Parent Teacher Conference Guide Table of Contents

Parent Teacher Conference Set Up

Basic Information

- To add a Parent/Teacher conference to your SOCS site, you must have access to Parent Teacher Conferences Manager from the SOCS Toolbar.

- Teachers first must have access to the "Teacher" option in Parent Teacher Conferences and must be marked for each teacher involved in a conference.
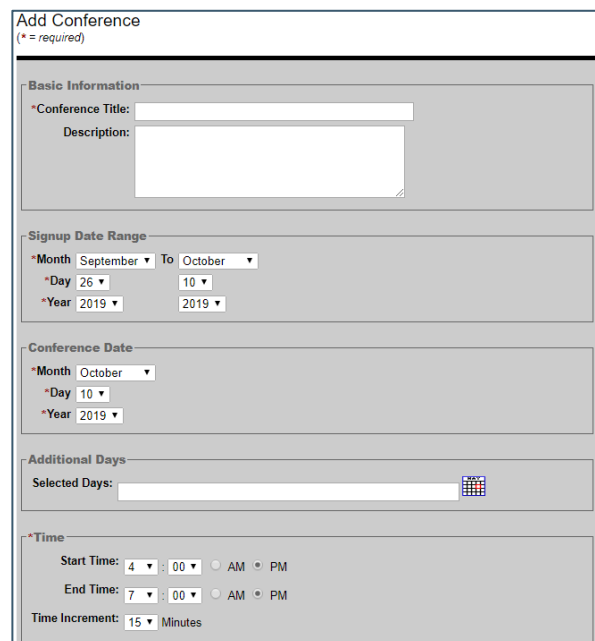
To Set Up a Conference

Select **Admin, Parent Teacher Conferences** from the SOCS Toolbar. Select "Add New Conference" and fill in the necessary fields:

- **Conference Title** – name of conference being added.

- **Description** – description of the conference not-seen by the public; internal use only.

- **Signup Date Range** – date range the public will be able to sign up for the conference.

- **Conference Date** – date the conference will be held.

  Note: Once a conference date has been established, it cannot be changed. If the date is incorrect, you have to delete the conference and re-enter the information for the correct date.

- **Additional Days** – use the "Selected Days" field to add additional conference days. Click on the calendar icon to bring up a grid calendar. Click on the additional day(s) you want for the conference. After selecting the date(s) close the calendar icon by clicking on "close".

Note: The "additional day(s)" will have the same start and end time as the main conference date. If the additional day(s) will have a different start and end time, set up a new conference for those day(s).

- **Time** – the daily start and end time for the conference.
- **Time Increment** – choose from the drop-down list the number of conference minutes per session/per attendee.

Display Options

Use the **Display Options** fields to select how the conference information is displayed to the public**.** Click the option you wish the public to see:

Option 1   All names will be visible to the public.

Option 2   Names will show in time slots reserved by Teachers and Administrators. Time slots reserved by the public will show as reserved – no names will appear.

Option 3   Time slots reserved by the current user (public) will display a check mark; time slots reserved by anyone else show as reserved.

Confirmation Registration Reports: Choose to display either the parent or student name.

Location: Location of the conference.

Fill in the Contact Information:

- Name of the person to contact regarding the conference.

SOCS – Parent Teacher Conference

- Email address for conference contact person.

- Phone number for conference contact person.

Click on "Continue" to select teachers involved in the conference. Remember – in order for teachers to be available for conferences, they must have teacher access to Parent Teacher Conferences (a Users Manager must set this up).

Setting Up Teachers

There are two options for selecting teachers:

- **Teacher Search option** – enter all or part of a teachers name to see a list of teachers with the criteria you entered as part of their name. Click "Add" next to the appropriate teacher(s) to add them to the conference.

- **The View/Select Results option** shows a list of all teachers that have "View" access for Parent Teacher conferences. Select the teacher(s) for the conference by marking the box next to the teacher name in the drop-down list of teachers.

View/Select Results

Your search found 34 matches. **1 – 34** are shown below.

Cancel   Add

Add	Name	Email
☐	Alpha, Fiona	alpha@socs.org
☐	Anderson, Mike	mikea@fes.org
☐	Anderson, Stacey	staceym@fes.org
☐	B, Tod	todb@fes.org
☐	Beta, Carol	beta@socs.org

Note: Upon completion of the teacher selection, click on "Add" to add the conference. You will return to the Conference List screen that shows all conferences scheduled.

- **Editing Teachers:** If you edit the "Teachers" assigned to a conference and remove one or more teachers by unchecking their checked box the following message will be displayed when the "Schedules" button is clicked (the button that saves the changes to the page and advances to the next page):

Selecting OK will delete the following teachers AND those registered to meet with them from this conference. The registrants will receive an email notification regarding the scheduling change and an opportunity to sign up again.

Alpha, Fiona
Beta, Carol

OK   Cancel

To Schedule Appointments for a Teacher

- Click on the edit button located under the "Teachers" column next to the conference.

- Click on "Schedules" at the bottom or top of the teacher list.

- Click on "Edit" next to the appropriate teacher's name.

Appointments for Alpha, Fiona

Schedules

October 10, 2019

Edit	Delete	Time	Reserved	Parent	Student
		Parent:			
		Email:			
		Student:			
		Update Cancel			
📝	🗑	4:15 PM			

- Click on "Edit" for the desired appointment timeslot and fill in the parent name, email address and student name. Click on "Update" to lock in the appointment.

To Create a New Appointment

- You can schedule appointments for the teacher outside of the conference date range by filling in the "Create a New Appointment" field at the bottom of the screen.

To Set Class Note

- Information entered in this field is specific to the teacher and will display to the public when they schedule appointments. This field can be used to list subject(s) taught by the teacher, the room number for the teacher, or other information relative to the specific teacher.
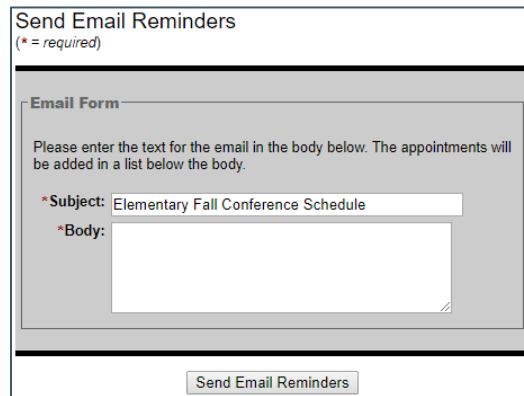

- Click on "Schedules" at the bottom of the page to return to the teacher list.

- Click "Done" at the bottom of the page to return to the conference list.

To Generate a Report

Click on the "Report" option for the appropriate conference. The report will show the individual teachers, time slots and the people signed up for each time slot. To print the report, click on "File" on the browser tool bar and select "Print".

To Send an Email

You can send email reminders to the conference participants by clicking on the "Email" option next to the appropriate conference. Put your reminder message in the "body" of the email. Reminder emails will go to all registrants. Individual appointments for each recipient will show at the bottom of each individual email.

For Teachers with View Access

A teacher with View Access to Parent Teacher Conferences can set up his/her own individual conference appointments.

- Select **Content, Teachers** from the SOCS Toolbar.

- Chose the appropriate conference.

- Click on "Edit" next to the appropriate time slot for the conference.

- Fill in the parent and student name, and email address for the time slot selected.

- Click on "Update" to schedule the appointment.

PTC Registration Process for Parents/Guardians

Where to Start

- **Click on the "Parent Teacher Conference" tab on the navigation. This will take you to the registration/sign in screen.**

- **Sign In**: If you previously signed up for SOCS calendar reminders, you are already a registered user for Parent Teacher Conference (PTC) and will use your email and the same password used for calendar reminders.

- **Sign Up NOW!** If you have not yet registered, you will complete the registration screen that asks for name, email and password. Upon completion, you will have password protected login access and will receive an email confirming your registration and login credentials. You will also have access to create calendar reminders.

<p align="center">**YOU ARE NOW AT THE PTC SCREEN**</p>

Signing Up for Parent-Teacher Conferences

Step 1: Choose the conference you wish to attend. Once you have chosen the conference you will be taken to a list of teachers associated with the conference.

Step 2: Select the teacher(s) from the list or by typing a last name in the "Search Teacher" field. *You can reserve time with up to eight teachers. You can register for additional teachers once you complete the current process.*

Step 3: Enter the student's name.

Step 4: Click continue.

Step 5: Check the box next to the conference times(s) you wish to reserve.

Step 6: Click Update **(the timeframe(s) you chose will be colored green)**.

At this point you may sign up for conferences for additional teachers or additional students by clicking on the "Teacher Selection" button.

- Choose additional teachers **OR**
- Repeat the process you just completed for additional student/s choosing new teacher/s and entering the additional student/s name/s
- Click Update.
- The timeframe you chose is colored **green** (registration for the additional teachers or student/s is added to your Confirmation Registration Report).

At the bottom of the screen you will see a confirmation of your conference registration. You will have the option to **"click here to print"** to get a copy of your Conference Registration Report.