Making Parent Appointments

1. 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 — you'll need to book the appointment manually through the **Admin UI**.

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

Making Parent Appointments

1. Select the **Appointments** tab.
2. Select the correct date on the calendar (left-hand side).
3. Select the correct teacher, then click the time slot where you'd like to schedule the appointment.
4. Click the **green plus sign**. This opens the **Select Person** dialog.
5. Select the student:
   - If the student is on the teacher's roster, select their name from the list on the right and click **OK**.
   - If the student is **not** on the teacher's roster, uncheck **"Students of [Teacher Name]"**, search for the student by name, select them, and click **OK**.
6. This opens the **Create Appointment** dialog.
7. The parent name will display automatically. Select the correct class (if more than one), then click **OK**.
   Once complete, the appointment box will display both the parent's and student's names.

> **If the appointment has a red border:** Click on it to view the error message shown below the calendar. From here, either click **Cancel Appointment** to remove it, or click **Confirm Appointment** to force the booking and clear the red highlighting.

Other Appointment Options

Click on any existing appointment on the **Appointments** page, 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 fields 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

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