

User Guide to PTCFast.com

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1. INTRODUCTION

1.1 PREFACE

PTCFast.com began offering parent-teacher conference scheduling in 2008-2009. Our goal was to make the system so simple that it didn't require a user guide. Tens of thousands of teachers and school administrators have used it without external documentation to schedule millions of appointments, and requests for help have always been remarkably infrequent. So we encourage you to try the system (for free) and see how it works. But of course, you are welcome to refer to this User Guide as well!

As with everything we do at PTCFast.com, we welcome your comments and suggestions on this user's guide (reach us at support@ptcfast.com).

– *PTCFast Support Team*

1.2 HOW TO USE THIS GUIDE

The remainder of this guide is divided into several sections. Section 2 (BASIC USAGE SCENARIOS) outlines typical scenarios for how people use the system. Sections 3 and 4 provide step by step instructions (Section 3 is for individual teachers, and Section 4 is for school administrators). Section 5 describes our payment system. Section 6 covers Team Teaching. Section 7 describes how parents interact with the system.

If you are a new user looking to get started as quickly as possible, we suggest you read Sections 2, and then read whichever part of the Section 3 or 4 pertains to you. Finally, we hope you will at least skim the remaining sections because this will alert you to options and features that may save you a lot of time.

2. BASIC USAGE SCENARIOS

2.1 OVERVIEW

PTCFast.com provides a set of online tools that allow a teacher or a school to set up one or many different parent-teacher conferences.

Conference

We define a “conference” as the appointment schedule for a single teacher/class. A conference has one or more Time Blocks, which can be on one or more days. Each Time Block has one or more Time Slots, each of which would be an appointment. For example, if Ms. Chu wants to schedule appointments on October 12 from 9-2 and October 14 from 8:45-3, each lasting 15 minutes with no gap between appointments, she would create a Time Block, set the date (Oct 12), start time (9am), duration (15 minutes), gap (0), and end of last appointment (2 pm). She

would then create a second Time Block with date (Oct 14), time (8:45 am, which would be entered from the “other” option on the dropdown list), duration (15) and gap (0), and end of last appt (3 pm),

An account can have one or more conferences. When your conferences are ready, you “launch” them, at which point it is possible for parents to begin signing up online for appointments.

Single School-Wide Account

If you are an administrator setting up multiple conferences for an entire school, you would normally create a single school account (total cost: \$50 per semester). Within this account you can set up all of your teachers’ conferences (the Manage Conference page is where you go to create new conferences). Users normally save a lot of time by setting up one teacher’s conference with the appropriate schedule, and then creating all the other teachers’ conferences as “clones” of the first conference. This will speed things up a lot if (as is usually the case) the choices you need to make for the different conferences tend to be similar or identical.

Teacher Access in a School-Wide Account

If you are the school administrator setting up many conferences on a single account, you may wish to provide each of your teachers with partial access to the scheduling process for their own conference. You can do this from the Reports/Deadlines page. E.g., you can allow your teachers to look at the schedule, set up appointments manually for parents who contact them directly, and even change time blocks. The level of control is up to you (you choose with the buttons on Reports/Deadlines page). Note that when you give teachers access, they **do not get their own regular login credentials** like you have--nor do they log in to your account. Instead, they will receive emails that give them links they can click on to access the system. They click on these links to see their own conference(s).

No Central School Account – Each Teacher Has Own Account

Some schools prefer to have their teachers each set up their own account and conference. This alternative way of organizing conferences is in Section 3.1 below.

Manage Conference Tab

Each account has a login based on one email address. That is the “Admin” for the account. Most of the management functions of the account are done on the Manage Conference tab. Here you can edit your account information, add or delete conferences, print schedules, generate reports, etc. Once you have created an account we recommend you familiarize yourself with the many functions available on the Manage Conference tab.

2.2 TESTING OUT THE SYSTEM

Many people want to test out the system on their own before using it for real conferences. For example, you might want to make test accounts, set up schedules, and go in as a simulated parent and see how it works—to figure out if it is suitable for your needs. If this is what you want to do, you want to get a Free Demo Account. Free Demo Accounts are limited in that you can’t make appointments for more than 5 parents with any conference created under a Free

Demo Account. To create a Free Demo Account, click on the “Free Demo” checkbox during the account creation process. If you want to turn a Free Demo Account into a real account (e.g., a Free Trial Semester account), you can do that at any time on Manage page. Otherwise, Free Demo Accounts are purged every few weeks. (Note that a Free Trial Semester account is an account with full privileges for a single semester, and is to be used with real conferences and real parents, whereas the Free Demo account is for small-scale testing of the system to see if it’s right for you.)

2.3 COMMUNICATING WITH PARENTS

Parents register themselves anew each semester. They do not acquire a permanent login and password on the system (because many parents change their email addresses frequently, we find this has many advantages). During the account creation process, you will be asked to you select one of three options for how to communicate with your parents (don’t worry - you can change your selection later). Whichever option you choose governs all the conferences on the account. The three choices are as follows:

- Option 1 (the easiest choice) is to have PTCFast set up a “**School Web Page**.” The system creates and hosts this webpage for your parents, and provides you with a single link which parents use to go online and pick their teachers. All parents at the school use the same link, which makes it simple. Many schools put the link on their homepage and simply direct parents to it in that way. Parents can sign up for as many conferences as they want. This option works well so long as parents know the name(s) of their children’s teachers. You simply include the teacher’s name in the name you give to each conference, and that way the parents can spot the conferences they need.
- Option 2. Each class/teacher gets a “**Class Code**”, which you give to the parents in that class. They go to a link which you provide to them and enter that code, which tells the system what teacher/class they are registering for. In this case, each class gets a different letter, typically sent to parents via backpack mail or distributed at open houses. It’s a bit more work for the school, but has the advantage that parents can only register for classes for which you want them to sign up. This may be a good choice if, for some reason, parents are not likely to know their child’s teachers’ names.
- Option 3. This is called the “**Parent Code**” option. Here, each parent is pre-assigned his or her own individual code for each conference they will be attending (a different code than what any other parent gets). This option requires you to enter a list of student names for each class, and the system then assigns a unique code for each. If you choose this option, when you got to Notice Settings (or Manage) you can get a file containing a letter for each parent explaining how it will work and giving them their code for this conference, which you deliver to them (typically via backpack or open house). Only about 1% of our schools use this option; it is more trouble but

has the advantage that it is probably a little more secure against most forms of “prank signups” (which have generally not been a big problem on the system).

2.4 SPANISH TRANSLATION OPTION

The Spanish Translation Option allows you to make screens and letters available in Spanish for parents who speak Spanish. To choose this option, go to the bottom of Manage page and check the box next to “Turn on Spanish translation option for parent communication”.

If you pick this option, pages used by parents will display a US and Spanish flag in the upper right-hand corner of the screen. If a parent clicks on the Spanish flag, the system will switch over to displaying screens in Spanish (in this session and in any subsequent sessions if the parent returns to the site.) The option can be unselected whenever the parent desires.

When the parent chooses the Spanish option, all the fixed (system-provided) text that is contained on any of the pages will be displayed in a Spanish translation constructed in advance by PTCFast.com.

To provide completely translated displays for Spanish-speaking parents, however, you also need to provide a Spanish version of the various “custom” text that you created on the various tabbed pages.

The way you do this is as follows: in the appropriate text box, you add two pound signs “##” and then your Spanish text.

For example, one piece of custom text you provide to the system is the location of the conference. If your English text says “Room 232 in the main building” you might instead now write “Room 232 in the main building##Habitación 232 en el edificio principal”

The user provided text that you can translate is found in the following places: four elements on the Emails page (location of conference, what to do if user does not have internet, final sentence to add to letter, and who letters are from), one item on the Reports/Deadlines page (what the system should tell parents if all the appointments are taken) and two elements on the Manage Conference page (special requests, and intro to the School Web Page if chosen.)

Note that you do not have to provide Spanish translation of all of these elements. If you just put in the English, that will be displayed, and it may suffice to communicate with your Spanish speaking parents. Also if you should happen to decide to turn off the Spanish Translation Option checkbox after adding text separated out by ##s, that won't be a problem; even with that option off, the system will not display anything after the ##.

3. INSTRUCTIONS FOR INDIVIDUAL TEACHER ACCOUNTS

Signing up as an individual teacher with one conference is exceptionally easy. From the home page, click on Teacher/School Login and look for “To Create a New Account, Click Here”. System will offer button to Create Free PTCFast Account”. Click on this. Sign up under First Time Users, providing email, password, school name and location, and click [Login to Create Conference](#).

Assuming no one from your school has used the system before, choose “Create a One-Time Free Trial Semester”. (Free Demo Account is for small-scale testing of the system with no real parents involved; Free Trial Semester is to try out the system “for real” for one semester.) Choose which semester you will be using your Free Trial Semester in.

The system will now ask you for your email and a password. This is your account access information. It will also ask for your school name and location and to indicate if you will want your parents to be able to access Spanish text (more details on Spanish in Section 3.1 below).

The next step will be for the system to ask you how you wish to communicate with your parents. The three basic options were discussed above—see Section 2.3. As an individual teacher you probably want to select Conference Code option (the School Web Page is a bit more elaborate than what you need for one conference).

Finally it asks you for the name of your conference. Probably you will want to include your own name in the conference name, e.g., “Parent/Teacher Conference with Ms. Jones”. Also indicate the grade level.

When you are ready, click on [Enter my choice and create Time Blocks](#) button.

At this point you are ready to create some “time blocks”. A time block is a set of consecutive appointments. For example, one time block might run from 9 AM to noon, and might consist of 3 15-minute appointments per hour with 5 minute breaks between appointments. If you want to have a big break (e.g., for lunch), it is best to create one time block before lunch and a second time block after lunch. (Some users set up one big time block running the whole day, and then make a fake appointment for “LUNCH”. This will probably work OK, but it has some disadvantages, so we do not recommend that.)

To create a time block, first select the date. You can create a time block as much as two years in advance (the system checks that you have a Free Trial Semester for that semester, or that you have paid for that semester—See Section 6 below.). Then pick the start time for the whole block, the length of each appointment and the gap between the end of one appointment and the start of the next. So for example, if you want 3 15-minute appointments per hour with 5 minute breaks, set Length of Meeting = 15 minutes and Gap = 5 minutes.

Some users want to set up appointments that start at “funny times” like 2:07. Can you do that? Yes! In the Start Time menu, click “Other”. The system will provide a blank in which you can enter e.g., “2:07 PM”. Be sure to type it in just like that (i.e., don’t forget the AM or PM!).

Before submitting your first time block, you also need to select the end of the last appointment in the time block. The dropdown menu will calculate the potential end times based on your choice for duration and start time—pick the end time that works for you.

When you have made all these selections, click on [Submit Selected Times and Display Schedule](#). The system will now display all the time blocks you have selected—along with

options to Add New Block, Edit Block, Delete Block. In the Time Blocks display, you'll also notice a place where the name of the parent can be displayed. Since you just created the Time Block, and have not launched the conference yet, all the appointment times will appear as "unfilled". Continue to make as many time block as you need for your conference. When you are all done with that, click on [Done with Times](#).

If you are using a regular account (as distinct from a Free Demo or Free Trial Semester), the system will ask you to pay \$4.00 for the conference, specifying what semester it will take place in. It doesn't matter if that semester has begun or not. Once you have purchased and redeemed a ticket for a given semester, you are free to create Time Blocks which take place in that semester. (Time Blocks is the "gate" where the system checks payment status.)

In addition to [Done with Times](#), you'll notice several other actions available to you here on Time Blocks. You can view the schedule as parents will see it, and you can also send appointment reminders to all parents, and print a schedule. For now, don't worry about these options, but once your conferences are launched, these may come in handy.

When you indicate you are done with time blocks, the system checks to be sure that you either have a Free Trial Semester or Free Demo status for that semester, or that you have paid for usage for that semester, or that you have paid for the individual conference you are working in for that semester. If you have not, it will offer to send you to the Billing page where you can get paid up. After paying, you can always go back to the Billing page (available via Manage) and obtain a printable invoice or a PDF invoice.

After Time Blocks, the next screen you see is Notice Settings. Here you are reminded of what choice you made about how your parents will sign up. This screen also allows you to print letters to send parents telling them how to use the system. For users setting up multiple conferences, however, you may wish to create all your conferences first and then come back here (or go to Manage) to obtain these letters to parents.

The next screen is called Emails. Here you provide some basic information that will be incorporated in emails that are sent to parents when they sign up, and contained within the reminder emails they will receive before their appointments. We think you'll find the questions pretty self-explanatory.

The Reports and Deadlines page allows you to specify how often you want the system to communicate with you. We recommend letting it provide frequent updates, and the default selections provide for that. This page also allows administrators to enter the email of a teacher (or other colleague) associated with a particular conference, designating them to receive updates about the conference. Please read the options in the Designate Colleagues section carefully so you understand the choices you are making. But for individual teachers, this section will probably not affect you.

If you have made the required selections on all the previous pages, you are now able to view our Terms of Service and launch your conference. On the Launch page, you will be told about anything that needs to be finalized prior to launch.

Once you have launched your conference, parents can begin to sign up, following whatever choice you made about the method of communication with parents (discussed above in 2.3). You can always change your mind on the Manage Conference page. You are welcome to come

back and log in any time you want, either before or after you launch. The system will generally start you off in the Manage Conference page. Visit TimeBlocks to see the appointment times (and after launch, this will also display the names of parents who have signed up, if any.)

3.1 SPANISH TRANSLATION OPTION

The Spanish Translation Option allows you to make screens and letters available in Spanish for parents who speak Spanish. To choose this option, go to the bottom of Manage page and check the box next to “Turn on Spanish translation option for parent communication”.

If you pick this option, pages used by parents will display a US and Spanish flag in the upper right-hand corner of the screen. If a parent clicks on the Spanish flag, the system will switch over to displaying screens in Spanish (in this session and in any subsequent sessions if the parent returns to the site.) The option can be unselected whenever the parent desires.

When the parent chooses the Spanish option, all the fixed (system-provided) text that is contained on any of the pages will be displayed in a Spanish translation constructed in advance by PTCFast.com.

To provide completely translated displays for Spanish-speaking parents, however, you also need to provide a Spanish version of the various “custom” text that you created on the various tabbed pages.

The way you do this is as follows: in the appropriate text box, you add two pound signs “##” and then your Spanish text.

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The user provided text that you can translate is found in the following places: four elements on the Emails page (location of conference, what to do if user does not have internet, final sentence to add to letter, and who letters are from), one item on the Reports/Deadlines page (what the system should tell parents if all the appointments are taken) and two elements on the Manage Conference page (special requests, and intro to the School Web Page if chosen.)

Note that you do not have to provide Spanish translation of all of these elements. If you just put in the English, that will be displayed, and it may suffice to communicate with your Spanish speaking parents. Also if you should happen to decide to turn off the Spanish Translation Option checkbox after adding text separated out by ##s, that won't be a problem; even with that option off, the system will not display anything after the ##.

4. INSTRUCTIONS FOR SCHOOL ACCOUNT WITH MULTIPLE CONFERENCES

If you are setting up multiple conferences for a school, the “normal” approach is to create one account for the school, with separate conferences created under this account. (You create new conferences on the Manage Conference Screen, and that is also where you pick which conference you want to work on at any given time.) Note, however, that some schools let each of their teachers create their own account. The remainder of this section is for the school administrator (account holder) in a school that is using the “typical” and simplest approach: a single school account with multiple conferences set up under that account.

To set up your school account, from the home page, click on Teacher/School Login and look for “To Create a New Account, Click Here”.

Assuming no one from your school has used the system before, choose “Create a One-Time Free Trial Semester”. (Free Demo Account is for small-scale testing of the system with no real parents involved; Free Trial Semester is to try out the system “for real” for one semester.) Choose which semester you will be using your Free Trial Semester in.

The system will now ask you for your email and a password. This is your account access information. It will also ask for your school name and location and to indicate if you will want your parents to be able to access Spanish text (more details on Spanish in Section 4.1 below).

The next step will be for the system to ask you how you wish to communicate with your parents. The three basic options were discussed above—see Section 2.3. The simplest approach we generally recommend is School Web Page Option, unless you have a strong reason to make one of the other choices.

Finally system will ask you for the name of your conference. Probably you will want to include the teacher’s name in the conference name, e.g., “Parent/Teacher Conference with Ms. Jones” (especially if you are using School Web Page option, which requires parents to pick out which conferences are appropriate for them). Also indicate the grade level.

When you are ready, click on Enter my choice and create Time Blocks button.

At this point you are ready to create some “time blocks”. A time block is a set of consecutive appointments. For example, one time block might run from 9 AM to noon, and might consist of 3 15-minute appointments per hour with 5 minute breaks between appointments. If you want to have some breaks (e.g., for lunch), it is best to create one time block before lunch and a second time block after lunch. (Some users set up one big time block running the whole day, and then make a fake appointment for “LUNCH”. This will probably work OK, but it has some disadvantages, so we recommend not doing it that way.)

To create a time block, first select the date. You can create a time block as much as two years in advance. Then pick the start time for the whole block, the length of each appointment and the gap between the end of one appointment and the start of the next. So for example, if you want 3 15-minute appointments per hour with 5 minute breaks, set Length of Meeting = 15 minutes and Gap = 5 minutes.

Some users want to set up appointments that start at “funny times” like 2:07. Yes, you can do that! In the Start Time menu, click on “Other”. The system will provide a blank in which you can enter e.g., 2:07 PM (don’t forget the AM or PM!).

Before submitting your first time block, you also need to select the end of the last appointment in the time block. The dropdown menu will calculate the potential end times—pick the one that works for you.

When you have made all these selections, click on [Submit Selected Times and Display Schedule](#). The system will now display all the time blocks you have selected—along with options to Add New Block, Edit Block, Delete Block. In the Time Blocks display, you'll also notice a place where the name of the parent can be displayed. Since you just created the Time Block, and have not launched the conference yet, all the appointment times will appear as “unfilled”.

Continue to make as many time block as you need for your conference. When you are all done with that, click on [Done with Times](#).

When you indicate you are done with time blocks, the system checks to be sure that you either have a Free Trial Semester status for that semester, or that you have paid for semester usage for that semester. If you have not, it will offer to route you to the Billing page where you can do so. After paying, you can always go back to the Billing page (available via Manage) and obtain a printable invoice or a PDF invoice.

After Time Blocks, the next screen you see is Notice Settings. Here you are reminded of what choice you made about how your parents will sign up. This screen also allows you to print letters to send parents telling them how to use the system. For users setting up multiple conferences, however, you may wish to create all your conferences first and then come back here (or go to Manage) to obtain these letters to parents.

In addition to [Done with Times](#), you'll notice several other actions available to you here on Time Blocks. You can view the schedule as parents will see it, and you can also send appointment reminders to all parents, and print a schedule. For now, don't worry about these options, but once your conferences are launched, these may come in handy.

After Time Blocks, the next screen you see is Notice Settings. Here you make a fundamental choice about how your parents will sign up. We recommend the first option, called “Simple No-Code Option”. Here, you provide parents with general access to the webpage where they sign up for appointments. The second option, called “Parent Code Option” is a more complex process, where you send each parent a specific code allowing them to sign up. If you are very worried about prank sign-ups, you may wish to choose this option. However, there are several disadvantages to making this selection, and we do not generally recommend it.

The next screen is called Emails. Here you provide some basic information that will be incorporated in emails that are displayed to parents when they sign up, and contained within the reminder emails they will receive before their appointments. We think you'll find the questions pretty self-explanatory.

The Reports and Deadlines page allows you to specify how often you want the system to communicate with you. We recommend asking for frequent updates, and the default selections there do that. This page also allows administrators to provide the email of a teacher (or other colleague) associated with each particular conference, designating them to receive updates about the conference. Please read the options in the Designate Colleagues section very carefully. If you are an individual teacher, this section will probably not affect you.

If you have made the required selections on all the previous pages, you are now able to view our Terms of Service and launch your conference. On the Launch page, you will be told about anything that needs to be finalized prior to launch.

If you are setting up a whole set of conferences, you may wish to set all of them up before you launch any of them. That's fine—the Manage Conference page has a “mass launch” feature that will let you launch a whole group at once, when you are ready. So when you're done with one conference, go to Manage Conference page and click on Set Up New Conference. The system will allow you to use an earlier-created conference as a model.

Once you have launched your conferences, parents can begin to sign up. You need to tell them how to do this (PTCFast does not yet have your parents' email addresses so it cannot contact them directly.)

After creating one conference, you can create additional conferences as “clones” of the original one. This is convenient when you have many teachers with the same basic schedules, as most schools do. To add each new conference, you simply go to Manage Conference page, and select “Create a new conference”. The system will ask you if you want to make it a “clone”.

You are welcome to come back and log in any time you want, either before or after you launch. The system will always start you off in the Manage Conference page, so you can pick what conference you want to look at (using the radio buttons there). Visit TimeBlocks to see the appointment times (after launch, this will show you the names of parents who have signed up, if any.)

5. FEES AND PAYMENT

The system is ad-free. The site covers its costs with modest user fees. The standard fee is \$50.00 per school per semester for unlimited teachers and appointments, or \$4 per teacher per semester, whichever is less. You also have the option for each teacher to create their own account (no central school account) in which case the fee is \$70.00 per school per semester for unlimited teachers and appointments, or \$4 per teacher per semester, whichever is less.

We define the semesters as Fall (July 1 - December 31) and Spring (January 1 to June 30). We call the \$50 option a "Paid Semester" and the \$70 option a Group Billing Ticket. For the \$4 option the teacher or school buys "Tickets" good for one class of conferences. If the school buys the tickets, it can distribute them (actually their ticket numbers) to the teachers who enter them in their accounts.

Most school pay with a credit card from the Billing page, which is off the Manage Conference tab. The account is ready to use immediately upon payment. If the school district is paying for multiple schools, or if payment is to be made by check, an Order can be created at www.ptcfast.com/orders.php. Here users can get a) our vendor information and W9, b) enter their billing information, c) download an Invoice, d) pay for Semesters or Group Billing Tickets for one or multiple schools, and e) pay with a credit card or place the order and mail a check.

You do not need to be “paid up” to access your account and your data. You can always access those things. It is only when you create a time block in a given semester that the system checks to make sure you have paid for that semester.

Thus, for schools that only have Fall conferences, you can pay \$50 per year and have continuous access to your conference account and data.

For new users, we offer one Free Trial Semester for any school that wants to try out running their conferences using the system for one semester and see how it works for them. After doing that, a user can convert to a regular account. (Note that Free Trial Semester is a fully functioning run with real conferences and real parents for one semester; it should not be confused with the Free Demo Account which lets you run your own small-scale tests of the system, e.g., signing up fake parents, getting parent reminder letters, etc.)

More details about our payment policies and options can be found at <https://ptcfast.com/pricing.html>.

6. ORGANIZING CONFERENCES FOR SCHOOLS WITH TEAM TEACHING

Schools that use team teaching can pose a challenge in scheduling parent-teacher conferences. There are a number of different team teaching models, and each of them is best handled with a somewhat different arrangement. The simplest model is where parents meet with an entire teaching team as a whole. Naturally, for this, you don’t need to do anything special except give the conference the name of the team (rather than just one of the teachers). If you pick the School Web Page option (described above), it is especially important to use conference names that will make sense to parents, since the parents will need to pick the appropriate conference(s) from the list of all the conferences being run at your school.

6.1 EACH PARENT MEETS INDIVIDUALLY WITH THE TEAM’S TEACHERS IN ASSEMBLY-LINE FASHION

Suppose a team consists of Teachers A, B, and C, and you want each parent to meet first with A, then B, then C, each for 10 minutes. How would you do this? You could set up your first conference for the Team with a timeblock consisting of 30 minute appointments starting on the hour (e.g., 9 AM, 9:30 AM, 10 AM, and so forth). Then click “Add new Timeblock” but select times that are offset by ten minutes from the hour (i.e., appointments at 9:10 AM, 9:40 AM, 10:10 AM, and so forth). When you do this, the software will warn you that you are setting up timeblocks that overlap. That’s no problem for you, and you can even tell it to not remind you again. Finally, create the third timeblock, with appointments at 9:20 AM, 9:50 AM, etc. So now the team has 30-minute timeblocks starting every 10 minutes.

So now if a parent picks the timeblock starting at, e.g., 9:10 AM, they meet first with Teacher A for 10 minutes, who then sends them on to Teacher B for 10 minutes, and finally they move on to Teacher C for 10 minutes.

6.2 PARENTS MEET WITH THE TEAM AS A GROUP

Suppose you want to provide for multiple parents to meet with a group of teachers (or with an individual teacher) at the same time—what then? This is easy to set up. Suppose you have four teachers in the team, and you want four parents in each 30-minute meeting. In each single conference you simply create four separate timeblocks with exactly the same start times, durations, and end times. For example, each of the four timeblocks might start at 9 AM and end at 12:00 PM, with a new meeting every 30 minutes. As you set up each time block (after the first one), the software will warn you that you are setting up overlapping time blocks. Just tell it that that is OK, and it won't bother you any further.

7. THINGS TO KNOW ABOUT PARENTS' INTERACTIONS WITH THE SYSTEM

7.1 PARENTS WHO DON'T HAVE INTERNET ACCESS

Most schools find that even if a lot of parents lack internet access, using PTCFast.com still saves an lot of time because it is easy for teachers or administrators to log into the system and create appointments manually. The Parent Letters contain instructions (text specified by you from the Emails screen) for the parents about whom to call to schedule an appointment manually. At some schools, this is done by an administrative staffer; at others, parents call the teacher to schedule. For administrators who are logged into the system, click on Time Blocks to see the list of slots; to sign up parents manually, just click on unfilled. When you do that, you can put in parent emails (when they have them) and trigger email confirmations. If the teachers will be doing the manual scheduling, you need to check boxes 1 or 2 on the "Designate Colleagues..." section of Reports/Deadlines Screen.

7.2 SCHEDULING FOR SIBLINGS

Some parents have more than one child to schedule, either in different classrooms or (less commonly) in the same class. With PTCFast, parents can register just once and sign up for multiple appointments for multiple children.

If you set up your account in the most common way (all teachers/conferences set up on one account, with School Web Page selected for the parent communications option—see Notifications page), this is very easy. When the parent visits the School Web Page, they pick all the conferences they want to set up appointments for, specifying the first child's name. Once

the parent has registered and clicked on a link in the confirmation email they receive, they will see a large display showing the available times for all the conferences they have picked. After they finish that selection process, they are offered the chance to select times for another child, and so forth.

If you don't pick the School Web Page option, but instead pick the Class Code option, you will instead need to provide parents with letters containing a class code for each of their conferences. In this case the parent only needs to register once, and they can pick all their appointments by providing the class codes for subsequent appointments after the first one.

7.3 PARENTS CONTACTING PTCFAST CUSTOMER SUPPORT

From time to time, parents click on _and send us an email saying "please cancel my appointment" or "I want an appointment for 4:30 PM on October 15." When we get such emails we advise the parent that while we provided the software the school is using to organize their conferences, actual scheduling is up to schools--so they need to contact the school directly.

8. RE-USING THE SYSTEM FROM SEMESTER TO SEMESTER

One of the great conveniences of the PTCFast.com is that once you have set up one set of conferences on the system, setting up the next set of conferences the following semester can be even easier. Basically, you can re-use your old conferences (avoiding the trouble of re-entering information like the teacher's name, the report/deadlines selections, and so forth.) When you log back into the system after not using it for more than a few weeks, it will offer you the chance to purge parent appointments from any old conferences you may have. In order to facilitate easy set-up of your next round of conferences, we recommend selecting this. Once you have done that, you just need to follow three easy steps to set up the next round of conferences.

8.1 FOUR STEPS FOR QUICK CONFERENCE UPDATING

- Select any one of your old conferences to serve as a schedule template (you do this on Manage).
- Go to the Time Blocks screen for this conference. If there are old appointments, you'll need to use "Delete All Appointments" to wipe them out. Then adjust the dates/times to create the schedule you want for the new semester.
- Next, go to the Manage Conferences page and click on the "" link. As per the instructions there, click on "Copy Schedule from one conference to others" link. The system will then ask you from which conference you want to copy the schedule: choose the template conference you just edited in the preceding steps above.
- Finally, you will be asked which conferences you want to copy the template schedule onto: click on **all** of your old conferences. Then click to "Proceed...". Presto! Your conferences now all have the new updated schedule. Note that they will still have all the same option selections that you made last semester (teacher emails, notification

settings, etc.). If you need to change those settings, select each conference in turn (from Manage), then go to the appropriate page and make the change you want.

Now the new set of conferences are just waiting to be launched (and you can launch them all in one click from the Manage Conferences page, "Launch all conferences" link.)

9. SOME GROUND RULES

Rules for Free Trial Semester

Free Trial Semesters will be approved only when our records show that no teacher or administrator from that school has used the system in the past. If this limitation seems inappropriate in your situation, or if you have questions, please contact us at support@ptcfast.com and explain.

Note that as a courtesy we gave prior users a Free Trial Semester in Fall, 2017, even though they had used the system in the past.

Privacy Policy

In addition to being completely ad-free, our system guards the privacy of users as much as we can. We only contact parents with information specific to their signups. We do not share information with anyone outside of PTCFast. We do not sell lists of teachers' or administrators' contact information, email, etc. And we use 256-bit encryption https for privacy protection.