

SmartFind*Express*®

Substitute User Guide



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).

Copyright ©2002-2006 by eSchool Solutions Inc. Confidential

Table of Contents

Chapter 1 Introduction	2
<i>System Overview.....</i>	2
<i>About this Guide.....</i>	2
Conventions Used in this Guide	2
Chapter 2 Internet Browser Access	4
<i>Getting Started</i>	4
System Requirements	4
Signing In	4
Privacy and Terms of Use Statements (ASP Service Customers only)	4
Signing Out.....	5
Substitute Home Page.....	5
Navigation Tools	5
<i>Using the Substitute Menu.....</i>	7
<i>Profile.....</i>	7
Profiles.....	8
Schedule	8
Adding a New Schedule	9
Classifications.....	9
Locations	10
Unavailable Dates.....	10
Adding Unavailability Dates	10
Modifying Unavailability Dates	11
<i>Searching for Available Jobs.....</i>	11
Using the Available Jobs Screen	12
Accepting a Job	12
Declining a Job	13
<i>Reviewing Assignments</i>	13
Using the Review Assignments Screen	13
Displaying Jobs in Calendar Format.....	14
Reviewing Job Details	14
Canceling Assignments	15
Chapter 3 Telephone Access.....	16
<i>Registration.....</i>	16
<i>Call-in.....</i>	16
<i>Call-out.....</i>	17
Job Offers	17
Assignment Cancellation.....	17

1 eSchool Solutions Proprietary Documentation. Company Confidential/Do Not Distribute – Do Not Post on Unsecured Web Sites (such as your district web site).

Chapter 1 Introduction

Welcome to SmartFindExpress!

The Substitute module of the SmartFindExpress system allows quick and easy access to the information you need to review your profile, search for jobs, and review or cancel assignments. This guide provides instructions for performing these tasks using an Internet browser or over the telephone.

System Overview

SmartFindExpress is a technology solution that integrates database records with telephone Interactive Voice Response (IVR) and browser-based technology. SmartFindExpress automates the absence entry process and the substitute search and job assignment.

Telephone IVR and computer browser software (such as Internet Explorer or Netscape), both communicate with SmartFindExpress to update information in the SmartFindExpress database.

SmartFindExpress automates, prioritizes, assigns, and dispatches the most appropriate substitutes for the job. You have the ability to decline jobs, upon which the system repeats the process for the next selected substitute in sequence. SmartFindExpress records the assignment and tracks the status through completion for record keeping and management reports.

SmartFindExpress selects substitutes to fill absences and places calls to those substitutes during the specified call-out times. Substitutes can also call into the system or use their computer to search for available jobs. SmartFindExpress can be accessed 24 hours a day, 7 days a week by administrators, employees, and substitutes.

About this Guide

This guide contains the following chapters:

Chapter 1, *Introduction*, provides an overview of the SmartFindExpress system and describes the organization of this guide and the conventions used.

Chapter 2, *Internet Browser Access*, describes browser access features and provides instructions for displaying and modifying information on your profile and on job and assignment lists.

Chapter 3, *Telephone Access*, contains the procedures for accessing and registering with SmartFindExpress over the telephone.

In addition to this guide, you may receive a Quick Reference card during implementation of the system or upon being hired.

Conventions Used in this Guide

To help you effectively use your documentation, this guide follows the conventions described in the following topics.

Guide Identification

The top of every page displays a header that contains the title of the guide and the current chapter name and section name.

The bottom of every page displays the publication month and year of the document.

Information Alerts

This guide uses "Notes" with the following format:

Note: *This is a sample of a note. Notes provide information that will help you with the current task.*

Typographical formats

The following text format identifies special information:

Italics Words in *italics* indicate action buttons such as *Save*, *Continue*, *Return to List*, *NEXT*, and *PREV*.

Bold The name of commands and options are shown in **bold**. References to links also appear in **bold**, for example, "and click the **Start Date** link."

Chapter 2 Internet Browser Access

This chapter includes information on Internet browser access features and provides instructions for performing the functions on the Substitute menu.

Getting Started

This section describes browser access requirements and system features.

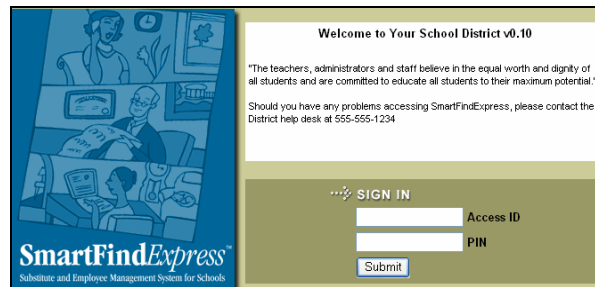
System Requirements

The minimum Internet Web Browser versions supported are:

- Microsoft Internet Explorer version 5.5 or later
- Netscape Communicator version 6.2 or later
- Mozilla/Firefox 1.0 or later
- Safari 1.0 or later.

Signing In

Open your Internet browser and access the SmartFindExpress site. Your site can be found at: www._____. The SmartFindExpress Welcome screen displays the welcome message and any "all users" announcements. If multiple languages are present, the **Select Language** option will display on this screen. Two identifiers are required to log on to the system: Access ID and Personal Identification Number (PIN). Only numeric information is allowed in these fields (no dashes). Once both fields are entered, the *Submit* button must be pressed to access the system.



Privacy and Terms of Use Statements (ASP Service Customers only)

If your district uses SmartFindExpress as a service from eSchool Solutions, the system will require all existing and new users to view and acknowledge acceptance of the legal "Terms of Use" policy. This action is only required the first time a user accesses the system, or if any revisions are made to the policy. The Terms of Use may be viewed from any page in the system.

The Privacy policy explains the data collection and use practices of eSchool Solutions. It can be viewed from any page in the system. Users will be alerted if any revisions are made to this policy.

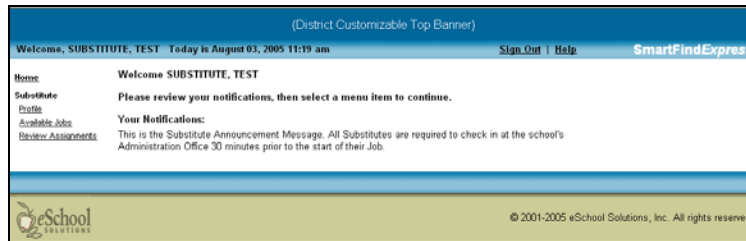
Signing Out

At any time during the session, the **Sign Out** command can be pressed to end the session and disconnect. Pressing the browser's *Back* button or going to another site on the Internet does not disconnect the session. To ensure security and privacy of information, sign out and disconnect, or close the browser when finished with your session.

Note: Do not use the browser's Back button to navigate to a previous screen. There are buttons provided within the program to return you to previously viewed information. For example, the Return to List button, or use the tabs at the top of a screen.


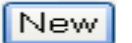

Substitute Home Page

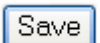
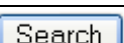
After a successful login, the home page is displayed. It displays your name, any substitute-only announcements and notifications of expiration dates.




Navigation Tools

SmartFindExpress uses *links* to display user screens and various action *buttons* to perform specific functions or to navigate to other screens. Links are indicated by underlined text. All menu items are underlined. When you click on a menu item, the corresponding page is displayed. Navigation tools in SmartFindExpress consist of buttons and icons. The following table describes the common navigation tools.

Button/Icon	Function
	After clicking in a deletion box, clicking <i>Delete</i> removes the record(s) from the database.
	Displays a new screen for entering data for that specific option.
	Returns you to the primary listing for that feature.

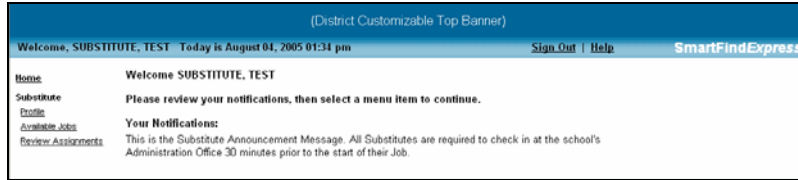
Button/Icon	Function
	Updates the database after data entry.
	Searches the database based on the criteria entered on the screen.

	Date icon. Clicking this button displays a calendar. Select a date or use the arrows on the calendar to scroll to the next or previous months and years. Selecting a day closes the calendar and places the date in the Date field.
---	---

Note: Fields on the screen that are marked with an asterisk (*) denote required information.

Using the Substitute Menu

This section provides detailed instructions for using each of the options on the Substitute menu.



- | | |
|---------------------------|---|
| Profile | Allows you to review and modify profile information. |
| Available Jobs | Allows you to search for and accept available jobs. |
| Review Assignments | Allows you to manage your search for assignments and cancel assignments if the job has not yet started. |

Profile

Use the Profile function to review, set up, modify, or delete profile information.



Multiple screens are available on your profile:

- Profiles** – allows you to change your call back number and set a temporary “Do Not Call” time.
- Schedule** – allows you to review, add, or delete your permanent daily availability and Do Not Call information.
- Classifications** – displays the classifications that you have indicated you will work.
- Locations** – displays the list of locations that you have indicated that you will work. You will not receive any job offers for any other locations unless you are specified.
- Unavailable Dates** – allows you to view, modify, add, and delete unavailability dates. These dates are temporary periods for when you are not available for work.

Profiles

The Profiles screen allows you to add or update your call back number and temporary "Do Not Call" time. After making updates to this screen, click **Save** to update the profile information.

Profile

Status: Active/Registered
Address:

Call Back #:

Do Not Call Until: (hh:mm am)

Note: Enter a time that is up to 24 hours from now. If a time is not entered, you will be called during regular calling periods.

Field	Description
Call Back Number	The number can include () - , * # characters. It should include the long distance indicator and area code (if required) for the system to call from the location where the system is located.
Do Not Call Until	The current date and time setting for Do Not Call will display if this feature is enabled. Deleting the time will remove the setting. A Temporary Do Not Call time setting applies to a maximum of 24-hours from the current date and time. The period could be less than 24 hours based on the system setup. The allowable length of time will be indicated in the note below this field.

Schedule

The Schedule tab displays your permanent daily availability schedule and may be modified. Daily availability includes the days of the week and times that you are available to work. 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."

You can view, add, or delete daily availability information. After making updates to this screen, click **Save** to update your work schedule.

Schedule

Schedule List

Delete?	Day	Available	All Day
<input type="checkbox"/>	Monday	Available	All Day
<input type="checkbox"/>	Tuesday	Available	All Day
<input type="checkbox"/>	Wednesday	Available	All Day
<input type="checkbox"/>	Thursday	Available	All Day
<input type="checkbox"/>	Friday	Available	All Day

To delete a schedule from the list, click the deletion box next to the schedule you want to remove and click *Delete*.

Adding a New Schedule

Click *New* to display the New Schedule screen. Enter the daily availability and/or "Do Not Call" settings and then click *Save* to update your availability.

New Schedule

* Sun Mon Tue Wed Thu Fri Sat

* Start Time * End Time
(hh:mm am) (hh:mm am)

Available for assignments: Or

The system will NOT call: Or

Field Name

Description

Days of the week

Indicate the days of the week that you are available to work or not available to be called. Each day of the week can have a different availability time or "Do Not Call" time.

Available for Assignments

Enter the times that you are available for assignments. Each day can have multiple time periods. Click the *All Day* option to indicate that you are available all day for any job, or enter a start and end time for each day of the job.

The System will NOT Call

Times that you do not want to be called can be modified if this feature is enabled. You may want to set the specific hours you do not want to be called during regular calling hours for every day of the week. To set a time, enter the start, and end times. Checking "*All Day*" will ensure that you are never called during the days specified.

Classifications

If allowed, the Classification screen displays the list of classifications that you have indicated you will work.

You may receive job offers for other classifications (regardless of this list) when a substitute cannot be found for a job.

Classifications	
Classification List	
Code	Name
502	Bus Driver

Locations

If allowed, the Locations screen displays the locations where you indicated you would work. You will not receive any job offers for any other locations unless you have been *specified* for the job.

Locations	
Location List	
Code	Name
0	All Locations
201000	Region 20 Elementary Schols

Unavailable Dates

These dates identify the temporary periods when you are not available for work. You can have unlimited periods of unavailability. Unavailability affects telephone call-out only. You can call or sign into the system and accept jobs that occur during these dates at any time.

Note: *Administrator-assigned unavailable dates cannot be modified or deleted.*

The Unavailable Dates screen allows you to view, modify, add, and delete unavailability dates.

Unavailable Dates			
<input type="button" value="New"/>			

Unavailable Date List			
Delete?	Start Date	End Date	Start/End Time
<input type="checkbox"/>	<u>11/30/2005</u>	12/06/2005	All Day
<input type="checkbox"/>	<u>12/12/2005</u>	12/16/2005	08:00 AM - 03:30 PM
<input type="button" value="Delete"/>			

To delete an unavailability date, click the deletion box next to the date you want to remove and click *Delete*.

Adding Unavailability Dates

Click *New* to display the New Unavailable Date screen. Complete the screen information and click *Save* to add the new unavailability date to your profile.

New Unavailable Date
Note: Times apply to every unavailable day in the date range.

* Date Range: (mm/dd/yyyy) * Time: All Day (hh:mm am)

Start: - Or -

End:

Call for future assignments

Field Name	Description
Date Range	Enter a date in the correct format or click the Date icon and then select a date from the calendar. The format is mm/dd/yyyy.
Time	Check "All Day" or enter a time range that applies to every day of the unavailability period. The format is hhmm am/pm.
Call for Future Assignments	Check this box if you want to receive calls for future assignments during the date/time specified.

Modifying Unavailability Dates

On the Unavailable Dates list, click the **Start Date** link of the date you want to modify. The Modify Unavailable Date screen is displayed. After modifying the date information, click Save. Refer to the previous section for field descriptions.

Modify Unavailable Date
Note: Times apply to every unavailable day in the date range.

* Date Range: (mm/dd/yyyy) * Time: All Day (hh:mm am)

Start: 11/30/2005 - Or -

End: 12/06/2005

Call for future assignments

Searching for Available Jobs

Use this function to search, review, and accept open jobs. The list of available jobs can change at any time as other substitutes are accepting assignments, and jobs are being created. You can accept open jobs if any of the following conditions exist:

- This option is allowed
- You are available to work all days and times of the job
- You are specified for the job
- You meet the criteria that the telephone (IVR) is currently calling

Using the Available Jobs Screen

This screen allows you to display the list of all available jobs in the database, review job details, and accept jobs. Click *Search* to display the list of all jobs, or enter a date range and then click *Search* to display search results based on the date range.

The screenshot shows the 'Available Jobs' interface. At the top, there are search filters for 'Search From' (12/29/2005) and 'To' (01/31/2006), both with calendar icons. A 'Search' button is located below the filters. Below the search area is a table with the following columns: Action, Start Date/Time, End Date/Time, Location Classification, Employee in for Work Days, and Instructions Is Requested. The table contains one row of job details.

Action	Start Date/Time	End Date/Time	Location Classification	Employee in for Work Days	Instructions Is Requested
Details	01/10/2006 07:00 AM	01/11/2006 05:00 PM	K114 PS 114 RYDER ELEMENTARY UNKNOWN	Vacancy Tue Wed	None Yes

The job list displays general information on the job, such as start date and time, end date and time, location, classification, and employee name. It also indicates if instructions are available and if you are the requested substitute. If instructions are available, either verbal or written, you will be able to access them from the Details screen.

Clicking on the **Details** link for the job will display the Available Jobs Detail screen. This screen provides additional details about the job. You can accept or decline the job.

The screenshot shows the 'Available Jobs Detail' screen. It displays the following information: Job Status: Open/Open; Employee in for: Vacancy; Location: K114 PS 114 RYDER ELEMENTARY; Classification: UNKNOWN; Voice Instructions: None; Text Instructions: None; Date: 01/10/2006 - 01/11/2006; Weekly Schedule: Tuesday 07:00 AM - 05:00 PM, Wednesday 07:00 AM - 05:00 PM; Location Announcement: Telephone: 718-257-4428 Address: 1077 REMSEN AVENUE, BROOKLYN 11236. Below this information is a section titled 'Select a reason for Declining before pressing Decline Job' with a 'Decline Reason' dropdown menu. At the bottom, there are three buttons: 'Accept Job', 'Decline Job', and 'Return To List'.

Accepting a Job

To accept a job, click the *Accept Job* button. The Available Jobs Confirmation screen is displayed. The system makes a final check to verify that the job was not assigned while you were online. If it determines that a substitute is in the process of accepting the job on the IVR, the job will not be assigned. A system message will display the reason that the job cannot be assigned. If the job assignment is successful, a job number is displayed. The job number is the official notification that the job was successfully assigned.

Available Jobs Confirmation

Job Number: 494
Employee in for: Vacancy
Location: K114 PS 114 RYDER ELEMENTARY
Classification: UNKNOWN
Voice Instructions: None
Text Instructions: None
Date: 01/10/2006 - 01/11/2006
Weekly Schedule: Tuesday 07:00 AM - 05:00 PM
Wednesday 07:00 AM - 05:00 PM
Location Announcement: Telephone: 718-257-4428 Address: 1077 REMSEN AVENUE, BROOKLYN 11236

[Return To List](#)

Declining a Job

To decline the job, you may be required to select the reason for the decline before you click the *Decline Job* button. A message indicating that the “decline” was successful is displayed on the Available Jobs screen.

Assignment declined successfully.

Available Jobs

(mm/dd/yyyy) (mm/dd/yyyy)

* Search From: 1/2/29/2005 * To: 01/31/2006

[Search](#)

Reviewing Assignments

Use this function to list all your assignments, search for assignments past, present and future by date range, and search for assignments by job number. Job assignments can be displayed in List or Calendar format.

Once the list of assignments is displayed, you can view the job details. Assignments can be cancelled from the Review Assignment Detail screen, if allowed.

Using the Review Assignments Screen

Click *Search* to display all of your assignments, or enter a job number or date range for a more specific search. The current date is the default date.

Dates for the search can be any date in the past, present, or future; however, the data is limited to the number of days the data has been saved. Cancelled jobs are optionally displayed. Click *Search* after entering your search criteria to display the list of assignments. The list is displayed in descending date order.

Review Assignments

Display Format: List Calendar

(mm/dd/yyyy) (mm/dd/yyyy)

Search From: To:

Job Number: **Note: Search by job number will not use the date range**

Job #	Start Date/Time	Location	Employee in for
	End Date/Time	Classification	Work Days
494	01/10/2006 07:00 AM	K114 PS 114 RYDER ELEMENTARY	Vacancy
	01/11/2006 05:00 PM	UNKNOWN	Tue Wed

Displaying Jobs in Calendar Format

The calendar format displays assignments and availability/unavailability information starting at the "Search From" month. One month is displayed at a time. The job number and start time display. Pressing the **job number** link displays the job details. If there are multiple absences for the same day, they will be listed. Cancelled jobs do not display in the calendar format. Non-workdays (based on daily availability) are shaded in light gray.

< Prev Month Next Month >

January 2006

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10 494 07:00 AM	11 494 07:00 AM	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Reviewing Job Details

Clicking the **job number** link displays the assignment details. Assignments can be viewed or cancelled from this screen.

Review Assignment Detail

Job Number: 494
 Job Status: Active/Web Sub Search
 Employee in for: Vacancy
 Location: K114 PS 114 RYDER ELEMENTARY
 Classification: UNKNOWN
 Voice Instructions: None
 Text Instructions: None
 Date: 01/10/2006 - 01/11/2006
 Weekly Schedule: Tuesday 07:00 AM - 05:00 PM
 Wednesday 07:00 AM - 05:00 PM
 Location Announcement: Telephone: 718-257-4428 Address: 1077 REMSEN AVENUE, BROOKLYN 11236

A Cancellation Reason is required to cancel this assignment

Cancellation Reason:

Canceling Assignments

An assignment can be cancelled if the time window for allowing cancellation has not been exceeded. The reason for canceling (if visible) must be selected from the pull-down list before clicking the *Cancel Assignment* button. Once this button is pressed, the assignment is cancelled.

The Job was cancelled successfully.

Review Assignments

Display Format: List Calendar

(mm/dd/yyyy) (mm/dd/yyyy)

Search From: To:

Job Number: **Note: Search by job number will not use the date range**

Chapter 3 Telephone Access

This chapter provides information and procedures for accessing SmartFindExpress using a telephone (Interactive Voice Response).

Registration

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 and should never be used by anyone else. If you are not registered, you will not be called and offered or assigned to any jobs.

To register, follow these steps:

1. Call the main system number.
2. Enter your Access ID, followed by the star (*) key.
3. Enter your PIN, followed by the star (*) key.
4. If your Access ID and PIN are the same number, you will be asked to enter a new PIN before you can continue using the system. PIN numbers must meet the minimum length that has been setup in the parameters and can only contain numeric information.
5. If there has been no voice recording of your name, you are asked to record your name. Record your name and when you have finished recording, press the star (*) key.
6. Finally, you will hear the telephone number that the system will call you. You can modify this number.

Call-in

Substitutes can call the system and enter their Access ID and PIN, both followed by the star (*) key. From the main menu, select one of the following choices.

1. **Review or Cancel Assignments**
Information played about the job includes the absent employee's name, location, classification, dates, and times of the job and special instructions. Current and future jobs are played in job number order. There is no option to hear past assignments. After each job is played, you may be allowed to cancel the job. If this option is not played, then contact the system operator for assistance. When canceling a job, you may be asked to enter a reason for canceling the assignment from a 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 this feature is enabled, you can listen to available jobs. The number of jobs played depends on how many are available to hear at that time. During morning callout times only jobs for today are played.
3. **Review or Modify Callback (telephone) 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 this 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.
6. Review or Modify Daily Availability
Your menu choices are:
 - To review or delete time periods you are available to work
 - To enter a new time period you are available to work
 - To review or delete a time period you do not want to receive calls
 - To enter a new time period that you do not want to receive calls.When entering a time period, you will be asked to choose the days of the week and the times.
7. Change PIN or name recording.

Call-out

Substitutes are the only users who are called and offered jobs. The system will only call a substitute after the substitute has called the system to register and create a PIN. The system may also call to inform a substitute of an assignment cancellation.

When called, the 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.
- **To access the system**
Enter your Access ID and PIN, both followed by the star (*) key.

Job Offers

When the system calls you about an open job, the job information will play, including the absent employee's name, the location, the classification, and the dates and times of the job. Also, if special instructions were recorded for the job, they will be played to you. 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 only.

Assignment Cancellation

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 now canceled job.