

SmartFind*Express*®

Employee User Guide



STATEMENT OF CONFIDENTIALITY

This information has been prepared for the express purpose of providing your organization with information about the functions and use of the eSchool Solutions SmartFind*Express* system. This material contains proprietary product information and may not be reproduced, used by, or disclosed to persons not in the employ of the recipient without the prior written consent of eSchool Solutions. **Company Confidential/Do Not Distribute – Do Not Post on Unsecured Web Sites (such as your district web site).**

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Table of Contents

Chapter 1 Introduction	3
<i>System Overview</i>	3
<i>About this Guide</i>	3
Conventions Used in this Guide	4
Chapter 2 Internet Browser Access	5
<i>Getting Started</i>	5
System Requirements	5
Signing In	5
Language Selection	5
PIN Reminder.....	6
Privacy and Terms of Use Statements (ASP Service Customers only)	6
Signing Out.....	6
Employee Home Page	7
Navigation Tools	7
<i>Using the Employee Menu</i>	8
<i>Profile</i>	8
Email	8
<i>Create an Absence</i>	9
Modifying Your Schedule	12
Confirming the Absence.....	12
<i>Reviewing Absences</i>	14
Displaying Jobs in Calendar Format.....	14
Canceling Absences.....	15
Chapter 3 Telephone Access.....	17
<i>Registration</i>	17
Main Menu	17
<i>Create an Absence</i>	17
Entering Alphabetic Characters on the Telephone	18
<i>Review, Cancel, or Modify a Job</i>	19

Chapter 1 Introduction

Welcome to SmartFindExpress!

The Employee module of the SmartFindExpress system allows quick and easy access to the information you need to create and review absences. This guide provides instructions for performing these tasks through an Internet browser or over the telephone.

System Overview

SmartFindExpress is a technology solution that integrates database records with telephone Interactive Voice Response (IVR) and browser-based technology. SmartFindExpress automates the absence entry process for you and finds a substitute to fill the absence.

Telephone IVR and computer browser software (such as Internet Explorer or Netscape), both communicate with SmartFindExpress to update information in the SmartFindExpress database.

SmartFindExpress automates, prioritizes, assigns, and dispatches the most appropriate substitutes for the job. Substitutes have the ability to decline jobs, upon which the system repeats the process for the next selected substitute in sequence. SmartFindExpress records the assignment and tracks the status through completion for record keeping and management reports.

SmartFindExpress selects substitutes to fill absences and places calls to those substitutes during the specified call-out times. Substitutes can also call into the system or use their computer to search for available jobs. SmartFindExpress can be accessed 24 hours a day, 7 days a week by administrators, employees, and substitutes.

About this Guide

This guide contains the following chapters:

Chapter 1, *Introduction*, provides an overview of the SmartFindExpress system and describes the organization of this guide and the conventions used.

Chapter 2, *Internet Browser Access*, describes the browser access features and provides instructions for creating and reviewing absences.

Chapter 3, *Telephone Access*, contains the procedures for accessing and registering with SmartFindExpress over the telephone.

In addition to this guide, all employees receive a Quick Reference card during implementation of the system or upon being hired.

Conventions Used in this Guide

To help you effectively use your documentation, this guide follows the conventions described in the following topics.

Guide Identification

The top of every page displays a header that contains the title of the guide and the current chapter name and section name.

The bottom of every page displays the publication month and year of the document.

Information Alerts

This guide uses "Notes" with the following format:

Note: *This is a sample of a note. Notes provide information that will help you with the current task.*

Typographical formats

The following text format identifies special information:

Italics	Words in <i>italics</i> indicate action buttons such as <i>Save</i> , <i>Continue</i> , <i>Return to List</i> , <i>NEXT</i> , and <i>PREV</i> .
Bold	The name of commands and options are shown in bold . References to links also appear in bold , for example, "and click the Start Date link."

Chapter 2 Internet Browser Access

This chapter includes information on browser access features and provides instructions for performing the functions on the Employee menu.

Getting Started

This section describes Internet browser access requirements and system features.

System Requirements

The minimum Internet Web Browser versions supported are:

- Microsoft Internet Explorer version 5.5 or later
- Netscape Communicator version 6.2 or later
- Mozilla/Firefox 1.0 or later
- Safari 1.0 or later

Signing In

Open your Internet browser and access the SmartFindExpress site. Your site can be found at: www._____. The SmartFindExpress Welcome screen displays the Welcome message and any "all users" announcements. Two identifiers are required to log on to the system: Access ID and Personal Identification Number (PIN). Only numeric information is allowed in these fields (no dashes). Once both fields are entered, the *Submit* button must be pressed to access the system.



Language Selection

If multiple languages are present, the language choice is offered on the Sign In page. Selecting the language choice on the Sign In page will immediately refresh the page, and all screens are displayed in that selected language after you successfully log into the system. The language choice must be made before clicking the *Submit* button.

PIN Reminder

A “Forgot your PIN?” link is located on the Sign In page to support users who want to log into SmartFindExpress, but have forgotten their PIN. When this link is selected, the system displays the PIN Reminder Request page.

Note: You must be registered with the system to use this option.

Forgot your PIN?

Please enter your Access ID and the security code shown below.
Your PIN will be sent to the email address on your profile.

*Access ID:

H V R T G E

*For security, please enter
the code shown above:

The employee's Access ID and the security code being displayed must be entered on this page. The Back button is used to exit from this page.

If the submitted information is valid, the system sends the employee an email containing their PIN. This information will enable the employee to successfully log into SmartFindExpress. The email is sent to the email address in the employee's profile.

If the submitted information is invalid, the system will return an error message and allow new information to be entered.

Privacy and Terms of Use Statements (ASP Service Customers only)

If your district uses SmartFindExpress as a service from eSchool Solutions, the system will require all existing and new users to view and acknowledge acceptance of the legal “Terms of Use” policy. This action is only required the first time a user accesses the system, or if any revisions are made to the policy. The Terms of Use may be viewed from any page in the system.

The Privacy policy explains the data collection and use practices of eSchool Solutions. It can be viewed from any page in the system. Users will be alerted if any revisions are made to this policy.

Signing Out

At any time during the session, the **Sign Out** command can be pressed to end the session and disconnect. Pressing the browser's *Back* button or going to another site on the Internet does not disconnect the session. To ensure security and privacy of information, you should sign out and disconnect or close the browser when finished with your session.

Note: Do not use the browser's Back button to navigate to a previous screen. There are buttons provided within the program to return you to previously viewed information. For example, the Return to List button, or use the tabs at the top of a screen.





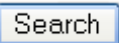

Employee Home Page

After a successful login, the home page is displayed. It displays your name and any announcements and notifications. Notifications include location announcements and notices of dates that are or have expired.



Navigation Tools

SmartFindExpress uses *links* to display user screens and various action *buttons* to perform specific functions or to navigate to other screens. Links are indicated by underlined text. All menu items are underlined. When you click on a menu item, the corresponding page is displayed. Navigation tools in SmartFindExpress consist of buttons and icons. The following table describes the common navigation tools.

Button/Icon	Function
	Displays the next screen in the process when completing a task that has multiple processes, such as the process of creating an absence.
	Clears information entered on the screen and redisplay the screen with its default information.
	Takes you to the primary listing for that feature.
	Updates the database after data entry.
	Searches the database based on the criteria entered on the screen.
	Date icon. Clicking this button displays a calendar. Select a date or use the arrows on the calendar to scroll to the next or previous months and years. Selecting a day closes the calendar and places the date in the Date field.

Note: Fields on the screen that are marked with an asterisk (*) denote required information.

Using the Employee Menu

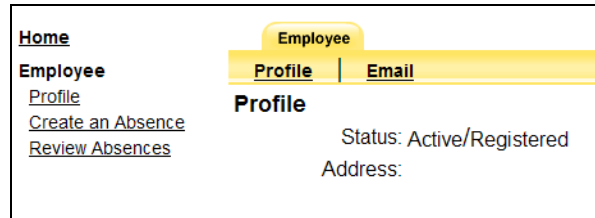
This section provides detailed instructions for using each of the options on the Employee menu.



- Profile** Use to view Profile information such as current address and status and enter or change your email address
- Create an Absence** Use to enter your absence information, select a substitute, if required, and confirm the absence.
- Review Absences** Use to search, review, or cancel absences.

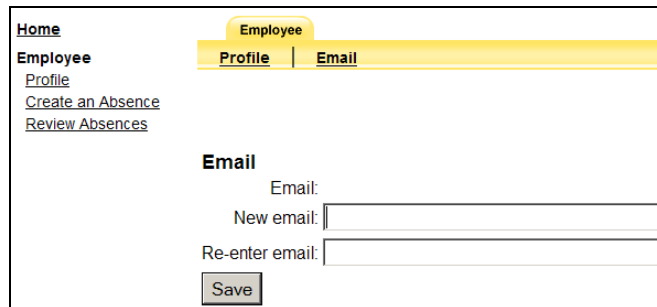
Profile

This option displays status and address information and contains an *Email* link for changing email information.



Email

When you select this option, the following page displays to allow you to enter or change your email address. Click the Save button to add this information to your profile.



Email Notices from SmartFindExpress

The system will automatically send you Job Creation and Job Cancellation emails (if your district has chosen to use this feature). For more information, contact your System Operator.

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Create an Absence

To create an absence, enter the absence information and then continue with the process until a job number is assigned.

Clicking the **Create an Absence** link displays the Create Absence screen. Complete the absence information and then click *Continue*. If all information is entered correctly, the Create Absence Confirmation screen will display next. If any errors are encountered, a message will display and the information can be corrected. A description of each field is provided in the following table.

Field Name	Description
Location	<p>Location is a pull-down menu. Your primary location is displayed.</p> <p>Note: If you have multiple locations or classifications on your profile, and the absence is being reported for a different location or classification other than the primary location or classification, use the appropriate pull-down menu to change the location and/or classification of the job. Only the locations on your profile will appear in the "Location" pull-down menu. Only the classifications on your profile for the selected location will appear in the "Classification" drop down menu.</p> <p>Note: If you are an Itinerant schedule teacher, all of the locations and classifications you work are visible on the pull-down menu. Your work schedule and times are obtained from the primary location and classification on your profile.</p>
Classification	<p>Classification is a pull-down menu. Your primary classification is displayed.</p> <p>Note: If you have multiple locations or classifications on your profile and the absence is being reported for a different location or classification other than the primary location or classification, use the appropriate pull-down menu to change the location and/or classification of the job. Only the locations on your profile will appear in the Location pull-down menu. Only the classifications on your profile for the selected location will appear in the "Classification" drop- down menu.</p>

Field Name	Description
Reason	The pull-down menu displays all absence reasons that can be selected sorted by name or code. Select a reason to assign to this absence.
Budget Code	Enter a budget code for an absence only when the reason code requires a budget code. The budget code field disappears if the reason does not require a budget code.
Is a Substitute required? Yes/No	<p>You can choose if a substitute is required for the absence. The default is Yes.</p> <p>To create the job without entering any substitute information so that the system finds a substitute for the job, click <i>Yes</i>, and then click the <i>Continue</i> button at the bottom of the screen. Otherwise, click <i>Yes</i>, and proceed with specifying/prearranging a substitute if desired. Complete the process of creating the absence.</p> <p>If a substitute is not required to fill the absence, click <i>No</i>. The system creates the job and assigns the job number. No calls will be made by the system for this job.</p> <p>Note: <i>The choice of indicating if a substitute is required is only offered if the absence would normally require a substitute.</i></p>
Dates Start/End	The default for entry of an absence is today's date. To edit the dates, click the calendar icon to display the calendar, or type in the new dates in the indicated format. You may not enter an absence for past dates.
Absence Times	The start and end time indicated for the selected location is the default.
Substitute Times	<p>The default is the same times of the absence.</p> <p>To edit the times, all four digits of the time must be entered in hh:mm am/pm format.</p>
Reporting Multiple Days?	<p>Your work schedule is displayed and can be modified. If the days are non-consecutive, or if each day of the multiple-day job has a different start/end time, click <i>Modify Schedule</i> to set the times for the absence. The Create Absence - Modify Times screen displays. Using this screen is covered in the following section.</p> <p>The workdays must correspond to the days of the absence being reported.</p>

Field Name	Description
Specify a Substitute?	<p>You can request a particular substitute for this absence. If you know the substitute's ID number, it can be entered in the substitute ID field. If the ID is unknown, click <i>Name Lookup</i> to display the Substitute Name Lookup screen. Enter the search criteria and click <i>Search</i>. The list of substitutes that match the search criteria is displayed. The following information may be provided for each substitute on the list:</p> <ul style="list-style-type: none">▪ Access ID – The substitute's access ID number.▪ Call Back # - The substitute's callback number.▪ Reg? – Indicates if the substitute is registered or not.▪ Cert? – Indicates if the substitute is certified or not.▪ Loc? – Indicates if the location of the absence is in the substitute's profile.▪ Class? - Indicates if the classification of the absence is in the substitute's profile. <p>Selecting a substitute will close the window and enter the Substitute ID and name into the fields.</p>
Has the substitute accepted this job?	<p>You can indicate that you have talked with the substitute and the substitute has agreed to accept the assignment. If <i>yes</i> is selected, the substitute will be assigned to the absence and the system will not call the substitute. This is known as "Prearranging." The substitute is then responsible for accessing the system and verifying that you did pre-arrange the absence, and obtain the job number.</p> <p>Click "No" if the substitute has not accepted this assignment. Phone calls will be made to offer the substitute the job.</p>
Substitute Instructions	<p>Instructions can be entered during job creation. The message is not limited by length and the field will scroll as information is entered. These instructions will also be voiced to a substitute over the telephone.</p>
File Attachments	<p>Files can be attached to jobs. The attachment can be any file needed by the substitute or administrator, such as lesson plans, slides, or spreadsheets. Enter the name of the file or click the Browse button to select a file.</p> <p>Files cannot exceed the maximum per file size limit. Files are uploaded in real-time and attached to the job. Files can be deleted by clicking the "trash" icon next to the file name.</p> <p>Note: <i>On Job Creation, up to three attachments can be added to the job record; on Job Modify there is no limit to the number of file attachments that can be added, however, they must be added one at a time.</i></p>
<p>Validation of the absence includes checking that the field values are correct, that information is not missing and that limitations have not been exceeded. If a substitute is specified, the substitute must pass all availability checks for the job. If any error messages display, you can re-enter the data.</p>	

Modifying Your Schedule

This screen allows you to modify your work schedule. Uncheck the box next to the day(s) you want to modify. Make your updates and then click *Continue* to return to the Absence Information screen.

Create Absence - Modify Times

Employee: ZZ Test Employee,
From: 06/06/2008 - 06/06/2008

	Absence		Substitute	
	Start Time	End Time	Start Time	End Time
Weekly Schedule	(hh:mm am)	(hh:mm am)	(hh:mm am)	(hh:mm am)
Monday: <input checked="" type="checkbox"/>	07:30 AM	03:30 PM	07:30 AM	03:30 PM
Tuesday: <input checked="" type="checkbox"/>	07:30 AM	03:30 PM	07:30 AM	03:30 PM
Wednesday: <input checked="" type="checkbox"/>	07:30 AM	03:30 PM	07:30 AM	03:30 PM
Thursday: <input checked="" type="checkbox"/>	07:30 AM	03:30 PM	07:30 AM	03:30 PM
Friday: <input checked="" type="checkbox"/>	07:30 AM	03:30 PM	07:30 AM	03:30 PM

You can uncheck days that do not apply to your absence dates. For example, if the absence days are for a four-week period and you normally work Monday thru Friday, but the absence is only for every Monday during that period, you would uncheck Tuesday thru Friday on this screen.

This screen is also used when every day of a multiple-day absence does not have the same times.

Confirming the Absence

The Create Absence Confirmation screen allows you to verify that the information is correct before the job is created. You can click the *Create Absence* button to create the job and receive a job number, or click the *Cancel* button to return to the Create Absence screen without creating the absence.

The system could automatically change your absence request due to restrictions that have been set up. You may notice a job being created as *No Substitute Required (NSR)*. If so, the reason is displayed on the screen. A job could also be created as *Automatically Assigned*. A substitute can be automatically assigned if substitutes are available for automatic assignment. Typically, the absence is created when this situation occurs.

Create Absence Confirmation

This absence will not be created until the Create Absence button is pressed

Job Status: **Open/Open**
Employee: ZZ Test Employee,
Location: ZZ TEST LOCATION
Classification: ZZ Test Classification
Reason: 999 ZZ Test Reason

Voice Instructions: None
Text Instructions: None
File Attachments: None

Dates: 06/09/2008 - 06/09/2008

Weekly Schedule: Employee Substitute
Monday 07:30 AM - 03:30 PM 07:30 AM - 03:30 PM

Specified Substitute:
Assigned Substitute:

Clicking the *Create Absence* button displays the Create Absence Verification screen. A job number has been created for this absence. The receipt of a job number is critical to successfully entering an absence in the database.

Job Creation - Successful.

Create Absence Verification

Job Number: 435

Job Status: **Open/Open**
Employee: ZZ Test Employee,
Location: ZZ TEST LOCATION
Classification: ZZ Test Classification
Reason: 999 ZZ Test Reason

Voice Instructions: None
Text Instructions: None
File Attachments: None

Dates: 06/09/2008 - 06/09/2008

Weekly Schedule: Employee Substitute
Monday 07:30 AM - 03:30 PM 07:30 AM - 03:30 PM

Specified Substitute:
Assigned Substitute:

To create a new absence, click the *New Absence* button to return to the Create Absence screen.

Reviewing Absences

This feature allows you to display all absences, or search for absences by job number or by date range. To search for absences by a date range, enter the dates in the "From/To" fields. The default date is "today." Dates can be any date in the past, present, or future, however data is limited to the number of days the data has been saved. Absences can be displayed in List or Calendar format. Once the list of absences is displayed, you can view the details of the absence or cancel the absence. Only future absences may be cancelled.

The screenshot shows a web interface for reviewing absences. On the left, there is a navigation menu with links: Home, Employee Profile, Create an Absence, and Review Absences. The main area is titled 'Review Absences' and contains the following elements: a 'Display Format' section with radio buttons for 'List' (selected) and 'Calendar'; two date input fields labeled '(mm/dd/yyyy)' for 'Search From' and 'To', each with a calendar icon; a 'Job Number' input field; a 'Search' button; and a blue note that reads 'Note: Search by job number will not use the date range'.

The list is displayed in descending date order. Cancelled jobs are optionally displayed. To navigate through the listing, use the *Next* and *Previous* buttons.

Jobs can be reviewed or cancelled by clicking the **job number** link.

The screenshot shows the 'Review Absences' page with the search filters from the previous image. Below the search area is a table of absence records. The table has four columns: Job #, Start Date/Time, Location, and Reason. A second row of headers is also present: End Date/Time, Classification, and Substitute. Two rows of data are shown, each with a link to the job number.

Job #	Start Date/Time	Location	Reason
	End Date/Time	Classification	Substitute
433	06/06/2008 07:30 AM	ZZ TEST LOCATION	ZZ Test Reason
	06/06/2008 03:30 PM	ZZ Test Classification	Open
435	06/09/2008 07:30 AM	ZZ TEST LOCATION	ZZ Test Reason
	06/09/2008 03:30 PM	ZZ Test Classification	Open

Displaying Jobs in Calendar Format

The calendar format displays jobs starting with the "Search From" month. One month is displayed at a time. The job number and start time display. Pressing the **job number** link displays the job details. If there are multiple absences for the same day, they will be listed. Cancelled jobs do not display in the calendar format. Non-workdays (based on daily availability) and weekends are shaded in light gray.

< Prev Month		June 2008					Next Month >
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6 433 07:30 AM	7	
8	9 435 07:30 AM	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30						

Canceling Absences

Click the **job number** link to review or cancel a job. The Review Absence Detail screen is displayed. This screen lets you review the details of an absence, update absence information, or cancel an absence.

File attachments can be added or deleted during job review. Files must be added one at a time. Once a file is added, click Save to add the new file to the job.

If the job is in "Open" status, the text instructions can also be updated. Click Save after making any changes.

Review Absence Detail

Job Number: 435
 Job Status: Open/Open
 Location: ZZ TEST LOCATION
 Classification: ZZ Test Classification
 Reason: ZZ Test Reason

Voice Instructions: None
 Text Instructions:

File Attachments: None

Add a File: (Maximum file size=2048K)

Start Date: 06/09/2008
 End Date: 06/09/2008

Weekly Schedule: **Employee** **Substitute**
 Monday 07:30 AM - 03:30 PM 07:30 AM - 03:30 PM

Specified Substitute: None
 Assigned Substitute: Open

Notify the substitute of a cancellation?

A *Cancel Job* button will display next to the Save button only for current and future jobs with the following conditions:

- The job is not yet started and the time before the job starts, that jobs can be cancelled, has not been reached. (**Note:** Based on system parameters, the open portion of a multiple-day job can be cancelled when some of the job days have already finished.)
- A substitute is not assigned or a substitute is assigned and job cancellation is allowed.

To cancel the absence, first indicate that the substitute needs to be notified of the cancellation by clicking in the box, and then click *Cancel Job*. The system will notify the substitute of the cancelled job by placing a telephone call. Cancelled jobs may display on the job list based on the system setup parameters. The job list redisplay with the word "*Cancelled*" displayed under the job number.

Chapter 3 Telephone Access

This chapter provides information and procedures for accessing SmartFindExpress using a telephone (Interactive Voice Response).

Registration

Before any features are available, you must register with the system and create a PIN. The Access ID and PIN are used for all interactions with the system and should never be used by anyone else.

To register, follow this procedure:

1. Call the main system number.
2. Enter your Access ID, followed by the star (*) key.
3. Enter your PIN, followed by the star (*) key. If your Access ID and PIN are same number, you will be asked to enter a new PIN before you can continue using the system. PIN numbers must meet the minimum length that has been setup in the parameters and can only contain numeric information.
4. If there has been no voice recording of your name, you are asked to record your name. Record your name and when you have finished recording, press the star (*) key.
5. Finally, you will hear the locations and classifications that have been setup in your profile. If this information is not correct, please contact your system operator. You are only allowed to create absences for the locations and classifications listed.

Main Menu

The following options are available from the main menu:

- Create an absence
- Review, cancel, or modify jobs
- Review work location and job descriptions
- Change your PIN or the recording of your name.

Create an Absence

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

To enter an absence, follow these steps:

1. Call the main system number.
2. Enter your Access ID and PIN, both followed by the star (*) key.
3. Select "1" to create an absence.
4. If you have multiple locations and classifications in your profile, you will be asked to select one from a list. If you have more than nine in your profile, or you are classified as an itinerant teacher, you will be asked to enter the location and classification.

5. Select the start and end dates of the absence. The system asks you to indicate whether the absence is only for today, tomorrow, or if you want to enter the dates. The dates are entered as four digits in the format of MMDD. Parameter settings control the number of days in the future that an absence can be entered.
6. Select the start and end times of the absence. The default times for the absence location will play. Accept the default or enter specific times. The times are entered as four digits in the format of HHMM. Either the 12-hour clock or military times can be entered. The 12-hour clock will ask you to indicate am or pm. If this is a multiple day absence, each day's times must be confirmed. The absence times are also used for the substitute's times.
7. Select a reason for the absence and press the star (*) key. A list of reasons automatically plays, but the reason can be entered at any time.
8. Record special instructions. Special instructions are used to provide information to the substitute. The substitute will know the dates, times, location, classification of the absence and your name. Special instructions allow you to tell a substitute where a lesson plan can be found, that a field trip is planned for that day, that the absence is actually split between two locations, or any other information that would assist the substitute in covering the absence. This needs to be a positive, instructional message. Because special instructions are played to each substitute offered the job, it is inappropriate to use special instructions to request a substitute or verbally state that a particular substitute is not desired. Parameter settings control the maximum length of the special instructions recording. You can choose to not record special instructions or to record any length of information up to the maximum length allowed.
9. Choose if a substitute is required for the absence. In some instances, a substitute is not required if it is a teacher workday or during a planning period.
10. If a substitute is needed, you may specify or prearrange a substitute. Parameters control if you can request a substitute for the job, enter the job as prearranged, or report an absence that does not require a substitute. Requesting a substitute means that only the specified substitute will be called for that job until the following occurs:
 - A set time designated to release the job to other substitutes
 - The specified substitute declines the job
 - The specified substitute becomes unavailable for the date(s) and times of the job. The requested substitute can be prearranged. An absence is considered prearranged if you have talked with a substitute who verbally confirmed that they would cover your absence. Prearranged substitutes will not be called by the system. They will have to access the system to obtain the job number.
11. Obtain the job number. Please stay on the line and hear the job number played to you. Remember, no job number means that the absence has **not** been created.

Entering Alphabetic Characters on the Telephone

Reason codes, location codes, and classification codes may contain alphabetic characters. When entering alphabetic characters, press the digit that corresponds to the letter. For example: for A, B or C, press 1. If the system determines there are multiple codes that apply to the key presses, you will hear a list of codes. Choose the correct code from the list.

Review, Cancel, or Modify a Job

After reporting an absence, you can call in and review or cancel an absence or modify the special instructions of a future absence that has already been reported. To do this:

1. Call the main system number.
2. Enter your Access ID and PIN, both followed by the star (*) key.
3. Press "2" to review, cancel, or modify an absence.
4. The open and active jobs are played in date order. To view past jobs, please use Web access. After each job is played, a menu allows you to repeat the job information, hear the next job, modify special instructions, or cancel the job. If you need to modify the job's dates, times or reason information, you must cancel the job and then create a new absence.

Special instructions may be deleted or re-recorded.

When canceling a job that has an assigned substitute and if allowed, you will be asked to indicate if the system should call the assigned substitute. To confirm cancellation, please wait until the system says, "Job number **xxxxxx** has been cancelled." If you do not stay on the telephone to hear the cancellation confirmation, there is no guarantee that the absence has been cancelled.