

# SmartFinder System – Substitute Training

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## Introduction

Thank you for registering with the SmartFinder System. I truly believe this system will work well for you and help find the best possible assignments to match your abilities.

To get started, you must register with the system by calling (503) 614-1691

### **Registration**

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 and should never be used by anyone else. If you are not registered, you will not be called and offered or assigned to any jobs.

To register, follow these steps:

1. Call the main system number.
2. Enter your Access ID, followed by the star (\*) key.
3. Enter your PIN, followed by the star (\*) key.
4. If your Access ID and PIN are the same number, you will be asked to enter a new PIN before you can continue using the system. PIN numbers must meet the minimum length that has been setup in the parameters and can only contain numeric information.
5. If there has been no voice recording of your name, you are asked to record your name. Record your name and when you have finished recording, press the star (\*) key.
6. Finally, you will hear the telephone number that the system will call you. You can modify this number.

Once you have registered, the system can be accessed online and by phone at anytime by visiting <https://eschool.nwresd.org/> or by calling the SmartFinder line at (503) 614-1691.

You can also visit <http://www.nwresd.k12.or.us/administration/other/absence.html> and click on the "Substitute Training" link to view a visual walkthrough of the system, or "Substitute-User Manual" to view a detailed user guide on all options and features available with the SmartFinder System.

Please note that the online system will not fully replace morning call outs for assignments, but will help better fill assignments in advance and identify those substitutes best suited for individual assignments. The system will make calls for available positions as follows:

5:30 AM – 9:00 AM – Calls for same day assignments

4:00 PM – 9:00 PM – Calls for future day assignments

\*Information on changing these settings to match your availability are described under the section titled "Schedule"

In addition to the outbound calls, you can check the system at any time to look for future assignments and view a detailed calendar showing past assignment information.

If you ever have any problems accessing the system or questions about how to use the system, please feel free to contact me, or your district contact, at any time.

Best regards,

Scott Cummins

(503) 614-1273

[scummins@nwresd.k12.or.us](mailto:scummins@nwresd.k12.or.us)

**Profile** – This area is used to review your basic contact information as the system shows it.

Please note the following features available in this area:

- Address – If you need to make a change to your listed address, please contact your district coordinator or Scott Cummins.
- Call Back# - The default number used by the system to contact you. This can be changed by you at anytime. If you are out of town and want to get information on future jobs you can change it to a cell phone and then change it back when you return.
- Do Not Call Until – This can be used to temporarily set the system to not call you for any positions, up to a 24 hour period. If you need to set the system to Do Not Call for a longer period of time, refer to the section titled “Unavail Dates”

Substitute

Profiles | Schedule | Classifications | Unavail Dates

### Profile

Status: Active/Registered

Address: 3345 NW Glencoe Rd

HILLSBORO OR 97124

Call Back #:

Do Not Call Until:  (hh:mm am)

Note: Enter a time that is up to 24 "hours from now.  
If a time is not entered, you will be called during  
regular calling periods."

**Schedule** – This area shows your standard days and times for receiving calls and job availability. Please note the following features available in this area:

- To remove a day completely from your available schedule, check the box next to the day and click delete. \*If you are normally available on a day but need to mark a single day as unavailable, refer to the section titled “Unavail Dates”
- If you do not want to get calls on certain days or certain times, simply click new under Schedule and set the days and times you do not wish to be called. This can be used to set a morning callout time later than 5:30 AM, or in the afternoon if you have a class on Wednesday from 2:00 – 4:00

Substitute

Profiles | Schedule | Classifications | Unavail Dates

**Schedule**

New

**Schedule List**

Delete?	Day		
<input type="checkbox"/>	Monday	Available	All Day
<input type="checkbox"/>	Tuesday	Available	All Day
<input type="checkbox"/>	Wednesday	Available	All Day
<input type="checkbox"/>	Thursday	Available	All Day
<input type="checkbox"/>	Friday	Available	All Day

Delete

Substitute

Profiles | Schedule | Classifications | Unavail Dates

**Schedule**

New

**New Schedule**

\* Sun Mon Tue Wed Thu Fri Sat

\* Start Time \* End Time

All Day (hh:mm am) (hh:mm am)

Available for assignments:  Or

The system will NOT call:  Or

Save Return To List

**Schedule List**

Delete?	Day		
<input type="checkbox"/>	Monday	Available	All Day
<input type="checkbox"/>	Tuesday	Available	All Day
<input type="checkbox"/>	Wednesday	Available	All Day
<input type="checkbox"/>	Thursday	Available	All Day
<input type="checkbox"/>	Friday	Available	All Day

Delete

**Classifications** – This area shows job classifications you will receive calls for. Usually this area will not need to be changed, and can only be changed by your district administrator. Possible reasons for changes are:

- Licensed teachers who wish to accept classified positions on days when no Licensed positions are available
- If you are receiving calls for positions you are not interest in, the specific job classification can be removed from your profile

**Substitute**  
**Profiles | Schedule | Classifications | Unavail Dates**

**Classifications**

**Classification List**

<b>Code</b>	<b>Name</b>
NW-446	NW - SECRETARY
NW-CLASSIFIED	NW - Classified

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**Unavail Dates** – This are is used to set dates that you are unavailable for assignments on. This is useful if you will be out of town for a day or have an appointment. Please note the following features available in this area:

- To set a new date range as unavailable, click new and follow the calendar prompts.
- On days you are unavailable, you can set the system to notify you of future jobs by checking the appropriate box

**Substitute**

**Profiles | Schedule | Classifications | Unavail Dates**

### Unavailable Dates

**New**

#### Unavailable Date List

**Delete? Start Date End Date Start/End Time**

- 08/13/2007 08/20/2007 All Day
- 09/06/2007 09/10/2007 All Day

**Delete**

**Substitute**

**Profiles | Schedule | Classifications | Unavail Dates**

### Unavailable Dates

**New**

#### New Unavailable Date

Note: Times apply to every unavailable day in the date range.

\* Date Range: (mm/dd/yyyy) \* Time: All Day (hh:mm am)

Start:    - Or -

End:

Call for future assignments

**Save** **Return To List**

**Available Jobs** – This area is used to see upcoming jobs by date range based on your classification, location and schedule (you can leave the date range blank to see all available jobs)

**Available Jobs**

(mm/dd/yyyy) (mm/dd/yyyy)  
 \* Search From:   \* To:

Action	Start Date/Time	Location	Employee in for	Instructions
	End Date/Time	Classification	Work Days	Is Requested
<a href="#">Details</a>	09/11/2007 07:00 AM	NW - CASCADE ACADEMY	FAUST, KRISTEN	None
	09/11/2007 03:00 PM	NW - EDUCATIONAL ASSISTANT	Tue	Yes
<a href="#">Details</a>	09/20/2007 07:00 AM	NW - CASCADE ACADEMY	FAUST, KRISTEN	None
	09/20/2007 03:00 PM	NW - EDUCATIONAL ASSISTANT	Thu	Yes

- Click on the “Details” link to view more information about a specific assignment

**Available Jobs Detail**

Job Status: Open/Open  
 Employee in for: FAUST, KRISTEN  
 Location: NW - CASCADE ACADEMY  
 Address: 14255 SW Brigadoon Ct  
 Beaverton, OR 97005  
 Telephone: 503-641-1479  
 Classification: NW - EDUCATIONAL ASSISTANT  
 Voice Instructions: None  
 Text Instructions: None  
 Date: 09/20/2007 - 09/20/2007  
 Weekly Schedule: Thursday 07:00 AM - 03:00 PM  
 Directions: Take Hwy 217 South to SW Canyon Road (Exit 2A) Turn right on SW Canyon Road Turn right on SW 141st Ave Turn left on Brigadoon Ct School is at the end of the culdesac on the right side of the road. Enter in the door with marked sign Cascade Academy (door facing East) and please sign in at desk. NOTE: Cascade Academy is located west of Tektronics between Millikan and Canyon (or TV Hwy.) off 141st. It is in an office cluster in the Beaverton Tech Center. Parking: Best to park in lot in front of the school's main east entrance door. Report To: Secretary, Kristen Faust or Principal, Dionne Bradley School Hours: 7:00 – 3:00 (Classes start at 7:30). School day for students runs 7:30-1:30. EA's work 7:00-2:30 and Certified Teachers work 7:00-3:00. EA's may be excused by staff after work is completed. Notes: The substitute should sign in at arrival at the front office desk. Any questions may be answered by the secretary or Principal. The substitute may pick up a basic schedule of the day and class list at the sign in area.

- If you choose to accept a job, simply click the Accept job button. **Please note the Job Number in bold at the top of the page, this is your confirmation number.**
- If you are not interested in the job, click Decline Job and it will remove the specific job from your list of available jobs
- If you are unsure if you want to confirm a position click Return to List and the job will remain available to you but not confirmed. Please note that the position may be accepted by someone else and is not guaranteed to be available at a later time/date

**Review Assignments** – In this area you can review future and past assignment information by date or job number in list or calendar format. This is useful not only to check information about an upcoming assignment but also to see when and where you worked in the past.

- You can obtain additional information on any assignment by clicking on the Job #

**Review Assignments**

Display Format:  List  Calendar

Search From:   To:

Job Number:  Note: Search by job number will not use the date range

Job #	Start Date/Time	Location	Employee in for
	End Date/Time	Classification	Work Days
10	08/08/2007 08:00 AM	NW - ADTP/ TUALATIN VALLEY MENTAL HEALTH	Vacancy
<del>Cancelled</del>	08/10/2007 12:00 PM	NW - EDUCATIONAL ASSISTANT	Wed Thu Fri
<u>55</u>	08/08/2007 08:00 AM	BK - BANKS ELEMENTARY	CUMMINS, WILLIAM
	08/08/2007 04:00 PM	BK - SECRETARY	Wed

**Cancelling Assignments** – This area gives information on cancelling an assignment you have previously agreed to in the event you will be unavailable. Please note that if you cancel an assignment for a day, you will be removed from the available list for that day.

- To cancel a position, look up the assignment under Review Assignments and click on the Job # to pull up the job details.
- When cancelling a job you will be asked to provide a reason for the cancellation.
- You cannot cancel a job online less than 1 hour before the positions start time. In the event you need to cancel within 1 hour of the positions start time, you must contact your districts administrator by phone
- If an assignment is cancelled by a teacher, the system will notify you of this by calling once an hour during regular calling hours until you are reached. If an assignment is cancelled, you will automatically be made available for other jobs during the time of the cancelled job.

### Review Assignment Detail

Job Number: 142

Job Status: Active/VR Assigned

Employee in for: WYNNE, ANTHONY

Location: NW - CASCADE ACADEMY

Address: 14255 SW Brigadoon Ct.

Beaverton, OR 97005

Telephone: 503-641-1479

Classification: NW - EDUCATIONAL ASSISTANT

Voice Instructions: None

Text Instructions: Classes start at 7:45, preferred arrival at 7:00, but 7:30 would work as well.

Date: 09/04/2007 - 09/14/2007

Weekly Schedule: Monday 07:00 AM - 02:30 PM

Tuesday 07:00 AM - 02:30 PM

Wednesday 07:00 AM - 02:30 PM

Thursday 07:00 AM - 02:30 PM

Friday 07:00 AM - 02:30 PM

Directions: Take Hwy 217 South to SW Canyon Road (Exit 2A) Turn right on E left on Brigadoon Ct School is at the end of the culdesac on the right side of the Cascade Academy (door facing East) and please sign in at desk. NOTE: Cas between Millikan and Canyon (or TV Hwy.) off 141st. It is in an office cluster in

Location Announcement: in lot in front of the school's main east entrance door. Report To: Secretary, Ki Hours: 7:00 – 3:00 (Classes start at 7:30). School day for students runs 7:30- work 7:00-3:00. EA's may be excused by staff after work is completed. Notes office desk. Any questions may be answered by the secretary or Principal. The and class list at the sign in area.

### A Cancellation Reason is required to cancel this assignment

Cancellation Reason:

## Phone System

The call in number is (503) 614-1691 to access the system by phone.

### Chapter 3 Telephone Access

This chapter provides information and procedures for accessing SmartFindExpress using a telephone (Interactive Voice Response).

#### Registration

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 and should never be used by anyone else. If you are not registered, you will not be called and offered or assigned to any jobs.

To register, follow these steps:

1. Call the main system number.
2. Enter your Access ID, followed by the star (\*) key.
3. Enter your PIN, followed by the star (\*) key.
4. If your Access ID and PIN are the same number, you will be asked to enter a new PIN before you can continue using the system. PIN numbers must meet the minimum length that has been setup in the parameters and can only contain numeric information.
5. If there has been no voice recording of your name, you are asked to record your name. Record your name and when you have finished recording, press the star (\*) key.
6. Finally, you will hear the telephone number that the system will call you. You can modify this number.

#### Call-in

Substitutes can call the system and enter their Access ID and PIN, both followed by the star (\*) key. From the main menu, select one of the following choices.

1. **Review or Cancel Assignments**  
Information played about the job includes the absent employee's name, location, classification, dates, and times of the job and special instructions. Current and future jobs are played in job number order. There is no option to hear past assignments. After each job is played, you may be allowed to cancel the job. If this option is not played, then contact the system operator for assistance. When canceling a job, you may be asked to enter a reason for canceling the assignment from a list of decline/cancellation reasons. Canceling an assignment on the day of the job may result in being disqualified from being offered other jobs for today.
2. **Hear Available Jobs**  
If this feature is enabled, you can listen to available jobs. The number of jobs played depends on how many are available to hear at that time. During morning callout times only jobs for today are played.
3. **Review or Modify Callback (telephone) number**  
The number currently in your profile is played. Enter all digits that will be required to call you from the location of the system. Include the long distance code and/or area code.
4. **Review or modify Temporary Do not Call Time**  
If this feature is enabled, enter a time that the system can resume calling you.

5. **Review or Modify Unavailability dates**  
Your current and future unavailability dates are played in start date order. You are not offered jobs that occur during this period. The unavailability period does not restrict you from calling the system and hearing jobs for any date.
6. **Review or Modify Daily Availability**  
Your menu choices are:
  - To review or delete time periods you are available to work
  - To enter a new time period you are available to work
  - To review or delete a time period you do not want to receive calls
  - To enter a new time period that you do not want to receive calls.When entering a time period, you will be asked to choose the days of the week and the times.
7. **Change PIN or name recording.**

### **Call-out**

Substitutes are the only users who are called and offered jobs. The system will only call a substitute after the substitute has called the system to register and create a PIN. The system may also call to inform a substitute of an assignment cancellation.

When called, the substitute can:

- **Press the star (\*) key for the system to wait up to 2 minutes**  
When the system calls, if someone else answers the telephone and has to locate you or you have to locate your login information, the system can be told to wait for approximately two minutes. If, at that time no Access ID is entered, the system will disconnect and record that the result of the call was a no answer.
- **To access the system**  
Enter your Access ID and PIN, both followed by the star (\*) key.

### **Job Offers**

When the system calls you about an open job, the job information will play, including the absent employee's name, the location, the classification, and the dates and times of the job. Also, if special instructions were recorded for the job, they will be played to you. You can accept or decline the assignment. If you decline the assignment you will be asked to enter a reason for the decline and you may be disqualified from other job offers for that day during the morning callout only.

### **Assignment Cancellation**

Substitute cancelled assignment notification calls are made once an hour during callout periods. The details of the cancelled job are played. You will automatically be made available for other jobs during the time period that was held by the now canceled job.