

San Diego Unified School District - Administrator Reference Guide

System Phone Number	(619) 297-0304								
Help Desk Phone Number	(619) 725-8090								
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Web Browser URL	https://www.sandi.net/personnel/subs								

THE SYSTEM CALLS SUBSTITUTES DURING THESE TIMES

	Today's Jobs	Future Jobs
Weekdays	Starts at 5:00 am	5:00 – 9:30 pm
Saturday	None	5:00 – 9:30 pm
Sunday	None	5:00 – 9:30 pm
Holidays	None	5:00 – 9:30 pm

REASONS FOR ABSENCE / VACANCY

ADMINISTRATOR ONLY

EMPLOYEE

Number	Description	Number	Description
8	Vacancy	1	Illness
28	Extra Help	2	Personal Necessity
29	Extra Help / Roving	3	Bereavement
30	Administrative Leave	4	Personal Business
31	PPI (Profess./Personal Improve.)	5	Vacation
51	Long Term Illness	6	Workers Compensation
52	Long Term Personal Emergency	7	Jury Duty
53	Long Term Bereavement	10	Religious Holiday
55	Long Term Vacation	11	Court Appearance
56	Long Term Workers Comp	13	Paternity / Adoption
57	Long Term Jury Duty	14	Military Leave
58	Long Term Vacancy	15	Unpaid Personal Leave
61	Long Term Court Appearance	16	Floating Holiday
63	Long Term Paternity	17	Comp Day
64	Long Term Military Leave	21	Union Business
65	Long Term Unpaid Personal	26	Professional Development
76	Long Term Professional Dev't		
78	Long Term Extra Help		
79	Long Term Extra Help/Roving		
80	Long Term Administrative Leave		

TELEPHONE ACCESS INSTRUCTIONS

1. Enter your **Access ID** (your nine digit **Administrator ID**), followed by the star (*) key
 2. Enter your **PIN** (Personal Identification Number), followed by the star (*) key
- **Contact the Substitute Help Desk to create a new PIN number for any security needs that you may have with past users.

MENU OPTIONS

- 1 – Create an Absence
- 2 – Create a Vacancy
- 3 – Review, Cancel Absence or Modify Jobs
- 4 – Hear Job Counts
- 6 – Record Announcements
- 9 – Exit and hang-up

1 — TO CREATE AN ABSENCE

1. Enter the Absentee's Employee ID, followed by the star (*) key
2. 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
 - PRESS 9** to Exit to menu options
3. If you pressed 3 to Enter Dates and times
 - Enter Start Date
 - PRESS 1** to Accept the date offered
 - PRESS 2** to Enter start date
 - Enter two digits for the month and two digits for the day (MMDD)
 - PRESS 9** to Exit to menu option.

For all options, enter times

Enter Start Time

PRESS 1 to Accept offered time

PRESS 2 to Enter time

Enter two digits for the hour and two digits for the minutes in HH:MM format.

Enter 1 for am or 2 for pm

PRESS 9 to Exit to menu options.

Repeat procedure for end date and time

4. Enter the reason from page 1 followed by the star (*) key or wait for a list of reasons
 - PRESS 1** if Correct
 - PRESS 2** to Re-enter
 - PRESS 9** to Exit to menu options
5. Record Special Instructions
 - PRESS 1** to Record special instructions.
 - PRESS 2** to Bypass this step
6. Is a Substitute Required?
 - PRESS 1** if a substitute is required
 - PRESS 2** if a substitute is not required
 - PRESS 9** to Exit to menu options
7. If you **pressed 1**, a substitute is required
 - PRESS 1** to Request a particular substitute.
 - Enter the Substitute Employee 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 9** to Exit to menu options
 - PRESS 2** to Re-enter
 - PRESS 2** to Bypass requesting a substitute

8. Complete Absence

PRESS 1 to Receive the job number

Record the Job Number. The Job Number is your confirmation.

PRESS 1 to Hear the job number again

PRESS 9 to Exit to menu options

PRESS 2 to Review absence information

2 — CREATE A VACANCY

1. Enter a Classification followed by the star (*) or wait for a list of classifications.

PRESS 1 if Correct

PRESS 2 to Re-enter

PRESS 9 to Exit Menu Options

2. Enter calendar followed by the star (*) key or wait for a list of calendars

PRESS 1 if correct

PRESS 2 to re-enter

PRESS 9 to exit to menu options

3. Continue with the steps for creating an absence beginning with step 2.

3 — TO REVIEW, CANCEL, OR MODIFY JOBS

1. **PRESS 1** to enter a job number

Enter a job number, followed by the star (key)

PRESS 2 to hear a list of current / future jobs listed in chronological order

PRESS 3 to hear a list of today's jobs

PRESS 4 to hear a list of tomorrow's jobs

PRESS 5 to hear list of jobs on specific dates

Enter the date in MMDDYY format. Enter two digits for the month, two digits for the day, and two digits for the year.

PRESS 9 to exit to menu options.

2. Hear the job information. The pound (#) sign fast forwards to job details

PRESS 1 to Hear absence information again

PRESS 2 to Cancel job

PRESS 3 to Modify the job information

PRESS 4 to Verify job information

PRESS 8 to Hear the next job

PRESS 9 to Exit menu options

3. If you **pressed 2** 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 the a request to cancel the job, wait for the system to say, "Job Number has been canceled."

PRESS 9 to Exit and hear next absence (Do not cancel)

4. If you **pressed 3** to Modify job information

PRESS 1 for Start date

PRESS 2 for End date

PRESS 3 for Start or end time

PRESS 4 Special instructions

PRESS 5 for Reason

PRESS 7 to Change specified substitute

PRESS 9 to Exit and hear next job

If you press 1 thru 7, follow the telephone instructions to complete the job modification

Once you confirm a request to cancel the job, you **MUST** wait for the system to say "*Job Number has been cancelled.*"

4 — TO HEAR JOB COUNTS

1. **PRESS 1** for today's job count
PRESS 2 for tomorrow's job count
PRESS 3 for a Job count on a specific date
Enter the date in MM/DD/YY format. Enter two digits for the month, two digits for the day and two digits for the year.
PRESS 9 to Exit to menu option
2. Hear the total job count and open job count

6 — RECORD ANNOUNCEMENTS

1. **PRESS 1** to Record announcement
PRESS 2 to Delete an announcement
PRESS 9 to Exit to menu options
3. If you pressed 1 to record an announcement
Record the announcement, followed by the star (*)
PRESS 1 to accept
PRESS 2 to Re-record
PRESS 9 to Exit to menu options.

BROWSER ACCESS INSTRUCTIONS

SIGN IN

Open your web browser and access the SmartFindExpress sign in page. Review the messages above the Sign In. Enter your 9 digit Admin ID (starts with 800) and PIN. Review additional announcements on your home page, if any.

ANNOUNCEMENTS

Choose the *Announcements* Link

- Create a new announcement
 - Select *New* button
 - Select the location for the announcement (default is your location)
 - Type in the text of the announcement
 - Select the *Save* button

CREATE AN ABSENCE

Choose the *Create an Absence* link

- **Enter employee's ID or use the *Name Lookup* button.** If *Name Lookup* is selected
 - Enter the employee's first or last name (enter full or partial name)
 - Select the *Search* button
 - Select the Employee from the list by choosing the *Name* link
- Select a Location (default is employee's primary location)
- Select Classification (default is employee's primary classification)
 - To select a different classification, click the drop-down menu and choose the classification
- **Select Reason for this absence from the drop-down menu**
- **Select Start and End Dates for your absence**
 - Enter the dates with forward slashes (MM/DD/YYYY) or use the calendar icon
- **Select Start and End Times for your absence. Default times are listed**

- To change defaults, enter the time in HH:MM am or pm format
- Ensure that the correct time is entered. If the times for the substitute are different than the absence times, please enter the adjusted times
- Multiple Day (Recurring) Absence. Select the *Modify Schedule* button
 - The default work schedule is shown. Remove the checkmark(s) from the Work Days boxes that do not apply to this absence
 - Modify daily schedule and/or times for absence and substitute
 - Select the *Continue* button
- Request a particular substitute
 - Enter the substitute's employee ID number or use the *Name Lookup* button to find the substitute by name
- Indicate if the requested substitute has accepted this job
 - Yes = substitute is prearranged and will not be called and offered the job
 - No = call will be placed and the substitute will be offered the job
- Enter special instructions for the substitute to view
- Enter comments for administrator viewing only
- **Select the Continue button**
- **Select the Create Absence button to receive a Job Number. Please record this Job Number**

CREATE AN ABSENCE

Choose the *Create an Absence* link

Quick Absence Entry for one (1) day Absence for today using default times

Items in Bold are required to complete an Absence and receive a Job Number.

- **Enter employee's ID or use *Name lookup***
- **Select Reason for Absence**
- Specify a Substitute / Prearrange Substitute
- Enter instructions for Substitute and Administrator
- **Select the Continue button**
- Confirm the Absence information
- **Select the Create Absence button to receive a Job Number. Please record this Job Number**

CREATE A VACANCY

Choose the *Create Vacancy* link

- **Select Calendar for Vacancy**
- **Select Location for Vacancy**
- **Select Classification for Vacancy**
- **Follow steps in Create an Absence Entry, starting at "Select Reason"**
- **Select the Create Vacancy button to receive a Job Number. Please record this job number**

DAILY JOB COUNTS

Choose the *Daily Job Counts* link

The Daily Job Count allows you to search and view a count of jobs at your location for a month. Past, present and future job counts can be viewed.

- Select Month and Year (defaults to current month and year)
- Select Reason for absence or leave blank for all reasons
- Select Location (default will be your location)
- Select *Search* button

You may search other months by using the Previous Month or Next Month buttons

JOB INQUIRY/REPORTS

Choose *Job Inquiry/Reports* link

Job Inquiry allows you to search, view and print job reports for your location. Past, present and future jobs may be viewed or modified

Today's Job Inquiry

- Select the *Search* button or *Create Report* button for a list of all jobs for today

Job Inquiry

- **Enter a Job Number or Search criteria for a list of jobs**
Search Criteria
 - Job Types - All (both Absences and Vacancies), Absences and Vacancies
 - Job Status - All, Open & Filled, Open, Filled, Finished & Verified, Finished, Verified, Cancelled
 - Sub Status - All, No Sub Required, Filled, Not Filled.
 - Date Range - Defaults to Today. Enter dates or use the calendar icons to select dates
 - Select the *More Search Options* button to expand search criteria options to create a more defined search
 - Select Sort Order
 - Budget Code, Classification Name, Employee Name, End Date, Job # (default), Location Name, Reason Name, Start Date, Job Status, Job Sub-Status, Substitute Name
 - Select "Then By" Sort order (same options as Sort Order)
 - Select the *Search* button to view a list of jobs or select other options
 - *Create Report* creates a printed report of the selected job Information. A report setup screens allows a choice for the printing of detailed or summary information
 - *Export* creates a data file of the job information
 - If you pressed the *Search* button, select the *Job Number* link to view or modify details of the job
 - Modify job actions to change the job status including stop callout, re-open, cancel, and verify
 - Modify job information - Details of the job (time, reason, substitute, etc.) can be modified prior to the job ending
 - Select the *Save* button
- Other actions on the job detail screen
- *Filling Details* button – Detailed information regarding all calls and disqualifications for the job
 - *Reset* button – Return the data to its original state before selecting the *Save* button
 - *Return to List* button – Return to the list that was created by the search

SIGN IN SHEET

- To print a sign in sheet.
 - Choose *Job Inquiry Report* link
 - Select the *Create Report* button for a list of all jobs for today.
 - Under *Print Details*, uncheck the information that you don't like included on your sign in sheet.
 - Under *Print Totals for Primary Sort*, select *Print a signature line*.
 - Print your sign in sheet
- Require each substitute to sign in and out as proof that assignment was worked and completed. Refer to this list as you verify "Finished" jobs.

VERIFYING JOBS

Timekeepers must verify all jobs in SAMS by the day before the timekeeper cut-off for each payroll period at the latest. However, **it is strongly recommended that timekeepers take a few moments each day to verify *Finished* and *Filled* jobs.**

- To verify jobs, you'll need to have at-hand the printed substitute sign-in sheet for the day(s) you want to verify; then follow the steps below.
 - In the SmartFindExpress (SAMS) system, select *Job Inquiry/Reports*
 - In *Job Type*, select *All*.
 - In *Job Status*, select *Finished*.
 - In *Sub Status*, select *Filled*.
 - Enter the date range (*Search From* date and *To* date) of the jobs you want to verify. If verifying daily, enter the previous work day. Click *Search*.
 - Scroll down to view the search results.
 - With your substitute sign-in sheet for the date(s) selected above in-hand, indicate the jobs which the substitute actually worked (signed in) in either of the following ways:
 1. Manually click the checkbox for each job for which the substitute signed in.
 2. Click ***Set All to Verify***. This automatically checks all the jobs' checkboxes. If not all jobs were actually worked by substitutes, remove checkmarks for those you do not want to verify by clicking the checkbox.
 - Click *Save Verified*.
- The message "Jobs successfully verified" appears at the top of the screen. Hit search again to make sure all jobs were verified. When '*No Records Found*' shows at the top of the screen, then you are finished. The verification process is complete and the time for those substitutes will be loaded into PeopleSoft Time and Labor that evening if it is a workday. The interface does not run on weekends or holiday.
- You should always run your 'Time Summary Report' in PeopleSoft to make sure that all substitute time has populated. If time is missing, please contact the helpdesk to see the reason why the hours are not there.

Substitutes will not be paid unless the jobs they worked have been verified in SAMS.

PRIORITY LISTS

Choose the *Priority Lists* link to view, modify, and print priority lists of substitutes for your location. Substitutes are assigned a list number and level, which determines the order they will be called for jobs. The lowest order is called first.

New Priority List

- Select the *New* button
 - Enter substitute's access ID or use *Name Lookup* button
 - Select List Type from drop-down menu (Preferred)
 - Select ****Classification** from drop-down menu or enter the classification code
 - Select either a location or employee, but not both
 - Enter the sub list and level. (Default is 1)
 - Select the *Save* button

****If it is a classified substitute that you are entering, you **must select the classification** that they worked in, otherwise it will offer them teaching assignments.**

Priority Lists Inquiry

- Enter the search criteria or press the *Search* button for all priority lists
 - Select List Type from drop-down menu (Preferred, Auto Assignment, Do Not Use)
 - Select Classification from drop-down menu
 - Select Location
 - Enter employee's access ID or use *Name Lookup* button
 - Enter substitute's access ID or use *Name Lookup* button
- Select the sort order
 - Select sort by (default Substitute name) and "then by" sort order
- Select the *Create Report* button for a report
 - A report setup screen allows the choice of data to be included on the report
 - Select the *View Report* button
- Select the *Search* button for the search list
 - Modify Priority List
 - Select substitute to modify by selecting the substitute's name
 - Modify substitute list and/or level
 - Select *Save* button
 - Delete Substitute from Priority List
 - Place a checkmark in the Delete box
 - Select the *Delete* button

PROFILE INQUIRY/REPORTS

Choose the *Profile Inquiry/Reports* link to view and/or print a list of Employees and/or Substitutes for your location.

Profile Inquiry Tab

- Enter name, access ID, external ID or call back number (substitute only)
- Select the *Search* button
- Select a profile by clicking the *Select* link by the name
- View basic profile information on the profile tab
- Select employee or substitute tab and links within the tabs for detailed information

Employee Inquiry Tab

- Enter search criteria or select the *Search* button to return all employees at your location(s)
- Select a profile by clicking the *Name* link
- View basic information on the profile tab
- Select the employee tab and links within the tab for detailed information

Employee Report from the Employee Inquiry Tab

- Enter search criteria or leave blank for all employees at your location(s)
- Select the *Create Report* button
 - Select a report type from the report setup
 - Employee Detail Report
 - Employee Labels
 - Employee List
- Select the *View Report* button

Substitute Inquiry

- Enter search criteria or select the *Search* button to return all substitutes at your location(s)
- Select a profile by selecting the *Name* link
- View basic information on the profile tab
- Select the substitute tab and links within the tab for detailed information

Substitute Report from the Substitute Inquiry Tab

- Enter search criteria or leave blank for all substitutes at your location(s)
- Select the *Create Report* button
 - Select a report type from the report setup
 - Substitute Detail Report
 - Substitute List
 - Substitute Labels
 - Substitute Statistics
- Select the *View Report* button

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 browser when you finish with your session.

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.



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