially important to consider if guardians from multiple entities can select their own time slots for a conference.

---

**Note**

This option restricts the availability of time slots within Family Access. The time slots are only available to guardians of students who belong to the Entity you select. If you select All Entities, the time slots are available to the guardians of any student who attends any of the teacher's classes, regardless of Entity.

---

**Tip**

You can change the assigned Entity at any time as long as Any Class is selected in the Class box. To learn how to edit a time slot, see "[Editing a Time Slot](#)" (page 34).

---

7. Click Mass Add and Close.



**Mass Add Time Slots** My Print Queue ? Help Menu

**Mass Add Time Slots**

\* Title: Parent-Teacher Conference

\* Date: 10/21/2016 Friday

\* Start Time: 02:30 PM \* End Time: 04:30 PM

\* Increment (in minutes): 15

Building: 401 Building (401)

Room: A305 Room(A305)

Class Selection  Select Any Class

Entity: (All Entities) ?

Asterisk (\*) denotes a required field

**Figure 8 - The Mass Add Time Slots screen when adding time slots for Any Class. The Select Any Class check box is selected.**

# Scheduling Time Slots

You can use Conference Scheduler to add 'Do Not Schedule' times for when you are unavailable for teacher conferences. You may also be asked to add guardians to time slots, remove guardians from time slots, or reassign a guardian to a new time slot. You can send an email to guardians when you assign or reassign time slots.

When guardians are scheduled, rescheduled, or unassigned from a time slot, you receive an email notification confirming the change. If you don't want to receive these confirmation emails you can disable this feature. To learn how to disable this feature, see "[Turning Off Teacher Email Notifications](#)" (page 33).

---

**Tip** Guardians can assign themselves to time slots in Family Access. To learn how guardians sign up for conference time slots in Family Access, see "Teacher Conferences" in the *WSIPC Guide to Family and Student Access for Students and Guardians*.

---

**Note** If you want to change the date or time of the time slot, you can only do this if a guardian is *not* assigned to it. To learn how to change the date or time of the time slot, see "[Editing a Time Slot](#)" (page 34).

If you want to create a new time slot and automatically reassign the guardian to the new time slot, see "[Rescheduling a Time Slot](#)" (page 28) to learn how to do this.

---

## Adding 'Do Not Schedule' Times

You can use Conference Scheduler to add 'Do Not Schedule' times for times when you are unavailable for teacher conferences. When you create 'Do Not Schedule' Time Records, they are created for all of your classes that occur during the specified times.

---

**Note** If 'Do Not Schedule' times are set up in the Schedule Matrix, you don't need to set up duplicate 'Do Not Schedule' Records in Conference Scheduler. However, if 'Do Not Schedule' times are set up in both places, this will not cause problems.

To learn about the Schedule Matrix, see "Viewing Teacher Schedules" in the *WSIPC Guide to Staff*.

---

To add 'Do Not Schedule' times:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Expand the All Classes record.
3. Expand the Conference Time Slots area.

---

**Note** To edit or delete a 'Do Not Schedule' time, expand the Do Not Schedule Times area and click Edit or Delete next to the 'Do Not Schedule' time you want to change or delete.

---

4. Click Add 'Do Not Schedule' Time.
5. In the Date box, select the date for the 'Do Not Schedule' time.
6. In the Time boxes, select the time range for the 'Do Not Schedule' time.
7. (Optional) In the Description box, enter a description for the 'Do Not Schedule' time.
8. Click Save.

---

**Note** If the 'Do Not Schedule' time you are adding is scheduled for a time when a 'Do Not Schedule' time already exists, a message warns you of this.

- If the message appears, click Cancel and change the date and time.
- 

## Assigning Guardians to Time Slots

You can assign guardians to specific time slots once you create the time slots, but you are not required to assign a guardian. Guardians can sign themselves up for time slots in Family Access.

---

**Note** To learn how guardians sign up for conference time slots in Family Access, see "Teacher Conferences" in the *WSIPC Guide to Family and Student Access for Students and Guardians*.

---

You can assign a guardian to a time slot either from the Class Listing view, from the Roster view, or from the Calendar view. Regardless of which method you choose, the functionality is the same. The method you choose depends on your personal preference. Each method is discussed below.

---

**Note** If a guardian is already assigned to a time slot with a Status of Active, you can't assign that guardian to another active time slot that occurs at the same time.

---

## Assigning Guardians to a Time Slot from the Class Listing View

You can assign one or more of a student's guardians to a time slot. This section shows you how to assign guardians to time slots from the Class Listing view.

To assign guardians to a time slot from the Class Listing view:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Expand the class in the list.
3. Expand the Conference Time Slots area.
4. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
5. Locate the time slot and click Add Guardian.

---

**Note** Once you assign a guardian to a time slot that is located under Time Slots for All Courses, the time slot is moved under the correct class in the Specific Course Time Slots area.

---

6. Click Student.
7. Select a student and click Select.

8. Select the check box next to each guardian who will attend the conference.



**Caution**

All guardians from all of the student's families appear in the Student Guardians area. If you are unfamiliar with the student's families, first confirm who will attend the conference.

9. To send an email confirmation to the selected guardians, select the Send an E-mail Confirmation of this selected conference to selected Guardians check box at the bottom of the screen.
10. Click Select.

## Assigning Guardians to a Time Slot from the Roster

The roster allows you to easily identify students whose guardians have not signed up for a conference time slot. You can then assign one or more of a student's guardians to a conference time slot from the roster.

To assign guardians to a conference time slot from the roster:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\By Class Listing.
2. Select the class you want to view a roster for.
3. Click Roster to view the roster for the selected class.
4. Select a student whose guardian is not assigned a conference time slot.
5. Click Add. A listing of available time slots for the current class appears.

**Note**

The time slots that appear in this list include those that have been created for the individual class, as well as those that have been created for Any Class.

6. Select the desired time slot, and click Select.

7. Select the check box next to each guardian who will attend the conference.



**Caution**

All guardians from all of the student's families appear in the Student Guardians area. If you are unfamiliar with the student's families, first confirm who will attend the conference.

8. To send an email confirmation to the selected guardians, select the Send an E-mail Confirmation of this selected conference to selected Guardians check box at the bottom of the screen.
9. Click Select. The selected guardians are added to the selected time slot, and you are returned to the roster.
10. Click Close.

## Assigning Guardians to a Time Slot from the Calendar View

You can assign one or more of a student's guardians to a time slot. This section shows you how to assign guardians to time slots from the Calendar view.

To assign guardians to a time slot from the Calendar view:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Click Calendar.
3. Click an existing time slot to open the Teacher Conference Maintenance screen (Figure 5 on page 14). Table 2 (page 15) describes the options on this screen.
4. Click Update Attendees.

**Note**

If you select an Any Class time slot, the Update Attendees button is not available until you make a selection in the Class box.

5. Click Student.

6. Select a student and click Select.
7. Select the check box next to each guardian who will attend the conference.



**Caution**

All guardians from all of the student's families appear in the Student Guardians area. If you are unfamiliar with the student's families, first confirm who will attend the conference.

8. To send an email confirmation to the selected guardians, select the Send an E-mail Confirmation of this selected conference to selected Guardians check box at the bottom of the screen.
9. Click Select.
10. Click Save.

## Rescheduling a Time Slot

You may be asked to reschedule a time slot for a guardian who is no longer able to attend their originally scheduled time. Rescheduling a time slot allows you to create a new time slot to which the guardian (assigned to the original time slot) is automatically assigned.

**Note**

If the guardian cancels and does not know when he or she can reschedule, you can remove the guardian from the time slot. To learn how to do this, see "[Editing a Time Slot](#)" (page 34).

When you reschedule a time slot, you receive an email notification confirming the change, unless you have turned off this feature. To learn about this feature, see "[Turning Off Teacher Email Notifications](#)" (page 33). You can also choose to send an email to any guardians who are assigned to the time slot to advise them of the change.

When you reschedule a conference time slot, the *original* time slot's Status is automatically set to Rescheduled and the new time slot is marked with a Status of Active. Once the Status of a time slot is set to Rescheduled, you can't change it.

**Tip**

If you want to add a different student's guardian to a time slot with a Status of Rescheduled, manually remove the guardian from the original time slot first. When you remove the guardians from the original time slot, the Status changes to Active.

To reschedule a time slot:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To reschedule a conference from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Click Reschedule next to the appropriate time slot.
  - To reschedule a conference from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click the desired time slot.
    - c. Click Reschedule.
3. In the Date and Time boxes, enter a new date and time.

---

<b>Note</b>	You <i>must</i> enter a new date and time in order to create a new time slot.
-------------	---

---

4. (Optional) Configure the other options on the Teacher Conference Maintenance screen (Figure 5 on page 14). Table 2 (page 15) describes the options on this screen.

---

<b>Note</b>	You cannot change the class or the student attached to the time slot when you reschedule the time slot.
-------------	---

---



5. (Optional) To determine whether email confirmations are sent to the guardians assigned to the time slot, do the following:
  - a. Click Update Attendees.
  - b. Do one of the following:
    - If you want to send email confirmations to the guardians, select the Send an E-mail Confirmation of this scheduled conference to selected Guardians check box.
    - If you don't want to send email confirmations to the guardians, clear the Send an E-mail Confirmation of this scheduled conference to selected Guardians check box.
  - c. Click Select.
6. Click Save.

# Configuring and Sending Conference Email Notifications

You can configure emails to send to guardians who have not yet signed up for a conference. You can also turn off email notifications that you receive when guardians are assigned to, reassigned to, or unscheduled from conference time slots.

---

**Note** Your administrative office can configure reminder emails that are sent automatically before a conference. Contact your administrative office if you would like reminder emails to be sent. To learn about conference reminder automatic emails, see “Configuring Conference Reminder Auto Emails” in the *WSIPC Guide to Conference Scheduler for Office Personnel*.

---

## Sending Conference Sign Up Reminder Emails

You can send emails to guardians who have not yet signed up for a conference time slot. You can define which classes to send these emails for. These emails are sent through the Students Not Signed Up Report.

To send conference sign up reminder emails:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\By Class Listing.
2. Click Students Not Signed Up Report.
3. Click Add.
4. Click Email Layout.
5. Configure the Conference Reminder Email Layout screen (Figure 9). Table 4 describes the options on this screen.
6. Click Preview E-mail.

7. Review the email preview and then click Back.
8. Click Save.
9. Configure the Template Settings area of the Students Not Signed Up Report screen.
10. Leave the Include all Classes check box selected, or clear the Include all Classes check box and click Classes to select specific classes.
11. Do one of the following:
  - If you *don't* want to send the emails now, click Save.
  - If you *do* want to send the emails now, do the following:

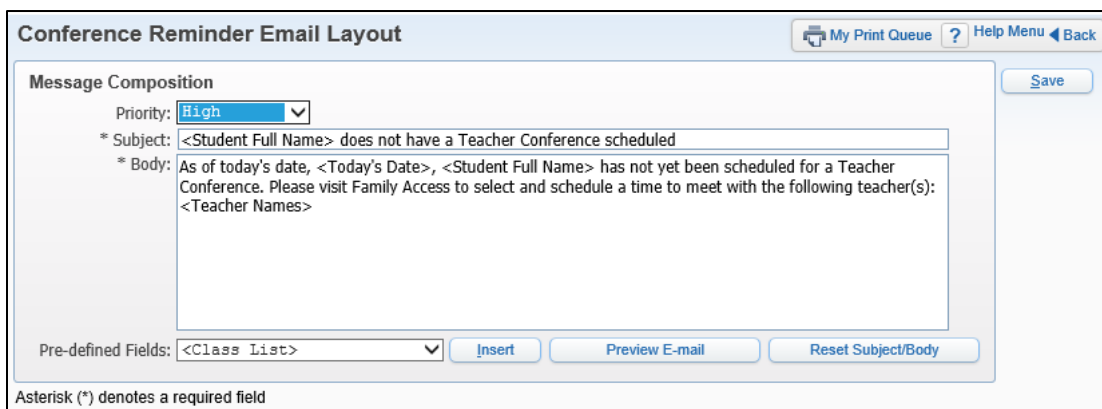
- i. Select the Send Notification Email to Guardians check box.

---

**Note** When you select the Send Notification Email to Guardians check box, the Print Guardians check box is automatically selected.

---

- ii. Click Save and Print. A message warns you that processing this report will send emails to all guardians in the specified range.
- iii. Click OK. The process runs in your print queue and the emails are sent.
- iv. When the report has processed, click View Report to view a report of the emails that were sent.



**Figure 9 - Conference Reminder Email Layout screen**

Option	Description
Priority	Priority for this email.
Subject	Text that appears in the subject line of the email.
Body	Text that appears in the body of the email.
Pre-defined Fields	Adds pre-defined field to the subject line or body of the email. The predefined field pulls data from the software into the email.
Insert	Adds the field you select in the Pre-defined Fields box to the subject line or body of the email.  Place your mouse cursor where you want the field to appear, select the field in the Pre-defined Fields box, and then click Insert.
Preview E-mail	Opens a preview of the email.
Reset Subject/Body	Resets the subject line or body of the email to the default settings.

**Table 4 - Options on the Conference Reminder Email Layout screen**

## Turning Off Teacher Email Notifications

You have the option to turn off email notifications you receive when guardians are signed up for, or reassigned to, or cancelled from your conference time slots. Turning off teacher email notifications does not impact guardian emails. Guardians still receive email notifications.

---

**Note** This feature does not impact other teachers.

---

To turn off teacher email notifications:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Click Options.
3. Select the Do not send email notifications check box.
4. Click Save.

# Managing Time Slots

There may be times when you need to edit or delete a time slot. The following procedures show you when and how to do this.

## Editing a Time Slot

There are times when you may need to edit a time slot. For example, if you originally schedule conferences in one room and that room is no longer available for the entire scheduled time, you can edit the necessary conference time slots to reflect the room change. The fields you can update depend on the Status of the time slot, the type of time slot (individual or Any Class), and whether attendees are assigned to the time slot.

---

<b>Note</b>	You can change the date and time of a time slot, but only if a guardian is <i>not</i> assigned to it. If you need to change the date and time of a time slot a guardian is assigned to, reschedule the time slot. To learn how to reschedule a time slot, see " <a href="#">Rescheduling a Time Slot</a> " (page 28).
-------------	---

---

To edit a time slot:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To edit a time slot from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Click Edit next to the appropriate time slot.

- To edit a time slot from the roster:
    - a. Select a specific class (not All Classes).
    - b. Click Roster.
    - c. Select a student and click Edit.
  - To edit a time slot from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click the desired time slot.
3. Configure the Teacher Conference Maintenance screen (Figure 5 on page 14). Table 2 (page 15) describes the options on this screen.
  4. Click Save.

## Deleting Time Slots

You can delete individual time slots as needed. This may be necessary to accommodate your schedule, or your district's business practices may require you to delete time slots once a conference is over.

---

**Note** You may choose to cancel time slots instead of deleting them. The method you use depends on your district's business practices. To learn how to cancel a time slot, see "[Updating the Status of a Time Slot](#)" (page 46).

---

You can delete time slots regardless of whether or not guardians have signed up for the time slot. If you delete a time slot that a guardian has signed up for, an automatic email notification is sent to notify the guardian that he or she is no longer signed up for a conference time slot.

## Deleting a Time Slot from the Class Listing View

If you need to delete a time slot, you can do so from the Class Listing view.

To delete a time slot from the Class Listing view:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Expand the class.
3. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
4. Click Delete next to the appropriate time slot.
5. Click Remove Time Slot.
6. If a guardian has signed up for the time slot that is being deleted, a message asks you to confirm that you want to delete the time slot. Click Yes.

## Deleting a Time Slot from the Calendar View

If you need to delete a time slot, you can do so from the Calendar view.

To delete a time slot from the Calendar view:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Click the Calendar tab.
3. Click the time slot to be deleted.
4. Click Delete.

## Deleting Multiple Time Slots

You can use the Mass Delete Time Slots option to delete a block of time slots in a specified range. You must specify the date and time for each time slot you're deleting. You can delete multiple time slots for All Classes or for individual classes. This process deletes time slots for your classes; it does not delete time slots for other teachers' classes.

To delete multiple time slots:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Click Mass Delete Time Slots.
3. Configure the Mass Delete Time Slots screen (Figure 10). Table 5 describes the options on this screen.
4. Do one of the following:
  - To delete time slots for All Classes, select All Classes.
  - To delete time slots for an individual class, clear the All Classes check box, and then click Classes to select the class that you want to delete time slots for. Click Save when you are finished.



**Caution**

If you select multiple classes in this area of the screen, a block of time slots is deleted for *each* class you add to the Selected Classes area. Time slots are deleted for each class in the date and time range you enter.

5. Click Process.

**Tip**

When the process is complete, you can click Preview Data to Process to view the time slots that will be deleted.

6. Click Preview Data to Process.
7. Expand your name record and review the time slots that will be deleted.

**Note**

You can't use the Remove Record button to remove individual time slots from the process. If you want to change the time slots that are deleted, go back to the Mass Delete Time Slots screen and change the ranges.

8. Click Back.
9. Click Run the Update. A confirmation message appears.



10. Click OK.
11. When the process is complete, click Display Report to view a report of the time slots that were deleted.

### Mass Delete Time Slots

**Mass Delete Time Slots** Process

**Process Information**

This process will delete teacher conference time slots for all staff members, courses, and times within the specified ranges. When run from "My Conference Scheduler," only time slots for the current teacher will be deleted.

Note: If specific classes are selected, time slots for "Any Class" will not be deleted.

**Class Selection**

All Classes Classes

School Year: 2016-17 ▼

**Conference Ranges**

<p>Low</p> <p>* Date: <span style="border: 1px solid #ccc; padding: 2px 5px;">01/01/1900</span> </p> <p style="margin-left: 20px;"><b>Monday</b></p> <p>* Start Time: <span style="border: 1px solid #ccc; padding: 2px 5px;">12:00</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">AM</span></p>	<p>High</p> <p><span style="border: 1px solid #ccc; padding: 2px 5px;">12/31/2999</span> </p> <p style="margin-left: 20px;"><b>Tuesday</b></p> <p><span style="border: 1px solid #ccc; padding: 2px 5px;">11:00</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">PM</span></p>
--	--

Include Conferences with Guardians Signed Up

Include Conference 'Do Not Schedule' Times

Only Process Time Slots with the Following Entity Value ?

Entity: (Blank - All Entities) ▼

Asterisk (\*) denotes a required field

**Figure 10 - The Mass Delete Time Slots screen allows you to delete a group of Time Slots**

AREA	PURPOSE OF AREA
Class Selection	Allows you to choose the classes that you need to delete time slots for.
Options in This Area	Description of Options
All Classes	Deletes the created time slots of any guardians with students in any of your classes. This applies to individual class and Any Class time slots.

Options in This Area	Description of Options
Classes	<p>Allows you to select a specific class or classes from which the time slots can be deleted.</p> <p>If you select multiple classes, a block of time slots is deleted for each class you select. Time slots are deleted for each class in the date and time range you enter.</p> <p>When you select specific classes, time slots for Any Class time slots are <b>not</b> deleted.</p> <p>This button is only available when the All Classes check box is cleared.</p>
School Year	School Year to delete time slots for.
AREA	PURPOSE OF AREA
Conference Ranges	Configuration options that affect each time slot you are deleting.
Options in this Area	Description of Options
Date	Calendar date for the time slot.
Time	Time or range of time specific to the conference you want to delete.
Include Conferences with Guardians Signed Up	Deletes times slots guardians have signed up for.
Include Conference 'Do Not Schedule' Times	Deletes time slots marked as Do Not Schedule in Conference Scheduler.
Only Process Time Slots with the Following Entity Value	Deletes time slots assigned to the Entity selected in the Entity box. This includes Any Class time slots and those assigned to a class from a specific Entity. This option does not affect 'Do Not Schedule' time slots'.

Options in this Area	Description of Options
Entity	Entity for the time slots you want to delete.  This option is only available if you select the Only Process Time Slots with the Following Entity Value check box.

**Table 5 - Options on the Mass Delete Time Slots screen**

# Managing Time Slot Notes

Office personnel and teachers can add notes to conference time slots. If a note is not marked as Protected, it can be viewed by office personnel, the teachers who added the note, and any guardians assigned to the time slot. You can use time slot notes to maintain a list of conference items for discussion.



## Caution

Notes are attached to the time slot, and not to the student/guardian in the time slot. If you add a note about the student to the time slot that student's guardian is scheduled to attend, and then the student's guardian is removed from that time slot and another guardian is assigned to it, the original note stays with the time slot and is viewable to the new guardian.

## Adding a Note to a Time Slot

When you add a note to a conference time slot, it is visible to you, office personnel, and any guardians who are assigned to the time slot. However, if you or office personnel create a note and mark it as Protected, that note is only visible to the person who created it.

To add a note to a conference time slot:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To add a note to a conference time slot from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Click Add Note next to the appropriate time slot.

- To add a note to a conference time slot from the Calendar view:
  - a. Click the Calendar tab.
  - b. Click on the appropriate time slot.
  - c. Click Notes.
  - d. Click Add.
- 3. Configure the Conference Note Maintenance screen (Figure 11). Table 6 describes the options on this screen.
- 4. Click Save.

**Figure 11 - Conference Note Maintenance screen**

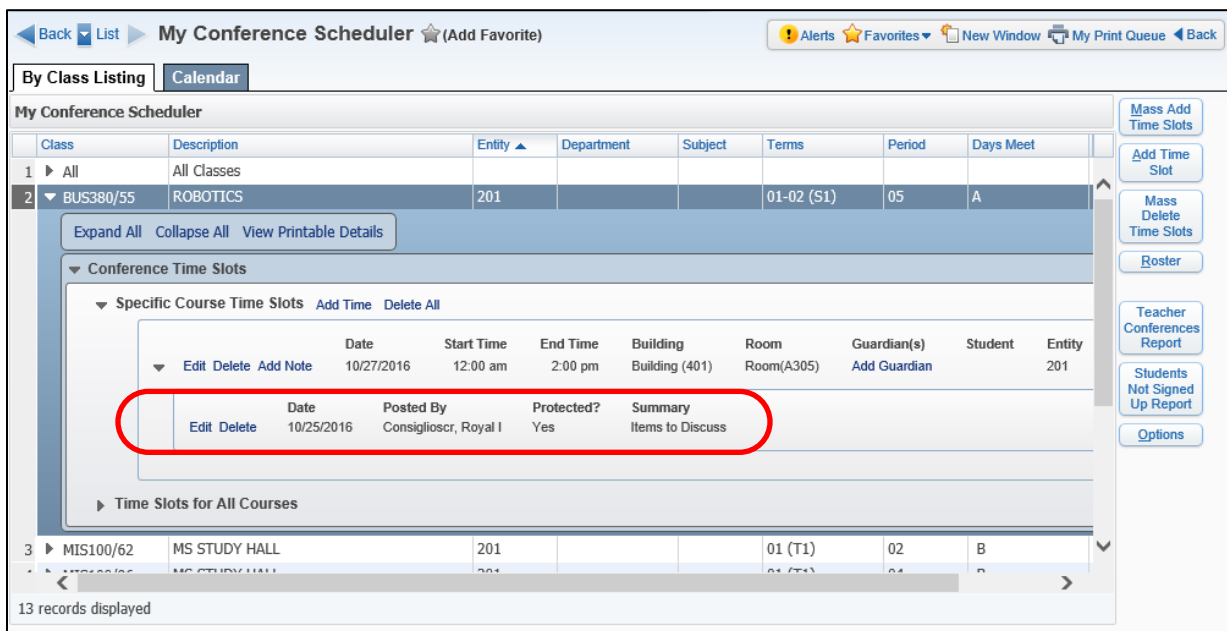
Option	Description
Date	Attaches a date to the note. Defaults to the day on which you add the note, but you can choose another day if desired.
Protect Note	Makes the note visible to the person who created it only. If you don't select this check box, this note is visible to office personnel and to any guardians assigned to the time slot.
Summary	Brief description of the note.
Comment	Additional information related to the conference. Text entered in this field is visible only when the note is viewed or edited.

**Table 6 - Options on the Conference Note Maintenance screen**

# Viewing and Editing a Note

Notes can be viewed by anyone who has access to conferences. This includes you as the teacher, office personnel, and any guardians who have signed up for the conference time slot. If you create a note and select the Protect Note option, the note is visible to you only. If another user creates a note and selects the Protect Note option, that note is not visible to you.

When you create a note, it appears in the Class Listing view with an Edit option. Notes created by others have a View option available, because you cannot edit a note that you didn't create. Figure 12 shows an example of how notes appear in the Class Listing view.



**Figure 12 - Notes that you create are editable. Notes that others have created are view-only.**

To view and edit a note:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To view or edit a note attached to a conference time slot from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Expand the appropriate time slot.
    - d. Click View or Edit next to the note.
  - To view or edit a note attached to a conference time slot from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click on the appropriate time slot.
    - c. Click Notes.
    - d. Select the note.
    - e. Click View or Edit.
3. When you are done viewing or editing the note, click Save or Back.

## Deleting a Note

You can delete notes that are no longer needed, even if you did not create the note. For example, if you added a note to a time slot that indicates a discussion item for the conference, and that discussion is no longer necessary, you can delete the note entirely.

To delete a note:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To delete a note attached to a conference time slot from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Expand the appropriate time slot.
    - d. Click Delete next to the note. A message asks you to confirm that you want to delete the note.
  - To delete a note attached to a conference time slot from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click on the appropriate time slot.
    - c. Click Notes.
    - d. Select the note.
    - e. Click Delete. A message asks you to confirm that you want to delete the note.
3. Click Yes.



# Closing or Cancelling a Conference

After conferences are over, you can update the Status of the conference time slots from Active to Completed or Cancelled. You can also track whether guardians attended the time slot they were assigned to.

---

**Note** Your district may choose the delete conference time slots instead of closing or canceling them. The process you use is determined by your district's business practices.

---

**Tip** Office personnel can update the Status of multiple time slots at one time. If office personnel are responsible for updating the Status of individual conference time slots once conferences are over, you can print a copy of the Teacher Conference Report and track conferences as they occur. You can then return the report to the office so that office personnel can update the Status on conference time slots. To learn more about the Teacher Conference Report, see "[Teacher Conferences Report](#)" (page 51).

---

## Updating the Status of a Time Slot

When you create a time slot, that time slot is given a Status of Active. The Status field becomes available when you edit a time slot. When a conference is over, you can change the Status of a time slots to Completed or Cancelled.

---

**Note** A guardian can only have one Active time slot for each of his or her student's classes at a time during a given school year. If conferences are scheduled more than once during a school year (and your district does not delete time slots once conferences are over), the Status of previous conference time slots must be changed to Completed or Cancelled before a guardian can sign up for a new time slot.

If your district's business practices require you to delete time slots after a conference, see "[Deleting Time Slots](#)" (page 35) to learn how to do this..

---

**Tip** Office personnel can use the Mass Update Teacher Conference Time Slots Utility to update the Status of multiple time slots at once. Contact your administrative office if you would like to use this utility.

---

When you reschedule a conference time slot, the *original* time slot's Status is automatically set to Rescheduled and the new time slot is marked with a Status of Active. Once the Status of a time slot is set to Rescheduled, you can't change it unless you first remove the guardians from the Rescheduled time slot. To learn more about rescheduling a time slot, see "[Rescheduling a Time Slot](#)" (page 28).

---

**Tip** When you remove the guardians from a Rescheduled time slot, the Status changes to Active.

---

To update the Status of a time slot:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To update the Status of a time slot from the Class Listing view:
    - a. Expand the desired class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Click Edit next to the desired time slot.
  - To update the Status of a time slot from the Roster view:
    - a. Select the desired class.
    - b. Click Roster.
    - c. Select a student and click Edit.
  - To update the Status of a time slot from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click the desired time slot.
3. In the Status box, select a new status.
4. Click Save.

# Tracking Guardian Attendance

Conference scheduler allows you to track which guardians attended the time slots they were assigned to.

---

**Note** If, as part of your district's business practices, you delete time slots once conferences are over, you may choose not to track guardian attendance. To learn about deleting time slots, see "[Deleting Time Slots](#)" (page 35).

---

To track guardian attendance:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Do one of the following:
  - To track guardian attendance from the Class Listing view:
    - a. Expand the class.
    - b. Expand the Specific Course Time Slots area or the Time Slots for All Courses area to view time slots.
    - c. Click Edit next to the appropriate time slot.
  - To track guardian attendance from the Roster view:
    - a. Select the desired class.
    - b. Click Roster.
    - c. Select a student and click Edit.
  - To track guardian attendance from the Calendar view:
    - a. Click the Calendar tab.
    - b. Click the desired time slot.

## Closing or Cancelling a Conference

3. In the Guardian Attendees area, select the check box next to the name of each guardian who attended the conference.
4. Click Save.

# Reports

From Conference Scheduler, you can run the Students Not Signed Up Report and the Teacher Conferences Report. Each report is described below.

## Students Not Signed Up Report

The Students Not Signed Up Report provides a list of students, their alphakeys, and their guardians who have not signed up for a conference. This report is helpful if you need to identify who has not already signed up for a conference.

---

**Note** You can also use this report to send emails to guardians who have not signed up for a conference. To learn how, see "[Sending Conference Sign Up Reminder Emails](#)" (page 31).

---

To run the Students Not Signed Up Report:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\By Class Listing.
2. Click the Students Not Signed Up Report button on the right side of the screen.
3. Click Add.
4. Configure the Students Not Signed Up Report screen.
5. Click Save and Print.

# Teacher Conferences Report

The Teacher Conferences Report provides a list of time slots and their scheduled attendees that you can sort by day or by teacher. This report is helpful if you want to post a printed schedule of conferences outside your classroom that shows when conferences are in session. You can define which Entities to include in this report.

---

**Tip** Office personnel can update the Status of multiple time slots at one time. If office personnel are responsible for updating the Status of individual conference time slots once conferences are over, you can print a copy of the Teacher Conference Report and track conferences as they occur. You can then give the report to the office so that office personnel can update the Status on conference time slots. To learn how to update the Status of a time slot, see "[Updating the Status of a Time Slot](#)" (page 46).

---

To run the Teacher Conferences Report:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler\By Class Listing.
2. Click the Teacher Conferences Report button on the right side of the screen.
3. Click Add.
4. Configure the Teacher Conferences Report screen.
5. Click Save and Print.

# Working with Team Conferences

Team Conferences allow your district to set up conferences for Scheduling Teams. If you are part of a Scheduling Team, you will see a Scheduling Team Record in Conference Scheduler on the By Class Listing tab (Figure 1 on page 6). As a member of the Scheduling Team, you can't add individual time slots for Team Conferences, but you can add and remove guardian attendees for Team Conferences that you are assigned to. You can also add notes to Team Conference time slots.

To work with Team Conferences:

1. Go to Educator Access Plus\Teacher Access\My Conference Scheduler.
2. Select the Scheduling Team Record you want to work with.

---

**Tip** Scheduling Team Records are colored green and appear at the top of the list under the record for All Classes (Figure 1 on page 6).

---

3. Expand the Conference Time Slots area.
4. To add guardians to a time slot, do the following:
  - a. Click G next to a time slot.
  - b. (Optional) Select the Send a confirmation email to guardian upon addition or removal from this conference check box.

---

**Note** This email is sent for this specific change only. If you select this check box, the guardians you add or remove at this time will receive a confirmation email. If you then add or remove a guardian again at a later time, this check box is cleared by default and you must select it again at that time to send a notification email for that change.

---

- c. In the Add To Conference column, select the check box for each guardian you want to attend the Team Conference.
- d. Click Back.

5. To add a note to the Team Conference time slot, do the following:
  - a. Next to the time slot, click N.
  - b. Configure the Conference Note Maintenance screen.
  - c. Click Save.



---

**Caution**

Notes are attached to the time slot, and not to the student/guardian in the time slot. If you add a note about the student to the time slot that student's guardian is scheduled to attend, and then the student's guardian is removed from that time slot and another guardian is assigned to it, the original note stays with the time slot and is viewable to the new guardian.

---



# Appendix A – Troubleshooting

This section provides information on some of the most commonly reported Conference Scheduler issues.

## Teacher Conferences do not appear in Family Access

Family Access must be configured to allow Teacher Conferences to appear. Districts typically build their conference schedule (create time slots, create 'Do Not Schedule' times, and assign guardians with very specific needs) before they enable Teacher Conferences in Family Access. This prevents guardians from viewing the schedule before it is ready. Your administrative office can activate Teacher Conferences in Family Access for you.

## Guardians can view but not sign up for time slots in Family Access

The Allow View Only Access option is used to “lock down” the schedule once guardians have signed up for time slots. This is used when a district wants to have a set window of time during which guardians can sign up for conferences. When this option is enabled, guardians can see what time slot they have, but cannot make changes. Your administrative office can configure this option.

## I can't assign a guardian to a time slot

A guardian can only have one Active time slot for each of his or her student's classes at a time during a given school year. If conferences are scheduled more than once during a school year (and your district does not delete time slots once conferences are over), you must change the Status of previous conference time slots to Completed or Cancelled before a guardian can sign up for a new time slot. To learn how to delete a time slot, see [“Deleting Time Slots”](#) (page 35). To learn how to change the Status of a time slot, see [“Updating the Status of a Time Slot”](#) (page 46).

## I am not receiving Confirmation Emails

If you are not receiving email notifications when guardians are signed up for, or reassigned to, or cancelled from your conference time slots, it is likely that the Do not send email notifications check box is selected. To learn how to turn this option off, see [“Turning Off Teacher Email Notifications”](#) (page 33).

---

<b>Note</b>	This feature does not impact guardian emails or notification emails to other teachers.
-------------	--

---

**TERMS OF USE**

The information contained herein is licensed, trade-secret and proprietary and may not be used, disclosed or reproduced without permission of the licensing authorities, WSIPC and/or Skyward, Inc. As a condition of use, the User agrees to protect and keep the information from disclosure or falling into the public domain. The failure to comply with this agreement may result in the immediate termination of the User's right to access the information.

**COPYRIGHT**

© Copyright 2016 WSIPC. All rights reserved.

Reproduction of any part of this manual in any medium without the express and written permission of WSIPC is prohibited by law.

This edition is printed in the United States of America. The contents may be corrected or modified by revisions without prior notice. Pages may be added, deleted, or changed as required.

The WSIPC logo is a registered trademark of WSIPC.

Skyward® is the registered trademark for Skyward, Inc. located in Stevens Point, Wisconsin.

**WSIPC**

2121 West Casino Road

Everett, WA 98204

425.349.6600

[www.wsipc.org](http://www.wsipc.org)