SubFinder® for Employees

Users Guide for SubFinder 6.1

CRS
Advanced Technology
Human Resource Management Tools

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What is SubFinder?

It's an employee absence management and substitute placement system used by organizations throughout North America. Employees, like you, can report an absence, and if a substitute is required, it will be made available to qualified substitutes based on the criteria defined by your human resources department. SubFinder is available 24 / 7 via the telephone and Internet, so you can access the system at any time.
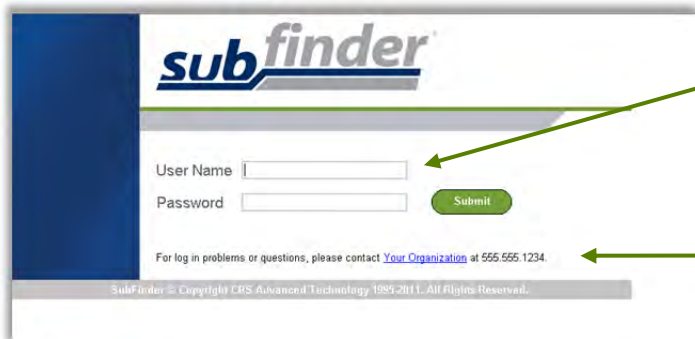
Registering with SubFinder

1. Call SubFinder at _____.

2. SubFinder will identify itself and ask you to enter your PIN followed by the # key.

3. SubFinder will acknowledge that this is the first time you have called and ask you to voice your name. Please say your first and last name clearly, as you want it to be heard by other people using the system. When you are done speaking press the # key. After pressing the # key SubFinder will play your recorded name back to you for verification. If it is correct, press 1. If you want to re-record your name, press 2 and repeat this step again.

4. Once you have recorded your name and accepted it, SubFinder will play your Main Menu. Please choose option 4 – To Review Personal Information. If any of the information is incorrect, contact your SubFinder Operator at _____.

    ⓘ You must register with SubFinder prior to any features being available via the phone or online.

Logging into SubFinder

SubFinder can be accessed from your home or office computer, or any computer that has an Internet connection. Simply enter your organization's SubFinder web address in your Internet browser address line, press **Enter** on the keyboard, and the SubFinder log in screen will appear.

Enter your last name in the **User Name** field and your PIN in the **Password** field and click **Submit.**

Contact the person displayed here for any problems or questions on accessing or using SubFinder.

Upon successful login the Welcome screen will appear. Any welcome messages and/or important information from your Site Administrator will be displayed.

On the left side of the screen are the buttons that give you access to various options. These include:

- **Report Absence**
- **Review Absence**
- **Personal Info**
- **Tutorial**
- **Log Out**

Reporting an Absence

1. Click the Report Absence button

   - The site field will display your home site.

   - The position field will display your primary position.

2. Enter the **Start** and **End** dates for your absence. If the times differ from your normal work times (i.e., a half-day absence), enter the specific times. If the job start and end times differ from the absence start and end times, enter the appropriate information.

3. For a multiple day absence you'll need to specify whether the absence and job times will follow your normal employee schedule (i.e. starting at 12:00PM on the first day and ending at 4:00PM on the last day) or the same times daily (i.e. only 12:00PM – 3:30PM each day).

4. Select an absence **Reason** from the drop down menu by clicking on the down arrow and then clicking on the appropriate reason. You may be asked to enter a miscellaneous code or Activity ID after selecting the reason.

5. Choose a **Job Type** by clicking on the down arrow and choosing from Substitute Required, No Substitute Required, Prearranged Substitute, or Requested Substitute.

   ⓘ If enabled and you have chosen Prearranged Substitute or Requested Substitute, you will be prompted to choose the substitute's name. You may also see the option to 'Use Request List' if Requested Substitute is selected. SubFinder will call those substitutes assigned to your request list. This list can be managed within your Request List tab in your Personal Information.

Prearranged Substitute - SubFinder will automatically place that person in your assignment. Prearranging a substitute assumes that you made personal contact with that individual and they verbally committed to working for you; SubFinder will not call a Prearranged Sub.

Requested Substitute - SubFinder will contact a requested substitute, exclusively, for a period of time defined by your HR department. If the person does not express their interest in the assignment within the defined time requirement, SubFinder will automatically release the job to other qualified substitutes.

6. Special Instructions can be added as a file attachment or as a text-based message. If you choose to add a file attachment, simply click the **Browse** button. You will be prompted with a window where you can browse your computer to find the file you want to attach.

Special Instructions

Attach File: C:\Lesson Plans\Lesson Plan 6-15.docx   Browse...

Enter Text-based Special Instructions:

Please review the attached lesson plan for details. Have a great day!

7. Confirm that all of the information you have entered is correct, then click **Save Job**. If the information is not correct, update the information or click **Cancel**.

8. After clicking **Save Job**, the job number will be displayed at the top of the screen. You must write the job number down for future reference. If this is a pre-arranged job, you will want to provide the substitute with the job number as well.

Your request has been successfully saved. Your job number is 674.

Please note that this request is Pending Approval. If you have requested or prearranged a substitute, that substitute will not be contacted and/or assigned until the request has been approved.

ⓘ If your organization is using absence approval and this absence requires approval, an additional message will be displayed.

Review/Edit/Cancel Absence

1. To review your absences, click the **Review Absence** button.

2. Make the appropriate selections from the filter criteria. You may review your absences by:
   - Date or Date Range
   - Job Type (i.e., Requested Substitute, Substitute Required, etc.)
   - Job Status (i.e., Filled, Unfilled, etc.)
   - Substitute

Selection Criteria:

☐ Date   Start 06/15/2011 End 06/15/2011   Run Request
☐ Job Type   Substitute Required
☐ Job Status Unfilled
☐ Substitute 🔍

3. Click **Run Request**.

ⓘ If you do not want to filter the information, simply leave the boxes unchecked; all absences for the current year will be shown.

Order By ⦿ Date & Time   ○ Job ID

Job List
Click on the job ID to view details   Display 10 rows on page 1 of 1

Job ID	Absence Description	Job Status	Approval Status	Substitute	SI	SN
674	06/15/2011 08:15 AM until 06/15/2011 03:30 PM(A)	N/A	P (0/1)	Alam, Ebby	F,T	N/A
673	06/14/2011 08:15 AM until 06/14/2011 03:30 PM(A)	Filled	A	Beck, Annabell	N/A	N/A
506	05/27/2011 07:00 AM until 05/27/2011 03:30 PM(A)	None	N/A		N/A	N/A
505	05/26/2011 07:00 AM until 05/26/2011 03:30 PM(A)	Filled	N/A	Alam, Ebby	N/A	T

Description: (A) = Employee's Schedule (S) = Same Times Every Day
Approval Status: P = Pending Approval, A = Approved, D = Disapproved
SI = Special Instructions: F = File Attachment, T = Text-based Message, V = Recorded Message
SN = Substitute Notes: T = Text-based Message

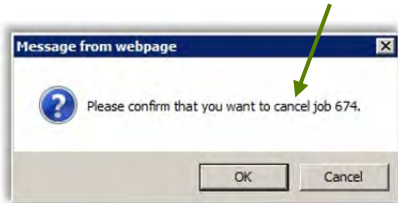You may order your absences within the grid by Date & Time or Job ID.

If your district has chosen to use absence approval the column for Approval Status will be displayed along with the status for each absence.

4. Click the **Job ID** button which is displayed next to each absence. You will be taken into the Review Absence screen.

Job ID	Absence Description
674	06/15/2011 08:15 AM until 06/15/2011 03:30 PM(A)
673	06/14/2011 08:15 AM until 06/14/2011 03:30 PM(A)
506	05/27/2011 07:00 AM until 05/27/2011 03:30 PM(A)
505	05/26/2011 07:00 AM until 05/26/2011 03:30 PM(A)

5. Click **Replace** or **Remove** to edit the file attachment.

6. To cancel the absence click the **Cancel Absence** button at the top of the page, a screen will appear asking you to verify that you wish to cancel the absence. To confirm the cancellation, click **OK**. If you do not wish to cancel the absence, click **Cancel**.

Review Absence

Cancel Absence

Abreo, Dalia C
Site: Parkade Elementary
Position: Elementary Grade 5

Absence Info

Start Date/Time 06/15/2011 08:15 AM — End Date/Time 06/15/2011 03:30 PM
○ Follow Employee Schedule ○ Same Time Daily

Job Info

Start Date/Time 06/15/2011 08:15 AM — End Date/Time 06/15/2011 03:30 PM
○ Follow Employee Schedule ○ Same Time Daily

Reason: A116 District Business
Approval Status: Pending Approval (0/1)
Miscellaneous Code:
Job Type: Requested Substitute
Substitute: Alam, Ebby G

Special Instructions

File Attachment: Lesson Plan 6-15.docx [Replace] [Remove]
(click on file name to view attachment)
Enter Text-based Special Instructions:
Please review the attached lesson plan for details. Have a great day!

[Save Job] [Cancel]

Message from webpage

? Please confirm that you want to cancel job 674.

[OK] [Cancel]

(i) The **Cancel Absence** button will only be available if you are cancelling prior to the cancellation deadline established by your HR department.

7. If you made changes to your absence click **Save Job** otherwise click **Cancel**.

Substitute Notes

1. Substitutes have the option to leave notes regarding the job(s) they've worked for you. This message can be created once a job starts and updated as necessary. To review a substitute note, click the appropriate Job ID button.

2. The substitute notes will be displayed as view only, and are also made available to your site administrator(s) and system operator(s).

3. Click **Cancel** to return to job list.

Job Type: Prearranged Substitute
Job Status: Filled
Substitute: Alam, Ebby G

Special Instructions
Enter Text-based Special Instructions:

Substitute Notes

You had a wonderful group of students. They were very well behaved and everyone completed their in-class projects. I would be happy to substitute for you anytime. Thanks, Ebby!

[Cancel]

1. To view your personal information, click the **Personal Info** button. A screen will appear that includes your Name, SubFinder-assigned ID Number, PIN, and Employee Number along with several tabs:

   - General Info
   - Address
   - Certification
   - Leave Control
   - Itinerant Schedule
   - Schedule
   - Request List

   Depending on the permissions established by your organization, you may be able to edit the name and PIN fields.

2. The **General Info tab** displays your Home Site, assigned Calendar Track, Primary and Secondary Job Positions, specific Start and End Work Hours (if different than the site's normal hours), Hire Date, Date Added (the date you were added to the SubFinder system), and Certified/Classified status.

3. The **Address tab** displays your address, phone number, and email. Depending on the permissions established by your organization, you may be able to edit the address, telephone number, and email fields.

   (i) Your organization may choose to send you, as an employee, email notifications regarding the status of your absences. The notifications may be sent anytime a substitute fills one of your jobs, a substitute is cancelled out of one of your jobs, your absence has been modified, substitute notes have been added or edited, your absence has been approved or disapproved or your one of your certifications is about to expire. Your SubFinder operator will be able to tell you if they are using the email notifications feature.

4. The **Certification tab** displays any certifications you hold and their expiration dates.

5. The **Leave Control tab** displays the absence reasons which are being controlled, along with the corresponding time you have used and the time that is still available. If your organization chooses *not* to use this option, this area will be blank.

6. The **Itinerant Schedule tab** displays your personal schedule if you work at multiple locations or in more than one position. It includes sites, positions, and times for each segment of the schedule. If your organization chooses *not* to use this option, the area will be blank.

Tuesday			
8:15 AM	12:00 PM	Parkade Elementary	Elementary Grade 5
1:00 PM	3:00 PM	Blue Ridge Elementary	Elementary Art

Thursday			
8:15 AM	12:00 PM	Parkade Elementary	Elementary Grade 5
1:00 PM	3:00 PM	Blue Ridge Elementary	Elementary Art

7. The **Schedule tab** displays your schedule in an easy to view format. Days off are red and absence days are yellow.

8. The **Request List tab** displays a listing of substitutes that have been assigned to your Requested Substitutes list and a list of Available Substitutes that can be assigned. Use the left and right arrows to move substitutes between each list. Use the Move Up and Move Down buttons to order the substitutes on the list.

Tutorial

1. Click on the **Tutorial** button to begin an online video guide for SubFinder. The online video will open in a new pop-up screen.

Getting to Know SubFinder®
Online Tutorial for Employees

iCRS
Advanced Technology

SubFinder Version 6.1

Log Out

1. When you are ready to leave SubFinder, click the **Log Out** button. You will return to the SubFinder log in screen.

sub*finder*®

User Name
Password   Submit

For log in problems or questions, please contact ABC School District at 555-555-5555.

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SubFinder Phone Instructions

You can call SubFinder to report, review, or cancel absences, and to review and change your personal information. Before any functionality is available you must register with the system by voicing your name.

(i) Pressing 9 will take you back to the previous Menu. Pressing * will allow you to move to the next item when listening to a list of items, such as absences.

1. Call the main SubFinder system and enter your PIN.

Your Main Menu:

To Report an Absence	**Press 1**
To Review an Absence	**Press 2**
To Cancel an Absence	**Press 3**
To Review Personal Information	**Press 4**
To Leave the SubFinder System	**Press 9**

Report an Absence

1. Press 1 to Report an Absence

2. Enter the absence start/end dates and times. Specify if the absence is for all day today, all day the next work day or enter specific dates and times. The default times for your absence will play. If your absence differs from these times enter the correct absence times. If the job start and end times differ from the absence start and end times, enter the appropriate information.

3. If enabled, you will be provided with a prompt to voice your grade level if one is not already recorded.

4. Enter the reason for the absence. SubFinder will play a list of absence reasons.

5. Select whether a substitute is required for the absence.

6. If a substitute is required, choose to have SubFinder select a substitute, prearrange a substitute or request a specific substitute. If enabled and prearranging or requesting a substitute enter the substitute's SubFinder assigned ID #.

7. If special instructions are required you may choose to record a short message. When finished SubFinder will repeat your message.

8. SubFinder will provide you with a Job Number.

Always wait for the job number to play before disconnecting your call or your absence may not be recorded.

Review an Absence

1. Press 2 to Review an Absence

2. SubFinder will play all of your scheduled absences, beginning with the next one scheduled and moving into the future. After each absence you will be given the option to:

- Hear the absence again
- Hear the next absence
- Cancel the absence
- Change the special instructions
- Record special instructions

➢ The option to cancel an absence will only be available if you are calling prior to the cancellation deadline set by your HR department.

➢ The option to change special instructions will only be available if you originally recorded special instructions.

➢ The option to record special instructions will only be available if you did not originally record special instructions.

Cancel an Absence

1. Press 3 to Cancel an Absence

2. Enter the job number

3. SubFinder will play the absence along with the option to cancel the absence.

Review Personal Information

1. Press 4 to Review Personal Information

2. SubFinder will provide you with the following information:
   - Home site
   - Standard work times
   - Primary job position
   - SubFinder assigned ID
   - Name as recorded

    To change your home site, work times or primary job position contact the SubFinder operator.

3. You will be given the option to record your name or itinerant schedule. The option to record your itinerant schedule will only be available if you are set up within SubFinder as an itinerant employee.