Setup Event

Checklist

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

1. SETUP YOUR EVENT: You will need to create your conference event and name it appropriately for your conference (e.g., Fall 2026 Conferences)

2. CREATE AND IMPORT DATA FILES: 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 create these four files and then import them to your pickAtime account. Once you have imported 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 dates, times, and duration of appointments.

4. CONFIGURE SETTINGS:

- **Appointment Settings**: There are several appointment settings that you can modify for the specifics of your event.
- **Configure Notifications (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.
- **Configure Customer User Interface**: When parents log in to schedule their appointments, they will be prompted to identify their children. They will do so by entering in a StudentID and a Security Value. You will need to make sure that your parents are prompted to enter this data in the correct format.

5. TRY IT OUT: Test out your scheduler as a parent would.

STEP ONE: Setup Event

Create Your Event

When you first log in to your account from the pickAtime home page, you will be in the Admin tool and on the **Event Reporting** page.

1. Select the **Events/Preview** button on the pickAdminUI sidebar (left side).
2. Click on the green **Add** button.
3. Enter a name for your event, for example, "Fall 2026 Conferences."
4. Select the type of **PTA**
5. If you have previously used pickAtime, you will then have a pull down where you can select a template from one of your previous events. The template will determine the starting settings (from the UI Setup, Notification Setup, and CUI Messages pages) for your event.
6. Select the event time zone.
7. Optionally, you can add the Date and Location for your event.

You will then see a row listed for your event. The date and location column can be left blank. They are used to differentiate different events when more than one event is available. The date field is simply a label. If your conference has multiple dates, you can list all dates in this column, or you can leave it blank.

For any event, you can also use the Event Details box on the screen to fill in any event-specific information that you may want to use in the display of your scheduler or in your emails for this event. Any text that you add in the Event Details box will be available as a macro field that you can use in your CUI Messages or in your Notification Setup. The macro for the Event Details is $(E_DESCRIPTION).

If you've used the system before and you will be importing new data, you can now delete the previous event(s). To delete an event, click on the Delete button. Doing so after you have created the new event will allow you to use your previous conference event as a template for your new conference event. Please also confirm that your new event is of type PTA.

> If you have multiple dates for your Parent-Teacher Conferences, you do not need to create multiple events. Any event can have any number of dates on it.

Duplicate PTA Option

The Duplicate PTA feature will allow you to create a COPY of a previous event. This is generally only used when you want a new event with the exact same data as a previous event - for example, if you are doing a second set of conferences in the year with no changes to the enrollment data. The

Duplicate PTA option is enabled on a request-only basis. If you would like to use this option, email support@pickatime.com.

STEP TWO: Import Data Files

Data Files

There are 4 required data files for the Parent Teacher Appointments Scheduler: a Student file, a Teacher file, a Classes file, and an Enrollment file. Optionally you can create a Parent File and a Parent Student Relationship File. Generally, the Parent File and the Parent Student Relationship File are only used when you are setting up a Single-Sign On Option.

Student File

This file lists all the students.
The student file must contain the following fields:

- **StudentID** identifies the student
- **First** contains the first name of the student
- **Last** contains the last name of the student
- **SecurityValue** is the value that a parent will enter to identify their child when they first sign up. For example, the SecurityValue could be the student’s birthday, and you would then prompt your parents to enter in a birthday in a predetermined format (e.g. dd/mm/yyyy). The SecurityValue prevents a parent from entering an incorrect StudentID and accidentally selecting the wrong child.

StudentID	**SecurityValue**	**First**	**Last**
4321	04/12/2012	Amanda	Jones
4322	08/04/2012	Timothy	Smith

This table must be provided in a *tab-delimited text* file (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

> Do not recycle StudentID's without first removing existing students. For example, if StudentID 101 last year was assigned to Betsy Smith, and this year StudentID 101 is assigned to William Johnson, the parent of Betsy Smith will log in this year and see student William Johnson listed as her child.

> If you will be recycling student IDs, prior to uploading your new student file, remove all stored contacts. You can do this on the Global Setup / Contacts Setup page under 'remove

> all contacts.'

Key

StudentID is the key field on this file and must be unique.

Other Columns

A column called **Action** can be created in order to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. *The Action column is only needed if you will be deleting data.*

Teacher File

This file lists all the teachers. The teacher file must contain the following fields:

- **TeacherID** identifies the teacher
- **First** contains the first name of the teacher
- **Last** contains the last name of the teacher
- The **email** contains the teacher's email address. Only one email address should be entered here.
- The **room** is where the teacher will be at the parent-teacher conferences. This does not have to be the same room that the class is held in. This field can be helpful for reporting purposes. If you use this field, you can then produce a report by room number.

TeacherID	First	Last	Email	Room
234	Angela	Frank	a@school.com	106
225	Bobby	Smith	b@school.com	Library

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

Key

TeacherID is the key field on this file and must be unique.

Email must also be unique.

IMPORTANT NOTE: If you would like to create team conferences, please see the section on Creating Teams.

Other Optional Columns

Password creates an initial password for your teachers. If you do not import a password when the teacher logs in, they will be prompted to create a password. The password must be at least 6 characters in length.

> Once the teachers have taken ownership of their account and created a password, the import will not change the password. However, on the Global Setup / Contacts Setup page, you can reset the password for all your teachers. This is the reset administrative password button.

Virtual Room is used to import an online meeting link for the teacher if you are having Virtual Conferences or allowing a choice of In-Person or Virtual conferences. It is only used when you are creating your own meeting links for your teachers. If you are using the pickAtime integration for online meetings, the link will be generated automatically.

AccessLevel allows you to set the Admin level for your teachers. An AccessLevel of 3 will provide your teachers with Resource Administrator access, and they will then be able to block their own schedule. The default access level for a teacher is Appointment Viewer.

GroupName allows you to classify a teacher with a GroupName (e.g., Middle School Teacher, Science Teacher). This is useful if you want to create different slots for different groups of teachers. For example, if all your Middle School Teachers needed 15-minute slots and all your High School Teachers needed 20-minute slots, you might set a group name for your teachers and then create slots for the entire group. The Group Name can also be used on the parent scheduling page to display teachers under the Group Name.

A column named **Action** can be created to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. *The Action column is only needed if you will be deleting data.*

Class File

This file defines the classes. The class file must contain the following fields

- **ClassID** identifies the class.
- **TeacherID** identifies the teacher; this field must match the TeacherID listed in the teacher file
- **ClassName** is an optional field and provides a name for the class. This name can be displayed on the CUI legend. For example, if you have multiple sections of Math, each with a different ClassID, you might want to import a field for the Name with the value "Math."

GroupName is an optional field and allows you to categorize your teachers with a Group Name. For example, you might want to categorize some teachers as Upper School teachers and some as Lower School teachers. This will allow you to create different time slots for different groups of teachers easily.

ClassID	TeacherID	ClassName
Math - Sec200	234	Math
Math - Sec201	235	Math

> This table must be provided in a tab-delimited text file (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

Key

ClassID is the key field on this file and must be unique for each teacher. Each **ClassID** should only exist in one row in this file.

Keep in mind that the **ClassID** has to be unique for each teacher. If your database has one "English 9" class with multiple sessions each taught by a different teacher, then you will need a different **ClassID** for each teacher. You can concatenate your database's class identifier with the teacher ID to produce something like "Eng9-869," indicating that this is the English 9 class taught by teacher 869. If you do this, then make sure that the enrollment file has "Eng9-869" in it, not "English 9" or "Eng9".

Other Columns

These columns can optionally be used.

A column called **Action** can be created in order to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. The **Action** column is only needed if you will be deleting data.

PTAN is the number of allowed appointments for each student's parent for that class. For example, some schools allow the parent to have 2 appointments with a home room teacher or an advisor. If the column is not present, 1 is assumed.

Max is the largest number of students that could sign up for the class. This must be larger than the number of students that are in the class. If this column is not present, a very large number is the default.

Enrollment File

This file specifies the classes each student is enrolled in. The enrollment file must contain the following fields

StudentID identifies the student; this must match the **StudentID** listed in the student file

ClassID identifies the class; this must match the **ClassID** listed in the class file

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

The first row should contain the column titles. The column titles must be labeled exactly as listed above.

Notice that none of the column titles has spaces in them.

Your file can be formatted in one of two different ways.

Option # 1

With this option, only one class is listed in the **ClassID** column. If a student has multiple classes you will have multiple rows for each student.

StudentID	**ClassID**
123	English-SecB
123	Science

Option # 2

StudentID	**ClassID**	**ClassID**
123	English-SecB	Science
456	Math	Gym

There is only one row per student. Each class is in a separate column labeled **ClassID**

Other Columns

A column named Action can be created to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. The Action column is only needed if you will be deleting data.

Creating Teams - You can either create teams via the import files or after you have imported your files.

Creating Teams via the Import Process - There are two different ways to accomplish this. The way you select depends on how you will be importing your data, and whether the teachers within a team will also have individual conferences.

Use the first method if you will be importing team data rather than individual teacher data, and your teams will not have any teachers needing to conference on their own. Use the second method if you will be importing individual teacher data, and you would like to combine some of these teachers into teams.

Method 1

Using this option, you will create a new teacher with a team name such as Team Smith-Jones. This team teacher would need to create a class that has all students for teacher Smith and teacher Jones within the class. When the parent logs in, they would see the teacher "Team Smith-Jones" listed. When using a team such as team Smith-Jones, you need to make sure that teacher Smith and teacher Jones are not also available for conferences at the same time as teacher Smith-Jones.

When you import data for teacher Team Smith-Jones, you will need to import a TeacherID. This can simply be a made up teacherID, but it can not be a teacherID that has been imported for another teacher. You can choose to import the email address of one of the two teachers, or leave the email field blank. However, you can not import an email address that has already been imported for another teacher. The email address AND the teacherID must be unique for each teacher. See example below:

Once you have created and imported the data for a team teacher, you can provide the two individual teachers access to the schedule for the team. You would do this by going into the Contacts section of Admin UI. In the upper left hand side, search for the first teacher name (ex. Smith). When you find teacher Smith and have this teacher's information in the right hand side, in the Resource Access section, give teacher Smith access to teacher Team Smith- Jones. Then you would do the same for teacher Jones. If data for teacher Smith or teacher Jones had not been imported individually, you can use the Contacts section of the site to add the two teachers and give them each access to the team.

Method 2

You can create teams by combining two or more teachers. When you import your class file, in the TeacherID column, concatenate your teacher IDs. Below you will see a Teacher File example and a Class File example.

Teacher File

TeacherID	First	Last	Email
T123	Anne	Smith	asmith@school.com
T124	Harold	Rice	hrice@school.com

Class File

TeacherID	ClassID
T123;T124	Math101
T123	Biology

T124	English

In the above example, the school has two teachers, Anne Smith and Harold Rice. These two teachers team teach a class called Math 101. A parent with a student in Math101 will book an appointment with the team, a parent with a student in one of the two individual classes will book with the individual teacher. When a parent of a student in Biology books with teacher Anne Smith, that corresponding slot for the team of Anne Smith and Harold Rice will be blocked off.

The creation of team teachers and team classes can also be used when you would like to allow some parents to book with teachers jointly, and some parents to book with teachers separately. One example might be where you have some students in a class where you would like the special education teacher to also attend conferences. On your class file, you could create a new class labeled English/Special Education and assign the teacherID to the two teachers, the English teacher and the Special Education teacher. Then on the enrollment file, you would assign some students to the English/Special Education class and some to the English class.

Creating Teams after the Import Process

You can also combine teachers into teams after you have imported your four data files. To create a team, you will do the following:

1. Go into **Class Editor**
2. Select **Add Teacher/Team**
3. The **Select Person** dialog box will display
4. 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.
5. Once your team is selected, all team members will be listed in the top-left corner of the Select Person pop-up window - press the **Ok** button.

You would then want to either manually create a class for that team or import a class and corresponding enrollment for that team. Or, if you already have the classes you would like for the team listed under another teacher, you can simply move the classes to the team.

When a parent books with the team, the corresponding time slots for all individual members of the team will become unavailable. Similarly, when a parent books with an individual teacher, the corresponding time slot for the team will become unavailable.

If you would like a room number for your team, you will need to add this on the Appointments page. To the right of your team name, enter a room number.

Parent File (optional file only required for Single Sign On)

This file lists all the parents. The parent file must contain the following fields:

- **ParentID** identifies the parent

- **First** contains the first name of the parent
- **Last** contains the last name of the parent
- The **email** contains the parent's email address. Only one email address should be entered here.

ParentID	First	Last	Email
123	John	Smith	js@parent.com
456	Susie	Smith	ss@parent.com

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

If you do not want your parents to have the option of attaching their student to their account, then turn this option off. This is set on the **Global Setup / Business Setup** page. Under **Miscellaneous**, uncheck the box "*allow parents to attach and detach students*."

The ParentID and the Email address should be unique. If you have multiple rows with the same ParentID, only one contact will be created, as each row will update what was previously imported. If you have multiple rows with the same Email, only one contact will be created, as each row will update what was previously imported.

Parent Student Relationship File (optional and only required for Single Sign On)

This file connects the parents to the students. The parent-student relationship file must contain the following fields:

- **ParentID** identifies the parent
- **StudentID** identifies the student

StudentID	ParentID
37890	4451
37891	4478

> This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited).

Mistakes to Avoid

- Don't export an entire year of class data when you just want half a school year.
- If you use a school management database identifier for the StudentID, and your parents are not familiar with this number, then use a concatenation of the student's first name and last name (ex, "BenFranklin") when you prompt your parents to identify their student.

You do not need to create this concatenated field; simply check the box "Use First + Last Name as StudentID" in the Parent Login section of the Global Setup / Business Setup page. Then, on the label for this field that your parents will see on the Customer User Interface, enter text describing this field to your parents. For example, you can enter the following text for your prompt: "First Name + Last Name, e.g. " "BenjaminFranklin" You would enter this text in the CUI Messages / Student / StudentID label (see CUI Messages page).

- Be careful with leading zeros on numeric IDs. For example, if you use Excel to open a text file that has studentIDs that are all numeric and have leading zeros, the zeros will be stripped off when you save the file.
- If your student IDs have changed from the previous year, you will need to make sure that you remove the previous year's stored student data. See the section on removing contacts on the Previous Users of pickAtime page.
- If your student IDs are simply a number you have assigned to each student, and that number may change each year, make sure you have removed the previous year's stored student data. See the section on removing contacts on the Previous Users of pickAtime page.
- If you have older classes and enrollments, you can now delete the event’s existing classes and enrollments directly from the Import page before uploading new data. This option will also delete the classes’ associated teacher resources, making it easier to remove bad data without leaving the Importer page. To locate this feature on the Imports page, click the Class file option within the File Type drop-down menu.

Make sure you use our naming convention when you are importing Emails. The column should be labeled Email. For example, if you import a column labeled Email_Address, Teachers_Email_Address, or anything labeled other than Email this column will be added but will not be considered the Email to be used for the Teacher or Participant to use as their login Email.

Import Process

Once you have created your 4 import files, you are ready to import these files to your pickAtime account. All 4 files must be tab-delimited text files. Locate the Importer under Main Navigation on the left side.

1. After logging into pickAtime, click Importer.
2. Select Data Type of School.
3. Select your event from the Event pull-down.
4. Set the File Type to students
5. Click Browse and locate your student file on your computer
6. Click on Import

If you have no errors on your import, repeat steps 4 - 6 for your teacher file, your classes file, and your enrollment file, changing the File Type drop-down to the correct type for your file.

For all 4 data files, the data type should be set to School.

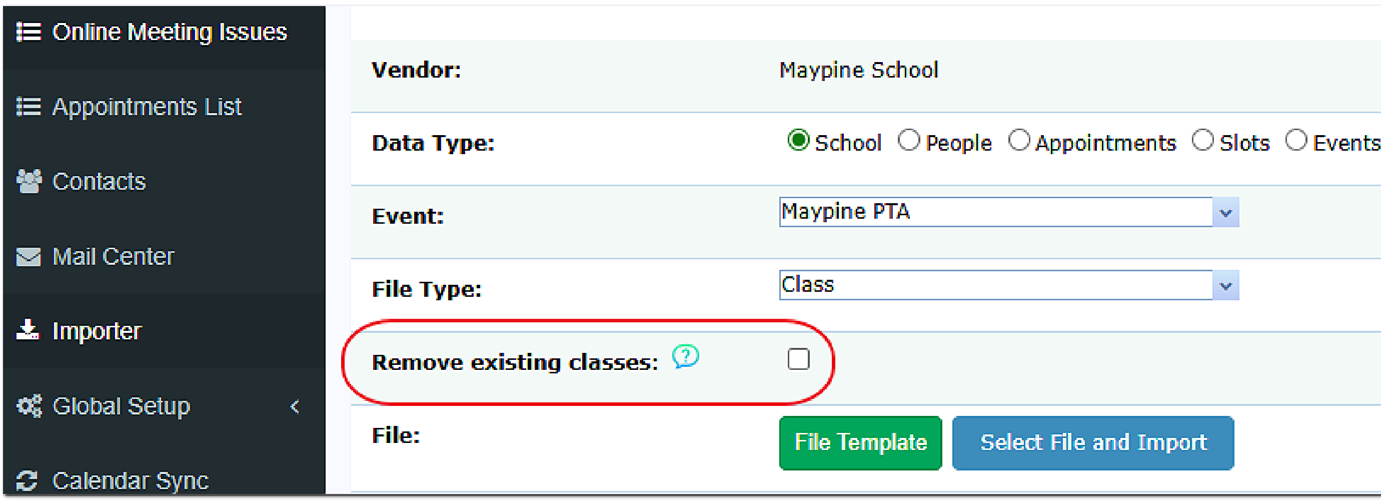
If you have any error messages on the import, read that section in the manual.

Keep in mind that each row in the four tables has a unique identifier, which ensures that if you import the same data more than once no harm will be done. The system does not create new data entries each time the data is imported. It first checks to see if it has the data row you are importing (by matching the key field), then it either updates the existing data or it creates a new record.

If you leave out some data, you can simply import the missing data.

> **IMPORTANT NOTE**: Please be sure that the number of rows imported matches the number of rows on your data file.

- If you receive any errors when importing your teacher file, correct these before importing your class and enrollment files.
- If you receive any errors when importing your class file, correct these before importing your enrollment file.
- You can delete existing resources, classes, and enrollments from the Import page, making it easier to remove bad/old data without navigating away from the Importer page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu.



Error Messages on Import

General Error Messages

Incorrect file type was supplied.
The file must be a tab-delimited text file.
Make sure that you have created and are importing a tab-delimited text file.

Error messages when importing Student File

The file does not have a column labeled "First" or "First Name" and The file does not have a column labeled "StudentID"

Check the labels you have created for each column in your file. They must match exactly our specifications. For example the studentID column needs to be labeled 'StudentID' not something else such as 'Student Lunch Number'.

The ID field is empty for XX

Check the file to confirm that the column has data (first name, last name, studentid, date of birth) within it.

Error message when importing the Teacher file

Found contact with teacherid of ABC and a different contact with the email of betsy@noemail.com

This message indicates that you have a row in your teacher file with teacherID ABC and email address betsy@noemail.com.

However, in the Admin UI, you already have a contact with a teacherID of ABC and a different email address than betsy@noemail.com, AND a contact with the email address of betsy@noemail.com and a different teacherID than ABC.

For example, on your import file, you have this:

TeacherID Email

- ABC betsy@noemail.com

But in the Admin UI, you have two different contacts.

TeacherID Email

- ABC annie@noemail.com
- DEF betsy@noemail.com

You need to correct your data in the Admin UI and then re-import your teacher file. In the Admin UI, search for the contact with that email address that was flagged. If the contact you locate has a different teacherID than on your teacher file, and is an old contact, then delete that contact and re-import your teacher file.

During the teacher file import, we look for a matching teacherID record or a matching email address record. If we find a match on either, we update the rest of the information. For example, if we find a matching teacherID, we update the email address and name of the teacher. If we find a matching email address, we update the teacherID and the name of the teacher. However, if we find two different contact records, one with a matching teacherID and one with a matching email address, we do not know which one should be updated, and we flag this error.

The ID field is empty for XX

Check the file to confirm that the column has data (first name, last name, email) within it.

The password field should be 6 characters or more for XX.

Check the file to confirm that the password column has the correct password data within it.

Error messages when importing the class file

Could not find teacher with teacherID XX

This error message comes up when importing a Class file with a teacherID which is not on the Teacher File. The Classes file will match each class to a teacher. If the teacher was not previously imported into the teacher file, then no match will be found, and the class will not be imported. Take a look at your Teacher file and make sure the TeacherID listed in the error message exists on the Teacher file.

Class 'Math' already exists with a different teacher than '123'

This means that your class file has a row with ClassID: Math and TeacherID: 123. But, Class Math has already been assigned to a different teacher than teacherID 123. The ClassID must be unique for each teacher.

For example, if you have two rows such as:

TeacherID ClassID 123 Math 456 Math

We will flag the second row as an error. The ClassID must be unique for each teacher, otherwise when we import the enrollment file, we do not know which students in class Math have teacher 123 and which students in class Math have teacher 456. You will need to make the ClassID unique by either appending a section number to the ClassID or a teacher identifier to the Class ID. Your enrollment file will also need to be updated to reflect this.

Also note that in the example above, ClassID Math has been added to teacherID 123. Prior to fixing your import files and importing again, you will want to remove ClassID Math. You can remove an individual class by going to the ClassEditor, selecting the 'Show only Classes', locating and then clicking the red X next to the name.

You can delete all of the event's resources, classes, and enrollments from the Import page as well, making it easier to remove the bad/old data without navigating away from the Importer page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu, then click 'Remove existing Classes'.

Error messages when importing the Enrollment file

Student ID not found

This error message comes up when importing an enrollment file that contains a StudentID that does not exist on the Student File.

The enrollment file must be imported after the student, teacher, and class files have been imported. When you import the enrollment file, the student ID needs to find a match to a student in the student file. The error message: Student ID not found means that the Student ID in the enrollment file did not have a corresponding Student ID in the student file.

Example: an error message of Student 12345 not found means that a student with the StudentID of 12345 was NOT imported on your student file.

Class XX not found

This error message indicates that your enrollment file contains a ClassID that was not on the Class File. Take a look at your Class file and make sure that the ClassID listed in the error message exists on the Class file. Note that if you are receiving this error message on classes that you do not care about, and where the teachers will not be conferencing (for example, a Study Hall) then you can ignore these messages - they do not need to be corrected.

Example: an error message of Class Math-101 not found indicates that Class Math-101 was NOT imported into your Class file.

No class ID found for student XX

This message indicates that you have a row with a StudentID that does not contain any ClassIDs.

Student XX not in class YY

This message comes up when you are deleting enrollment, and indicates the student XX was not found in class YY.

Class XX has reached maximum enrollment. Student XX has been skipped.

This indicates that you have set a maximum allowed enrollment for the class and you are importing more rows than the allowed amount. Go into the Class Editor page, click on the teacher and then the class. Check the # you see in the Maximum column and see if this is set correctly.

Error message when importing Parent File

The file does not have a column labeled "First" or "First Name"

Check the labels you have created for each column in your file. They must match our specifications exactly.

Error message when importing Parent Student relationship file

Could not find Parent with ID 'XX' or Student with ID 'YY' as this parent/ student was not imported

This error message indicates that either the ParentID as listed on your parent-student relationship file was not found or the StudentID as listed on your parent-student relationship file was not found. Refer back to your Student file or your Parent file to make sure the parent and the student were imported.

How to Correct Bad Data

STUDENT FILE

My students names were reversed

Simply correct your file and re-import.

My student ID's were incorrect

Take your incorrect file, add a new column labeled Action, and fill this with the word Delete. Then re-import this file. This will remove all your incorrectly imported students.

I forgot the SecurityValue field

Simply add the field to your file and re-import.

My file was missing some students

Import your student file again with the newly included students. Then also import your enrollment file to add in the enrollment for these students.

TEACHER FILE

For teacher file import issues, how you resolve these depends on whether you have already imported your class file. Once the class file has been imported your teachers are turned into a "resource" on the Appointments page and can not simply be updated with a new teacher file import. See the two different sections below.

WHEN YOU HAVE NOT IMPORTED YOUR CLASS FILE

My teacher names were reversed

Simply correct your file and re-import.

My teacher file was not correct, and I have not yet imported my class file

Take your incorrect teacher file, add a new column labeled Action, and fill this with the Delete. Then re- import this file. This will remove all your incorrectly imported teachers.

My teacher IDs are incorrect, and I have not yet imported my class file

Take your teacher file (with the incorrect teacher ID's) add in a column labeled Action, and fill this column with the word Delete. Then import this file to remove the incorrect teachers.

WHEN YOU HAVE ALREADY IMPORTED YOUR CLASS FILE

My teachers are not correct, and I have imported my class file

When your class file is imported, your teachers get placed on the Appointments page and on the Class Editor page.
If you have some teachers that you do not want, then you can go to the Class Editor page and remove teachers who are not participating in the conferences.

My teachers are assigned to the wrong classes? (see also below on the Class File import)

Go into the Class Editor and remove all your classes. Then import your class file again.

CLASS FILE

I imported the wrong classes? I imported too many classes?

Go into the Class Editor and delete all your classes or the classes you do not want.

You can remove an individual class by going to the ClassEditor, selecting the 'Show only Classes', locating and then clicking the red X next to the name, or you can select all of them and then delete.

You can also delete all of the event's resources, classes, and enrollments from the Import page, making it easier to remove the bad/old data without navigating away from the Importer page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu, then click 'Remove existing Classes'.

On my class import, I received this message, “Class A already exists but with a different teacher than Teacher B.”

This means that on your class file you have Class A listed in two different rows and belonging to two different teachers. The ClassID must be unique for each teacher. Take a look at the Class file and determine which is the correct teacher for Class A. If your 2nd reference is incorrect, then correct that row and re-import. If your first row was incorrect, then go into the Class Editor, click on the incorrect teacher for the class, and then click on the class. You can either delete the class or move the class to the correct teacher.

My classes are assigned to the wrong teachers.

Go into the Class Editor and remove all your classes. Then import your class file again.

You can remove an individual class by going to the ClassEditor, selecting the 'Show only Classes', locating and then clicking the red X next to the name, or you can select all of them and then delete.

You can also delete all of the event's resources, classes, and enrollments from the Import page, making it easier to remove the bad/old data without navigating away from the Importer page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu, then click 'Remove existing Classes'.

One class I imported was assigned to the wrong teacher.

The simplest solution is to go into the Class Editor and move the class from the incorrect teacher to the correct teacher. If you simply change your class file, you will be adding the correct class to the correct teacher, but the incorrect class - teacher assignment will not get removed.

I missed some classes.

Simply add to your class file and import again, or import a file with the missing classes.

ENROLLMENT FILE

I imported the wrong enrollment
I imported last year’s enrollment data

Delete all your classes by going to the Class Editor. Then import your class file and a corrected enrollment file. My enrollment file did not include all enrollment Simply import your enrollment file, with the newly included enrollment data

HOW TO REMOVE IMPORTED DATA

To remove everything:

1. On the Events List page, create a new event and select the Add button using your last event as a template. Then delete the old event. This will delete your class and enrollment data.

2. Then delete the stored contacts on the account. These are the parent and teacher contacts, as they are on the account, not just the event. This is done by going into the Global Setup / Contacts page, selecting the Show advanced options... and clicking on the Remove all customers button. Select the level to delete of Event Administrator. Note that this will also remove parents.

3. To remove the student contacts, select the Remove students not enrolled in a class button. This may take a few minutes. You will have an empty event, and you can start over.

If your students and teachers are correct, and it is only the Class and Enrollment data that is not, you can simply do item 1 and not item 2.

To remove class data, but to keep the slots you have created for your teachers:

1. Go into the Class Viewer and delete all the classes. This will keep your teacher roster on the Appointments page and on the Class Editor page.
2. You will then need to import a new class file and a new enrollment file.

To remove student, teacher, class, and enrollment data, but not your parents:

1. On the Events List page, create a new event (select the Add button) using your last event as a template. Then delete the old event. This will delete your class and enrollment data.

2. Take your incorrect or recently imported student and teacher files, add a new column to them labeled Action. Fill this column with the word DELETE and re-import both files.

Frequently Asked Questions on School Data

We mistakenly imported the previous semester's data, but we have too many parent appointments to start over. Can we import new files?

You can import new data files. However, this will simply add to the existing data. For example, if your class and enrollment file now contain different classes, any new classes will be imported, but classes that were previously imported will not be deleted. To delete classes, you will need to do so in the Class Editor, or create a new data file listing your classes to delete and using the Action column filled with the word delete.

Note that a new import will not remove any parent appointments.

We re-imported our class and enrollment files as we needed to delete some classes. We don't see the changes in the Class Editor.

A new import will simply add to or update existing data. If you have classes to delete, you will need to delete them from the Class Editor page or by using the Action column in the Class File import. To delete via an import, you would add a column labeled Action and filled with the word Delete in the row for a class that you would like to delete.

To remove select enrollments, take your incorrect enrollment file, and add a column to it labeled Action. Fill this column with the word delete and then reimport the file. This will remove any matching enrollment records.

We realized that we were missing some class and enrollment data. Can we import a new class and enrollment file? Will this delete any parent appointments that have been booked?

You can import new data files. This will add any new class and enrollment data. It will not delete or disturb parent appointments that have already been booked.

View Your Data

Once you have imported your data, you should go to the Class Editor page to confirm that your data is correct.

1. From the Admin UI on the Events Preview page, select your event from the list and click on the button.
2. Select the Class Editor tab. This tab will display your list of teachers. If you select a teacher's name from the left-hand side, then you will see the list of classes for the teacher. See the Modifying Teacher or Room Data section of the manual to add or remove teachers. Clicking on a class will bring up the list of students in that class.

- If you would like to view the data in class order, check the box on the far right-hand side "show only classes." See the Moving a Class section to move a class and see the Modifying Enrollment Data section to add or remove students from classes.

Missing 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.

Missing Enrollment

If you have not made any manual changes to the enrollment within the Admin UI, you can simply import an updated enrollment file.

Any subsequent imports of your class and enrollment files will not change previously imported class and enrollment data. It will simply ADD IN new data that is on the class or enrollment file.

STEP THREE: Create Time Slots

Creating Slots

To get started, go to **Events > Preview**, select your event, then click the Appointments tab. From the left-hand calendar, select the date you want to work with. Then open the Slots drop-down and choose Create Slots.

Step 1: Choose which teachers to create slots for

In the slot generator, choose whether to create slots for selected teachers or all teachers/resources. To select multiple teachers, hold Ctrl while clicking names in the right-hand panel.

Step 2: Set your time and duration

Field	Description
From	Start time of the first slot
To	End time of the last slot
Duration	Length of each appointment (in minutes)
Travel Break	Optional gap between appointments

> Example: 10-minute slots with a 5-minute travel break create slots at 8:00–8:10, 8:15–8:25, 8:30–8:40, and so on.

> Note: If you need a break that doesn't align with your slot duration (e.g., 20-minute slots but a 40-minute lunch break), create slots in two batches — one before the break and one after.

Step 3: Choose appointment type

Type	Description	Indicator
In-Person	Parents receive room/location info	P
Virtual	Parents receive a meeting link	V
In-Person or Virtual	Parents choose their preferred format	PV

Step 4: Set slot visibility

Option	What it does
Visible for Customer	Available for online booking
Hidden from Customer	Hidden from parents; visible in Admin UI only
Shown with "Call" Status	Visible to parents, but they're prompted to call the school to book
Make Unavailable	Visible in Admin UI but not bookable online (use for lunch breaks, meetings, etc.)

You can optionally add a custom message for unavailable slots.

Step 5: Set maximum appointments per slot (optional)

Use this for group sessions, open labs, or any scenario where multiple families can book the same time slot.

Creating Slots for Multiple Days or Teachers

Same schedule across multiple days: Enable the Multiple Dates option and select all applicable dates before saving.

Different schedule per day: Create slots for the first day, then switch to the next date on the calendar and repeat.

Different schedules per teacher: Select a teacher (or group of teachers), create their slots, save, then repeat for the next teacher or group.

> Tip: If you created identical slots for all teachers at once, individual slots won't display until you click a specific teacher's name in the right-hand panel.

Updating Existing Slots

Use Update Slots to change the characteristics of existing slots without deleting and recreating them. To access it, go to the Appointments tab, select a date and teacher, then choose **Slots > Update Slots** from the drop-down.

You can update:

- Appointment type (e.g., switch from in-person to virtual)
- Maximum appointments per slot
- Slot visibility (hidden, unavailable, etc.)

> Important: Update Slots does not change start times, end times, or appointment duration. To change those, you must delete and recreate the slots.

> The "Keep existing slot type on slots being updated" checkbox is useful when teachers have already blocked parts of their schedules — it lets you change appointment type without affecting slot type.

Blocking Slots

Blocking is the preferred way to temporarily remove availability without permanently deleting a slot.

To block a slot, go to the Appointments page and click the X in the corner of the slot. It will turn red and display "Blocked." You can enter a custom message (e.g., "Lunch Break" or "Staff Meeting"). To unblock it, click the X again to restore it to available.

> Blocked slots appear on reports when the Show All Slots option is enabled.

Deleting Slots

Use Delete Time Slots when you need to permanently remove slots. To access it, go to the Appointments tab, select a date and teacher, then choose Slots > Delete Time Slots.

If appointments already exist on those slots, a second dialog will appear with these options:

- Move appointments to the red Appointments List (a holding area where you can manually rebook or cancel them)
- Cancel appointments without sending a notification
- Cancel appointments and send a cancellation email

> Tip: Review whether parents need a cancellation notification before confirming any deletion.

Moving Slots

Use Move Slots to transfer an entire day's slots — and any existing appointments — to a new date. This is useful for school closures, rescheduled conference days, or teacher availability changes.

To access it, go to the Appointments tab, select a date and teacher, then choose Slots > Move Slots. In the dialog, select the destination date, choose whether to move slots for all teachers or selected teachers, and confirm.

Existing appointments transfer to the new date with all parent information intact. Appointment times remain the same.

> Important: Calendar notification emails are not sent automatically. Advise parents to update any calendar entries they've saved.

You can send a custom notification email to affected parents explaining the change.

Copying Slots

Use Copy Slots to duplicate a day's slot structure to another date or teacher — without copying existing appointments.

This is helpful when multiple days share the same schedule, or when you want to quickly replicate one teacher's setup for another.

To access it, go to the Appointments tab, select a date and teacher, then choose Slots > Copy Slots. Select the destination date and/or teacher(s) and confirm.

Slot visibility, appointment type, and availability settings are all preserved. If you also need appointments to transfer, use Move Slots instead.

Changing Slot Duration or Times

You cannot modify slot start times, end times, or duration in place. To change any of these, you must:

1. Delete the slots you want to change (or all slots for that day)
2. Recreate them with the correct settings

Example: If you have 10-minute slots from 8:00 AM–2:00 PM but want 9:00 AM–1:00 PM instead, delete the 8:00–9:00 AM and 1:00–2:00 PM slots (or delete all and start fresh), then create the new schedule.

Quick Reference: Which Tool to Use?

Situation	Use
Temporarily remove availability	Block Slots
Permanently remove slots	Delete Time Slots
Change appointment type or visibility	Update Slots
Reschedule an entire day	Move Slots

Duplicate a schedule to another day or teacher	Copy Slots
Change slot duration or times	Delete + Recreate

Slot Color Guide

Color	**Meaning**
Blue	Available
Red	Blocked
Grey	Teacher is booked elsewhere (team meeting or personal appointment)
Yellow	Time has passed

FAQ on Creating 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 holder whose appointment was moved.

My slots are 20 minutes in duration, but I wanted a 30-minute break for lunch

If your break will not have the same duration as your slots or is not a multiple of your slots (e.g. you have time slots of 20 minutes, and you want a 40-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 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 the grey time slot, a message will display telling you where the teacher is booked.

Why are my time slots yellow?

Yellow indicates that the time has passed.

I created time slots with the wrong duration, but my parents 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 rebook their appointment. Or you can put the appointments "on hold" and then cancel and manually rebook 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 cancel and rebook.

STEP FOUR: Adjust Settings

UI Setup

Event Settings

On the UI Setup (Events Management, Settings/UI Setup) page, you can adjust various settings specific to your event.

1. From the Admin UI on the Events/Preview page, select your event. Click on the Go To Event button to open the Event Management page.
2. Select the Settings tab and then the UI Setup tab.

From the top of the page, work your way down

Scheduler Availability

- Open the scheduler for customers. Enter the date and time that you would like the scheduler to open for your parents.
- Close the scheduler to customers. Enter the date and time that you would like the scheduler to close for your parents.
- Check the box *allow Admins access* to the CUI at all times to allow Administrators access to the parent scheduling page when the scheduler is not open to your parents. When this box is checked, when you log into the Online Scheduler, you will see a page that says that the event is closed to parents but not to admins.

Appointment Number Limits

- **Maximum Appointments per Event**. - This allows you to limit the number of allowed appointments per event.
- **Maximum Appointments Per Resource per Day**. - Allows you to set a limit on how many appointments per resource can be booked on any day. For example, you can create 15 slots on a day, but set this to 10. As soon as the 10th appointment is booked at any time on that day, no more appointments can be booked.
- **Maximum Appointments Per Child**. - This allows you to set a limit on the number of appointments per child that the parent can book.
- **One appointment per teacher per student (regardless of the number of classes that have that teacher)** - If this box is checked, then the parent will only be able to schedule one appointment with the same teacher, even if their student has more than one class with that teacher.

- **One appointment per class (regardless of the number of students enrolled in the class) -** If this box is checked, then the parent will only be able to schedule one appointment for the same class, even if they have multiple students enrolled in the same class.
- **Allow back-to-back -** If the "allow back-to-back" is not checked, the system will not allow a parent to make an appointment immediately following their previous appointment unless the two appointments are with the same teacher. This setting is used to prevent parents from making appointments with two teachers one after the other, so that parents will have time to travel from one appointment to the next. The system allows back-to-back appointments when the two appointments are with the same teacher, regardless of this setting. It will also allow back-to-back appointments when travel breaks have been added.

Appointment Cancellations

- Customer cannot cancel their appointment closer than x hours/days/weeks If you want to prevent participants from canceling their appointment within some amount of time before the appointment, alter this setting. Set this to 0 if you don't care if participants cancel a minute before they show up. Set this to a large value if you don't want them to be able to cancel the appointment. **NOTE**: closing your scheduler does not prevent participants from canceling an appointment.

Close Appointment Booking

- **Close Appointment Booking** allows you to make slots unavailable some amount of time before the appointment. There are 3 options.

1. Close appointment booking at XX time XX days before the appointment date.
2. Close appointment booking XX hours/days/weeks/months before the appointment time.
3. Close appointment booking XX hours before the first appointment time of the day.

Scheduler Settings

Scheduling Link

The Scheduling link for the selected event lists the site address for the selected event that you can either use on your school web page or provide to participants in an email to use when booking an appointment. If you click on this link, a new browser window will open up that is the Customer User Interface (CUI) for your event. You can also enter a customized event name. This will then be appended to your account URL. For example, if you have customized your event URL to https://pickatime.com/HowardSchool, your custom event URL might look something like this:

https://pickatime.com/HowardSchool/LS or https://pickatime.com/HowardSchool/US. Note that when using the custom event URL's, the participant will still have the option to toggle to any other open event on the account.

IMPORTANT NOTE: The event URL you see listed on this page 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 customer, 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.

The Scheduling link for the category would display a scheduler for the event(s) that fall in the category.

Scheduler Display

- **Display in a Condensed/Expanded mode -** pickAtime offers both **Condensed** and **Expanded** scheduler views, so users can choose the experience that works best for their scheduling style and screen space.
    - **Condensed View -** Best for users who want to see more availability with less scrolling. The Condensed view uses variable time steps, creating a cleaner and more compact layout. This option is helpful for smaller screens or users who want to quickly browse open times without focusing on exact interval spacing.
    - **Expanded View -** Best for users who prefer a traditional scheduling layout with fixed time increments. Expanded view displays fixed time slots in consistent intervals, making it easier to visually search for appointments of a specific length or compare gaps between appointments. This view closely matches the classic scheduler experience and can be preferred by long-time users familiar with the original CUI.

  Users can switch between views at any time using the toggle button located in the top-left corner of the scheduler.
- Display multiple dates with a **Paginator** or a **Calendar**. The **Paginator** option will allow the parent to see multiple dates on the same page. The **Calendar** option will display one day at a time to the parent, with a small calendar displayed where the parent can select a different date.

Scheduler Display Limits

- **Display X weeks of slots xxx slots on the scheduling page.** This setting determines how many days or weeks are shown on the Customer User Interface at one time. This only applies if Paginator was selected under the Scheduler Display.

Teacher Display

- **Display resource description**. If you have added a description to the Resource Name, then it will be displayed on the parent scheduling page. This displays when the small info icon above the teacher's name is clicked.
- **Display rooms** will show the room on the parent scheduling page.
- **Separate legend for each child (Regular PTA only)**. Allows you to have the option of a separate legend per child.
- **Display class names**. If you have added Class Names to the Appointments page, then checking this box will show the class names on the parent scheduling page. This displays

when the small info icon above the teacher's name is clicked.

Teacher's Group Name

- **Sort by Group Name** -This section allows you to group your teachers. For example, you might want to group all your Lower School teachers together, and then have a grouping for Middle or Upper School teachers. Enter your group names in this section, then go to the **Appointments** page on the right hand side you can see the list of teachers, there is the Group Name column you can select a category from the drop-down, so would assign each teacher to a Group.

Advanced Settings

Online Meeting Provider

- **Use 'X' for online meetings** - Select from the drop-down menu which Online Meeting Provider you want to use for this event.

Multiple Appointment Booking

- **Allow a parent to make conflicting appointments for themselves -** If this box is checked, the parent will be able to make more than one appointment at the same time.

Appointment Changes

- **Allow customers to see and cancel past appointments** - Check this box to allow your customers to see and cancel past appointments

- **Don't allow customers to change appointment time** - Check this if you do not want the participant to have the option to change the time of their appointment.

Notification Setup

The Notification tab in the Settings section allows you to toggle between the following options: **Confirmation Email / Cancellation Email / Reminder Email /Custom Email / Follow-up Email / Resource Notification Email / Calendar Event Notification.**

Confirmation Email

Subject - Allows you to change the text in the subject line of the email.

Header - Allows you to change the text in the header line of the email.

Body - Allows you to change the text in the body of the email.

Send Confirmation and Cancellation Emails - Check this box if you would like a confirmation email sent after the appointment is made. This is generally left unchecked for schools.

Support Email - Enter an email address in this box, and you will receive a reply when your customer selects "reply" in the confirmation, reminder, or cancellation emails. If you leave this blank, any replies will receive an automated email response directing them to contact the scheduling organization.

Replace the Email Body with the Printable Schedule - the recommended option is to check this box. Then your parent will receive an email with a table of their appointment schedule, instead of an individual email for each appointment.

Reminder Emails

Send Reminder Emails

Select Add and enter the time (in hours) prior to the appointment for which you would like an email reminder to be sent. You can add multiple times. The duplicated values are not allowed and will be removed automatically.

There are two ways reminder emails are sent:

- If the **'Replace the Email Body with the Printable Schedule of Appointments'** option is turned on, all your appointments will be grouped into one reminder email, sent a set number of hours before your first scheduled appointment. If you have appointments on multiple days, you will get a reminder email each day, listing all your upcoming appointments. For example, if reminders are set for 24 hours and 12 hours before the appointment time, you'll get two reminder emails, 24 and 12 hours before your first scheduled appointment.
- If the **'Replace the Email Body with the Printable Schedule of Appointments'** option is turned off, you will get one reminder email for all appointments booked within the same hour. For example, if you have appointments at 9:00 AM, 9:15 AM, and 9:30 AM, they will be grouped into one reminder email. If you book more appointments at 10:15 AM and 10:30 AM, you will get two separate reminder emails: one for the 9:00 AM, 9:15 AM, and 9:30 AM appointments, and another for the 10:15 AM and 10:30 AM appointments.

Footer - Allows you to change the text in the footer of the email.

Subject for combined email - When a combination email will be sent, for example, when an appointment is canceled and immediately rescheduled, the text here will be in the subject line of the combined email.

Recommended Option.

On the Confirmation and Reminder emails, you have the option to insert the printable schedule or appointments as the body of the email. The printable schedule or appointments is a table that summarizes all the appointments a parent has booked. To include this option, check the box

"Replace the Email Body with the Printable Schedule or Appointments" box. When you check this box, your email will contain the Header text, the printable schedule, and the Footer text. See the CUI Messages / Print Schedule section for the formatting of the printable schedule.

The format of the table of appointments that is included is referred to as the printable schedule, as this table will be the same as the table a parent would see if they clicked on the Printable Schedule link on the parent scheduling page. The information included in this table is set on the Settings /CUI Messages page under the Print Schedule section.

When the "printable schedule or appointments" option is selected, one email will be sent containing the schedule of appointments made by the parent. The parent will not receive one email per appointment booked.

Configure CUI

The pickAtime system allows you to customize many of the display settings that your parents will see when booking appointments.

To modify the **CUI messages**:

- From the **Admin UI**, select the **Events / Preview** option on the dashboard. Then select your event from the list and click on the **Go To Event** button.
- Select the **Settings** tab and then the **CUI messages** tab.
- On the left-hand side, you see many different labels that you can optionally modify. When you select a label, the right-hand side will display the text that will show up on the CUI. The text on any of these labels can be changed.
- To edit the title on the login page for your scheduler, select **Sign In page / Welcome message*** and edit the text on the right-hand side.
- 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.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

STEP FIVE: Try it Out

STEP FIVE: Try it Out

1. From the **Admin UI** on the **Events / Preview** page, select your event. Click on the **Go To Event** button to open the **Event Management** page.

2. Select the **Settings** tab and then the **UI Setup** tab.

3. To turn on the online scheduler so parents can use the website and schedule appointments, modify the “**Open scheduler to customers on**” and the “**Close scheduler to customers on**”. Any days that you want to make available for parents to schedule appointments should be within the start and end date specified.

To allow yourself (and other Administrators) access to the scheduler when it is closed to your parents, check the box "*allow Admins access to the CUI at all times*".

Finalsite Single Sign On Schools

Follow the link as directed to you by Finalsite in viewing the scheduler.

All other Schools

View for yourself the appointment booking web page. The appointment URL is listed in the Account URL section at the bottom of the **Global Setup / Business Setup** page. To test out the system, you can click on the URL or copy and paste this URL into another browser window and try out the site as if you were a customer. You can customize this URL by checking the box "Set custom URL" and entering in your preferred URL name in the white box.

The "**Appointment URL**" will change to reflect your selection, and the new URL will be available in approximately 5-10 minutes.

You can confirm the appointment procedure by adding a student to your account and booking an appointment. To add a student to your account, you would need to enter the **StudentID** and **SecurityValue**. You will then see the list of all available appointment slots for that student. If you want to remove yourself as the child's parent, you can do so by clicking the X next to the student's name on the CUI. You can attach any student to your account; it will not prevent the “real” parent from doing so as well.

IMPORTANT NOTE: If you have checked the box "*Use First + Last Name as StudentID*" in the **Parent Login** section of the **Global Setup / Business Setup** page, then be sure you are entering the student's first name + last name as the first prompt.

If you receive an error message "*Failed to find student*", check the values that you have entered in the CUI with the values for that student that are in the Contacts section of the Admin UI.

If you don't see the student's teachers listed, several things could be wrong. Check the student's enrollment information and make sure you have slots for the teachers at the PTA event.

Additional Checks

Is the URL that I've provided to my parents correct?

You can confirm your link by going to the Global Setup / Business Setup page of the Admin UI. Under the " Setting Appointment URL for customers, you will see the unique scheduling link for your school. Here you also have the option to customize your link.

Is my slot duration correct?

The duration of your time slots can not be changed. If your slot duration is incorrect, you need to delete the incorrect slots and create slots with the correct duration.

For example, if your parents start booking appointments every 15 minutes, and you then discover that you need 10-minute slots, you will need to delete the 15-minute slots and cancel the appointments. Then you will be able to create slots with a duration of 10 minutes.

How do I test the scheduler and follow the directions on "adopting" a student?

Click on your scheduling link and add any student at the school to your account. This will not prevent the "real" parent from booking appointments.