Gloucester County Public Schools

Need Assistance?

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What is SubFinder?

It’s an employee absence management and substitute placement system used by organizations throughout North America. Using SubFinder, administrators can quickly accomplish routine tasks such as adding jobs, reviewing jobs, and running reports along with added editing capabilities at the site level. Site-based administrators can have easy-to-use, secure Internet access to many of the same features available to the SubFinder operator.

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 login screen will appear.

Upon successful login the Welcome screen will appear. The SubFinder menu options are located on the left side of the screen. These options include:

- Job List
- Reports
- Employee
- Substitute
- Preference List
- Site Message
- Site Directions
- Verification
- Log Out

Your specific options will be based on the rights assigned to you by your SubFinder Operator. If you do not have access to one or more of these areas, the corresponding button will not appear on this screen.

Each of these options will be covered in the sections that follow.
Job List

The area is used to add, modify, or view absences and jobs for your site. Click on Job List and the following screen will appear:

Reviewing Jobs

To review existing jobs, choose the appropriate combination of the six available filters - Site, Employee, Substitute, Type, Status, and Date. To choose a filter, place a check in the box next to the criteria you wish to use. You can also select how the jobs will be displayed; choose either Date & Time or Job ID.

NOTE: To search by employee or substitute, place a check in the appropriate box and then click on the + button located directly to the left of the Name Display field. A list of all applicable employees or substitutes will be displayed. You can use the up or down arrows at the end of the field to navigate one page at a time within the list. When you find the desired name, click on it. The field will automatically populate with the selected name and the drop down will disappear.

You can also search by employee or substitute by clicking the button to the left of the Name Display field. A box will appear where you can type the employee's or substitute's name. Type the name and press enter; this will narrow the search. You will then need to click on the + button and click on the appropriate name. The field will automatically populate with the selected name and the drop down will disappear.

Once you have made your selections, click Run Request. A list of jobs matching the selected criteria will appear in the Job List window at the bottom of the screen.
Find the job you wish to review in the list presented and click the **Edit** hyperlink for that job. The following screen will be displayed:

You can see the details for the job on this screen as well as make any changes. Based on your organizations policies you may be able to approve the absence as your editing the record. You may add Job Notes, which are visible to other administrators with access to the job as well as the system operator(s). Substitute notes can only be added or modified by the substitute assigned to the job, and will always be displayed as view only. Some reasons may require administrator approval.

Simply make the necessary changes and click **Save Job** at the bottom of the page. This will update the changes you made to the job.

**NOTE:** If any portion of the absence / job record is in the past, employee field will be read only and cannot be changed.

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**The Job Log**

Each time an absence or job is created, SubFinder creates a job log to record the activity that occurs. The job log starts with the creation of the absence or job and continues until the job is archived.

The Job Log for a specific absence/job can be accessed from the Job List; simply click the **Log** hyperlink to the right of the appropriate job. The following screen will appear:

To see additional details about a particular job log entry, click on the **Details** hyperlink to the right of the entry.
The Job Log details screen will give you more specific details on the selected entry. The information may include (if applicable) the name of the substitute, how the entry was made, the preference list the entry was from, and the line number the call was processed on.

When you are finished viewing the information, click Close and you will be returned to the previous screen. Then click Back and you will return to the Job List.

**Stop Attempting**

To edit a job that SubFinder is currently calling on, click on the Job ID in the job list grid. The job will open in a view only mode:

Click **Stop Attempting**. A popup will appear asking if to confirm the request. To stop SubFinder from calling out on the job, click OK otherwise not click **Cancel**.

You will need to close and reopen the job to make changes after the stop attempting button has been clicked.

**NOTE**: The system will finish its current call with the substitute before the job is released for editing. It is also important to note this feature is optional and may not be enabled within your organization.
Splitting a Job

To split an existing absence or job into one or more pieces, click on the Job ID in the job list grid. The job edit screen will appear:

Click Split. A popup will appear displaying the dates and times of the absence and the job along with several split options:

- **Multiple One-day Jobs:** Choosing this option will result in SubFinder creating a new entry for each working day of the absence or job.
  
  When using this option each of the single-day units will be assigned a new job number.

- **Specify Time – Single-day Job:** This option will only be available when splitting a single-day job into two pieces. Once you select this option SubFinder will ask you to enter the specific time that you want the split to occur.

- **Specify Date – Multiple-day Job:** Choosing this option will result in SubFinder splitting the multiple-day job into two jobs, based on the date that you specify.

Click the Save Job button and you will see the final result of the split.
Adding an Absence

To add an absence, click on **Add New Absence**. The following screen will appear:

- **Site**: If you are a single-site administrator, the correct site name will automatically appear in this field. If you are a site-group administrator, click on the dropdown arrow and select the site where the absent employee works.

- **Employee**: Select the employee for whom you wish to create the absence. To select a specific employee, click on the arrow at the end of the employee field and choose the desired person from the list presented.

- **Calendar Track**: This is the calendar track the absent employee’s schedule follows. This will be populated automatically when you select an employee.

- **Position**: This is the job position the absent employee works. This will automatically populate when you select an employee.

- **Reason**: Select the reason the employee is absent from the drop down list provided.

- **Approval Status**: Some reasons may require administrator approval. Based on your organizations policies you may be able to approve the absence as you add the record.

- **Absence Start Date/Time and End Date/Time**: These values will default to the current date and the standard work times for the selected employee, but may be changed as needed. Dates should be entered using the format MMDDYY. For example: June 01, 2012 would be entered 060112. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Times should be entered using the format HHMM/P. For example: 7:30 a.m. would be entered as 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.

- **Follow Employee Schedule**: Follow Employee’s Schedule is the default and means that each day of the absence will follow the standard work times for that employee.

- **Same Times Daily**: Same Times Daily means that the absence will be reported for the same times each day of the absence. This option typically does not become important unless you have reported a non-standard, multiple day absence for the employee.

For example: The employee’s standard work day runs from 7:45 a.m. until 2:35 p.m. A three-day absence is reported that starts at 11:15 a.m. on Monday and runs until 2:35 p.m. on Wednesday. Choosing Employee’s Schedule would result in a 2 ½ day absence – 11:15 to 2:35 on Monday
and 7:45 until 2:35 on Tuesday and Wednesday. Choosing Same Times Daily would result in a 1 ½ day absence – 11:15 to 2:35 on Monday, Tuesday and Wednesday (three half-days).

- **Job Start Date/Time and End Date/Time:** These values will default to the same values as the Absence Start Date/Time and End Date/Time, but may be changed as needed. Dates should be entered using the format MMDDYY. For example: June 01, 2012 would be entered 060112. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Times should be entered using the format HHMM/PM. For example: 8:25 a.m. would be entered as 0825A. Using this format, the colon (:) will be entered automatically when you tab out of the field.

- **Follow Employee Schedule:** Follow Employee’s Schedule is the default and means that each day of the job will follow the standard work times for that employee.

- **Same Times Daily:** Same Times Daily means that the job will be reported for the same times each day of the job. This option typically does not become important unless you have reported a non-standard, multiple day job for the substitute.

For example: The employee’s standard work day runs from 7:45 a.m. until 2:35 p.m. A three-day absence is reported that starts at 11:15 a.m. on Monday and runs until 2:35 p.m. on Wednesday. Choosing Employee’s Schedule would result in a 2 ½ day absence – 11:15 to 2:35 on Monday and 7:45 until 2:35 on Tuesday and Wednesday. Choosing Same Times Daily would result in a 1 ½ day absence – 11:15 to 2:35 on Monday, Tuesday and Wednesday (three half-days).

- **Select or Enter Misc. Code:** If your site uses miscellaneous codes for the absence reason you selected, you can enter the code by typing it in the text field or by using the drop down list to select the appropriate code.

- **Job Type:** Select the Job Type from the drop down list. You can choose from the following:
  - **No Substitute Required:** No substitute coverage is required for the absence.
  - **Prearranged Substitute:** You already have a substitute who has agreed to fill the absence.
  - **Requested Substitute:** You would like SubFinder to attempt to fill the absence with a particular substitute. SubFinder will call the requested substitute exclusively until the Stop Calling Requested Substitute deadline is met. If the substitute has not been secured at that point, SubFinder will begin using the preference list(s) and skill list.
    
    ▪ **Use Employee Request List:** If this feature is enabled and the job type Requested Substitute has been selected the Use Request List checkbox will appear. When checked, SubFinder will attempt to fill the absence with the Employee’s Request List. SubFinder will call the requested substitutes exclusively until the Stop Calling Requested Substitutes deadline is reached. If a substitute has not been secured at that point, SubFinder will begin using the preference list(s) and skill list.
      
      ▪ **Substitute Required:** You would like SubFinder to find a substitute for you using the absent employee’s preference list(s) and skill list.

- **Job Status:** Depending upon the Job Type selected, one of the following will automatically be assigned:
  - **Filled:** The absence is filled with an appropriate substitute. This status will be automatically applied to Prearranged Substitute absences.
  - **Unfilled:** SubFinder needs to do some work to fill the absence. This status will be automatically applied to Requested Substitute or Substitute Required absences.
  - **None:** This status applies only to No Substitute Required absences.

- **Substitute:** If the Job Type is Prearranged Substitute or Requested Substitute, you must provide
SubFinder with the name of the particular substitute. Select the desired substitute from the list provided.

- **Special Instructions**: Special Instructions are able to be added as a file attachment or text-based. 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. Once you choose the file click **Upload**. The file will be attached. Once uploaded, if you need to replace the file attachment click **Replace**. To remove the file attachment click **Remove**. If you choose to leave text-based special instructions, type them in, review them carefully, and then click **Save**. If you decide that text-based instructions are not necessary, click **Exit**.

- **Job Notes**: Job Notes are a way to record additional information regarding the absence or job. Only you and the SubFinder operator can view the job notes. They will not be included in the job for the employee or substitute to see.

When you have entered all the applicable information, click **Save Job** at the bottom of the screen.

### Adding a No Employee Job

There may be times when you need a substitute at your site but do not have an absent employee associated with the job. For example: your site is conducting standardized testing and you need substitute coverage in the classrooms left vacant by the teachers administering the exam. Instead of adding an absence, you will want to add a job. To add a job, click **Add No Employee Job**. The following screen will be displayed:

- **Site**: If you are a single-site administrator, the correct site name will automatically appear in this field. If you are a site-group administrator, click on the dropdown arrow and select the site that needs extra substitutes.

- **Number of Jobs**: Enter the number of jobs you want to create. When creating more than one job at a time, remember:
  - All jobs created will have the same job position.
  - You cannot prearrange or request specific substitutes when creating more than one job at a time.

- **Calendar Track**: Select the calendar track the job(s) will follow.

- **Position**: Select the job position for the job(s).

- **Reason**: Select the appropriate reason from the drop down list provided.
- **Approval Status**: Some reasons may require administrator approval. Based on your organization's policies, you may be able to approve the absence as you add the record.

- **Job Start Date/Time and Stop Date/Time**: Enter the dates and times that a substitute is required. The times will default to the standard open and close times for the selected site, but may be changed as needed. Dates should be entered using the format MMDDYY. For example: June 01, 2012 would be entered 060112. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Specific start and end times should be entered in an HHMM A/P format. For example: 7:30 a.m. would be entered as 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.

- **Same Times Daily**: SubFinder will automatically default to Same Times Daily for No employee jobs.

- **Select or Enter Misc. Code**: If your site uses miscellaneous codes for the absence reason you selected, you can enter the code by typing it in the text field or by using the drop-down list to select the appropriate code.

- **Preference List**: If you want to select a specific preference list when filling this job, select the list from the drop-down list presented.

  **NOTE**: If you select a preference list, SubFinder will use ONLY that list when trying to fill your job. SubFinder will NOT use the Skill List. If no list is selected, SubFinder will only use the Skill List when filling the job.

- **Job Type**: Select the Job Type from the drop-down list. You can choose from the following:
  - **Prearranged Substitute**: You already have a substitute who has agreed to fill the absence.
  - **Requested Substitute**: You would like SubFinder to attempt to fill the absence with a particular substitute. SubFinder will call the requested substitute exclusively until the Stop Calling Requested Substitute deadline is met. If the substitute has not been secured at that point, SubFinder will begin using either the preference list or skill list, depending which list you assigned to the job.
    - **Use Employee Request List**: If this feature is enabled and the job type Requested Substitute has been selected, the Use Request List checkbox will appear. When checked, SubFinder will attempt to fill the absence with the Employee’s Request List. SubFinder will call the requested substitutes exclusively until the Stop Calling Requested Substitutes deadline is reached. If a substitute has not been secured at that point, SubFinder will begin using the preference list(s) and skill list.
  - **Substitute Required**: You would like SubFinder to find a substitute for you using a preference list or the skill list.

  **NOTE**: If you are creating multiple jobs at the same time you will have to select Substitute Required, as you cannot Request or Prearrange multiple substitutes.

- **Job Status**: Depending upon the Job Type selected, SubFinder will automatically assign one of the following:
  - **Filled**: The absence is filled with an appropriate substitute. This status will be automatically applied to Prearranged Substitute absences.
  - **Unfilled**: SubFinder needs to do some work to fill the absence. This status will be automatically applied to Requested Substitute or Substitute Required absences.
  - **None**: This status applies only to No Substitute Required absences.
• **Substitute**: If the job type is prearranged substitute or requested substitute, you must tell SubFinder who will be substituting. Select the desired substitute from the list provided.

• **Special Instructions**: Special Instructions may be added as a file attachment or typed in directly as text-based. 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. Once you choose the file, click **Upload**. The file will be attached. Once uploaded, if you need to replace the file attachment, click **Replace**. To remove the file attachment, click **Remove**. If you choose to leave text-based special instructions, type them in, review them carefully, and then click **Save**. If you decide that text-based instructions are not necessary, click **Exit**.

• **Job Notes**: Job Notes are a way to record additional information regarding the absence or job. Only you and the SubFinder operator can view the job notes. They will not be included in the job for the employee or substitute to see.

When you have entered all the applicable information, click **Save Job** at the bottom of the screen.

### Reports

SubFinder offers report options, providing a number of site or site group specific reports. While all reports are available in a PDF format, a select few are also available in Excel. The reports which are available in both formats are noted below. To access the reports available within SubFinder, click on **Reports**.

Using the drop down arrow, select the report you would like to run. You can select from the following reports:

- **Absence Authorization Report**: This report provides all of an employee's absences for the specified time period along with the reason and length of each absence. It includes a space for the Employee and Principal to sign off.

- **Absence Days Report**: This report provides a listing of any employees who have been absent "X" number of days or more during a specified date range.

- **Absence Report by Activity ID**: This report prints a summary of absences by site, sorted by employee and activity ID.

- **Absence Report by Employee**: This report provides absence information sorted by employee and then absence start date. *Available in Excel format.*

- **Absence Report by Site**: This report provides absence information sorted by site and then by start date. *Available in Excel format.*

- **Absence Report by Site (Itinerant)**: This report provides absence information sorted by site and then by absence start date. It includes complete itinerant absence information. *Available in Excel format.*

- **Absence Report by Site by Employee**: This report provides absence information sorted by site, then by employee name. *Available in Excel format.*

- **Absence Report Francis Howell (line)**: This report provides a summary of absences by site, sorted by employee name, absence reason, and miscellaneous code. The report is printed in a "single line per entry" format. *Available in Excel format.*

- **Absence Summary**: This report counts and summarizes the number of employee absences based on the following job types: substitute required and no substitute required. *Available in Excel format.*
• **All Substitute Listing**: This report provides an alphabetical listing of all Substitutes, their ID number, and their phone number. You can filter this report based on their certified/classified status as well.

• **Employee Absence Analysis**: This report provides a summary of employee absences by reason and day of week. Percentages can be included for each day of the week and for each reason.

• **Employee ID**: This report includes a listing of employee names and their SubFinder-assigned ID number. Administrators will use the ID number any time they need to create an absence for one of their own employees via the phone.

• **Employee Leave Control**: This report provides a detailed accounting of employees within your site who have been set up to utilize SubFinder’s Leave Control feature. Selection criterion includes single employee, all employees, all employees by site, all employees at a single site, and all employees within a single site group. You may also choose to include all controlled reasons or a single reason.

• **Employees by Primary Job Position**: This report provides an alphabetical listing of job positions along with the employees who have had the position assigned as their primary position. If the employee has a secondary job position, it will also be included in the report.

• **Individual Substitute Jobs**: This report provides job information sorted by substitute and then by job start date. A separate page is generated for each substitute. *Available in Excel format.*

• **Individual Substitute Jobs (line)**: This report provides job information sorted by substitute and then by start date. The report will run as a continuous report, with only a new header for each new substitute. It includes less detailed information than the Individual Substitute Jobs report and is printed in a “single line per entry” format. *Available in Excel format.*

• **Itinerant Employees**: This report produces a list of itinerant employees and their schedules.

• **Job Log**: This report provides a detailed account of the actions taken to fill an absence or job. It includes any changes made to the absence or job as well as the steps SubFinder took to fill it. This report can only be created for one job at a time. Please have the job ID number available to enter as filter criteria. *Available in Excel format.*

• **Job Notes**: This report prints a listing of all jobs matching the Sort and Filter criteria with their associated Job Notes, and optionally their Substitute Notes.

• **Long Term Assignments Report**: This report provides absence information on any long-term assignments during the specified time period. Whether or not an absence or job is long-term is determined by using the long-term threshold within the SubFinder Control Panel. *Available in Excel format.*

• **No Employee Jobs Report**: This report provides job information for No Employee Jobs. *Available in Excel format.*

• **Overall Absence Analysis**: This report provides the absences for ALL sites assigned to the user or a SINGLE site assigned to the user, calculating the percentage of absences by day and by reason. *Available in Excel format.*

• **Overall Substitute Jobs**: This report provides job information sorted by substitute and then by job start date. *Available in Excel format.*

• **Overall Substitute Jobs (line)**: This report provides job information sorted by substitute and then by start date. This report will be continuous rather than using a separate page for each substitute. It will include less detailed information than the Overall Substitute Jobs report and will be printed in a “single line per entry” format. *Available in Excel format.*

• **Overall Substitute Responses**: This report provides a summary of a substitute’s activities with regard to both job shopping and calls received from SubFinder for a specified date range.

• **Preference List for Employees**: This report provides an alphabetical listing of employees at a site along with their preference list assignments.
• **Preference List for Substitutes:** This report generates a listing of preference lists at a site and the substitutes who have been assigned to those lists. You have the option of showing all preference lists or choosing only certain types – personal exclusion, site exclusion, personal permanent substitute, site permanent substitute, or regular.

• **Staffing Strength Report:** This report lists every employee that was scheduled to work for a selected site, which translates to a selected shift.

• **Substitute by Site:** This report provides an alphabetical listing of all substitutes who will work at a particular site. You can also request only those substitutes which are available to work on a specified date or date range. Available in Excel format.

• **Substitute Certifications:** This report provides an alphabetical listing of all substitutes, indicating their certifications and associated expiration dates. This report can also be used to find out whose certifications are about to expire. Available in Excel format.

• **Substitute Notes:** This report prints a listing of all jobs matching the Sort and Filter criteria with their associated Substitute Notes, and optionally their Job Notes.

• **Substitute Responses and Rejections Report:** This report provides information on substitutes that include the sites at which the substitute will work, the job positions assigned to the substitute, jobs the substitute has worked, and the total calls SubFinder made to the substitute along with the responses the substitute gave to those calls. This report provides valuable information that can be used in the defense of unemployment claims.

• **Today’s Absences:** This report provides a listing of all absences and jobs for a single day in a single line by entry format. It can be filtered by all sites, site group or single site.

• **Verification – Absence Report by Site:** This report provides absence information sorted by site and then start date. While this report will include itinerant absences, they will only be displayed for the employee’s home site. In addition to the filters available on the standard Absence Report by Site, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder’s Verification function.

• **Verification – Overall Substitute Jobs:** This report provides job information sorted by substitute and then start date. It will be continuous rather than using a separate page for each substitute. In addition to the filters available on the standard Overall Substitute Jobs report, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder’s Verification function.
After choosing the desired report, click **Select Report**.

After selecting a report, you will typically be presented with a report criteria screen. Use this screen to filter the report according to your specific needs. Most reports offer a variety of filters. If you do not want to filter the information included in the report, simply leave the boxes unchecked.

Select the filter(s) and options you wish to use to generate the report and then click **Generate Report**. You will be returned to Report Selection screen where you will see a confirmation that your report request was successfully added.

To review the status of your request, click on **Check Report Status**; a new browser window will appear with the Report Status Monitor.

The monitor screen will retain a listing of the reports you request throughout the day. This monitor screen will include pertinent information regarding your requested reports including: the report name, the date and time the request was submitted, and the report status. The status area will either display “Pending” or “Downloaded”. A pending status indicates that the report is still generating and is not ready to download. A downloaded status indicates that the report is ready to be downloaded.

Once your report is available, an alert will appear notifying you that the report is ready to download.

Click **OK** and the Report Status Monitor Screen will allow you to download the report.
To download the report, click Download located next to the report you wish to view. The report will be downloaded as an Adobe file or an Excel file that you can save to your computer or print. Use the various icons on the Adobe Viewer toolbar or Excel toolbar to print, save, and navigate through the report.

If you do not want the report to be available for review at a later time, click Delete; the report will be removed from your list.

Refresh can be used to update the Report Status Monitor screen at any time. This may be useful if you have requested a report and the status of the report is still listed as pending after a period of time.

When you are done with the Report Status Monitor window, close it using the ✗ button in the top right hand corner of the screen.
Employees

This area is used to access information for employees within your site or site group. Click on **Employee** and the following page will be displayed:

The Employee List screen contains the following components and buttons:

- **Get Employees**: By clicking this, a list of employees that match the criteria provided in the Selection Criteria section will be retrieved from the database. If no criterion is provided, all employees at the site will be listed in alphabetical order according to their last names. By using one or more of the filtering options, you can narrow your search. The filtering options include Last Name, First Name, Employee Number, PIN Number, ID Number, and Phone Number.

  Note: In the name field, you can enter the first letter or first few letters of the employee’s name to narrow the search rather than enter the employee’s entire name.

- **Selection Criteria Options**: The drop down boxes located to the left of the search criteria fields are used to further limit your search. The top drop down box contains two options, = and >=.

  Selecting >= will limit your search to finding all employees with a name, identifying number, or phone number greater than or equal to that entered in the search field. Using = in a search will provide you with all of the employees with a name, identifying number, or phone number equal to that which was entered in the selection criteria.

  The lower drop box contains one option, AND <=.

  When used in conjunction with the first drop box, AND <= can be used to limit the search to find all employees that are between two qualifying pieces of data. For example, if you wanted to pull up only those employees that have a last name beginning with the letter H through P, you would select the >= option and enter the letter H in the Last Name field. You would then select AND <=, and enter the letter Q in the lower Last Name field.

  Once you have entered the desired Selection Criteria, click **Get Employees**. SubFinder will display the matching results in the Employee List box at the bottom of the screen.

- **Add Employee**: By clicking this, you can enter the information necessary for adding a new employee.

- **Home Site**: If you are a site administrator for a single site, your site will automatically be
displayed in this field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.

- **Employees List Box**: This is the area that displays the names of the employees based on the selection criteria. You can change the number of employees displayed on each page and which page of the list you would like to view by using the drop down arrows in the upper right corner of the employee list box.

**Adding an Employee**

To add an employee, click **Add Employee**. If you have been granted permission to add employee records, the following screen will appear:

Enter the new employee’s Last Name, First Name, Middle Initial (MI), Employee Number and PIN. Select the employee’s Home Site, the Calendar Track the employee will follow, Primary Job Position, and Secondary Job Position (if applicable).

If you wish to assign the Skills List to this employee, check the box beside the **Assign Skills List** field. If a preference list or the skills list is not assigned to the employee, SubFinder will not be able to fill an absence for the employee.

**NOTE**: If you are adding an employee who is already entered in the SubFinder system as a substitute, simply enter the substitute’s Employee Number in the area below the heading **Add Employee Status to Existing Sub**. Once the number is entered, click on **Add Status**. This will create a record with the name and address fields already completed.

Once you have entered all of the required information, click **Save**. The General Info tab will appear.

**The General Info Tab**

The following fields appear on the employee’s General Info tab:

- **Status Box**: This field will show you the Employee’s Name, Employee Number, PIN, ID Number, if they are a substitute as well as an employee, and notice of expired certifications. This box will remain present as you navigate from tab to tab.

**NOTE**: If you are adding a new employee or editing an existing one, the status box will also display notification of successful updates after clicking **Save**. **Failure to Click Save after the entry of any new or modified information will result in the loss of all changes.**
- **Home Site**: If you are an administrator for a single site, this field will automatically populate with the correct information. If you are a site group administrator, you can click on the arrow at the end of the field and select the appropriate site from the list presented.

- **Calendar Track**: Click on the arrow at the end of the field and select the appropriate calendar track from the list provided.

- **Primary Job Position**: The Primary Job Position is one factor that can be used to match the employee, when absent, to an appropriate substitute. Click on the arrow at the end of the field and select the appropriate primary job position from the list provided.

- **Secondary Job Position**: To select a specific position, click on the arrow at the end of the Secondary Job Position field and select it from the list presented. SubFinder will use this secondary position in the following ways:
  - Any substitute that is displayed a job for this employee will hear both job positions.
  - If SubFinder can’t find a substitute for the Primary Job Position, and there is still time available on the morning of the absence before the job is scheduled to change to Failed to Fill, SubFinder will process the Skill List again based on the Secondary Job Position.

NOTE: Home Site, Calendar Track, Primary Job Position, and Secondary Job Position will automatically populate with the information that you entered in the initial Add Employee screen.

- **Hire Date**: What date was this employee hired by your district? Dates should be entered using the format MMDDYY. For example: June 30, 2012 would be entered 063012. Using this format, the slashes (/) will be entered automatically when you tab out of the field. You can also click on the Calendar icon to the right of this field and a calendar will appear which defaults to the current month and year. You can select the correct month, day and year from this calendar.

- **Date Added**: This is the date on which the employee was entered into SubFinder. This field will automatically be completed with the current date and is not available for editing.

- **Work Hours – Start and End**: If the employee’s normal working hours are the same as the open and close times at the employee’s home site, leave these fields blank. If this employee has working hours that differ from the open and close times for the site, enter them using the format HHMM A/P; for 7:30 a.m. you would type 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.

- **Make-up Teacher**: If this employee will serve as a make-up teacher, working during an off-track period, place a check in this box. This field is used for reporting purposes only.

- **Certified**: If this employee is considered certified, a third grade teacher for example, place a check in this box.

- **Classified**: If this employee is considered classified, a food service worker for example, place a check in this box.

- **Restricted**: Flagging the employee record as restricted will prohibit the employee from reporting any absences in SubFinder.

- **Inactive**: Flagging the employee record as inactive will prohibit the employee from reporting any absences in SubFinder. It also marks the record for deletion the next time a purge is run.
Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional employee information.

**NOTE:** If you fail to click **Save** before moving to another tab, the information you entered will be lost.

**The Name/Address Tab**

The **Last Name**, **First Name**, **MI**, **Number**, and **PIN** fields will automatically populate with the information you previously entered for this employee. If any adjustments are needed to these fields, they can be made here. This tab also allows you to enter the employee’s address, phone number, email, gender, and ethnicity.

**NOTE:** Your organization may choose to send employees email notifications regarding the status of their absences. The notifications may be sent anytime their absence is approved or disapproved, a substitute agrees to one of their jobs, anytime a substitute is cancelled out of one of their jobs, substitutes notes are added or edited or their certification is about to expire. Your central SubFinder operator will be able to tell you if they are using the email notifications feature.

Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional employee information.

**The Schedule Tab**

The Schedule tab displays the employee’s schedule, color-coded as follows:

- **White**: A normal workday for the employee.
- **Yellow**: An absence day for the employee.
- **Red**: A scheduled day off for the employee, such as a weekend or holiday.

The days off are based on the Calendar Track assigned to the employee on the General Information tab.

The screen will display two months at a time. To view previous or future months, click the arrows in the upper left or right corners of the calendars. If you click on a day that is marked as an employee absence, a grid will appear below the calendar displaying the reason for the absence along with the start and end dates and times of the absence.
The Itinerant Schedule Tab

If this employee is an itinerant employee, one who travels from site to site, you will want to record his/her schedule in SubFinder. SubFinder will use the schedule to determine which administrators should hear or see the employee’s absence on any given day. SubFinder will also show the itinerant schedule to the substitute when they are job shopping.

To add a schedule item for an itinerant employee:

1. Select the appropriate day of the week from the list presented by the drop down arrow to the right of the field.
2. Enter the start and end times that the employee works at this particular site.
3. Select the appropriate site from the list presented by the drop down arrow to the right of the field.
4. Select the appropriate job position from the list presented by clicking the drop down arrow to the right of the field.
5. Place a check in the **Add** box.
6. Click **Save**. The item you just entered will be saved and will now be displayed on the screen.
7. Repeat steps 1-5 until you have entered the employee’s schedule for the entire week. Be sure to include those portions of the schedule that occur at the employee’s assigned home site.
8. Additional functions allowed:
   a. You can change any of the information displayed on the itinerant schedule. Simply use the drop down arrows to select a different day of the week or site, job position, or change the start and end times by highlighting the current entry and input the appropriate time. Click **Save**.
   b. You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.

**NOTE:** The substitute will be able to view the employee’s schedule when job shopping via the Internet. The employee will need to voice their itinerant schedule by calling into SubFinder for substitutes to hear the details when job shopping over the phone.
**User Defined Codes Tab**

The User Defined Codes tab allows you to keep track of up to 10 additional pieces of data pertaining to the employee.

The various codes available have different character lengths:

- **User Defined Codes 1-2:** up to 32 alpha/numeric characters
- **User Defined Codes 3-5:** up to 10 alpha/numeric characters
- **User Defined Codes 6-10:** up to 6 alpha/numeric characters

Your SubFinder Operator will notify you of any User Defined Codes being used. Once you have entered the employee’s User Defined Codes, click **Save**.

**The Certification Tab**

You can use the Certification tab to enter up to eight different certifications that the employee holds, along with an expiration date for each one.

To add a certification for an employee:

1. Enter the certification name and expiration date in the appropriate fields.
2. Click on **Add** and the certification information will be placed in the Current Certifications Box.
3. Repeat steps 1 and 2 until all certifications have been entered.

Once you have added all of the certifications, click on **Save**.

Additional functions allowed:

- You can change any of the information displayed for the certification. Simply highlight the certification name or expiration date and enter the updated information. Click **Save**.
- You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.
If the employee has a certification that is expired, a notice will appear on the right hand side of the status bar alerting you of the expiration. This notification will be present upon entry into the employee’s record. You can simply click on the Certification Tab to view which certification has expired.

NOTE: The employee will be alerted of a pending or existing expiration when they attempt to contact SubFinder to report an absence or if enabled they will receive an email notification. SubFinder will not generate a separate call to notify them of this information.

The Leave Control Tab

SubFinder’s Leave Control is a powerful tool that allows your district to track employee leave and entitlements. This tool provides the following features:

- Leave can be calculated in units of either hours or days.
- Each controlled leave reason can have a unique limit.
- You have the ability to view both Leave Used and Leave Available.
- Leave can be accrued at the intervals you require – monthly, quarterly, annually, etc.
- You can roll unused leave over to the same reason or to a different reason.

To apply controls to a particular reason:

1. Select the desired reason(s) in the Available Reasons list on the left side of the Leave Control tab by checking the box under Select.

2. Click >> to transfer the reason(s) to the Assigned Reasons list on the right side of the Leave Control tab. Click Save.

3. Click on the Details hyperlink next to the transferred reason. SubFinder will display the Employee Leave Reason Details screen:

- **Reason**: If the unused balance of leave time for this reason is to be accrued from year to year, what reason should it be accrued to? To select a specific reason, click on the arrow at the end of the Reason field and select the reason from the list presented. The default reason will be the same reason for which you are applying the controls.
- **Accrual Type**: How often will you run an accrual on this reason? The available choices are: Annual, Monthly, Semi-monthly, Bi-weekly, Weekly, and Others.

- **Use Hours Not Days**: What time unit do you want to use to calculate leave for this reason? To select hours, place a check in the box below the heading. To select days, leave the box unchecked.

- **List as Selected Reason**: If this is a reason that accrues from year to year (the unused balance is to be carried over each time a manual accrual is run), check the box below this heading. When this box is checked, any unused balance shown in the Time Available field will be carried over to the reason specified under the Reason heading when a manual accrual is run for the particular Accrual Type.

- **Refuse if Limit Reached**: When the employee has used all the leave time allowed for this reason, should SubFinder refuse to accept any more absences for this reason? If the answer is yes, check the box below the heading. If the box is not checked, SubFinder will allow the employee to continue reporting absences for this reason, even when the limit has been reached.

- **Last Accrual**: This field will display the last date on which an accrual was manually run. If you have not yet run an accrual, this field will indicate when this particular reason was set up. This field is automatically completed by SubFinder and is not available for editing.

- **Allotment per Period**: How much leave time is allotted for this reason during the period specified under Accrual Type? Typically, this will be equal to the amount of leave given for the period. However, if you are setting up leave control mid-year you may need to set this to a smaller amount of time. While this field is typically not available for editing, it can be changed by using **Override**.

- **Accrual from Last Period**: SubFinder will automatically generate how much leave time was carried over from the last accrual period. This number will be generated at the time a manual accrual is performed. While this field is typically not available for editing, it can be changed by using **Override**.

- **Accumulation**: This is the total of the Allotment per Period and Accrual from the Last Period fields. While this field is typically not available for editing, it can be changed by using **Override**.

- **Time Used**: This field represents that amount of leave time that has been used for this reason since the last manual accrual was run. SubFinder will automatically keep track of this for you as absences for the employee are entered in the system. Please keep in mind that this field will include scheduled absences which have not yet occurred, i.e. future absences. While this field is typically not available for editing, it can be changed by using **Override**.

- **Time Available**: This field represents the amount of leave time still available to the employee for this reason. SubFinder will automatically keep track of this for you as absences for the employee are entered in the system. While this field is typically not available for editing, it can be changed by using **Override**.

- **Override**: **Override** is used to either change the default setting for the above five fields or to establish a value for a field where there is no default. Clicking this will provide you with the edit-access to the above five fields. After clicking **Override**, you may change any of the fields as necessary.

- **Calculate**: **Calculate** is used to recalculate the values in the Accumulation and Time Available fields whenever a change is made using **Override**. Once you click **Calculate**, the values will be recalculated and the fields will become grayed out again.

Once you have entered all the desired information on the Employee Leave Reason Details tab, click **Save**.
The Request List Tab

The Employee Request List tab displays a listing of substitutes that have been assigned to the employee’s Requested Substitute 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 Up and Down buttons to order the substitutes on the list.

If this feature is enabled and you, the employee, or SubFinder operator choose to report an absence with the job type Requested Substitute, the Use Request List checkbox will appear. When checked, SubFinder will attempt to fill the absence with the Employee’s Request List. SubFinder will call the requested substitutes exclusively until the Stop Calling Requested Substitutes deadline is reached. If a substitute has not been secured at that point, SubFinder will begin using the preference list(s) and skill list.

The Change Log Tab

The Change Log tab will show any changes made to the employee record. On the initial Change Log screen you will see a list of all changes made to the particular employee’s record, along with some Display options. The Display options will allow you to select how many log entries are displayed on a page and will give you the ability to jump through the list a page at a time. Simply use the drop down arrows to make your selection.

The information in this screen will include the date on which the change was made, the time at which it was made, the type of change made, and who made the change. To view more specific details on a particular entry, click the Details hyperlink at the right of the entry.

The Change Log Details page will give you more specific details on the selected entry. It will include the date and time the change occurred, the type of entry made, the new information, the previous information (if applicable), how the change was entered, and who made the change. When you are finished viewing the information, click Close and you will return to the previous page.
The Main List Tab

Clicking on the Main List tab will return you to the Employee List screen.

Editing an Employee

Once an employee has been added to SubFinder, you may need to make changes to the record. To edit an employee’s record, use the selection criteria as described in Adding an Employee to locate the employee name and then click on the Edit hyperlink to the left of the employee’s name. The Edit Employee screen will appear:

When you edit an employee record, all fields can be changed as necessary, depending on the rights which you were granted by your SubFinder Operator. Once you have made the desired changes on each tab, click Save before moving to another tab. For details on specific fields, please refer to the section titled Adding an Employee.

Substitutes

This area is used to access information for substitutes. Click on Substitute and the following page will be displayed:
The Substitute List screen contains the following components and buttons:

- **Get Substitutes**: By clicking this, a list of substitutes that match the criteria provided in the Selection Criteria section will be retrieved from the database. If no criterion is provided, all substitutes will be listed in alphabetical order according to their last names. By using one or more of the filtering options, you can narrow your search. The filtering options include Last Name, First Name, Number, PIN, ID, and Phone Number.

- **Selection Criteria Options**: The dropdown boxes located to the left of the search criteria fields are used to further limit your search. The top dropdown box contains two options, = and >=.

  Selecting >= will limit your search to finding all substitutes with a name, identifying number, or phone number greater than or equal to that entered in the search field. Using = in a search will provide you with all of the substitutes with a name, identifying number, or phone number equal to that which was entered in the selection criteria.

  The lower drop box contains one option, AND <=.

  When used in conjunction with the first drop box, AND <= can be used to limit the search to find all substitutes that are between two qualifying pieces of data. For example, if you wanted to pull up only those substitutes that have a last name beginning with the letter H through P, you would select the >= option and enter the letter H in the Last Name field. You would then select AND <=, and enter the letter Q in the lower Last Name field.

  Once you have entered the desired Selection Criteria, click Get Substitutes. SubFinder will display the matching results in the Substitute List box at the bottom of the screen.

- **Add Substitute**: By clicking this, you can enter the information necessary for adding a new substitute.

- **Substitutes List Box**: This is the area that displays the names of the substitutes based on the selection criteria. You can change the number of substitutes displayed on each page and which page of the list you would like to view by using the drop down arrows in the upper right corner of the substitute list box.
Adding a Substitute

To add a substitute, click on **Add Substitute**. If you have been granted permission to add substitute records, the following screen will appear:

Enter the new Substitute’s Last Name, First Name, Middle Initial, Employee Number and PIN.

**NOTE:** If you are adding a substitute who is already entered in the SubFinder system as an employee, simply enter the employee’s Employee Number in the area below the heading **Add Sub Status to Existing Employee**. Once the number is entered, click on **Add Status**. This will create a record with the Name/Address fields already populated.

Once you have entered all of the required information, click **Save**. The General Info tab will appear.

The General Info Tab

The following fields appear on the substitute’s General Information tab:

- **Status Box:** This field will show you the Substitute’s Name, Employee Number, PIN, ID Number, if they are an employee as well as a substitute, and notice of expired certifications. This box will remain present as you navigate from tab to tab.

  **NOTE:** If you are adding a new substitute or editing an existing one, the status box will also display notification of successful updates after clicking **Save**.

- **Max Days to Work:** How many days is the substitute permitted to work during the current reporting period—typically a school year? If there is no limit, leave this field blank. This can be used to prevent retired teachers from working more days than they desire or are allowed.

- **Total Days Worked:** This field is automatically updated by SubFinder and is not available for editing. It displays the total number of days the substitute has been scheduled to work, including past, present, and future jobs, as of the current date.

- **Certified Job Days:** This field is automatically updated by SubFinder and is not available for editing. It displays the total number of days the substitute has worked in job positions designated as “certified”.

- **Max Hours per Week:** How many hours is the substitute permitted to work during any given week? This may be used for a substitute who has been newly hired and is still in a “probationary” period, or for a substitute who wants to work no more than a certain number of hours per week. If there is no limit, leave this field blank.

- **Hire Date:** What date was this substitute hired by your district? Dates should be entered using the format MMDDYY. For example: June 30, 2012 would be entered 063012. Using this format, the slashes (/) will be entered automatically when you tab out of the field. You can also click on
the Calendar icon to the right of this field. A calendar will appear which defaults to the current month, day and year. You can select the correct month, day and year from this calendar.

- **Date Added:** This field is automatically completed by SubFinder and is not available for editing. It reflects the date on which the record was added into the system.

- **Certified:** Is this substitute qualified to work certified positions, a third grade teacher for example, within your district?

- **Classified:** Is this substitute qualified to work classified positions, a food service worker for example, within your district?

- **Pre-registered:** If the pre-registration feature has been enabled, this field will indicate whether or not the substitute has called into SubFinder and indicated his or her availability. As an administrator, you can manually flag (or un-flag) this field. If you are using the pre-registration feature, and adding a new substitute after the pre-registration period has ended, you must manually flag the person as pre-registered before they will receive calls from SubFinder.

- **Restricted:** Flagging a substitute as restricted tells SubFinder not to display any jobs to the substitute. The substitute will not be considered until the restriction is removed.

- **Inactive:** Flagging a substitute as inactive restricts the substitute from working and marks him/her for deletion the next time the substitute purge is run.

- **Home Site Group:** This field can be used to tie a substitute to a particular site for reporting purposes. It will not be used to limit the substitute to working only at the selected site. If the substitute serves as both an employee and a substitute within the district, this field will reflect their home site from the employee record. Typically this field will be left blank.

Once you have entered in the appropriate information, click **Save**.

**NOTE:** If you fail to click **Save** before moving to another tab, the information you entered will be lost.

### The Name and Address Tab

The **Last Name**, **First Name**, **MI**, **Number**, and **PIN** fields will automatically populate with the information you have previously entered for this substitute. If any changes need to be made to these fields, they can be made here. This tab also allows you to enter the substitute’s address, phone number, email, gender, and ethnicity.

**NOTE:** Your organization may choose to send substitutes email notifications regarding the status of their jobs. These notifications may be sent any time a substitute has been requested or prearranged for an assignment, placed in one from a permanent substitute list, an assignment their placed in has been modified, if an assignment they previously agreed to work is cancelled, their certification will expire or to remind them of future jobs they were placed in. Your central SubFinder operator will be able to tell you if they are using the email notifications feature.

Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional substitute information.
The Schedule Tab

The Schedule tab displays the substitute’s schedule, color-coded as follows:

- **Black**: The substitute is available to work at least 8 hours on the indicated day.
- **Red**: The substitute has indicated he/she is not able to work on the indicated day(s). SubFinder may still call the substitute in the evening for future jobs.
- **Yellow**: The substitute has requested a “Do Not Disturb” for at least a portion of the indicated day. SubFinder will not attempt to call the substitute for the designated period of time, but they are still able to work and can shop for jobs at their convenience.
- **Green**: The substitute is scheduled to work for at least a portion of the indicated day.
- **Pink**: The substitute has indicated that this day will always be a day off.
- **Blue**: The substitute has limited availability on the indicated day – he/she can work a portion of the day, but less than 8 hours total.
- **Aqua**: The substitute has more than one status on this day. For example, there is an Unavailable and also a Do Not Disturb scheduled for the day.

This screen will show a two-month schedule for the substitute that includes the current month and the following month. To move forward or backward one month at a time, click on the arrows located in the top corners of the displayed calendars.

You also have the ability to interact with the substitute’s schedule, making changes such as adding an Unavailable or Do Not Disturb date range:

1. Click on the desired date. That date will automatically populate the Start and End dates in the table below the calendars.
2. Use the drop down menu to select the type of record you wish to create.
3. Enter the Start and End times in the boxes provided.
4. If you want to enter a date range that spans more than one day, change the End Date to reflect the last day of the Unavailable or Do Not Disturb.
5. If the Unavailable or Do Not Disturb should follow the same times daily, place a check in the box under the Same Times Daily heading (for example, a Do Not Disturb from 6:00 AM to 8:00 AM for each day of a multiple day entry). If it should cover the entire range, leave the box under the Same Times Daily heading blank (for example the substitute is unavailable from 6:00 AM on 06/01/12 until 11:30 PM on 06/03/12).
6. Check the box under the Add heading and then click Save. The change will appear on the calendar display.
7. Repeat steps 1-6 until all entries are made.

Additional functions allowed:

- You can edit or delete a record by clicking on a date within the Unavailable or Do Not Disturb. The record will be displayed below the calendar. To edit the record, make any changes as necessary and click Save.

- You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the Delete box next to the entry and click Save.

**NOTE:** You cannot delete an Unavailable or Do Not Disturb that occurs in the past and you will only be able to edit those portions of an Unavailable or Do Not Disturb that are in the future. Any past dates will not be available for editing.

**The Sites Tab**

The Sites tab tells SubFinder which sites the substitute will or will not work at. By default, any new substitute will be set to **Will Work At All Sites**. If the substitute has some specific site preferences you can change them using the following steps:

1. Click on the drop down arrow at the end of the View field. You will be presented with an Administrator View or Substitute View.

   - If sub manage sites is enabled, this feature will allow the substitute to add sites which they've been assigned to a 'Will Not Work At' list if they no longer what to work there; subsequently they will not be considered for jobs at those sites. If enabled, substitutes will only be able to manage the sites which they have assigned by the operator (or administrator). For example if your organization has a total of thirty sites, of which a substitute is only assigned to work at ten, they will only be able to manage their choice to work at those ten sites.

2. Click on the drop down arrow at the end of the Type of List field. You will be presented with the following list:

   - **Will Work At All Sites**: The substitute has no site preferences. He/she is willing to work at any site that needs a substitute. If this option is selected, you will not be able to move sites out of the Available Sites window.

   - **Will Work Only At These Sites**: The substitute is only willing to work at certain sites. They will only receive calls for jobs at the sites listed in the Assigned Sites area. If a substitute is placed on a Preference List for a site not listed within the Assigned Sites box, SubFinder will still call them for jobs at that particular site.
• **Will Not Work At These Sites**: The substitute is not willing to work at certain sites. They will never receive a call from a site that is listed in the Assigned Sites area.

3. Select the desired option from the list.

4. If you choose **Will Work Only at These Sites** or **Will Not Work at These Sites** you must now transfer the appropriate sites from the list of Available Sites to the Assigned Sites list. To transfer sites from the left to the right, simply place checkmarks in the boxes next to the sites you wish to move and click `>>`. Click **Save**.

5. If you wish to remove a site from the Assigned Sites list check the box next to the site and click `<<`. Click **Save**.

**The Positions Tab**

The Positions tab is where you tell SubFinder what job positions the substitute is willing/able to fill.

- **Available Positions**: This is a list of all the job positions that are available to be assigned to the substitute.

- **Able to Work**: This is a list of the job positions that the substitute is willing/able to work. The substitute must have positions assigned to this list in order to be considered for jobs.

- **Skill Level**: This shows the skill level associated with each job position assigned to the Able to Work job positions list. Skill levels run from ‘A’ through ‘J’ with ‘A’ being the highest.

- **Default Skill Level**: This is the skill level that will be initially assigned to all positions transferred from the Available Positions list to the Able to Work list. If you want most of the job positions to be assigned at the ‘C’ level, change this field by highlighting the default ‘A’ and typing in ‘C’. This should be done prior to assigning any positions to the substitute.

To assign positions to a substitute, place checkmarks in the boxes next to the job positions you wish to assign. Click `>>` to move the positions to the right. If necessary, change the skill level for the transferred positions by highlighting the skill level assigned and typing in the appropriate letter – ‘A’ is the highest and ‘J’ is the lowest. When you have finished assigning positions, click **Save**.

To remove a position from the Able to Work list, simply place a checkmark in the box next to the job position and click `<<`. Click **Save**.
The Availability Tab

The Availability tab shows the substitute’s availability “as a rule” for each day.

By default, a new substitute will be available Monday through Friday for a maximum of 10 hours each day. He/she will be unavailable on Saturday and Sunday.

The availability for any day can be changed by filling in the following fields:

- **From Time**: What is the earliest time that the substitute is available to begin working on the selected day? Enter the time using the format HHMM A/P; for 8:00 a.m. you would type 0800A. Leave this field blank if there is no preference.

- **To Time**: What is the latest time the substitute is available to work until on the selected day? Enter the time using the format HHMM A/P; for 3:30 p.m. you would type 0330P. Leave this field blank if there is no preference.

- **Minimum Hours**: What is the minimum number of hours the substitute is able/willing to work on the selected day? The substitute would never see jobs that occur on this day and are less than the minimum specified. You may enter a value from 0 to 24. Leave this field blank if there is no preference.

- **Maximum Hours**: What is the maximum number of hours that the substitute is able to work on the selected day? The substitute would never see jobs that occur on this day and are more than the maximum specified. If the substitute is not available to work on a certain day, enter 0. You may enter a value from 0 to 24. The default for this field is 10.

Once you have entered the substitute’s availability for the entire week, click **Save**.

The User Defined Codes Tab

The User Defined Codes tab allows you to keep track of up to 10 additional pieces of data pertaining to the substitute.

The various codes available have different character lengths:
User Defined Codes 1-2: up to 32 alpha/numeric characters
User Defined Codes 3-5: up to 10 alpha/numeric characters
User Defined Codes 6-10: up to 6 alpha/numeric characters

Your SubFinder Operator will notify you of any User Defined Codes being used. Once you have entered the substitute’s User Defined Codes, click Save.

The Certification Tab

You can use the Certification tab to enter up to eight different certifications that the substitute holds, along with an expiration date for each one.

To add a certification for a substitute:

1. Enter the certification name and expiration date in the appropriate fields.
2. Click on Add and the certification information will be placed in the Current Certifications Box.
3. Repeat steps 1 and 2 until all certifications have been entered.
4. Once you have added all of the certifications, click on Save.

Additional functions allowed:

- You can change any of the information displayed for the certification. Simply highlight the certification name or expiration date and enter the updated information. Click Save.
- You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the Delete box next to the entry and click Save.

If the substitute has a certification that is expired, a notice will appear on the right hand side of the status bar alerting you of the expiration. This notification will be present upon entry into the substitute’s record. You can simply click on the Certification Tab to view which certification has expired.

NOTE: If a substitute has an expired certification, SubFinder will not present them with any jobs until the date field is changed to a future date. The substitute will be alerted of a pending or existing expiration when they attempt to contact SubFinder to “job shop”. SubFinder will not generate a separate call to notify them of this information.
**The Disqualification Tab**

If your district has enabled the Substitute Disqualification feature, the Disqualification tab will indicate how many of each of the “disqualifying” events a substitute has accrued during today’s morning and evening calling periods.

![Disqualification Tab Screenshot]

Each potential disqualifier has four values beside it – **Morning Count**, **Morning Maximum**, **Evening Count** and **Evening Maximum**. The **Count** columns show how many times an event has occurred. The **Maximum** columns show how many times an event is allowed to occur before the substitute will not receive any more calls from SubFinder for that calling period.

Once the value in the count column reaches the value in the Maximum column for any single event, the substitute is disqualified. If you would like to re-qualify the substitute for any reason during the current calling period, simply click **Reset Count**. The values in the Count column will be removed and the substitute will be eligible to receive additional calls from SubFinder. If you do nothing, SubFinder will automatically reset all counts before the next call out period begins.

The values in the Maximum columns are set up within the SubFinder system and cannot be changed on this screen.

If your district has set up different Configuration Profiles in the SubFinder system, you can view the disqualification values for each profile. Simply click on the drop down box at the end of the Configuration Profile field and select the profile you wish to view. The disqualification values for that profile will appear in the table.

**The Change Log Tab**

The Change Log tab will show any changes made to the substitute record. On the initial Change Log screen you will see a list of all changes made to the particular substitute’s record, along with some Display options. The Display options will allow you to select how many log entries are displayed on a page and will give you the ability to jump through the list a page at a time. Simply use the drop down arrows to make your selection.

![Change Log Tab Screenshot]

The information in this screen will include the date on which the change was made, the time at which it was made, the type of change made, and who made the change. To view more specific details on a particular entry, click the **Details** hyperlink at the right of the entry.
The Change Log Details page will give you more specific details on the selected entry. It will include the date and time the change occurred, the type of entry made, the new information, the previous information (if applicable), how the change was entered, and who made the change. When you are finished viewing the information, click **Close** and you will return to the previous page.

**The Main List Tab**

Clicking on the Main List tab will return you to the initial Substitute List screen.

**Editing a Substitute**

Once a substitute has been added to SubFinder, you may need to make changes to the record. To edit a substitute’s record, use the selection criteria as described in **Adding a Substitute** to locate the substitute and then click on the **Edit** hyperlink to the left of the substitute’s name. The Edit Substitute screen will appear.

When you edit a substitute record, all fields can be changed as necessary, depending on the rights which you were granted by your SubFinder Operator. Once you have made the desired changes on each tab, click **Save** before moving to another tab. For details on specific fields, please refer to the section titled **Adding a Substitute**.
Preference Lists

Preference Lists are an integral part of the SubFinder system. Their primary use is to ensure that your best substitutes will get the first calls for open jobs. Simply stated, they are lists that specify which substitutes should, and in some cases should not, be called to fill a particular employee’s absence.

Click on Preference List and the following screen will appear.

There are three basic types of preference lists that you may want to use:

1. **Personal Preference List**: This list would typically be applied to a single employee. It is a list of substitutes, usually specified by the employee, which they have had positive experiences with in the past.

2. **Subject-Based Preference List**: This list would typically be applied to a group of employees who have the same job position. It is a list of substitutes who are considered to be above average in a particular subject area or position. For example: You may create a preference list to be used for all Boys PE teachers.

3. **Site-Based Preference List**: This list would be applied to all employees at a particular site. It is a list of substitutes who are capable of filling in for any employee within the building. You must be very careful using a site-based list since preference lists do not take job position into consideration.

**Adding a Preference List**

To add a preference list, first choose the appropriate site from the drop down list and then click Add Preference List. The following screen will appear.

- **List Name**: What do you want to call the list? We suggest using a descriptive name that will indicate the purpose of the list. For example:
  - **Regular Lists**: English PL (a position-based preference list), Smith, J PPL (an employee’s personal preference list), Rocky Hills Elem. SPL (a site-based preference list).
  - **Personal Exclusion Lists**: Smith, J PEL (an employee’s personal exclusion list), Secretarial EL (a position-based exclusion list).
  - **Personal Permanent Sub List**: Smith, J PPS (an employee’s personal permanent sub list).
  - **Site Exclusion List**: Rocky Hills SEL (a site-based exclusion list).
- **Site Permanent Sub List**: Rocky Hills SPS (a site-based permanent sub list).

- **List Type**: What type of list are you creating? You can choose from six different list types:
  - **Personal Exclusion List**: This is a list of substitutes who are to be excluded from filling a particular absence. These lists can be employee-based (substitutes who should not be called for a particular employee) or position-based (substitutes who should not be called for any employee that works in a particular position). You can create as many Personal Exclusion Lists at a site as necessary. This list must be assigned to the individual employee(s).
  - **Personal Permanent Sub List**: This is a list of substitutes who will always fill in for a particular absence. These lists can be employee-based (substitutes who will fill in for a particular employee) or position-based (substitutes who will fill in for a particular position). You can create as many Personal Permanent Sub Lists at a site as necessary. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created for the employee(s) on any given day, as long as the employee has not Requested or Prearranged someone else. This list must be assigned to the individual employee(s).
  - **Regular List**: This is a list of substitutes who should be called for a particular absence. These lists can be employee-based (substitutes who will fill in for a particular employee), position-based (substitutes who will fill in for a particular position), or site-based (substitutes who will fill in for any absence at the site). You can create as many Regular Lists at a site as necessary. This list must be assigned to the individual employee(s).
  - **Site Exclusion List**: This is a list of substitutes who are to be excluded from an entire site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. You can only create one Site Exclusion List per site.
  - **Site Permanent Sub List**: This is a list of substitutes who will always fill in for any employee at the site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created at the site, when a substitute has not already been Requested or Prearranged, on any given day. You can only create one Site Permanent Sub List per site.
  - **Alternate Site Permanent Sub List**: This is a second list of substitutes who will always fill in for any employee at the site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. It will be used after the Site Permanent Sub List. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created at the site, when a substitute has not already been Requested or Prearranged, on any given day. You can only create one Alternate Site Permanent Sub List per site.

Once you have entered the List Name and List Type, click **Save**. The Assign Subs screen will appear.
The Assign Subs Tab

Select those substitutes that you wish to include on the list by placing a check in the box beside their names in the Available Subs list. Once you have made your selection, click >> to move the substitutes to the Assigned Subs list.

If you add a substitute to the list by mistake, simply place a check in the box next to his/her name and click <<. The name will be transferred back to the available subs list.

If the substitutes are not in the desired calling order within the Assigned Subs list, you can move them by placing a check in the box next to their names and clicking Up or Down to change their position in the list. Clicking Clear will remove any check marks within the Select column.

Once you are satisfied with the list of assigned substitutes, click Save.

The Assign Employees Tab

To which employees would you like this preference list assigned? To assign the list to a specific employee, place a check in the box beside the employee name in the Available Employees list and click >>. The employee will be moved to the Assigned Employees list. If an employee was accidentally moved to the Assigned Employees list or if you wish to remove an employee from the list, place a check in the box beside the employee’s name and click <<. This will remove the employee from the list.

Once you are satisfied with the list of assigned employees, click Save.

NOTE: When assigning Preference Lists to employees, the list is automatically placed at the end of the Employee’s Preference List Rank. Please refer to the Rank List Tab section for instructions on how to order Preference Lists.
Rank List Tab

Once you have assigned the lists, you must place them in the proper order. The order of the assigned lists is very important; since SubFinder will call through them in the order they are assigned. Click on the Rank List Tab. If the lists are not in the desired order, place a check next to the list you would like to move and click **Up** or **Down** until the list is in its proper place. Clicking **Clear** will remove any checkmarks. Once all lists are in the correct order, click **Save**.

**NOTE:** If you created a Site Exclusion list or a Site Permanent Sub list for this site, they will not appear on this screen. They are automatically assigned to all employees at the site and are not available for assignment or ranking.

Copy List Tab

The Copy List tab will allow you to copy the selected Preference List to other sites within your site group. This can be very useful when creating subject-based lists that might apply to additional sites. Simply place a check in the box next to the site(s) to which you wish to copy the list and click **Copy**. Please keep in mind that you will still need to assign the list to the appropriate employees once it has been copied.

**NOTE:** If you are a single site administrator, you will not be able to copy a preference list to another site. The Selected Sites box will contain a message stating “No sites available.”

Edit Name Tab

The Edit Name tab will allow you to change the preference list name. Simply make the change and click **Save**.

The Delete List Tab

You can delete a preference list from the Delete List tab. To delete the list, click **Delete**. The list will be deleted and you will be returned to the Main List.
**Site Message**

The Site Message can be used to convey important information or announcements to your employees. To enter a message for your employees, click **Site Message**.

If you are a site administrator for a single site, your site will automatically be displayed in the **Enter Site Message for** field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.

Use the text-entry box to create the message. By default, text entered here will be displayed as simple text to your employees. However, if you are familiar with basic HTML tags, they can be used to apply different types of formatting such as line breaks, paragraph returns, bolding, and centering.

Once your message is complete, click **Save**.

**Site Directions**

Site Directions are used to provide location information to your substitutes. To enter directions to your site(s), click **Site Directions**.

If you are a site administrator for a single site, your site will automatically be displayed in the **Enter Site Directions for** field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.

Use the text-entry box to create the directions. By default, text entered here will be displayed as simple text to your substitutes. However, if you are familiar with basic HTML tags, they can be used to apply different types of formatting such as line breaks, paragraph returns, and bolding.

Once your directions are complete, click **Save**.

**NOTE:** If creating a link to Google maps your substitutes will be provided with a map and when clicked can be given the option to enter their address for directions.
Verification

Before the absences and jobs in SubFinder are submitted to payroll, they may require verification. If your district is using the Verification feature, all absences and jobs must be verified before they can be exported to your payroll system.

Click on Verification and the following screen will appear:

The Verification screen contains the following components and buttons:

- **Pay Period**: Allows you to select the appropriate pay period for which jobs must be verified. Entries for the selected pay period will appear in the Job List at the bottom of the screen.

- **Current Pay Period Verification Status**: This will display the status of the currently selected pay period. The status will either be listed as Complete or Incomplete.

- **Prior Pay Period Verification Status**: This will display the status of the pay period prior to the currently selected pay period. The status will either be listed as Complete or Verification Required.

- **Job Display**: Allows you to determine what information will be displayed in the Job List at the bottom of the screen. You may choose Substitute and Employee (shows both the substitute and employee names), Employee (shows the employee name but not the substitute name), or Substitute (shows the substitute name but not the employee name).

- **Selection Criteria**: You may use these items to refine the list of jobs that appear in the Job List at the bottom of the screen. To use a selection criteria, place a check in the box to the left of the criteria and then fill in the appropriate information.
  - **ID**: By selecting this option and entering a “first ID” and “last ID”, you can specify the job ID range that will be covered in the Job List display. Note: The display will not include any jobs that fall within the ID range but do not fall within the Pay Period selected at the top of the screen.
  
  - **Date**: By selecting this option and entering a “first date” and “last date”, you can specify the period that will be covered in the Job List display. You can either enter a specific date or date range manually in a MMDDYY format or use the calendar feature to select the dates. For example: June 30, 2012 would be entered 063012. Note: The date range must fall within the Pay Period selected at the top of the screen.
Site: If your district has set you up as a site group administrator, you will be able to select
the site for which you would like to verify jobs from the dropdown box provided. If you
have been set up as a single site administrator, you will only see the site you have been
assigned.

Employee: You may choose to display only those jobs associated with a particular
employee.

Substitute: You may choose to display only those jobs filled by a particular substitute.

Process Status: By selecting this option, only those jobs that match the specified status
will be displayed.

- Not Processed: All jobs will start with this status. It indicates that the job has not
  been processed by the Data Exchange export program.
- Processed: This indicates that the job has been exported by the Data Exchange
  program.
- Post-Modified Processed: This indicates that the job was modified after being
  verified and then exported by the Data Exchange program. Since the information
  has already been sent to Payroll, these jobs typically require special handling.

Verify Status: By selecting this option, only those jobs that match the specified status
will be displayed.

- Unverified: All jobs will start with this status. It indicates that the job has not
  been verified. In the Job List, this status will be represented by the letter U.
- Verified, Approved: This indicates that the job has been reviewed by either the
  system operator or the site administrator and the information is correct. Once
  approved, the data is available for export by the Data Exchange program. In the
  Job List, this status will be represented by the letter A.
- Verified, Disapproved: This indicates that the job has been reviewed by either
  the system operator or the site administrator and the information is incorrect.
  Jobs with a status of Verified, Disapproved are not available for export by the
  Data Exchange program. In the Job List, this status will be represented by the
  letter D.

Order By: Use this to select how the jobs will be ordered. Choose either Date or ID.

Once you have made your selections from the Selection Criteria, click Run Request. SubFinder will
display the jobs that match your selected criteria in the Job List display.

Verifying Jobs

Depending on your permissions, you may be able to verify jobs from within the grid using the checkboxes.
You may also click the Edit hyperlink to the left of the job ID to verify individual jobs.

Use the checkbox in the blue bar to select all
records listed within the grid.

Once you have selected all jobs you wish to
update click on the appropriate approval
option below the job list and click Apply.
If verifying individual jobs using the hyperlink the following screen will appear:

The main purpose of this screen is to indicate the verification status of the job. However, this screen can also be used to make changes to the job, including the absence time (employee information), job time (substitute information), site, employee, position, reason, substitute, account code and personal budget code.

- **Employee Information:** If you are verifying a job which is the result of an employee’s absence, this field will display the specific date and times of the absence. You may edit the absence start and end times if necessary.

- **Substitute Information:** If a substitute was required for the absence or if you are verifying a no-employee job, this field will display the substitute job date and times. You may edit the job start and end times if necessary. **If your district is** using the time adjustment feature within SubFinder, the correct adjustment time will also display in this field. You may edit this field if necessary.

- **Verification Information:**
  - **Verify, Approved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is correct. Once approved, the data is available for export by the Data Exchange program.
  - **Verify, Disapproved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is incorrect. Jobs with a status of Verify, Disapproved are **not** available for export by the Data Exchange or Data Exchange Pro programs.
  - **Unverify:** Indicates that the job has not been verified.
  - **Verified Date:** This field will display the date on which the absence/job was verified by the SubFinder Operator or site/site group administrator.
  - **Status:** Under normal circumstances, this field will display a status of either processed or not processed. If the record has been processed the absence and job data has been exported for payroll using either Data Exchange or Data Exchange Pro. If the status reads not processed, the data has not been exported for payroll.

- **Site:** This field displays the site at which the absence and/or job occurred.

- **Employee:** If there is an employee absence, the employee’s name will appear in this field.

- **Position:** This field contains the absent employee’s primary job position as indicated in the employee’s individual record. If this is a no-employee job, the job position selected in creating the job will appear instead.

- **Reason:** The reason selected for the particular absence or job is listed in this field.

- **Substitute:** If a substitute was required for an employee absence or filled a no-employee job, the substitute’s name will appear in this field.

- **No Substitute:** You can use this to remove the substitute from the job, or the particular day of a multiple-day job.

- **Account Code:** If a miscellaneous code was entered at the time the absence/job was created, it will appear in this field. The Account Code field does not accept manually entered miscellaneous
codes; one must be chosen from the dropdown list. **NOTE:** This field may not appear on your screen.

- **Personal Budget Code:** If the absent employee has a specific budget code entered in their personal budget code User Defined field, the code will display in this field and will also be included in the Verification Export. **NOTE:** This field may not appear on your screen.

**To verify the job:**

1. Indicate the verification status (Verify, Approved or Verify, Disapproved) by clicking on the appropriate radio button within the Verification Information box. **Verify, Approved** means that the information is correct and can be exported to Payroll by the Data Exchange program. **Verify, Disapproved** means that the information is incorrect and cannot be exported to Payroll by the Data Exchange program.

2. If you have not already done so, and if available, select the appropriate Account Code by clicking on the arrow at the end of the account code field and choosing one from the list presented.

3. Click **Save**. SubFinder will save the record and return you to the Verification screen.

**Viewing the Verification Log**

Each time a job record is verified, a Verification Log is created to record the activity that occurs. The Verification Log contains major activity that occurs throughout the verification process.

The Verification Log can be accessed from the Verification Job List display. Within the job list, find the job you wish to verify and click the **Log** hyperlink to the right of the job. SubFinder will display the following screen:

To see more detail about a particular log entry, click the **Details** hyperlink to the right of the entry. The Job Verification Log Detail screen will appear:

The Job Verification Log Detail screen will give you more specific details on the selected entry. The information may include (if applicable) a message, old and new information, and who completed the transaction.

When you are finished viewing the information, click **Close** and you will be returned to the previous screen. Then click **Back** located just above the Job Verification Log box and you will return to the initial Job List.
Log Out

When you are ready to leave SubFinder, click **Log Out**. You will be returned to the SubFinder Log In screen.
**SubFinder Phone Instructions**

You can call SubFinder to review, create and cancel absences and jobs, and to modify preference lists.

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 Review Today's Absences: Press 1
- To Review Future Absences: Press 2
- To Create an Absence: Press 3
- To Review or Cancel an Absence: Press 4
- To Create One or More Jobs: Press 5
- To Modify Preference Lists: Press 6
- To Review the Current Message: Press 7
- To Report a Substitute’s Absence: Press 8
- To Leave the SubFinder System: Press 9

**Review Today’s absence**

1. Press 1 to Review Today’s Absences.
2. If you are a site group admin you will be required to enter the site ID number of the site you want to review absences.
3. Choose which kind of absences you wish to hear: unfilled, failed to fill or filled absences.

**Review Future absence**

2. Enter the date range for the future absences you wish to review.
3. If you are a site group admin you will be required to enter the site ID number of the site you want to review absences.

**Create an Absence**

1. Press 3 to Create an Absence.
2. Enter the SubFinder-assigned ID # of the absent employee.
3. 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.
4. If enabled, you will be provided with a prompt to voice the grade level if one is not already recorded.
5. Enter the reason for the absence. SubFinder will play a list of absence reasons.
6. Select whether a substitute is required for the absence.
7. If a substitute is required, choose to have SubFinder select a substitute, prearrange a substitute or request a specific substitute. If prearranging or requesting a substitute enter the substitute’s SubFinder assigned ID #.
8. If special instructions are required you may choose to record a short message. When finished SubFinder will repeat your message.
9. Get the job number. SubFinder will provide you with a Job Number.
To Review or Cancel an Absence

1. Press 4 to Review or Cancel an Absence.
2. Enter the job number.
3. SubFinder will play the absence along with the option to cancel the absence.

To Create One or More Jobs

1. Press 5 to Create One or More Jobs.
2. If you are a site group admin you will be required to enter the site ID number where the job will be created for.
3. Enter the job position number.
4. Enter the job start/end dates and times. Specify if the job is for all day today, all day the next work day or enter specific dates and times.
5. Enter the reason for the job. SubFinder will play a list of reasons.
6. Choose to have SubFinder select a substitute, prearrange a substitute or request a specific substitute. If 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. Get the job number. SubFinder will provide you with a Job Number.

To Modify a Preference List

1. Press 6 to Modify a Preference List.
2. If you are a site group admin you will be required to enter the site ID number for the preference list you wish to modify.
3. Enter the number of the list you wish to modify.
4. Choose to add or remove a substitute from the list.
5. Enter the SubFinder-assigned ID # of the substitute you want to add or remove.

To Review the Current Message

1. Press 7 to Review the Current Message.
2. SubFinder will play your site message that is heard by all employees within your site or site group when they call SubFinder.
3. You will have the option to record a new message if one does not exist.

To Report an Absence for a Substitute

5. Enter the job number.
6. Enter the start/end dates and times of the substitute's absence.
7. Enter the reason for the absence. SubFinder will play a list of absence reasons.
8. Get the revised job numbers.