Simple PTA Management Guide

Administrator Access

Updating an Existing Contact's Access

1. Go to the Contacts tab and search for the contact.
2. Select their name.
3. Adjust the **Admin Level** pull-down to set their access.

This allows the contact to log into the Admin UI and view reports, with permissions determined by the level selected (see table below).

Adding a New Administrator

1. Click the green **Add** button.
2. Select **Admin...**.
3. Fill in the contact's information.
4. Set their **Admin Level** using the pull-down.

The new contact will be prompted to create a password the first time they log in.

Admin Access Levels

Level	Permissions
Appointment Viewer	Can log in and view appointments only — no changes allowed
Appointment Maker	Can make appointments from the Admin UI, but cannot change setup or add/remove slots
Resource Administrator	Can make/cancel appointments and add/remove slots — limited to the specific resources granted in **Resource Access**
Event Administrator	Full administrative access to one or more specific **events** — set under **Event Access**
Administrator	Full access to the entire account

> All levels include access to reports.

Granting Specific Access

Some levels require you to specify *what* the contact can access:

- **Appointment Viewer, Appointment Maker, Resource Administrator:** Set their accessible resources under **Vendor Access / Resource Access**.
- **Event Administrator:** Set their accessible event(s) under **Vendor Access / Event Access**.

Updating Multiple Teachers/Admins at Once

To bulk-update access levels for a group of contacts:

1. Go to **Global Setup / Contacts**.
2. Under **Advanced Options**, click **Modify Admin Level**.

Allow Teachers to Block Slots

Why upgrade teacher access?

By default, teachers have **Appointment Viewer** access only — they can view their schedule but not make changes.

Upgrading teachers to **Appointment Maker** access allows them to **block their own slots** before the scheduler opens to parents. This is useful when an admin has bulk-created slots for all teachers, and each teacher needs to block off specific times (e.g., for breaks or unavailability).

How to upgrade teacher access

1. Go to **Global Setup / Contacts**.
2. Click **Show Advanced Options**.
3. Click **Modify Access Level**.
4. Change the access level from **Appointment Viewer** to **Appointment Maker** for your teachers.

Each teacher will now have access to manage their own schedule.

How teachers block/unblock slots

1. Log into the Admin UI — teachers will land directly on the **Reports** section.
2. Click **Block Schedule** at the top of the page to go to the **Appointments** page, showing their available time slots.
3. To **block** a slot, click the **X** in that slot's cell — it will turn **red**.
4. To **unblock** a slot, click the **X** again — it will turn back to **blue**, indicating it's available.

Allow Teachers to Pre-Book Appointments

Why upgrade teacher access?

By default, teachers have **Appointment Viewer** access only — they can view their schedule but not make changes.

Upgrading teachers to **Appointment Maker** access allows them to **book appointments on behalf of parents**, before the scheduler opens to parents.

How to upgrade teacher access

1. Go to **Global Setup / Contacts**.
2. Click **Show Advanced Options**.
3. Click **Modify Access Level**.
4. Change the access level from **Appointment Viewer** to **Appointment Maker** for your teachers.

Each teacher will now have access to manage their own schedule.

Contacts

The **Contacts** tab is where your full list of teachers, administrators, and parents is stored. Parent contact records are created automatically the first time they log into the online scheduler.

To get started: From the Admin UI, select **Contacts** on the left-hand side dashboard.

Viewing Contact Info

Search for and select a contact to populate their details on the right-hand side. Several tabs are available:

Tab	What it shows
Contact Info	Email, first/last name, admin level, customer access rights, and any custom fields configured under **Global Setup / Contacts**
Appointments *(small tab, distinct from the main Appointments tab)*	All appointments for this contact. For students, this shows enrolled classes.
Log	Email history and a log of when appointments were booked or canceled
Vendor Access	Resource Access and Event Access settings for administrators

Search options: The Search Control list allows you to search by **Last Name**, **First Name**, **Email**, or any custom ID fields configured under **Contacts**.

Other actions available from a selected contact:

- **Delete** — removes the contact
- **Reset PW** — resets the contact's password to your account's default password (configurable under **Global Setup / Contacts**)

Setting Up Vendor Access

> **Important:** When adding a new contact with **Appointment Viewer**, **Appointment Maker**, or **Resource Administrator** access, be sure to check the appropriate box under **Vendor Access / Resource Access** — otherwise

> they won't have access to any resources.

Master Access: The **"Allow access to all events and all resources"** option under **Master Access** is only available for **Appointment Viewer** and **Appointment Maker** levels. It is **not** available for **Resource Administrator** or **Event Administrator** levels, which require resources/events to be granted individually.

Adding a New Contact

1. Click **Add**.
2. Select a contact type from the drop-down:
   - **Admin**
   - **Teacher**
   - **Parent**
   - **Other**
3. Fill in the fields marked `<not entered>` on the form — fields vary depending on the contact type selected.

> The form will not allow you to create a new contact record with the email address that already exists on the vendor account.

Directions for Parents

Follow the link provided by your school to access the Scheduler, then follow the steps below.

Step 1: Sign In

- **Enter your email** and click **Next**.
- **Returning users:** If your email is recognized, enter your password.
- **New users:** If your email isn't registered, follow the prompts to **Sign Up**.

Step 2: Select Teachers

By default, all of your student's teachers will appear.

- **To select a teacher:** Check the box next to their name — or click the **three dots (⋮)** and choose **Select All** to select everyone at once.
- **When ready:** Click **Filter Slots**.

Step 3: Book Appointments

The scheduling grid displays available times as squares with a **plus sign (+)**.

1. Click your preferred time square.
2. Enter the **student's name** or any other information your school requires.
3. Click **Create Appointment**.
4. A confirmation message will briefly appear at the top of the screen.
5. Repeat for each teacher you'd like to visit.

Managing Your Schedule

View or Print Your Schedule

Click **Printable Schedule** in the left-hand sidebar to see your full itinerary.

Changes & Cancellations

On a computer:

1. Click **My Appointments** in the left-hand sidebar.
2. Locate the appointment you'd like to change.
3. Hover over the appointment to reveal **Details**, **Edit**, and **Cancel** options.

On a mobile phone:

1. Tap the **menu icon** (☰) in the top-left corner.
2. Select **My Appointments**.
3. Tap the **three dots (⋮)** next to an appointment to modify or cancel it.

Important Notes

- For questions or technical assistance, please call the school office.

Modifying Teacher or Room Data

Teachers

Once the teacher has been imported into the system the teacher’s names will appear in the contacts and also in the resource listing on the **Appointments** page.

Change the spelling of a teacher's name

1. From the Admin UI, open the event.
2. On the right-hand side in the list of teachers select the teacher that you want to change, select the **Teachers** drop-down and then the **Assign Contact** option. A dialog box called Select person will pop up that is very similar to the Contacts page.
3. On the Select person dialog box click on the 'Show Full Dialog' button.
4. Search for the teacher on the left-hand side, when his/her information displays on the right-hand side, correct the name and then press **Ok**.

Rooms

To display the **Room** column on the event scheduler, follow these steps:

1. Navigate to the **Admin UI** and open the specific event.
2. Go to the **Settings / Online Scheduler Settings** tab.
3. Under **Scheduler Settings**, locate the **Teacher Display** section.
4. Enable the **Display Room** checkbox.

To update a room number, follow these steps:

1. Select the **Appointments** tab.
2. Locate the room listed next to the teacher's name.
3. **Double-click** the room number to edit it directly.

Passwords

Resetting Passwords for Individual Contacts

1. Navigate to the **Contacts** page of the Admin UI.
2. Search for the contact by name and select them in the search result.
3. Click the **Reset PW** button under the Search console.
4. The password will revert to the system default.

> **Note:** The default password is found and managed on the **Global Setup / Contacts** page, **Advanced Options** section.

Resetting Passwords for All Teachers

To perform a bulk password reset for your teaching staff:

1. Navigate to the **Global Setup / Contacts** page.
2. Scroll to the bottom and click the **Reset PW** button.
3. When prompted for an **Administrative Level**, select **Appointment Viewer** from the dropdown menu.
4. Confirm the action to reset all passwords to the current default password listed on this page.

Problem Appointments

The Appointments List page shows a master list of all appointments, including any that need attention.

Red Appointments — Rule Violations

What they are: Previously booked appointments that violate a rule configured under **Settings → Online Scheduler Settings**.

How they're created:

- An admin manually books an appointment that breaks a configured rule (e.g., booking limits, one-appointment-per-teacher rules).

To resolve:

1. Click the red appointment to see the reason for the conflict, shown below the calendar.
2. Open the **Appointments** drop-down and select **Confirm Appointment** to force the booking and clear the flag.

> ⚠ **Important:** Red appointments are invisible to parents — they do not appear as booked on the parent's schedule, and reminder emails will **not** be sent until the appointment is confirmed. Always check the Appointments List for unresolved red appointments.

Orange Appointments — In Progress

What they are: Appointments currently being booked by a parent, mid-process.

Behavior:

- Cannot be manually deleted or selected for email notifications.
- Automatically managed by the system — if the parent is inactive for too long without completing the booking, the appointment is automatically canceled.
- The orange status disappears once the parent clicks **Create Appointment** to finish booking.

> This status is useful for admins booking appointments manually: it prevents you from accidentally selecting a time slot a parent is currently in the process of booking.

Deleted Slots with Existing Appointments

When you delete a slot that has appointments booked on it, those appointments are **not deleted** — they're **flagged** instead, and will appear in the **Appointments List** for review.

Reports

When you log into pickAtime, you'll land on the **Event Reports** page by default. Reports fall into two categories: **Event-Specific** and **Account-Specific**.

Event-Specific Reports

Select your event from the **Event** pull-down. If your event's dates have already passed, enter a **From/To** date range to pull historical data — otherwise, this is optional.

Report	What it shows
Teachers' Schedule	Appointment schedule per teacher. Supports filtering by teacher, plus "Show All Slots" to see every slot (booked or not). Can be emailed to all teachers or one individual.
Teachers' Appts	Number of appointments scheduled per teacher
Teachers' Slots	Number of available vs. total slots per teacher
Parents' Schedule	Sorted appointment list per parent. Filterable by individual parent; can be emailed to all or one parent. *Can be sent directly to parents.*
Number of Parents and Students	Count of parents/students with appointments, sorted by date for multi-day events
Appointment Histogram	Number of appointments by date and time
Appointment Count by Parent	List of parents and how many appointments each has made
Appointment Count by Student	List of students with booked appointments
Students Without Any Scheduled Appointments	Students whose parents haven't booked any appointments. *Can be sent to parents.*
All Teacher/Team Appointments	Like Teachers' Schedule, but for teachers on a team, shows a combined master schedule of both individual and team appointments
Appointments by Date/Time	All appointments listed chronologically
Display Only Empty (Not Blocked) Slots	List of open, unblocked slots per teacher

Additional Report Fields: Most reports support adding extra columns via links like "*Student's Contact Fields,*" "*Parent's Contact Fields,*" and "*Appointment Fields*" — useful for pulling in details like email addresses or Student IDs.

Managing Reports

Every report supports the following options:

Action	Description
Format	Print, export to XML, or export to tab-delimited (Excel-compatible)
Email Report	Send the report to yourself or others
Save Report Settings	Saves customizations (e.g., added fields) so they persist next time you run the report
Schedule Report Delivery	Set a date range, time of day, and frequency for automated email delivery

Account-Specific Reports

Toggle to **Account Reports** mode to view data across your **entire vendor account** (all events).

Report	What it shows
Settings	Your account's auto-generated scheduler URL
Account – Invoices and Payments	Account balance, invoice history, and payment history. Click an invoice # to view it and pay by credit card.
Problem Appointments	Appointments placed "on hold" — e.g., when a slot with an existing appointment is deleted, the appointment isn't deleted but flagged here for review
Appointments from All Events	All appointments across every event on your account
Contacts Without Appointments	Contacts who've logged in but never booked an appointment
List of Administrators	Admin emails and access levels. For teachers (auto-assigned Appointment Viewer access), this also shows which resources/teachers they can access. Click **Additional Fields → Last Logged In** to see last login dates.
Cancelled Appointments	All cancelled appointments, with cancellation date/time and who cancelled
Appointment Counts for All Events	Total appointment counts across every event
Resource Mapping	Shows all resources and their associated contacts/teachers — useful for verifying Team assignments

Report	What it shows
Scheduled Report Delivery	Overview of your automated report deliveries — recipients, frequency, last sent date. Delete entries here to cancel a scheduled delivery.
Appointments Summary by Contacts	Appointments booked by specific contact(s), across all events on the account

Scheduling Parent Apppointments in the Admin UI

Administrators can manually book appointments for parents through the **Appointments** tab. Follow these steps to ensure the booking is correctly attributed.

Step 1: Navigate to the Schedule

1. Go to **Events / Preview**, select your event and press the orange **Go To Event** button.
2. Select the **Appointments** tab.
3. Use the calendar on the left to select the date.
4. Select the teacher from the list on the right to load their schedule.

Step 2: Select a Time Slot

1. Locate the desired time on the teacher's schedule.
2. Click the **green plus sign (+)** in that slot. The **Select Person** dialog will open.

Step 3: Identify or Create the Parent Contact

You must link the appointment to a parent. Choose one of the following:

Option A: Search for an existing parent

1. Type the parent's name (or the first few letters) into the search bar.
2. Select the correct name from the results on the left.
3. Review their details on the right to confirm accuracy, then click **OK**.

Option B: Create a new contact

1. If the parent isn't found, enter their **First Name**, **Last Name**, and **Email Address** in the fields on the left.
2. Click **Add → Parent...** to add them to your database.
3. Click **OK** to proceed.

Step 4: Finalize the Appointment

Once a parent is selected, the **Create Appointment** window will appear.

1. **Enter the student's name** in the designated field — this tells the teacher which student the meeting concerns.
2. Click **OK** to save. The slot will now show as occupied on the schedule.

Sending Custom Emails

The **Appointments List** page — **not** the main Appointments page — lets you search for and manage appointments by:

- A single date
- A date range
- An event

This returns a list of parents with appointments matching your search, along with options to **email**, **delete**, **confirm**, or **recreate** slots and appointments.

Sending Emails from the Appointments List

1. Click **Send Email** at the top of the page.
2. Choose **Send to All** or **Send to Selected**.
3. In the dialog that appears, choose an email type:
    - **Reminder email**
    - **Custom email**

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You can send using the existing template as-is, or customize it for this send.

> Email templates are managed under **Settings/ Notification Setup**.

Teacher Access

Teachers can view their own schedule by logging in at **pickatime.com** or via the school's scheduling link — the same way a parent would.

Once logged in, teachers are taken directly to the **Reports** page, where they can view their booked appointments.

For teachers who are also parents at the school:

These users will land on the standard parent scheduling page first. From there, they'll see an **Admin UI** link, which takes them to the **Reports** section to view their own teaching schedule.

Viewing Appointments on the Appointments tab

You can adjust several display settings to make the Appointments page easier to read.

Adjust row height (make time slots taller): On the **Appointments** tab, hover over one of the horizontal lines just above a time marker, then click and drag vertically.

Adjust column width: Hover over the space between two resource columns, then click and drag.

Adjust time markers and gridlines: Go to **Settings / Admin View Settings** and modify **"Time Mark Display on the Appointments Page."**

Adjust the visible time range (scroll bar limits): On the same **Admin View Settings** page, under **"Hours Visible on the Appointments Page,"** set the minimum and maximum hours shown.

> This range applies account-wide per event — it is **not** day-specific. If one day has slots from 8–5 and another has slots from 9–6, set the range to **8–6** so the scroll bar covers all possible slot times across every day.

Simple PTA Event Videos

Getting Started with your Simple PTA Event

- Creating a company account
- How it All Works

The Backend

- A Tour of the Admin UI
- CUI Messaging

Working with slots in your Simple PTA event

- Creating Slots in your Parent-Teacher Conference
- Adding in Travel Breaks
- Handling Lunch and Dinner Breaks
- Copying vs Moving Slots

Working with teachers in your Simple PTA event

- Understanding the difference between administrative levels
- Understanding the difference between Appointment Viewer vs maker
- How Teachers block their own schedule
- How to order teachers alphabetically
- Displaying Class Names in a Parent-Teacher Conference
- Manually adding a teacher

Working with parents in your Simple PTA event

- The Login As Feature
- How to remove Appointment Times
- How it works for parents

Additional features

- Customizing emails
- Understanding Appointment Fields
- Understanding reports