SmartFindExpress

Employee User Manual

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Getting Started

The Employee main menu enables you to perform the following functions:

- View important district-wide announcements
- Create absences
- Review/Cancel absences and view Absence Approval history
- View Reason Balance history
- View/update Profile information

Logging In

You do not need a new User ID or PIN/Password for SFE Mobile. Just enter your existing SmartFindExpress ID and PIN and click Submit to access the system.

Trouble signing in? Link

Click on the 'Trouble signing in?' link if you have forgotten your password.

Enter your User ID and the security code shown on the screen. Click Submit. Your password will be sent to the email address on your profile.

Home Page

After successfully signing into the system, the SmartFindExpress Home page displays. Any employee or substitute announcements are displayed. Click on the 'Main Menu' icon to display the menu options.

Menu Option	Description
Home	Displays the Home page. View any announcements.
Create an Absence	Displays the Create Absence page for creating absences.
Review Absences	Displays the Review Absences page for reviewing/canceling absences and for viewing absence approval history.
Reason Balances	Displays Reason Balance information.
Profile	View Profile information and view/change email address and password.
Help	Displays the User Guide.
Sign Out	Exits the user out of the system.

Creating Absences

Select Create an Absence to display the Create Job page.

To Create an Absence:

1. Tap Create an Absence to access the Create Job page. The page displays with the Location and Classification fields.

2. The Location field displays your primary location. To report an absence for a different location, use the dropdown menu to change the location of the job.

3. The Classification field displays your primary classification. To report an absence for a different classification, use the dropdown menu to change the classification of the job.

4. Select a reason to assign to the absence. If a budget code is associated with the reason, the Budget Code field is displayed.

Note: If you select a reason that requires administrator approval, a message will display on the screen to alert you that the reason requires approval. You can continue creating the absence or choose another reason for the absence. An Approval Comment box also displays for entering any comments about the absence.

5. Use the calendar to select a single day or date range for the absence. The current date is always selected by default. Once selected, the selected location's start and end times are displayed on the schedule. To change the hour/minute or am/pm indicator, select the field and then use your keyboard to make changes.

6. In the 'Is a Substitute required' field, the value set to 'No'. To change the value to 'Yes', tap the 'No' button to change the value to 'Yes'.

7. Once selected, the Substitute Start/End times are displayed on the schedule. The Substitute times default to the location times. To change the hour/minute or am/pm indicator, select the field and then use your keyboard to make changes.

8. In the 'Specify a Substitute ID' field, enter the substitute's ID number. If the ID number is unknown, click on the Name Lookup button to display the Substitute Name Lookup page.

9. In the 'Substitute Prearranged' field:

   - Leave the value set to 'No' if the substitute has *not* accepted the assignment. Phone calls will be made to offer the substitute the job. If the specified substitute does not accept the job, the system will call other qualified substitutes.
   - Click on the 'No' button to change the value to 'Yes,' if the specified substitute has accepted this assignment. The substitute will be assigned to the absence and the system will not call the substitute.

10. In the 'Substitute Instructions' field, add any instructions you want to provide to the substitute. These instructions will also be voiced to the substitute over the telephone.

11. Attach any files that you want to provide to the substitute or administrator. Up to three attachments can be added.

12. After all absence information has been added, tap *Continue* to view the Create Absence Confirmation page. If any errors are detected on the form, you will have the opportunity to make corrections and then continue with creating the absence.

13. The Create Absence Confirmation screen is displayed. Verify the absence information and then click 'Create Absence' to create the job and receive a job number. To make changes to the absence information, click 'Cancel' to return to the Create Absence form.

14. Clicking the Create Absence button displays the Create Absence Verification screen. A job number is created for the absence.

Note: *You must receive a job number for your absence to be recorded in the system and to receive a substitute.*

Reviewing Absences

Select Review Absences to review, cancel, or modify a job and to review Absence Approval history by location and approval status.

To review an absence:

1. Click Review Absences. The Review Absences page displays.

2. Enter a job number or search for absences by date range. Dates can be any date in the past, present, or future.

3. Choose a location for the absence requests.

4. In the Approval Status field, check the approval status(es) that you want the history for.

5. Click Search. The list of absences displays. You can update or cancel future absences. The Status and Level fields show the approval status for the job and the approval level. The Level shows the approvals received highest level compared to the reason level required.

6. To view the details of an absence, tap on the job number of the absence. The Review Absence Detail page is displayed

7. To **cancel the absence**, click the Cancel Job button. The system will notify the substitute of the cancelled job by placing a telephone call to the substitute. If the assigned substitute does not need to be notified of the cancellation, uncheck the "Notify the substitute of a cancellation?" option.

8. To modify the special instructions for an absence, make any updates in the 'Text Instructions' field and click Save. The absence details are updated.

9. If reviewing a job that requires approval, click on the Approval Status link to view the Absence Approval History log.

10. The Absence Approval History page for the job is displayed. The log shows the history of actions performed on the request for each level. Comments can be added in the Comments field.

Viewing Reason Balances

Select Reason Balances to review your reason balance allocations. Your reasons and reason balances are displayed.

Field	Description
Name	The name of the reason that has the reason balance.
Uses Allocation From	The name of the reason that shares allocated reason balance amounts with the reason shown in the Name field.
Calculation Date	The start date of the reason balance calculation.
Allocation	The number of hours allocated to the employee for this reason.
Balance	The balance that remains for the reason. When the balance reaches zero, absences cannot be created using this reason

Viewing Profile Information

From the **Profile** menu, you can view status and address information, update your email address and change your password.

Profile

Tap the **Information** option to view your current status in the system and see the address that your profile is associated with. Contact your system administrator with any changes.

Update Email Address

Tap the **Update Email** option to display the Email page. To change your email address, type in your new email address and then re-enter the new email address again. Click Save.

The system automatically sends Job Creation and Job Cancelation emails (if you district uses this feature).

Change Password

Tap the **Change Password** option to change your password. To change your password, enter your current password and then enter the new password twice. You can enter up to 9 digits. Click Save.