

Daily Facility Use Ops Guide for Pre-Approvers

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Site-Based Daily Operations Guide

For site approvers, pre-approvers, EA Plus users, calendar managers, and other site-level administrators

Purpose of This Guide

This guide helps site-based staff manage the daily operational responsibilities associated with facility scheduling and community use in Facilitron. It is intended for staff who:

- Maintain site calendars.
- Enter school and district activities.
- Review community reservation requests.
- Provide site-level pre-approval.
- Review requested reservation changes.
- Communicate with renters, district administrators, and Facilitron.
- Coordinate facility access, staffing, equipment, and support services.
- Help ensure that approved events can be carried out safely and successfully.

This guide does not replace district policy. Site staff should always follow the facility-use policies, fee schedules, approval requirements, and escalation procedures established by your organization.

Depending on your assigned Facilitron permissions, you may be responsible for:



Maintaining the site's facility calendar.



Creating internal reservations.



Creating maintenance or availability blocks.



Reviewing requests submitted by community organizations.



Confirming that requested facilities are available and appropriate.



Identifying required custodial, security, HVAC, equipment, or other support.



Providing site-level pre-approval.



Marking requests "Not OK" when the site cannot accommodate them.



Reviewing renter-submitted changes and cancellations.



Adding setup instructions.



Communicating through reservation comments.



Escalating policy questions to district administrators.



Alerting Facilitron when platform or account support is needed.

For detailed instructions on using individual Facilitron features, follow the support links included throughout this guide. "Follows district workflow or hierarchy for final approval. Does not provide district final approval"

Understanding Your Role

PA, EA, and EA+ users are typically assigned to one or more sites and participate in the pre-approval process. Their common operational focus is availability, safety, staffing, services, and accurate calendar information. Exact buttons and actions can vary by district configuration and assigned permissions.

Role	Primary site responsibility	Typical actions	Important boundary
PA	Pre-approval review	OK / Not OK / Leave Note; comments; review changes	Does not provide district final approval
EA	Site-level reservation management	Pre-approval plus permitted site-level edits and coordination	Actions depend on account configuration
EA+	Expanded site-level access	EA functions plus access to Administrative Action Required items where enabled	Follows district workflow or approval hierarchy

Daily Operations Guide for Pre-Approvers cont.

Detailed role information:

- [Your Role as a School Site Administrator](#)
- [What Do I Need to Know?](#)
- [Internal Reservations vs. External Reservations](#)

Daily Operations at a Glance

Site-based administrators should complete the following workflow each business day.

Start of Day	Throughout Day	End of Day
• Open the Facilitron dashboard. • Review requests waiting for your action. • Review change and cancellation requests. • Review new reservation comments. • Confirm today's events. • Review upcoming events. • Check for internal activities or closures that need to be added to the calendar.	• Review new reservation requests. • Provide pre-approval decisions promptly. • Respond to change requests. • Update internal reservations and facility blocks. • Add or revise setup instructions. • Communicate through reservation comments. • Coordinate with district staff and site support teams. • Alert Facilitron when platform-related assistance is required	• Check for urgent requests still awaiting action. • Review the next business day's events. • Confirm that schedule changes have been entered. • Make sure unresolved issues have been assigned to the correct person or department. • Notify affected staff of significant changes.

Using the Dashboard

The dashboard should be the first page site administrators review each day. It provides a summary of reservations, upcoming activity, comments, and items requiring admin action. Use the dashboard to monitor:

- Requests waiting for your pre-approval.
- Recently submitted requests.
- Upcoming approved events.
- Reservation comments.
- Change requests (Administrative action item).
- Cancellation requests (Administrative action item).
- Reservation status.
- Calendar activity.

Best practice

Use the eye icon to hide comments you have already reviewed and keep the Recent Comments widget focused on items needing attention. Hiding a comment does not delete it—you can view it again by selecting Show Hidden or opening the reservation.

Daily Dashboard Priorities

Review dashboard items in this order:

1. Administrative Action Required

- Address change requests, cancellation requests, and time-sensitive items first. These may affect staffing, access, support services, or events already on the calendar see Figure A1).
- See [Using the Dashboard—Administrators](#)

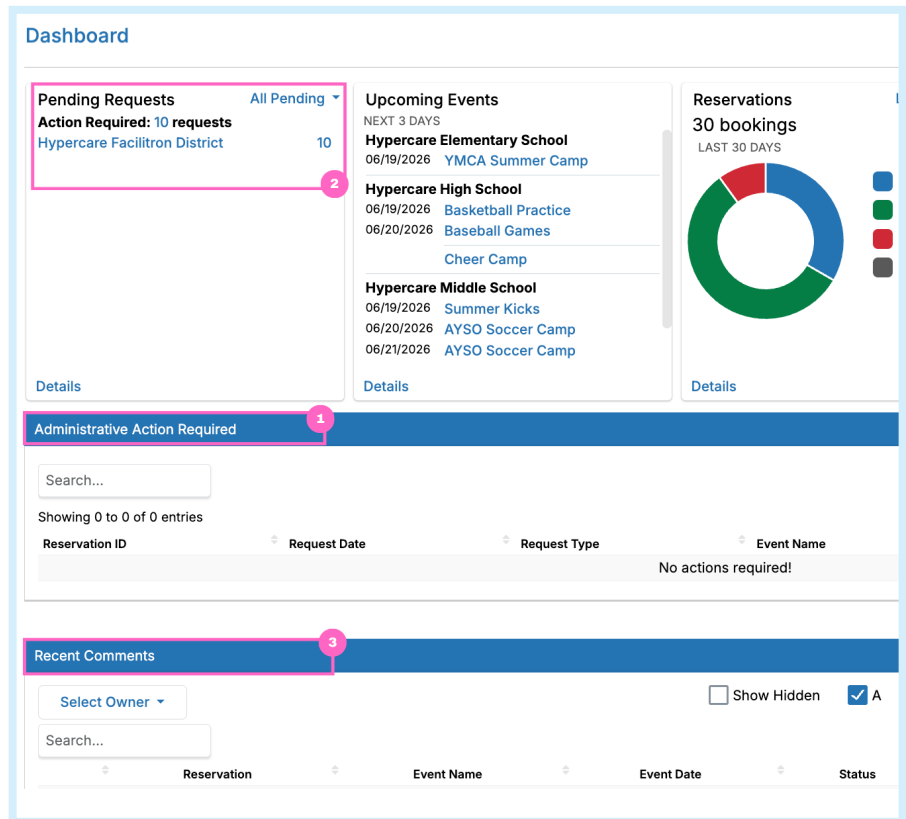
2. Pending Reservations

- Review reservations awaiting your site-level decision (see Figure A2). Sort by Age and Days till Use. Best practice in the source guide is to respond within five days of submission and no later than two weeks before the event.
- See [Pre-Approving Reservations for Administrators](#)

3. Recent Comments

- Look for renter questions, district instructions, Facilitron responses, and operational updates (see Figure A3). Respond to questions and updates in the reservation record rather than moving the conversation to email.
- See [Commenting on a Reservation—Administrators](#)

FIGURE A



When internal staff need to know how to enter a schedule

Before staff members can enter their schedules in the Facilitron system, Full Access users (FA) must add them as internal users. Internal staff should not create their own accounts.

[Adding Staff/Users to Your Account](#)

Once an internal user is added to Facilitron, forward them the following directions:

[Entering a Schedule](#)

When community renters need to know how to enter a reservation request

Forward the following directions:

[Entering a Reservation](#)

If you need to change a renter on a reservation, see below:

[How to Change Renter on a Request](#)

Reservation Management

Locating Pending Requests

Pending requests require review by assigned pre-approvers before they can move forward to final approval.

You can access pending requests:

- From the **Pending Requests** dashboard widget (see Figure A2)
- By selecting **Reservations** → **Pending** on the left sidebar (see Figure B)

Responding to a Request

1. Open the Reservation Details page.

Click the **blue reservation number** (see Figure B) to open the reservation and review its full details before responding.

2. Review the reservation details.

Confirm that the requested facility, date, time, and other reservation information are appropriate and that the request can be accommodated.

3. Choose your response.

In the Pre-Approvers section, select:

-  **OK** if you can accommodate the request.
-  **Not OK** if you cannot accommodate the request.

4. Add your comment.

After selecting OK or Not OK, enter a comment and submit your response. **If you select Not OK, you will also be asked to choose a reason.**

5. The request moves forward for final review.

Your response is a **pre-approval**, not the final decision. The reservation remains pending until a final approver approves or declines it.

Need more details? See the [Pre-Approving Reservations for Administrators](#) support article for full step-by-step instructions.

Responding to a Change Request

1. Open the reservation

Click the blue hyperlinked reservation ID

2. Click Review Change Request

FIGURE B

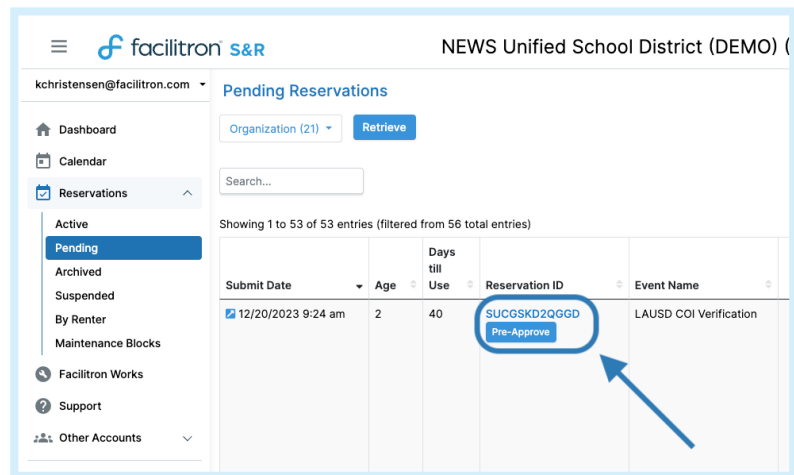
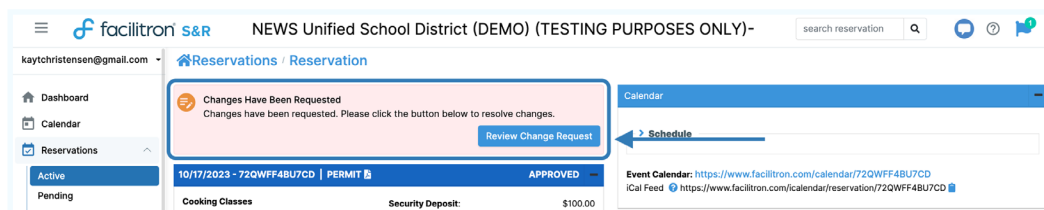


FIGURE C



On the reservation details page, click **Review Change Request** in the red banner at the top of the page (see Figure C).

3. Review the requested change

A pop-up will show the requested changes, such as dates being added, moved, or removed.

4. Respond to change request

- OK entire reservation if the change can be accommodated.
- Not OK entire reservation if it cannot be accommodated.
- Leave Note if you need to provide information without approving or declining.

Then click **Submit**.

Important note: While an automated change request is pending, the reservation is locked. No manual adjustments, suspensions, or cancellations can be made until the request is resolved. [See full guide.](#)

Canceling a Reservation

Use the Cancel function when a renter requests to cancel. If your site can not accomodate a request, use Decline.

1. Open the reservation.

Navigate to the Reservation Details page for the reservation you need to cancel.

2. Select Cancel Reservation.

On the left side of the Reservation Details page, click Cancel Reservation, located beneath the Pre-Approver and Setup Instructions sections.

3. Add a comment, if needed.

You can enter a comment explaining the reason for the cancellation. Any comment entered will be saved in the reservation's Comments section and included in the cancellation email sent to the renter.

4. Submit the cancellation.

Click Submit to complete the cancellation.

5. Confirm the status.

The reservation status will update to Cancelled, and notification emails will be sent to the renter and applicable administrators.

Important: Pending or Approved reservations may be cancelled if your assigned role permissions permit. If an automated change request is currently awaiting review, it must be resolved before the reservation can be manually cancelled. See [How to Cancel a Reservation – PA and EA Administrator Roles](#) for full instructions.

Maintaining an Accurate Calendar

An accurate calendar is the foundation of the reservation process. Community users may submit requests based on the availability displayed in Facilitron. Site staff should therefore ensure that school activities, internal programs, closures, and other unavailable periods are entered promptly.

Add all known activities that occur outside of the regular bell schedule to the Facilitron calendar, including athletics, practices, performances, testing, school events, holidays, and other non-instructional activities. A complete and up-to-date calendar helps reduce scheduling conflicts, improves visibility across departments, and ensures renters see accurate availability. Note: Use maintenance blocks only for maintenance and repair work.

Related Support Articles:

- [Finding My School or District's Calendar](#)
- [Customizing and Saving Calendar Views](#)
- [Creating an Internal Reservation](#)
- [Creating an Internal Schedule With Multiple Dates](#)
- [Creating Maintenance Blocks](#)

Create a Single-Date Internal Reservation

1. Log in at www.facilitron.com and select your school/facility site.
2. Navigate to your **calendar** on the left-hand side of your dashboard (see Figure D).
3. Click **" + Event "** on the top right corner of the calendar page (see Figure E).

FIGURE D

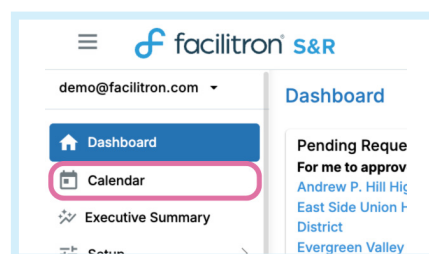


FIGURE E

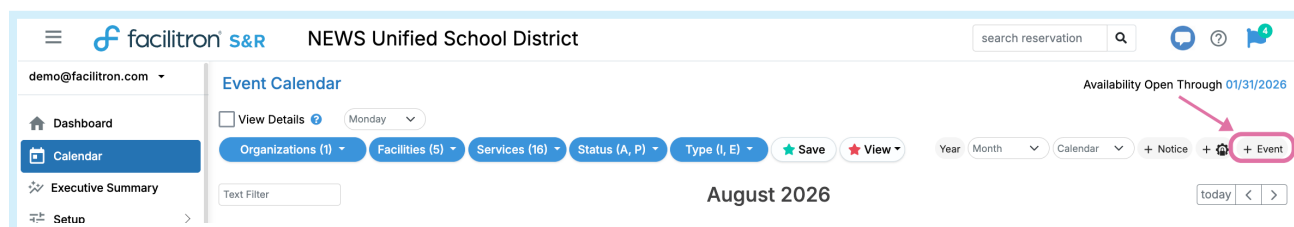


FIGURE F

4. Enter Event Details (shown in Figure F).
 - The following are required fields: **Event Name** and **Number of attendees** (estimate is fine).
5. Select the Facility by searching by name or use the area dropdown.
6. Choose **date, start time and end time**.
7. Click **"Add to Schedule"**
8. Click **"Submit Schedule"**
 - If prompted, answer the internal application questions and/or select optional equipment or services. Click **"Proceed"**.
9. Reservation ID will appear once complete. You may click the ID to review reservation details (see Figure I).

Create a Multi-Date Internal Schedule

1. Log in at www.facilitron.com and select your school/facility site.
2. Navigate to your **calendar** on the left-hand side of your dashboard (see Figure D).
3. Click **" + Event "** on the top right corner of the calendar (see Figure G).
4. Enter Event Details (shown in Figure G).
 - The following are required fields: **Event Name** and **Number of attendees** (estimate is fine).
5. Select the Facility by searching by name or use the area dropdown.
6. Choose the first **date, start time and end time** and enable **"Multiple Dates"** (see Figure G).
7. If the schedule will **not** repeat on a weekly or bi-weekly basis, change the **"Frequency"** drop down to **"Pick My Dates"**. This will allow you to apply the currently selected facility and time slot to any dates you choose.
 - (Optional) Check **"Offsite Activity"** for away games or off-campus events. Note: In order to schedule an offsite activity, there must first be an existing event date at the site included on the schedule. Offsite events cannot be scheduled independently.

FIGURE G

FIGURE H

8. Repeat for additional dates/ facilities as needed.
9. Review and Click **"Submit Schedule"** (see Figure H)
 - If prompted, answer the internal application questions (this varies on a district-by-district basis) and/or select optional equipment or services. Click **"Proceed"**.
10. Click **"Submit"** and **Your Reservation ID will appear** (see Figure I)- click it to review

FIGURE I

Create a Sibling Reservation

What is a sibling reservation?

A sibling reservation is an internal request submitted by one campus for space at another campus in the same district. For example, Campus A may submit a request to use Campus B's auditorium.

How to submit a Sibling Reservation

1. The process is nearly the same as creating an internal reservation:
2. Open your campus calendar and select **+ Event**.
3. In the event pop-out, open the **Organization** dropdown.
4. Select the sister campus where the event will take place.
5. Select the facility, date, and time.
6. Complete the remaining event details.
7. Submit the schedule.

The key difference is the **Organization** selection. Choose the campus whose facility you want to request before selecting the space.

See the support article, [How to Create & Find Sibling Reservations in S&R](#), for more information.

Communicating About a Request

Commenting on Reservations

Use the comment section for tracking incidents, coordinating details, and documenting changes. Tip: Use the blue back arrow or click the eyeball to hide handled comments. Then, click "show hidden" to bring those comments back into view if needed (see Figure J). See [Commenting on Reservations](#)

Communicating Issues

Examples that require documentation:

- Group overstays reservation
- Excessive mess or damage
- Support staff need to stay late

FIGURE J

Reservation	Event Name	Event Date	Status	Latest Comments	Owner
BFN4CMFGPUAB	Dance Recital/Showcase	06/29/2025	A	06/17/2025 1:39 pm - Maria Garcia: RENTER- PLEASE PROVIDE PRIVATE...	Maria Garcia
SJA7WYSG72E5	VBS/Kids Camp	06/23/2025 - 06/26/2025	A	06/16/2025 5:20 pm - Maria Garcia: RENTER- PLEASE PROVIDE PRIVATE...	Maria Garcia
GR9RJQACH4CJ	BCR Spring Season	02/13/2025 - 05/30/2025	A	06/16/2025 2:54 pm - Maria Garcia: CONFIRMED WITH MAIN PC- JESSE Z...	Maria Garcia
25G2ZHYMNDNS	Long Course Swim Meet	06/21/2025 - 06/22/2025	A	06/17/2025 11:08 am - Maria Garcia: JUSTIN B. PLEASE CONFIRM...	Maria Garcia
GCM9F4USKUKB	Measure C Community Meeting	06/25/2025	C	06/17/2025 10:16 am - Riz & The Facilitron Team: Hi Justin, Our refund team...	Maria Garcia
KTE7ZWR9MAWO	FUSD CURRICULUM- K-6 Adoption	08/13/2025 - 08/14/2025	A	06/17/2025 10:15 am - Riz & The Facilitron Team: Hi Maria, Our refund team...	Maria Garcia
43YKQSTHUIHX	ACT Exam	06/14/2025	A	06/16/2025 3:00 pm - Maria Garcia: FACILITRON- PLEASE REACH OUT TO...	Maria Garcia
K3NG2SPG3U9M	Fresno PAL Defenders Basketball League	06/21/2025 - 07/19/2025	A	06/16/2025 2:55 pm - Maria Garcia: CONFIRMED WITH MAIN PC- JESSE Z...	Maria Garcia
				06/16/2025 5:22 pm - Maria Garcia: CANCELED- PER RENTER ON 6/4/25;...	Maria Garcia
				06/17/2025 2:37 pm - Maria Garcia: APPROVED- PER PRINCIPAL GILBERT...	Maria Garcia
				06/16/2025 11:39 am - Maria Garcia: PER BRENDA YEPEZ WITH ACT...	Maria Garcia
				06/17/2025 1:40 pm - Maria Garcia: RENTER- PLEASE MAKE FULL PAYMEN...	Maria Garcia
				06/16/2025 3:50 pm - Maria Garcia: RENTER- PLEASE MAKE FULL PAYME...	Maria Garcia

What to do:

8. **Add a comment** on the reservation with full details
9. Upload any relevant photos to the **Documents** section (shown in Figure F)

Need to contact Facilitron?

If you see an issue (missing facility, outdated staff info, incorrect name, etc.), submit an **internal Facilitron Alert** with the correct info. See [Using Facilitron Alert](#)

Communication Templates

Use these templates to communicate clearly and consistently with renters about common reservation issues. Customize each message with the specific details of the request before sending.

To introduce an organization or renter to the district's facility use process.

Thank you for your interest in using [District/Organization Name] facilities. Facility use requests are submitted and managed through Facilitron, where you can view available spaces, submit reservation requests, upload required documentation, and track the status of your request.

Please keep in mind that submitting a request does not guarantee approval. Your reservation is confirmed once all required reviews and approvals have been completed.

To renter when site cannot host

Unfortunately, this site is unable to accommodate your reservation request at this time. If you'd like to explore alternative locations, please visit www.facilitron.com or call Facilitron Support at 800-272-2962 for assistance in finding a new venue.

We apologize for the inconvenience and appreciate your understanding.

A renter asks why a request has not been approved yet.

Your request for [Facility/Site] on [Date] is still moving through the review process. Reservations may require review by the site, district, or other departments before they can be finalized.

You can continue to check your reservation in Facilitron for updates. We appreciate your patience while the necessary reviews are completed.

The administrator cannot make a decision without additional details.

Before we can continue reviewing your request, we need a little more information about your event. Please provide the following: [information needed].

You can add the information to your reservation or reply through the reservation comments. Once received, we can continue the review process.

Best practice

Keep communications clear, timely, and specific to the reservation. Whenever possible, use Facilitron reservation comments so important details and decisions stay connected to the request.

To renter when facility cannot accomodate request for reasons other than availability.

After reviewing the details of your request, we're unable to accommodate this event at [Site/Facility].

This may be due to [staffing/facility limitations/event requirements/district policy]. If appropriate, you may want to explore another facility or adjust the event details before submitting a new request.

When Custodial, security, HVAC, equipment, or other support affects the reservation.

Based on the details of your event, additional support may be required, such as [custodial/security/HVAC/other].

These requirements may affect the final cost or approval of your reservation. Please watch your Facilitron reservation for updates as the request continues through review.

When dates, attendance, setup, facilities, etc. need to be corrected before approval.

We noticed that some information on your reservation needs to be updated before we can complete our review.

Please update [specific item] to reflect [needed change]. Keeping your reservation details accurate helps ensure that the appropriate space, staffing, and services can be reviewed for your event.

To reinforce expectations after an issue or simply closing the loop.

Thank you for using [Facility] for your recent event. We appreciate your partnership and wanted to share a quick reminder for future reservations regarding [specific expectation or issue].

Going forward, please [specific action needed]. This will help our team prepare the facility appropriately and support a smooth experience for your group and other facility users.

To internal staff when facility details have changed.

We've had a change to [Facility/Space] that may affect future facility-use requests: [Brief description of change.]

Please keep this in mind when reviewing or planning upcoming events. If this change should also be reflected in the facility information shown in Facilitron, please make sure the appropriate administrator or support team is notified.

Frequently Asked Questions

Why is my internal event still pending?

Internal events created by a Pre-Approver (PA) are not automatically approved. They remain pending until an Enhanced Access Plus (EA+) user or Facility Administrator (FA) provides final approval. Check the reservation details for its current status and approver.

What if I need to change my pre-approval?

As long as the reservation is still pending:

1. Go back to the reservation details page
2. Click the opposite option (OK or Not OK) to update your decision

Once the district gives final approval, changes can no longer be made. After you weigh in, the reservation moves on to the district's final approval step. Your prompt pre-approval helps ensure events are scheduled on time.

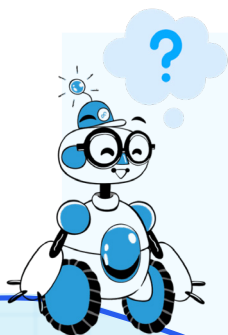
How do I validate a Certificate of Insurance (COI) myself?

Please refer to these two support articles for an in-depth process of COI verification: [Identifying and Reading a COI for Administrators](#) and [Steps to Verify/Invalidate a COI After OCR Scan](#)

What training resources are available for district staff?

Facilitron provides several resources to support district scheduling staff. Administrators have access to the [Facilitron Support Site](#) 24/7, where you can find help articles, FAQs, and training materials at any time. You may also chat with support online by clicking the blue chat widget in the bottom right hand corner of the support page (see Figure H).

District staff are also encouraged to attend a [live online training session](#), offered every Wednesday at 9:00 AM PT / 12:00 PM ET. These sessions are a great opportunity to learn best practices, review workflows, and ask questions in real time.



Need Help?

For additional assistance, contact Facilitron Support:

- (800) 272-2962
- support@facilitron.com
- Live chat at support.facilitron.com

SCAN FOR
SUPPORT



Download the Facilitron S&R App

Whether preparing for the next event or responding to changes throughout the day, the Facilitron S&R app gives custodial teams, facilities staff, campus supervisors, and other district employees instant access to schedules, reservation details, and event information, helping them stay informed, stay prepared, and keep operations running smoothly from anywhere.