

# 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.

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