



SCHOOL DISTRICT NO. 8 (Kootenay Lake)

SmartFindExpress

CUPE - Employee Quick Reference Card

System Phone #1-844-802-5286

SFE Operator – Danielle Monk tabsence@sd8.bc.ca / Phone #1-250-505-7065

Write your Access ID here _____ (employee number)

Write your PIN here _____ (e-serve number)

Web Browser URL kootenay.eschoolsolutions.com

*link can be accessed directly via the bottom of SD8 website www.sd8.bc.ca

TELEPHONE ACCESS INSTRUCTIONS

MANUAL CALL OUT FOR SUBSTITUTES DURING THESE TIMES:

	Today's & Future Jobs
Weekdays	Starts at 6:00 am Custodians: 9:00 am

REASONS FOR ABSENCE:

Code	Name
10	Sick - CUPE
11	Family Illness - CUPE - 3 days/yr - specify relationship
12	Medical/Dental - CUPE
13	Vacation - CUPE
14	Banked Time - CUPE
15	Leave Without Pay - CUPE
16	Bereavement - CUPE - specify relationship
17	Funeral - CUPE - specify relationship
18	IEP Meeting - CUPE
19	Jury/Court Duty - CUPE
20	School Based Cost - CUPE
21	Board Paid - CUPE Union Business Leave
22	Union Paid - CUPE Union Business Leave
23	Short Term - CUPE Union Business Leave
24	Board Committee - CUPE Union Business Leave
25	Miscellaneous Paid Leave - CUPE
26	Pro-D - CUPE
27	Other Leave - please specify & provide budget code - CUPE
28	Third Party Billing - CUPE
29	Aboriginal Education - CUPE
30	Extra Staff - CUPE
301	Unfilled Position - CUPE
31	To Other Position - CUPE
311	Bus Trip
312	JSAC - Safety Committee - CUPE

Before any features are available, you must register with the system and create a PIN. The Access ID (Employee #) and PIN (E-Serve #) are used for all interactions with the system.

REGISTRATION

1. Enter your **Access ID** followed by the star (*) key.
2. Enter your **PIN ID** followed by the star (*) key.
3. Record your name followed by the star (*) key.
4. Hear your work schedule. If this information is incorrect, complete the registration and then contact your Help Desk to correct. **PLEASE DO NOT CHANGE YOUR PIN/PASSWORD.**

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN

Open your browser and access the SmartFindExpress Sign In page. Enter your Access ID and PIN and CAPTCHA shown (not case sensitive and no spaces required - tip – click the refresh button to the right of the captcha and then only type the 1st word or # and enter).

PIN REMINDER

The “Trouble Signing In” 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 and have a valid email address in your profile to use this option.*

PROFILE

Information

- Review profile status and address information.

SELECT ROLE

- For multi-role employees i.e. employee & substitute, click on the desired icon to access another profile. No need to log out of the system and back in again!

TO CREATE AN ABSENCE

Choose the *Create an Absence* link

Important Note: *Items in Bold are required to complete an Absence.*

- **Select the Location**
- **Select the Classification**
 - Choose from the drop-down menu
- **Select the Reason for this absence from the drop-down menu.**

NOTE: *If you select a reason that requires administrator approval, the system displays a notification that the selected reason requires approval. You can continue with the job create with this reason or choose another reason. You can also provide an Approval Comment. If details are requested, please provide them in the approval comment. If details are not provided, leave approval may be denied.*
- **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**
 - **NOTE:** *if you require a substitute for only part of your leave (ie 3 day leave, but substitute only required for 1 day), you must put in 2 separate leave requests*
 - 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

- **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 instruction document, slides, images or other file types. Files cannot exceed the maximum per file size limit.
- **Select the Continue button**

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

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

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 (Job can not be cancelled less than 24 hours prior to start)
- If a substitute is assigned to your absence, you will 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 SmartFindExpress. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFindExpress.

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

You can click the [Help link](#) to access Help Guides and How-to videos (please do not change your PIN #).

Important Note:

Do NOT use the browser's BACK button to navigate to screens. Navigation buttons are on the bottom of SmartFindExpress screens, such as the Return to List and Continue buttons.

TELEPHONE ACCESS INSTRUCTIONS

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

MENU OPTIONS

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

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
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 (MMDD)
3. Enter the number for the Absence reason from the list on the front page of this booklet, followed by the star (*) key, or wait to listen for a list of reasons
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
6. Complete Absence
PRESS 1 to Receive the job number
Record the Job Number. The Job Number is your confirmation.

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 (Job can not be cancelled less than 24 hours prior to start)

2. 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
Once you confirm a request to cancel the job, you **MUST** wait for the system to say "**Job Number has been cancelled.**"

TO RE-RECORD NAME

1. **PRESS 2** to Change the recording of your name
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October, 2017