

DISTRICT NAME

Employee Quick Reference Card

System Phone Number _____

Help Desk Phone Number _____

Write your Password here _____

Write your Access ID here _____

Write your PIN here _____

Web Browser URL _____

TELEPHONE ACCESS INSTRUCTIONS

THE SYSTEM CALLS SUBSTITUTES DURING THESE TIMES:

	Today's Jobs	Future Jobs
Weekdays	Starts at 5:00 am	4:00 - 9:00 pm
Saturday	None	None
Sunday	None	4:00 - 9:00 pm
Holidays	None	4:00 - 9:00 pm

REASONS FOR ABSENCE:

1. Sick Leave
2. Personal Leave
3. Professional Development
4. FMLA
5. Military Leave
6. Jury Duty

Before any features are available, you must register with the system and create a PIN. The Access ID and PIN 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 when it asks for your PIN 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. You will be asked to select a new PIN. Enter a PIN at least six (6) digits in length followed by the star (*) key.

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 – Change PIN, 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 reason from page 1 followed by the star (*) key or wait 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. 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 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.

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

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 CHANGE PIN or RE-RECORD NAME

1. **PRESS 1** to Change your PIN
PRESS 2 to Change the recording of your name

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN

Open your browser XXXXX.sfe.powerschool.com and access the SmartFindExpress Sign In page. Enter your Access ID and PIN. You will be prompted to create a new password. Follow the New Password Requirements to create a password. After login using Access ID / Password you will be prompted to validate your email address and callback number.

FORGOT PASSWORD

The "Forgot Password?" link supports users who want to log into the system but have forgotten their Password. When this link is selected, the system displays the Password Reminder Request page. The user's Access ID must be entered on this page. Instructions will be sent to the email address on your profile.

Note: You must be registered with the system to use this option

MANAGE PROFILE SETTING - Update your contact and account information.

1. Select Profile Icon > Personal Information.
2. Update your email address, password, PIN, contact information (for calls), or physical address.

SELECT ROLE

- For multi-role employees, click on the **Profile Icon** to access another profile. No need to log out of the system and back in again!

TO CREATE AN ABSENCE

1. Click **Create Absence**.



Note: The **Absences** page is the home page. If you are using another feature in the software, choose **Absences** to navigate to this page.

2. Choose an **Absence Reason** and, if needed, enter an **Approval Comment**.
3. Complete one of the following for **Repeats**:
 - Select **Does Not Repeat: For individual dates selection** to create a one-time absence request. Select the days on the calendar for the absence.
 - Select options for daily, weekly, or monthly to create a recurring absence request. Complete the fields as necessary to define the absence days for the recurring absence.
4. Click **Next**.
5. Choose a **Schedule** option.



Tip:

The default page is used to enter a standard absence request where each day of the absence is the same schedule. For example, if you want to create a request for three days of a half-day schedule, choose this option, then choose **Custom Day** to define your absence schedule.

Choose **Advanced Schedule** if your absence has different requirements for each day of the absence. For example, if you want to create a request for three days where only one day is a half-day, choose this option to specify your absence schedule for each day. Use this option rather than entering multiple absence requests.

6. Select **No Sub Required** or **Remote** if applicable.
7. For the **Substitute**, choose:
 - **Best Match** to have the system find the substitute.
 - **Specify** to enter a **Selected Substitute**.
8. Enter any **Class Instructions**, if desired. Click **Browse...** to attach a file.
9. Click **Submit**.

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

MANAGE ABSENCES

Using the web app, you can review all of your absences, modify special instructions and attachments for active jobs, or cancel a job (when allowed).



Note: You cannot view canceled requests.

1. You may view absences in two ways:
 - a. On the home page, select the absence you want to view.
 - b. Choose **My Calendar**, then click the absence on the calendar date.
2. Click **Edit** to make changes for a request.
3. Enter the changes, then click **Submit Changes**.
4. To cancel a request, click **Cancel Absence**, then click **Confirm Cancel**.



Note: Some districts may prevent cancel requests within a specified time of the absence start time.

MANAGE PREFERRED SUBSTITUTES

You can identify up to six preferred substitutes to receive the first opportunity to fill in for your absences.

1. Choose **Preferred Substitutes**.
2. In **Add a Substitute**, search by name or ID for the substitute, then click their name.
3. Click **Confirm**.
4. Click and move the substitutes to set your priority order.
5. To remove a substitute, click the **Trash** icon, then click **Confirm**.

VIEW REASON BALANCES



Note: This feature is for the new user interface only.

Use this page to review information for each reason:

- The balance remaining prior to approval.
- Total time allocated.
- Total time used.
- Time used.
- Remaining hours pending approval. If your district does not use absence approval, this is always zero.
- The new balance after pending approval.

The **Uses Allocation From** field lists any reasons used to fill time from a different reason. For example, if you use a reason named Sick towards a reason name Personal Time, this field would display **Sick** for **Uses Allocation From** in the **Personal Time** reason section.

To view reason balances:

1. Choose **Reason Balances**.
2. Review all reason information.

MY SCHEDULE



Note: This feature is for the new user interface only.

This page displays your weekly schedule by location.

1. Choose **My Schedule**.
2. Review your schedule.



Tip: Use the schedule to identify any mistakes so you can alert your school administrator.

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.

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.