

David Douglas School District #40

Secretary Training

November 19, 2014

SmartFindExpress (SFE)

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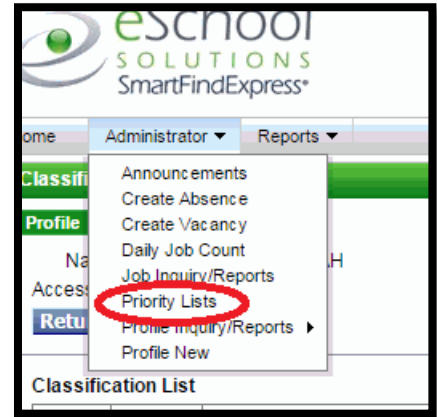
General Information

Please remember that regular sub jobs must be in 4 or 8 hour increments. If a teacher accidentally puts a job in for 4-1/4 hours, please offer the sub the option for working an 8 hour job. If they decline, our practice is to pay the sub for 4-1/4 hours not 8. If a sub is late let them know that in order to be paid for the all the hours that job was listed they will need to stay to make up the time missed. **NOTE:** SFE does not update/correct job hours.

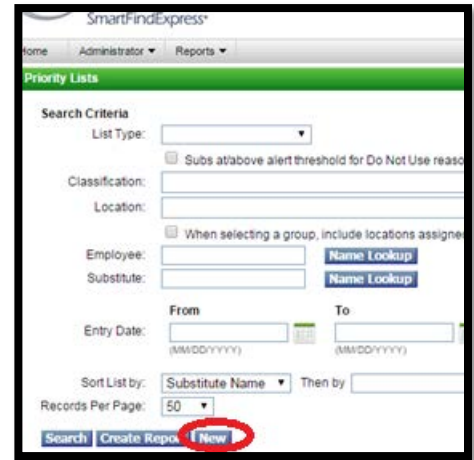
While licensed staff are expected to call in / enter their own absences, they do have limitations on when they can create an absence and what they can do after they click create. Licensed staff can enter absences any time before the day of the absence and up to 11:59 pm on the day of the absence, after that their building or program secretary will have to enter the absence on behalf of the Licensed Staff member. Licensed staff can cancel a future absence but cannot edit some of the job parameters, such as the date and reason. Licensed staff **do not** have access to enter comments in the administrative note field, please check regularly for workshop / conference absences, (even those that do not require a sub) and add to the admin notes section what workshop / conference or event the teacher attended. Check with Curriculum or Special Ed for Workshop / Conference budget numbers. Licensed staff **cannot** create their own priority/preferred list.

How to set up a Priority/Preferred list

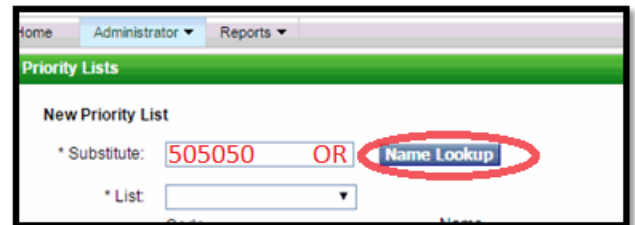
To create a priority/preferred list go to your Administrator drop down box in SFE. The 6th option down is priority lists. See picture to the right. Click Priority Lists.



Click new - See Picture to right -this will take you to the page where you can set up a priority/preferred list for your school or for a specific teacher.



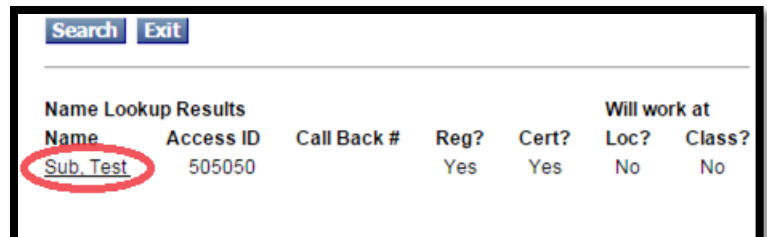
Fill in the preferred subs access ID by typing in the number or using the name lookup button (See below).



If using the name look up button enter partial name information and click search.



Select the substitute you want from the list and click, this will take you back to the new priority list set up screen.



The list type should be preferred.

Classification can be left blank

Select your location **or** a teacher's access id number.

Sub list should always be 1.

Level should be 1, 2, 3, 4 or 5 for an employee preferred list.

Level should be 1 for location preferred list.

These numbers tell the SFE system in what order to call Subs in.

Enter any comments.

Click save

If you do not get a saved successfully message, you can check to make sure your list was saved by clicking save again. If your priority list has already been created you will get the error message to the right.

To see priority/preferred lists that are set up for your location or teachers:

Go to your Administrative drop down box and select priority list.

Select list type preferred

Select your location

Click search.

This will bring up all priority/preferred lists for your location.

Error - Priority record already exists.

If a sub on your schools priority list is not getting calls please let Human Resources or Payroll know and we will contact SMF and get the situation resolved.

You can find more information on Priority /Preferred lists in the SmartFind Express Administrative user Guide on pages 19-21.

Issues to look for with Long Term Subs

Non Student Contact Days

There are 3 types of situations that can happen on non-student contact days where the teacher is regularly scheduled to work and the Long Term Substitute (LTS) is working on that day.

1. The job is entered into SFE and it shows up with the sub working that day and it shows on the draft monthly report – All that needs to be done is mark the job verified.
2. The job is entered into SFE and it does NOT show up on the draft Substitute Time monthly report. You have a couple of steps that need to be done:
 - a. Create a vacancy using Substitute Long Term Job (LTJ) Calendar, fill in all appropriate information.
 - b. In the administrator comments please reference the original job # and the teacher who was being covered.
 - c. Click “continue”.
 - d. Once all information has been verified click “create Vacancy”.
 - e. Find the job and check the verified button and save (Verification can only be done after the job is finished).
3. The Absence can be created for the teacher but the system will not allow a sub to be entered on the non-student contact day.
 - a. Create Absence and use the no sub required button.
 - b. Create a vacancy using Substitute LTJ Calendar, fill in all appropriate information.
 - c. In the administrator comments please reference the Absence job # and the teacher who was being covered.
 - d. Click “continue”.
 - e. Once all information has been verified click “create Vacancy”.
 - f. Find the job and check the verified button and save (Verification can only be done after the job is finished).

Parent Teacher Conferences

In order to pay the LTS the correct amount of hours, the job will need to be changed to 12 hours for the sub. The absence for the teacher needs to stay at 7-1/2 hours. Update the hours and in the administrative comments enter Parent Teacher Conferences then click save.

Sub needs a sub

If your LTS for some reason cannot come in when scheduled please update the job for the day by cancelling the assigned LTS sub and either inputting the new sub or have a call out start again. If the job has been put in as a date range you may need to split the job so that you can change the Sub on the one day only. If a LTS misses a day that will start their rate of pay back to the regular sub rate unless your principal requests that the sub continue at the long term rate.

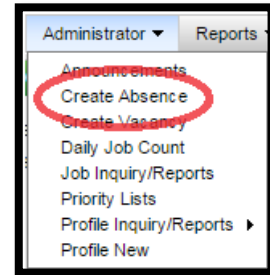
Teacher Coverage

Situation #1 – Elementary period teacher coverage. Elementary Teachers are not set up as substitutes and therefore period teacher coverage cannot be set up in SFE. Please continue using the paper PR 5 Elementary School Teacher Coverage Reimbursement form.

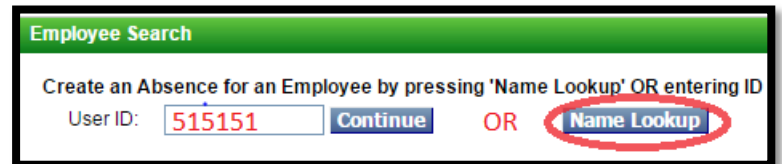
Situation #2 – Middle or high period teacher coverage one period only. A middle or high school teacher has an event (i.e.; meeting, workshop/conference or other event) that will not need a full or half day sub.

Go to your Administrator drop down.

Select Create Absence.



Fill in the employee access ID by typing in the number or using the name lookup button (See below).



If using the name look up button enter partial name information and click search.



Click on employee - This will take you to where the absence is created.

Name Lookup Results				
Name	Access ID	Location	Classification	Status
Employee. Test	515151	DD-ALICE OTT MIDDLE SCHOOL	DDL-1ST GRADE	Active
Sub. Test	505050	DD-DAVID DOUGLAS DISTRICT OFFICE	DDO-LICENSED (NO SUB)	Inactive

The Location should auto fill
 Classification should auto fill
 Please enter the reason for the
 time gone as either:

- Bereavement Leave
- Emergency Leave
- Family Illness
- Jury Duty
- Personal Business
- Sick Leave
- Union Business
- Unpaid Leave
- Workshop/Conference

If the budget code field is left blank, the system will automatically input the budget code for everything **except** Workshop / Conference. Please check with Curriculum or Special Ed for Workshop / Conference budget numbers.

Is Substitute Required?

Click yes.

Enter date

Make the weekly schedule
 match the date selected.

The absence time should
 be the total time the
 teacher is out.

The Substitute time
 should be the time that is
 being covering.

Weekly Schedule		Absence		Substitute	
		Start Time (hh:mm am)	End Time (hh:mm am)	Start Time (hh:mm am)	End Time (hh:mm am)
Monday	<input type="checkbox"/>	07:30 AM	03:00 PM	07:30 AM	03:00 PM
Tuesday	<input type="checkbox"/>	07:30 AM	03:00 PM	07:30 AM	03:00 PM
Wednesday	<input checked="" type="checkbox"/>	07:30 AM	03:00 PM	10:35 AM	12:10 PM
Thursday	<input type="checkbox"/>	07:30 AM	03:00 PM	07:30 AM	03:00 PM
Friday	<input type="checkbox"/>	07:30 AM	03:00 PM	07:30 AM	03:00 PM

Fill in the covering teacher's access ID by typing in the number or using the name lookup button (See next page).

If using the name look up button enter partial name information and click search.

Substitute Name Lookup

Enter Name (or partial name), then press Search

Last Name:

First Name:

Records Per Page:

Begins with Contains

Begins with Contains

Select the substitute you want from the list and click, this will take you back to the job set up screen.

Name Lookup Results

Name	Access ID	Call Back #	Reg?	Cert?	Loc?	Class?
Sub. Test	505050		Yes	Yes	No	No

Please select yes on has the Sub accepted the job. (If this does not get clicked the system will start calling out to get the job filled.)

If there are any instructions for the covering teacher that need to be input please do so.

Substitute

Specify a Substitute? ID: Sub, Test

PRE-ARRANGED?

If the specified substitute has accepted this assignment and does not need to be covered

Has the substitute accepted this job? Yes No

Substitute Instructions:

File Attachments: No file chosen (M)

In Administrator comments please put "teacher coverage, what period it is and why the coverage was needed".

Click continue.

Administrator

Comments:

Verify the information and if everything is correct click create absence.

Please fill out a paper PR5 and write SFE job number in top corner then send to payroll.

Create Job

Create Absence Confirmation

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

Job Status: **Active/Pre Arranged**

Employee: Employee, Test

Location: DD-ALICE OTT MIDDLE SCHOOL

Classification: DDL-1ST GRADE

Reason: Workshop/Conference (68)

Budget Code: None

Voice Instructions: None

Text Instructions: None

File Attachments: None

Dates: 11/19/2014 - 11/19/2014

Weekly Schedule: Employee Substitute

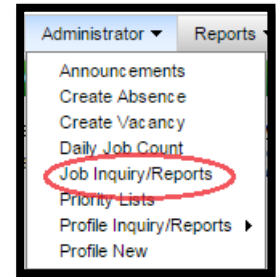
Wednesday 07:30 AM - 03:00 PM 10:35 AM - 12:10 PM

Specified Substitute: Sub, Test

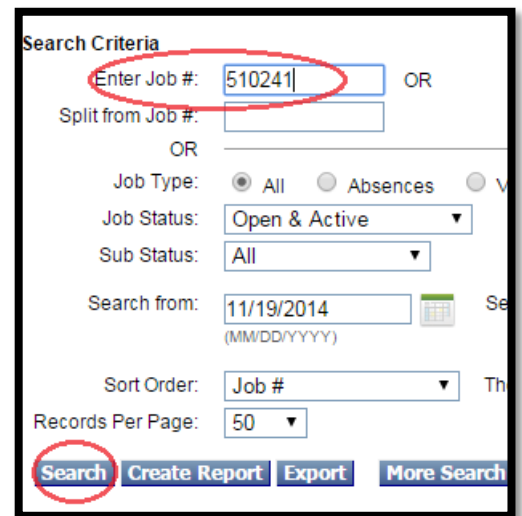
Assigned Substitute: Sub, Test

Situation #3 - Middle or high period teacher coverage all day. A middle or high school teacher that has an event (i.e.; meeting, workshop/conference, other event or regular absence) that needs a full or half day sub and the job did not fill or the scheduled substitute cancelled and Teacher Period Coverage needs to be used.

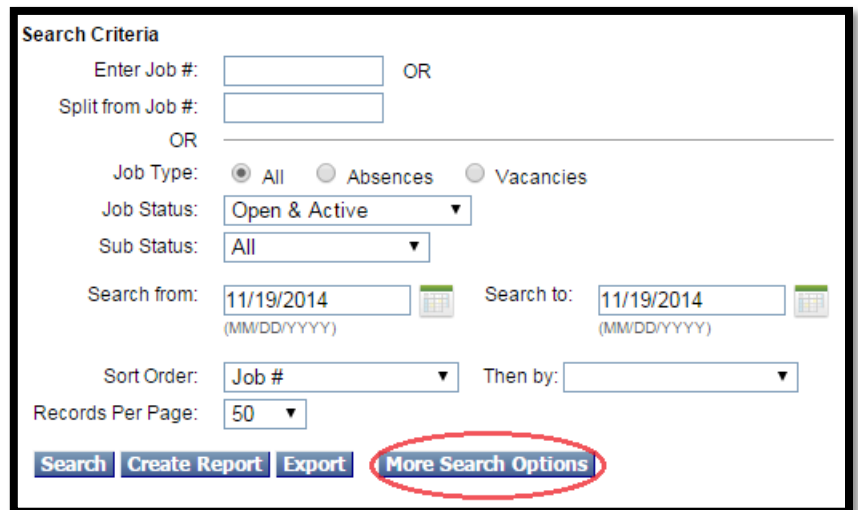
Go to your Administrator drop down.
Select Job Inquiry/Reports.



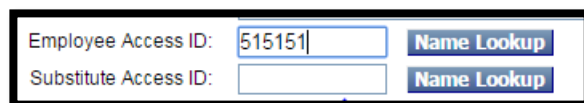
If you know your job# you can enter and click search



If you do not know your job number,
Enter the date and click More Search Options



This will give you the option to search by employee
Click Search



Click on the job

This takes you to job detail where you can modify the job.

Job List		
Set All to Verify Save Verified		
Job #	Employee Name	Substitute Name
Status	Job Start	Sub Start
	Job End	Sub End
Verify	Job Duration	Sub Time Worked
510922	Employee, Test	Open
Open	11/18/2014 07:30 AM	11/18/2014 07:30 AM
Open	11/18/2014 03:00 PM	11/18/2014 03:00 PM
	07:30	

Click Split job. This will allow you to break up the original job into segments and enter multiple teachers as substitutes.

Job Detail			
Job Number:	510922	Location:	DD-ALICE OTT MIDDLE SCHOOL
Status:	Open/Open	Classification:	DDL-1ST GRADE
Employee:	<u>Employee, Test</u>	Calendar:	NW - Northwest Regional ESD
Access ID:	515151	Search Rule:	Instructional Search Rule
		Step:	Preferred-Employee
Create Report Filling Details Split Job Reset Return To List Stop Callout Save			

You will get the message to the right.

Click yes.

Split Job Confirmation ✕

This job will automatically be stopped from callout and the callout will be re-started after splitting the job successfully. Are you Sure you want to continue?

You should get a screen like this.

Take the gray box and move it to the left. Another line will appear below (see next page).

Split Job

Job Number: 510922
Location: DD-ALICE OTT MIDDLE SCHOOL
Classification: DDL-1ST GRADE
Employee: Employee, Test
Access ID: 18957

Job Times

Date	Day	Times	
11/18/2014	Tuesday	7:30 AM - 3:00 PM	<input type="checkbox"/>

[Continue](#) [Cancel](#)

Continue moving the gray box to the left until you have the day split into as many segments as needed. Once you are done click continue.

Job Times			Continue Cancel
Date	Day	Times	
11/18/2014	Tuesday	7:30 AM - 7:59 AM	
11/18/2014	Tuesday	8:00 AM - 9:32 AM	
11/18/2014	Tuesday	9:33 AM - 10:15 AM	
11/18/2014	Tuesday	10:16 AM - 11:00 AM	
11/18/2014	Tuesday	11:01 AM - 12:33 PM	
11/18/2014	Tuesday	12:34 PM - 1:59 PM	
11/18/2014	Tuesday	2:00 PM - 3:00 PM	

Click expand all. This will allow you to see the links to all the segments where you can update information on each segment

Split Job Review

Based on your selection, below is the list of jobs and their corresponding job segments. The first job retains the job number. Newly created jobs receive a new job number. Please review and click **Confirm** to proceed. If you want to revisit your selection, click **Back**.

[Expand All](#) [Confirm](#) [Back](#)

- ▶ Segments for job [11/18/2014 07:30 AM - 11/18/2014 07:59 AM]
- ▶ Segments for job [11/18/2014 08:00 AM - 11/18/2014 09:32 AM]
- ▶ Segments for job [11/18/2014 09:33 AM - 11/18/2014 10:15 AM]
- ▼ Segments for job [11/18/2014 10:16 AM - 11/18/2014 11:00 AM]

Under each job segment you can enter the teacher who is covering that part of the day. After all segments are covered click confirm.

Split Job Review

Based on your selection, below is the list of jobs and their corresponding job segments. The first job retains the job number. Newly created jobs receive a new job number. Please review and click **Confirm** to proceed. If you want to revisit your selection, click **Back**.

[Expand All](#) [Confirm](#) [Back](#)

- ▶ Segments for job [11/18/2014 07:30 AM - 11/18/2014 07:59 AM]
 - [Edit Substitute](#) ▶
11/18/2014 Tuesday
- ▶ Segments for job [11/18/2014 08:00 AM - 11/18/2014 09:32 AM]
 - [Edit Substitute](#) ▶
11/18/2014 Tuesday

Substitute Detail

Assigned Substitute:

Specified Substitute:

[Done](#)

You will get a message



And the following screen:

Job List

*The jobs created as a result of this split are listed below. Please click on the job links to adjust substitutes or make other job specific changes to the job. Click **Done** after you are finished.*

Done

▼ Job Number - 510922

510922	Employee, Test	Sub,Test	DD-ALICE OTT MIDDLE SCHOOL	11/17/2014 11:07 PM	No
Active/	11/18/2014 07:30 AM	11/18/2014 07:30 AM	DDL-1ST GRADE	21.44	No
Admin Assigned	11/18/2014 07:59 AM	11/18/2014 07:59 AM	Sick Leave		No
	00:29				No

▶ Job Number - 510926

▶ Job Number - 510927

▶ Job Number - 510928

▶ Job Number - 510929

▶ Job Number - 510930

▶ Job Number - 510931

You can click on each job, update the admin notes. Please put “teacher coverage, what period, why the coverage was needed and the original Job number”.

Click save and then return to list.
Do each job segment until done.

Administrator Comments:

File Attachments: None

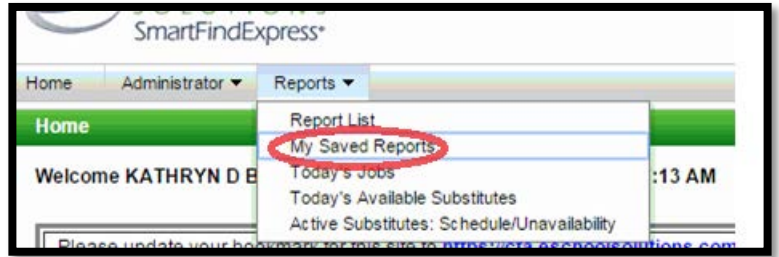
Please fill out a paper PR5 and write SFE job number in top corner then send to payroll.

Monthly reports

Run your draft monthly Employee and Substitute reports on the 1st working day of the month for the previous month. You are checking that all employee absences are entered, that dates absent are correct, that the time for the employee and the substitute are correct, that budget numbers are entered on the workshop / conference jobs.

Go to the Reports dropdown menu.

Select My Saved Reports.

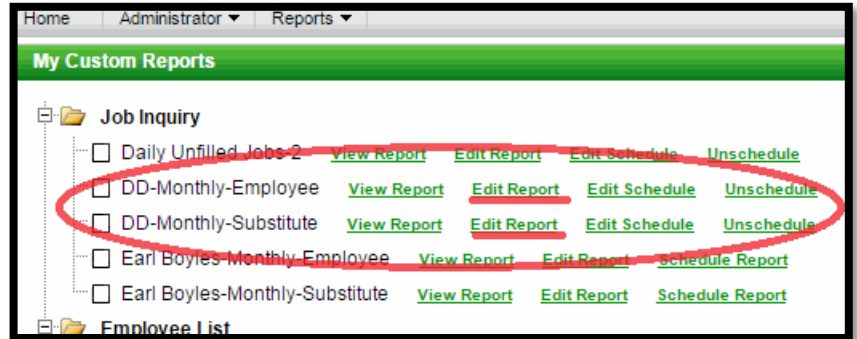


You will see something similar to the picture on the right:

You will need to edit both the DD-Monthly-Employee and DD-Monthly-Substitute reports.

One at a time select Edit Report.

See the below for instructions:



Change the date to reflect the month you are running the report for.

Your location group does not need to be changed, it has been set up to default to your correct location.

Check your sort orders as you may want to change them.

A screenshot of the 'DD-Monthly-Employee' report criteria form. The form includes fields for 'Enter Job #', 'Job Type' (radio buttons for All, Absences, Vacancies), 'Job Status' (dropdown), 'Sub Status' (dropdown), 'Search from' (10/01/2014, circled in red), and 'Search to' (10/31/2014, circled in red). Below these are dropdown menus for 'Classification', 'Classification Group', 'Location', 'Location Group' (DD - ALL DAVID DOUGLAS, circled in red), and 'Reason'. There are also input fields for 'Employee Access ID', 'Substitute Access ID', and 'Budget Code'. At the bottom, there are 'Reported Date' and 'Accepted On' (both with calendar icons), 'Sort Order' (Employee Name, circled in red), 'Then by' (Start Date, circled in red), and 'Output Format' (PDF).

You should not have to change the print details, these have been set up for you. The External ID under employee maybe uncheck if needed.

You do not need to have anything selected for print totals for Primary Sort.

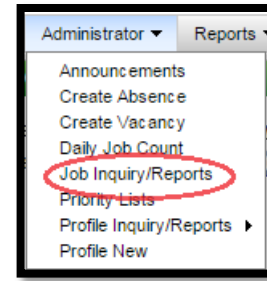
For the Print Totals at the end of the report “Select Totals by Reason” and “Totals by job Status”.

Please Change the “Report Title” to include your school/location, (you will only need to do this once).

Click Save and View.

Click overwrite – A PDF report will be generated that you can print and use to review. Update any information in SFE that needs to be. After everything is correct for both the Substitute and Employee Reports you will need to mark all the jobs verified.

Go to your Administrator drop down.



Select Job Inquiry/Reports.

Search Criteria should look like the picture to the right.

- Job type all,
- Job Status All, Exclude canceled,
- Sub Status all,
- Select the date range you want
- Select a sort order.
- Change your Records per page.
- Click search.

A screenshot of the 'Search Criteria' form. The form includes fields for 'Enter Job #', 'Split from Job #', 'Job Type' (radio buttons for All, Absences, Vacancies), 'Job Status' (dropdown menu with 'All, exclude canceled' selected), 'Sub Status' (dropdown menu with 'All' selected), 'Search from' and 'Search to' date pickers (both showing 10/01/2014 and 10/31/2014 respectively), 'Sort Order' (dropdown menu with 'Employee Name' selected), and 'Records Per Page' (dropdown menu with '100' selected). The 'Search' button is circled in red, and a red arrow points to the 'Sort Order' dropdown.

- Click Set All to Verify
- Click Save Verified.

Job List

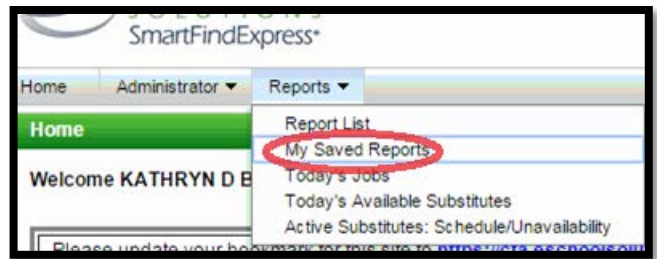
[Set All to Verify](#) [Save Verified](#)

Job #	Employee Name	Substitute Name	Local
Status	Job Start	Sub Start	Class
Verify	Job End	Sub End	Reas
	Job Duration	Sub Time Worked	Budg
482114	Vacancy	WALKER,STEPHEN	DD-F
Finished/	10/22/2014 07:30 AM	10/22/2014 07:30 AM	DDL
Web Sub Search	10/22/2014 03:30 PM	10/22/2014 03:30 PM	Work
<input type="checkbox"/>	08:00	08:00	100.0
482345	Vacancy	MILLER,JOAN	DD-V
Finished/	10/02/2014 08:00 AM	10/02/2014 08:00 AM	DDC
IVR Assigned	10/02/2014 04:00 PM	10/02/2014 04:00 PM	Vaca
<input type="checkbox"/>	07:30	07:30	
482348	Vacancy	MILLER,JOAN	DD-V
Finished/	10/14/2014 08:00 AM	10/14/2014 08:00 AM	DDC
Web Sub Search	10/14/2014 04:00 PM	10/14/2014 04:00 PM	Vaca
<input checked="" type="checkbox"/>	07:30	07:30	
482348	Vacancy	MILLER,JOAN	DD-V
Finished/	10/15/2014 08:00 AM	10/15/2014 08:00 AM	DDC
Web Sub Search	10/15/2014 04:00 PM	10/15/2014 04:00 PM	Vaca
<input checked="" type="checkbox"/>	07:30	07:30	

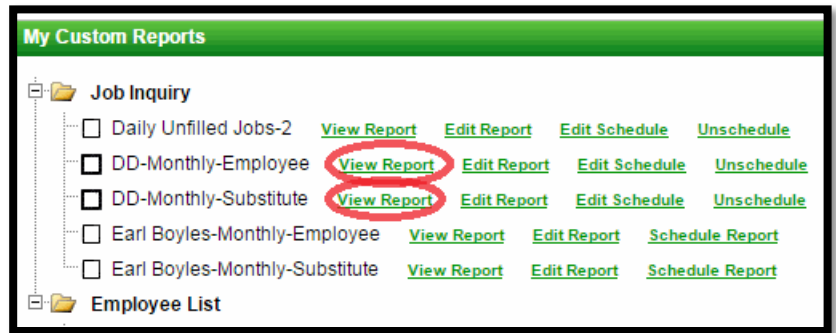
[Next](#)

Repeat for all pages generated.

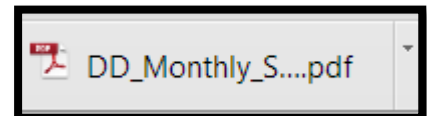
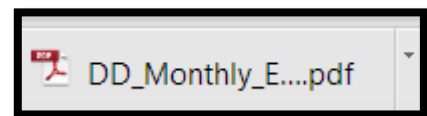
After all your jobs have been verified go back to My Saved Reports.



Click View Report for both the employee and substitute reports.



Print both of the PDF files that are generated and have your Principal sign both reports and pony to payroll.



2014-15 School Year December – June Monthly reports dates

Month	DUE DATE	DELIVERABLES
December 2014 - November hours worked	1st	Pull Draft Report Changes must be input by 4pm on the 4th
	5th	Due date for Final reports must be signed by Principal
January 2015 - December hours worked	5th	Pull Draft Report - Changes must be input by 4pm on the 6th
	7th	Due date for Final reports must be signed by Principal
FEBRUARY 2015 - January hours worked	2nd	Pull Draft Report Changes must be input by 4pm on the 4th
	5th	Due date for Final reports must be signed by Principal
MARCH 2015 - February hours worked	2nd	Pull Draft Report Changes must be input by 4pm on the 4th
	5th	Due date for Final reports must be signed by Principal
APRIL 2015 - March hours worked	1ST	Pull Draft Report Changes must be input by 4pm on the 3rd
	6th	Due date for Final reports must be signed by Principal
MAY 2015 - April hours worked	1st	Pull Draft Report Changes must be input by 4pm on the 4th
	6th	Due date for Final reports must be signed by Principal
JUNE 2015 - May hours worked	1st	Pull Draft Report Changes must be input by 4pm on the 3rd
	4th	Due date for Final reports must be signed by Principal
JUNE 2015 - June hours worked	15th	Pull Draft Report Changes must be input by 4pm on the Same Day
	16th	Due date for Final reports must be signed by Principal