## WEB BROWSER ACCESS INSTRUCTIONS

### SIGN IN

Open your browser and access the SmartFind*Express* Sign In page. Review the messages above the Sign In. Enter your Access ID and PIN. Review additional announcements on your home page, if any.

### PIN REMINDER

The "Forgot your PIN?" link supports users who want to log into the system, but have forgotten their PIN. When this link is selected, the system displays the PIN Reminder Request page. The user's Access ID and the security code being displayed must be entered on this page. **Note:** *You must be registered with the system to use this option.*

*If the submitted information is valid*, the system sends the user an email containing their PIN. This information will enable the user to successfully log into the system. The email is sent to the email address in the user's profile. *If the submitted information is invalid*, the system will return an error message and allow new information to be entered.

### TO CREATE AN ABSENCE

Choose the *Create an Absence* link
**Important Note:  Items in Bold are <u>required</u> to complete an Absence and receive a Job Number.**

- **Select the Location**

- **Select the Classification**
  - Choose from the drop-down menu

- **Select the Reason for this absence from the drop-down menu**

- Enter Budget Code, if applicable

- **Indicate if a substitute is required for this absence**
  - Choose Yes or No

- **Select Start and End Dates for your absence**
  - Enter the dates with forward slashes (MM/DD/YYYY) or use the calendar icon

- **Select Start and End Times for your absence.  Default times are listed**
  - To change defaults, enter time in HH:MM am or pm format
  - Ensure that the correct time is entered. If the times for the substitute are different than the absence times, please enter the adjusted times

- Multiple Day (Recurring) Absence. Select the *Modify Schedule* button.
  - Your default work schedule is shown. Remove the checkmark(s) from the Work Days boxes that do not apply to this absence
  - Modify daily schedule and/or times for absence and substitute
  - Select the *Continue* button
  - 
- Request a particular substitute
  - Enter the substitute's access ID number or use the Search feature to find the substitute by name

- Indicate if the requested substitute has accepted this job
  - Yes = substitute is prearranged and will not be called and offered the job
  - No = call will be placed and the substitute will be offered the job
- Enter special instructions for the substitute to view
- Add File Attachment(s) to the job record, if desired. Up to 3 files can be added. The attachments can be lesson plans, slides, images or other file types. Files cannot exceed the maximum per file size limit.
- **Select the Continue button**
- **Select the Create Absence button to receive a Job Number. Please record this Job Number.**

### TO REVIEW/ CANCEL ABSENCE OR MODIFY SPECIAL INSTRUCTIONS

Choose the *Review Absences* link to review past, present and future absences or to cancel an absence.

Follow these steps
- Select the format for absence display:  List or Calendar view.
- Search for Jobs: Enter specific date range (MM/DD/YYYY) or Calendar icon, or enter job number or leave blank to return all your absences
- Select the *Search* Button
- Select the *Job Number* link to view job details on future jobs

From the Job Details screen
- Special instructions can be updated on future jobs. Modify the special instructions and select the *Save* button
- To cancel your job, select the *Cancel Job* button
- If a substitute is assigned to your absence and you want the system to notify them of the job cancellation (by calling them), place a checkmark in the box prior to the question "Notify the Substitute of Cancellation?"
- Select *Return to List* button to return to the job listing

### SIGN OUT AND WEB BROWSER INFORMATION

At any time during the session, the *Sign Out* link can be selected to end the session and disconnect from SmartFind*Express*. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFind*Express*.

To ensure security and privacy of information, use the *Sign Out* link to disconnect from SmartFind*Express,* and close the web browser when you finish with your session.

**Important Note**: *Do NOT use the browser's BACK button to navigate to screens. Navigation buttons are on the bottom of* SmartFind*Express screens, such as the Return to List and Continue buttons.*

## Caldwell County Schools
## SmartFind Express
## Employee Quick Reference Card

**System Phone Number**        <u>1-866-691-9522</u>

**Help Desk Phone Number**        <u>(828) 728-8407 Ext. 152</u>

**Write your PIN number here**        _____

**Web Browser URL**        **caldwell.eschoolsolutions.com**

### THE SYSTEM CALLS SUBSTITUTES DURING THESE TIMES:

|  | **Today's Jobs** | **Future Jobs** |
|---|---|---|
| Weekdays | Starts at 6:00 am and continues until 50 % of completion of job | 6:00 - 10:00 pm |
| Saturday | None | None |
| Sunday | None | 6:00 - 10:00 pm |
| Holidays | None | 6:00 - 10:00 pm |

### REASONS FOR ABSENCE:
1. **Sick Leave**
3. **Extended Sick Leave**
4. **Absence with out deduction**
6. **Personal Leave**
7. **Absence with out pay**
20. **Annual Leave**
99. **Professional Leave**

### TELEPHONE ACCESS INSTRUCTIONS

1. Enter your **Access ID** followed by the star (*) key
2. Enter your **PIN** followed by the star (*) key

(If you do not have a PIN, enter your Access ID again, when prompted for your PIN. You will then be able to enter a new PIN to use.)

### REGISTRATION

1. Record your name followed by the star (*) key
   **PRESS 1** to Accept
   **PRESS 2** to Re-enter
   **PRESS 9** to Exit and hang-up

2. Hear your work locations and job descriptions. If they are not accurate, contact the help desk.

3. If your PIN is the same as your Access ID, enter a new PIN
   Enter a PIN at least six (6) digits in length followed by the star (*) key
   **PRESS 1** if Correct
   **PRESS 8** to Re-enter
   **PRESS 9** to Exit and hang-up

### MENU OPTIONS
**1 – Create an Absence**
**2 – Review, Cancel Absence or Modify Special Instructions**
**3 – Review Work Locations and Job Descriptions**
**4 – Change PIN, Re-record Name**
**9 – Exit and hang-up**

### WORK AT MULTIPLE LOCATIONS?

If you **pressed 1** to Create an absence

1. Enter the location code followed by the star (*) key or wait to hear a list of locations

2. **PRESS 1** to Accept location choice
   **PRESS 2** to Re-enter
   **PRESS 9** to Exit to menu options

### 1- TO CREATE AN ABSENCE

1. Enter dates for the absence
   **PRESS 1** if the Absence is only for today
   **PRESS 2** if the Absence is only for tomorrow
   **PRESS 3** to Enter the dates and times for the absence
   **PRESS 9** to Exit to menu options

2. If you pressed 3 to Enter Dates and time
   Enter Start Date
   **PRESS 1** to Accept the date offered
   **PRESS 2** to Enter start date
   Enter two digits for the month and two digits for the day (MMDD)
   **PRESS 9** to Exit to menu options

   For all options
   Enter Start Time
   **PRESS 1** to Accept offered time
   **PRESS 2** to Enter time
   Enter two digits for the hour and two digits for the minutes in HH:MM format. Enter 1 for am or 2 for pm
   **PRESS 9** to Exit to menu options
   Repeat procedure for end date and time

3. Enter the reason from page 1 followed by the star (*) key or wait for a list of reasons
   **PRESS 1** if Correct
   **PRESS 2** to Re-enter
   **PRESS 9** to Exit to menu options

4. Record Special Instructions
   **PRESS 1** to Record special instructions. Press the star (*) key when done
   **PRESS 2** to Bypass this step

5. Is a Substitute Required?
   **PRESS 1** if a substitute is required
   **PRESS 2** if a substitute is not required
   **PRESS 9** to Exit to menu options

6. If you **pressed 1**, a substitute is required
   **PRESS 1** to Request a particular substitute
   Enter the substitute access ID, followed by the star (*) key
   **PRESS 1** to Accept requested substitute
   **PRESS 1** if the Substitute should be called
   **PRESS 2** if the Substitute has already agreed to work and does not need to be called
   **PRESS 9** to Exit to menu options
   **PRESS 2** to Re-enter
   **PRESS 2** to Bypass requesting a substitute

7. Complete Absence
   **PRESS 1** to Receive the job number
   **Record the Job Number. The Job Number is your confirmation.**
   **PRESS 1** to Hear the job number again
   **PRESS 9** to Exit to menu options
   **PRESS 2** to Review absence information

### 2 - TO REVIEW/CANCEL ABSENCE OR MODIFY SPECIAL INSTRUCTIONS

1. Hear the job information
   **PRESS 1** to Hear absence information again
   **PRESS 2** to Modify special instructions

   **PRESS 3** to Cancel the absence
   **PRESS 8** to Hear the next absence
   **PRESS 9** to Exit to menu options

2. If you **pressed 2** to Modify special instructions
   **PRESS 1** to Delete
   **PRESS 2** to Re-enter
   Record instructions. Press the star (*) key when done
   Hear the new instructions
   **PRESS 1** if Correct
   **PRESS 2** to Re-enter
   **PRESS 9** to Exit
   **PRESS 9** to Exit and hear next absence

3. If you **pressed 3** to Cancel the job
   **PRESS 1** to Confirm the cancellation request
   If a substitute is assigned to the absence
   **PRESS 1** for the System to call the assigned substitute
   **PRESS 2** to Not have the system call the substitute
   **PRESS 9** to Exit and hear next absence
   **PRESS 9** to Exit and hear next absence (without canceling)
   Once you confirm a request to cancel the job, you **MUST** wait for the system to say *"Job Number has been cancelled."*

### 3 - TO REVIEW WORK LOCATIONS AND JOB DESCRIPTIONS

1. Hear a list of your work locations and job descriptions

### 4 - TO CHANGE PIN, RE-RECORD NAME

1. **PRESS 1** to Change your PIN
   **PRESS 2** to Change the recording of your name
   **PRESS 9** to Exit to menu options

2. If you **pressed 1** to Change your PIN
   Enter a new PIN at least six (6) digits in length, followed by the star (*) key
   **PRESS 1** if Correct
   **PRESS 8** to Re-enter
   **PRESS 9** to Exit to menu options

3. If you **pressed 2** to Change the recording of your name
   Record your name. Press the star key (*) when done
   **PRESS 1** to Accept
   **PRESS 2** to Re-record name
   **PRESS 9** to Exit to menu options