

# 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.

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Revision #3

Created 2026-04-07 22:51:02 UTC by Tara Cicora

Updated 2026-04-22 22:26:21 UTC by Tara Cicora