

Conference Scheduling- Calendly

Contents

Overview	2
Sign up for an Account	2
Set up Your Event (for the first time)	6
Maintaining and/or Setting up a New Event	10

Overview

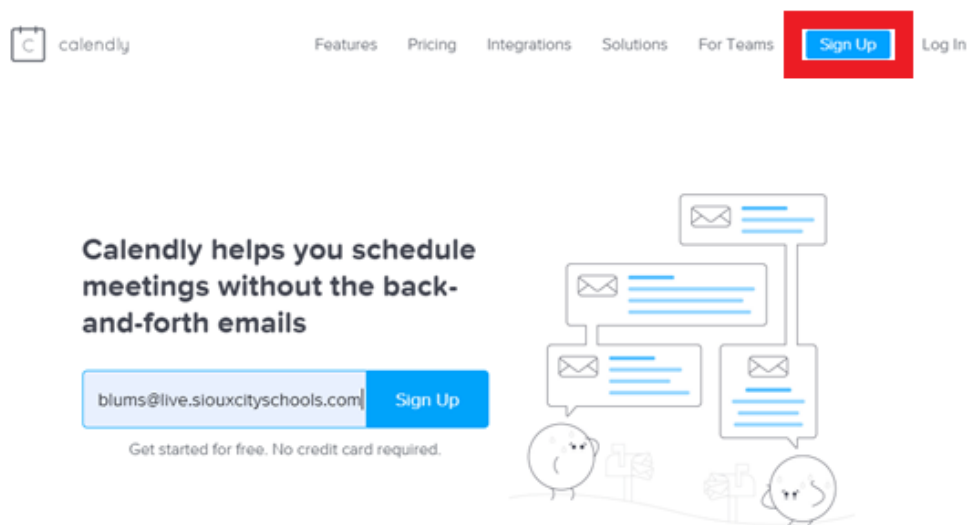
Historically, parent/teacher conferences have consisted of open times when parents could come to the school and walk up to a teacher (in the gym or their room) and discuss how their student is doing. COVID-19 and social distancing have introduced the challenge of needing to schedule parent meetings so they can be appropriately spaced out.

Calendly is a web-based software where a teacher can set up a personalized schedule of when they want to meet with parents and how long each meeting will be and provide a link to parents who can view open slots in that schedule.

This document will give you an overview of Calendly, how to create a login, how to link it to your Office 365 calendar, how to set up a schedule...

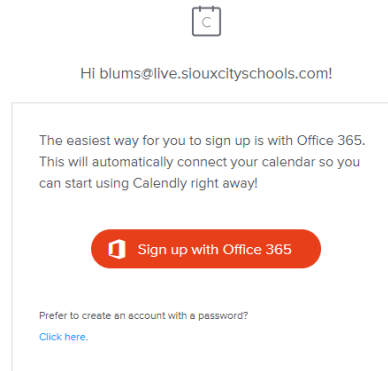
Sign up for an Account

Create a Calendly account by going to <https://calendly.com/>

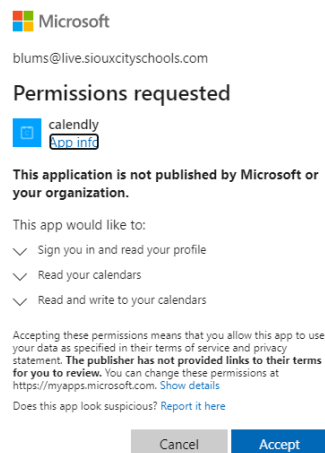


Enter your district email address (username@live.siouxcityschools.com) and click Sign Up.

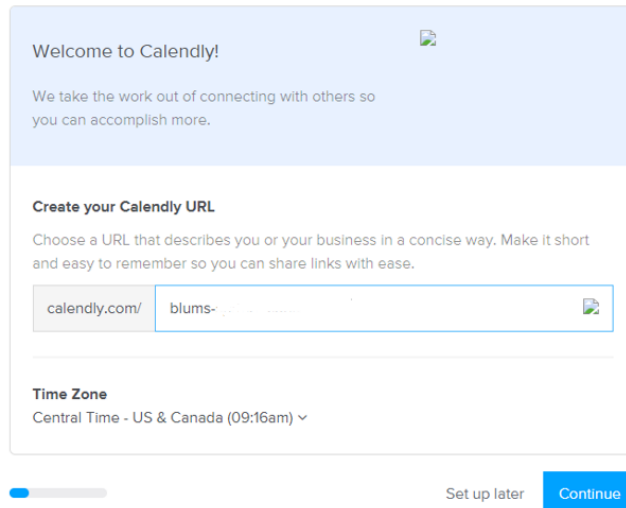
Click Sign up with Office 365 to link your Calendly calendar to your district calendar.



Follow the steps choosing Work or School account and enter your password and click accept.



You will be presented with the following screen. Name your Calendly URL. Your user name or combination of first and last name would be best. Click Continue.



Welcome to Calendly!

We take the work out of connecting with others so you can accomplish more.

Create your Calendly URL

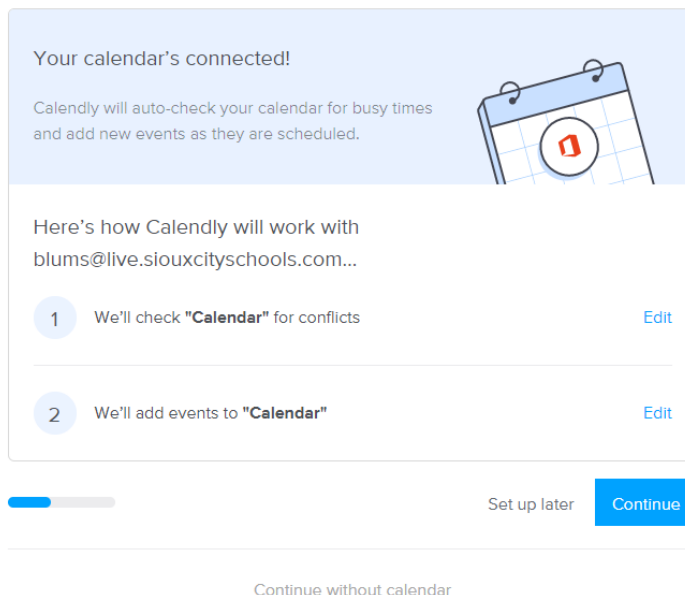
Choose a URL that describes you or your business in a concise way. Make it short and easy to remember so you can share links with ease.

calendly.com/ blums-

Time Zone
Central Time - US & Canada (09:16am) ▼

[Set up later](#) [Continue](#)

Next, you will see the following screen. Calendly will make sure you are not double booked for any conferences and add the families as soon as they choose a time slot. Click Continue



Your calendar's connected!

Calendly will auto-check your calendar for busy times and add new events as they are scheduled.

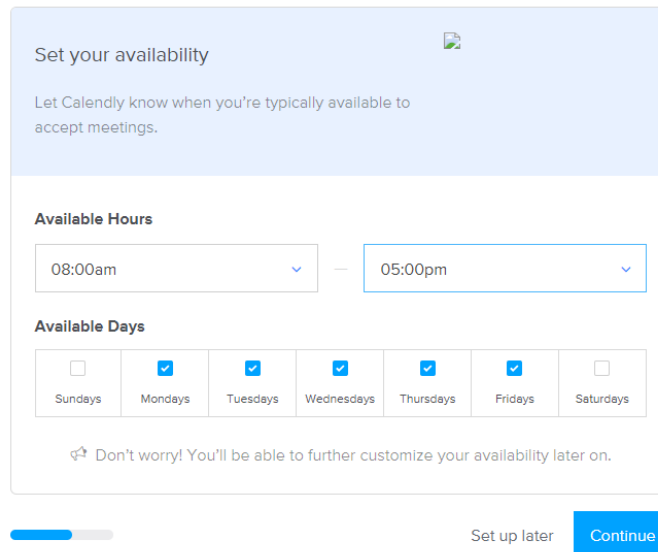
Here's how Calendly will work with blums@live.siouxcityschools.com...

- 1 We'll check "Calendar" for conflicts [Edit](#)
- 2 We'll add events to "Calendar" [Edit](#)

[Set up later](#) [Continue](#)

[Continue without calendar](#)

Your next screen can customize the times, but we can do that later so just click Continue here.



Set your availability

Let Calendly know when you're typically available to accept meetings.

Available Hours

08:00am — 05:00pm

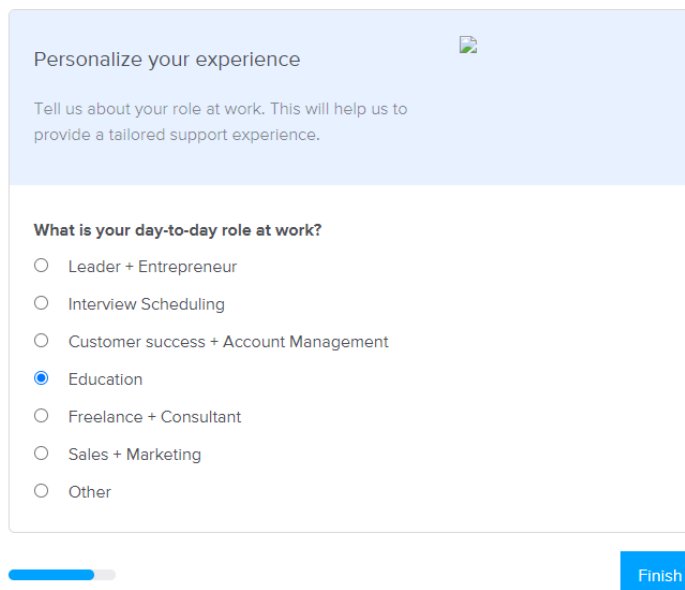
Available Days

☐ Sundays ☒ Mondays ☒ Tuesdays ☒ Wednesdays ☒ Thursdays ☒ Fridays ☐ Saturdays

🔔 Don't worry! You'll be able to further customize your availability later on.

Set up later [Continue](#)

The next screen you see will look like the following. Choose Education and click the Finish button!



Personalize your experience

Tell us about your role at work. This will help us to provide a tailored support experience.

What is your day-to-day role at work?

☐ Leader + Entrepreneur

☐ Interview Scheduling

☐ Customer success + Account Management

☒ Education

☐ Freelance + Consultant

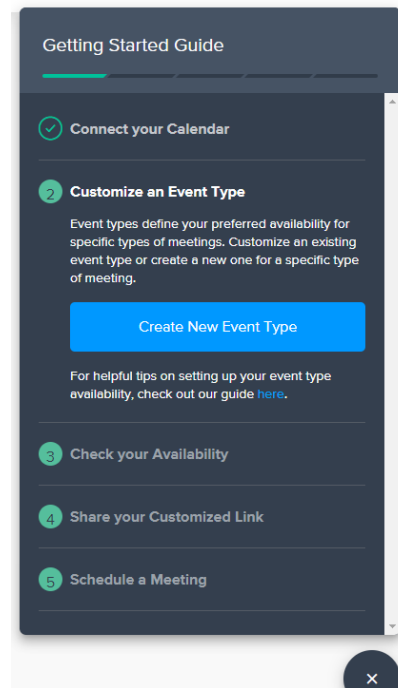
☐ Sales + Marketing

☐ Other

[Finish](#)

Set up Your Event (for the first time)

When you are done setting up, Calendly will place you in the “Getting Started Guide”. Create New Event Type to customize your conference schedule.





Name your event. Under Location you can add a location to include Teams and/or phone call to give your families options. Enter a description and instructions for your families. Pick an event color and then click Next. **Please note: In the instructions, instruct the parents to enter the STUDENT’s name when scheduling. If you have siblings from the same family, this will help you determine which student is being scheduled.**

Event name * [?]

Spring Conferences


Location [?]

 Microsoft Teams Edit X

 Phone call Edit X

[+ Add a location option](#)

Description/Instructions [?]




Please choose a time for your child's spring conference and indicate if you would like a phone or online conference. Thanks!

Event link * [?]


calendly.com/blums-spring_conferences/
spring-conferences

Event color * [?]



Cancel Next

Next, you will choose a date range by clicking on Within a date range and then selecting the days when the conferences will be held (for example, February 22 and 23, 2021 for Spring 2021 Conferences).


When can people book this event?
30 min, 60 rolling days

Cancel
Next

Date range
Invitees can schedule...

Set a range of dates when you can accept meetings.

☐ 60 calendar days into the future

☒ Within a date range Feb 22 – Feb 23, 2021

☐ Indefinitely into the future

Choose Set custom hours and then select only Monday and Tuesday for Spring Conferences. You can add time slots by clicking the plus sign + for that day. This is how you will make sure to schedule in your breaks and lunch. It is important to put these times in correctly, as it will block your calendar from conferences during these breaks.

How do you want to offer your availability for this event type?

Select one of your schedules or define custom hours specific to this type of event.

Use an existing schedule
Set custom hours

Central Time - US & Canada
Save as new schedule

Set your weekly hours

Add date overrides

☐ SUN Unavailable

☒ MON

8:00am - 10:00am

10:10am - 11:50am

12:20pm - 2:20pm

2:30pm - 5:30pm

☒ TUE

3:40pm - 6:20pm

☐ WED Unavailable

☐ THU Unavailable

Add dates when your availability changes from your weekly hours



Next, choose a Duration and enter 20 minutes under custom duration. Skip Buffers. Choose 20 minutes for Start time increments. You can also select Scheduling conditions if you would like to limit the time frame that families can schedule a conference (minimum amount of notice). You may want to make this 24 hours or more if you do not want families to schedule their conferences the weekend before the event. Click Next.

Duration

Define how long your event will be. It can be as long as 12 hours.

Choose a duration

☐ 15 min ☐ 30 min ☐ 45 min ☐ 60 min

...or choose a custom duration

☒ 20 min ☐

Buffers ?

Allocate time before or after the event that you can use to prepare for or wrap up from the event.

Before event**After event**

0 min ☐

0 min ☐

Additional rules for your availability ☐**Start time increments**

Set the frequency of available time slots for invitees.

Show available start times in increments of...

20 min ☐

Scheduling conditions

Set the minimum amount of notice that is required and how many events are allowed per day.

Invitees can't schedule within...

4 hours ☐ of an event start time.



You can now send the Calendly link to your families to schedule conferences. You can also click on “view live page” to see what has been scheduled.

Invitee language - English

Last edited January 21, 2021.

view live page

What event is this?

Spring Conferences

When can people book this event?

20 min, Feb 22 - Feb 23, 2021

Spring Conferences is ready to accept events.

https://calendly.com/blums-spring_conferences/spring-conferences

Additional Options

Invitee Questions

Name, Email, Location + 1 question

Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

Notifications and Cancellation Policy

Calendar Invitations, No Reminders

Confirmation Page

Calendly confirmation page, no active links

Collect Payments

no payment method

Page 9

Maintaining and/or Setting up a New Event

Now that you have an account, you can come back to Calendly and review and/or change settings (for example, to set up another conference. When you log back into Calendly you will see the following home screen.

To create a new event, click on the “New Event Type” button (red box) and you will be led through screens similar to above. Please note that using the free version of this tool only allows for you to have one event time live at a time. To enable only one event, you toggle the event on or off by clicking on the gear icon in the event and then toggle the On/Off switch (green boxes).

