

Blackbaud Checklist

To set up your Parent Teacher Conference event using the PTA scheduler, you will need to follow these steps:

1. INTEGRATE WITH SKY API, SET UP YOUR ACCOUNT, AND SET UP EVENT

You will need to create your conference event and name it appropriately for your conference (ex. Fall 2026 Conferences). You will also need to adjust the settings on your account for the Blackbaud SSO.

2. EXPORT YOUR DATA

Our system will need information from your school to identify the students, the teachers, the classes taught by each teacher, and the enrollment in each class. You will need to export this data from Blackbaud. Once you have exported your data, you should view the data in the Admin UI and verify that it has been imported correctly.

3. CREATE SLOTS FOR THE EVENT

After verifying your data, you can create the time slots (including the date(s), times, and duration of appointments).

4. CREATE THE SSO

[Create the SSO - new schools](#)

This page is for new schools that do not currently have a pickAtime / Blackbaud integration and need to create their SSO link.

[Create the SSO - current schools](#)

This page is for schools that already have a pickAtime / Blackbaud integration and simply need to update their SSO link.

5. CONFIGURE SETTINGS

Appointment Settings

There are several appointment settings that you can modify for the specifics of your event.

Configure Email (optional)

The pickAtime system offers the capability of sending out email confirmations and email reminder notices. You may choose to modify the default settings for these emails.

6. TURN IT ON and TEST THE SCHEDULER

Once your data is complete in the system and you have created the appointment time slots, you can turn on the display of the appointment booking web page.

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