SCHOOL DISTRICT NO. 8 (Kootenay Lake)
SmartFindExpress
CUPE - Employee Quick Reference Card

System Phone Number 1-844-802-5286

Help Desk Ph. Number (Operator–Kristen Skriver) 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 right hand side under staff tab 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 6:15 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 **Access ID** again 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.
5. When asked to update your **PIN #** please set it to your five-digit e-Serve number. Do not change this again.

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN
Open your browser and access the SmartFind*Express* Sign In page. Click the SD8/Microsoft Sign In button. Sign in using your SD8 email and password.
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 <u>required</u> 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.* <u>If details are requested, please provide them in the approval comment. If details are not provided, leave approval may be denied.</u>
- **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**
  - <u>**NOTE:**</u> 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. For non-consecutive days, 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 <u>cannot</u> 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

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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.

You can click the Help link to access Help Guides and How-to videos (please do not change your PIN # after the initial registration process).

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.

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 <u>cannot</u> 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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