

# New Substitute Experience User Guide

# New Substitute Experience User Guide

## How do I find and accept jobs?

### Steps:

- 1 Just sign in and you will see the jobs listed for you automatically!
- 2 If you want more information about a job, just hit the down arrow.
- 3 Once you decide to accept the job, you can tap the green checkmark under “Accept”, and you will have accepted the job. It’s that easy!
- 4 If a substitute **needs more details** to make their decision, they can select the down arrow to see more details on a job.

5

Date	Time	Duration	Employee	Classification	Location	Decline	Accept
Monday 2021/04/26	06:30 AM 07:00 AM	Custom Day	Emp 7001 Michael	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday 2021/04/27	06:30 AM 07:00 AM	Custom Day	Emp 7001 Michael	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday 2021/04/28	06:30 AM 07:00 AM	Custom Day	Emp 7001 Michael	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday 2021/04/29	06:30 AM 07:00 AM	Custom Day	Emp 7001 Michael	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*Requested Thursday 2021/04/29	08:00 AM 04:00 PM	Full Day	ZZ Test Employee	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Friday 2021/04/30	06:30 AM 07:00 AM	Custom Day	Emp 7001 Michael	ZZ Test Classification	ZZ Test Location	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 5 And training is done in real time right on the web! **Substitutes can Take a Tour** of the intuitive new interface

# New Substitute Experience User Guide

## How do I see my assigned, or active, jobs?

### Steps:

- 1 From the Home Page, select the “Active” tab. The layout is the same as the Available Jobs!
- 2 View all your Active Jobs from this page. If you need more information, just hit the down arrow.
- 3 You can also view your Active Jobs from your Calendar! Just select the “My Calendar” button.

Available	Active	Finished	Canceled	Unavailable	Add Unavailability	
Job ID	Date	Time	Duration	Employee	Classification	Location
5775	Monday 07/05/2021	07:30 AM 05:00 PM	Full Day	Emp 7001 Michael	ZZ Test Classification	Remote ZZ Test Location
5777	Wednesday 07/07/2021	07:30 AM 05:00 PM	Full Day	Emp 7001 Michael	ZZ Test Classification	Remote ZZ Test Location
5778	Thursday 07/08/2021	07:30 AM 05:00 PM	Full Day	Emp 7001 Michael	ZZ Test Classification	Remote ZZ Test Location

### What about jobs that were canceled?

- 4 From the Home Page, select the “Cancelled” tab. The layout is the same as the Available Jobs!

### Removing “Duration” Column on Available Jobs

**IF your district does not enable durations (in Parameters → Jobs → Job Creation).** We still kept the “Time” column so Substitutes know how long the job is.

Available	Active	Finished	Canceled	Unavailable	Add Unavailability	
Job ID	Date	Time	Employee	Classification	Location	
7572	Tuesday 07/20/2021	08:00 AM 04:00 PM	Manasa emp3737	Payroll Officer	Alabama	

Enable employee create absence form with allowed durations

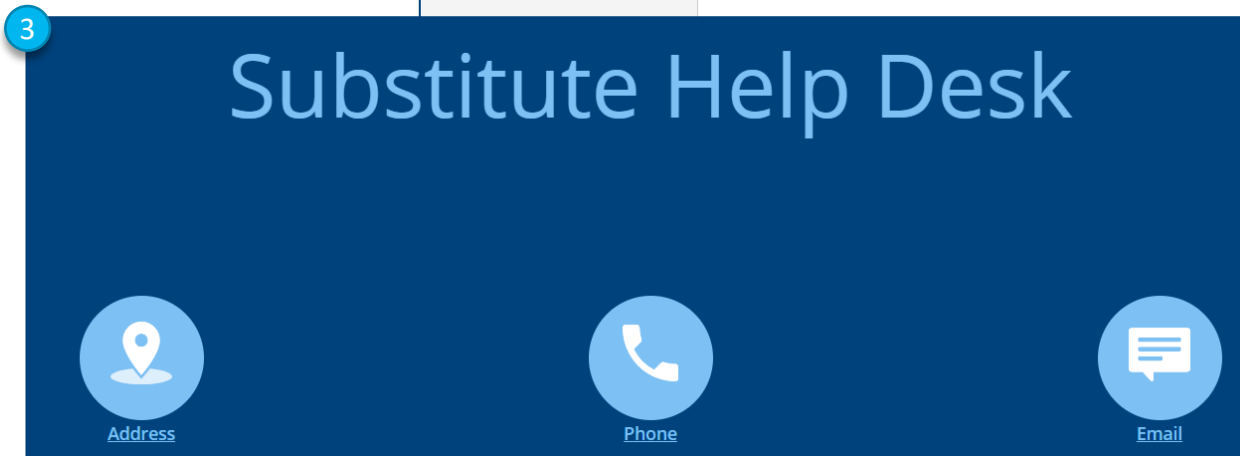
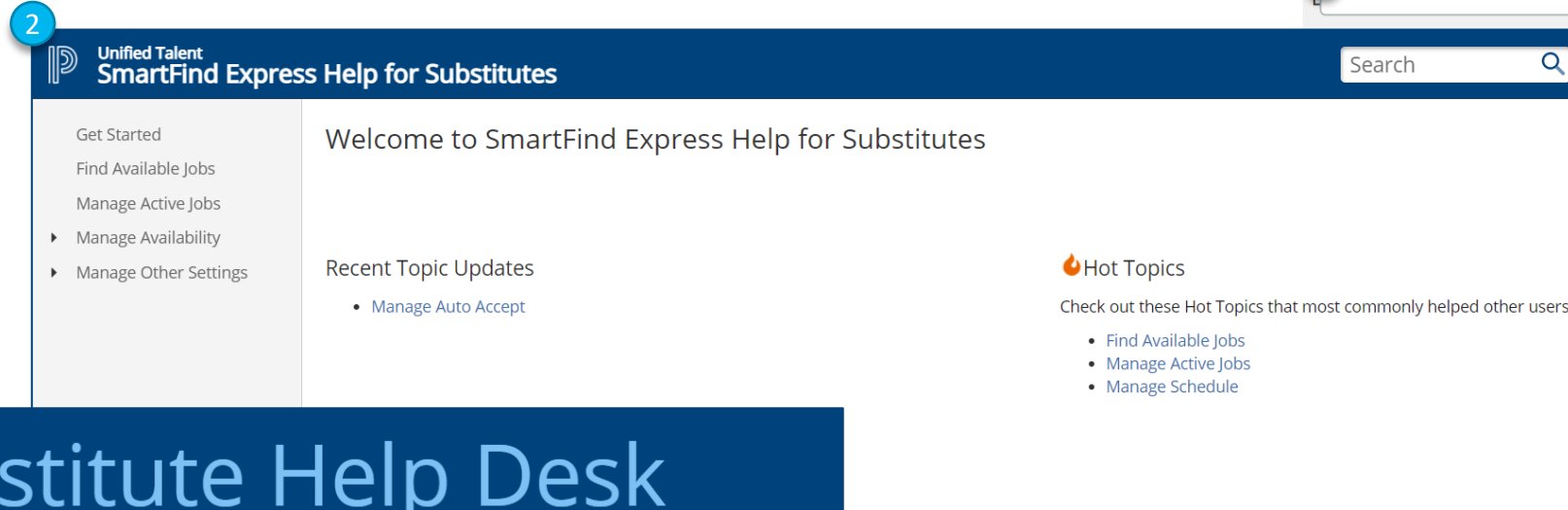
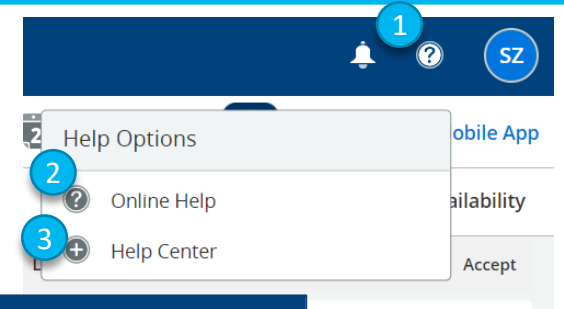
- Full Day
- Morning Half Day
- Afternoon Half Day
- Custom

# New Substitute Experience User Guide

## How do I find Help Documentation if I get lost?

### Steps:

- 1 The (?) icon on the top right will lead you to two pages:
  - “Online Help” (pictured to the right) – help documentation that is updated with every release and accessible from anywhere (no need to be logged in!).
  - “Help Center” – a page with your districts address, phone number, and email.



# New Substitute Experience User Guide

## How do I add Substitute Help Desk Information?

### Steps:

In SmartFind Express, from System Configuration > District menu, add the district information that will populate in the Help Center.

1



2

A screenshot of the 'District : General' configuration form. The form has two tabs: 'General' and 'Integrations'. Under the 'General' tab, there are several input fields: '\* District Name:' with the value 'PowerSchool', '\* Address Line 1:' with the value '1600 Lee Road', 'Address Line 2:', '\* City:' with a dropdown menu showing 'Winter Park', '\* State/Prov.:' with a dropdown menu showing 'Florida', and '\* Zip/Postal:' with the value '32789'. There is a blue button labeled 'Add City to the List' below the city dropdown. Below these fields is a section titled 'Substitute Help Desk Contact Information:' with three input fields: 'Phone:' with the value '459-586-6666', 'Extension:' with the value '123', and 'Email:' with the value 'SubstituteHelpDesk@district.com'. A 'Save' button is located at the bottom left of the form.

3

## Substitute Help Desk



Address  
1600 Lee Road



Phone  
459-586-6666  
Extension:123



Email  
SubstituteHelpDesk@district.com

# New Substitute Experience User Guide

## How do I add unavailability and why should I?

### Steps:

- 1 Select the “Add Unavailability” button on the top right of your screen, and a modal will pop up.
- 2 Select when you will be available (this is required!).
- 3 Then select the time and duration of your unavailability. If you don’t want to receive communication all day, select “All Day”. If you are only unavailable for a short time (i.e., doctor’s appointment), you can select “Custom Time”
- 4 If you want to keep receiving communication (calls, texts) from SmartFind Express when you’re unavailable, select this checkbox to turn it ON, meaning you will receive communication.

Available Active Finished Canceled Unavailable

Date	Time	Duration
Monday 2021/04/26	06:30 AM 07:00 AM	Custom Day
Tuesday 2021/04/27	06:30 AM 07:00 AM	Custom Day
Wednesday 2021/04/28	06:30 AM 07:00 AM	Custom Day
Thursday 2021/04/29	06:30 AM 07:00 AM	Custom Day
*Requested Thursday 2021/04/29	08:00 AM 04:00 PM	Full Day
Friday 2021/04/30	06:30 AM 07:00 AM	Custom Day

April 23, 2021 10:10 AM 28 My Calendar SFE Register for the Mobile App

1 + Add Unavailability

2 Select Date

Start Date (Required) End Date (Required)  
MM/DD/YYYY MM/DD/YYYY

3 Time/Duration

All Day  
 Custom Time

4 Future Calls  
 Continue receiving calls during periods of unavailability

5 Cancel Save

- 5 Select “Save”, and your unavailability will be saved!

### Why Should I Add An Unavailability?

Adding an Unavailability tells your district that you are unable to work that date or time period. There are many reasons substitutes use unavailability:

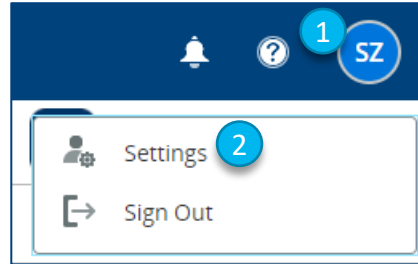
- You are going on vacation and want to unplug
- You have a doctor's appointment
- It's your birthday and you need a day off!

# New Substitute Experience User Guide

## How do I set up Auto Accept?

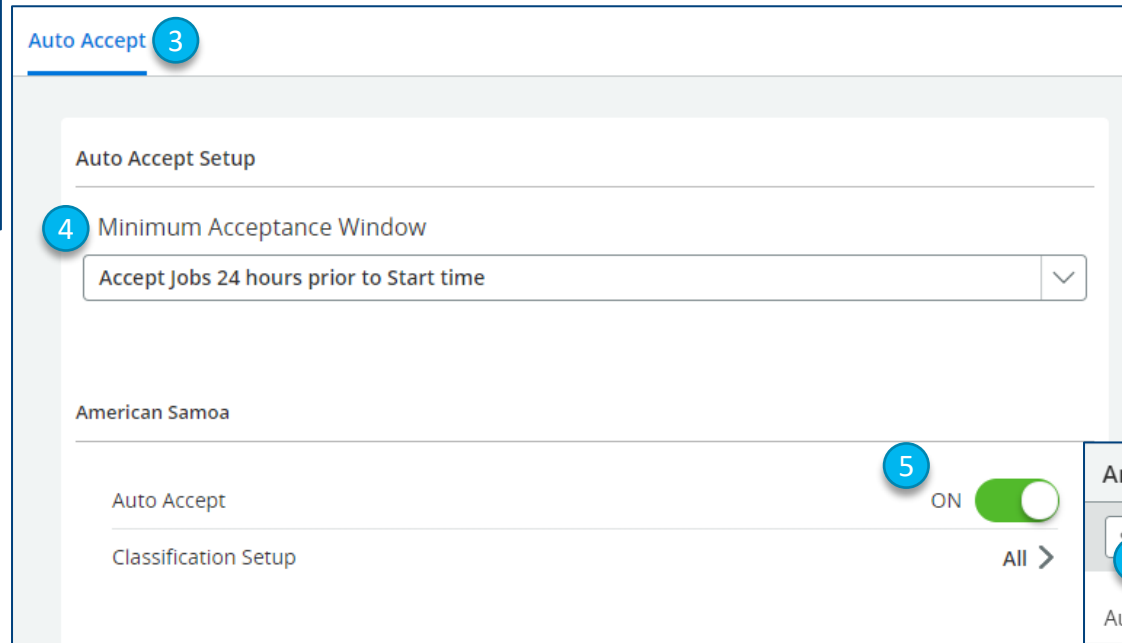
### Navigation Steps:

- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"
- 3 Then select "Auto Accept".



### Configuration Steps:

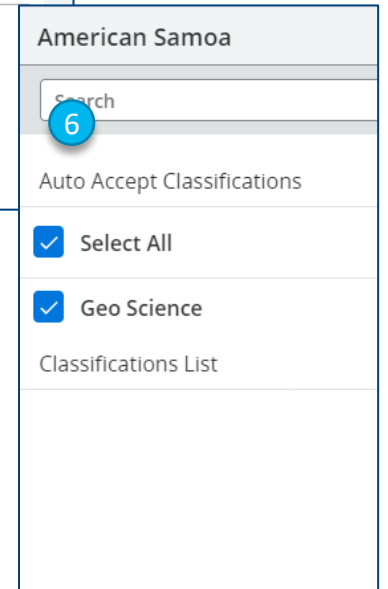
- 4 The Minimum Acceptance Window (MAW) makes sure you don't auto accept a job that starts in 20 minutes! Select whichever window you prefer (24 hours is selected in the example).
- 5 For each location (American Samoa is selected in the example), turn ON the Auto Accept toggle if you want to Auto Accept jobs for that location.
- 6 You can also configure Auto Accept to only accept jobs for specific classifications for each location. For example, if you only want to Auto Accept Science jobs at American Samoa, you can do that! Just select the Classification Setup arrow and choose your classifications.



**!** Auto Accept is only available if your district allows it. If you do not see the Auto Accept option in your Settings, your district does not allow substitutes to auto accept jobs.

### Note:

Auto Accept has changed **and substitutes need to set up Auto Accept again once they adopt the new substitute experience.** We believe this

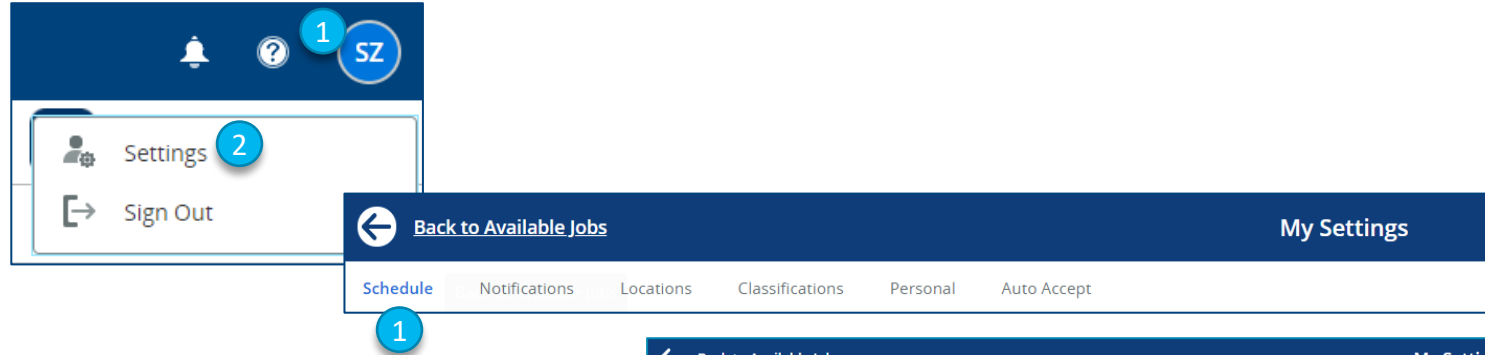


# New Substitute Experience User Guide

## How do I manage Profile Setting?

### Navigation Steps:

- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"



### Schedule Configuration Steps:

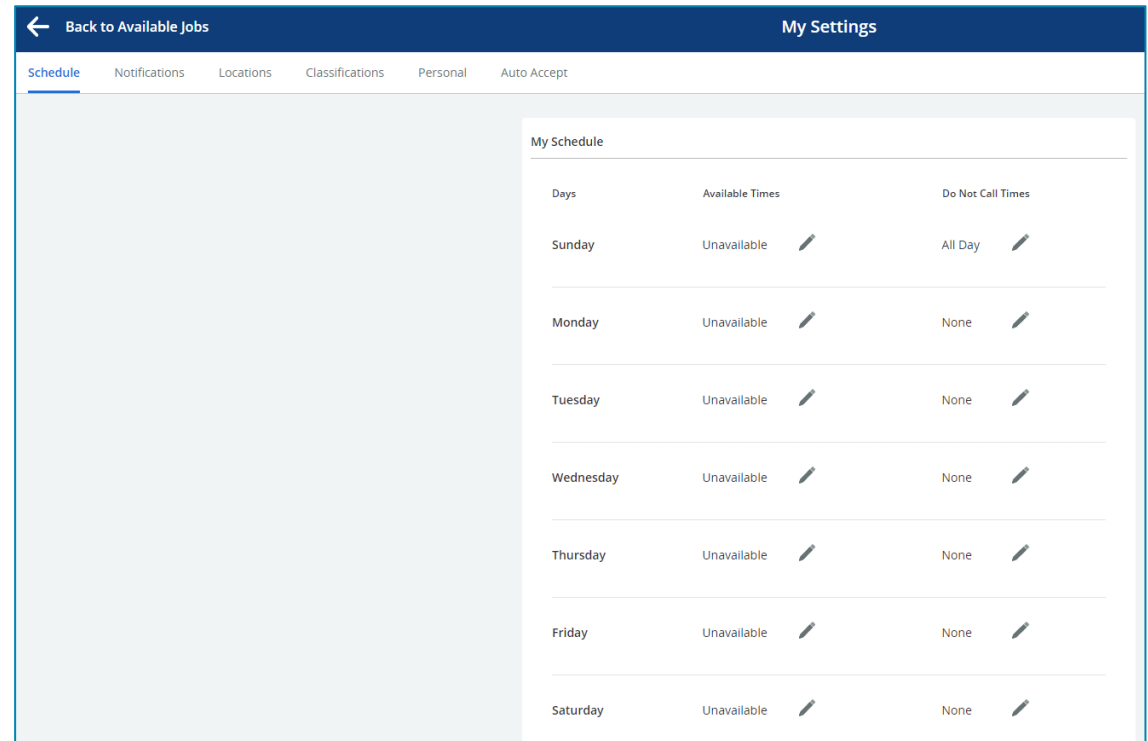
- 1 Select "Schedule"

For each day of the week, click **Edit (pencil)** to define **Available Times** and **Do Not Call Times**.

Click **All Day**, **Unavailable**, or **Custom**.

If custom, enter **Start Time** and **End Time**.

Click **Save**.



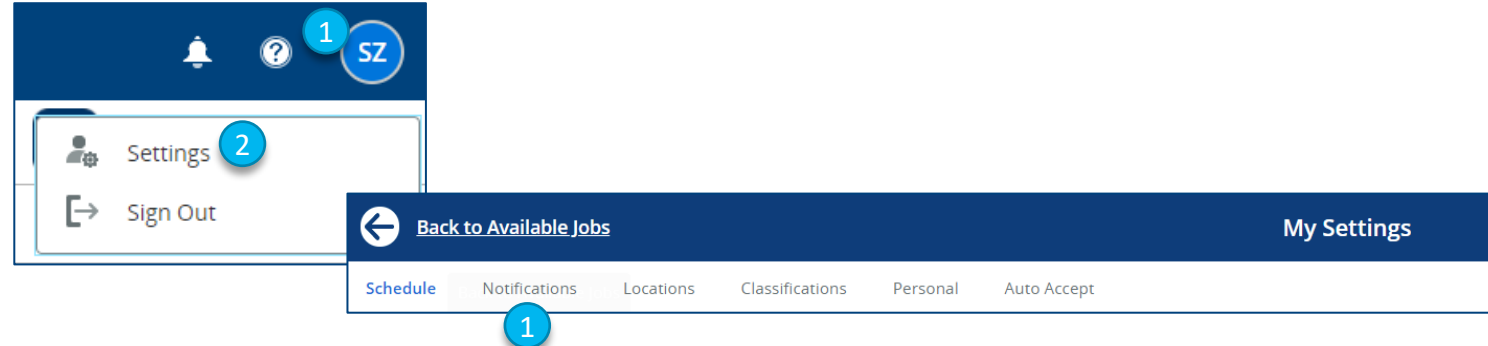


# New Substitute Experience User Guide

## How do I manage Profile Settings? Cont'd

### Navigation Steps:

- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"

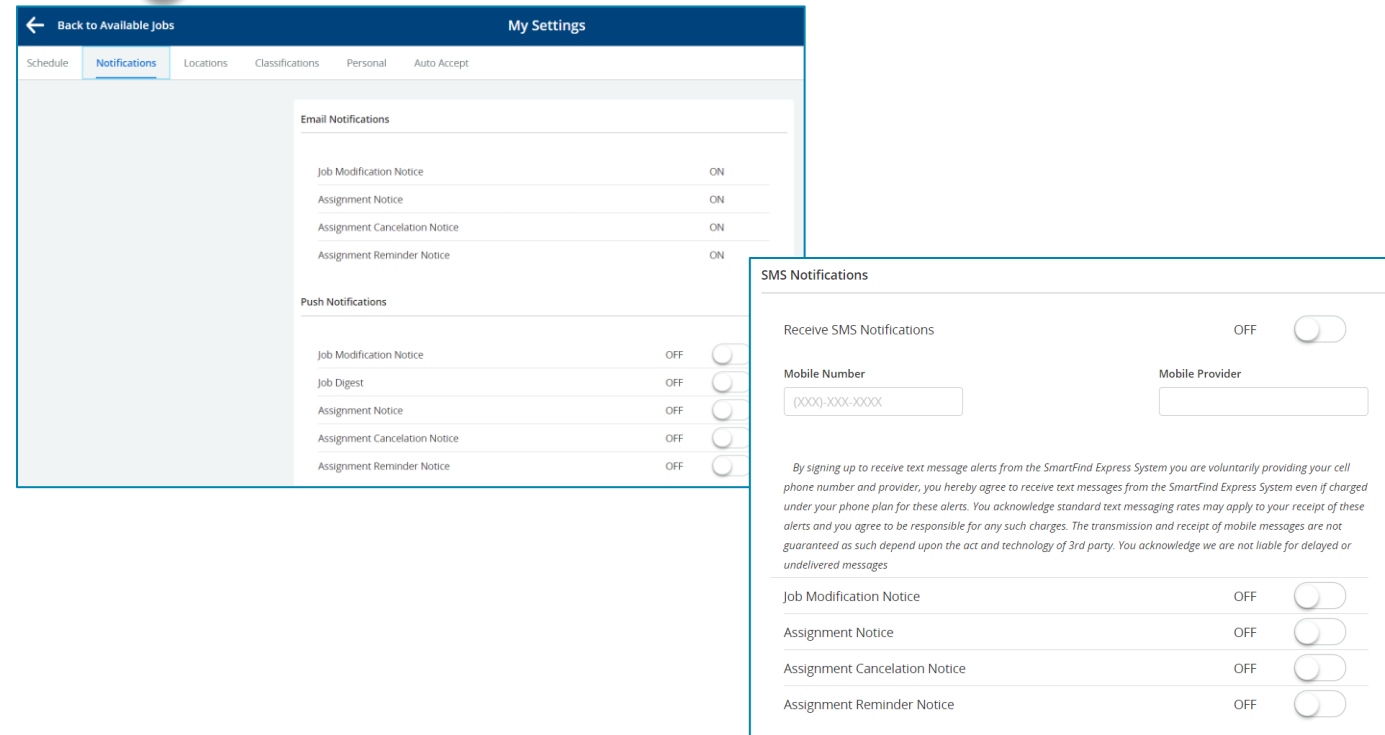


### Notifications Configuration Steps:

- 1 Select "Notifications"

Turn notifications on or off for email, push (in-app), and SMS (text) delivery.

If you elect to receive SMS notifications, enter **Mobile Number** and select **Mobile Provider**.

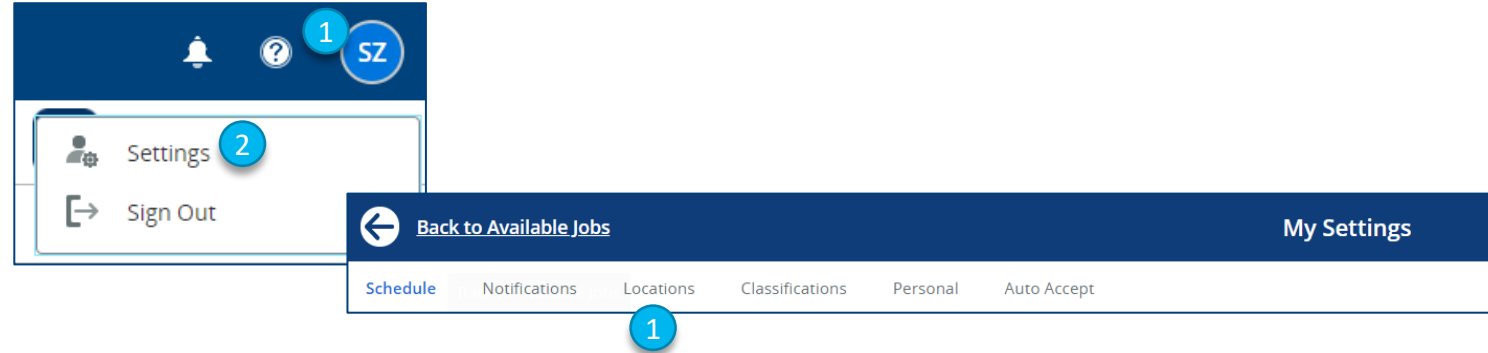


# New Substitute Experience User Guide

## How do I manage Profile Settings? Cont'd

### Navigation Steps:

- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"



### Locations Configuration Steps:

- 1 Select "Locations"

Click **Add** for **My Locations** or **My Groups**.  
Select appropriate locations and location groups.  
Click **Apply**.

My Locations		<a href="#">Add</a>
Locations	Code	
Alabama	4444	

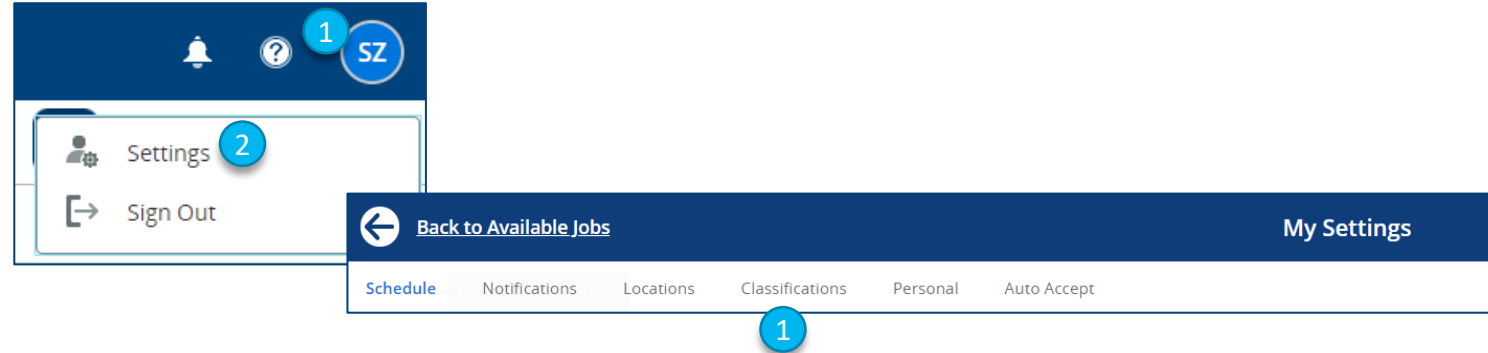
My Groups		<a href="#">Add</a>
Location Group	Code	
All Locations	0	
Australia	2290	
US Group-03	US-03	
USgroup-01	USgroup-01	

# New Substitute Experience User Guide

## How do I manage Profile Settings? Cont'd

### Navigation Steps:

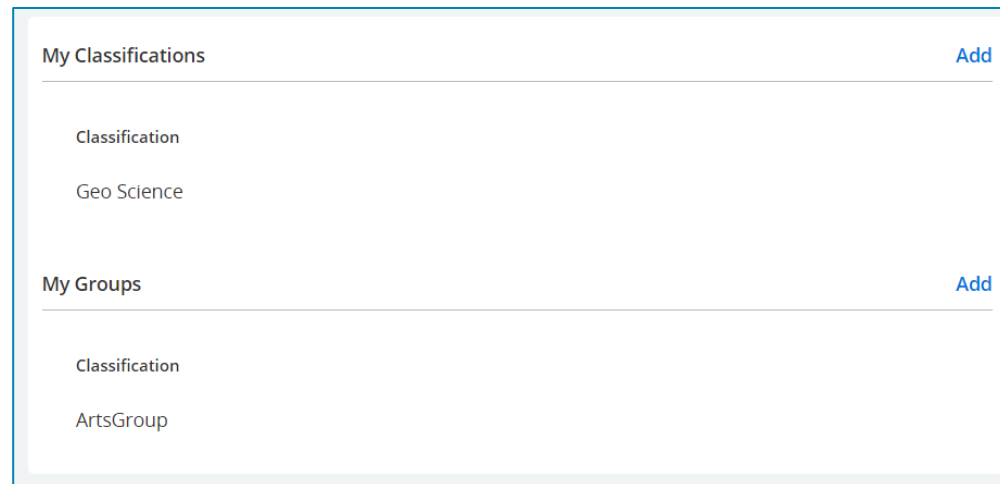
- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"



### Classifications Configuration Steps:

- 1 Select "Classifications"

Click **Add** for **My Classifications** or **My Groups**.  
Select appropriate classifications and classification groups.  
Click **Apply**.

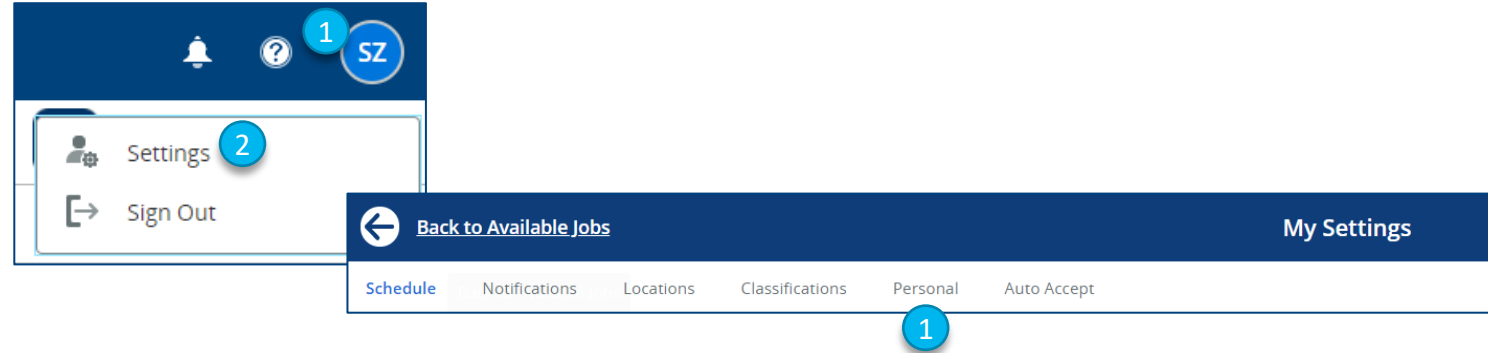


# New Substitute Experience User Guide

## How do I manage Profile Settings? Cont'd

### Navigation Steps:

- 1 Select your initials on the top right of the screen.
- 2 Select "Settings"



### Personal Configuration Steps:

- 1 Select "Personal"
- Update your email address, password, PIN, contact information (for calls), or physical address.

A screenshot of the 'Personal Information' configuration page. It contains several input fields and sections:

- Name:** amanda
- Email:** j@test.com (Not Verified) with an 'Edit Email' link.
- Password:** masked with dots, with an 'Edit Password' link.
- PIN (Phone Password):** masked with dots, with an 'Edit PIN' link.
- Address:** empty input field.
- Contact Information:**
  - Call Back Number:** (916) 461-9000 (Verified)
  - Do Not Call Until:** hh:mm am

At the bottom, there is a 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."

A screenshot of the 'Certifications' and 'Identity Providers' section. It includes a checkbox for 'Block phone calls from SmartFind Express' and a table for 'Certifications' with columns for Name, Code, Date, and Comments. The table is currently empty, showing a 'No Data Available' message. Below the table is the 'Identity Providers' section, which includes a Microsoft logo and an 'UNLINKED' toggle switch.

# New Substitute Experience User Guide

## FAQs

### **How do you cancel a job and where do those cancellations show up?**

- If your district allows, you can cancel a job from your Active job tab. Those cancelled jobs would show up in your Canceled job tab.

### **Are your accepted jobs posted on the calendar?**

- Yes! All accepted, or Active, jobs are posted on the calendar.

### **Is this new experience mobile friendly?**

- Yes! If your district allows, you can use SFE from your mobile device browser.

### **How does the new system work if jobs are specifically called in for a particular substitute?**

- If you were requested for a job, a bold green “\*Requested” would show up on the job, like to the right:

### **How do I change my locations and classifications?**

- If your district allows, you can select your initials on the top right of the screen, navigate to Settings, and select Locations or Classifications. You can then change your locations or classifications!