

SmartFindExpress

Employee User Guide

Version 2.5

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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 SmartFindExpress 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 main system number; (406) 300-5840.
2. Enter your Access ID, followed by the star (*) key. Access ID is your Employee Number.
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 & job assignment. Record your name & job assignment. When you have finished recording, press the star (*) key.
5. Next you will hear the primary location and classification that has been set up in your profile. If this information is not correct, continue with the registration process and then contact your system operator to correct the information.
6. 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 of 4 digits and cannot be more than 9 digits.

Logging into SmartFindExpress

1. Open your Internet browser and access the SmartFindExpress site; polson.eschoolsolutions.com. The system Welcome message and any district-wide announcements are displayed.
2. Two identifiers are required to log in to the system: User ID and Password. You may use Access ID and PIN or your Districts login. Click *Submit* 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.



Enter your User ID and Password

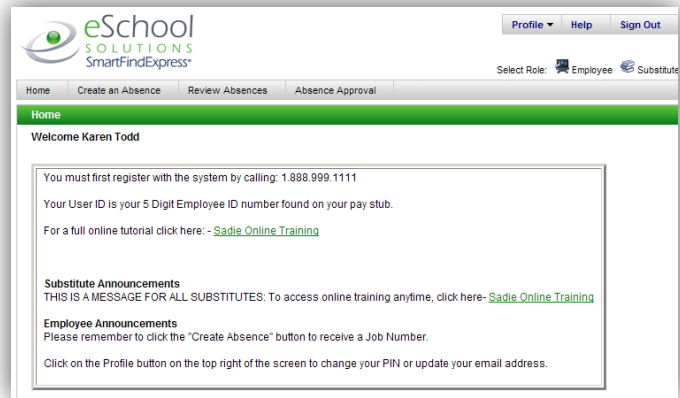


1. Enter User ID
2. Enter Security Code
3. Click Submit

- Upon successful login, the Employee home page is displayed. From your home page, you can manage your personal information, create absences and review absence information.

From your Home Page you can:

- ✓ **Modify Profile Information**
- ✓ **Get Help While You Work**
- ✓ **Change/Toggle User Role**
- ✓ **Create an Absence**
- ✓ **Review/Cancel Absences**
- ✓ **Review Absence Approval Requests**

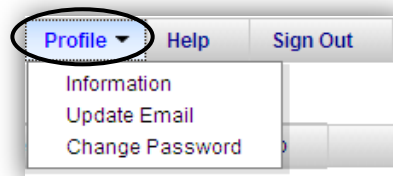


Managing Profile Information

The **Profile** feature lets you view profile information, update your email address and change your passwords.

View Profile Information

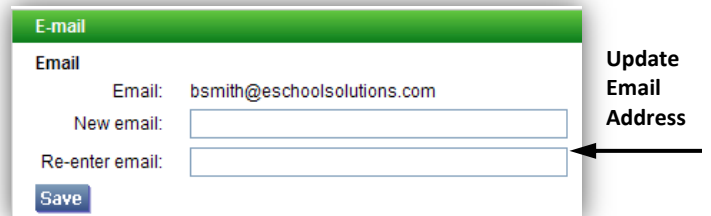
Your current status in the system and your address in the system are shown. Contact your system administrator with any changes.



Update Your Email Address

Type in your new email address and click Save.

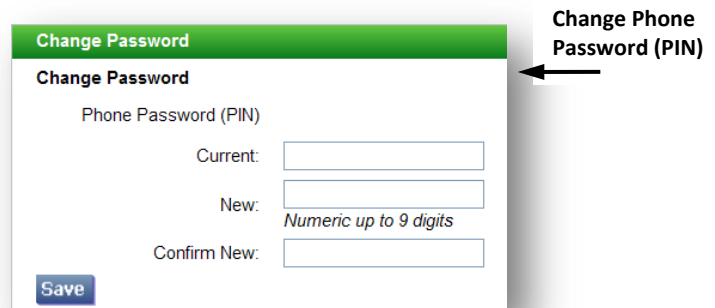
The system automatically sends Job Creation and Job Cancellation emails (if your district uses this feature). For more information, contact your System Operator.



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.*



Help

Getting Help While You Work

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

Sign Out

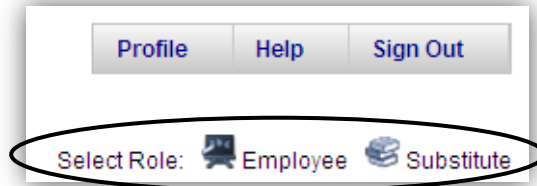
Exiting the System

Click the Sign Out tab to exit the system.

Select Role

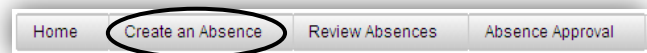
Change User Role


For multi-role employees, the system lets you automatically switch between profiles to complete tasks. No need to log out of the system and back in again!

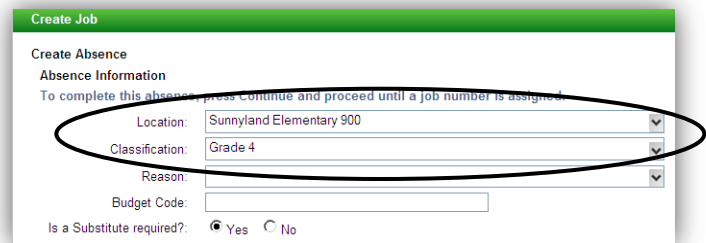


Create an Absence

1. Click Create an Absence to display the Create Absence page.
2. The Location field displays your primary location.
3. The Classification field displays your primary classification.



 *For Itinerant schedules, all of the locations and classifications you work are visible on the pull-down menu.*




Location

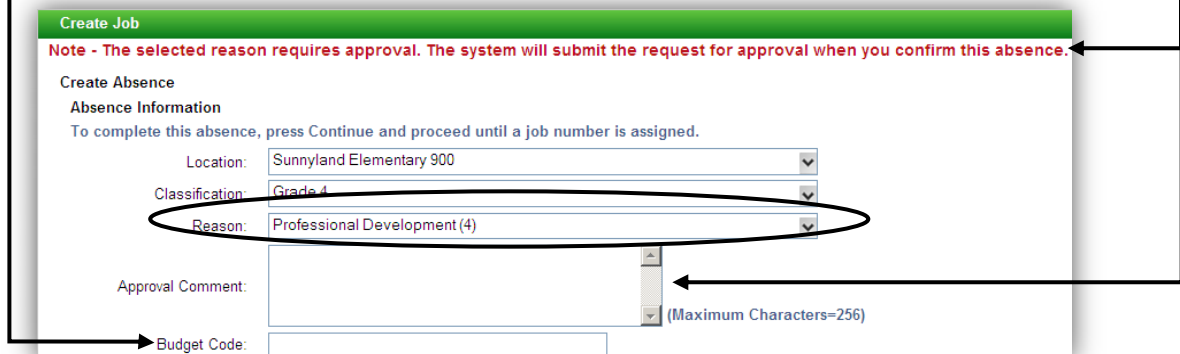
To report an absence for a different location, use the drop-down menu to change the location of the job.

Classification

To report an absence for a different classification, use the drop-down menu to change the classification of the job.

4. Select a Reason to assign to this absence.
5. If required, enter a budget code for the reason.

 *If you select a reason that requires administrator approval, the Create Job screen displays the following reminder: 'You can continue with the job creation with this reason or choose another reason.' You can also enter an Approval Comment to provide your approver. *** Absence Approvals may not be used in your district.***



- Choose **Yes** or **No** to indicate if the absence requires a substitute.

If a substitute is not required to fill the absence, click **No**.

The choice of indicating if a substitute is required is only offered if the absence would normally require a substitute.

Is a Substitute required?: Yes No

Click **No** if you do NOT need a substitute for your absence.

- The default for entry of an absence is today's date. To edit the dates, click the calendar icon to display the calendar, or type in new dates. **You may not enter an absence for past dates.**

		Absence		Substitute	
Dates:		Start Time	End Time	Start Time	End Time
Start: 01/10/2011 (MM/DD/YYYY)		08:00 AM	03:30 PM	08:00 AM	03:30 PM
End: 01/10/2011 (MM/DD/YYYY)					
Weekly Schedule		(hh:mm am)	(hh:mm am)	(hh:mm am)	(hh:mm am)
Monday	<input checked="" type="checkbox"/>	08:00 AM	03:30 PM	08:00 AM	03:30 PM
Tuesday	<input checked="" type="checkbox"/>	08:00 AM	03:30 PM	08:00 AM	03:30 PM
Wednesday	<input checked="" type="checkbox"/>	08:00 AM	03:30 PM	08:00 AM	03:30 PM
Thursday	<input checked="" type="checkbox"/>	08:00 AM	03:30 PM	08:00 AM	03:30 PM
Friday	<input checked="" type="checkbox"/>	08:00 AM	03:30 PM	08:00 AM	03:30 PM

- The selected location's Start Time and End Time are displayed. Substitute times default to the absence times. To change the hour/minute or am/pm indicator, select the field and then use the up or down arrow on your keyboard to make changes.

- You can modify your work schedule. The workdays must correspond to the days of the absence being reported.

If absence days are non-consecutive, or if each day of the multiple-day job has a different start/end time, make the adjustments to the weekly schedule.

If separate Absence and Substitute times are used, Start/End Time fields will display for both sets of time. A time modification to Absence Start will automatically reflect on Substitute Start Time; a time modification to Absence End Time will automatically reflect on Substitute End time.

- To specify a substitute for the absence, enter the substitute's ID number. If unknown, click *Name Lookup* to display the Substitute Name Lookup screen.

Substitute Name Lookup

Enter Name (or partial name), then press Search

Last Name: Begins with Contains

First Name: Begins with Contains

Records Per Page: 50

Substitute

Specify a Substitute? ID:

PRE-ARRANGED?

If the specified substitute has accepted this assignment and does not need to be contacted, press YES.

Has the substitute accepted this job?: Yes No

If the substitute has accepted the job, click **"Yes"**. The **substitute will be assigned** to the absence and the system will not call the substitute. This is called "Prearranging."

Click **"No"** if the substitute has not accepted the assignment. **Phone calls will be made to offer the substitute the job.** If the specified substitute does not accept the job the system will call other qualified substitutes.

11. Add any instructions you want to provide to the substitute. These instructions will also be voiced to a substitute over the telephone.
12. Attach any files that you want to provide to the substitute or administrator. Up to three attachments can be added.
13. Click **Continue** for the next page. If any errors are detected on the form, you will have the opportunity to make corrections.
14. Verify the absence information and then click **Create Absence** to create the job and receive a job number. To modify the absence information, click the Cancel button to return to the Create Job screen.
15. Clicking the **Create Absence** button displays the Create Absence Verification screen. A job number is created for the absence.

Substitute Instructions:

File Attachments: (Maximum file size:)

Continue

Create Job

Note - The selected reason requires approval. The system will submit the

Create Absence Confirmation
This absence will not be created until the Create Absence button is pressed

Job Status: **Approval Pending/Open**
 Employee: Karen Anderson
 Location: Sunnyland Elementary
 Classification: Grade 4
 Reason: Professional Development (4)
 Approval Comment: ESOL workshop
 Budget Code: 23456789
 Voice Instructions: None
 Text Instructions: None
 File Attachments: None

Dates: 02/01/2011 - 02/01/2011

Weekly Schedule:

	Employee	Substitute
Tuesday	08:00 AM - 03:30 PM	08:00 AM - 03:30 PM

Specified Substitute:
Assigned Substitute:

Create Absence

Create Job

Create Absence Verification

Job Number: 24378

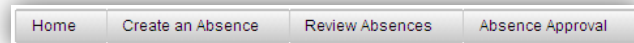
Job Status: Approval Pending/Open
 Employee: Karen Anderson
 Location: Sunnyland Elementary
 Classification: Grade 4

Job Creation - Successful.

COMPLETE! You MUST receive a Job Number for your absence to be recorded in the system and to receive a substitute.

Review/Modify/Cancel Absences

1. Click the **Review Absences** Menu.
2. Search for absences by date range or enter the job number. Dates can be any date in the past, present, or future.
3. The default is to display the results in List View. Click the Calendar radial button to display your absences in Calendar format. The start and end times of the job are displayed.



Review Absences

Review Absences
Display Format: List Calendar

Search From: To:
(MM/DD/YYYY) (MM/DD/YYYY)

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

Calendar View

September 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18 23 07:30 AM - 04:00 PM	19 23 07:30 AM - 04:00 PM	20 23 07:30 AM - 04:00 PM	21
22	23	24	25	26	27	28
29	30					

List View

Job #	Start Date/Time	Location	Reason
	End Date/Time	Classification	Substitute
15810	10/14/2009 11:20 AM	Heritage Elementary - other	Professional - Primary
Cancelled	10/14/2009 03:20 PM	Grade 4	Wilkerson, Sharon
<u>17875</u>	11/12/2009 07:20 AM	Heritage Elementary - other	Professional - Primary
	11/12/2009 03:20 PM	Grade 4	Aulogia, Victoria
<u>19316</u>	01/07/2010 07:20 AM	Heritage Elementary - other	Professional - Primary
	01/07/2010 03:20 PM	Grade 4	Schmeller, Mirra

4. Clicking the **job number** link displays the Review Absence Detail screen. You can view, update or cancel future absences.
5. To **cancel an absence**, click the **Cancel Job** button.

Review Assignments

Review Absence Detail

Job Number: 24378
Job Status: Approval Pending/Open
Location: Sunnyland Elementary
Classification: Grade 4
Reason: Professional Development
Voice Instructions: None
Text Instructions:

File Attachments: None

Add a File: (Maxi

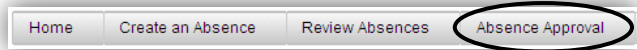
Start Date: 02/01/2011
End Date: 02/01/2011
Weekly Schedule: **Employee** **Substitute**
Tuesday 08:00 AM - 03:30 PM 08:00 AM - 03:30 PM
Specified Substitute: None
Assigned Substitute: Approval Pending
 Notify the substitute of a cancellation?

The system will notify the substitute of the cancelled job by placing a telephone call. Uncheck the "Notify" checkbox, if the assigned substitute does not need to be notified of the cancellation.

The Cancel Job button may not appear on the screen depending on your district's policies regarding cancelling absences. Please contact your School Administrator if you do not have the ability to cancel your absence.

Absence Approval

1. Click the **Absence Approval** Menu.
2. Enter the dates for the search, choose the location of the absence requests, and select the status or statuses for your search. Click Search.
3. The Absence Approval List displays summary information on the absence request.



Absence Approval

Search From: To:
(MM/DD/YYYY) (MM/DD/YYYY)

Location:

Status: Pending Approved Denied Cancelled

Records Per Page:

Absence Approval

Search From: To:
(MM/DD/YYYY) (MM/DD/YYYY)

Location:

Status: Pending Approved Denied Cancelled

Records Per Page:

Absence Approval List

Job #	Start Date	End Date	Reason	Status	Level	Last Action By	Last Action
191	07/26/2010 08:00 AM	07/26/2010 04:00 PM	REASON ABSENCE 001	Pending	0/1	Todd,Karen	Submitted

An Absence Approval status can be:

- ✓ Pending (Approval)
- ✓ Approved
- ✓ Denied
- ✓ Cancelled

The Level field shows the approvals received highest level compared to the reason level required.

4. Click the **Level** link to display the **Absence Approval History** log for the request. The log shows the history of actions performed on the request for each level.

Absence Approval History

Job Number: 243

Action	Person	Date	Status
Submitted	Brown,Brett	09/01/2010	Pending
Denied	OPERATOR,ALL	09/01/2010	Denied

Creating and Modifying 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.

Creating Absences




Absences can be reported for today, tomorrow, or for specific dates in the future.

1. Call the main system number and enter your Access ID and PIN, both followed by the star (*) key. Select "1" to create an absence.
2. If you have multiple locations and classifications in your profile, select one from the list. **NOTE:** *If you have multiple schedules for the same classification, you may not be able to create your absence on the telephone. You will be able to create the absence on the Web.*
3. Select the absence start/end dates. Indicate whether the absence is only for today, tomorrow, or if you want to enter the dates. Use MMDD format.
4. Select the absence start/end times. The default times for the absence location will play. Accept the default or enter specific times. Use HHMM format. Either the 12-hour clock or military times. Indicate am or pm for the 12-hour clock. If a multiple day absence, each day's times must be confirmed. The absence times are also used for the substitute times.
5. Select a reason for the absence and press the star (*) key. A list of reasons is played, but the reason can be entered at any time.
6. Record special instructions for the substitute. The substitute will know the dates, times, location, classification of the absence and your name.
7. Choose if a substitute is required for the absence.
8. If a substitute is needed, you may specify or prearrange a substitute. Requesting a substitute means that only the specified substitute will be called for that job until the following occurs:
 - A set time designated to release the job to other substitutes
 - The specified substitute declines the job
 - The specified substitute becomes unavailable for the date(s) and times of the job.The requested substitute can be prearranged. An absence is considered prearranged if you have talked with a substitute. Prearranged substitutes will not be called by the system. They have to access the system to obtain the job number.
9. Obtain the job number. Remain on the line and hear the job number played to you.

Reminder: No Job Number means that the absence has NOT been created!

Review/Cancel/Modify a Job

 After reporting an absence, you can call in and review or cancel an absence or modify the special instructions of a future absence.

1. Call the main number and enter your Access ID and PIN, both followed by the star (*) key.
2. Press “2” to review, cancel, or modify an absence.
3. Open and active jobs are played in date order. To view past jobs, use Web access. After each job is played, you can repeat the job information, hear the next job, modify special instructions, or cancel the job. To modify the job’s dates, times or reason information, you must cancel the job and then create a new absence.
4. When canceling a job that has an assigned substitute and if allowed, you will be asked to indicate if the system should call the assigned substitute. To confirm cancellation, please wait until the system says, “Job number **xxxxxx** has been cancelled.” If you do not stay on the telephone to hear the cancellation confirmation, there is no guarantee that the absence has been cancelled.

Entering Alphabetic Characters on the Telephone:

Press the digit that corresponds to the letter. For example, for A, B or C press 1.

If the system determines there are multiple codes that apply to the key presses, you will hear a list of codes. Choose the correct code from the list.