SmartFindExpress

Substitute User Guide

Version 2.5

May 2014

STATEMENT OF CONFIDENTIALITY

This information has been prepared for the express purpose of providing your organization with information about the functions and use of the eSchool Solutions SmartFind*Express* system. This material contains proprietary product information and may not be reproduced, used by, or disclosed to persons not in the employ of the recipient without the prior written consent of eSchool Solutions. **Company Confidential/Do Not Distribute – Do Not Post on Unsecured Web Sites (such as your district web site).**

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Before any features are available, you must register with the system and create a PIN. The Access ID and PIN are used for all interactions with the system.

Registering with the System

1. Call the system at 469-208-5567.
2. Enter your Access ID (six-digit employee ID), followed by the star (*) key.
3. When the system asks for your PIN, enter your Access ID again, followed by the star (*) key.
4. You will be asked to record your name. Record your name and when you have finished recording, press the star (*) key
5. Create your PIN. Enter the PIN you want to use followed by the star (*) key. The PIN must be numeric, must meet the minimum length requirements for your system and cannot be more than 9 digits.
6. Next you will hear your callback number. This is the telephone number the system will use to call you. If this number is incorrect, enter the correct number now.

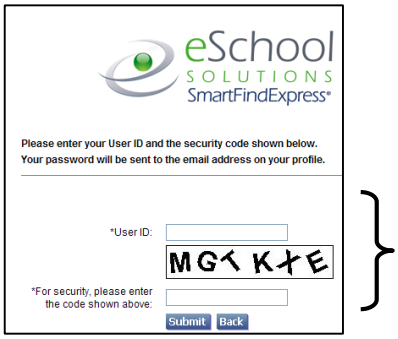
Logging into SmartFindExpress

1. From the McKinney ISD website, www.mckinneyisd.net , select SmartFind Absence Tracking from Quick Links. Select *Click Here to Login to SmartFind Express*. The system Welcome message and district wide announcements are displayed.
2. Two identifiers are required to log in to the system: User ID and Password. Click S*ubmit* to access the system.
3. If you have forgotten your password, click the **'Trouble signing in?'** link.
4. Follow the instructions on the screen and then click Submit. Your password will be sent to the email address on your profile.

You must be registered with the system to use this feature.

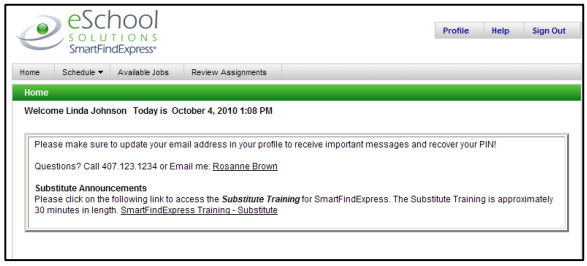
District-wide Announcements

Enter User ID and Password.



1. Enter User ID.
2. Enter Security Code.
3. Click Submit.

5. Upon successful login, the Substitute home page is displayed. From the home page, substitutes can manage personal information, review their work schedule, search for available jobs, and review assignments.



From your Home Page you can:

- ✓ **Modify Profile Information**
- ✓ **Get Help While You Work**
- ✓ **Review Announcements**
- ✓ **View/Modify Work Schedule**
- ✓ **Access Available Jobs**
- ✓ **Review Assignments**

Managing Profile Information

The **Profile** menu lets you view profile information, update your email address and passwords, and view/modify callback information.

View Profile Information

The system displays your current status and address. Contact your system administrator with any changes.

Update Your Email Address

You can easily update your email address.
The system automatically sends Job Creation and Job Cancellation emails (if your district uses this feature). For more information, contact your System Operator.

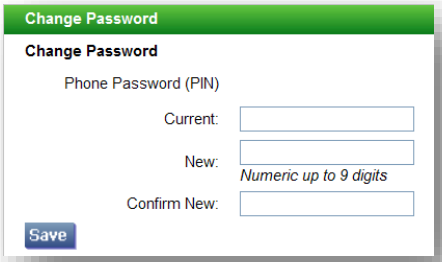
View/Modify Call Back Information

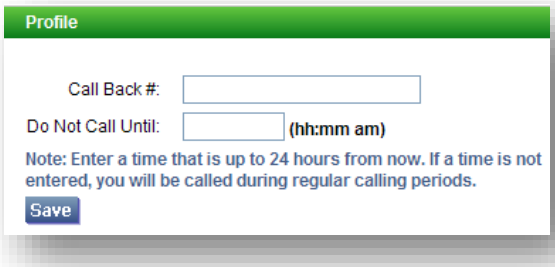
View/update your callback number or specify a temporary 'Do Not Call Until' time.

Change Password

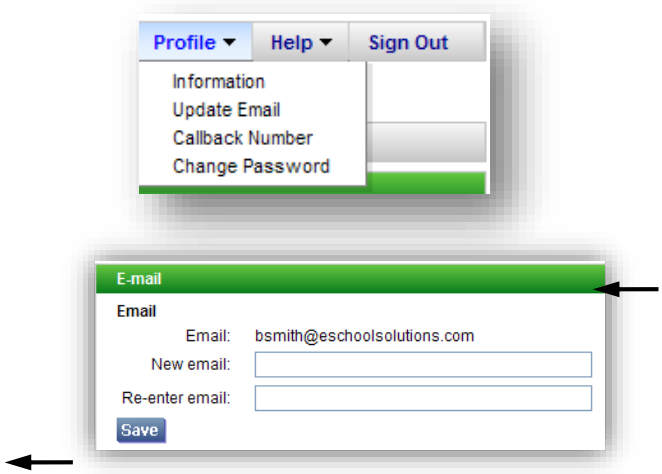
Enter your current password and the new password. You can enter up to 9 digits. Click Save.

Note: *If your district is configured to use Web Passwords, the Change Password feature will include an option to change the Web password.*





Change Phone Password (PIN)



Help

Getting Help While You Work

Click the Help tab to access Help guides and How-to videos.

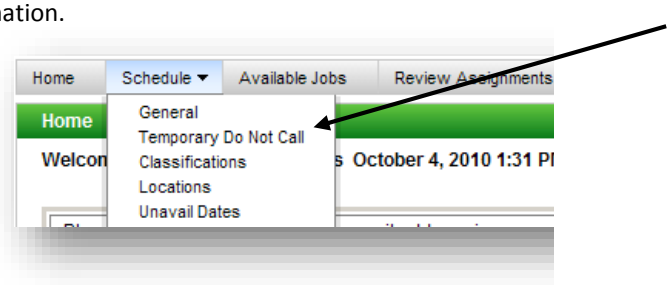
Sign Out

Exiting the System

Click the Sign Out tab to exit the system.

Schedule

Click **Schedule** to review or update work schedule information.

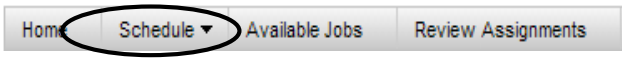


General

1. Click **General** from the Schedule menu to display your daily work schedule.
2. Click New to make changes to your schedule.
3. On the New Schedule screen, make any modifications to the days and times that you are available for work. The start and end times of the job are displayed.
4. If desired, set up Temporary Do Not Call times.

   You will not receive calls for assignments during the time period you specify.

5. To delete a schedule, click the box next to the day you want to remove from your schedule and then click Delete.

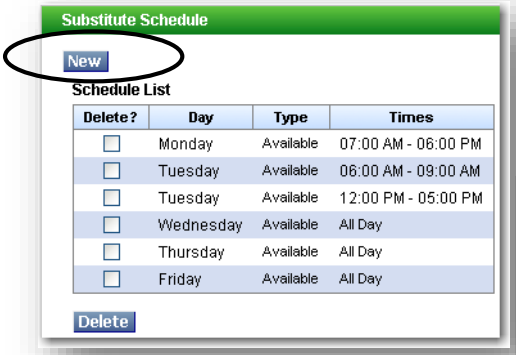


Temporary Do Not Call

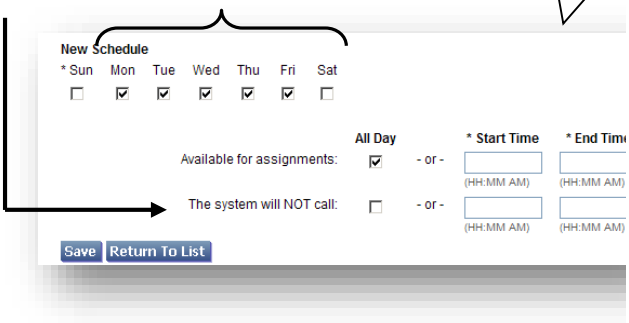
(This feature is also available from the Profile drop-down menu on your home page.)

1. View/Update your call back number. The number should include the long distance indicator and area code (if required) for the system to call form its location.

2. Specify a temporary 'Do Not Call Until' time if you do not want to be called by the system during the regular calling periods. *T*

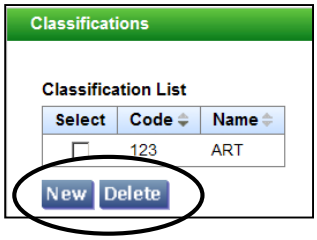


You can receive job offers (for future jobs) during calling periods on days that you have no availability unless the days/times are set up as "Do Not Call."



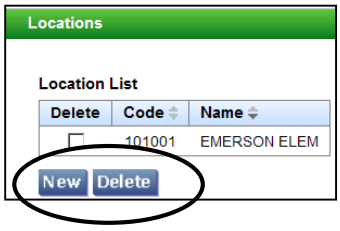
ifications

Click Classifications to see the Classifications you have indicated you will work. *If enabled by your district, this page will contain a New and Delete button for modifying your Classifications.*



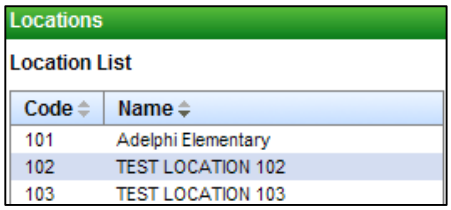
Locations

Click Locations to see the Locations you have selected to work. *If enabled by your district, this page will contain a New and Delete button for modifying your Locations.*

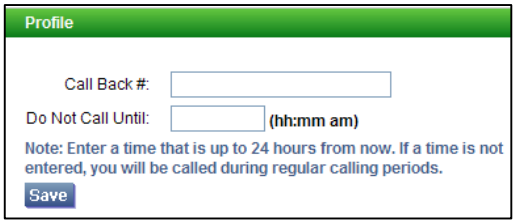


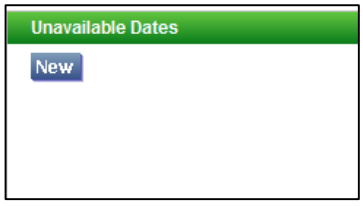
Unavail Dates

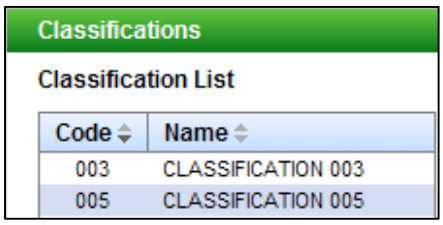
1. To add unavailable periods for when you are not available to work, click New.



The following characters can be used in the **Call Back #** field: ( ),-, *, #.

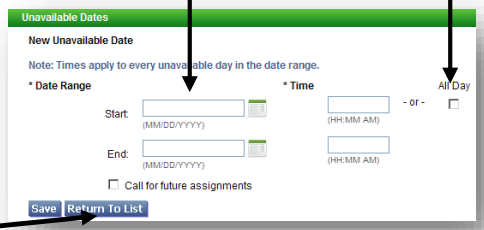






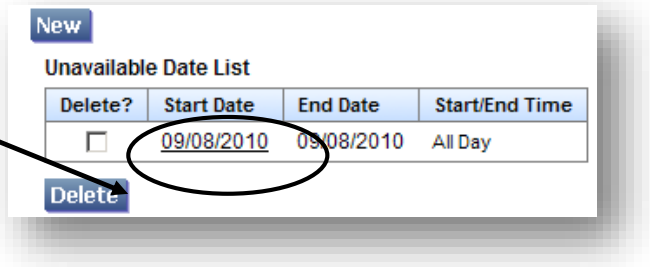
You will not receive job offers from any other locations unless you are specified.

2. Specify the date(s) and time that you are unavailable. If unavailable all day, click "All Day."Multiple unavailability times can be entered for a single day. All unavailability times are shown on the Calendar.

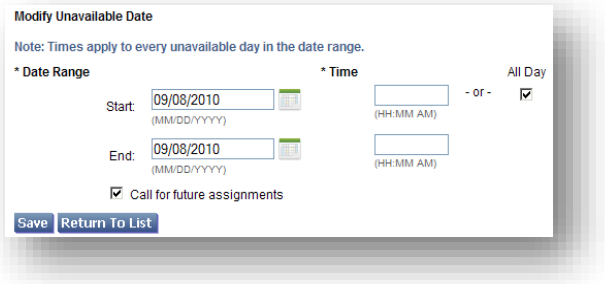


3. To receive calls for future assignments during the date/time specified for unavailability, check the "Call for future assignments" box.

4. To modify an unavailable date, display the Unavailable Date List. Click the Start Date link for the date you want to modify.



5. Make any updates to the unavailable date on the Modify Unavailable Date screen. Click Save.

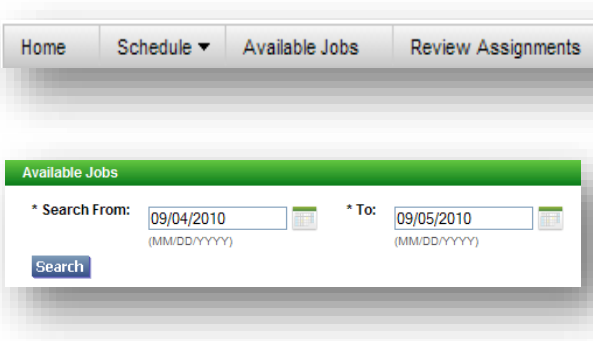


Available Jobs

Click the **Available Jobs** Menu.

1. Click Search to display all available jobs, or enter a date range for your search.

When the system calls out in the *morning, the available jobs presented on the Web and the IVR are jobs for that day. You may be able to review available jobs for future dates if allowed by your district.*



The list of available jobs can change at any time as other substitutes are accepting assignments and jobs are being created.

2. The system displays the list of available jobs. Job listings are preceded by a "Details" or "In Callout" link.

3. Click the Details link for a job to display the job details.

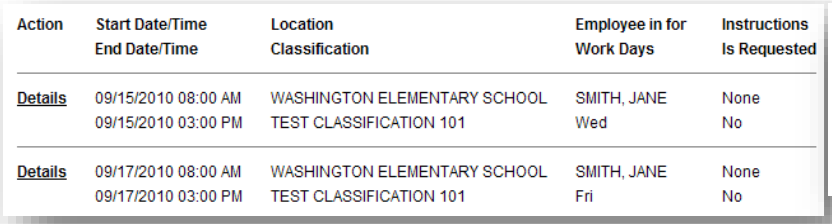
4. View the details of the job on the Available Jobs Detail page. You can also accept the job, decline the job, or return to the jobs list.

5. To accept a job, click Accept Job. The Available Jobs Confirmation screen displays. If the system determines that a substitute is in the process of accepting the job on the IVR, the job will not be assigned. If the job assignment is successful, a job number is displayed.

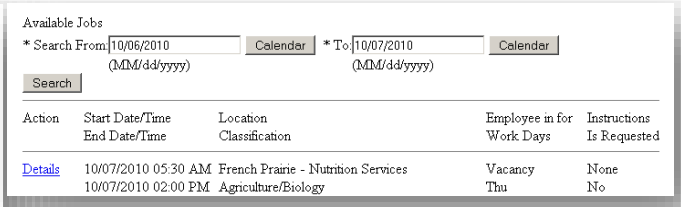
6. To decline a job, click Decline Job. You may **be required to enter a reason for the** decline. A Decline message displays on the Available Jobs screen.

When you click Return to List, the following changes may be occurred on the jobs list:

- Details links may show as In Callout for those jobs that are now available and in callout.
- In Callout links may show as Details links for those jobs still available, but no longer in callout.
- Additional jobs may have become available and now display on the list.
- Jobs that are no longer available have been removed from the list.



Action	Start Date/Time End Date/Time	Location Classification	Employee in for Work Days	Instructions Is Requested
Details	09/15/2010 08:00 AM 09/15/2010 03:00 PM	WASHINGTON ELEMENTARY SCHOOL TEST CLASSIFICATION 101	SMITH, JANE Wed	None No
Details	09/17/2010 08:00 AM 09/17/2010 03:00 PM	WASHINGTON ELEMENTARY SCHOOL TEST CLASSIFICATION 101	SMITH, JANE Fri	None No

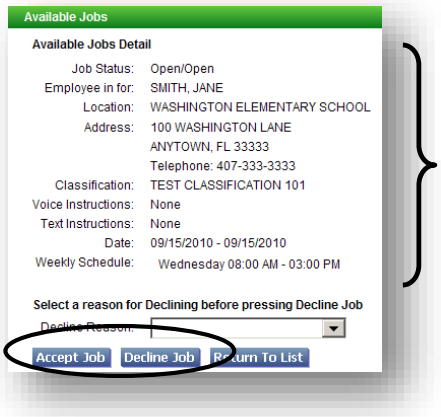


Available Jobs

* Search From: 10/06/2010 (MM/dd/yyyy) Calendar * To: 10/07/2010 (MM/dd/yyyy) Calendar

Search

Action	Start Date/Time End Date/Time	Location Classification	Employee in for Work Days	Instructions Is Requested
Details	10/07/2010 05:30 AM 10/07/2010 02:00 PM	French Prairie - Nutrition Services Agriculture/Biology	Vacancy Thu	None No



Available Jobs

Available Jobs Detail

Job Status: Open/Open
Employee in for: SMITH, JANE
Location: WASHINGTON ELEMENTARY SCHOOL
Address: 100 WASHINGTON LANE
ANYTOWN, FL 33333
Telephone: 407-333-3333
Classification: TEST CLASSIFICATION 101
Voice Instructions: None
Text Instructions: None
Date: 09/15/2010 - 09/15/2010
Weekly Schedule: Wednesday 08:00 AM - 03:00 PM

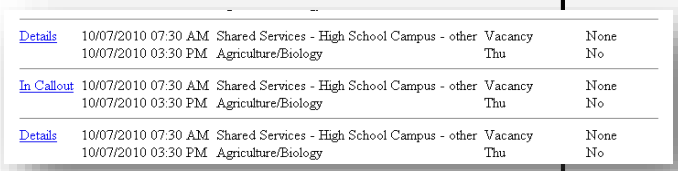
Select a reason for Declining before pressing Decline Job

Decline Reason:

Accept Job Decline Job Return To List

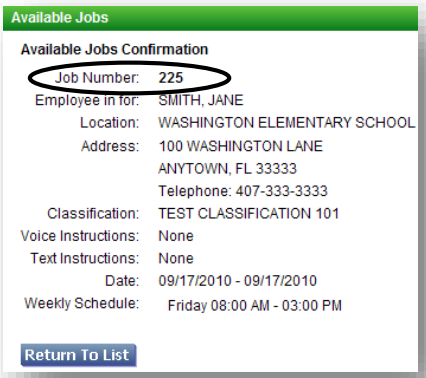
Review job details

7. To review the details of a job currently being called on by the IVR, click the "In Callout" link for the job. The following message is displayed, "*This job is currently being offered to a substitute.*



Details	10/07/2010 07:30 AM 10/07/2010 03:30 PM	Shared Services - High School Campus - other Agriculture/Biology	Vacancy Thu	None No
In Callout	10/07/2010 07:30 AM 10/07/2010 03:30 PM	Shared Services - High School Campus - other Agriculture/Biology	Vacancy Thu	None No
Details	10/07/2010 07:30 AM 10/07/2010 03:30 PM	Shared Services - High School Campus - other Agriculture/Biology	Vacancy Thu	None No

You may retry later." Click Return to List to return to the jobs list.

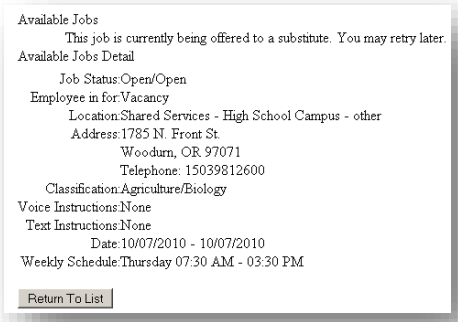


Available Jobs

Available Jobs Confirmation

Job Number: 225
Employee in for: SMITH, JANE
Location: WASHINGTON ELEMENTARY SCHOOL
Address: 100 WASHINGTON LANE
ANYTOWN, FL 33333
Telephone: 407-333-3333
Classification: TEST CLASSIFICATION 101
Voice Instructions: None
Text Instructions: None
Date: 09/17/2010 - 09/17/2010
Weekly Schedule: Friday 08:00 AM - 03:00 PM

Return To List



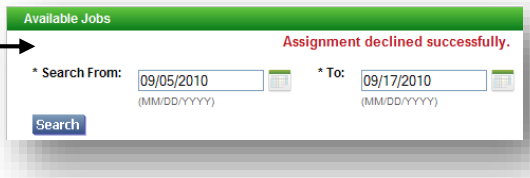
Available Jobs

This job is currently being offered to a substitute. You may retry later.

Available Jobs Detail

Job Status:Open/Open
Employee in for:Vacancy
Location:Shared Services - High School Campus - other
Address:1785 N. Front St.
Woodurn, OR 97071
Telephone: 15039812600
Classification:Agriculture/Biology
Voice Instructions:None
Text Instructions:None
Date:10/07/2010 - 10/07/2010
Weekly Schedule:Thursday 07:30 AM - 03:30 PM

Return To List



Available Jobs

Assignment declined successfully.

* Search From: 09/05/2010 (MM/DD/YYYY) * To: 09/17/2010 (MM/DD/YYYY)

Search

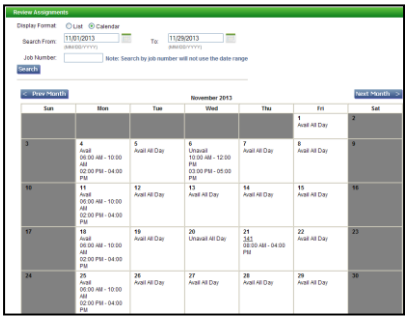
Review Assignments

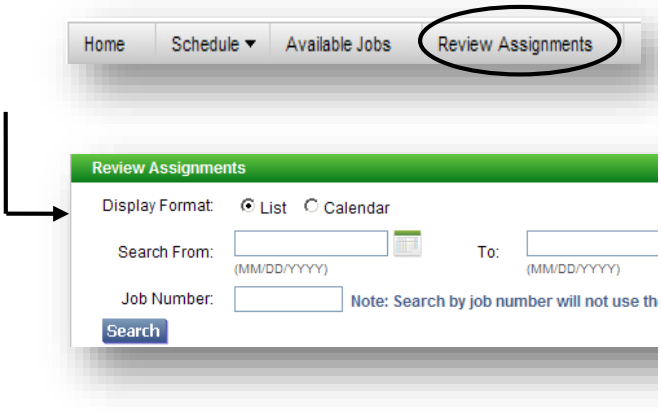
1. Click the **Review Assignments** Menu.

2. To review all assignments, click Search, or enter a date range or job number to display specific assignments. Select List or Calendar format.

6. The default is to display results in List View. Click the Calendar radial button to display your assignments in Calendar format. The start and end times of the job are displayed.

Calendar View





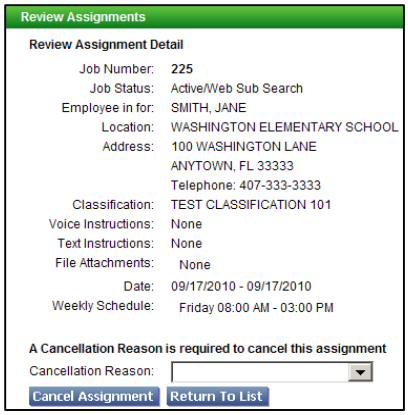
List View

Job #	Start Date/Time End Date/Time	Location Classification	Employee in for Work Days
141	11/21/2013 08:00 AM 11/21/2013 04:00 PM	ZZ Test Location ZZ Test Classification	ZZ Test Employee, Thu

3. Click on the job number link for the assignment you want to review. The Review Assignment Detail screen is displayed.

4. If cancelling an assignment, the cancellation reason must be selected from the drop-down menu. Once the Cancel Assignment button is pressed, a "cancelled successfully" message is displayed.

24350	05/14/2010 07:30 AM	ZZ TEST LOCATION	ZZ Test Employee,
Cancelled	05/14/2010 03:30 PM	ZZ Test Classification	Fri



Finding and Accepting Jobs over the Telephone

Before any features are available, you must register with the system and create a PIN. The Access ID and PIN are used for all interactions with the system.

Call-in

From the main menu, select one of the following options.

1. Review or Cancel Assignments
Job information is played. Current and future jobs are played in job number order. After each job is played, you may be allowed to cancel the job. If this option is not played, contact the system operator. To cancel a job, enter a reason from the list of decline/cancellation reasons. Canceling an assignment on the day of the job may result in being disqualified from being offered other jobs for today.

2. Hear Available Jobs
If feature is enabled, listen to available jobs. During morning callout, only jobs for today are played.

3. Review or Modify Callback number
The number currently in your profile is played. Enter all digits that will be required to call you from the location of the system. Include the long distance code and/or area code.

4. Review or modify Temporary Do not Call Time
If feature is enabled, enter a time that the system can resume calling you.

5. Review or Modify Unavailability dates
Your current and future unavailability dates are played in start date order. You are not offered jobs that occur during this period. The unavailability period does not restrict you from calling the system and hearing jobs for any date.

Call-in (continued)

6. **Review or Modify Daily Availability**
   - Review or delete time periods you are available to work.
   - Enter a new time period you are available to work.
   - Review or delete a time period you do not want to receive calls.
   - Enter a new time period that you do not want to receive calls. When entering a time period, select the days/times.

7. **Change PIN or Name Recording**

Job Offers

When the system calls you about an open job, the job information will play, including the absent employee's name, the location, classification, and dates and times of the job. Also, if special instructions were recorded for the job, they will be played. You can accept or decline the assignment. If you decline the assignment you will be asked to enter a reason for the decline and you may be disqualified from other job offers for that day during the morning callout.

Assignment Cancellations

Substitute cancelled assignment notification calls are made once an hour during callout periods. The details of the cancelled job are played. You will automatically be made available for other jobs during the time period that was held by the canceled job.

Call-out

Substitutes are called and offered jobs. The system may also call to inform a substitute of an assignment cancellation.

A substitute can:

- **Press the star (*) key for the system to wait up to 2 minutes**
  When the system calls, if someone else answers the telephone and has to locate you or you have to locate your login information, the system can be told to wait for approximately two minutes. If, at that time no Access ID is entered, the system will disconnect and record that the result of the call was a no answer.
- **Access the system**
  Enter your Access ID and PIN, both followed by the star (*) key.