

Substitute Management System (SMAP)

Educational Assistants Instructions

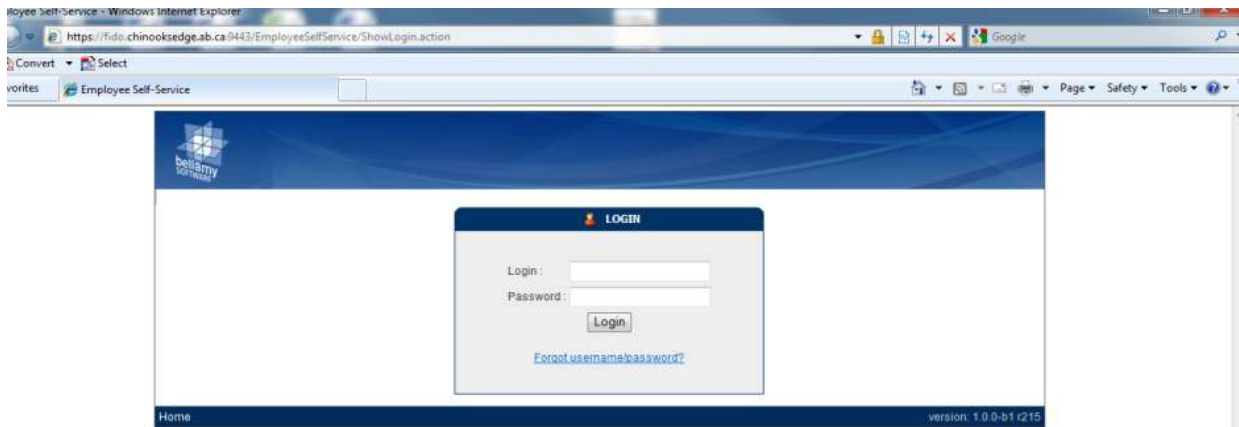
Chinook's Edge School Division No. 73
Updated January 2017



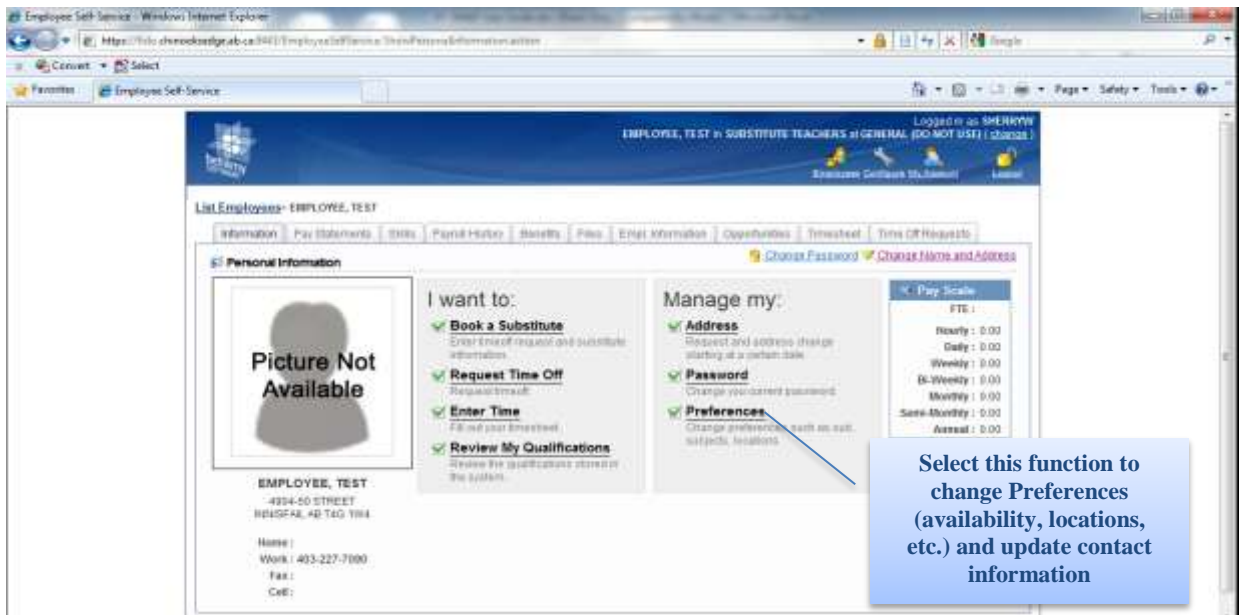
SUBSTITUTE MANAGEMENT SYSTEM

Once People Services has received all your paperwork and payroll has set you up in our system, you will receive an email from Bellamy with a link directing you to the Substitute Management System, please be sure to check your spam/junk mail for this email. Follow these login steps:

- Log onto our website: www.cesd73.ca
- Click on Staff and under the staff menu – Click on Substitute Management
- You will need to confirm your birthdate and set up your password on the first login or click on link within the email to be directed to the login screen



THE SUBSTITUTE EA'S DASHBOARD



From the Substitute EA's Dashboard in Employee Self Service, the employee can view and update their Preferences to be used by the Sub Management System. This is also where you can update your home address and phone numbers. You can also select the Paystubs/T4s tab to view your payroll history.

EDIT SUBSTITUTE PREFERENCES

Select the Preferences option from the Substitute Dashboard.

The screenshot shows the 'Substitute Preference' dashboard. At the top, there are navigation tabs: Information, Pay Stubs/T4s, Education/Certificates, Payroll History, Benefits, Files, Empl. Information, Opportunities, and Timesheet. Below these is a 'Time Off Requests' section. The main area is titled 'Substitute Preference' and contains several sections:

- Subject Experience (Edit)**: A table with one row containing 'Educational Assistant'.
- Grade Preference (Edit)**: A section stating 'No preferred Grades!'.
- School Preference (Edit)**: A table with two columns and two rows:

INNISFAIL CAREER HIGH	INNISFAIL MIDDLE
INNISFAIL JUNIOR SENIOR HIGH	ECOLE JOHN WILSON ELEMENTARY
- Availability (Edit)**: A table with columns for Weekday, Morning, Afternoon, and Evening, and rows for each day of the week. Green checkmarks are present in the Morning, Afternoon, and Evening columns for Monday through Friday.

Weekday	Morning	Afternoon	Evening
Monday	✓	✓	✓
Tuesday	✓	✓	✓
Wednesday	✓	✓	✓
Thursday	✓	✓	✓
Friday	✓	✓	✓
Saturday			
Sunday			

On the right side, there is a 'Substitute Status' section with a dropdown menu set to 'Active'. Below it is a section titled 'Who has me listed as their preferred sub' with the text 'No people found!'. A callout box points to the 'Active' dropdown with the text: 'Substitute Status: This substitute is active and will appear on the "active sub list". To inactivate your status, press this button. Press it again, to activate.'

Another callout box points to the 'Contact Management' link at the top with the text: 'Contact Management: Select this function from "Preferences" to maintain contact information'.

A third callout box points to the 'Preferences' link on the left with the text: 'Preferences: Maintain each of the preferences by selecting the "Edit" button. Preferences are self-managed and can be changed at anytime'.

A fourth callout box points to the 'All Schools' selection in the 'Availability' section with the text: '**At this time the All Schools selection is not operable, please do not use this option when picking schools**'.

At the bottom of the dashboard, there is a footer with 'Home', '©2016 - Serenic Software, a division of Sylogist Ltd.', and 'Version: 8.0.3969.4'.

Preferences

Preferences are used by the system to automatically search qualified subs when specific criteria is entered on the absence. When the user books the substitute using this tool, substitutes that are most qualified for the opportunity will be listed at the top for selection. Subs who have not indicated their desire to work in the location of the absent EA will not be included in any automatic search or list for that absence.

Select the **Edit** button to maintain each of the preferences. If you have not selected Availability your name will not show in the dropdown list of subs when the EA is wanting to book you. Preferences are self-managed and can be updated at any time.

Substitute Status

Only "Active" subs will be contacted by the system when searching for a qualified replacement. Turn this status to "Inactive" to avoid being called to sub. Turn the status to "Active" when you are able to receive phone calls. This status does not affect the employment status in the Payroll system.

You can also use the **Request Time Off** option located on the Information Tab to indicate date you are unavailable to sub.

Preferred Sub

Educational Assistants have the option to select up to 3 Preferred Substitutes. The Preferred Substitutes are called first for these EA sub requests.

CONTACTING THE SUBSTITUTE

Contact Management is used to manage how the automated booking system will contact the substitute. To maintain the Substitute's contact information, select **Contact Management** in **Preferences**. *Please note that at this time we are only using the phone option.*

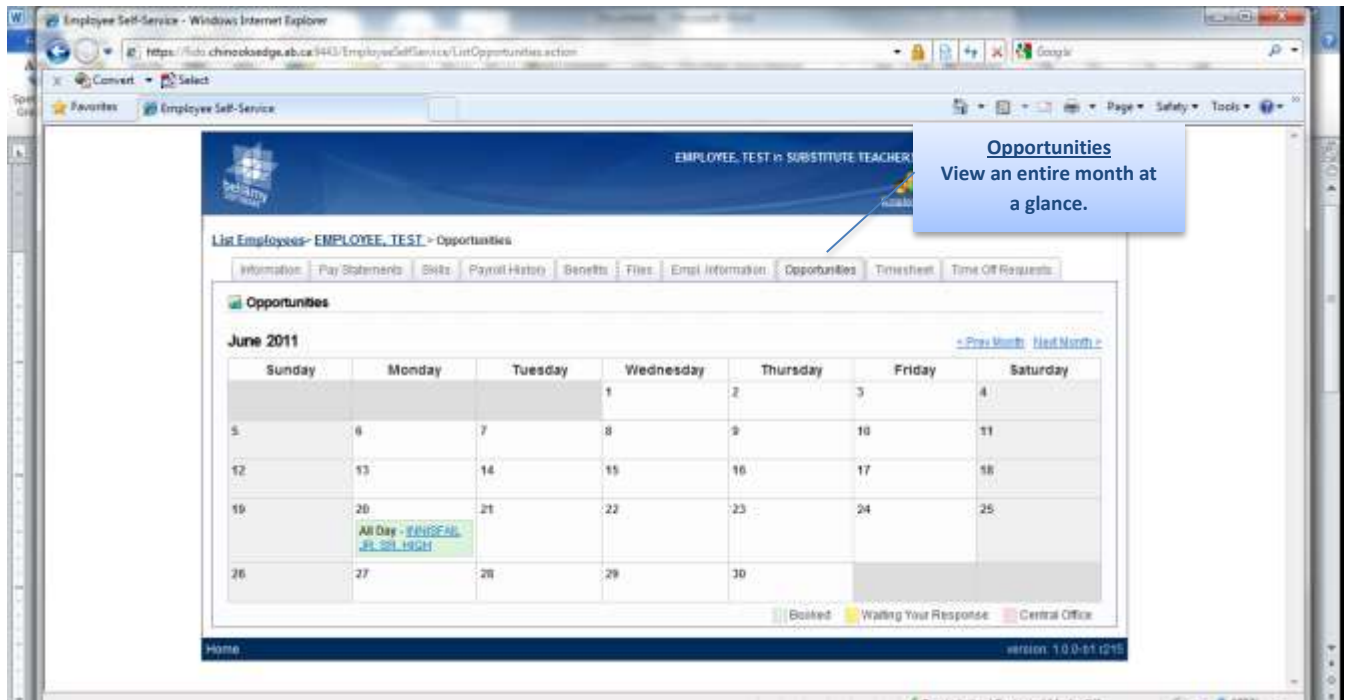
The screenshot displays the 'Manage Preferences' interface for 'EMPLOYEE, TEST'. At the top, the user is logged in as 'SHERRYW'. The page has a navigation bar with tabs: Information, Pay Statements, Skills, Payroll History, Benefits, Files, Empl. Information, Opportunities, Timesheet, and Time Off Requests. Below this, there are two sub-tabs: 'Substitute Preference' and 'Contact Management'. A callout box points to the 'Contact Management' tab with the text: 'Contact Management Select this function from "Preferences" to maintain contact information'. Under 'Substitute Contact Options EMPLOYEE, TEST', there are three options: 'Email' (unchecked), 'SMS' (unchecked), and 'Phone' (checked). A second callout box points to the 'Phone' checkbox with the text: 'Phone Only At this time, we are only using this option – please ensure that your contact phone number is correct and click save'. Below these options is the 'Contact Default' section, which includes fields for 'Email Address', 'SMS Phone Number', and 'Contact Phone Number'. The 'Contact Phone Number' field contains '403-358-8456'. At the bottom of the form are 'Save Changes' and 'Reset' buttons. The footer of the page shows 'Home' on the left and 'version: 1.0.0-b1 r215' on the right.

When a substitute EA receives an invitation to sub via the phone, the call display number will be as follows: (403) 227-7090.

You are now able to accept or decline by choosing one of the options provided. Please be sure to check your **Opportunities** tab to ensure that what you accepted went through for what you have responded to on your phone and for any notes from the EA/school.

CHECKING YOUR OPPORTUNITIES BOOKINGS

After you have been contacted via telephone and accepted a subbing opportunity you can view your entire month at a glance by accessing the ***Opportunities*** tab within Employee Self Service. Double clicking on the opportunity will show you details of your booking.



If you are unable to make your subbing date it is your responsibility to contact the school so they can rebook their sub date.

If you have to cancel a sub date the day before, the morning of or in the case of an emergency, please contact Jennifer Schneider (403)227-7052 or (403)227-7090 or email peopleservices@cesd73.ca.

How Long Does the System Wait for a Response from a Substitute?

At this time we are only using the call option and the system does not wait. If the system reaches a voice mail/answering machine it will automatically move to the next available substitute on the list.

Please ensure that the telephone/cell on your ESS profile number is the main number that you wish to be contacted at.

SUBSTITUTE EA EMPLOYEE SELF SERVICE AND FAQ

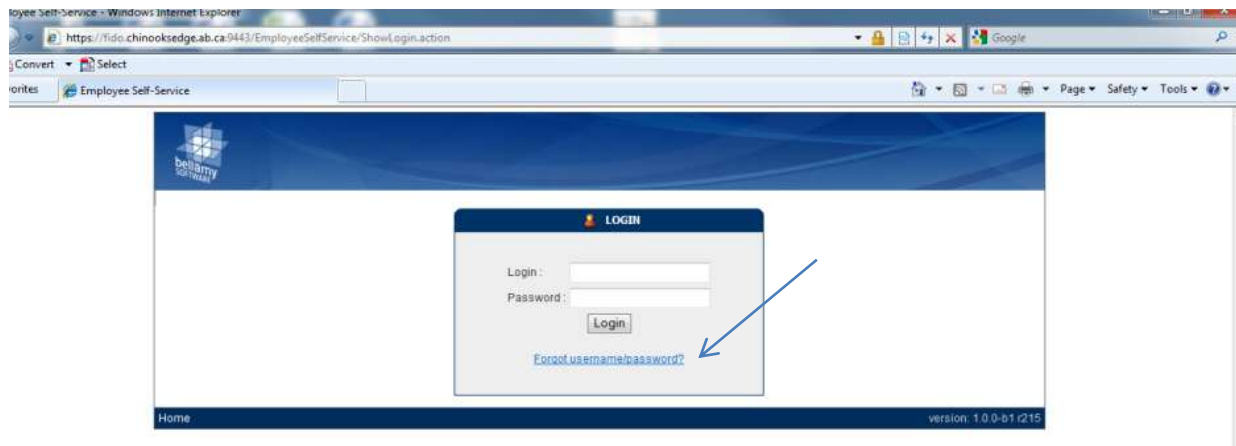
1. What if I forgot my Login or password?

Log onto our website: www.cesd73.ca

Click on Staff

Click on **Substitute Management or Employee Self Service**

Click *Forgot username/password?*



2. If a request was made to me and it does not appear in my Opportunities, what do I do?

If you had accepted an opportunity to sub and it appears on your calendar, and then it has disappeared, the EA/school support may have deleted the entry because they no longer require a sub for that date. They should have however contacted you by phone to let you know of the deletion. Be sure to check your calendar before going out to the schools.

Please Note: We currently do not use ESS system to pay substitute EA's therefore if the school contacts you directly it will not show up on your Opportunities calendar.

3. If I can't make it to a subbing position that I have agreed to, what do I do?

You must contact the EA or the school letting them know that you can no longer sub for that date, so a substitute can be rebooked.

If you have to cancel a sub date the day before, the morning of or in the case of an emergency, please contact Jennifer Schneider (403)227-7052 or (403)227-7090 or email peopleservices@cesd73.ca. I will get your message and rebook a substitute.

4. I have changed my phone number and/or address in ESS, have logged out and then have gone back in only to find nothing has been changed, what do I do?

With our system, when you make an address change, it is a 24 hour turnover, please do not re-enter this information. It will only take longer for the information to be changed.

5. If a particular school has asked me to sub, and I have confirmed with the school, but when they log into ESS my name is not in the dropdown of subs names, what do I do?

It is possible that you have not selected the school or the availability in your Preferences. refer to page 3: Edit Substitute Preferences to update your information.

6. How do I make myself unavailable if I am away?

- click on *Time Off Request* on the *Information* Tab
- click on *Add New Entry*
- click on reason code and chose *not available to work* and then click on Next
- using the calendar choose the dates you are unavailable to work and choose am, pm or All Day
- then click on finish

This tells the call out system not to call you for subbing positions on the dates chosen. You may also choose to Inactivate your account under Preferences for extended periods of time.

7. How do I fill out my timesheet? Do I need one for each School?

A timesheet needs to be completed for each school you work at in a month, please complete the timesheet and leave it at the school with the Administrative Support. They will submit it into payroll at the end of the month for you. Substitute EA's are paid on the 10th of the following month.

The Substitute EA timesheets can be found on the Chinooks Edge website www.cesd73.ca under Services then click on Employee.

8. Do I have to reapply every school year as a substitute EA?

You do not have to apply each school year. Substitute EA's are not removed you from the substitute EA list unless you provide a written/email request to be removed or if you have not worked in over 2 years or at the discretion of the Division.

9. When will I receive my Employee Self Service Sign in information?

Please allow payroll 3 business days to get you set up in the Substitute Management System. Ensure to check your spam/junk mail folder for the email.