

SCHOOL DISTRICT NO. 8 (Kootenay Lake)
SmartFindExpress (SFE) – CUPE Substitute Reference Guide

System Phone Number: **1-844-802-5286**

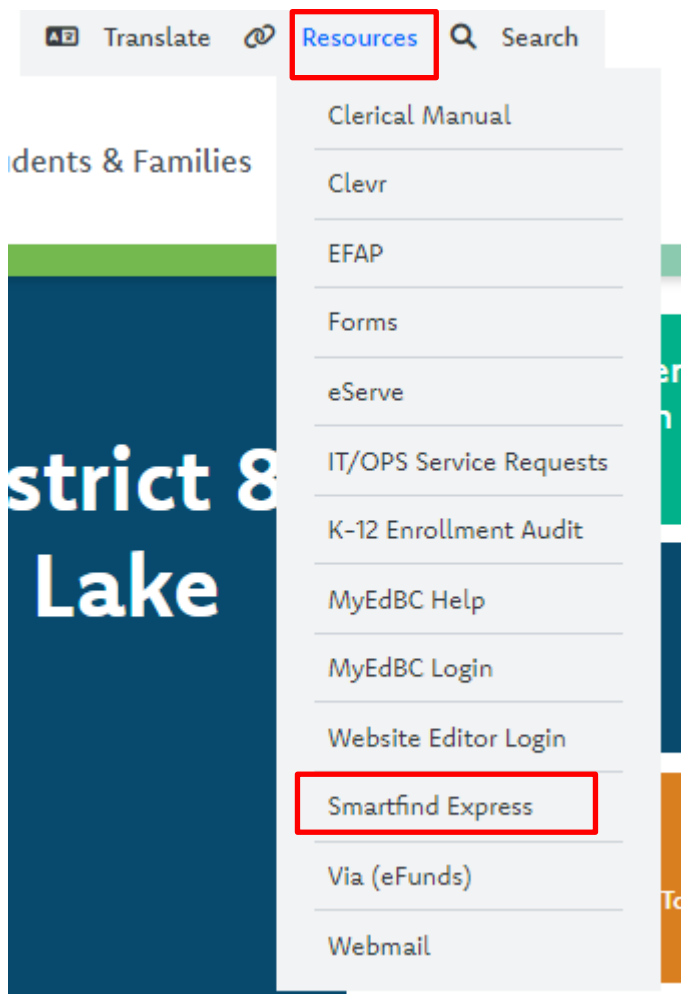
SFE Help Desk Operator: **250-505-7065** tabsence@sd8.bc.ca

Write your Access ID here _____ (Employee number)

Write your PIN here _____ (E-serve number)

Web Browser URL kootenay.eschoolsolutions.com

****The link to SFE can be accessed via the RESOURCES dropdown menu located at the top right of the SD8 website www.sd8.bc.ca****



REGISTRATION

1. Call the SFE System phone # at 1-844-802-5286
2. Enter your **Access ID** followed by the star (*) key.
3. Enter your **ACCESS ID** again followed by the star (*) key.
4. Listen and verify your personal information.
5. Enter your **PIN ID** followed by the star (*) key. **PLEASE DO NOT CHANGE YOUR PIN/PASSWORD.**

THE SYSTEM CALLS OUT FOR SUBSTITUTES DURING THESE TIMES:

	Today's Jobs	Future Jobs
Weekdays	6:00 am- 9:00 am	6:00 am- 9:00 am
Saturday	None	
Sunday	None	
Holidays	None	

DECLINE/ CANCEL REASONS:

Code	Name
1	Illness
10	ESA Paid Sick Leave
2	Vacation
3	Already Working
4	Medical/Dental
5	Home Childcare
6	Bereavement
7	Classification doesn't match
8	Scheduling Challenge
9	Transportation

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

WEB BROWSER ACCESS

SIGN IN

- Open your browser and access the SmartFindExpress Sign In page. Click the SD8/Microsoft sign in button and sign in using your SD8 email and password.



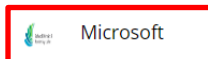
District Username

Password

Submit

[Forgot Password?](#)

OR, SIGN IN WITH

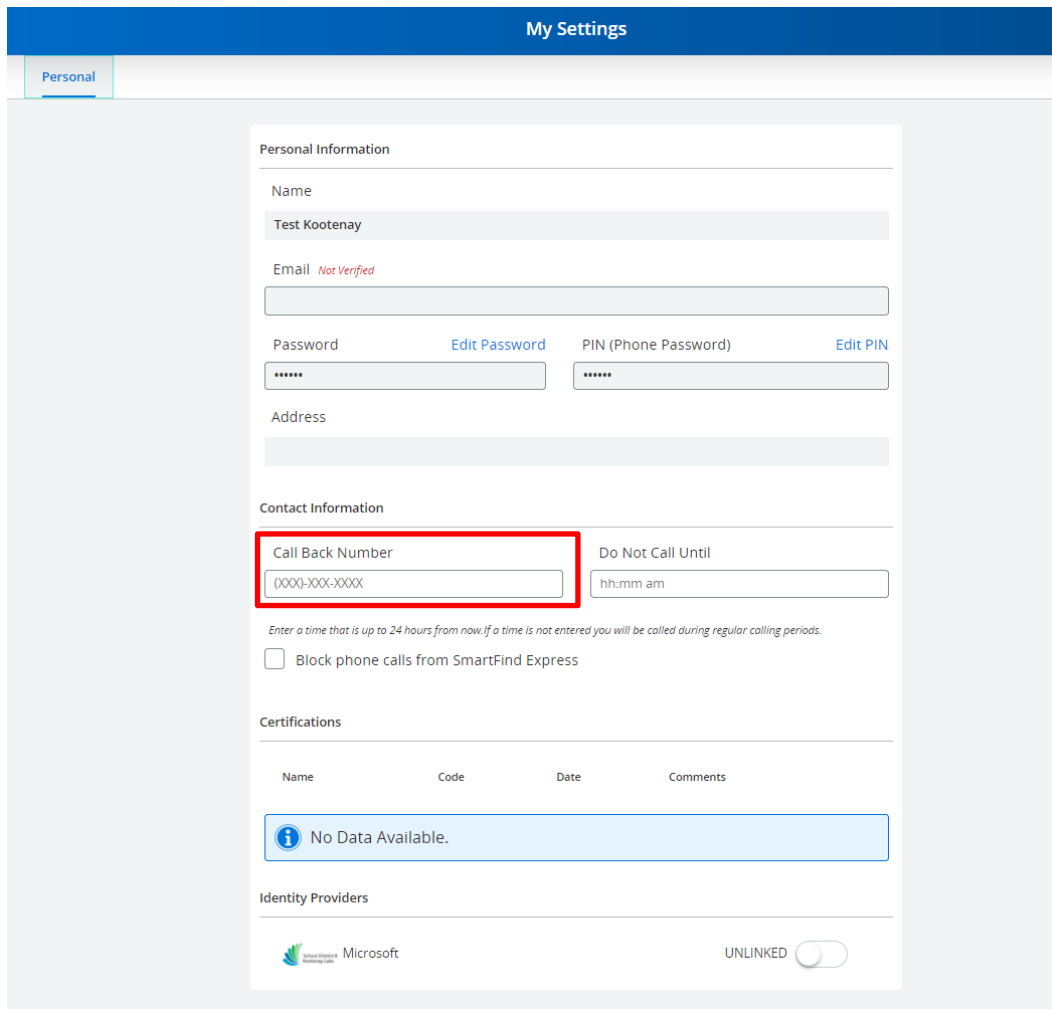
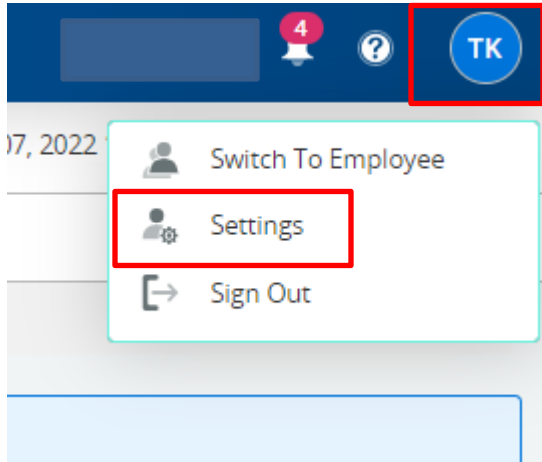


****Note: To sign in using the Microsoft sign in, you must first register using the Smartfind Express phone number provided ****

SUBSTITUTE PROFILE

Personal Information

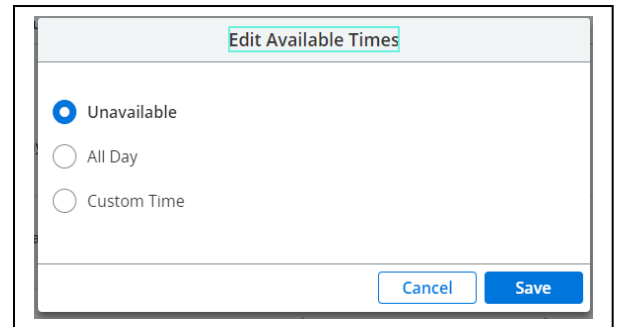
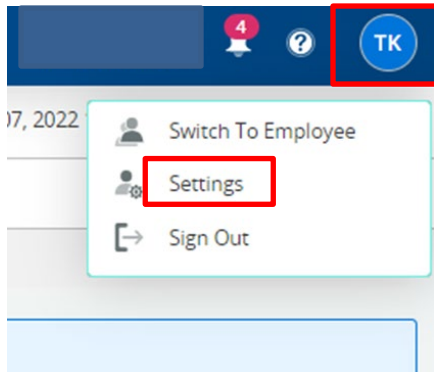
- Review profile status and address information by navigating to the profile icon at the top right of your SFE homepage and select settings from the dropdown menu. Navigate to the Personal section on the tool bar to ensure all information is accurate. Please notify the SFE operator at tabsence@sd8.bc.ca if you require any information to be updated.

A screenshot of the 'My Settings' page. The page has a blue header with the title 'My Settings'. Below the header, there is a tab labeled 'Personal'. The main content area is titled 'Personal Information' and contains several input fields: 'Name' (with the value 'Test Kootenay'), 'Email' (with a red 'Not Verified' status), 'Password' (with an 'Edit Password' link), 'PIN (Phone Password)' (with an 'Edit PIN' link), and 'Address'. Below these is the 'Contact Information' section, which includes a 'Call Back Number' field (highlighted with a red box) with a placeholder '(XXX)-XXX-XXXX', a 'Do Not Call Until' field with a placeholder 'hh:mm am', and a checkbox for 'Block phone calls from SmartFind Express'. The 'Certifications' section is empty, showing a table with columns for Name, Code, Date, and Comments, and a message 'No Data Available.' The 'Identity Providers' section shows a 'Microsoft' provider with an 'UNLINKED' toggle switch.















SCHEDULE

General

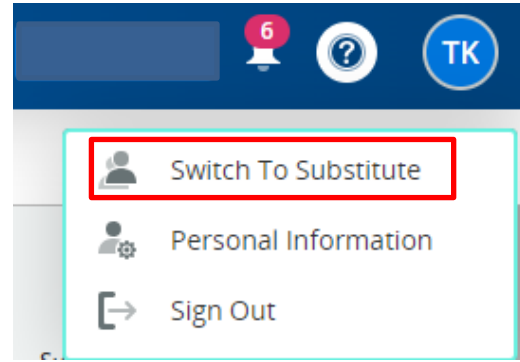
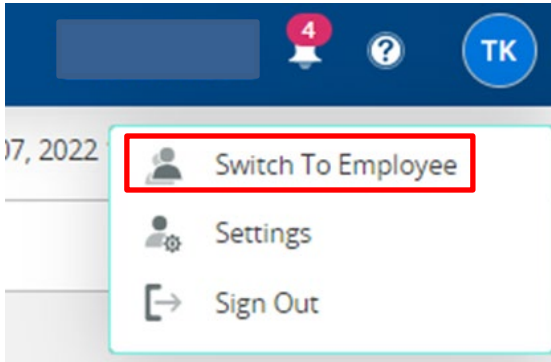
- **Modify Availability: It is the responsibility of the substitute to adjust their availability.**
- Navigate to the profile icon in the top right corner of your SFE homepage and select settings from the dropdown menu. This will automatically open to your weekly schedule, select the pencil (edit) button to edit your availability.



My Schedule

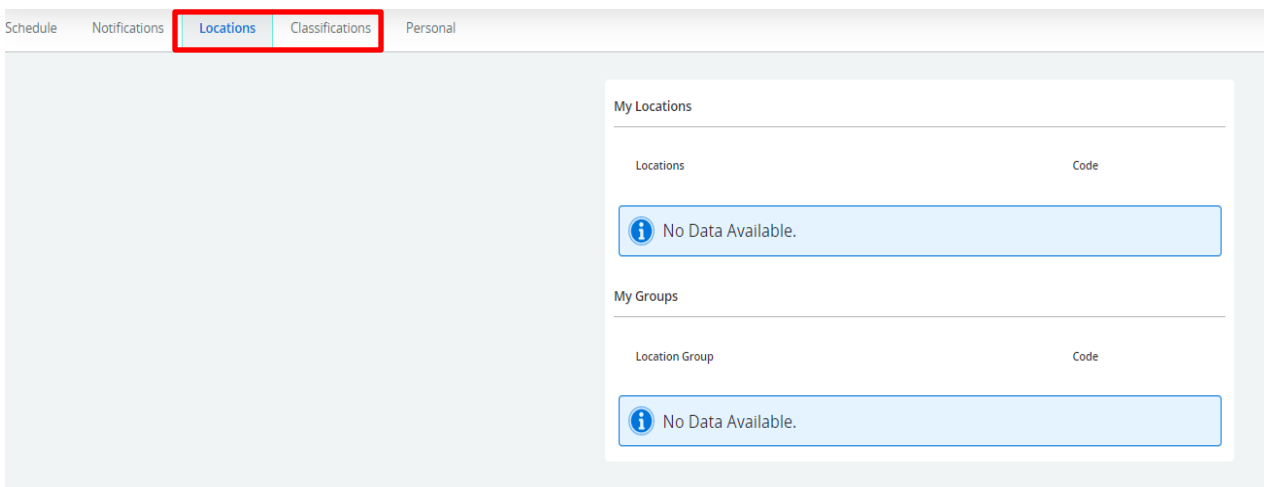
Days	Available Times		Do Not Call Times	
Sunday	Unavailable		None	
Monday	Unavailable		None	
Tuesday	All Day		None	
Wednesday	All Day		None	
Thursday	All Day		None	
Friday	Unavailable		None	
Saturday	Unavailable		None	

- **FOR MULTI-ROLE EMPLOYEES (THOSE THAT HOLD A TEMPORARY OR REGULAR POSITION AND ARE ALSO ACTIVE ON CALL) CLICK ON THE DESIRED ROLE TO ACCESS THE EACH PROFILE.**



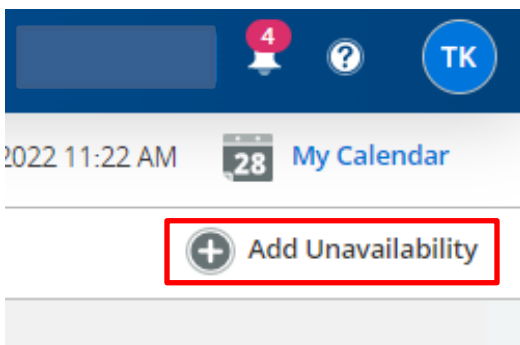
CLASSIFICATIONS AND LOCATIONS

- Review classifications and the locations you have chosen for assignments.
- Notify the SFE operator of any discrepancies or changes that are required.



UNAVAILABLE DATES

- Include unavailable dates by selecting the add unavailability button.



- Enter Start and End date range (mm/dd/yyyy) or use the calendar.
- Select the ALL DAY or CUSTOM TIME to enter the time/duration.

- Select CONTINUE RECEIVING CALLS DURING PERIODS OF UNAVAILABILITY, if during the unavailable time entered you would still like to receive calls. Leave the box unchecked if you do not want to receive any calls during this time.
- Select the SAVE button.

Add Unavailability Date

Select Date

Start Date Required

MM/DD/YYYY

End Date Required

MM/DD/YYYY

Time/Duration

All Day (00:00am to 11.59pm)

Custom Time

Future Calls

Continue receiving calls during periods of unavailability

ACCEPTING JOBS VIA THE TELEPHONE

- Enter ACCESS ID (Employee #) followed by the star (*) key.
- Enter Pin # followed by the star (*) key.
- PRESS 1 to Hear the job offer
- PRESS 2 to Set temporary Do Not Call
- If you pressed 1 to Hear the job offer:
 - PRESS 1 to Hear the job description
PRESS 2 to Decline the job (without hearing the description)
 - Enter the decline reason from page 1 followed by the star (*) key

Code ↕	Name ↕
1	Illness
10	ESA Paid Sick Leave
2	Vacation
3	Already Working
4	Medical/Dental
5	Home Childcare
6	Bereavement
7	Classification doesn't match
8	Scheduling Challenge
9	Transportation

- If you pressed 1 to Hear the job description:
 - PRESS 1 to Accept this job
 - Record the Job Number. You are successfully assigned to the job.
- PRESS 2 to Repeat the job description
- PRESS 3 to Decline the job
 - Enter the decline reason from page 1 followed by the star (*) key
 - PRESS 1 to Accept
- If you pressed 2 to Set temporary Do Not Call, hear a time offered:
 - PRESS 1 to Accept the time offered
 - PRESS 2 to Enter an earlier time in HH:MM format.

Tips for using SmartFindExpress IVR (Interactive Voice Response) system:

- **To initiate interaction, say “hello” when the system calls.** The system listens to the cadence of the substitute’s voice to determine if the substitute is on the other side.
- **Respond accurately with keypad choices. E.g. Use the * key not the # key.**
- **Respond within the allotted time.** If a keypad response is not received within the allotted # of seconds, the message “timed out waiting on user input” will be heard.
- **When a phone key is pressed while the SmartFind system is talking, it will stop the message to listen for an expected response.** If the system message continues to play while phone keys are being pressed, the system is not hearing the dial tones.
- **When answering a call and logging into the system keep your phone in normal handset mode and not speaker phone mode.** Speakerphone can cause echo and some phones may not send DTMF correctly when in speakerphone mode. Cell phones are full duplex but may switch to half duplex when you're on speakerphone.

Since SmartFind is on the receiving side of the touch tones being pressed and the tones are managed and controlled by the phone service provider, the issue is to be reported to the phone service provider of the substitute. Once the Substitute’s phone service provider is notified they will begin to be aware of the issue and start toward the resolution as it cannot be resolved through the SmartFind Express application since the issue exists on the phone carrier’s network.

- **TIMED OUT WAITING ON USER INPUT**
The "Timed out waiting on user input" message indicates that SmartFind Express did not receive any digits from the user. When the system hears the first digit that the user presses it will stop talking allowing the user to finish entering digits.

If the user enters digits and the system does NOT stop talking as they are pressing the keys on their phone, we do not "hear" the touch tones (DTMF) over the audio of the call and the user will receive the message "Timed Out Waiting on User Input."

ACKNOWLEDGING A CANCELLED JOB VIA THE TELEPHONE

When a job is cancelled, the system may call to notify you of the cancellation.

- **Enter ACCESS ID (Employee #) followed by the star (*) key.**
- **Enter Pin # followed by the star (*) key.**
- Press 1 to accept the cancellation

CALLING THE SYSTEM

System Phone Number: **1-844-802-5286**

- Enter ACCESS ID (Employee #) followed by the star (*) key.
- Enter Pin # followed by the star (*) key.

MENU OPTIONS

- 1 - Review or Cancel Assignments
 - Hear assignments in chronological order
 - PRESS 1 to Hear assigned job information again
 - PRESS 2 to Cancel this assigned job
 - If you pressed 2 to Cancel assignment
 - PRESS 1 to Confirm cancellation (Enter cancellation reason followed by the * key)
- 2 – Hear Available Jobs
 - Hear assignment information
 - PRESS 1 to Repeat assignment
 - PRESS 2 to Accept assignment
 - PRESS 3 to Decline assignment
 - If you pressed 3 to Decline assignment
 - Enter decline reason from page 1 followed by the star (*) key
- 3 - Change your Callback Number
- 4 - Review or Modify Temporary Do Not Call Time
- 5 - Review or Modify Unavailability Dates
- 6 - Review or Modify Daily Availability
- 7 - Change PIN or Re-record Name
- 9 - Exit and hang-up

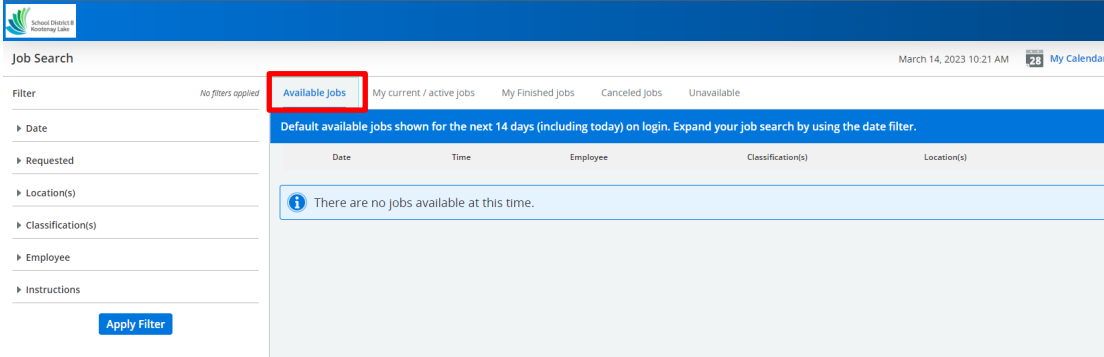
ACCEPTING AVAILABLE JOBS VIA THE WEB

To view and accept jobs:

- You must be available to work all days and times of the job
- You have specified that you will work at the specified location

Follow these steps:

- From the Available Jobs tab, view a summary of all jobs matching your qualifications and preferences.

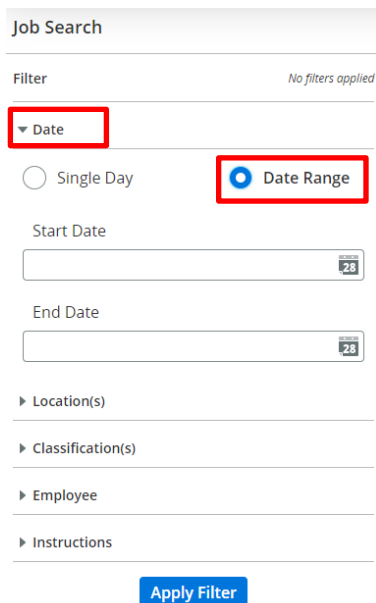


- To view the job schedule and details, expand the row
- To take a job assignment, click Accept.
- OR -
- To hide a job from the list, click Decline. Select a Reason for Declining, then click Confirm.

Caution: If the system determines that a substitute is in the process of accepting the job via telephone, the job will not be assigned. If the job assignment is successful, a job number is provided.

Tip: Occasionally refresh your search results. The list of available jobs can change as other substitutes accept assignments and jobs are added.


- To search jobs:
 - Expand the date filter option and select date range
 - Enter the start and end dates with forward slashes (MM/DD/YYYY) or use the calendar icon.



- Press the *Apply Filter* button to display the list of jobs.
- Press the *Details* link to view the job details. Review the specifics and choose one of the following
 - Select the *Accept Job* button. A job number will be assigned to you if the job has been successfully assigned to you. **Please record this Job Number.**
 - Select the *Decline Job* button. Select a reason for decline from the drop-down list, then select the *Decline Job* button
 - Select the *Return to List* button to return to the job listing

REVIEW ASSIGNMENTS



Available Jobs **My current / active jobs** My Finished jobs Canceled Jobs Unavailable

Job ID	Date	Time	Employee	Classification(s)	Location(s)
 You have no active or upcoming jobs.					

Select from the following options:

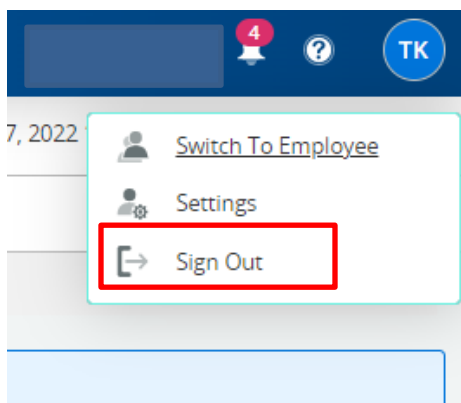
- Current/Active Jobs, Finished Jobs or Canceled Jobs
- Select the arrow beside the job number to expand into job details
- Select the *Cancel Assignment* button to cancel your assignment. Enter a reason for canceling from the pull down list. Wait for the “Job was cancelled successfully” notification. You cannot cancel an assignment within 1 hour of the start time.
- An assignment may contain file attachments. To view or download a file attachment, click on the instructions icon from the job details.

Available Jobs My current / active jobs **My Finished jobs** Canceled Jobs Unavailable

Job ID	Date	Time	Employee	Classification(s)	Location(s)
▼ 124825	Thursday 01/26/2023	08:30 AM 02:30 PM	Christine Brady	Kindergarten	Hume Elementary - Teachers/Excluded
Status Finished	Weekly Schedule Thursday		01/26/2023 08:30 AM - 02:30 PM	Address & Phone 	Instructions 

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.



The screenshot shows a user interface with a dark blue header containing a notification bell with '4', a help icon, and a 'TK' button. Below the header, a date '7, 2022' is visible. A dropdown menu is open, showing three options: 'Switch To Employee' (with a person icon), 'Settings' (with a gear icon), and 'Sign Out' (with a right-pointing arrow icon). The 'Sign Out' option is highlighted with a red box.

- 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.