

# PTA FAQs

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# Account

## How do I change the name of my account?

To change the account name, follow these steps in the Admin UI:

1. Navigate to [Global Setup / Business](#) page
2. At the top of the page, select **Business Settings / Business Address / Business Name**.
3. Here, you can edit the account name.

**Please note:** The name change will not be visible immediately. You must log out completely and then log back in to see the updated name.

# Administrators

## Can I have multiple administrators on my account?

You can set up any number of users with Administrative access. To do so, you would go to the [Contacts](#) page, select the **Add > Admin...** button, and then fill in the user information on the **Add New Contact** form. For a full-powered administrator in the Admin Level pull-down, select Administrator.

## What Administrative Access levels are there?

- **Appointment Viewer** - allows a contact to view the appointments made. Teachers are generally assigned only this access.
- **Appointment Maker** - allows a contact to make appointments in the Admin tool, but not change any settings on the account.
- **Resource Administrator** - allows a contact to have administrative access to specific resources (teachers). This would give the contact the ability to edit the schedule for the resource.
- **Event Administrator** - allows a contact to have administrative access to the entire event. Administrator - allows a contact to have full administrative access to the entire account.

## I'm getting the message "email address already exists, can't create doubles" when I add a teacher email address. What does this mean?

This means that the teacher's email address you added already exists with an account in pickAtime. In the Contacts page, search for the email address by entering it in the email box and pressing search. You should see that the teacher's email address already has an account in your Contacts.

## We would like to add another person to our account and give them only report access to a teacher. Is there a way for me to do this without giving any full Admin access?

Yes, you can add another admin with the access level of **Appointment Viewer**. To add an **Appointment Viewer** do the following:

1. **Navigate to Contacts:** In the Admin UI, go to the **Contacts** page.
2. **Add New Admin:** Select the **Add > Admin...** button.
3. **Enter Details:** Fill in the user information on the *Add New Contact* form.
4. **Set Access Level:** In the **Admin Level** pull-down menu, select **Appointment Viewer**.

5. **Save:** Click to finish.

**Note:** If you see a red message stating "*Vendor already has a contact with this email,*" do not panic. Click the blue **Go back** button and use the **Search** tool to find the existing contact by name.

## Assigning Specific Access

Once the contact is created or located:

- Go to the **Vendor Access** tab.
- Locate the specific **Event** and **Teacher** this person needs to monitor.
- Click the **checkbox** next to the name to grant report access.

## First-Time Login Instructions

You can provide these steps to the new admin to help them get started:

- **URL:** Go to [pickatime.com](https://pickatime.com).
- **Step 1:** In the **Login** section, enter your email address and press **Login**.
- **Step 2:** On the following page, you will be prompted to create a unique password for your account.

# Admin UI

## Why is the Appointments List red?

This means that you have appointments that have some sort of problem that needs attention. When a problem appointment is created, the tab will turn red, and the appointment will be listed in red. There are several ways problem appointments are created. Please see the Problem Appointments page.

## On the Appointments List page, I noticed orange appointments with the status 'Customer is creating this appointment'. What do we need to fix these?

Appointments that are in the process of being booked are displayed in orange on the [Appointment List](#) page and cannot be manually deleted or selected for email notification sending. These appointments will be automatically managed and, if necessary, canceled by the system if the user has been inactive for a long time and has not completed creating an appointment. Once the parent completes the appointment booking process and clicks on the Create Appointment button, the status will disappear.

This will allow admins who are booking appointments for clients in the Admin UI tool to not select the time slots that are in the booking process.

## How do I sort my teacher roster?

On the Appointments page, select the Teachers drop-down and then select the Sort Teachers option. This will sort your teachers by the sort order that is listed on the [Global Setup / Business](#) page, in the Account Level Display Options / Display Contact Name as section. The options are last name, first name, or first name last name.

## Every time I change the Open scheduler to customers on one of my events, it changes this on my other events? Why are my events connected?

Go to the Events Preview page, select the Events Settings option, change the setting in the Propagator Mode section, under Propagate Changes to: from all events of this type to only the current event. This setting allows you to make changes to one event apply to all your events.

## Is there a way to allow my parents to only see a certain event on our account?

Yes, you can use the [Category Sort](#) option to control what is seen and how it is seen on your account.

# Appointments

**I would like to offer Virtual appointments for part of the day (e.g., morning/early afternoon) and In-Person appointments for another part of the day (e.g., evening). Can I set that up?**

Yes, you can. Simply create separate time slots for each appointment type:

- Use the "*Virtual*" slot type for the morning or early afternoon hours.
- Use the "*In-Person*" slot type for the evening hours.

**A participant accidentally booked an In-Person appointment but needs a Virtual one. How can we change the appointment type?**

There are two options:

- Participant: They can go to the **My Appointments** page, locate the appointment, click Edit, and change the Appointment Type.
- Admin: In the **Admin UI**:
  1. Open the event.
  2. Locate the resource and the corresponding time slot.
  3. Click on the Appointment, then click Edit Appointment.
  4. Change the Appointment Type and save.

**I want to change all booked appointments from In-Person to Virtual (or vice versa). How can I do this?**

In the Admin UI:

1. Open the event.
2. Go to the **Event Management** page.
3. Click Slots / Update Slots.
4. In the Slot Updater pop-up:
  - Set the desired time range.
  - Choose the new appointment type from the Slot Type drop-down.
  - Click OK.
5. A confirmation message will appear, informing you how many existing appointments will be updated.
6. Click OK to proceed. All affected appointments will be updated to the new type.

# Appointment Limits

## How can I limit parents to one appointment per teacher?

With the PTA (Parent Teacher Appointments) product, parents are limited to one appointment per student, teacher/class combination.

## What is PTAN?

The default for each class is one appointment per parent / per teacher. You can change this default to allow for more than one appointment for a specific class. If you go into the Class Editor and click on a teacher, you will see their classes listed. On the far right-hand side of each class is a column labeled PTAN (for Parent Teacher Appointments Number). If you increase this to 2, then any parent of a student in that class can make 2 appointments with that teacher. If you only have some kids in the class you want to allow this for, then probably the best way to do this would be to create a new class and fill this class with your select group of kids. To do this, you would click on the correct teacher name in the Class Editor roster and then click on the Add Class button. Then you would add students to this class. For this new class, you could set the PTAN to 2. Then any parent with a student in this class could book 2 appointments.

## Could you clarify the following settings: "one appointment per class" and "one appointment per teacher"?

Both these settings place additional limits on appointment bookings.

If you check the box "one appointment per class", then a parent with twins (or siblings) in the same class (same teacher) can only book one appointment.

If you check the box "one appointment per teacher", then a parent with a student who has the teacher for two classes can only book one appointment. For example, if student A has teacher B for both Math and Science, the parent will only be able to book one appointment with teacher B.

# Appointments List

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## Appointment Settings

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# Canceled Appointments

## **Can I see a list of Canceled Appointments for a teacher?**

To view canceled appointments: In the [Reporting](#) section, check the Account Reports radio button. Then select the report labeled Canceled Appointments. Click on the Additional report fields / Appointment Fields line to add Student and Teacher to the report. Click on the Additional report fields / Contact's Fields line to add Email to the report. You can sort by the teacher's name to locate all appointments for a teacher.

# Classes

## Classes

### I'd like to hide some classes on my account so parents can not book those classes

If there are classes where you do not want parents to book appointments, you have two options: delete the class or set it to Hidden.

1. Go to the **Class Editor** page.
2. Select the teacher.
3. From the teacher's class list, select the class.
4. On the right-hand side, toggle the Type column from Shown to Hidden.

This will prevent the class from appearing in the parent scheduler.

Alternatively, you can delete the class. Just be careful not to remove the wrong one—if that happens, you'll need to re-import your data.

## Class Scheduling Changes

### How do I add a new teacher without importing again?

In the Admin UI, select the Class Editor tab. Then select the Add Teacher/Team -> Add Teacher tab. A dialog box called Select Person will pop up. Enter in the Last name, First name, and Email of your teacher and then press the Add Contact button. Then press the Ok button. You will then see the new teacher's name listed in your Teacher list in the Class Editor. See also the Modifying Teacher or Room Data section.

### How do I move a class from one teacher to another?

In the Admin UI, select the **Class Editor** tab. Select the Teacher from the list on the left. Select the Class to be moved. Select the Move class button. Select the teacher's name that the class should be moved to

### How do I add a new student to a class?

In the **Admin UI**, select the **Class Editor** tab Click on a teacher, and then click on the Class If your student has already been added to your account, then type in the student name in the empty box on the far right-hand side and press enter If your student has not been added to your account, select the **Enroll Student** icon ( ) above the roster of students. This will bring up a dialog box labeled Select Person. Select the Show Full Dialog button. Select the **Add Contact** button and

enter in the student information in the right-hand side where you see the <not entered> fields and press the Ok button. This will add the student to the class. The student will also be added as a contact on your account. See also the **Modifying Enrollment Data** section. We've opened up our scheduler, but are missing some classes. If you have not made any manual changes to the classes and enrollment within the Admin UI, you can simply import updated class and enrollment files. A new import will not replace what was previously imported, but it will add in any new class and enrollment data. If you have made manual changes in the Admin UI (i.e., changing teachers, moving kids from one class to another), then you will want to import a class file with ONLY the missing class(es) and an enrollment file with ONLY the missing enrollment. These options will not disturb any appointments that have already been made.

## **We've opened up our scheduler, but are missing some classes.**

If you have not made any manual changes to the classes and enrollment within the Admin UI, you can simply import updated class and enrollment files. A new import will not replace what was previously imported, but it will add in any new class and enrollment data.

If you have made manual changes in the Admin UI (i.e., changing teachers, moving kids from one class to another), then you will want to import a class file with ONLY the missing class(es) and an enrollment file with ONLY the missing enrollment.

These options will not disturb any appointments that have already been made.

## **We have a couple of administrators that we would like to show up on each parent's scheduler for booking. Can we do this? Do we need to create a class and enroll all the students in that class?**

Yes, you would need to do the following:

1. Make sure the Administrator/Counselor/Teacher is listed in the Contacts section of your account. If not, then manually add the new contact, making sure there is a TeacherID listed for the contact.
2. Then create a Class File and either import it or manually add the class on the Class Editor page.
3. Create an enrollment file, listing the studentID for each student in the school and assigned to the newly created class.
4. Import your class file (if you have not manually added the class) and import your enrollment file.

Your parents will see that the administrator and class are available for booking.

See also here for more related information: [Adding a class for counselors.](#)

# Contacts

## **Why are the contacts different colors?**

Blue means that the contact (person) has never logged in and taken ownership of their account. Black means that the person has logged in. Also, we have contacts that are marked in red. Red means a problem account - usually indicating that the email address is a duplicate.

# Data Edits

## **I edited the Room Number in the Contacts section, but it does not show up on the Reports.**

When the class file is imported, teacher data is copied onto the resource section in the Appointments page, and will not change unless you edit it on the Appointments page. Editing it in the Contacts section will not update the Appointments page. Make your correction to the room number on the Appointments page by correcting or entering the room number to the right of the teacher's name.

If all teachers have new room numbers, then you can update them via import:

You have to import the Teacher file with the updated Room numbers, then import the Class file, after this action the room numbers would be updated for all individual teachers you have on the event. This would not work for the Team of Teachers; you would need to edit the room number for Teams manually.

# Data Files

## How do I create a tab-delimited text file?

### If you're using Microsoft Excel:

1. Open the File menu and select the Save as... command.
2. In the Save as type drop-down box, select the Text (*tab-delimited*) (\*.txt) option.
3. Select the **Save** button. If you see warning messages pop up, select the OK or Yes button.

### If you're using Google Sheets:

1. Open the File menu in the top left corner of the spreadsheet.
2. Hover over the "Download" option in the dropdown menu.
3. Select "Tab-separated values (.tsv, current sheet)" from the side menu. This downloads the currently selected sheet as a .tsv file.

## The birth dates for my students were imported incorrectly.

Correct your student file and import the file again. The system will look for a matching student ID and then update the security value (birth date) field.

## My teacher (student) names were reversed when I imported them. I had the Last Name in the First Name column and vice versa.

Correct your student file and import the file again. The system will look for a matching student ID and then update the First Name and the Last Name field.

# Data Imports

## **Help! I imported last year's data / the wrong class file**

The easiest solution is to delete all your classes and then re-import a new file.

- Go into the Class Editor and click on the "show only classes" option on the far right-hand side.
- Click on your first class, then shift select your last class to highlight all your classes
- Select the Delete Selected Classes button.
- Import the correct class file

# Date

**I have a current event set on the site, but the date needs to be changed. Is there a way to update the date, but keep the existing appointments?**

Yes, what you can do is move the slots and appointments. This is done in the [Slot Editor](#). Click on the original date on the calendar on the left hand side and then click on the **Move Slots** button. This will allow you to move the slots and appointments to a new date. You will have the option to send out an email notifying participants.

Note that you will want to correct the date you have listed on the Event Setup page, as this does not change when you move the slots.

# Duplicate PTA

## **I'd like to use the Duplicate PTA option, but it is not enabled.**

The "Duplicate PTA" option creates a copy of an old event, including the exact same class and enrollment data. This should only be used if your enrollment data remains unchanged, such as with full-year classes. Please note that it does not duplicate time slot information. We selectively enable this feature to prevent it from being used inadvertently.

If you plan to import new data files, you can create a new event using a previous event as a template. This will copy your previous settings to the new event.

To do this, go to the [Events / Preview](#) page and click the Add button. In the Template event dropdown menu, select your last event and click Add.

If your new event will contain the exact same enrollment data as the previous one, let us know, and we will enable the Duplicate PTA option.

# Emails

## How can I view any emails that have been sent?

This can be viewed on the individual contact level. On the [Contacts](#) page, you can search for a contact by name. Then click on the contact and then click on the small Log tab. This will show a log of appointments booked, canceled, and any emails sent.

## How do I turn off my E-Mail Reminders?

To turn off your reminder emails, go into the [Events Management/Settings / Notification Setup](#) page, and under the Reminder email option, you will see a check box labeled " *Send Reminder Emails*". Uncheck this box.

## E-Mail Reminders

We would recommend that you use the include a table of appointments within the body of the reminder emails. If you go into the **Settings / Notifications Setup** page and select the Reminder email option, you will see a check box (above the body) labeled " Replace the Email Body with the Printable Schedule of Appointments". This will take the schedule of appointments (in a table format) and use this as the body of the reminder email. Any text you add in the Header will show up above the table of appointments.

The format of the printable schedule is set in the **CUI Messages / Print Schedule** section. This table does include the room number.

On the **Settings/UI Setup** page under the Customer **Reminder Email** section, you have checked the box to require a reminder. You also need to enter the number of hours (prior to each appointment) for which the reminder will go out. For the Automatic Reminder Email(s), select the green + under the Send Reminder Emails and then enter the number of hours prior to the appointment you would like the email sent (e.g., 24, 48 etc).

## Can I change the time/verbiage of my reminder emails?

Yes, you can change the verbiage and add/remove the times of your Reminder Emails at any time. These updates will apply to all appointments.

## How do I display the Class name in the Confirmation email to my parents?

The Macro Field for Class Name is \$(CLASS\_NAME). If you are using the Printable Schedule option for the Email Confirmation (recommended), then add a Class Name Column heading on the **Settings / CUI Messages** page under Print schedule / Print schedule headings. Then add in the macro for Class Name on the Print schedule / Print schedule appointment.

I'm testing the confirmation email and I have not yet received it. Does it take a long time?

The confirmation email is sent approximately 20-25 minutes after the parent books their appointments. We do not send the email immediately, as we wait to make sure the parent has completed booking all their appointments

### **I booked and canceled some test appointments. Will I receive any emails?**

If you book and then immediately cancel your appointments, pickAtime will send a cancellation email, but not the confirmation one. Also, for the PTA product, we wait 20 minutes before sending out an email; this is to ensure that the parent has finished booking their appointments.

# Events

## **I want to start with a new event for the Fall. I'd like all the old data to be removed.**

1. Make sure you start with an empty event. On the Events page, click on the " Add " button to add a new empty event.
2. Remove the stored contacts. Go to the [Global Setup / Contacts](#) page, click on the Show advanced options... at the top, and you can see the Remove all customers button. Then select the level to delete for Event Administrators. Parents / Teachers will then log in as a new contact and create a new password.

**IMPORTANT NOTE:** This step should NOT be done after you have imported your data, only before.

## **I have two events, and some of the teachers are the same in both events.**

When you have teachers who are on multiple events, if a parent books an appointment on one event, the corresponding slot on the other event will be blocked out. This is to prevent the teacher from being double-booked. If you block out slots on one event, the corresponding slots for the same teacher on the other event will also be blocked out.

If you would like to block out a time for one of these teachers on one event, but not on the other event, then you should delete the time slot rather than use the block feature.

## **How could I create the conference event with counselors if I have their names and IDs, and their students' rosters?**

You would create your conference event with the type of [PTA](#) as your template. You would then prepare your [data files and import](#) them.

1. Students - take the students' rosters you have and prepare the students' file.
2. Teachers - take counselors' details (First, Last, Email, TeacherID) and prepare a teacher's file.
3. Classes - you need TeacherID, ClassID and ClassName. ClassID could be a combination of the counselor's Last Name + class, e.g., 'Smithclass'. Class Name e.g., 'Counselor Smith'.
4. Enrollment - for enrollment, you would need the student's ID value and ClassID value.

If you only have up to 5 counselors can easily add them manually in the pickAtime, and you can skip the data import of the teacher and class files (steps 2-3 above).

In the Contacts section, search first for the teacher by name. If you do not locate the teacher, click on the Add New button and fill in the middle section (where you see <not entered>). Then, in the

Class Editor, select the Add Teacher/Team -> Add Teacher option and locate your teacher and press select. Then select the Add Class option and add a class. ClassID could be a combination of the counselor's Last Name + class, e.g., 'Smithclass'. Class Name e.g., 'Counselor Smith'.

You can either manually add in students in the Class Editor or import a new enrollment file.

To add students in the Class Editor, click on the counselor's name and then the class. To add the student to a class, click on the class, and simply type in the student's name in the entry box on the right-hand side. Be sure to use the format that is selected for your account (either last name, first name or first name last). When the system finds a match, press **Enter**. The student will then show up in the roster of students for the class. Alternatively, you can import an enrollment file for the class you just added. For the Enrollment file, you would need the student's ID value and ClassID values.

You will also need to create slots for this teacher by selecting the **Create Slots** option from the Slots drop-down on the Appointments page

Is there a way to allow my parents to see a certain event on our account?

Yes, you can use the [Category Sort](#) option to control what is seen and how it is seen on your account.

# Links

## Which link should I give to my parents? The scheduling link for the account or the scheduling link for the selected event?

If you only have one open event on your account, you can give your parents the scheduling link for your account. This URL is located on the [Global Setup / Business](#) page under the Account URL. This link will display any OPEN event on your account to your parents. This means if you have multiple open events, parents will see a pull-down where they can select an event.

You can customize the URL by checking the box "custom URL" and entering in what you would like the **XXX** part to be in the <https://pickatime.com/XXX> URL. For example, if you would like your URL to be <https://pickatime.com/myschool> you would check the box "set custom URL" and enter in myschool in the white box. Note that it will take approximately 5-10 minutes for the new URL to be available.

**IMPORTANT NOTE:** The event URL will take the customer directly to the event. However, if you have any other open events on your account, the event table will be displayed to the parent, and they will be able to toggle to the other events. You can use the **Category Option** if you want to direct a parent to a certain event without an option to toggle to the other opened event on the account.

# Invoices

## How do I view my invoices?

- Log into your pickAtime account from our home page, the Login section.
- Check the radio button for Account Reports.
- Select the report labeled Account - Invoices and Payments from the Report pull-down.
- You will see a list of your invoices and any payments made.
- Click on an invoice # to see the invoice.

## Can I pay my invoice by credit card?

- Log into your pickAtime account from our home page, the Login section.
- Check the radio button for Account Reports.
- Select the report labeled Account - Invoices and Payments from the Report pull-down.
- You will see a list of your invoices and any payments made.
- On this report, you have to press on 'click here'.
- You will see the 'Pay by Credit Card' option.

## Can you call me so I can pay your invoice?

We are unable to take payment over the phone. To pay by credit card, please see the instructions above.

# Parents

## A parent has forgotten her password

- In the Admin UI, select the [Contacts](#) tab
- Search by name for the parent in the Search Control boxes.
- When you locate the parent record, click on the record, and you will see the parent's email displayed in the middle section.
- Click on the Reset PW button.

## A parent entered her student's name, not her own, when creating an account

1. Have the parent log back in and select the Edit Profile option to edit her name on the account.
2. Go into the Admin UI, locate the parent in the Contacts page, and edit her name.

## I have a parent who claims that they booked an appointment, but when they log in, they can't see any appointments

First, go to the Contacts section of the Admin UI and locate the parent by either first or last name. From there, you can check to see if the parent booked with one email and logged into pickAtime with another. You can do this by clicking on the small Log tab and reviewing their activity. Doing this also tells you if the parent had booked and then canceled and failed to re-book, or if the parent never booked at all.

## A parent has logged in via mobile phone. How do they locate a list of booked appointments and manage them?

For parents who have logged in via mobile phone, select the three-bar menu option at the top of the page. Then select (under Main Navigation) the green "My Appointments" option to see your appointments. Next to each appointment is a three-bar menu. Click on it, and you will see up to 4 options to choose from.

## How do parents identify their student?

Parents will identify their student with two pieces of information. Generally, this is a numeric **StudentID** and a **SecurityValue** (usually the student's birthdate). However, if your parents are not familiar with a numeric StudentID, it may be preferable to create a StudentID that is a concatenation of the first and last name (e.g., "BenjaminFranklin").

## My parents do not know their child's StudentID.

You can change the Parent prompt. To prompt your parents for the First Name + Last Name of the student rather than a numeric security value, go to the [Global Setup / Business Setup](#) page of the Admin UI and check the box in the Miscellaneous section where you see "Use First + Last Name as studentID". Parents will also need to enter the SecurityValue (if you have imported a birthdate, then they would enter the birthdate). We do recommend that you go into the Settings / CUI Messages page and adjust the parent prompt labels. These can be found under Student, and then they are called StudentID and SecurityValue. Under the StudentID prompt, you can enter something such as Student First Name + Last Name (e.g., BenjaminFranklin). Under the SecurityValue prompt, it is helpful to provide a formatting example, such as "Student Birth date (e.g., 04/12/99)."

## **When my parent enters in the values for their student, they get an error message, "failed to find student with the values supplied."**

You will need to make sure that the parent is entering the same values for the StudentID and the SecurityValue that you have imported for that student. Search for the student's name in the Contacts page of the Admin UI. In the right-hand side, you will be able to see the values that are on the student's account. Make sure that the parent is entering the values exactly as you imported for the student, or if you have checked the box Use First + Last Name as StudentID on the Global Setup/Business page, Miscellaneous section, make sure they are entering the student's first name concatenated with the last name as the studentID.

You can also add the student to the parent account for them. To do this, on the Contacts page, search on the left-hand side for the parent by name. Select the parent and then select the small Parents-Students map tab. Under the Student List, you will only see the names of any students associated with the parent.

To add a student, click the green "Add" button under the Student List section. The Select Person dialog box will appear with a list of contacts who have the StudentID value. Select the student and then click the Add button, and the contact will be added to the student list.

## **How do I make an appointment for a parent in the Administrative User Interface?**

1. Select the Appointments tab
2. Select the correct calendar date on the left-hand side
3. Select the correct teacher name and click on the slot where you would like to schedule the appointment.
4. Click on the green plus sign (+). This will bring up the Select Person dialog box.
5. The student names for the teacher you have selected will be listed on the right-hand side. Select the student from the list on the right, and press the Ok button. If you need to book an appointment for a student who is not on the teacher's roster, then uncheck the box "students of Teacher Name" and search for the student by name. Then select the student's name and click on the Ok button.
6. This will bring up the Create appointment dialog box.
7. If the parent is already associated with the student, the parent's name will display. If this is the case, select the correct class (if there is more than one class) and press the Ok

button.

8. If a parent is not yet associated with the student, click on the green + button. This will bring up the Select Person dialog box. In the boxes on the upper left-hand side, search for the parent by name. If you locate the parent, click on the parent's name in the list on the right and press Ok. Then select the correct class (if there is more than one class) and press the Ok button.
9. If you do not locate the parent's name, then on the left-hand side, fill in the parent's First Name, Last Name, and Email address (if you have it), and then click on the Add Contact button. Click on the Ok button. Then select the correct class (if there is more than one class) and press the Ok button. You should now see the parent name and the student name displayed in the appointment box.

## **A parent is requesting a longer appointment than our allowed 15-minute schedule. How can I accommodate this request?**

You would need to make the appointment for the parent using the Administrative User Interface (Admin UI). See the Making Parent Appointments section of the site. As the parent is requesting a longer time slot, you will need to schedule two appointments. The second will be flagged with a red box, as it is breaking the rules of only one appointment per parent / per teacher. Select the appointment with the red box and then click on the Confirm Appointment button. This will force the appointment.

## **How do I handle divorced parents who require 2 sets of appointments?**

The system will only allow 1 appointment per parent per teacher. For divorced parents, we have a feature called Clone Student. This will create a second record of the student in the database so that the second parent can make appointments with all the same teachers as the first parent.

1. In the Contacts page, locate the student. Click on the Clone Student button. You will then have two records for the student.
2. If the 2nd parent is already attached to the student, you will be asked if you would like to "clone and separate". Selecting this option will allow you to add the Clone to the 2nd parent.
3. If the 2nd parent is not already attached to the student, have the second parent log in, locate the student by entering a studentID followed by an \* (ex. 1234\*) and birthdate. The second parent will then be able to schedule another set of appointments.

## **How do I search for a parent or student?**

Select the Contacts tab, and in the Search control box, enter the parent's or student's first name or last name and select search. To search for all contacts, simply press Search.

## **How can I see the appointments my parents have made?**

To view the appointments your parent has made, search for the parent's name in the Contacts tab. When you have the correct parent name and email address listed on the right-hand side, select the Appointments tab. This will list the appointments that your parents have made. You will have

the option to either print or email the schedule to the parent.

## **Is there a way to see when a conference was scheduled by a parent? Not the time of the conference, but the time/date it was actually scheduled.**

On the [Reports](#) page, if you click on the Additional report fields link, select Appointment fields, and check the box next to Created Date, you can add the field to the report. Also, on the Contacts page of the Admin UI, you can locate the contact and then select the small Log tab. This will show when the appointment was booked.

## **How can I log in as if I were the parent?**

Locate and select the parent name in the Contacts section of the Admin UI. This will allow you to log in as the parent from your administrative account, without needing to know your parent's account password.

If you do not know the email address your parent used, you can search for the parent name in the Contacts section of the Admin UI. In the Contact Info tab, the email address the parent used will be displayed, and you can copy and paste this to the Login As: box.

If the parent email address is NOT found, you will see a link labeled "Click on the link to add a new contact". Clicking on this will allow you to enter an email address for your parent and then proceed to book appointments on the newly created parent record.

If the parent has booked appointments, you will then see a list of the appointments. You will also have the option of making, changing, or canceling appointments for the parent. The parent will receive the confirmation/reminder emails, while our system will note in the log section of the parent's contact account that you booked on their behalf.

## **A parent has a student at our school and at a neighboring school**

When the parent logs into your scheduling link, she will ONLY be at your link. At the top of the page, she will see any appointments she has booked at the other school, but if she follows your link, she will only be at your school and will only be able to book appointments at your school.

# Passwords

## **A parent called and can not remember her password.**

On the login page, the parent can click on the Forgot Password button. A link will be emailed to the parent with instructions on resetting the password. Alternatively, you can reset the password for the parent in the Admin UI. Go to the Contacts page, search for the parent. Click on the parent name and then click on the Reset PW button.

## **How do I change my password?**

Log in to your pickAtime account. Click on the menu icon on the upper right-hand side, and then select the Edit Profile / Change password option

## **A parent is having trouble with her password.**

Parents can click on the Forgot Password option, and they will get an email that will allow them to reset their password. They can also email [support@pickatime.com](mailto:support@pickatime.com) to reset it as well.

## **Alternatively, in the Admin UI, you can reset the parent password.**

- In the Admin UI, select the [Contacts](#) tab
- Search by name for the parent in the Search Control boxes.
- When you locate the parent record, click on the record, and you will see the parent's email displayed in the middle section.
- Click on the Reset PW button.

## **I've imported my teacher file this year with a new password for my teachers. But it seems that only the password they set last year works?**

Once the teachers have taken ownership of their account and created a password (as they did last year), the import will not change the password. However, on the [Global Setup / Contacts](#) page, if you click on the Show advanced options..., you would see the Default Password section, where you would be able to click on the Reset Admin Password button, select this button, and you will have the option to reset the password by Administrative access level. To reset the password for all your teachers, select the level to reset in Appointment Viewer.

## **My teachers are receiving a message to "contact the Administrator" for a password**

This message would come up if you import a password for your teachers. For these teachers, let them know what password you imported.

Alternatively, you can reset the password for all your teachers. To do so, go to the Global Setup /

Contacts Setup page. Click on the "show Advanced options" setting. Then select the Reset Admin Passwords button to reset all passwords for your teachers. You can also change the default setting for the password.

## **I'm trying to reset the password for a parent, but I'm getting a message that says I can not**

On occasion, you may find that you are unable to reset the password for a parent on your account. If your parent has also logged into another account with pickAtime, such as another school or organization, you will not be able to reset their password. This is for privacy reasons, as parent appointments made on other accounts could be confidential. If you receive this error message, please have the parent contact [support@pickatime.com](mailto:support@pickatime.com) for a new password.

## **Sometimes, when my parents try to log in to the site, they are told they are a bot. Why is that?**

This is a response from Google reCAPTCHA v3. This behavior can happen when a customer has a bad internet connection.

Refresh the page, and try again.

# Reports

## **Our school conferences were last month, but we'd like to view the Reports from the conference. How do I view conference data in the past?**

Log in to your pickAtime account and select your event from the Event pull-down. You will see two empty boxes where you can enter the from date and the to date for your conferences. If your conference date was in the past, enter in date values for the dates of your conferences.

## **Is there a way to sort the Student's Schedule report by student's last name instead of student's first name?**

Yes, in the Admin UI, go to the [Global Setup / Business page](#), Account Level Display Options section. Under the Display Contact Name as setting, you could change from first last to last, first. This will change the sort.

## **Can I email each parent their schedule?**

Yes, in the [Report](#) Selection section, select the Parents' schedule report from the report pull-down. On the right-hand side, you will see the option to email each parent an individual report. This will email each parent their schedule of appointments in a table format.

## **Can I email each teacher their schedule?**

Yes, on the Report Selection page, select the report labeled Teachers' Schedule. You will then see a button labeled Email Report. This will email each teacher their own schedule.

# Rooms

## Why doesn't the Room Number I updated in Contacts show up in Reports?

When you import a class file, teacher data (including room numbers) is copied to the Appointments page under Resources. Once copied, this data does not automatically update when changes are made in the Contacts section.

To correct the room number for a specific teacher, go to the Appointments page and update the room number directly, to the right of the teacher's name.

## Updating Room Numbers for All Teachers

If all teachers have new room numbers:

1. Import an updated Teacher file with the correct room numbers.
2. Then import the Class file.

This process will update room numbers for all individual teachers in the event.

**Note:** This method does not update room numbers for Teams of Teachers — you'll need to update those manually on the Appointments page.

# Scheduler

## **Every time I change the Open scheduler to customers on one of my events, it changes this on my other events. Why are my events connected?**

Go to the [Events Preview](#) page, select the Events Settings option, change the setting in the Propagator Mode section, under Propagate Changes to: from all events of this type to only the current event. This setting allows you to make changes to one event apply to all your events.

## **Can my event span multiple days**

Yes, your event can span multiple days. When you set up your event, click on the Appointments tab. On the calendar on the left, click on your first date of slots and then select the [Create Slots](#) option from the Slots drop-down menu. Then select the next date of your event on the calendar on the left, and continue to create slots on all the days of your event.

## **Can there be multiple sign-ups for the same slot?**

Yes, there can be multiple sign-ups for the same time. When you create your slots, you will have the option of allowing more than one appointment to be made per time slot. When you create the slots, in the Slot Generator dialogue box, there is an area for the maximum allowed appointments per slot. This is where you would enter the maximum number of parents who can select the same time slot. On the scheduling page, once that maximum number has been reached, the slot will not be displayed as an available time slot.

If you would like to update this number after you have already created your slots, you would do this in the Appointments page by selecting the Update Slots option from the Slots drop-down menu. The dialogue box will allow you to update the Maximum allowed appointments per slot for a specific time period or for all time slots.

## **How do I add a logo to my scheduling site?**

To add a logo to your scheduler, go to the [Global Setup / Business](#) page. Under the Account Level Settings / Account Logo, click on the Upload icon to upload your logo.

## **Do you have a Spanish/French version of the scheduling page?**

You can use your browser to translate your page. Review our [instructions](#) on how to do this.

## **What is the link for my parents? Can I customise the link?**

The link for your parents is the link for your account. This URL is located on the [Global Setup / Business](#) page on the bottom left hand side. This link will display any OPEN event on your account

to your parents. This means if you have multiple open events, parents will see a pull-down where they can select an event.

You can customise the URL by checking the box "custom URL" and entering in what you would like the **XXX** part to be in the <https://pickatime.com/XXX> URL. For example, if you would like your URL to be <https://pickatime.com/myschool>, you would check the box "set custom URL" and enter in myschool in the white box. Note that it will take approximately 5-10 minutes for the new URL to be available.

## **How do I test out the scheduler?**

Go to the Online Scheduling link. This will take you into the Online Scheduler. You can add any student to your account and then view the schedule for the students' teachers.

## **When I try to test out the site, I see a message that says "there are no events available" or "the online scheduler is closed"**

This means that you have not made the site available for appointment taking. In the [Settings / UI Setup](#) page, check the start date and end date of Scheduler Availability. In order to view the scheduler, the site must be open for appointment taking.

## **When I try to test out the site, I see a message that says "no slots available?"**

This could mean a couple of different things. This may mean that you have not created any slots for your teachers. It could also mean that your slots have all been filled.

## **Help! My scheduler is not open**

- Make sure you have set the Open scheduler to customers on and the Close scheduler to customers on correctly. This is on the Settings / UI Setup page under the Scheduler Availability section.
- If your parents are seeing a message 'there are no available times', check to make sure you have created slots for your teachers.
- Make sure you are not within the closed booking window, by checking the setting 'Customer cannot book their appointment closer than xx hours/days'. If the appointment date and time are within this window (for example, if the appointment slot is tomorrow and you have this set to 1 day), then the parent will not be able to book an appointment.

## **We've opened up our scheduler, but are missing some classes.**

If you have not made any manual changes to the classes and enrollment within the Admin UI, you can simply import updated class and enrollment files. A new import will not replace what was previously imported, but it will add in any new class and enrollment data.

If you have made manual changes in the Admin UI (i.e. changing teachers, moving kids from one class to another), then you will want to import a class file with **ONLY** the missing class(es) and an

enrollment file with ONLY the missing enrollment.

These options will not disturb any appointments that have already been made

## **We've opened up our scheduler and need to remove some classes.**

From the Class Editor page, you can delete classes. Note that this will not delete any appointments that have been booked for teachers of these classes.

## **Our conferences have been snowed out, we'd like to move all the slots and appointments to a new date**

In the Admin UI, on the Appointments page for your event. Select the date of conferences from the calendar on the left-hand side. Click on the Slots / Move Slots option. Here you will be able to move all slots and appointments to a new date in the future. You will be prompted to select a destination date. You will have the option to send an email to all parents with appointments.

## **We have conferences on two days, and we only need to cancel one day of the conferences. We'd like to let parents continue to book on the day that is not cancelled.**

In the Admin UI, on the Appointments page for your event, you can delete all slots and appointments. Select the date of the conferences from the calendar on the left-hand side. Click on the Slots / Delete Time Slots option. In the dialogue box that comes up you will be able to specify times and dates for the slots you would like to delete. The system will also let you know how many appointments exist on your soon-to-be-deleted slots. You will have the option to cancel all these appointments, and you can choose to send a cancellation email or not.

## **How can I sort my teachers alphabetically on the Scheduler?**

On the Appointments page, select the Teachers drop-down and then select the Sort Teachers option. This will sort your teachers by the sort order that is listed on the Global Setup / Business page, , Account Level Display Options section. Under the Display Contact Name as setting, you could change from first last to last, first.

## **Our scheduler is closed, but our parents could still cancel.**

When the scheduler closes, if the link is still available (either on your website or bookmarked by the parent), parents can still log in and view their schedule. They are not able to book any appointments.

Depending on your cancellation settings, they can still cancel an appointment. This is determined by the setting customer cannot cancel their appointment closer than xx hours/days. This setting is on the Settings / UI Setup page, Appointment Cancellations section. If parents are not able to cancel, then a message displays that they should call the school to cancel.

## **How can I add the Class Name to the scheduler and to the parent email?**

On the Settings / UI Setup page, Scheduler Settings section, check the box separate legend for each child and display class names. This will add the class name to the scheduler. To include the class name on the Printable Schedule for your parents, add the class name to the CUI Messages / Print Schedule -> Print Schedule Headings and Print Schedule Footer. The macro for class name is \$(CLASS\_NAME).

# Students

## How do I see the classes for my students?

In the Admin UI, go to the Contacts page and search for the student. Then click on the small Appointments tab and you will see the classes the student is enrolled in. Make sure that you see all the classes that you should for the student. To add a student to a class, go into the Class Editor page, click on a teacher and then a class, and then click the Enroll Student icon ().

## I need to correct the birthdate for a student

Go into the Contacts section and search for the student by name. Correct the securityvalue (birthdate) field.

## I need to add a new student

In the Class Editor page, you can add a student to the class. Click on a teacher name, and then the class name. Select the Enroll Student icon () on the far right hand side above the roster of students. This will bring up the Select Person dialog box. Click on the Show Full Dialog button. Then click on the Add Contact button and fill in the correct information for the student in the middle section where you see <not entered> (first name, last name, securityvalue, and studentID). Then press Ok . You should see the student added to the roster.

After the student has been added to your account, to add the student to a class, you would simply type in the student's name in the entry box for the class. Be sure to use the format that is selected for your account (either last name, first name, or first name last). When the system finds a match, press Enter. The student will then show up in the roster of students for the class.

## My student's schedule has changed

In the Class Editor page, students can be moved out of classes and added to other classes. To remove a student, you would click on the teacher's name and then the class. Locate the student and select the red x to the left of their name. This will remove the student from the class. To add the student to a class, click on the class, and simply type in the student's name in the entry box for the class. Be sure to use the format that is selected for your account (either last name, first name, or first name last). When the system finds a match, press Enter. The student will then show up in the roster of students for the class.

## How do I remove duplicate students?

To remove older students or the duplicate version of the student, go to Event Management/ Class Editor, check the box 'show only classes' on the right-hand side, then select all classes via the Shift key and click the 'Delete selected classes' button. You would then go to Global Setup/ Contacts and then under the Advanced options, click "remove Students not enrolled in a class". Parents will then have to attach the new version of the student to their account.



# Snow Day

**We have conferences that we need to cancel on account of a snow day. We would like to move all conferences to a new day.**

In the Admin UI, go to the Appointments page for your event. Select the date of conferences from the calendar on the left hand side. Click on the Slots / Move Slots option. Here you will be able to move all slots and appointments to a new date in the future. You will be prompted to select a destination date. You will have the option to send an email to all parents with appointments.

**We have conferences on two days, and we only need to cancel one day of conferences. We'd like to let parents continue to book on the day that is not cancelled.**

In the Admin UI, on the Appointments page for your event, you can delete all slots and appointments. Select the date of conferences from the calendar on the left hand side. Click on the Slots / Delete Time Slots option. In the dialog box that comes up you will be able to specify times and dates for the slots you would like to delete. The system will also let you know how many appointments exist on your soon to be deleted slots. You will have the option to cancel all these appointments, and you can choose to send a cancellation email or not.

**Important Note:** In order to let your parents who had an appointment on your first day of conferences to book on your second day of conferences you will either need to 1) delete all appointments on the first day of conferences or 2) change the Open scheduler to customers on (Settings / UI Setup page) to be a date AFTER your first day of conferences. If you do not do one of these options, any parent who booked on Day 1 will not be able to book on Day 2. Changing the Open scheduler to customers on "resets" our one appointment per student per teacher/class combination.

# Teachers

## How do I sort my teacher roster?

On the Appointments page, select the Teachers drop-down and then select the Sort Teachers option. This will sort your teachers by the sort order that is listed on the [Global Setup / Business](#) page, in the Account Level Display Options / Display Contact Name section. The options are last name, first name, or first name last name.

## I'm getting the message "email address already exists, can't create duplicates" when I add a teacher's email address. What does this mean?

This means that the teacher's email address you added already exists with an account in pickAtime. In the Contacts page, search for the email address by entering it in the email box and pressing search. You should see that the teacher's email address already has an account in your Contacts.

## I have a teacher who needs 15-minute time slots for her First Grade class and 30-minute time slots for her Kindergarten class. She is only showing up one time in the Class Editor and the Slot Editor, so how can I set up different slot durations for her?

The goal is to have her listed twice in the Slot Editor so you can create 30-minute slots for one listing of her name and 15-minute slots for the second listing of her name. To do this, you will need the teacher to be listed twice in the Class Editor.

1. Go to the Class Editor page.
2. Click on the Add teacher button. This will bring up a Select Person dialog box. Locate the teacher's name, click on the name, and then press select.
3. You will now see her name listed two times in the Class Editor.
4. Click on the second listing of the teacher's name. Click on her Kindergarten class and click on the Move Class button. Then click on the first listing of the teacher's name. This will move the Kindergarten class to your first teacher listing.
5. To edit the teacher name (so you can easily identify which class you are creating slots for in the Slot Editor), click on the listing and edit the name. For example, if your teacher's name was Sue Smith, you could modify the first listing of her name to Sue Smith - Kindergarten and the second one to Sue Smith - First Grade.
6. Go to the Slot Editor page.
7. You will see two references to the teacher listed, and you can create slots of different durations for each. Since both listings are assigned to the same contact person, the system will ensure that this teacher does not get double-booked. When a slot is booked for one listing, the corresponding slot on the second listing will be made unavailable.

## **A teacher will no longer be available for conferences. How do I cancel all her appointments?**

Probably the easiest way is to go to the [Appointments List](#) page. Search for all appointments on your event. Then sort by parent Last Name (click on the column heading to sort) and then by Resource (teacher). If you locate your teacher, you will see any parent appointments. You can click on an appointment and then select the Delete / Delete selected button.

## **I need to edit the Room Number for a teacher**

Go to the Appointments page. To the right of the teacher's name, you can edit the room number.

## **I imported teachers, but I don't see my teachers listed in the roster on the Appointments page.**

Teachers that you import on your teacher file should show up in the Contacts section of the Admin UI. They show up in the Appointments page (and Class Editor page) AFTER a class has been imported for them.

## **My 3rd-grade teachers require 15-minute slots, and my 4-5 grade teachers require 20-minute slots? How can I do this?**

Go to the Appointments page. Select your first 3rd-grade teacher from your roster on the right-hand side, then hold down the Ctrl key and select the other 3rd-grade teachers. When you have selected this entire group, select the Create Slots option from the Slots drop-down. You will then be prompted to enter the from and start time of the conferences as well as the duration of the appointments. Create your slots with a duration of 15.

Using the ctrl key option, repeat this process to collect your 4-5th grade teachers. Then select the Create Slots option from the Slots drop-down, and in the Slot Generator dialog box, enter an appointment duration of 20 minutes for this group of teachers.

## **I have a teacher who needs 15-minute time slots for her First Grade class and 30-minute time slots for her Kindergarten class. She is only showing up one time in the Class Editor, so how can I set up different slot durations for her?**

The goal is to have her listed twice in the Appointments page so you can create 30-minute slots for one listing of her name and 15 minute slots for the second listing of her name. To do this, you will need the teacher to be listed two times in the Class Editor.

1. Go to the Class Editor page.
2. Click on the Add Teacher/Team -> Add Teacher button. This will bring up a Select Person dialog box. Locate the teacher's name, click on the name, and then press select.
3. You will now see her name listed two times in the Class Editor
4. Click on the second listing of the teacher's name. Click on her Kindergarten class and click on the Move Class button. Then click on the first listing of the teacher's name. This will

move the Kindergarten class to your first teacher listing.

5. To edit the teacher's name (so you can easily identify which class you are creating slots for in the Appointments page), click on the listing and edit the name. For example, if your teacher's name was Sue Smith, you could modify the first listing of her name to Sue Smith - Kindergarten and the second one to Sue Smith - First Grade.
6. Go to the Appointments page.
7. You will see two references to the teacher listed, and you can create slots of different durations for each. Since both listings are assigned to the same contact person, the system will ensure that this teacher does not get double booked. When a slot is booked for one listing, the corresponding slot on the second listing will be made unavailable.

## **I've already opened my scheduler. Can I add a new teacher?**

To add students in the Class Editor, click on the teacher's name, then the class. To add the student to a class, click on the class, and simply type in the student's name in the entry box on the right-hand side. Be sure to use the format that is selected for your account (either last name, first name, or first name last name). When the system finds a match, press Enter. The student will then show up in the roster of students for the class. Alternatively, you can import an enrollment file for the class you just added. count (either last name). You will also need to create slots for this teacher by selecting the Create Slots option from the Slots drop-down on the Appointments page.

## **My teachers are receiving email notifications every time an appointment is booked. How do I turn this off?**

To turn off the email message that your teacher received, go to the Settings / Notification page, Resource Email Notification section, and uncheck the box "For resources assigned to a contact, send appointment notification via email" - this sends an appointment notification email any time a parent books or cancels an appointment.

## **I have some time slots that are grey with the message "An appointment has been booked with 'teacher name' at this time"**

When you see a message like this, it means that either there is a different teacher contact attached to the resource or there are multiple teachers attached to the same resource. The system doesn't allow for double booking and therefore blocks out the time slots. To correct this, go to the Class Editor and click on the teacher resource that is experiencing this issue and then click on the "Assign Contact / Team" menu and select "Assign Contact." From within the dialog box, you will see the current teacher contact that is attached to the resource. Click on the name of the correct teacher and then click Ok and the boxes will go back to normal.

## **I'm seeing the message "teacher not available" in the Admin UI.**

This means that the teacher has either an appointment booked in their role as a parent, or they are part of a team and they are booked in their role as a team member.

## **Can I email my teachers their schedule?**

Yes, on the Report Selection page, select the report labeled Teachers' Schedule. You will then see a button labeled Email Report. This will email each teacher their own schedule.

## **Some of my teachers are at two different events, both the High School event and the Middle School event. I blocked out slots on the High School event when they wouldn't be available, but this also blocked out their times on the Middle School event as well.**

Yes, blocking slots in one event will block out the corresponding time slots on the second event for any teacher sharing the same contact record (matching email address) across events.

Deleting slots for a teacher in one event will NOT delete slots for a teacher in another event. If you have a teacher who is not available at the High School during some times, but is available at the Middle School, you will need to delete the slots on the High School event.

## **How do I set my teachers' passwords?**

You can either import a password into the teacher file or let your teachers create their own when they first log in. If you did not import a password for your teachers, the first time a teacher logs in, he/she will be prompted to create a password for their account.

## **How do I reset a password for a teacher?**

In the Admin UI, select the Contacts tab. In the Search control boxes, enter the teacher's first name or last name and select search. Click on the teacher name listed in the left hand side. Click on the Reset PW button. This will reset the password to the default password of 123456. You can change this default password by selecting the Global Setup / Contacts page. If you click on the Show advanced options..., you would see the Default Password section, here you would be able to change the default password that is used when you select the Reset PW button.

## **How do I reset the passwords for all my teachers?**

In the Admin UI, go to the Global Setup / Contacts page. If you click on the Show advanced options..., you would see the Default Password section, here you can find the Reset Admin Passwords button. Select this button and you will have the option to reset the password at the administrative access level. To reset the password for all your teachers, select the level to reset of Appointment Viewer.

## **The Reset PW button is not available when I select a teacher.**

This is most likely the case when your teacher is a parent at another school. In this case, the email address is associated with 2 different accounts, and can not be reset by either one of the two accounts. The teacher can select the Forgot Password button and have a new password emailed to him/her, or he/she can email pickatime support ([support@pickatime.com](mailto:support@pickatime.com)) and request that the password be reset.

## **One of my teachers can not view her schedule. How do I fix this?**

There are a couple of things to check for a teacher.

In the Contacts section of the Admin UI, locate the teacher contact record.

- 1) make sure she is using the email address listed in the contacts.
- 2) make sure the Admin Level pull-down is set to Appointment Viewer.
- 3) make sure the box next to her name in the Resource Access section is checked.

In the Reporting section, if you select the Account Reports option, there is a report labeled List of Teachers. You can quickly scan this to see the access levels for your teachers.

When teachers are imported, they are automatically set up with Appointment Viewer access, and with the box checked by their name in the Resource Access section. This allows them to view their own schedule in the Reporting section.

If you added a teacher in manually, then you would need to set both the Admin Level to Appointment Viewer and check the box by their name in the Resource Access section.

## **How do my teachers view who has signed up? How do my teachers log in?**

Teachers can view their schedule by logging into the site as well. From your school's account URL, your teachers should enter their email address and password in the Login section. Each teacher will only have access to his/her own schedule. Click [here](#) (Directions for Teachers) for a printable template of instructions for your teachers.

## **How do I block out time for a teacher?**

To block out a time for a teacher, you can either:

Delete the time slots using the Delete Time Slots option in the Slots drop-down on the Appointments page, or make the slots unavailable with the Update Time Slots option from the Slots drop-down on the Appointments page. If you select the Update Slots option, a dialog box will come up where you can enter in the times to make unavailable, and then select "make unavailable" from the drop-down option.

## **How do I correct the spelling of a teacher's name?**

- Go into the Admin UI.
- Then select the Appointments page. Click on the teacher's name and then select Assign Contact from the Teachers drop-down menu.
- The Select Person dialog box will come up with the teacher contact record. Correct the spelling and then press select in the dialog box.

This will update the teacher's name.

## **One of my teachers has gone on leave and will be replaced by a long-term substitute teacher. How can I let parents see the new teacher's name?**

If a teacher is being replaced with a different person, such that all the classes taught by the former will now be taught by the new teacher, you can reassign the teacher by going again to the Class Editor tab.

- Select the teacher that you want to replace and select Assign Contact/Team, Assign Contact. A dialog will pop up that is very similar to the contacts tab.
- Search for and select the new teacher, then click "select."

# Teams

## How do teams work?

A team can be simply a label for a teacher, such as "Team Blackhawks," or a team can be a combination of individual teachers. In the pickAtime system, when you create a team of more than one teacher, we concatenate the teacher names so the team might look something like "Andrea Smith; Barbara Zook."

When a team is created by combining teachers, the system ensures that the teacher can not be double booked. For example, if you have team "Andrea Smith; Barbara Zook" and team "Andrea Smith; Bob Jones", when a time slot is booked with team "Andrea Smith; Barbara Zook" the system automatically blocks out the corresponding slot for "Andrea Smith; Bob Jones."

Another example could be where you have individual teachers and teams. If you have a teacher "Andrea Smith", teacher "Barbara Zook, and team "Andrea Smith; Barbara Zook", when a time slot is booked with teacher "Andrea Smith" the corresponding time slot with team "Andrea Smith; Barbara Zook" is blocked out. Note, however, that the time slot for "Barbara Zook" would not be blocked out as she is still available.

## Our school has a class that is team-taught. Can I create a team?

You can assign two teachers to one class, and then create slots for this team of teachers. These teachers can then also have slots for their classes where they teach individually. The system will ensure that they are not double booked. The teacher is then able to view their schedule as a co-teacher and as an individual teacher.

To do this, you can either import on the class file, the name of this class in the classID column, and the two teacher ID's in the teacher column, with the teacherID's separated by a semi-colon.

Or you can combine your teachers into a team after you have imported your data. To do so, you would do the following:

1. Go into the Class Editor
2. Select Add Teacher/Team -> Add Team
3. In the Select Person dialog box that displays, search and click on the first teacher you would like on your team, then click on the 'Add to Team' button on the Select Person pop-up window in the top left corner. Then search and click on the 2nd teacher you would like in the team, then click on the 'Add to Team' button.
4. Once you have your team selected, all team members would be listed in the top-left corner of the Select Person pop-up window - press the Ok button.

You would then want to create a class for that team or move a class from an individual teacher to the team.

## **I've already imported my data. I have two teachers and their classes imported, and I want to combine them into a team.**

In the **Class Editor**:

1. Select the Add **Teacher/Team** -> **Add Team** option
2. In the Select Person dialog box that displays, search and click on the first teacher you would like on your team, then click on the 'Add to Team' button in the top left corner. Then search and click on the 2nd teacher you would like on the team, then click on the 'Add to Team' button.
3. Once you have your team created, all team members would be listed in the top-left corner of the Select Person pop-up window, then press the Ok button.
4. You will then see both teachers' names listed in the Class Editor, separated by a semi-colon (e.g., Teacher A; Teacher B)

To add classes to the team:

1. Click on Teacher A, click on Teacher A's class, and click on Move Class. Then click on your team of Teacher A; Teacher B. This will move Teacher A's class to the combined teacher. Repeat for Teacher B
2. Click on the individual teacher (Teacher A) and select the Remove Teacher button. Repeat for Teacher B

On the **Appointments** page:

1. Click on this new combined teacher (Teacher A; Teacher B). Click on the Create Slots option on the Slots drop-down and create slots for this teacher
2. Optionally add in a room number

# Time Slots

## **I created slots on the wrong date?**

On the Appointments page, select the Slots drop-down and then select the Move Slots option. This will allow you to move all slots (and any appointments) to a new date. You will have the option to send an email to any appointment that is being moved.

## **My slots are 20 minutes in duration, but I want a 30-minute break in the middle.**

If your break will not have the same duration as your slots or is not a multiple of your slots (e.g., you have slots of 20 minutes, and you want a 30-minute break), you will need to create your slots in sections. First, create the slots BEFORE your break time, and then create your slots AFTER your break time.

## **Why are some of my time slots grey?**

Grey time slots indicate that the teacher is booked elsewhere and is not available at that time. Either the teacher is having meetings as part of a team, or the teacher has booked her own appointments in her role as a parent. If you click on a grey time slot, a message will display telling you where the teacher is booked.

## **Why are some of my time slots yellow?**

PickATime automatically displays older Time slots in yellow to indicate that the scheduled time has already passed. These slots will not appear to your participants. Check the date of the slots, and either delete them or move them to the correct date. Slots on the correct date will be blue and will allow you to book and block.

## **I created time slots with the wrong duration.**

Time slots can not be changed from one duration to another. If you need a different duration than what you originally created, you will need to delete your time slots with the incorrect duration and create new time slots with the correct duration.

## **I created time slots with the wrong duration, but my customers have already booked appointments.**

Time slots can not be changed from one duration to another. If you need a different duration than what you originally created, you will need to delete your time slots with the incorrect duration and create new time slots with the correct duration. When you delete the time slots, the system will ask you what you want to do with the appointments. You can cancel them and send an email to each customer requesting that they reschedule their appointment. Or you can put the appointment "on hold" and then cancel and manually re book each appointment.

After selecting the Delete Time Slots option, you will see a new dialog box telling you the number of appointments on your soon to be deleted slots.

The default option is set to move the appointments to a holding area on the Appointments List page. If you choose this option, you will have a list of the appointments that you need to either cancel or reschedule.

# Working in the Admin UI

**Help! The time slot boxes in the Admin UI are really small. How can I adjust this?**

Put your cursor on the line indicating the time on the left-hand column. You can then stretch or shrink the size of the boxes. Alternatively, you can go to the [Settings / Vendor View Setup](#) page and adjust the Time Slot Display Scale.