Conference Scheduling- Calendly

Contents

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…
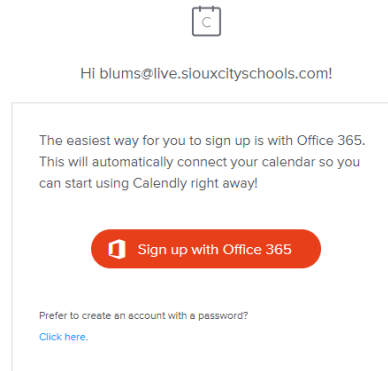
Sign up for an Account

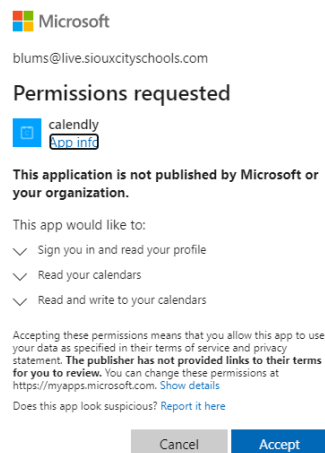Create a Calendly account by going to https://calendly.com/
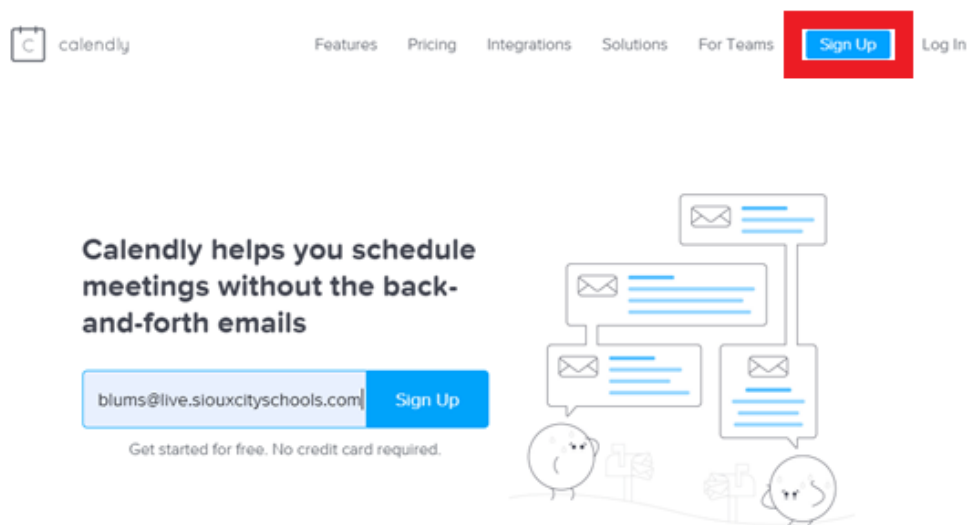
Enter your district email address (username@live.siouxcityschools.com) and click Sign Up.
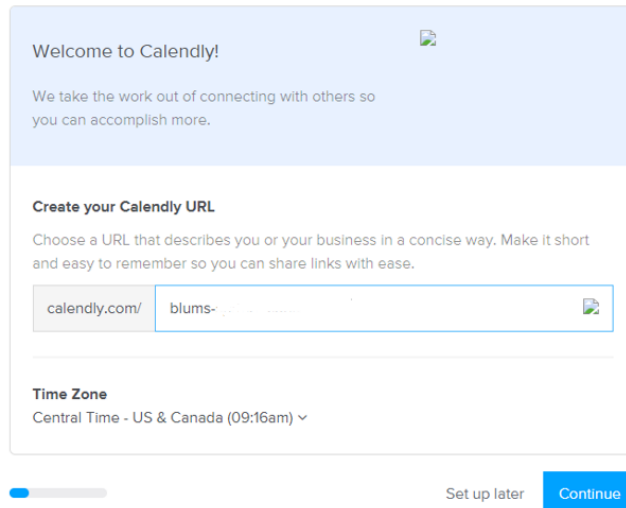
Click Sign up with Office 365 to link your Calendly calendar to your district calendar.

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.

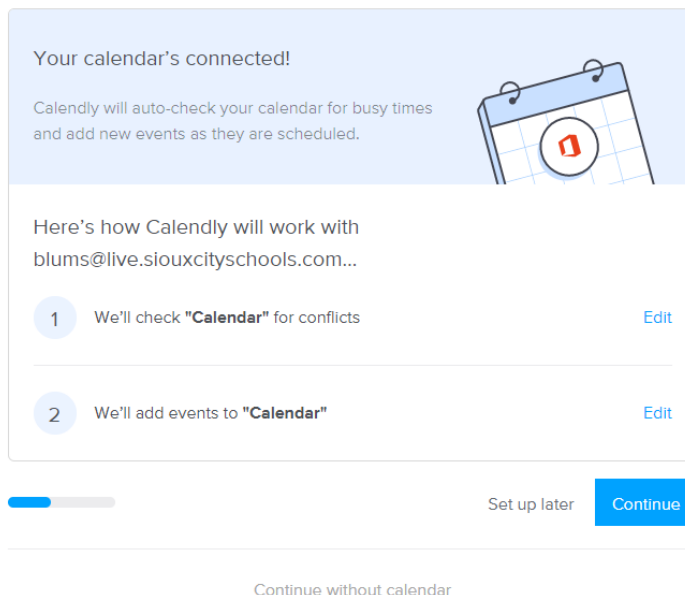**Create your Calendly URL**

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!

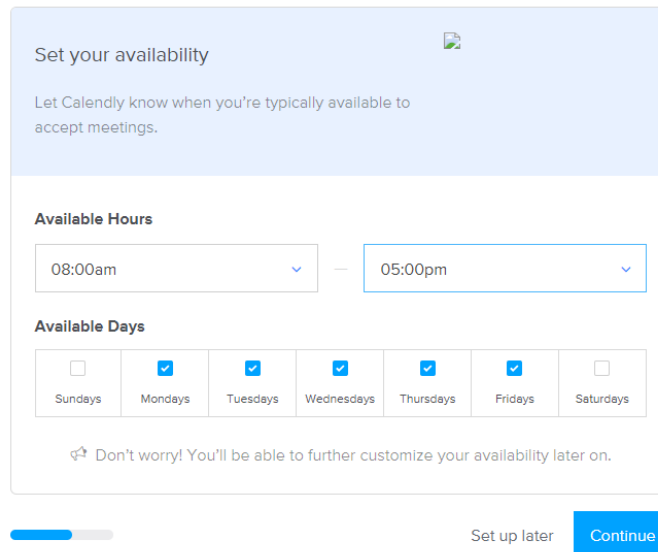Calendly will auto-check your calendar for busy times and add new events as they are scheduled.

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.
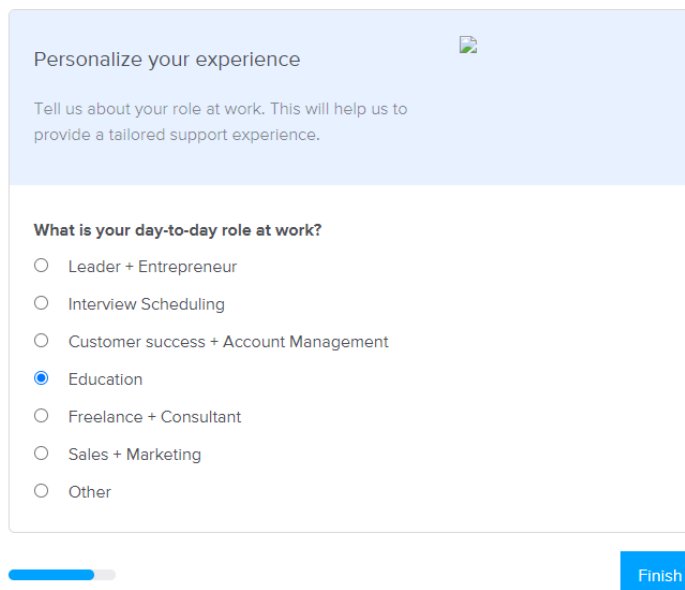
Available Hours

| 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
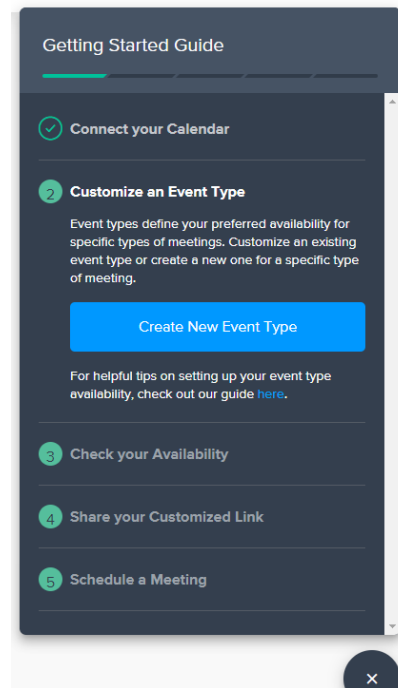◉ Education
○ Freelance + Consultant
○ Sales + Marketing
○ Other

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. <mark>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.</mark>

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).

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.

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

Choose a duration

○ 15 min   ○ 30 min   ○ 45 min   ○ 60 min

...or choose a custom duration

● | 20 | min ⌄ |

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

Buffers (?)

Before event   After event

| 0 min ⌄ | | 0 min ⌄ |

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

Additional rules for your availability ⌄

Start time increments

Show available start times in increments of...

| 20 min ⌄ |

Set the frequency of available time slots for invitees.

Scheduling conditions

Invitees can't schedule within...

| 4 | hours ⌄ | of an event start time.

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

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.

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).