

Allow Teachers to Pre-Book Appointments

By default, teachers have **Appointment Viewer** access only — they can view their schedule but not make changes. Upgrading them to **Resource Administrator/Appointment Maker** access lets them book appointments on behalf of parents, before the scheduler opens to parents.

How to Upgrade Teacher Access

1. Go to **Global Setup / Contacts**.
2. Click **Show Advanced Options**.
3. Click **Modify Access Level**.
4. In the pop-up, select **Appointment Maker** as the new access level, then click **OK**.

All teachers currently set to **Appointment Viewer** will be upgraded to **Appointment Maker**, gaining the ability to book appointments on behalf of parents.

Each teacher will also have access to manage their own schedule.

Booking Appointments in the Admin UI

Booking through the **CUI** (parent-facing scheduler) respects all standard restrictions and limits. To **override** those restrictions — for example, giving a parent extra time with a teacher — book the appointment manually through the **Admin UI** instead.

“ For the PTA product, every appointment must have **both** a student and a parent associated with it.

How to Book an Appointment

1. Select the **Appointments** tab and use the calendar on the left to select the correct day.
2. Select the teacher on the right-hand side, then locate the slot you want to fill.
3. Click the **green plus sign (+)**.
4. Select the student:
 - If the student appears in the list, select them directly.

- If not, uncheck "**Students of [Teacher Name]**" and search for the student by name.
 - Click **OK**.
5. The parent's name will display automatically. If multiple parents are found, select the correct one from the pull-down.
 6. The appointment box will now show both the student's and parent's names.
 7. Select the correct class, if more than one option is available, then click **OK**.

“ If the appointment has a red border: Click it to view the error message below the calendar. Click **Cancel Appointment** to remove it, or **Confirm Appointment** to force the booking and clear the red highlighting.

Other Appointment Options

Click any existing appointment, then open the **Appointments** drop-down to access:

Option	What it does
Confirm Appointment	Confirms a flagged (red) problem appointment
Cancel Appointment	Cancels the appointment, with the option to send a cancellation email
Edit Appointment	Edits appointment-specific details (e.g., custom info collected from parents)
Change Time	Moves the appointment to a new time
Send Reminder	Sends a reminder email to the parent
Customer Info	Opens the Contact Information dialog for the parent

Adding a New Student/Parent

Step 1: Add the Student

1. Go to **Contacts**.
2. Search for the student by name.
3. If not found, click **Add → Student...**
4. Fill in the **Student First Name** and **Student Last Name** (the only required fields).
5. Click **Add**.

Step 2: Add the Parent

1. Search for the parent by name.
 2. If not found, click **Add → Parent...**
 3. Fill in **First Name**, **Last Name**, **ParentID**, and **Email Address**.
 4. Click **Add**.
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Step 3: Connect the Student to the Parent

1. Search for the student by name again.
2. Select the student, then select the small **Parent-Students Map** tab.

“ Under **Parent List**, you'll only see parents already associated with this student.

3. Click the green **Add** button under **Parent List**.
 4. In the **Select Person** dialog, choose the correct parent from the list of contacts without a Student ID, then click **Add**.
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Step 4: Enroll the Student in Classes

1. Go to **Class Editor**.
2. Select the teacher, then the class.
3. In the entry box above the student roster, type the student's name using your account's name format (**Last, First** or **First Last**).

“ Not sure which format your account uses? Check how other students are listed in the same class roster.

4. Press **Enter** when the system finds a match.
 5. Repeat for each class the student should be enrolled in.
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