CATHOLIC DISTRICT SCHOOL BOARD OF EASTERN ONTARIO

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SMARTFIND*EXPRESS*

Occasional Employee Quick Reference Guide

Access ID: This is your employee number (found on your pay receipt)

Temporary PIN: As a new user, this is your employee number

New PIN: (Please write down your PIN) _____

SFE System Phone: 1-844-802-5280

CDSBEO SFE Help Line: 1-613-714-6370 Monday-Friday 7am-3pm

Web Browser URL: www.cdsbeo.eschoolsolutions.com

TELEPHONE ACCESS INSTRUCTIONS

THE SYSTEM CALLS SUBSTITUTE EMPLOYEES DURING THE FOLLOWING TIMES:

Monday – Friday: 6:00am – 10:00am (today's jobs only)

Monday – Thursday: 5:00pm – 10:00pm (future jobs)

Sunday: 5:00pm – 10:00pm

DECLINE/CANCEL REASONS:
1. Not Qualified
2. Personal Illness
3. Work Schedule Not Compatible
4. Working Outside of CDSBEO
5. Personal Appointment
6. Lack of Child or Dependent Care
7. Family Emergency
8. Bereavement
9. Inclement Weather
10. Alternate Assignment within CDSBEO
11. Quarantine
12. Other Reason Not Listed
13. Admin Use Only: Substitute No Show
14. Admin Use Only: Substitute Reassignment
15. Admin Use Only: Student Absent

Before any features are available or before the system will call for casual jobs, you must PHONE in to register with the system and change your PIN. The Access ID and PIN are used for all interactions with the system.

REGISTRATION
1. Enter your **Access ID** followed by the star (*) key
2. Enter your **Access ID** again when it asks for your PIN followed by the star (*) key
3. Record your name followed by the star (*) key
4. Hear your callback #. Correct if necessary.
5. You will be asked to select a new PIN. Passwords must be minimum 8 characters in length with minimum one alphabetic and one numeric or special character.

TELEPHONE ACCESS INSTRUCTIONS

1. Enter your **Access ID** followed by the star (*) key
2. Enter your **PIN** followed by the star (*) key

THE SYSTEM CALLS
Note: At any time during a call from SFE, you may select the star (*) symbol to place the system on hold to allow yourself time.

HEAR THE JOB OFFER
1. **PRESS 1** to Hear the job offer
   PRESS 2 to Set temporary Do Not Call
2. If you **pressed 1** to Hear the job offer
   PRESS 1 to Hear the job description
   PRESS 2 to Decline the job (without hearing the description)
       Enter the decline reason from page 1 followed by the star (*) key – pressing the star (*) following the decline reason is required to successfully decline a job.
3. If you **pressed 1** to Hear the job description
   PRESS 1 to Accept this job
       Record the Job Number. You are successfully assigned to the job.
   PRESS 2 to Repeat the job description
   PRESS 3 to Decline the job
       Enter the decline reason from page 1 followed by the star (*) key - pressing the star (*) following the decline reason is required to successfully decline a job.
       PRESS 1 to Accept
4. If you **pressed 2** to Set temporary Do Not Call, hear a time offered
       PRESS 1 to Accept the time offered
       PRESS 2 to Enter an earlier time in HH:MM format.

HEAR THE CANCELLATION
1. Hear "This assignment has been cancelled" and the job information
2. **PRESS 1** to Repeat the job information

CALLING THE SYSTEM

MENU OPTIONS
1 - Review or Cancel Assignments
3 - Change your Callback Number
4 - Review or Modify Temporary Do Not Call Time
5 - Review or Modify Unavailability Dates
6 - Review or Modify Daily Availability
7 - Change PIN or Re-record Name
9 - Exit and hang-up

REVIEW OR CANCEL ASSIGNMENTS
1. Hear your assignments in chronological order
   PRESS 1 to Hear assigned job information again
   PRESS 2 to Cancel this assigned job
2. If you **pressed 2** to Cancel assignment
   PRESS 1 to Confirm cancellation (Enter cancellation reason followed by the * key)

CHANGE YOUR CALLBACK NUMBER – only one number can be entered.
1. Hear the Callback telephone number
   PRESS 1 to Modify callback telephone number
2. Enter new telephone number followed by the star (*) key.

TO CHANGE PIN or RE-RECORD NAME
1. **PRESS 1** to Change your PIN
2. **PRESS 2** to Change the recording of your name

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN

Open your browser www.cdsbeo.eschoolsolutions.com to access the SmartFind*Express* Sign In page. Enter your Access ID (employee number) and PIN (the password you created when you registered by telephone).

You will be asked to change your digit PIN to a password containing numbers, letters & symbols. A link will be emailed to the address listed in your SFE profile. Please check all email accounts (CDSBEO & personal) prior to emailing the SFE Operator. The digit only PIN will still be used for telephone access.

SINGLE SIGN ON

Effective October 2020 a *single sign on* feature was introduced to SFE. Once registered by telephone, most employee profiles are set up, allowing the employee to select "CDSBEO Sign In" without having to enter their Access ID (Employee Number) and Password to access SFE.
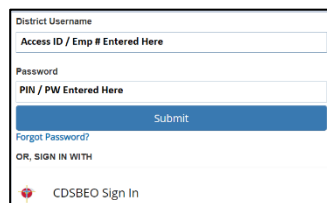

If the *single sign on* feature has not been enabled, the employee will login by entering their Access ID (employee number) and PW. The first time the employee logs into SFE, they are to select "Forgot Password". This will prompt SFE to send the employee an email with a password change link. This newly created password will be used for computer login only. The PIN number (created when the employee registered by telephone) is to be used when using SFE by phone.

PIN REMINDER

If the employee profile does not have the SSO feature enabled. The "Forgot Password" link supports users who want to log into the system but have forgotten their PIN. When this link is selected, the system will email to the email listed in your SFE profile. If the employee does not recall what this is, check all email accounts (CDSBEO & personal) prior to emailing the SFE Operator.

*The SFE Operator cannot view or edit the employee's password

PROFILE
Information
- Review personal information, change email, change computer password, change telephone PIN, Confirm Address (contact hr@cdsbeo.on.ca if your address is incorrect). Callback number

My acknowledged notifications
- Review a list of SFE updates

SCHEDULE
General
- **Modify an Availability Schedule**
  ° Choose day or days of the week you want to delete by checking the boxes by that day and select the *Delete* button. This schedule is re-set annually to 5 days/week by the CDSBEO SFE Operator.
  ° Select the *New* button to add a new day of week or time. Follow the steps for "Create a New Availability Schedule" as outlined above

Temporary Do Not Call
- Update your email

- Change the telephone number where you can be contacted by the system. Include the '1' (long distance indicator) and area code
- Specify a temporary "Do Not Call Until" time if you do not want to be called by the system. Please do not use the Block Call feature. Please add unavailability dates instead.

Classifications and Locations
- Review classifications and locations you have chosen for assignments ~ only the SFE Operator can make changes to this.

Unavailable Dates Tab
- **Create Unavailability Schedule**
  ° Select the *New* button
  ° Enter Start and End Date Range (MM/DD/YYYY) or use the calendar
  ° Select the *All Day* check box or enter the time range in HH:MM am or pm format
  ° Select the *Call for Future Assignments* checkbox, if during the unavailable time period entered you would still like to receive calls for future assignments. Leave box unchecked if you do not want any calls during this time
  ° Select *Save* button

REVIEW ASSIGNMENTS
Choose the *Review Assignments* link to review past, present, and future assignments or to cancel a future assignment

Follow these steps:
- Select format for Assignment display. List or Calendar view
- Search for assignments
- Press the *Search* button to display the list of assigned jobs
- Choose the *Job Number* link to view job details
  ° Select the *Return to List* button to review other jobs assigned to you
  ° Select the *Cancel Assignment* button to cancel your assignment. Enter a reason for canceling from the pull down list. Wait for the "Job was cancelled successfully" notification. Substitute employees cannot cancel themselves from assignments within 1 hour of the start time.
  ° An assignment may contain file attachments. To view or download a file attachment, click on the file name.

SIGN OUT AND WEB BROWSER INFORMATION
At any time during the session, the *Sign Out* link can be selected to end the session and disconnect from SmartFind*Express*. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFind*Express*.

To ensure security and privacy of information, use the *Sign Out* link to disconnect from SmartFind*Express,* and close the web browser when you finish with your session.

You can click the Help link to access Help Guides and How-to videos.

Important Note: *Do NOT use the browser's BACK button to navigate to screens.*
Navigation buttons are on the bottom of SmartFind*Express screens, such as the Return to List and Continue buttons.*

Applicable to Occasional Teachers Only:

Locations
To change your school selections, please log into the https://CDSBEO.SharePoint.com website to edit your Occasional Teacher Application form. Make the changes and select save. Once you save the application, Human Resources will receive notification that the application has been updated and your changes will be uploaded into SmartFind*Express*.

OCT Qualifications
Should your OCT Certification of Qualifications change throughout the school year, please attach the updated copy to your Occasional Teacher Application form on the https://CDSBEO.SharePoint.com website. Once you save the application, Human Resources will receive notification that the application has been updated and if necessary, your qualifications will be uploaded into SmartFind*Express*.

Attachments to Jobs (ie: Lesson Plans)

To access attachments the employee has included in the job you have accepted, you are to log into SFE. Select "*Review Assignments*".   Select the *Calendar Radial Button*. You may leave the date fields blank. Select "*Search*". This month's calendar will open. Select the job number on the date you are inquiring. The job details will open and you find a link that will open the file attachment.

Applicable to Occasional Non-Teaching Only:

To change your school selections, please email CasualNTEmployee@cdsbeo.on.ca