

San Diego Unified School District
Substitute Management Unit

SAMS / SmartFindExpress
Updates and Clarifications

This packet includes updated information and clarifications that will assist you in getting answers to your questions pertaining to absence reporting, substitute assignment and timekeeping.

Included are three sections:

Section one:	Guidelines for School Secretaries and Timekeepers
Section two:	General Updates and Clarifications
Section three:	Directory

We hope that the information will provide answers to specific questions you have as you work with SAMS / SmartFindExpress. If you have questions that are not covered in this packet, please call Human Resources (Refer to the Directory).

Section One

GUIDELINES FOR SECRETARIES AND TIMEKEEPERS

SAMS / SmartFindExpress Operation

1. Registering with SAMS

It is important for new employees to register into SAMS as soon as possible to receive their personal identification number (PIN). This will activate them in SAMS and allow them to report absence information when necessary.

2. Filling the same day absence after the call-out 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. (Call-out period is 05:00 a.m. – 11:55 a.m.) This will help fill absences that occur late in the morning or afternoon. If an absence is reported at 11:55 a.m., the system will continue to call for a substitute until the first half of the assignment is over. **If you have late absences or want the system to continue for a particular assignment after 11:55 a.m., change start time to an approximate time when you'd like SAMS to restart callout.**

IMPORTANT!!! It is mandatory that all absences are reported in SAMS and all substitutes have a job number for each assignment worked.

Under no circumstances should a school allow a substitute to work without a current job number verifiable through SAMS.

3. Priority List

There are three ways a substitute can be a priority (preferred) substitute at a site:

- 1) A school designates names of substitutes on SAMS / SmartFindExpress to be given priority for any assignment at their sites.
- 2) An employee designates names of substitutes on SAMS / SmartFindExpress to be given priority for assignment in their classroom.
- 3) An employee or school can request a specific substitute when they call in their absence by entering the substitute's Access I.D. (Employee I.D) in SAMS / SmartFindExpress.

Note : You have access to your site's Priority List on SAMS / SmartFindExpress. You may add or delete substitutes from this list. To add preferred certificated substitute, you may either specify the classification(s) the substitute is willing to work, or simply choose "Preferred List" for the substitute to be called for any certificated assignment.

To add classified substitutes, specify the classification(s) as CDA, SET, IA, IBT, Clerks, Secretaries, etc. Do NOT select "Preferred List". If you do, the system will call classified substitutes for certificated assignments.

4. Declining and Canceling a job

- When a substitute cancels out in the morning of the assignment, the substitute is instructed to call the school to inform them of the cancellation. **SAMS may not be able to refill an assignment when the substitute cancels the same day of the assignment.**
- Substitutes are encouraged to accept assignment from all geographical locations in the district. They have the option, though, 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 assignments. When a job is cancelled, there is an option for the system to call the assigned substitute to inform him/her about the cancellation.

Decline/Cancellation Codes:

- #1 Not qualified for the assignment**
- #2 Illness – personal**
- #3 Illness – family or no child care**
- #4 Transportation problems**
- #6 Personal Business**
- #7 Working elsewhere / within the District**
- #8 Working elsewhere / outside the District**
- #9 Other reasons**

5. Reporting a "Sub a for a Sub" on SmartFindExpress

a. "Sub for a Sub" for current date.

--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.

b. "Sub for a Sub" needed at a future date.

--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.

c. "Sub for a Sub" for a long term substitute scheduled to attend training.

--Create a vacancy and select Professional Development, Code #26 as the reason. No change is to be made on the existing long term assignment.

Notes ...

- SAMS / SmartFindExpress will assign classified substitutes to match employee assignment/classification. If the assignment is long term and the substitute is performing the full range of duties of higher level of classification, a PAR can be submitted to Human Resources. The Classification and Compensation Unit will review the PAR and determine salary level.
- There are classified employees that do not require a substitute. When they register to get a PIN number, they will hear school site support as their classification. They were entered into SAMS as "no substitute required", which means **no** substitute will ever be called to cover the absence.
- Check on the accuracy of data / information reported for each of your employees on SmartFindExpress. Navigation: **Profile Inquiry / Reports**; click **Employee Inquiry** tab; select **Active** status; select **Create Report**; click **View Report** under **Employee list** (bottom of the page). Report any incorrect data, ie, work schedule, classification, location, etc. to the Substitute Management Desk.

Frequently Asked Questions

1. Substitute refusing to work when called

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 more permanent job.

2. Substitute not showing up after being booked

This can happen due to miscommunication between the substitute and regular employee.

- The regular employee confirms assignment with substitute and forgets to report assignment on SAMS / SmartFindExpress. When substitute calls the system and finds no job#, takes other assignments.
- Regular employee calls in an absence, contact and confirms with substitute and makes a mistake specifying the substitute instead of prearranging assignment. SAMS calls out when the specified substitute does not respond or take the assignment after a certain period of time.
- The substitute forgets a previously accepted assignment.

3. Difficulty in the process for arranging substitutes

The following may help:

- Contact the substitute and / or confirm availability on SAMS / SmartFindExpress (visiting teacher has to cancel previously accepted assignments, if there are any.)
- Confirm acceptance of the assignment by the substitute.
- Report absences and prearrange with SAMS / SmartFindExpress (Listen carefully for system responses, such as: absence already reported, substitute not available, invalid Access I.D., etc. When this happens, contact Substitute Management Desk @ (619) 725-8090 / 8089)

4. Blocking a substitute from calls

Substitutes can be blocked from working at a site. The only way to block these substitutes from a site is by an administrator completing an unsatisfactory evaluation form with instructions not to return. **Substitutes must be notified of an unsatisfactory performance within 10 days of completing the assignment. If this time limit is not met, the unsatisfactory evaluation will not be valid.**

5. Double booking

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 Help Desk will confirm the substitute with the assignment and may have another assignment available for the other substitute. This error usually occurs when the employee or site contacts the substitute and makes arrangements with them to cover an absence, but fails to prearrange assignments with 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 one assignment.

Guidelines for School secretaries and timekeepers

- It is the responsibility of the regular employee to report absences in SAMS / SmartFindExpress. In some cases, it becomes the school's responsibility.
- Substitutes stay on their long term assignment until a PAR is completed and the substitute is officially a regular / monthly employee assigned to your site in PeopleSoft. No absence should be reported in SAMS/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.
- When 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 in entering your employees' data in SAMS.
- **Important:** Do not ask a substitute to report to the site without a current job number verifiable through SAMS.
- 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.
- When leaving a message to the Substitute Management Desk, leave important information needed to process your request, such as job number, Employee ID, name, phone number, etc.
- During critical times, i.e., when SAMS may be down for maintenance, use your school's preferred list and call substitutes manually off of a list kept on hand for emergency.
- Substitutes are entitled to a full day pay for short-term assignments unless notified before assignment starts. If a substitute shows up at the school site with a valid job number and finds she/he is no longer needed, the Substitute Management Desk may assist in finding the substitute another job. If there is nothing available, the school will be charged for at least two hours of substitute pay.
- Time worked for certificated assignments populate PS T&L for 8 hours by default. If the assignment is less than full day, adjustment has to be made on PS T&L. Time worked for classified assignments populate PS T&L with actual time worked from SAMS, minus 30 minutes of duty-free lunch from assignments that are 5 hours or more.
- To be sure that a substitute is qualified to work certain classifications / assignments, check PeopleSoft's listing of substitute assignments.

- Be supportive of substitutes. Like every one of us, they play an important role in the school system.
- For your convenience, SAMS / SmartFindExpress brochures are available to provide step by step instructions in using the system. Feel free to stop by and pick up a brochure at the Education Center; call the Substitute Management Desk to have one mailed to you, or print them from the Substitute and Visiting Teacher Resource website listed on this brochure.
- **IMPORTANT!!!** Read the SmartFindExpress announcement page daily for the most updated information related to absence reporting, substitute assignment, timekeeping and other subjects requiring immediate attention.

Administrator / Timekeeper Training

SADIE is the Interactive web-based training that can help you learn to use SmartFindExpress at your own pace and refresh your skills on specific functions of the system whenever you choose. Find SADIE at:
<http://www.sandi.net/personnel/subs/index.htm>

Under "Online Training", Click / Open "Administrator"

SADIE ADMINISTRATOR LOGIN:

User name: administrator

Password: sfxadministrator

Section Two

GENERAL UPDATES AND CLARIFICATIONS

SAMS Operation

1. Visiting Teachers on Long-term Assignment

- A long-term visiting teacher who is requested to return 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 of 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)

- Long term visiting teachers shall 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. Please see the SDEA contract; page 140, Article 33, Section 33.2 for clarification.

3. Credential Information

Visiting teachers with 30-day emergency permits are not eligible to teach over 30 work days for any one teacher during the school year. In addition, no visiting teacher is eligible to teach a Special Education Class for any one teacher for more than 20 workdays. 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 staffing administrator.

Frequently Asked Questions

1. Reporting a vacancy

ALL vacancies (with reason of VACANCY) reported in SAMS or SmartFindExpress will require appropriate 8 digit position number from PeopleSoft be entered into SAMS/ SmartFindExpress "Position Number" field before the system will accept the Visiting Teacher request. Correct Position #'s for site(s) may be found in the PeopleSoft HR Allocation Status Report. You may also find the instructions to run this report @ http://www.sandi.net/personnel/subs/pdf/Allocations_Status_Rpt.pdf

Report a Vacancy / Extra help for teachers on district duty, ie, school meetings, scheduled camps, etc., requiring substitute coverage.

2. The school ends up without a substitute when teachers report to staff development without confirming that a visiting teacher is assigned.

To ensure coverage:

- Send a memo to all regular teachers explaining existing **absence reporting procedures** for your site.
- Timekeepers can call SAMS or login to SmartFindExpress to review the job and verify whether a substitute has accepted a particular assignment.
- Contact your preferred visiting teachers and prearrange assignments.
- Call in staff development absences ahead of time to ensure coverage.

3. Substitute shortage

The following were discussed as possible solutions to substitute shortage problems.

- Continue to hire credentialed substitutes (may include those with 30-day emergency credential when there is a need).
- Advanced planning and scheduling of staff development – Staggered scheduling based on forecasting of employees non-scheduled / scheduled absences.

- Callout for absences due to professional development and extra help are stopped during extraordinarily busy days to give priority to jobs due to illness and personal emergency.

4. Visiting Teacher Training

- Generally, the district does not provide training for day-to-day visiting teachers. Certain school sites provide long-term visiting teachers certain type of training.

The County Office of Education provides inservice training for visiting teachers. For more information about visiting teachers training, call **(858) 292-3511**, or visit www.teachsocal.org

Section Three

DIRECTORY

Classified Staffing

Lisa Padelford (619) 725-8034

Certificated Staffing

Elementary Schools

Eileen Sandifer (619) 725-8015

Sonja Elston (619) 725-8012

Middle & High Schools

Darin Noyes (619) 725-8019

Special Education

Theresa Chowdhury (619) 725-8050

Substitute Assignment Management System (SAMS) SmartFindExpress

(619) 297-0304

24 hours a day / 7 days a week

Substitute Help Desk (619) 725-8090

QUICK REFERENCE PHONE NUMBERS / WEBSITES

Education Center (General Information) (619) 725-8000
Credentials (619) 725-8055 / 8056 / 8039
Employee Benefits (Medical Insurance) (619) 725-8130
Performance Evaluation Issues (619) 725-8046
Tuberculosis Exam Information (858) 627-7596
Visiting Teacher Help Desk (619) 725-8090

Payroll

Certificated Payroll – Visiting Teacher (5831 and 5998)
Pat Almazan (8 a.m. – 12 p.m.) – (619) 725-7721
Yesenia Mundo (10:30 a.m. – 2:30 p.m. – (619) 725-7723

Classified Payroll

Lori Wilkinson – (619) 725-7710

San Diego Education Association (SDEA) (619) 283-4411
California School Employees Association (858) 458-0300

Visiting Teacher Website / SmartFindExpress www.sandi.net/personnel/subs

Have a great year!!!