San Diego Unified School District
Substitute Management Unit

SAMS / SmartFindExpress Guidelines and Timekeeping Information

This guide will help provide many answers to specific questions you may have, as you work with SAMS/SmartFindExpress (SFE) as an administrative user. There are many details pertaining to absence reporting, timekeeping and effectively working with SmartFindExpress that are important for you as a timekeeper. Please read through it for a better understanding of the system and keep it as a reference guide in your office. Refer to it before calling the substitute help desk. If you have questions that are not covered here, please call Human Resources (refer to the directory at the end). The guide is also posted on the Payroll Department website under Timekeepers: Payroll Resources>SAMS Information.

When you are looking for specific information, check the index on the next page to find what you need. We have the guide sectioned as follows:

If you are a new timekeeper or administrator, the substitute help desk is available to assist you as you learn to use the SmartFindExpress system. When logged into the webcenter, there is a help section in the top right corner of the screen. There you will find the 'Administrator User Guide' that goes into more detail about using the system. Keep in mind that the SmartFindExpress administrator guide was written by eSchool Solutions with some features that our district did not select as options for our use. You will need to skip over those sections. The guide will help acquaint you with many features of the system with more details than we can provide in our district general informational guide.

If you have years of experience using SmartFindExpress, please still read through this guide to make sure you are following the recommended best practices by the district. Accurate reporting of absences and reporting of payable hours to substitutes, will save you time in contacting the substitute help desk, payroll and your budget analyst to fix records. It is important to stay on top of timekeeping and that you read all communications regarding timekeeping sent to you by payroll. If you are not receiving timekeeping emails, please request to be added to the list-serv with payroll. If you want to review past notifications, they are posted on the payroll department website.

Our substitute help desk operators are here to assist you, but keep in mind that the availability to reach us quickly during the start of the school year and other busy times, can make wait times long. Your patience is always appreciated. If you don't need immediate assistance, keep in mind that you can send us a message through subhelp@sandi.net and we will get back to you as soon as possible. Please be ready with detailed information such as the job number, employee ID or substitute ID and name. Please do not put us on hold because usually there are other callers are waiting to reach us.

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Guidelines for Timekeepers/Smart Find Express Administrators

Registering with SAMS is required for all new employees in the district
It is important that each new (to the district) employee registers with SAMS as soon as possible to set up their personal identification number (PIN). This will activate them in SAMS and allow them to report absences when necessary and to access ERO to sign up for training. Please give these instructions to all employees that need to register as first-time users.

> *To register, call the SAMS number at (619) 297-0304. Enter the Access ID (Employee ID) followed by the star (*) key. When the system asks for a PIN, enter the <u>employee (Access) ID and star key **again**</u>. The system will ask for a name to be recorded. After following the prompts to confirm the location and classification, the system will ask for a PIN to be created and entered that is at least six (6) digits. When finished press (9) to close out and end the call. This process gives access to SmartFindExpress on the phone line or the web at:* https://subweb.sandi.net/logOnInitAction.do

If an employee has registered on the system as a substitute or an employee in the past, they do not need to register again. Please make sure that their classification and hours are correct in SAMS. All modifications to employee profiles and school site profiles are managed by the substitute help desk. That means that any changes or corrections need to be requested by fax, school mail or emailed to subhelp@sandi.net. We prefer a list of changes needed to be made that show the employee name, ID number, and changes, rather than individual calls from you or the employee.

Note: There are employees that do not receive a substitute in their absence, but still need to enter their absence for timekeeping purposes and for access to ERO. When they register to get a PIN number, they will hear 'school site support' or 'no subs required' as their classification. They were entered into SAMS with that classification which means that **no** substitute will be called to cover their absence.

Different Access for Administrative Users
As a SmartFindExpress Administrator for your site, your access number and pin are different from your employee access. If you ever need your administrative access codes because you are new or don't have them, contact the substitute help desk. When you want to change the pin number, please let us know or you can change it yourself from the 'Profile' tab at the top right corner of the screen when you are logged in. Site pin numbers were originally created by using the location number twice. If it looks like they have never been changed, you will want to change it for security purposes, <u>which we highly recommend.</u>

Check for Announcements When You Log in to SmartFindExpress
Each morning, check for any new announcements when you first log into SmartFindExpress. We try to post important information to keep you updated with new or critical information we need to share with you. We have 8 in-bound phone lines and 38 out-bound lines that call out to substitutes in order to fill all open jobs in the district. The calls start at 5 am going until 11:55 am for current day jobs. In the evening, the system calls for next day jobs at 5 pm and when it has exhausted trying to fill those jobs, it will start calling for future jobs until 9:30 pm. On Friday and Saturday nights the system calls to fill the future jobs that are still open. Keep in mind that the system calls out for a while on each job. If it is not filled after a number of calls, the system will pause in the callout on that job and then start the callout on other jobs. If the assignment has a specified

substitute to call, it will only offer it to them until shortly after 5 PM the night before it starts, unless the substitute declines the job. That may affect the ability to fill the assignment at busy times. If the specified sub is not answering their phone, they may need to be alerted that there is an assignment to accept or decline by calling the system or logging in to the web center.

To see details on the system for an assignment, open to the job detail screen. Click on the '*Filling Details*' button to view a list of calls made to qualified substitutes. Also listed are the substitute's phone numbers that you may want to use, by calling them directly to fill a job. A job created for the next day or for the future will not start calling until the evening callout. If it is far in the future, it will begin calling substitutes as it gets closer to the start of the job. If you want to see a list of disqualified substitutes and why someone was not called, check 'Display Disqualified Substitutes when you are looking at the job filling details, then hit the search button:

Job Filling Details

Search Criteria

Job Number:	2458669
Display Calls:	✔
Display Disqualified Substitutes:	✔
Records Per Page:	50 ▾

Search   Create Report   Return To Job

Run Your Job Report First Thing Each Morning
To run your daily job report and print a sign in sheet:
- Click on *Administrator* and choose *Job Inquiry Report,* change the sort order to show <u>Substitute Name</u> if you want the system to print a 'substitute signature line' and then click on *Search.*
- Select the *Create Report* button to create a sign in sheet of all jobs for the current day.
- Under *Print Details,* uncheck the information that you don't want included on your sign in sheet.
- Under *Print Totals for Primary Sort*, select *Print a signature line* and then hit *View Report.*
- Print your sign in sheet.

Have each substitute sign in and <u>out</u> as proof that the assignment was worked. Refer to the report when you verify the **Finished and Filled** jobs. If there were changes during the morning, print and attach the revised report. You will want to run a finished job report the next day to make sure an employee did not enter an absence late in the day or by mistake, instead of a future date. If they entered their absence in error, they cannot cancel and you will need to cancel the absence for them. Do not leave it on the system. Check mid-morning to see if all jobs are filled or if someone has posted another absence that you are not aware of. If a job is showing as unfilled and you no longer need it filled, please click on the 'stop callout' button. If the system has already stopped calling, click the 'start callout' button and then the 'stop call' out button so that it is no longer visible on the web center or offered over the phone.

Every Substitute Must Be In a SAMS Job before Being Sent To the Classroom
Under no circumstances should a substitute be allowed to work without a job number, unless there is a power outage and you have no phone or computer connection. If you cannot enter them in the job, call the substitute help desk **immediately** to see the reason why the system has them blocked. If they did not update with us for the current school year or their credential, TB, mandated reporter or Kavanaugh have expired, they cannot work until they are updated in SmartFindExpress. They may have been terminated or blocked for a number of reasons and cannot work until their status has been made active again.

If a classification is not in their profile, give us a call to see if it can be added. Certain classifications require appropriate training, accreditation or approval in order to be added to a substitute's profile. Please do not send them to the classroom until you can enter them in the job. If the substitute is replacing an employee that works through a Special Education Department, ask them to sign in with their job number and the name of the employee and the name of the department. Check in with the department, because they may need a timecard to verify and pay the substitute.

When you don't have web center access when SAMS is down, you can call into the system with your administrative codes (same as used for the web access). The system will allow you to listen to assignments and create jobs. Job aid is on the current substitute and visiting teacher website at:
 https://www.sandiegounified.org/current-substitute-and-visiting-teacher-resource-site

If you find a substitute for an open job, stop the callout immediately and place them in it, otherwise the system will continue to call out and allow another substitute to accept the job. If that happens, you will have two substitutes for the same assignment and both of them will need to be paid. Which creates a problem, since the substitute with the job number in SAMS has the assignment and the other one that was expecting you to assign them to the job, does not. If you need to release a substitute, please first call the substitute help desk to see if there are any open jobs that we can offer to them, before you send them home. If we cannot find another job, you may want to keep them, since they need to be paid for coming to your site, whether you called them in, agreed to have them come or they accepted the job from the system. If your employee or site calls in a substitute without setting them up in a job on the system, please create an absence or vacancy immediately and enter them into it before sending them to the classroom. If there is a problem with entering a substitute into an assignment, please call because we need to know immediately that there is a problem with the substitute. (See page 10 for more information) Remember to write in the job number on the sign in sheet and have them sign in. Please advise all employees to not prearrange outside of SAMS, that their sub needs to show as the assigned substitute, not just the preferred sub.

VERY IMPORTANT
All substitute hours need to go through time and labor with a SmartFindExpress job number for audit purposes. **Do not use a substitute record in time and labor to enter hours manually**. Substitutes are blocked after six months of inactivity on SmartFindExpress. They will be terminated if it appears that they are not accepting assignments. The number of days worked are counted when we are considering who can work as a substitute teacher during the summer recess. It is important that you show them working in a job on the system. If they are working as an hourly employee for your site, please create an hourly PAR to get them paid. You **can** enter hours manually into an **hourly** record for your site through the hourly PAR process, but **not** in a substitute

record without a matching job on SmartFindExpress. This includes all ELPAC testing jobs. (See page 10 regarding ELPAC testing)

How to Create an Absence
Go to *Administrator* and choose *Create an Absence*
- Enter employee's ID or use *Name lookup*
- Hit *Continue* and double check that it is the correct employee and classification
- Select reason for the absence
- If a substitute is not needed, please select '*No'* where it asks if a substitute is needed
- Enter dates of absence
- Work times will be blank if the employee is under your site's default schedule. Correct the times if they are incorrect, otherwise you do not need to change them. (If your school schedule has changed, contact the substitute help desk with a correction request)
- If the employee's schedule is different than the school schedule, click on *Modify Schedule*, uncheck non-workdays or correct times for a particular day. Let us know if we need to update their profile
- Double check employee and substitute times
- If you are assigning a substitute, enter substitute ID number.   If you use name look up, watch out for substitutes that share the same name. **Make sure** you answer '*Yes'* if the substitute has accepted the assignment. It is a good idea to always double check to see if it shows the correct response from you, that you didn't forget to assign the job to the substitute.
- Enter instructions for the substitute under the *Substitute Instructions* section. Enter notes if needed under *Administrator Comments*. They are viewable by you and the SAMS operators only
- Select the Continue button
- Check the absence information. If the substitute has <u>accepted</u>, their name will appear <u>twice</u>
- Select the *Create Absence* button to receive a job number. Please record the number

When reporting an absence or a vacancy, remember to leave special instructions about the assignment in the 'Substitute Instructions' section to ensure that the substitute has accurate information before accepting the job. Notes regarding the assignment should be entered under the Administrator Comments. We will leave notes there also when it is necessary to communicate with you on the assignment. These notes are not viewable by the employee or substitute.

All employees are required to use the system for reporting on or before the day of their absence if possible. If they fail to enter their absence on the day they are out due to an emergency, **<u>you will need to enter it on the system for timekeeping purposes because they cannot backdate their own absence</u>**. Encourage them to enter their absence as soon as possible, because last minute postings are hard to fill on busy days, such as Mondays, Fridays and during large professional development days.

Work Times Should be Checked When Creating All Jobs
When reporting a classified absence/vacancy, make sure the start and end times are correct. If it is a half day assignment that ends before noon, make sure you change it from PM to AM and the opposite with an afternoon assignment. This will ensure that the substitute gets the correct information and the hours worked will be correct when they go to time and labor. Classified

employees that have hours that differ from the school will need their profile to be changed by the substitute help desk. Any classified job that shows for 5 hours or more, will go into time and labor showing 30 minutes deducted for a lunch break. If the substitute does not take a lunch break, you will need to change the time before verifying the job for pay or make the correction in time and labor after the hours populates in time and labor.

Your school schedule times should show a visiting teacher start time that is at least 20-30 minutes prior to the start bell and 10 minutes past the end bell. This gives them time for orientation and closing/supervision. In the past we may have set your 'Minimum day' schedule according to your needs and request. We no longer recommend using the minimum day schedule because visiting teachers are paid for the whole day. Please let the substitute help desk know of any changes that need to be made, such as a variation of work hours, bell time changes or time changes for your classified staff. If your site still has a minimum day schedule set in SAMS, please let us know that you want it changed. Discuss this with your administrator.

<u>Please Note</u>* Certificated substitutes will be paid for a full day if the original assignment showed a full day or partial day, regardless if you had them stay the duration of the assignment or not. It is to your advantage to have correct information in SAMS and to remind employees to enter the correct information when they report their absence, including any special instructions. Do not modify a job to show as a minimum day after the visiting teacher accepts it for a full day. According to the collective bargaining agreement, they must be paid for the full day even if they accept a job for a minimum day and expect to leave at the time that showed in SAMS. When a substitute accepts a full day assignment and it is a minimum day at your site, you can release them, but they **must be paid for the full day.** Or you can have them stay and work in teacher related duties only (not clerical work). If a visiting teacher accepts an assignment and is extremely late or leaves the campus early, please send us a visiting teacher evaluation.

No absence should be reported in SmartFindExpress for an employee with an incorrect location. Please note that leaving special instructions about the actual location of the assignment, doesn't fix the situation and **will cause timekeeping problems**. If you see that an absence was reported by an employee that was transferred to a new location and is showing on your report, call us right away and we will cancel the job, create the absence correctly and inform the substitute and the other school. **Please do not cancel the job.**

There are times that your site will need a substitute and it can't be entered as an employee absence. Some examples of those circumstances are when there is approval for a new position, when a new employee is not yet in PeopleSoft and SAMS, or an employee is on leave of absence; you will need to create a vacancy using the reason *Vacancy* with the eight-digit position number. If a teacher needs class coverage for a field trip or for conferences, create it as a vacancy with the reason *extra help* with notes that it is to cover the teacher's classroom.

Creating a Vacancy

A 'vacancy' is reported for the following:

1. Actual vacancy at your site: Use the reason *Vacancy* and position number
2. A regular employee just hired and not showing at your location in SAMS and PeopleSoft needs to be paid as a substitute: Use the reason *Vacancy* reason with the position number. If the position number is not available, use the *Extra Help* reason temporarily, until you can find it and then change the reason and position number before you verify the job.
3. Employee going on a district approved leave of absence such as maternity, child bonding, family responsibility, or health reasons; enter the reason *Vacancy* reason and the position number,
4. School requiring extra help: Use the reason *Extra Help* or Extra *Help/Roving* for classroom coverage only.
5. When a substitute is needed during meetings, parent conferences, teacher absence for sixth grade camp or on a field trip, use '*Create a Vacancy* 'with reason *Extra Help*.
6. Substitutes in a long-term assignment that need a substitute, so they can go to professional development, will need to have you enter a *Vacancy* for *Professional Development* for callout. Make a note in the administrator's comment section to cross reference who the substitute is working for.

How to Create a Vacancy

Choose the *Create Vacancy* link

- Select the appropriate *Calendar* for the position and school site. It is important to enter the correct calendar so that the job does not run through non-work days and holidays
- Select Location if it does not show your location
- Select the Classification
- Select the vacancy reason, and then enter the position number for reason **8-Vacancy** only.
- Enter dates
- Enter substitute times if they differ then the scheduled times. Two digits for the hour, two for the minutes, space, then am or pm
- Modify schedule if it differs from day to day, by clicking on *Modify Times*
- Specify a *Prearranged Substitute* if you have one, making sure you answer '*Yes'* if the substitute has accepted the assignment. ***DO NOT*** have it call them if they have already said yes, because they usually will not answer during the callout because they believe they have the assignment. When that happens, the system will call other substitutes and you will have two subs show up
- Enter instructions for substitutes and enter administrator comments if needed
- Select the *Continue* button
- Confirm the vacancy information by checking all data. Prearranged jobs will show the v name twice
- Select the *Create Vacancy* button to receive a job number. Please record this job number and mark your calendar to change the reason code to *Long Term Vacancy* on the sixth day.

Remember: All vacancies **should** be reported with the correct Calendar Code. On the '*Create Vacancy*' screen, click the down arrow to the right of *Calendar* and select the correct code. Without the calendar selected, the assignment will run through holidays and vacations, when jobs should not show on the system. Also, you will have difficulties extending jobs with the incorrect calendar.

The only exception is before the school year starts and after it ends. Prior to the first day of school and the last day for teachers, the system is set as 'No sub required' work days. If a visiting teacher is opening or closing the classroom for an absent teacher, the sub will not show in the job. When the work day is finished, enter the substitute in the job and verify to pay them. A vacancy should be created with Calendar '8- Open Schedule' So that you can place or call out for a substitute

Please note that **only** child development centers use *02-Child Dev. Centers Only* Calendar. If you are a year-round school, the calendar would be *20-Preschool Year Rd* for a *CDA and 21-Preschool Year-Round* for a preschool teacher. Traditional schools would be *19-Preschool Traditional for a CDA and 22-preschool Traditional* for a preschool teacher. Clerical, Food Service, Principals and Central Office and Summer School have different calendars to select from depending on the calendar needed.

ALL vacancies with the reason *vacancy* reported in SAMS will require the appropriate 8-digit position number from your PeopleSoft report, to be entered into the SAMS 'Position Number' field before the system will create the vacancy. By using the correct position number, the substitute is budgeted to the district and not from your site. If a position number is entered into an absence or a vacancy extra help, the system will not recognize it as being valid data and will overlook that field. Always double check to make sure you have typed the number correctly.

Reason Codes for Absence and Vacancy

Absence Reasons to be used when reporting an employee's absence only

1-Illness	13-Paternity/Adoption (BU 1,6,7,8 only)
2-Personal Necessity (Emergency)	14-Military Leave
3-Bereavement	15-Unpaid Personal Business
4-Personal Business	16-Floating Holiday (Classified Only)
5-Vacation (Classified and Preschool)	17-Comp Day
6-Workers Compensation	19-Duty Free (Cert Only-for moving rooms)
7-Jury Duty	21-Union Business
10-Religious Holiday	26-Professional Development
11-Court Appearance	27-Testing

Reason codes for a Vacancy only

8-Vacancy	58-Long-term Vacancy
28-Extra Help	78-Long-term Extra Help
29- Extra Help/Roving	79-Long-term Extra Help/Roving

Administrative access only:

30-Administrative Leave	57-Long-term Jury Duty
31-PPI (AASD Only)	61-Long-term Court Appearance
51-Long-term Illness	63-Long-term Paternity/Adoption (Bargaining Unit 1,6,7,8 only)
52-Long-term Personal Necessity (Emergency)	
53-Long-term Bereavement	64-Long-term Military Leave
54-Long-term Personal Business	62-Long-term Unpaid Personal Business
55-Long-term Vacation (Classified and Preschool)	76-Long-term Professional Development
56-Long-term Workers Compensation	80-Long-term Administrative Leave

Long-term reasons are for administrative use only. Change the reason to *Long-term* on the **sixth** day that a certificated substitute works in an assignment. Teachers cannot change their jobs. Only certificated jobs should show a long-term reason, because visiting teachers and counselors are entitled to the higher long-term rate. There are other administrative reason codes, such as 30-Administrative Leave, 80-Long-term Administrative Leave, 31-PPI that only you can access. You will need to enter as needed since the employee cannot enter if for their absence reason

NOTE: 26-Professional Development can be used as the reason for a vacancy, when a substitute in a long-term vacancy needs a substitute while they are at professional development. In Administrator notes, list the name of the long-term substitute that is going to training. You will always need to enter the correct budget code in time and labor for assignments showing Professional Development, under the hours populate in time and labor.

ELPAC Testing jobs are created as a vacancy with the classification code 'T-ELPAC-SDEA Retiree' and reason code '27-Testing'. It is considered a non-classroom assignment and will be paid at the non-classroom teacher rate for the number of hours showing in the job. Hours populate from SAMS into the retired visiting teacher's 'non-classroom teacher' hourly payroll record. Do not enter hours into their substitute teaching record. Remember that because this is not a teaching assignment, there is no long-term pay. If the job is not filled, you can cancel the assignment and create it with the classification code 'T-ELPAC-Non-Retired Visiting Teacher'. They are paid at the regular visiting teacher daily rate. **All other needs for ELPAC testing will be handled by the classroom teachers and regular visiting teachers can work in the teacher's absence under the absence code '27 - Testing'.**

Filling the Same Day Absence after the Callout Period
SAMS has a feature that will allow the system to call substitutes for the same day assignments after the morning call out period has ended. The morning callout period is normally from 5:00 am to 11:55 am. But if the assignment starts late morning or in the afternoon, it will continue to call out for a substitute until the assignment is half finished. This helps fill absences that occur late in the morning or afternoon. If you have a late absence or want the system to continue calling to fill the assignment after 11:55 am, adjust the start time to activate the callout past the normal callout period.

Note: The substitute help desk does not fill assignments when a substitute calls us and asks to be placed in a job showing open on the system. They are instructed to contact the school to see if they are needed. If you want to assign the substitute, you will need to stop the callout and place them in the job. If you no longer want to fill the job through SAMS, stop the callout. The job will no longer be visible to the substitute when it shows stopped.

Please do not ask the substitute to come in to work the assignment without stopping the callout on the job and entering them in the assignment. Inform all of your office staff so they know the procedure if you are not there. If you need help, please call the substitute help desk immediately. When assigning a substitute after stopping the callout, you must leave the detail screen and reopen it or refresh the screen before entering the sub's ID number, so that the system accepts the change. Hit the save button to assign the job to the substitute.

Declining and Cancelling a Job
When a substitute cancels out in the morning of the assignment, they are instructed to call the school right away to inform you of the cancellation. There is a chance that **SAMS will not be able to fill an assignment when the substitute cancels the same day of the assignment. You may need to call your favorite substitutes to fill the job.** If the substitute has to cancel after the assignment has

started, they must call you so that you can take them out of the job, select the correct reason code and then you need to update your sign in sheet. You can choose to have the system stop calling out if it is late and you do not want another substitute accepting the job. Substitutes cannot cancel out after the job has started without your assistance, *please take them out immediately* when they call you.

Substitutes that have accepted a job from SAMS *should not be taken out of the assignment at the* last minute, unless they are an hour late from the start time or the time they accepted the assignment and have not called the school. They have the right to the job if they arrive at a reasonable time, even if a mistake has been made by the employee or by the site. If you do need to take them out of the job because they are not needed when they arrive at your site, call the substitute help desk immediately to see if there is another job we can offer them, otherwise they are entitled to be compensated for the full day and you should have them stay to work.

If there is a double booking, please do the same thing. If you wish to take them out of a multiple day job for performance reasons, you must have your administrator fill out an evaluation form immediately. Inform the substitute of the cancellation and change the end date on the job. We will then block the substitute from future jobs at your site. All performance evaluations have to be turned in to us within 10 days in order to be considered for action by Human Resources. Please make sure it is completely filled out and listed with the scoring numbers, then signed by your administrator. Please fax immediately and mail us the original. Confidential information cannot be emailed to us. You may want to send an email to subhelp@sandi.net to let us know that you are faxing an evaluation so that we look for it and process it quickly. If the fax does not go through, we will let you know. There are separate forms for visiting teachers, classified classroom subs and classified non-classroom subs such as clerical subs. Please down load current evaluation forms from https://www.sandi.net/staff/human-resources/human-resources-forms and discontinue using old forms.

When a job is cancelled, there is an option for the system to call and email the assigned substitute to inform them of the cancellation. *If you have to cancel a job, please call the substitute personally to let them know or leave a message.* Do not depend on the system reaching the substitute to inform them of the cancellation, it cannot leave a message. If the system does not reach the substitute and because it doesn't leave a message, the substitute is never informed and will show up expecting to work. Calling them personally is considered a 'Best Practices' procedure. Please inform your employees to do the same. If you have already told the substitute, click on 'no' for calling so they are not bothered with phone calls.

Substitutes are encouraged to accept assignments from all geographical locations in the district. They have the option to decline assignments offered to them. Substitutes are required to enter the reason why they decline or cancel an assignment. The system will also ask for a reason if the site cancels a substitute that has already accepted the assignment. Please select the correct reason code.

Decline/Cancellation Codes

1-Not qualified for the assignment	#6	6-Personal Business
2-Illness-Personal	#7	7-Working Elsewhere/Within the District
3-Illness-Family or no child care	#8	8-Working Elsewhere/Outside the District
4-Transportation Problem	#9	9-Other Reasons
5-Sub No Show		

Visiting Teachers in a Long-term Assignment

A long-term visiting teacher who is returning to the same assignment after an absence of five (5) workdays or less shall continue to be compensated at the long-term rate of pay providing the absence was due to one of the following absences:

1) Observance of a religious holiday (up to 3 days per school year)
2) Personal illness or injury
3) Serious illness or death of an immediate family member
4) Accident
5) Birth of a child or adoption of a child
6) Appearance in court as litigant or witness
7) Unpredictable and verifiable act of nature (fire, flood, tornado, earthquake, or other acts of nature of similar intensity)

*Please see the SDEA contract; Article 32, Section 32.2 WAGES under 32.2.4 for clarification. Winter break does not count against the substitute in a long-term assignment, so the long-term reason continues after the holiday and school resumes. All certificated assignments should show in a long-term reason starting on the sixth day and not before. Long-term visiting teachers will ordinarily work during staff development days as part of their assignment. If the visiting teacher is excused from attendance, they shall continue to be compensated at the long-term rate of pay upon resumption of duties following the staff development day

Requirement of All Substitutes

It is a state requirement that all employees of the district take the Mandated Reporter on Child Abuse and Neglect training. This includes all substitutes and hourly employees. Our substitutes must take the online training and are expected to print or scan and email/mail/fax the certificate to us as proof. Substitutes are blocked in SAMS until the certificate is turned in. Currently the next deadline is October 31, 2018 and substitutes cannot be entered in jobs for that date or beyond, until we receive their current certificates. At this time, please don't enter absences or vacancies that go beyond that date or the system will not call out for a substitute. Substitutes will be given reminders soon and we will be updating them for this year as soon as possible. Recently hired substitutes have a six-week grace period from their date of hire to turn in their certificate.

Sick Leave for Substitutes

Effective July 1, 2015 under the Healthy Workplaces/Healthy Families Act of 2014, Labor Code Section 245, we are now required to provide sick leave to hourly employees. That means that our certificated and classified substitutes are entitled to receive up to three (3) paid sick days or 24 hours of sick leave in a 12-month period for the diagnosis, care or treatment of a health condition or for preventative care or caring for their family member. The Act also provides paid sick days to an employee for certain purposes related to being a victim of domestic violence, sexual assault or stalking. Employees are eligible to begin to accrue paid sick leave provided that on or after July 1, 2015 they have worked in California for 30 or more days within a year from commencement of employment with the district. Sick leave accrues at a rate of one (1) hour for every 30 hours worked. Hourly employees not represented by a collective bargaining agreement are entitled to use accrued sick leave beginning on their 90th day of employment and an employee's paid sick leave accrual may not exceed 48 hours per fiscal year. Hourly employees are not eligible to use paid sick leave in advance of accrual. An Hourly Employee Sick Leave Request Form must be completed to document the request to use paid sick leave and be forwarded to the appropriate timekeeper for entry based upon the procedures below. The original leave form must be retained by the timekeeper reporting the absence into Time and

Labor and be filed with all other payroll records for that location according to district records retention guidelines.

SDEA CalSTRS retirees working in hourly assignments are now eligible to accrue sick leave or use any sick leave accrued prior to retirement to cover an absence in their hourly assignment.

Please refer to the district website at: https://www.sandiegounified.org/healthy-workplaceshealthy-families-act-2014 for guides and refer substitutes also to find the appropriate timecard.

Procedure for Certificated Hourly Employees

Day-to-Day Visiting Teachers: (Includes Early Childhood Ed. Visiting Teachers and Counselors)
Absences eligible for use of paid sick leave by day-to day visiting teachers who decline an assignment offered through the Substitute Assignment Management Systems (SAMS) will be reported and approved by Human Resource Services Division staff in the Substitute Management Unit. In order to use accrued sick leave to cover an absence and receive compensation, a day-to-day visiting teacher must first decline the assignment in SAMS and then submit a completed Hourly Employee Sick Leave Request Form to the Substitute Management Unit in a timely manner for payroll reporting on the next available payroll processing date. **Please note that when declining the assignment in SAMS, illness must be selected as the reason for the absence in order to be eligible to receive the sick leave benefit.** The Hourly Employee Sick Leave Request Form may be obtained online at http://www.sandi.net/staff/human-resources/sub-illness-reporting. Timekeepers will be required to make the form available to employees. The completed Hourly Employee Sick Leave Request Form may be submitted to the Substitute Management Unit by Fax (619.686.6650), by e-mail (sub-illness-reporting@sandi.net) or by mail to: Eugene Brucker Education Center Human Resources-Substitute Management Unit 4100 Normal St Annex 9, San Diego, CA 92103. Substitute Management Unit staff will verify that an employee was offered and subsequently declined an assignment from SAMS for the date(s) on the Hourly Employee Sick Leave Request Form. Day-to-day visiting teachers who become ill after reporting to a school site and request to leave before the assignment day ends may request to use hours equivalent to the portion of the day that remain. An Hourly Employee Sick Leave Request Form must be submitted following the directions outlined above.

Absences eligible for use of paid sick leave for day-to-day visiting teachers who decline an assignment offered directly by a department and not offered through SAMS will be reported by the timekeeper for the department that offered the assignment. Employees must complete an Hourly Employee Sick Leave Request Form and submit it directly to the department timekeeper for entry into Time and Labor.

Long-Term Visiting Teachers (Not Early Childhood Education Visiting Teachers) are defined as those visiting teachers who complete more than five (5) consecutive teaching days in a single assignment are eligible to use paid sick leave for Long-Term visiting teachers and will be reported by the timekeeper at the location where the employee is working the assignment. Employees must complete an Hourly Employee Sick Leave Request Form on returning to the assignment and submit it directly to the site timekeeper for entry into Time and Labor.

Long-Term Early Childhood Education Visiting Teachers are defined as visiting teachers who complete 20 or more consecutive teaching days in a single assignment. Absences eligible for use of paid sick leave for Long-Term Early Childhood Education visiting teachers will be reported by the timekeeper at the location where the employee is working the assignment. Employees must complete

an Hourly Employee Sick Leave Request Form and submit it directly to the site timekeeper for entry into Time and Labor.

Visiting Nurses:
Absences eligible for use of paid sick leave for certificated hourly employees who decline an assignment offered by the Nursing and Wellness Department will be reported and approved by the Nursing and Wellness Department. In order to use accrued sick leave to cover an absence and receive compensation, a certificated hourly employee must first decline the assignment and then submit a completed Hourly Employee Sick Leave Request Form to the Nursing and Wellness Department in a timely manner for payroll reporting on the next available payroll processing date. The Hourly Employee Sick Leave Request Form may be obtained online at http://www.sandi.net/staff/human-resources/sub-illness-reporting. Timekeepers will be required to make the form available to employees. The completed Hourly Employee Sick Leave Request Form may be submitted to the Nursing and Wellness Department by Fax (619.725.8073), by e-mail (estewart@sandi.net) or by mail to: Eugene Brucker Education Center, Attn: Nursing and Wellness, Room 2121 4100 Normal St Annex 9 San Diego, CA 92103

Other Certificated Hourly Employees (Certificated Hourly, Speech Language Pathologists and School Psychologists):
Absences eligible for use of paid sick leave for certificated hourly employees who decline an assignment offered directly by a department and not offered through SAMS will be reported by the timekeeper for the department that offered the assignment. Employees must complete an Hourly Employee Sick Leave Request Form and submit it directly to the department timekeeper for entry into Time and Labor.

Procedure for Classified Hourly Employees

Classified Day-to-Day Substitutes:
Absences eligible for use of paid sick leave by a classified substitute who declines an assignment offered through the Substitute Assignment Management Systems (SAMS) will be reported and approved by Human Resource Services Division staff in the Substitute Management Unit. In order to use accrued sick leave to cover an absence and receive compensation, a classified substitute must first decline the assignment in SAMS and then submit a completed Hourly Employee Sick Leave Request Form to the Substitute Management Unit in a timely manner for payroll reporting on the next available payroll processing date. **Please note that when declining or cancelling out of an assignment in SAMS, illness must be selected as the reason for the absence in order to be eligible to receive the sick leave benefit.** The Hourly Employee Sick Leave Request Form may be obtained online at: http://www.sandi.net/staff/human-resources/sub-illness-reporting

Timekeepers will be required to make the form available to employees. The completed Hourly Employee Sick Leave Request Form may be submitted to the Substitute Management Unit by Fax (619.686.6650), by e-mail (sub-illness-reporting@sandi.net) or by mail to: Eugene Brucker Education Center Human Resources-Substitute Management Unit 4100 Normal St Annex 9 San Diego, CA 92103. Substitute Management Unit staff will verify that an employee was offered and subsequently declined an assignment from SAMS for the date(s) on the Hourly Employee Sick Leave Request Form. Classified substitutes who become ill after reporting to their assignment and request to leave before the assignment day ends may request to use hours equivalent to the portion of the day that remain. An Hourly Employee Sick Leave Request Form must be submitted following the directions outlined above.

Classified Substitutes Assigned to a Site/Department for More Than 5 Days:
Absences eligible for use of paid sick leave by classified substitutes in an assignment of more than 5 days will be reported by the timekeeper for the site/department that offered the assignment. Employees must complete an Hourly Employee Sick Leave Request Form and submit it directly to the site/department timekeeper for entry into Time and Labor. This will be the same timekeeper who has been reporting the regular hours worked.

All other Classified Substitutes assigned directly to a department and not in SAMS/SmartFind Express:
Absences eligible for use of paid sick leave by classified substitutes who decline an assignment offered directly by a department and not offered through SAMS will be reported by the timekeeper for the department that offered the assignment. Employees must complete an Hourly Employee Sick Leave Request Form and submit it directly to the department timekeeper for entry into Time and Labor.

Credential Information on 30 Day Permit Substitutes
Visiting teachers with 30-day emergency permits are not eligible to teach over a total of 30 work days for the same teacher or classroom during the same school year. In addition, no visiting teacher is eligible to teach in the same Special Education classroom for more than 20 workdays unless they hold the correct Special Education Credential. This includes visiting teachers with regular education credentials. If a visiting teacher is needed for a special education assignment for more than 20 days, contact your Human Resource Officer for assistance. If a certificated absence or vacancy is going to go beyond 30 days, you should also check with Human Resources to make sure the visiting teacher has the appropriate credential. Your Human Resource Officer needs to be aware of all long-term assignments.

Matching Classification for Substitute to Work the Assignment
Classification must match between the employee and substitute when creating a job. SAMS matches the classification (grade level/subject area) of a regular employee with that of the substitute. When the system does not find a matching classification, the following message appears, "Error: The assigned substitute is not available for this job, *Job Classification* is not in profile." When you see this message, specifying or prearranging is not possible without calling the Sub Help Desk for assistance or advice.

Creating a Vacancy or Reporting an Absence for an Employee Assigned to a Central Office (Education Center, Child Development Center, Special Education, etc.)
If you have to report a vacancy or an absence and you require a substitute, please leave special instructions under 'Substitute Instructions' to indicate the specific location (with directions, if necessary) where the substitute should report. Include a name and phone number that the substitute can call for additional information regarding the assignment. It is a good idea to leave the above information as a text message under 'Administrator Comments' for future reference, since voiced messages cannot be retrieved when the assignment is finished.

NOTE: When special instructions are not showing on the assignment, we put a 'stop callout' to the job and no substitute will be called until we can find out the work location. **Please inform your employees working at your site through a special education department to list your school location and details when reporting their absence in SAMS.**

Reporting a 'Sub for a Sub' on SmartFindExpress

Substitutes cannot order a substitute for themselves like a regular employee. They should not cancel out of their long-term job. In an emergency, before school starts they can call the substitute help desk for assistance. Otherwise, they will need your help in modifying their current or future job as the following examples show:

a. <u>'Sub for a Sub' for the current day.</u>
- a. --Modify the long-term assignment to start on the day the long-term substitute will be back.
- b. **Important**: Click "Save" and verify that dates are correct.
- c. --Create an absence or open a vacancy for the day(s) the long-term substitute will need a "Sub for a Sub". *Match job information with the original job*, but do not use the long-term reason code for a short term visiting teacher

b. <u>'Sub for a Sub' needed at a future date.</u>
- a. --Modify the long-term assignment to end on the last day the long-term substitute can work before the day(s) they are not going to work.
- b. **Important**: Click "Save" and verify that dates are correct.
- c. --Create new absence or vacancy for the day(s) a "Sub for a Sub" is needed.
- d. --Then finish the rest of the assignment by re-creating the absence or vacancy to start from the day the long-term substitute will be back on the long-term assignment until the end of the job. *Match job information with the original job*.

c. <u>'Sub for a Sub' for a long-term substitute to attend district professional development.</u>
- a. --Create a vacancy and select Professional Development, Code #26 as the reason with notes that the job is for coverage while the long-term sub is at professional development. No change is to be made on the existing long-term assignment for the long-term substitute. The substitute will be paid through the long-term assignment.

Update Job Information in SmartFindExpress before the End of the Work Day

It is extremely important to monitor daily assignments on SmartFindExpress. Any assignment changes such as: cancellations, reassignments, changes of work times, or extending a job should be handled right away and must be made before the end of the same work day so that it isn't forgotten. Hourly data automatically populates in time and labor when the job is verified, and you cannot make changes to a job after it is verified. To avoid overpayment or underpayment problems, you must check your sign in sheet against your Finished/Filled report when verifying jobs. In the event that incorrect data is transferred into PeopleSoft time and labor, corrections must be made immediately in PeopleSoft and you will have to call the substitute help desk to make the changes in SmartFindExpress. When we update the job, it is for correcting the job record only and the change we make in SmartFindExpress does not automatically update data in time and labor for you. <u>You will need to make the correction in time and labor, so you may want to make a note to follow up with those changes.</u>

Any changes to budget codes after the payroll deadline will have to be made by your budget analyst in the general ledger. Records in SmartFindExpress should match records in the payroll records. That includes employee records. Cancel the absence if an employee worked that day. **Always cancel the substitute out of the assignment if they did not work the job.** That will prevent you from accidently verifying the job and paying a substitute that did not work.

Verifying Jobs
Verification of jobs is a very **important** part of the timekeeping process. Hours worked by a sub will not populate in PeopleSoft/Time and Labor and substitutes will not be paid, unless the jobs are verified in SmartFindExpress. Timekeepers must verify all jobs that had a substitute that worked, at least one day before the timekeeping deadline for that payroll period. However, **it is strongly recommended that timekeepers take a few moments each day to verify** *finished/filled* **jobs**. When you wait until the last minute, if there is a problem with the job, the substitute won't get paid correctly or hours won't go through in time for the payroll deadline. Please **only verify jobs that had a substitute** that signed in to work and should be paid. **Unfilled assignments do not need to be verified.** Once a job is verified, you are no longer able to make corrections. By verifying only filled assignments, you can make corrections as needed to those assignments that did not have or require a substitute.

To verify jobs, you'll need to have the printed substitute sign-in sheet for the day you are verifying, so that you can verify against the ***Finished*** *and* ***Filled*** report. Follow these steps:
- In the SmartFindExpress (SAMS) system, select *Job Inquiry/Reports*
- In *Job Type*, select *All*
- In *Job Status*, select *Finished*
- In *Sub Status*, select *Filled*
- Enter the date range (*Recommended: One month prior to the current date*) of the jobs to verify to make sure jobs were not missed on previous days
- Click *Search*
- Scroll down to view the search results
- With your substitute sign-in sheet for the day that you need to verify, look for substitutes that are showing in a job, but did not sign in on the sign in sheet. Cancel any sub out of the job that did not sign in, don't leave a sub showing <u>as if</u> they worked the job on the system. Before you start to verify jobs, please also look at the finished/filled report for any jobs that don't show on your sign in sheet. Many times a substitute will accept a job late in the morning and will not show up to work, knowing that they may accidently get paid. Also look at the substitute hours and make any corrections and <u>save</u> the changes before starting the verification process. Then you are ready to indicate and verify the jobs that substitutes actually worked (signed in) in either of these two ways:

1. Manually click the checkbox for each job the substitute signed in and the times are correct. When the boxes are checked, Click *Save Verified*.

2. Click *Set All to Verify.* This automatically checks all the jobs checkboxes. Select this only if you have already checked that all substitutes signed in and worked the times showing on the sign in sheet. **It is very important that the report is clean before starting this process to avoid any mistakes.** If there are jobs not worked by substitutes, remove checkmarks for those you do not want to verify by clicking the checkbox and removing the check. Then clean the jobs up by correcting times or cancelling the substitute out of the job; don't leave them showing on the system, as if they worked.

3. When the boxes are checked, Click, **'*Save Verified'*.** The message "*Jobs successfully verified*" appears at the top of the screen. You may have more jobs to verify, so click '*Search'* again until the search says *No Records Found,* then you know that the verification process is complete and the time for substitutes will be loaded into PeopleSoft time and labor in the evening, if you verified before 5 pm on a workday. SAMS interface does not run during the weekend and holidays so you will need to **verify all jobs by 5 pm each evening, before the weekend, holiday or before you leave on vacation**.

When verifying jobs remember to click the '*Save Verified' button*. It is easy to overlook this step after printing the list. Also, it has been noted that the system may only show a portion of the whole list of finished jobs on each page/screen. **Do not forget to click 'Search' again to make sure you are not missing a group of jobs to verify. Follow the same procedure to verify all and hit search again until the system says 'no records found'** as stated above.

WARNING: The 'Set all to Verify' button may seem like a good idea, but if you use it make sure all of the information is correct before you hit the *Save Verified* button. It is easy to accidently verify a job. It is recommended that you verify each job individually by checking your roster and then clicking on the verify box. Once again 'If you notice that data is incorrect, make your corrections, then save and then go back to verify the job.' The system needs each entry to be separate from the other. Make sure you save changes before you verify a job. **If you verify a job by mistake, the system will still pay the substitute even if we cancel the job for you the same day. The same holds true when we change the times on the job.** You will need to cancel the hours or change them in T&L the next day.

NOTE: It is recommended that you run the list of all 'Finished and Filled' jobs backdated 30 days prior to the current date, so that no jobs are overlooked that need to be verified. It is easy to back date a missing assignment and then forget to verify the job later.

Jobs that should not be verified; i.e., due to "substitute no show" or did not work the assignment for any reason, **must be modified by removing the substitute from the assignment immediately.** Please do not cancel the job if it is an absence, the record needs to show for the employee. In other words, if a substitute did not work in the assignment, please remove him by selecting 'Yes' where it asks 'Cancel the assigned substitute?' Select 'No' for calling the substitute, then select the reason they did not work the job. Then press the 'Save' button. If it is a no-show, you may want to process an evaluation form. **Do not leave substitutes in unverified jobs. They shouldn't be left showing in a job as if they worked**.

Hours should not be entered manually, they populate from SAMS. If a job is verified by 5 pm during the work week and the hours did not populate, please call for advice. Sometimes there is a problem with a job and we have to recreate it. We will let you know if we need you to enter hours. Sometimes the hours populate in the correct record, but if you are in a different record, they don't show in the record you are looking at. Double check to see if you are looking in the correct record. You don't want to enter duplicate hours; the substitute will be over paid.

Timekeeping

Verified jobs automatically transfer data from the SmartFindExpress job to PeopleSoft time and labor in the evening of each work day. If you have us cancel the job or correct times after you verify the job, that job information does not over-ride the job data that was showing when the job was verified. You will need to take hours out manually because cancelling the job does not remove the hours from Time and labor. You will have to go back into time and labor the day after the job was verified to remove the reported time. If a visiting teacher works less than a full school day, they are entitled to a full day's pay. All Certificated substitute hours **populate 8 hours by default for a normal school day**. If you notice that hours don't populate for a substitute, watch to see it they post the next day. If that does not happen, please contact the substitute help desk so that we can check out why the hours did not go through. Always run your *Time Summary Report* and check it against your SmartFindExpress job report, it will help you catch the missing hours, or paid hours when the substitute did not work. This will save your school and the district funds.

Timekeeping for Certificated Substitute Positions
All substitutes that work at your site **need** to be in a substitute assignment on SAMS. If they arrive with a job number that is not showing on your report, double check the system to see if an absence was reported late. If your employee works through a special education department, that job is not visible to you and you will need to check with the department or call the substitute help desk for verification. If you have a retired teacher sub working as push in teacher or ELPAC tester, please create a vacancy to get them paid through the system. Hours should never be entered manually into the visiting teacher hourly record in time and labor. Only on rare occasions will hours not populate from a job. If that happens, please call us to see why there was a problem. If you need to hire someone to work hourly at your site, you will need to create an hourly PAR instead of manually entering time into a sub record.

Process of Long-term Pay for Visiting Teachers
Jobs created in SAMS with a <u>short-term</u> reason code will populate into time and labor with the time reporting code of SVT. On the sixth day of the job, you will need to go into SmartFindExpress and change the reason for the (Certificated Only) job to the <u>long-term</u> equivalent. As an example: Day 1-5 would show '1-Illness' and Day 6 and after, should be changed to '5-Long-term Illness'. Any time sent to time and labor for this job will then have the code LVT in time and labor after the change is made. The change needs to be made only once to affect all future time reported on that job. Only certificated substitutes get the long-term rate, so you only need to make the change for them and not classified substitute assignments.

NOTE: If you do not change the SAMS reason to the appropriate long-term reason on the sixth day, you will need to go into time and labor to update the time reporting code and you will need to contact the substitute help desk and have us change the reason to '*Long-term'*. Please remember to track the number of days a substitute has worked and change the reason code on the sixth day.

Timekeeping for Classified Substitutes
Time reported for classified substitute assignments is based upon the actual hours worked at your site, excluding the duty-free half hour lunch. The duty-free lunch is deducted from assignments of 5 hours or more. For example, a substitute that works 6 hours will be paid for 6 hours if the job in SmartFindExpress shows 6 hours and 30 minutes. The classified substitute time starts when the sub signs in. If they come in late or leave early by their choice, please correct the time right away. Classified substitute are not paid long-term rates, so their assignments do not need to be updated to the long-term reason code on the sixth day.

Timekeeping for Substitutes with Multiple Jobs on the Same Day
If a substitute has accepted multiple jobs on the same day, the system only populates hours worked and reported from the first assignment **verified** in the district. Hours from other assignments on the same day **will not populate** automatically. The Timekeeper has to enter those hours in PeopleSoft time and labor manually; it is the only way the substitute can be compensated for the hours worked for that job. That is another reason why timekeepers should check the Time Summary Report; it is a great timekeeper's tool. Many Child Development Assistants, Campus Security Assistants or Extended Day Assistant substitutes work two or three assignments on the same day. Check with them to see if they are working at other sites and how many hours at each. They cannot work more than eight hours total per day. If you find out that they have gone over the 8 hours, please call the sub help desk.

Timekeeping for Employees
Please be aware that absence records **do not populate for employees** from SAMS like payable hours do for substitutes at this time. All timekeeping for employees is entered by the timekeeper at your site

into time and labor manually. Each absence must be reported in time and labor so that SmartFindExpress data matches time and Labor in PeopleSoft. ***Auditors will contact you when they find a discrepancy in their audit reports.***

SPECIAL PROCEDURE FOR ECE (Early Childhood Education): According to ECE rules, once the long-term rate is applied, the time reported for the first 20 days is also subject to the long-term rate. If the SmartFindExpress absence reason is updated on the 21st day, all new time reported on the job number will appear in time and labor with the time reporting code LCCVT, but the first 20 days will need to be updated manually into time and labor to update the code, since those hours have already been sent to time and labor as SCCVT. All Child Development substitute records are under the Time Reporter Group 5830H unlike all other substitutes that show the location code 5998H.

Priority Substitute List
Currently there are three ways a substitute can be a priority (preferred) substitute at a site:
    a. An employee is in a special circumstance status and the district has given them the district priority to be called first on SmartFindExpress.
    b. A site enters their choice of a priority substitute in SmartFindExpress.
    c. An employee requests that their school site enter a substitute on SmartFindExpress to be given priority calls in their absence.

You have access to your site's Priority List on SmartFindExpress. We will delete a substitute from your priority list if they are no longer substituting for the district, we receive a negative evaluation from your site or they are entered and are not qualified for the priority setting based on authorization or classification. If we receive a positive evaluation, we will add them to your priority list. It is recommended that you update the list frequently. You may add or delete substitutes from this list as you wish, but take care when selecting a classified substitute. You will need to select the classification that they worked in an assignment at your site. Do not enter them for everything you want them to do.

To add classified substitutes to your Preferred List, select '*Preferred*' next to *List Type*, then ALWAYS specify the classification(s), i.e., CDA, SET, IA, IBT Clerks, Secretaries, etc. Note: If you select only '*Preferred*' without specifying the classification, the system will **call the classified substitute for certificated assignments**. Please also make sure they are qualified to work the classification you are selecting before entering them on your priority list. The setting will over-ride the classification in their profile, and offer them the assignment when they are not qualified. We are alerted when the assignment shows up on the error report and we can't pay them for working the job.

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

New Priority List
- Select the *New* button
- Enter substitute's access ID or use *Name Lookup* button
- Select List Type from drop-down menu (Preferred)
- Select Classification from drop-down menu or enter the classification code (**mandatory for classified substitutes so that they are not offered certificated assignments that they are not qualified to receive**)
- Select either your site location or employee, but not both

- Enter the sub level if you want the system to call priority substitutes in numeric order of your choice. If you want them all on equal standing, you can leave them all on the default, which is number 1. If the substitute only is willing to teach select classifications, please list a separate priority with each classification. Otherwise they will be offered all certificated jobs at your site.
- Select the *Save* button

Priority Lists Inquiry
- Enter the search criteria or press the *Search* button for all priority lists
- Select List Type from drop-down menu (Preferred, District Priority)
- Select Classification from drop-down menu
- Select Location
- Enter employee's access ID or use *Name Lookup* button
- Enter substitute's access ID or use *Name Lookup* button
- Select the sort order
- Select sort by (default Substitute name) and "then by" sort order
- Select the *Create Report* button for a report
- A report setup screen allows the choice of data to be included on the report
- Select the *View Report* button

Check Your Employee Information on SmartFindExpress
You should check on the accuracy of data and information reported for each of your employees on SmartFindExpress at least once a month and send us a list of changes that need to be made

How to Create an Employee Report/List
- Go to Profile Inquiry/Reports under '*Administrator*'
- Click *Employee*
- Select status *Active*
- Hit the *Search* button and a list of all your employees will show. You can sort by clicking on any column title
- Click on *Create Report* and select the second *View Report* button under the Employee List section, to view the PDF file

Choose the *Profile Inquiry/Reports* link to view and/or print a list of employee pin numbers or run labels for your employees. If you run the report from 'Reports' go to 'Report List' and select Employee List. You can experiment with the Employee Detail Report to get data that you need in different formats. Recommended format is CSV, and then save as an Excel worksheet.

Frequently Asked Questions/Problems

What does SAMS mean?
SAMS originally was called the Substitute Assignment Management System and we often refer to the program as SAMS instead of the newer name SmartFindExpress (SFE)

Why are substitutes not answering the phone when called?
Many substitutes choose to not take calls from the system and search the webcenter instead. Many substitutes choose not to work regularly. Some have other responsibilities (family, pursuing another career, etc.) and they are not able to work regularly. Those that are willing to work are also looking for other employment opportunities and leave the district when they get an offer for a permanent job.

Some substitutes turn off their cell phones so they are not bothered in the early morning.
Some may have blocks by their phone carriers for automated system calls.
When substitutes have not worked in six months, they are blocked from calls. They will be terminated for inactivity soon afterwards.

Why are substitutes not showing up after being booked?
This can happen due to miscommunication between the substitute and regular employee.

- The employee confirms with a substitute and then forgets to report an absence on SmartFindExpress. When the substitute checks the system and has no job number, they take another assignment.
- Regular employee calls in an absence after contacting and confirming with the substitute and makes a mistake of only specifying the substitute instead of assigning the substitute.
- The substitute forgets a previously accepted assignment or doesn't realize that they were assigned a job by the employee or school.
- Substitute accepts a job and goes to the wrong school or believes that it starts another day.
- Substitutes often press the wrong number when responding to the system and then they hang up their phone before hearing that the system is giving them a job number. When that happens, they do not realize that they are placed in a job.

(Please take the substitute out of the assignment if it over an hour after the start time or an hour since they accepted and have not called you. You might want to call them if they haven't showed up in 15-30 minutes or called you if they accepted the assignment late.)

Why am I having difficulty arranging with a substitute?
The following may help:
Contact the substitute and confirm their availability on SmartFindExpress (substitute has to cancel previously accepted assignments, if they are in another job.) They need to have a daily schedule and not entered dates of unavailability. Make sure they have the classification you are entering showing in their profile. Report absences and prearrange with SAMS SmartFindExpress (Listen or look carefully for system responses, such as: absence already reported, substitute not available, invalid Access I.D., etc. When this happens, check with the substitute, but you should contact the substitute help desk and we can figure out why the job cannot be created. Usually we can fix it immediately for you or will advise you otherwise. Please don't ask the substitute to call us; we need to trouble shoot with you.
Realize that a substitute may be blocked by Human Resources or have an expiration date in their profile. You will have to check with the substitute help desk to answer these questions.

How can I block a substitute from calls from my site?
Substitutes cannot be blocked from working at your site by you. The only way to block a substitute from your site is to have your administrator completely fill out an unsatisfactory evaluation form and return it to us immediately. You can find the forms on the district website under Human Resource Forms when you log into the portal.

Human Resources must be notified of an unsatisfactory performance within 10 days of the substitute assignment. If this time limit is not met, the unsatisfactory evaluation will not be valid and cannot be placed in their file, but we can still block the substitute.

Why is the system double booking substitutes?

The system cannot double book two absences for an employee. If two substitutes show up for the same assignment, the substitute that is assigned and confirmed by SAMS / SmartFindExpress with a job number is the recipient of the job. The substitute help desk will confirm the substitute with the assignment and may have another assignment available for the remaining substitute. This error usually occurs when the employee or site contacts the substitute and makes an arrangement with them, but then fails to assign the job in SAMS / SmartFindExpress. If the substitute is not entered as the assigned substitute, the system will call from the substitute pool to fill the absence, which results in two substitutes for the one assignment. Verbal agreements between an employee and substitute need to be discouraged and all employees should be informed that if they are prearranging with a substitute, they need to secure them in a SAMS job that show the substitute as the assigned substitute, not just the preferred sub. If they list a substitute as not confirmed, the system will make an attempt to contact the substitute. If it doesn't reach them, it will open to callout to other substitutes the evening prior to the day of the employee's absence. Give us a call and we can tell you if there is an open job we can offer the substitute that is not in the job. All substitutes are expected to arrive with their job number available.

Sometimes a substitute sees the job in the system and decides to just show up at the site. In the meantime, someone else will pick up the assignment from the system. Advise the substitute to always come with a job number and let them know to search the system for another job. They are not entitled to compensation for showing up.

Why does the system ask for a position number when I am reporting a vacancy with the reason *Vacancy?*

ALL vacancies (with the reason *VACANCY*) reported in SAMS will require the appropriate 8 digit position number from PeopleSoft be entered into SAMS/ SmartFindExpress position number field before the system can create the job so that the substitute is paid from the correct budget. It is important to double check the position number for accuracy to avoid audit issues. Report a Vacancy/Extra help for teachers on district duty, i.e., school meetings, scheduled camps, etc. that require substitute coverage; no position number is needed.

How does a teacher request a visiting teacher when he/she is doing ELPAC testing?

Regular teachers who will be performing the ELPAC testing will need to report their absence from the classroom using the reason code '27 – Testing'. The SAMS/Smartfind Express system will call for a substitute that matches the teacher classification.

How does our site call in a retired visiting teacher to do ELPAC testing?

When your site needs extra support for administering the testing, you must enter it as a vacancy in SAMS/Smartfind Express with the classification of 'T-ELPAC-SDEA Retiree' and the reason code '27 –Testing' for call out. SAMS/Smartfind Express will call retired teachers that have the ELPAC training and the classification in their profile. Only those trained will be called for the assignment. If you have a qualified retired visiting teacher, you can prearrange the assignment. Hours should not be entered manually into the substitute day-to-day record in time and labor. The retired teacher will be paid at the non-classroom teacher rate through SAMS/Smartfind Express and Time and Labor into their non-classroom teacher record, not their substitute teacher day-to-day record. Read more on page 10

Why does our school end up without a substitute when teachers go to professional development?

On professional development days there can be a large need for substitutes throughout the district and it may be harder to fill the assignment. It can be very hard on high absence days such as Mondays and Fridays.

To ensure coverage:
Send a memo to all regular teachers explaining existing absence reporting procedures. Remind them to report the absence early, as soon as they know they will be attending, and that waiting until the last minute will risk not having a substitute to cover for them.
Call or report professional development absences ahead of time to ensure coverage and possibility remind substitutes that they have a job.
Timekeepers can call SAMS or login to SmartFindExpress to review the job and verify whether a substitute has accepted a particular assignment in advance.
Contact your preferred visiting teachers and assign the job if necessary if it is still open.

Why are we having problems filling assignments?
Currently we are hiring fully credentialed visiting teachers, and 30-day emergency permit holders that are student teachers. We try to keep an appropriate number of available substitutes on SAMS. At times when our absence numbers are higher than normal it takes longer and is harder to fill all jobs by a reasonable time. Fridays and Mondays are often our problem days. Our solutions have been:
Recommend to employees to report their absences as soon as possible. By waiting until the last minute to report their absence, the system is over loaded the in the morning.
We monitor and modify the call out on busy days and make adjustments to SmartFindExpress.
We advise timekeepers to check the *Filling Details* button and use the list of phone numbers to call an available substitute or substitutes on their preferred list.
We might advise you to stop the call out for absences due to professional development during extraordinarily busy days to give priority to jobs due to illness and personal emergency. Read the daily announcement to see if it is a high absence day.
Suggest that all sites keep a record of substitutes they can call in an emergency. It is a good idea just in case of a power outage, SAMS is down or we have a high absence rate morning to have a record of current substitutes and their phone numbers.

Why did hours not populate for a substitute?
Sometimes there is a problem with the system or information is incorrect for the employee. This will cause the job to error and it will show up on the SAMS error report. Other times there is a problem with the substitute's record. Usually the problem is fixed quickly, and the job is recreated and verified right away so that the hours can populate. Wait a few days and check again for hours. If it is close to the payroll deadline or you have waited a couple days and the hours are still missing, give the substitute help desk a call for advice.
If the substitute has worked in another job that was verified first before your job was verified, the hours will not populate and will have to be entered manually. Or if anyone has entered hours manually into another record, they system blocks the download.

The system says it is not a work day, what is going on?
The employee's calendar may be incorrect in SAMS or the substitute might not have that day in their profile schedule. If the substitute deleted their schedule in SAMS you can't enter them.
The substitute may have forgot that they entered days of unavailability on their profile
If you choose a weekend or holiday it will not let you select that date.
The employee may need their calendar on SAMS corrected by the substitute help desk.

We may have a summer block on the substitute and is not available.

It may be a 'No Substitute Required Day' and is a part of the SAMS calendar for the first three days of school and the very last day of school when there are no students. The substitute help desk will advise you to enter the substitute into those jobs after the job is finished to over-ride the system. If it is a vacancy to open the first three days of school, create it with the calendar showing 'All Locations' for you to enter the sub or to call out for a sub.

The system says there is an error, why?

Check the reason stated on the screen and give us a call if it something we need to fix. Otherwise try starting over to see if the problem resolves itself. Sometimes it can be as simple as a missing space between the times and am/pm.

Our site has a student teacher, how can they become a substitute for their master teacher?

Ask them to visit the district website and from the home page click on *Apply for a Job* and then click on the link for *Teaching and Substitute Positions*. They will need to create a username and password that should keep on file to login to their application in the future. After they have completed the application, they will need to have your principal contact your Human Resource Officer to request that the student teacher's application be expedited.

Is there visiting teacher training?

Generally, the district does not provide training for day-to-day visiting teachers at this time.

What is a maximum day block on classified substitutes?

Classified substitutes are monitored on the number of days worked in the district. It is referred to as the 195-day rule, but they are blocked at 175 days of work in the current fiscal year. In accordance with California Education Code Section 45103, temporary hourly employees are restricted to working no more than 75% of a regular employee's work days, which includes the holiday breaks, during the fiscal year from July 1 through June 30. 195 days includes holidays and sick leave days, so when the substitute reaches 175 days worked, they are blocked from receiving calls and cannot be entered into assignment until the new fiscal year begins on July 1.

What is prep period pay?

Visiting teachers are entitled to one (1) hour of pay for each prep period that they work for a different teacher after the **FIRST** period worked each year. SDEA agreement says visiting teachers must keep a signed Union form as proof that they have worked the one prep period. When they are asked to work the second prep period and every time afterward for the current year, they will provide a copy of the form to the site timekeeper to be compensated one hour. The copy of the form stays with timekeeping at the site. Refer them to the SDEA website.

Reminders for School Secretaries and Timekeepers

- It is the responsibility of the regular employee to report absences in SAMS. If the employee can't or does not report their absence, it becomes the site's responsibility to enter it into SAMS. It is mandatory that all absences are reported in SAMS and all substitutes have a job number for each assignment worked for auditing purposes. Employees can report their absence for the current day or the future. If they forget, they *cannot* back date their absence; you will have to enter it in SmartFindExpress for a record of their absence. Keep employee guides in the office to refer your employee to, when they are have a problem reporting their absence. Have them follow the guide before having them call us.

- Newly hired employees are often paid through a substitute record and need stay in a long-term sub assignment until a PAR is completed and they are showing as a monthly employee at your site. No absence should be reported in SmartFindExpress for an employee that is assigned to an incorrect location. If that employee requires a substitute, open a vacancy. A position number will be required when a vacancy is reported. If you notice an absence on your report for an employee not at your site, please contact the substitute help desk and we will fix the problem and make the necessary changes so that the absence shows at the correct location. We will cancel the assignment and recreated it.

- When a PAR (Personnel Action Request) is generated for a new position, any additional information pertaining to the assignment, i.e., classification, grade level, work schedule, etc. will be very useful for us when we enter your employee's data in SAMS.

- It is a good idea to run a report for assignments for the next day or week to check if the times and data entered are correct.

Important: Do not ask a substitute to report to the site without being assigned to a job number, verifiable through SAMS. Only during emergencies or when the computer or system is down should you ask a substitute to come without a job number. Please inform your employees to follow the same procedure. This will avoid problems with having a substitute come to your site that may not be qualified to work for any various reasons or prevent a double booking. If a substitute sees or hears of an open assignment, they need to call the site to ask if you would assign the job to them. If you need them to work and want them to have the assignment, you must stop the callout, wait until it stops completely and then assign it to them. If you are having a problem assigning the substitute, contact the substitute help desk immediately for assistance. Failure to stop the callout and assign the job, often results in two substitutes showing up and then you will need to compensate one of them. The situation is easily avoided by your assisting the caller immediately.

- Extend assignments before the expiration date, making sure that the correct days of the work week are checked. This will save you time re-starting the assignment and securing a new job number.

- Track the number of days a certificated sub has worked in the same classroom. If the certificated job goes over 5 days, on day 6 change the reason code to long-term in SAMS.

- When leaving a message for the Substitute Management Desk, give important information needed to process your request, such as job number, employee or substitute ID, name, phone number, etc. We will have the system ready to assist you when we call back to help you.

- When calling the substitute help desk, please avoid putting us on hold. It is a call center with other sites waiting to get through, we cannot wait on hold. Give us another call when you are free. If we are put on hold, we might have to hang up if it takes very long for you to get back to us. SAMS operators have large range of duties that include a lot of data input. Please refer to this guide before calling the substitute help desk. Please also have the job number, and employee ID number.

- During critical times, i.e., when SAMS may be down for maintenance, or showing considerable number of unfilled assignments, you might need to stop callout for jobs due to professional development and extra help to give time for the system to fill assignments due to illness, personal emergency, etc. Although SAMS will continue to call substitutes until 11:55 am, it will help if you manually call substitutes off of a priority list kept on hand for emergencies. If you no longer want the system to call for a substitute later in the morning, go in and click on *Stop Call.*

- Certificated substitutes are entitled to a full day pay for partial day assignments. If a substitute shows up at the school site with a valid job number and finds she/he is no longer needed, the substitute help desk will assist in finding the substitute another job. If there is nothing available and their job was cancelled, the school will need to create an extra help vacancy assignment for full day compensation.

- Certificated assignments populate 8 hours by default in PeopleSoft time and labor no matter how many hours are showing on the SAMS job. If the assignment is less than the normal school day, they are still paid the full day. If a substitute works on a minimum day, the teacher can leave instructions for additional work or you can assign normal duties to finish out the school day. They cannot perform regular clerical duties. If they are extremely late or decide to leave early, please use the evaluation process to document the issue and they will be blocked from your site.

- Time worked for classified assignments populate in time and labor the actual number of hours showing in SAMS, minus 30 minutes of duty-free lunch from assignments that are five (5) hours or more. If they are late or take the job late, the start or end time should be modified immediately. If a classified substitute shows up on time for the full day and it is a minimum day they should be paid for the time that was showing on the job when they accepted the assignment even if you release them early.

- A classified substitute is expected to work the times showing on their job. If a substitute decides to leave early, then you can modify the end time.

- If you suspect that a classified substitute signed in but left the campus without working, please check the classroom teacher and report to us what happened, if they did not work. We strongly recommend using the evaluation process to stop this type of situation

Note* Do not use the browser's back button to navigate to screens. Navigation buttons are on the bottom of SmartFindExpress screens, such as the *Return to List* and *Continue* buttons.

VERY IMPORTANT!!! Check the SmartFindExpress announcement page every morning for new messages from the substitute help desk so that you know what is happening in the district. If you are not getting the Time and Labor emails from payroll, please call them to get set up on their email list.

Frequent Request:
Employees want to substitute during their breaks and vacation or partial days or if they work part time. Certificated employees need to fill out a visiting teacher application and classified employees should call in their request so that we can create substitute assignment in PeopleSoft and SAMS.

HUMAN RESOURCE DIRECTORY

General Phone Line	**(619) 725-8000**	**HR Fax**	**(619) 296-7522**
Certificated Hotline and		**SAMS and Input Fax**	**(619) 686-6650**
Classified Hotline	**(619) 725-8101**	**IT Help desk**	**(619) 209-4357**
SAMS Help Desk	**(619) 725-8090**		

PAR Routers
Norma Velazquez - Central Office
Vacant - Areas 1, 2, 3 CDC and Charters
Norma Prado - Classified and Certificated Management
Vacant Position - Areas 4, 5, 6 and Special Education

Certificated and Classified Personnel Guidance & Support Teams

Area 1 Counseling & Guidance, Children in Youth Transition, Home Hospital, LGBTQIA, SANDAPP, Family & Youth Advocacy, PE, ASB, Nursing & Wellness, Labor Relations	Mary Wager, HR Officer mwager@sandi.net	Roxanna Garcia, Confidential Admin Asst. (619) 725-8109
Area 2 ADA/504, Due Process, Mental Health Resource Center, Special Ed Admins, Specialized Settings, Specialized Services, Early Childhood Special Education	Leighty, Ryan, HR Officer rleighty@sandi.net	Jeane Kline, Confidential Admin Asst. jkline@sandi.net (619) 725-7752
Area 3 Instructional Materials & Resources, CCTE, JROTC, Adult Ed, Translation Services, Board Services	Ann Cato, HR Officer acato@sandi.net	Jeane Kline, Confidential Admin Asst. jkline@sandi.net (619) 725-7752
Area 4 Neighborhood Schools, Charter Schools	Marvin Castillo, HR Officer mcastillo3@sandi.net	Stacy Boland, Confidential Admin Asst. sboland@sandi.net (619) 725-8108
Area 5 Special Ed Schools, Finance, Integrated Technology, Payroll/Benefits	Stephanie Kennedy, HR Officer skennedy1@sandi.net	Stacy Boland, Confidential Admin Asst. sboland@sandi.net (619) 725-8108
Area 6 Office of Language Acquisition, Assessment Services, GATE, Instructional Supports, Magnet School Grant, Title 1 Services, Family Engagement, Facilities and Planning	Josue Diaz, HR Officer @sandi.net	Roxanna Garcia, Confidential Admin Asst. (619) 725-8109
Operations Office; Physical Plant Operations, Food Service, School Police, Alternative Schools, VAPA, Early Childhood Ed.	Litta Buras, HR Officer lburas@sandi.net	Rhonda Archard, Confidential Admin Asst. rarchard@sandi.net (619) 725-7132
HR Supervisor- Verification of Experience, VT recruitment, SAMS	Darin Noyes, HR Services Supervisor	dnoyes1@sandi.net (619) 725-8019
Credentials, HQT, Certifications Names M-Z	Jose Delao, Credential Specialist	jdelao@sandi.net (619) 725-8008
Credentials, HQT, Certifications Names A-L	Cecilia Galvez, Credential Specialist	cgalvez@sandi.net (619) 725-8105
Certificated/Teacher Salary Placement Review	Eileen Sandifer, Certificated Salary Specialist	esandifer@sandi.net (619) 725-8042
Leave of Absences; Catastrophic Leave/Donations, Certificated On-Loan	Gloria Rangel, HR Specialist	grangel@sandi.net (619) 725-8172

Personnel Action Request (PAR) Personnel Data Input; New Hire Processing, Substitute Services, Fingerprinting	Krista Conn, HR Services Supervisor	kconn@sandi.net (619) 725-7714
Substitute Assignment Management System Lead	Lynda Ensign, HR Specialist	llawrence@sandi.net (619) 725-8051
Personnel Files/Records	Sharon Frederitz, Personnel Clerk	sfrederitz@sandi.net (619) 725-8044
Principal/ VP Recruitment Classified Summer School Staffing Employee Testing, Recruitment Support	Yolanda McKnight, HR Specialist	ymcknight@sandi.net (619) 725-8067
Recruitment, Employee Testing and Staffing, New Hires	Patty Duran, Personnel Analyst	pduran1@sandi.net (619) 725-8103
Recruitment, Employee Testing and Staffing, New Hires	Shelly Frazier, Personnel Analyst	sfrazier1@sandi.net (619) 725-7051
Recruitment, Employee Testing and Staffing, New Hires	Alejandra Inzunza, Personnel Analyst	(619) 725-8102
Classification Review, Salary Placement	Jackie Bello, HR Analyst	jbello@sandi.net (619) 725-8068
Recruitment	Michelle Johnson, HR Specialist	mjohnson11@sandi.net (619)725-8040
Classification Review and Compensation, Salary Schedules Support; Investigations	Rebecca Lee, Lead HR Analyst	rlee3@sandi.net (619)725-8030
Re-classification Review and Compensation, Salary Placement	Sam Scaife III, HR Analyst	sscaife@sandi.net (619)725-8052
Fingerprint Input and General Input	Susie Schaefer, Data Clerk	(619)725-8255
Verification of Experience, PAR Router Areas 1, 2, 3	Vacant Position, Personnel Clerk	(619)725-8036
Verification of Experience, PAR Router for Central Office	Norma Prado, Personnel Clerk	(619)725-5515
Processing and Fingerprinting	Lisa Padelford, Personnel Clerk	(619)725-8106
New Hire Processing	AnaMaria Ayub, HR Data Clerk	(619)725-8011
New Hire Processing	Shirley Cunningham	(619)725-8034
Classified Input	Kimberley Hatchell-De La Rosa, Data Clerk	(619)725-8121
SAMS Operator	Vacant, Personnel Clerk	(619)725-8090
SAMS Operator	Vacant, Personnel Clerk	(619)725-8090
SAMS Operator	Klaudia Poggio, Personnel Clerk	(619)725-8090
Certificated Input	Kristy Le, HR Data Clerk	(619)725-8061
Certificated Input	Jeff Romero, HR Data Clerk	(619)725-8063
Classified Input	Kimberley Hatchell-De La Rosa, Data Clerk	(619)725-8121

Substitute Assignment Management System (SAMS) SmartFindExpress
(619) 297-0304
24 hours a day / 7 days a week
Monday-Friday 6:30 am to 4:00 pm
Substitute Help Desk (619) 725-8090
Fax: (619) 686-6650   Email: subhelp@sandi.net

Administrator/Timekeeper Training
Sign up for Time and Labor training if you are new to your position or need a refresher at:
https://ero1.eschoolsolutions.com/user/login.taf?orgid=92103

Instructional Material:
Instruction brochures (*Quick Reference Cards*) can be found on our website at:
https://www.sandiegounified.org/substitute-and-visiting-teacher-resource-site

Guides for using the webcenter are found under *Help* when logged into SmartFindExpress

Job aids for timekeepers are on the Payroll website at:
https://www.sandiegounified.org/timekeepers-payroll-resources

Human Resource forms can be found when logged in to the portal at:
https://www.sandi.net/staff/human-resources/human-resources-forms

QUICK REFERENCE PHONE NUMBERS

Education Center (General Information)	(619) 725-8000
Certificated Hotline	(619) 725-8101
Classified Hotline	(619) 725-8101
Credentials	(619) 725-8039
Employee Benefits (Medical Insurance)	(619) 725-8130
ERO Issues	(619) 725-7532
IT Help Desk	(619) 209-4357
Performance Evaluation Issues Certificated	(619) 725-8019
Performance Evaluation Issues Classified	(619) 725-7714
Visiting Teacher Help Desk	(619) 725-8090
San Diego Education Association (SDEA)	(619) 283-4411
California School Employees Association	(858) 458-0300
Worker's Comp	(858) 627-7439

PAYROLL DEPARTMENT CONTACT NUMBERS

Main Number: (619) 725-7736
Fax Number: (619) 686-6729

Hourly Substitutes (Alpha Last Name)

Subs: A – P	725-7729	Megan Hampton	mhampton@sandi.net
Subs: Q – Z	725-8146	Catherine Dickens	cdickens@sandi.net

Garnishments / Workers' Comp / Direct Deposit:

Wage Withholding Orders	725-8009	Charles Nassau	cnassau@sandi.net
Workers' Compensation	725-8146	Catherine Dickens	cdickens@sandi.net
Direct Deposit: A – Z	725-7736	Tabatha Rodriguez	trodriguez1@sandi.net

How to Create a Current Day Absence Report

- Click on Job Inquiry/Report and change the sort order from 'Job #' to 'Substitute Name' and hit Search
- Click on Create Report and de-select all information unnecessary for your report
- Click on select Print a signature line.
- Click on View Report and print report for your sign in sheet.
- Data can change during the morning but run another report later to check for updates or missing information.

How to Create the Finished and Filled Report

- Select *Job Inquiry/Reports*
- In *Job Type*, select *All*
- In *Job Status*, select *Finished*
- In *Sub Status*, select *Filled*
- Enter the date range (*Search From* date and *To* date) Past 30 days
- Click *Search*
- Scroll down to view the search results.

How to Create a Past Day Absence Report

- Click on Job Inquiry/Report
- Enter date range search
- Enter Job Status Finished and Verified
- Click on 'More Search Options' to define your search
- Hit Search
- Click on Create Report and de-select all information unnecessary for your report
- Click on View Report and print report.

 You can bring up all of the absences for one employee, a group or all of your employees for a period of time.

How to Create the Employee Report List

- Go to Profile Inquiry/Reports
- Click on Employee Inquiry Tab
- Select Status "Active" button
- Hit Search Button and a list of all employees will show. You can sort by clicking on any column title
- Click on Create Report and select the second View Report button under the Employee List section to view the PDF file

From this report screen you can print a list with the data checked that you would like, above the first View Report button or create labels from the last View Report button. This is an excellent feature!

How to Create a Future Day Absence Report

- Click on Job Inquiry/Report
- Enter date range search and hit Search
- Click on Create Report and de-select all information unnecessary for your report
- Click on View Report and print report.

How to Create an Announcement

From the link 'Announcements' you have the ability to create an announcement for employees or substitutes. Click on 'New' in the Announcement section; select the type and language and Type in your announcement. This will so for all of your employees when they log in and the substitute announcement will show in the assignment. This is an excellent feature! You may also post the same announcement on the phone system. You need to call 619 297-0304, enter the 8-digit access number and the 6-digit pin. (If there is an announcement already posted, you will hear that first.) Press 6 to create the announcement. Follow the prompts until you are finished.

Sub for Report a 'Sub for a Sub' on SmartFindExpress

Substitutes cannot order a substitute for themselves like a regular employee. They should not cancel out of their long-term job. They will need your assistance in modifying their currant/future job as the following examples show:

<u>'Sub for a Sub' for the current day.</u>
--Modify the long-term assignment to start on the day the long-term substitute will be back. Important: Click "Save" and verify that dates are correct.
--Create an absence or open a vacancy for the day(s) the long-term substitute will need a "Sub for a Sub". Match job information with those on the original job.

<u>'Sub for a Sub' needed at a future date.</u>
--Modify the long-term assignment to end on the last day the long-term substitute can work. Important: Click "Save" and verify that dates are correct.
--Create new absence or vacancy for the day(s) a "Sub for a Sub" is needed.
--Re-create the absence or vacancy to start from the day the long-term substitute will be back on the long-term assignment. Match job information with those on the original job. Be sure to prearrange the job with the long-term substitute.

<u>'Sub for a Sub' for a long-term substitute scheduled to attend training.</u>
--Create a vacancy and select Professional Development, Code #26 as the reason. No change is to be made on the existing long-term assignment. The substitute will be paid as a normal substitute work day.