

# User Guide to PTCFast.com

## 1 INTRODUCTION

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PTCFast.com was designed in 2008-2009. Our explicit goal was to make the system so simple to use that it doesn't require a user guide. Tens of thousands of teachers and school administrators have used it without a guide, and more than a million student appointments have been made on the system. Over this period, requests for help have been quite infrequent. However, the system has grown in complexity and sophistication as we have responded to requests and suggestions from users. At this point, it seemed to us that a brief user guide would be helpful to many users, so we have prepared this one. As with everything we do at PTCFast.com, we welcome your comments and suggestions (at [support@ptcfast.com](mailto:support@ptcfast.com)). – Mike & Ed, Founders, November, 2014

## 2 HOW TO USE THIS GUIDE

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The remainder of this guide is divided into several sections. Section 3 (BASIC USAGE SCENARIOS) outlines basic scenarios for how to use the system (Section 3.3 is for individual teachers, and Section 3.4 is for school administrators). Section 4 covers Team Teaching. Section 5 describes how parents interact with the system. If you are a new user, we suggest you read Sections 3.1 and 3.2, and then read whichever part of the Section 3.3/3.4 pertains to you. Finally, we hope you will at least skim the remaining sections.

## 3 BASIC USAGE SCENARIOS

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### 3.1 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. After you create an account, you can set up one or more conferences on the system, and adjust the options to your own liking. When you are ready, you “launch” these conferences, which make it possible for parents to begin signing up online for appointments.

If you are an administrator setting up multiple conferences for an entire school, you should normally create just a single administrator account; within this account you can create all of your conferences (the Manage Conference page is the place to create new conferences). You can set up additional

conferences by cloning one starting conference, which will speed things up if (as is usually the case) there is a lot of overlap between the choices you need to make for the various conferences. If you are the school administrator setting up many conferences, from the Reports/Deadlines page you can provide each teacher with partial access to the scheduling process for their own conference; e.g., you can make it so that they can manually set up appointments for parents who contact them directly. Note that when you do this, the teachers do not get their own full login credentials nor do they log in to your account—instead, they receive emails that contain links to access the system. (Some schools have individual teachers each set up their own account and conference; this is briefly discussed at the beginning of Section 3.4 below.)

One other general tip: Whether you are an individual teacher or an administrator setting up many conferences, many of the most useful features on the site are found on the Manage Conference page. Here you can do things like edit your account information, add or delete conferences, print schedules, and so forth. Once you have created an account we recommend you tour the Manage Conference page so you can get familiar with the many tools available there (and when you log into the site Manage Conference will normally be your starting point).

## **3.2 TESTING OUT THE SYSTEM.**

Many people want to test out the system before using it for their school, to make sure it is suitable for their needs. We completely understand that desire and are happy to support it. It is fine to set up an account for test purposes, and to simulate running some conferences with it. Once you have decided to go forward with “real” conferences, you can use tools on the Manage Conference page to make new conferences and make other adjustments. If you sign up with an email address you use just for testing, and end up abandoning the test account, it’s fine to just leave it sitting unused. Eventually the data will be deleted.

## **3.3 BASIC INSTRUCTIONS FOR INDIVIDUAL TEACHERS USING THE SYSTEM FOR A SINGLE CONFERENCE.**

Signing up as an individual teacher with one conference is exceptionally easy. From the home page, click on Teacher/School Login (left command menu). Sign up under First Time Users, providing email, password, school name and location, and click [Login to Create Conference](#).

The system takes you to the Add New Conference page. Fill in the Name of Your Conference. Probably you will want to use your own 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 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](#).

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. For almost all users, 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.

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 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. You need to tell them how to do this (PTCFast does not have your parents' email addresses so it cannot contact them directly.) The system will describe several options for you.

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

### 3.3.1 Communicating with Parents

The next (very critical) step is to let parents know what steps they must follow to register and sign up. Since you just have a single conference, you will use what we call Parent Letters. After you Launch, you will see a link on Manage Conference called "[View/print the letters that you will hand out to parents telling them about the on-line signup system.](#)" Clicking on this will bring up copies of letters that you need to send to parents. You can get the letters to the parents via backpack mail, or US mail. Or if you have another means of emailing your parents, you can copy and paste the letters into emails.

## 3.4 BASIC INSTRUCTIONS FOR ADMINISTRATOR USING THE SYSTEM TO SET UP MULTIPLE CONFERENCES FOR AN ENTIRE SCHOOL (OR GROUP OF TEACHERS).

If you are setting up multiple conferences for a school, the "normal" approach is to set up one account for the school, with separate conferences created under this account. (You add new conferences from the Manage Conference Screen.) However, some schools actually let each individual teacher create their own account (in that case, the instructions in Section 3.3 above represent what each teacher needs to be familiar with.) The remainder of Section 3.4 is devoted to the "normal approach": a single school account with multiple conferences.

From the home page, click on Teacher/School Login (left command menu). Sign up under First Time Users, providing your own email, a password, the school name and location, and click [Login to Create Conference](#).

The system takes you to the Add New Conference page. Fill in the Name of Your Conference. Probably you will want to use your own name, e.g., "Parent/Teacher Conference with Ms. Jones". Also indicate the grade level (for multi-grade levels, it is probably simplest to pick the lowest grade). 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](#).

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 a 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.) The system will describe several options for you.

For school administrators, you will probably want to use the School Web Page Option. This option is available on Manage Conference page. Choose “Check here if you wish to use and link to this page.”

Once you have launched your conference, parents can begin to sign up. You need to tell them how to do this (PTCFast does not have your parents' email addresses so it cannot contact them directly.) The system will describe several options for you.

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

### 3.4.1 Communicating with Parents.

The next (critical) step is to let parents know what steps they must follow to register and sign up. You have two options:

A. The simplest is to enable the School Web Page (SWP). If selected, PTCFast will create a web page where parents can select their conference(s) and register. The option to select this webpage is found on the Manage Conference screen, where it is described in detail (please read the text since it contains some important details). If you enable this option, you simply tell all your parents to go to the web link (provided for you on Manage Conference) - the rest is self-explanatory. Many schools find that the simplest way they can do this is by placing a link to the School Web Page on the school's website and directing parents there. (Note that the SWP option is not available to schools which choose the "Parent Code" option on the Notifications page—for many users, that's just one more reason to pick the Simple No-Code Option on Notifications.) One thing to keep in mind when using the SWP is that you need to name each of your conferences in a way that will enable parents to tell which conferences to sign up for. (You can always edit the conference names from a link on Manage Conference screen.)

B. If you do not want to use the School Web Page option for some reason, you will need to give parents another way to select their school and conference. We do this with what we call Parent Letters. After you Launch, you will see a link on Manage Conference called "[View/print the letters that you will hand out](#)

[to parents telling them about the on-line signup system.](#)" This will bring up copies of letters that you need to send to parents, typically via backpack mail, with directions on signing up. These letters give parents a procedure to go straight to the appropriate conference.

## 4 ORGANIZING CONFERENCES FOR SCHOOLS WITH TEAM TEACHING

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There are a number of different team teaching models, and each of them requires 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 name the conference with the name of the team (rather than just one of the teachers). If you pick the School Web Page option (described above), always be sure to use conference names that will make sense to parents, since the parents will need to pick the appropriate conference(s) from the entire list of conferences you have set up at your school.

### 4.1.1 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 Teacher A, 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 when a parent shows up 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.

### 4.1.2 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.

## 5 THINGS TO KNOW ABOUT PARENTS' INTERACTIONS WITH THE SYSTEM

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### 5.1.1 Parents Who Don't Have Internet Access

Most schools tell us that even if a lot of parents lack internet access, using PTCFast.com still saves an lot of time, because it is easy to insert 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.

### 5.1.2 Scheduling for Siblings

Some parents have more than one child to schedule, either in different classrooms or (less commonly) in the same class. 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 in one account, with all conferences set up on the Notifications page as "No-Code" option, and the School Web Page option enabled on the Manage Conference page), then 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.

As mentioned above, if you do not enable the School Web Page option, you will instead need to provide parents with letters containing a class code for their conference. In this case the parent, while only needing to register once, would be asked for a class code for subsequent appointments after the first one.

### 5.1.3 Parents Seeking Customer Support

It is not uncommon for parents to click on [support@ptcfast.com](mailto:support@ptcfast.com) and to 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 we provided the software the school is using to organize their conferences, and that they should contact the school directly.

## 6 RE-USING THE SYSTEM FROM SEMESTER TO SEMESTER

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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 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 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.

### 6.1 THREE STEPS FOR QUICK CONFERENCE UPDATING

- First, select any one of your old conferences to serve as a schedule template. 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.
- Now go to the Manage Conferences page and click on the "Copy data to create next semester conferences" link. You will see instructions, and then click on "Copy Schedule..." link. The system will then ask you from which conference you want to copy the schedule: choose the template conference you just edited.
- 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 have the new schedules--but they will still have all the same option selections that you made last semester (teacher emails, notification settings, etc.). Now they are just waiting to be launched (and you can launch them all *en masse* from the Manage Conferences page, "Launch all conferences" link.)