

Step-by-Step Teacher Instructions for the Online Scheduler

Before you
begin

- A. Questions? Click this button  for help. It is located in the upper right hand corner of the **Make an Appointment & View Schedule** page.
- B. Still need help? Just send an email to support@canyoncreeksoftware.com

Accessing
the system

1. Access the Online Scheduler by clicking on this button on your school's web page:



2. On the **“Welcome to the Online Scheduler”** page click the  button in the upper left-hand corner of the page.

3. **Please sign in:**

Email Address	=	enter your email address
Password	=	enter your last name then click 

Your Initial
Set-Up

4. On the **“Teacher Info Change”** page, first change your Password (required the first time you log in) then,
5. Verify or select the grade that you teach.
6. Verify or select your salutation i.e., Dr., Miss., Mr., Mrs., Ms.
7. Verify or modify your First Name and Last Name
8. Option to choose how the room number sentence reads on the take home note (and emails) by entering in the location of your conferences—e.g., your room number or “the library.”
9. Select “N” on the “Show name on Parent Selection Screen” if you are NOT participating in the use of the Online Scheduler—this action keeps your name from appearing on the list of teachers available for appointments. Otherwise leave as “Y.”
10. Choose whether or not the take-home note should include a request for the student to attend this set of conferences.
11. Select “Y” if you would like to use the school's standard “school wide” conference schedule. Or “N” if you would like to start with a completely blank schedule—(usually “N” is selected by teachers wishing to create appointment time slots that are either shorter or longer in duration than the “school wide” appointment time slots. E.g., 15 minutes rather than the usual 20 minutes.)
12. Click the  button to display the **“Make an Appointment & View Schedule”** page and begin using the system.

13. From the “**Make an Appointment & View Schedule**” page:

A. “**CURRENT SCHEDULE**”

- i. You can view the current schedule (initially, all times are “**AVAILABLE**”)
- ii. To switch a time from **AVAILABLE** to **BLOCKED OUT** simply click on **AVAILABLE** (and vice-versa).
- iii. To switch a number of times, check the box in each time slot you want to switch and then click 
- iv. Click the **Print a copy of your schedule?** to print your schedule

B. “**ADD A TIME TO YOUR SCHEDULE**” For use **only** if you need to:

- i. Add additional “available” time slots outside of the “school wide” schedule--e.g., if a parent cannot make it during the normal times.
- ii. Schedule a specific student appointment outside of “school wide” times--
- iii. To add a range of times, click on the  button in the column header of the day you want to add the times. Enter in a START TIME, END TIME and the INTERVAL and click the Add Time Slots button. (NOTE: the MAX APPOINTMENT PER TIME SLOTS field should generally be set to 1—so only one appointment can be made per time slot.)
- iv. You can delete the times you added by clicking on the **X**

C. “**MAKE AN APPOINTMENT**” For use when you need to:

- i. Schedule an appointment for a specific student (from the pull down list).
- ii. Schedule the remaining “unscheduled” students (parents) just prior to conference week. I.e., the students’ parents/guardians that have not yet made an appointment with you. The drop down list only contains the names of the students with no appointment. (Generally teachers make these appointments after the Parent Window has closed.)
- iii. You can delete any appointments by clicking on the **X**

D. “**TAKE HOME NOTES**”

- i. **ENTER INDIVIDUAL STUDENT COMMENTS:** Text entered here will only appear on the selected student’s take home note. (The selected student must have an appointment scheduled before you can create an individual student note.)
- ii. **ENTER CLASS NOTE:** Text entered here will print on all your students’ take home notes (even those that have an INDIVIDUAL STUDENT NOTE from above). (This note will only appear on the take home notes for students with an appointment scheduled at the time the note is created. It is recommended that teachers create this note on the last school day or two before the conferences begin.)
- iii. **PRINT TAKE HOME NOTES:** Notes can be printed for a specific student or for all students that have an appointment. *End*

Using the
system