Kalispell Public Schools
SmartFind Express

Employee User Guide: for Attendance and Requesting a Substitute

Table of Contents

Page 3..... Logging into SmartFind Express

Page 3..... KPS Employee Center

Page 4..... Employee Access Center

Page 4..... User Name and Password

Page 5..... Employee Info and Tax Info

Page 6..... Absence Entry (Smartfind)

Page 7..... Create an Absence

Page 10..... Review/Modify/Cancel Absences

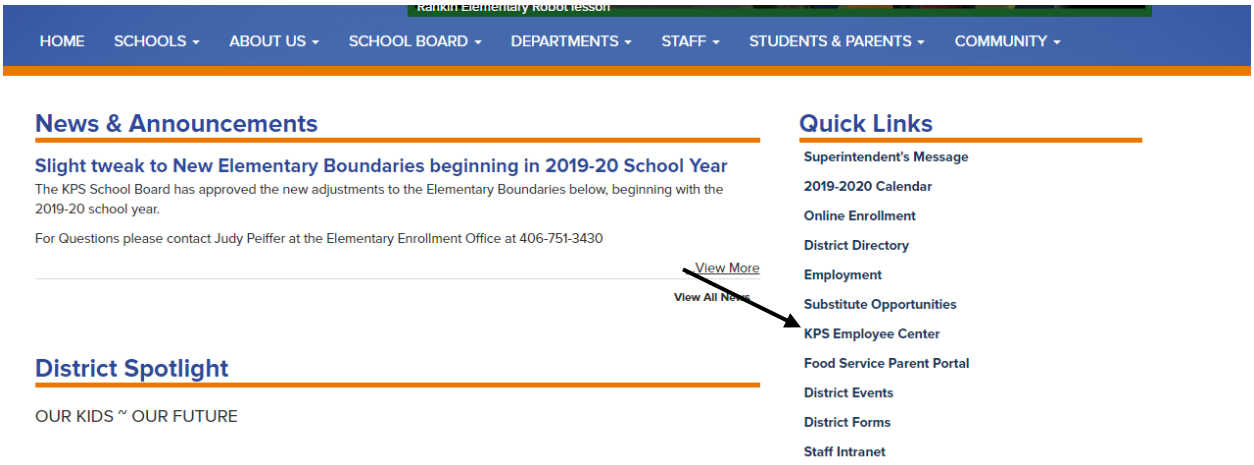
Page 11..... Absence Approval

Page 12..... Creating & Modifying Jobs by phone

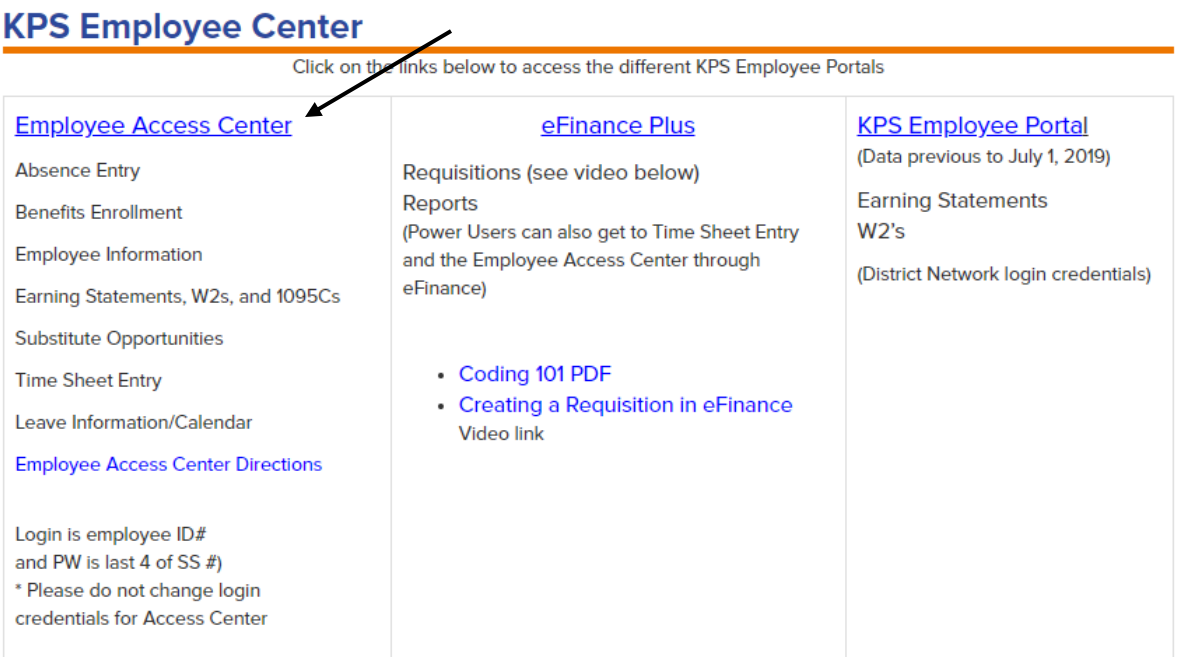
Page 13..... Review/Cancel/Modify a Job

Logging into SmartFindExpress

Step 1: Go to the Kalispell Public Schools Home Page, www.kalispellpublicschools.org and locate the Quick Links on the right hand side and click on Kalispell Employee Center

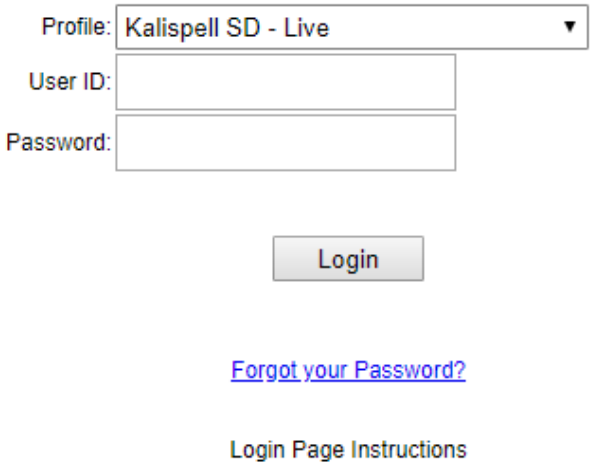


Step 2: Click on Employee Access Center.

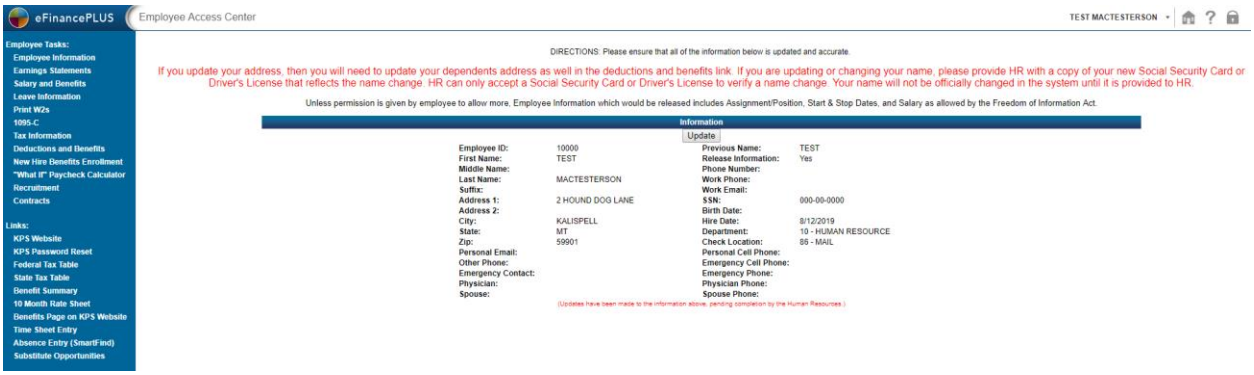


Step 3: Enter your Log in.

Your **User ID** is your Employee ID # and the **Password** is your last 4 digits of your Social Security #



Step 4: You are now in the Employee Access Center! Make sure all your information is completed **INCLUDING PHONE NUMBERS! If it is not complete, please update your info and click save!**



IMPORTANT:

All of your information must be complete in the system, especially your phone number. Please take a few minutes to review and update your information. Everything in this system is dependent on this page, so it is critical that it is correct and complete.

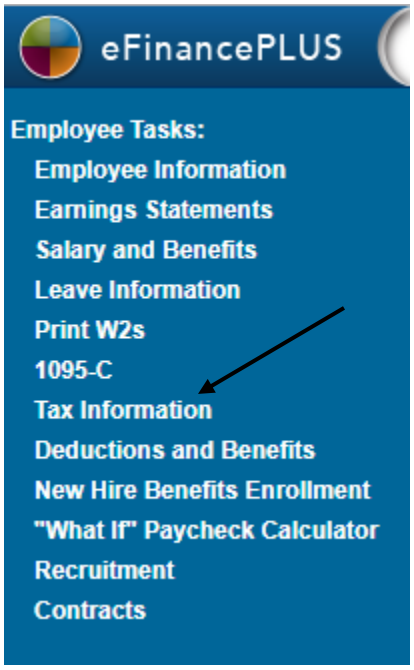
Information

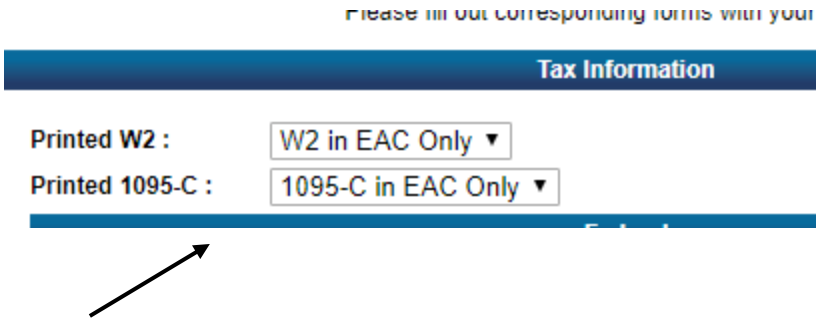
Employee ID:	10000	Previous Name:	TEST
First Name:	TEST	Release Information:	☑
Middle Name:		Phone Number:	406-000-0000
Last Name:	MACTESTERSON	Work Phone:	406-751-0000
Suffix:		Work Email:	
Address 1:	2 HOUND DOG LANE	SSN:	000-00-0000
Address 2:		Birth Date:	
City:	KALISPELL	Hire Date:	8/12/2019
State:	MT	Department:	10 - HUMAN RESOURCE
Zip:	59901	Check Location:	86 - MAIL
Personal Email:	tkljgoisjdls@gmail.com	Personal Cell Phone:	406-000-0000
Other Phone:	NA	Emergency Cell Phone:	406-000-0000
Emergency Contact:	Mom	Emergency Phone:	406-000-0000
Physician:	Big Sky Family Medicine	Physician Phone:	406-000-0000
Spouse:	Testla MacTesterson	Spouse Phone:	406-000-0000
Effective Date:	8/24/2019		

Save Cancel

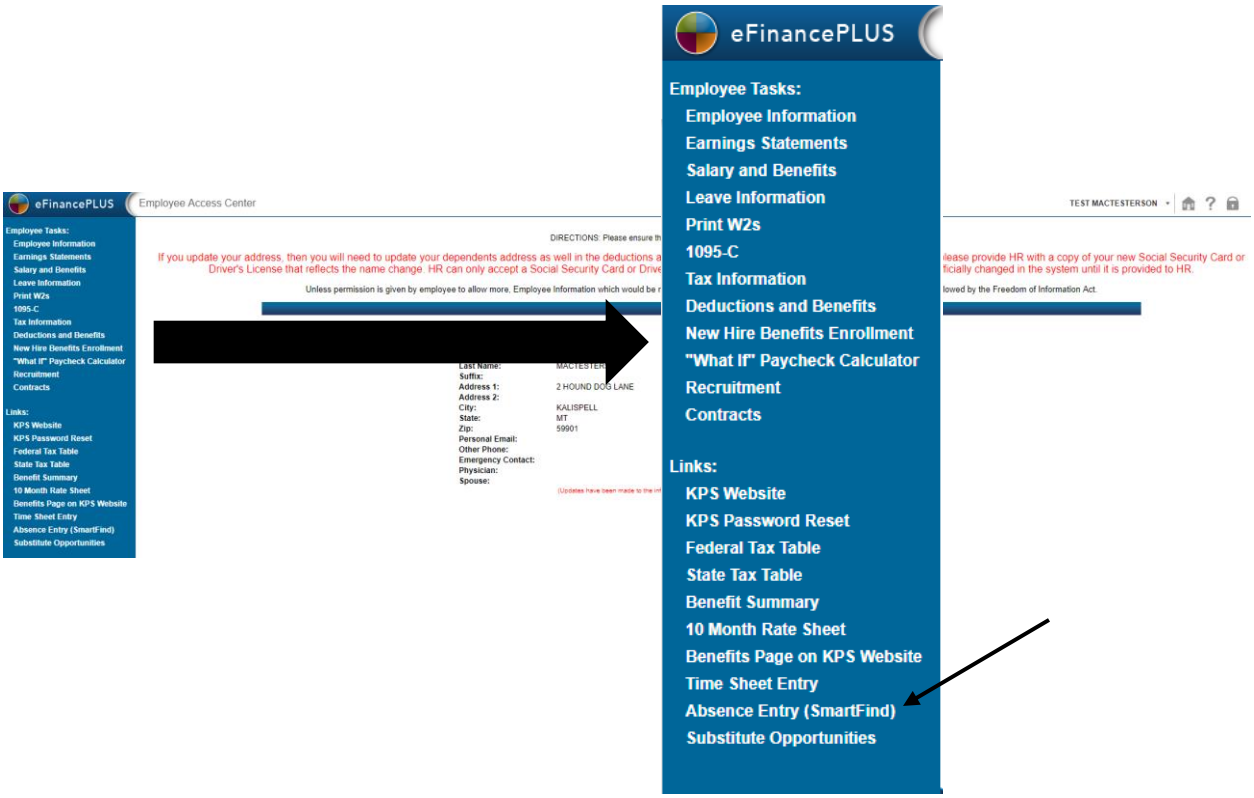
Wait, you're not done!!! What about your W2's and 1095-C's?

Please click on Tax Information and click the **Update** button. You have two choices, printed or EAC only. If you choose printed you will receive your tax paperwork on January 31st BUT if you choose EAC you will receive your tax paperwork on December 31st. We recommend choosing the EAC option.

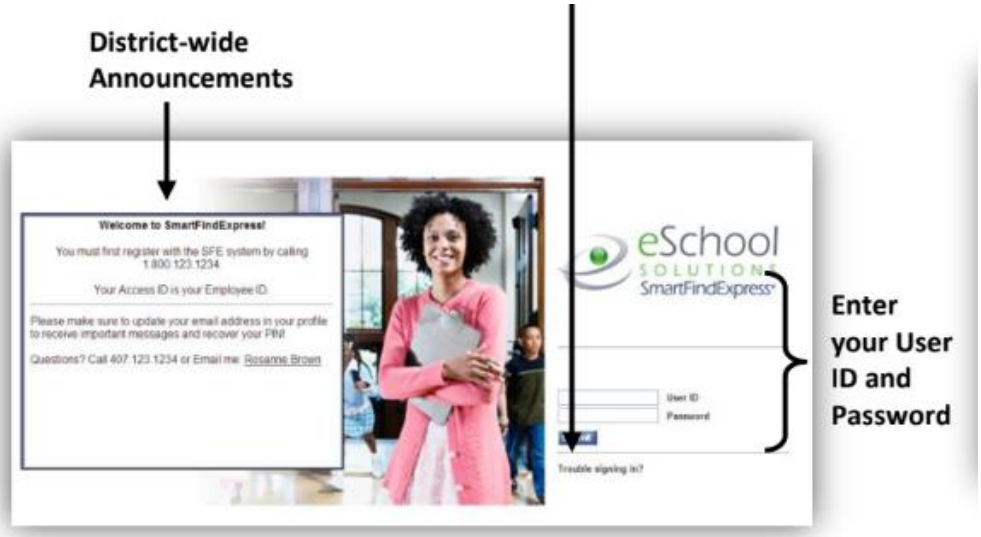




Step 5: Locate Link on the left-hand side of your screen and click on **Absence Entry (SmartFind)**

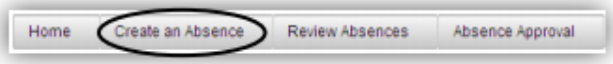


Step 6: Enter your User ID and Password again. Also check out the District-wide announcements before you hit submit.



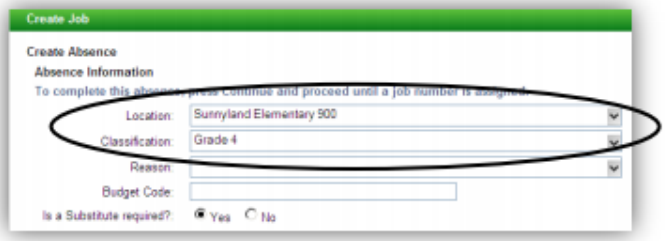
Create an Absence

1. Click Create an Absence to display the Create Absence page.



2. The Location field displays your primary location.

3. The Classification field displays your primary classification.



For Itinerant schedules, all of the locations and classifications you work are visible on the pull-down menu.

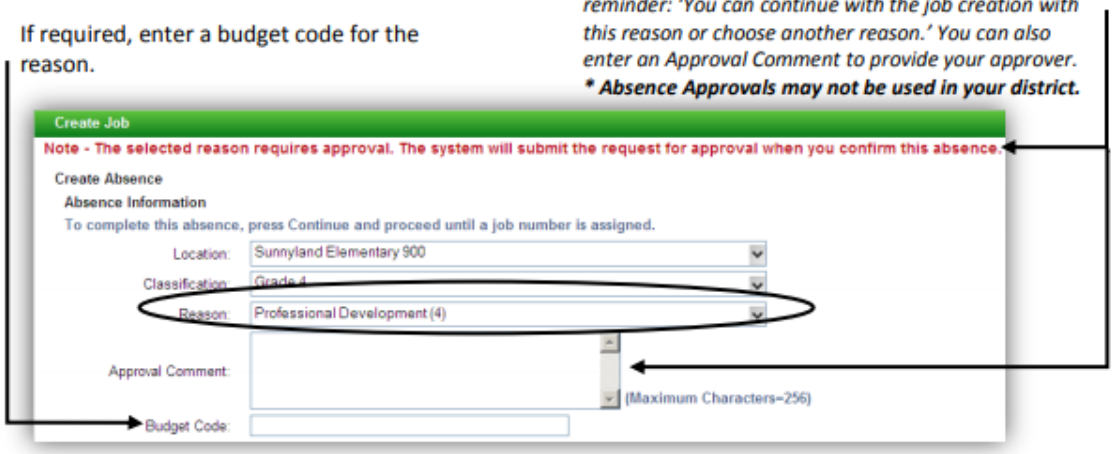
Location
To report an absence for a different location, use the drop-down menu to change the location of the job.

Classification
To report an absence for a different classification, use the drop-down menu to change the classification of the job.

4. Select a Reason to assign to this absence.

5. If required, enter a budget code for the reason.

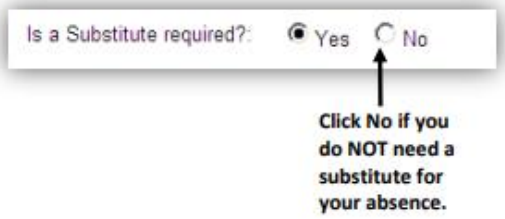
If you select a reason that requires administrator approval, the Create Job screen displays the following reminder: 'You can continue with the job creation with this reason or choose another reason.' You can also enter an Approval Comment to provide your approver.
**** Absence Approvals may not be used in your district.***



6. Choose **Yes** or No to indicate if the absence requires a substitute.

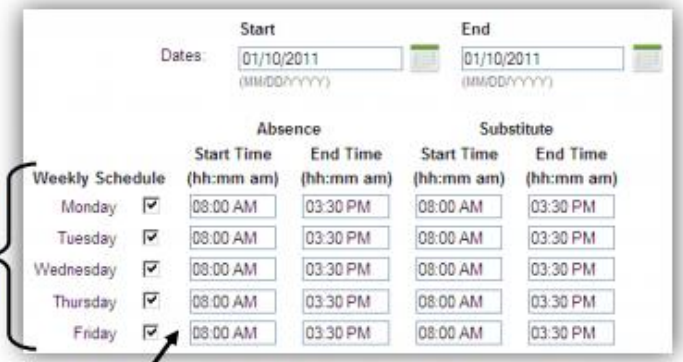
If a substitute is not required to fill the absence, click **No**.

The choice of indicating if a substitute is required is only offered if the absence would normally require a substitute.



7. The default for entry of an absence is today's date. To edit the dates, click the calendar icon to display the calendar, or type in new dates. ***You may not enter an absence for past dates.***

8. The selected location's Start Time and End Time are displayed. Substitute times default to the absence times. To change the hour/minute or am/pm indicator, select the field and then use the up or down arrow on your keyboard to make changes.

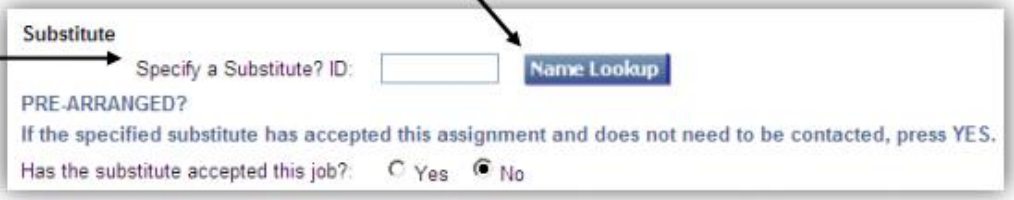


9. You can modify your work schedule. The workdays must correspond to the days of the absence being reported.

If absence days are non-consecutive, or if each day of the multiple-day job has a different start/end time, make the adjustments to the weekly schedule.

If separate Absence and Substitute times are used, Start/End Time fields will display for both sets of time. *A time modification to Absence Start will automatically reflect on Substitute Start Time; a time modification to Absence End Time will automatically reflect on Substitute End time.*

10. To specify a substitute for the absence, enter the substitute's ID number. If unknown, click *Name Lookup* to display the Substitute Name Lookup screen.



If the substitute has accepted the job, click **"Yes"**. The **substitute will be assigned** to the absence and the system will not call the substitute. This is called "Prearranging."

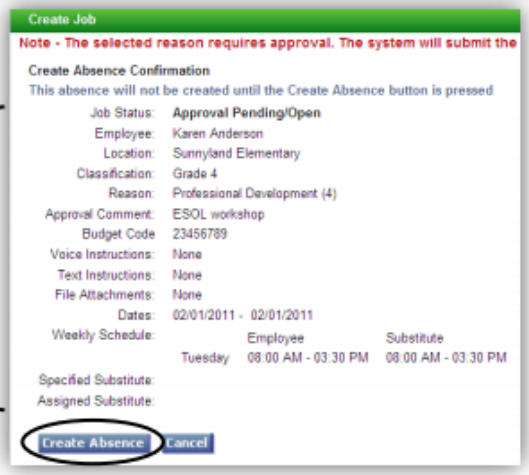
Click **"No"** if the substitute has not accepted the assignment. **Phone calls will be made to offer the substitute the job**. If the specified substitute does not accept the job the system will call other qualified substitutes.

11. Add any instructions you want to provide to the substitute. These instructions will also be voiced to a substitute over the telephone.

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

13. Click **Continue** for the next page. If any errors are detected on the form, you will have the opportunity to make corrections.

14. Verify the absence information and then click ***Create Absence*** to create the job and receive a job number. To modify the absence information, click the Cancel button to return to the Create Job screen.

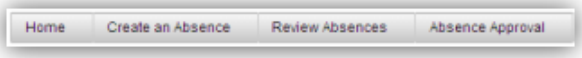


15. Clicking the ***Create Absence*** button displays the Create Absence Verification screen. A job number is created for the absence.

COMPLETE! You **MUST receive a Job Number** for your absence to be recorded in the system and to receive a substitute.

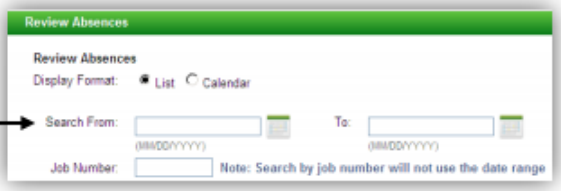
Review/Modify/Cancel Absences

1. Click the **Review Absences** Menu.



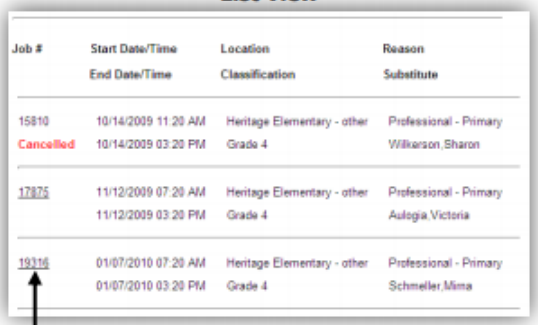
2. Search for absences by date range or enter the job number. Dates can be any date in the past, present, or future.

3. The default is to display the results in List View. Click the Calendar radial button to display your absences in Calendar format. The start and end times of the job are displayed.



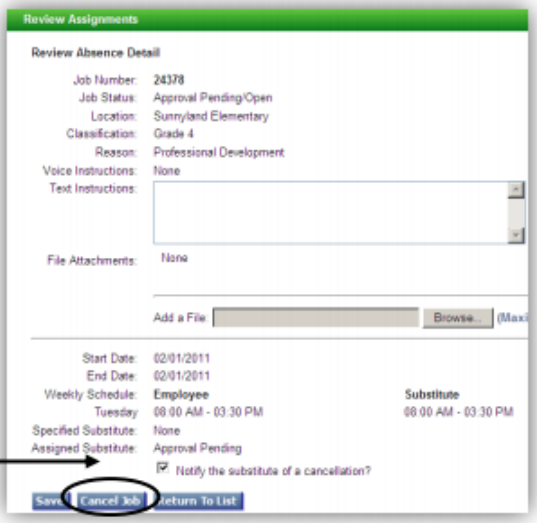
Calendar View

List View



4. Clicking the **job number link** displays the Review Absence Detail screen. You can view, update or cancel future absences.

5. To **cancel an absence**, click the ***Cancel Job*** button.



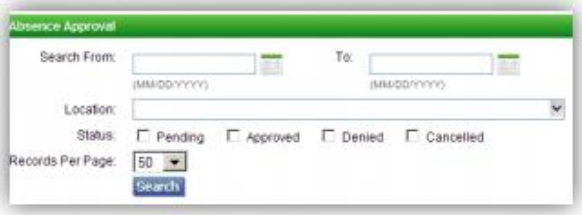
The system will notify the substitute of the cancelled job by placing a telephone call. Uncheck the "Notify" checkbox, if the assigned substitute does not need to be notified of the cancellation.

The Cancel Job button may not appear on the screen depending on your district's policies regarding cancelling absences. Please contact your School Administrator if you do not have the ability to cancel your absence.

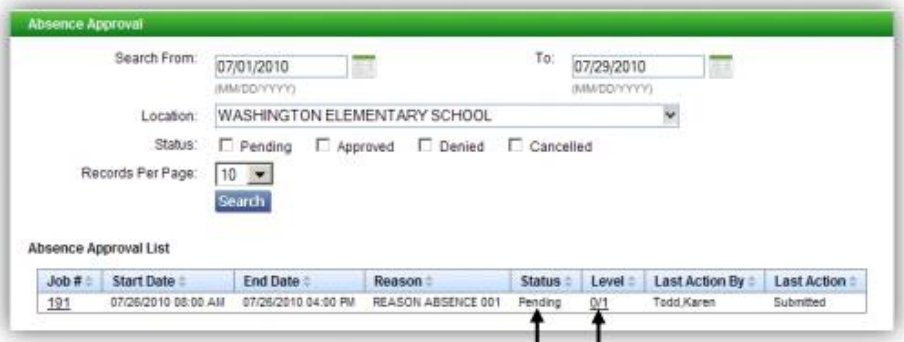
Absence Approval

1. Click the **Absence Approval** Menu.

2. Enter the dates for the search, choose the location of the absence requests, and select the status or statuses for your search. Click Search.



3. The Absence Approval List displays summary information on the absence request.



An Absence Approval status can be:
- ✓ Pending (Approval)
- ✓ Approved
- ✓ Denied
- ✓ Cancelled

The Level field shows the approvals received highest level compared to the reason level required.

4. Click the **Level** link to display the **Absence Approval History** log for the request. The log shows the history of actions performed on the request for each level.

Creating and Modifying Jobs over the Telephone

Before any features are available, you must register with the system and create a PIN. The Access ID and PIN are used for all interactions with the system.

Creating Absences

Absences can be reported for today, tomorrow, or for specific dates in the future.

1. Call the main system number and enter your Access ID and PIN, both followed by the star (*) key. Select "1" to create an absence.

2. If you have multiple locations and classifications in your profile, select one from the list. **NOTE:** *If you have multiple schedules for the same classification, you may not be able to create your absence on the telephone. You will be able to create the absence on the Web.*

3. Select the absence start/end dates. Indicate whether the absence is only for today, tomorrow, or if you want to enter the dates. Use MMDD format.

4. Select the absence start/end times. The default times for the absence location will play. Accept the default or enter specific times. Use HHMM format. Either the 12-hour clock or military times. Indicate am or pm for the 12-hour clock. If a multiple day absence, each day's times must be confirmed. The absence times are also used for the substitute times.

5. Select a reason for the absence and press the star (*) key. A list of reasons is played, but the reason can be entered at any time.

6. Record special instructions for the substitute. The substitute will know the dates, times, location, classification of the absence and your name.

7. Choose if a substitute is required for the absence.

8. If a substitute is needed, you may specify or prearrange a substitute. Requesting a substitute means that only the specified substitute will be called for that job until the following occurs:
   - A set time designated to release the job to other substitutes
   - The specified substitute declines the job
   - The specified substitute becomes unavailable for the date(s) and times of the job.

   The requested substitute can be prearranged. An absence is considered prearranged if you have talked with a substitute. Prearranged substitutes will not be called by the system. They have to access the system to obtain the job number.

9. Obtain the job number. Remain on the line and hear the job number played to you.

   Reminder: No Job Number means that the absence has NOT been created!

Review/Cancel/Modify a Job

After reporting an absence, you can call in and review or cancel an absence or modify the special instructions of a future absence.

1. Call the main number and enter your Access ID and PIN, both followed by the star (*) key.
2. Press "2" to review, cancel, or modify an absence.
3. Open and active jobs are played in date order. To view past jobs, use Web access. After each job is played, you can repeat the job information, hear the next job, modify special instructions, or cancel the job. To modify the job's dates, times or reason information, you must cancel the job and then create a new absence.
4. When canceling a job that has an assigned substitute and if allowed, you will be asked to indicate if the system should call the assigned substitute. To confirm cancellation, please wait until the system says, "Job number **xxxxxx** has been cancelled." If you do not stay on the telephone to hear the cancellation confirmation, there is no guarantee that the absence has been cancelled.

Entering Alphabetic Characters on the Telephone:
Press the digit that corresponds to the letter. For example, for A, B or C press 1.
If the system determines there are multiple codes that apply to the key presses, you will hear a list of codes. Choose the correct code from the list.