



Daily Facility Use Ops Guide for Admins

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Daily Workflow Overview

Use this section as your daily guide for managing reservations. A quick morning review keeps your site's schedule accurate and prevents last-minute issues.

Start Your Day: Dashboard

Step 1: Address Administrative Action (if any required).

These are related to Approved requests, so they should be addressed as quickly as possible. EA+ staff also have access to address these.

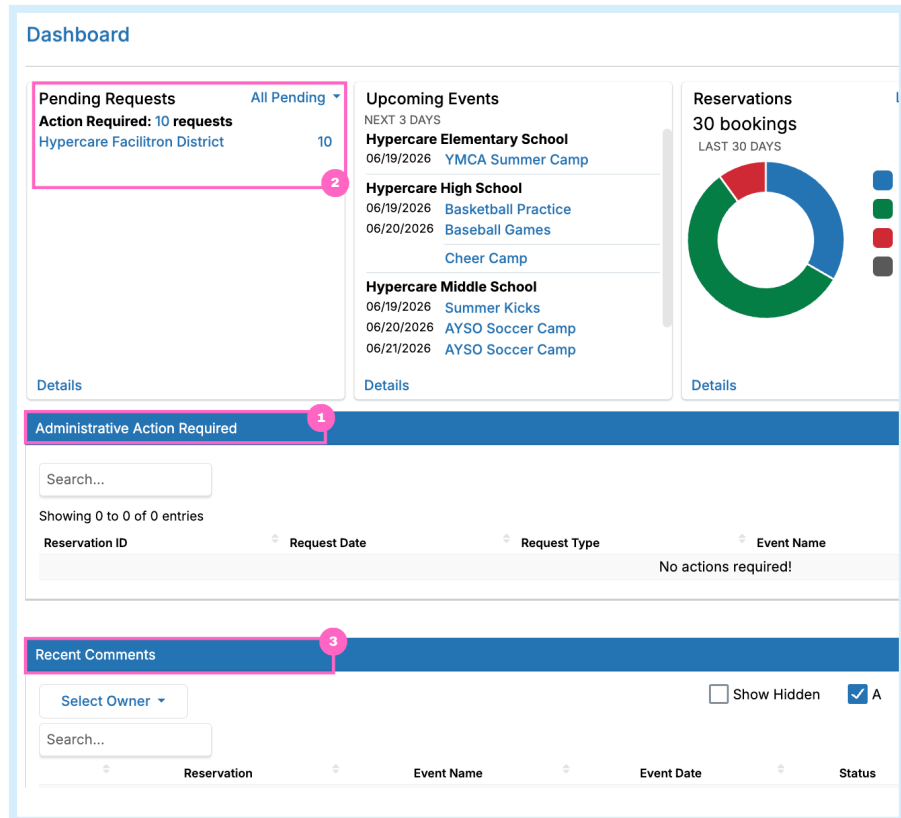
FIGURE A

Step 2: Review Pending Requests

Filter by days till use and age. Best practice is to approve requests within 5 days of submission and no later than 2 weeks prior to the start of the event. Use columns Age and Days till Use to help manage this standard.

Step 3: Check Recent Comments Section

Keeping this section up to date will ensure you quickly address questions & updates from staff and renters. Using this module will also help replace email usage (see 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](#)

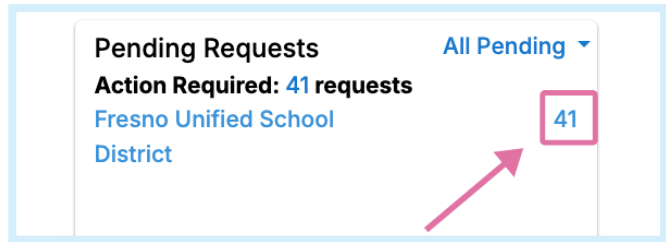
Reservation Management

Dashboard Tools

- **Pending List:** On the **Dashboard**, click on the blue cumulative number of pending requests in the first box (see Figure B).

Tip: Uncheck "hide suspended" at top to see all.

FIGURE B



Pending by "pre-approved" at the site level:

1. Click "**Pre-approvers**" until green thumbs appear.
2. **Go to the Reservation Details Page** to ensure the services and fees are correct.
3. Approve directly or click into the reservation to confirm services/fees.

[Approving Reservations \(Office of Facility Use\)](#)

[Pre-Approving Reservations \(Site Admins\)](#)

Pending by "declined" at the site level:

1. Click "**Pre-approvers**" until red thumbs appear.
2. Review and officially decline on the reservation detail page.

Note: If a site declines a community rental due to internal events, make sure school activities are entered in Facilitron to properly block the calendar.

[Creating an Internal Reservation Guide](#)

Reservation Detail Page: What You Can Do

The [Reservation Details Page](#) serves as the central hub for all information and communication related to a scheduled event. Here's an article about [Navigating to the Reservation Details Page](#) where you can make direct updates to a reservation. Updates may involve:

- [Changing a Renter on a Reservation](#)
- [Removing Date\(s\) or Timeslots From a Reservation](#)
- [Editing Time, Location, or Equipment \(and Applying to Multiple Dates\)](#)
- [Adding or Changing Services and Equipment](#)
- [Adding Additional Facilities to a Reservation](#)

Agenda View: For Printing & Coordination

The agenda view of the calendar is the quickest way to see all events happening during a specific period of time and is especially helpful when assessing facility use during emergencies (like weather closures). You may also:

- Print upcoming events (agenda view only shows approved events)
- Coordinate services
- Review setup instructions

[Support Guide-Printing Agenda view](#)

Responding to Change Requests

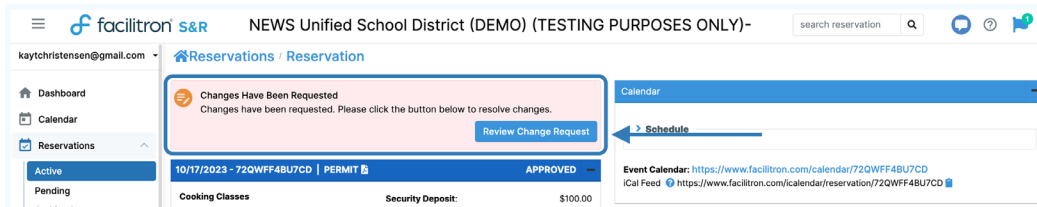
1. Open the reservation

Click the hyperlinked reservation ID from either an email notification or the Administrative Action Required section on the admin dashboard (see Figure C)

2. Click Review Change Request

On the reservation details page, click **Review Change Request** in the red banner at the top of the page.

FIGURE C



3. Review the requested change

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

4. If you are a pre-approver

Choose one of the following:

- 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** (see Figure D).

5. If you are approving or declining the request

Choose one of the following:

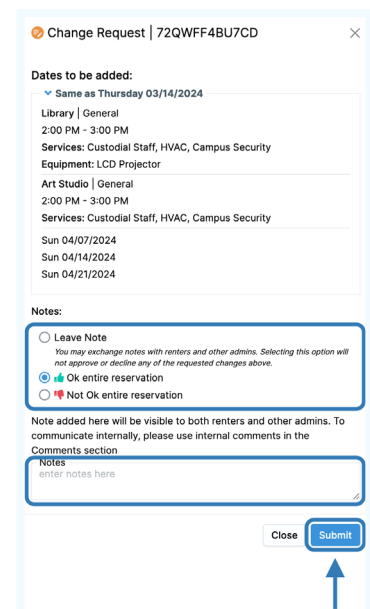
- Approve selected to approve the requested change.
- Decline this change request to reject the requested change.
- Leave Note if more information is needed before making a decision.

Then click **Submit**.

6. Know what happens after submission

- If approved, the change is automatically applied to the reservation.
- If declined, no changes are made.
- The request, notes, pre-approval decision, and final decision are recorded in the reservation's Comments/History section.

FIGURE D



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.](#)

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 E).

[Commenting on Reservations](#)

FIGURE E

Reservation	Event Name	Event Date	Status	Latest Comments	Owner
BFN4CMFGPUA8	Dance RecitalShowcase	06/29/2025	A	06/17/2025 1:39 pm - Maria Garcia: RENTER- PLEASE PROVIDE PRIVATE...	Robert High School
SJA7WY5G72E5	VBS/Kids Camp	06/23/2025 - 06/26/2025	A	06/16/2025 5:20 pm - Maria Garcia: RENTER- PLEASE PROVIDE PRIVATE...	Robert High School
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...	Robert High School
2SQCZHYMNDNS	Long Course Swim Meet	06/21/2025 - 06/22/2025	A	06/17/2025 11:08 am - Maria Garcia: JUSTIN B. PLEASE CONFIRM...	Robert High School
GCM9F4U5KUKB	Measure C Community Meeting	06/25/2025	C	06/17/2025 10:16 am - Riz & The Facilitron Team: Hi Justin, Our refund team...	Robert High School
KTE72WR9MAWG (I)	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...	Robert High School
43YKQSTHUHXX	ACT Exam	06/14/2025	A	06/16/2025 3:00 pm - Riz & The Facilitron Team: Hi Maria, We are currently...	Robert High School
K3NG2SPG3U9M	Fresno PAL Defenders Basketball League	06/21/2025 - 07/19/2025	A	06/16/2025 1:42 pm - Maria Garcia: FACILITRON- PLEASE REACH OUT TO...	Robert High School
				06/16/2025 2:55 pm - Maria Garcia: CONFIRMED WITH MAIN PC- JESSE Z...	Robert High School
				06/16/2025 5:22 pm - Maria Garcia: CANCELED- PER RENTER ON 6/4/25;...	Robert High School
				06/17/2025 2:37 pm - Maria Garcia: APPROVED- PER PRINCIPAL GILBERT...	Robert High School
				06/16/2025 11:39 am - Maria Garcia: PER BRENDA YEPEZ WITH ACT-...	Robert High School
				06/17/2025 1:40 pm - Maria Garcia: RENTER- PLEASE MAKE FULL PAYMEN...	Robert High School
				06/16/2025 3:50 pm - Maria Garcia: RENTER- PLEASE MAKE FULL PAYME...	Robert High School

Communicating Issues

Examples that require documentation:

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

What to do:

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

FIGURE F

Noticed an Error in Facilitron?

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

[Using Facilitron Alert](#)

Communicating with Internal Staff

These prewritten messages are designed to save time and ensure clear, consistent communication. It's a good idea to edit them to match your tone or the specifics of the event. When you approve or decline a reservation, simply paste the most appropriate message into the action comment box to notify site admins or renters.

To admin when reservation is past and still pending

This reservation is still showing as pending, but the event date has already passed. Please leave an internal comment confirming whether the event took place, if any support staff were present and whether any fees should be added.

If the event did not occur, I'll go ahead and cancel the reservation. If it did occur, I'll approve it and apply any necessary charges.

Thanks for your help in closing this out!

To admin who needs to pre-approve a reservation request

We're in the process of reviewing this reservation and need your input to move forward. Please click "OK" or "Not OK" to confirm whether the requested dates can be approved. Once you've responded, I'll coordinate with Facilitron to complete insurance and payment steps.

If you have any questions or concerns, please leave an internal comment on this reservation, and I'll be happy to assist.

Thank you for helping keep the calendar accurate and up to date!

To admin who declined an event because of school activities

Hello Site Admins,

I see this reservation was declined due to a conflict with school activities. Please remember that all internal events should be entered into Facilitron to ensure the external calendar accurately reflects availability for the community. This helps prevent scheduling conflicts and ensures transparency.

If you need assistance entering internal events, feel free to leave an internal comment here—I'm happy to send you a step-by-step guide and provide additional training if needed.

Thank you for your help keeping the calendar up to date!

Communicating with Renters

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.

To renter when reservation is approved – awaiting payment & COI

With Priority Language

Your reservation has been approved by the school site and now holds priority over any subsequent requests—except in cases of school use or emergencies as determined by the Site Administrator.

Please ensure that all payments and valid insurance documents are submitted prior to your first event date. Your permit is attached and will serve as your authorization to be on campus.

We look forward to hosting your event!

Standard Language with Deadline

Your reservation dates have been approved—we're excited to welcome you to campus!

To finalize your reservation, payment and a valid Certificate of Insurance (COI) must be submitted no later than # days prior to your first event date.

Please note: All reservations remain subject to change due to school activities. If you have any questions or need assistance, just leave a comment on this reservation and we'll be happy to help.

Your permit, located at the top of this reservation, will serve as your ticket to be on campus. Thanks, and have a great day!

Temporary Calendar Hold with Follow-up

We've approved the dates for your reservation and blocked the calendar to hold your spot.

Please note that payment and a valid Certificate of Insurance (COI) must be submitted at least # days before your first event date to keep your reservation active.

All reservations are subject to change based on school needs or activities. If you have any questions, leave a comment directly on this reservation and we'll assist promptly.

Your permit at the top of this reservation will serve as your ticket to be on campus. We look forward to your event!

To renter giving temporary approval only – internal calendars pending

Please note that the school site calendars for this year have not yet been finalized. We are temporarily approving the dates on your reservation to hold space on the calendar and prevent conflicts with other community groups.

School activities, however, take priority, and your reservation is subject to change once internal schedules are entered. We recommend checking back about one month before your event to confirm your dates.

To keep your reservation active, please submit payment and a valid Certificate of Insurance (COI) at least 10 days before your first event date.

If you have any questions or concerns, feel free to leave a comment on this reservation—we're here to help. Your permit, located at the top of this reservation, will serve as your authorization to be on campus.

Thank you, and we look forward to supporting your event!

To renter when reservation is approved, pending vendor paperwork

Your reservation dates have been approved, and the calendar has been blocked for your event.

Please note that all vendors associated with your reservation must submit the required documentation before your group is allowed on campus. This is necessary to ensure safety and compliance with district policies.

If you have any questions or need assistance, feel free to leave a comment on this reservation and we'll be happy to help. Your permit, located at the top of this reservation, will serve as your authorization to be on campus once all requirements are met.

Thank you, and we look forward to hosting your event!

To renter who receives grandfathered rates

Please note that the fees associated with your previous reservation(s) reflect your organization's grandfathered rate. These rates are no longer sustainable as outlined by our updated board policy because they do not cover the actual costs associated with community use of District facilities.

These rates will remain in effect for your group through July 1, 20--.

If you have any questions or need clarification, feel free to leave a comment on this reservation—we're happy to help. Thank you, and have a great day!

To renters after updating rental fees

Dear Community Partner,

[District Name] is committed to making school facilities available for responsible community use while ensuring that our buildings, fields, equipment, and staff resources are maintained for students, schools, and the broader community.

As part of that commitment, the District has completed a review of its facility use fee schedule and will be implementing updated facility use fees beginning **[Effective Date]**.

These updates are necessary to better reflect the actual costs associated with community use of District facilities, including custodial support, utilities, security, maintenance, administrative processing, insurance compliance, and long-term wear and tear. Every event has a cost, even when the space itself appears available. The District's goal is to ensure that those costs are managed transparently and responsibly, rather than being absorbed by instructional or operational budgets.

The new fee structure is designed to support:

- Clear and consistent pricing across all schools and facilities
- Fair treatment of community groups and facility users
- Responsible stewardship of taxpayer-funded public assets
- Continued access to District facilities for programs that benefit students and the community
- Long-term sustainability of District buildings, fields, and support services

This change is not about limiting community access. It is about preserving access by ensuring the facility use program is financially sustainable, consistently administered, and aligned with the District's responsibility to protect public resources.

The District will continue to review facility use requests in accordance with Board policy, administrative procedures, and applicable law. Groups requesting use of District facilities will receive updated pricing information through **[platform/process name]** before confirming future events.

We understand that fee changes may require planning, and we are committed to communicating clearly throughout this transition. Additional information, including the updated fee schedule and effective date, will be available at **[link/location]**.

Thank you for your continued partnership and for the many ways your programs contribute to our school community.

Sincerely,

[District Name / Department / Superintendent or Designee]

Frequently Asked Questions

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](#)

How do I add or delete a user?

To manage user roles, navigate to the **Setup** tab located on the left-hand side under **Calendar**, then select **Users**. You'll see a list of all users currently associated with the district account. If you'd like to manage users for a specific school, use the school dropdown menu in the top-right corner to select the appropriate school.

- To remove a user, click the red 'X' to the far right of their name.
- To edit a user's role, click the blue pencil icon.
- To add a new user, click the 'Add New User' button in the top-right corner. You'll need to provide their name, email, and phone number.
[Read full support article here.](#)

ProTip: To remind a new user to log in, click the red envelope next to the user's email address (see Figure G).

FIGURE G

Last Name	Email
& The Facilitron Team	 maramos@facilitron.com
& The Facilitron Team	 btantoco@facilitron.com

Why is it important not to use maintenance blocks for general scheduling?

[Maintenance blocks](#) are designed specifically for facility maintenance, repairs, cleaning, inspections, or operational closures that make a space temporarily unavailable for use. When maintenance blocks are used incorrectly, they can:

- Reduce transparency for staff and community users
- Create confusion during scheduling and conflict resolution
- Impact reporting accuracy and facility utilization data
- Limit opportunities for community access and cost recovery
- Make it more difficult for district staff to identify true maintenance needs

Best practice is to use maintenance blocks only for actual maintenance-related closures and to use the appropriate reservation, event, or internal scheduling tools for all other activities.

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.

If additional assistance is needed, administrators can always contact Facilitron Support directly by phone (800) 272-2962 or email at support@facilitron.com.

FIGURE H

