

**Employee Quick Reference Card**

**Web Browser URL**                    <https://subserviceocmboces.eschoolsolutions.com>  
**System Operator E-mail**                    [subservice@ocmboces.org](mailto:subservice@ocmboces.org)  
**System Operator Phone Number**        315-433-2606 (6:30 am – 10:00 am)  
**Automated Phone Number**                315-433-2640

**Write your Access ID here**                    \_\_\_\_\_  
**Write your PIN here**                                \_\_\_\_\_

**REGISTRATION INSTRUCTIONS**

Before any features are available, you must register with the system and create a PIN. The ACCESS ID and PIN are used to identify yourself.

**REGISTRATION – Can only be done by TELEPHONE. Call 315-433-2640.**

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 create a PIN. Enter a PIN. Your PIN cannot start with a zero “0”, must be at least four (4) digits and not exceed nine (9) digits, in length followed by the star (\*) key.

**TELEPHONE: ACCESS INSTRUCTIONS**

**THE SYSTEM CALLS SUBSTITUTES DURING THE FOLLOWING TIMES:**

	<b>Today’s Jobs</b>	<b>Future Jobs</b>
Monday - Friday	Starts at 5:30 am	6:00 pm - 10:00 pm
Saturday / Sunday / Holiday	None	6:00 pm - 10:00 pm

Call: 315-433-2640 to access the OCM BOCES Automated Substitute Call-In Service.

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

**MENU OPTIONS**

- 1 – Create an Absence**
- 2 – Review Absence, Cancel Absence or Modify Special Instructions**
- 3 – Review Work Locations and Job Descriptions**
- 4 – Change PIN, Re-record Name**
- 9 – Exit and hang-up**

**TO CREATE AN ABSENCE**

1. Enter dates for the absence – *You must also complete any district required paperwork*  
**PRESS 1** if the Absence is only for today  
**PRESS 2** if the Absence is only for tomorrow  
**PRESS 3** to Enter the dates and times for the absence
2. If you **pressed 3** to Enter Dates and time  
Enter Start Date  
**PRESS 1** to Accept the date offered  
**PRESS 2** to Enter start date (MMDD)
3. Enter the absence reason followed by the star (\*) key or wait for a list of reasons
4. Record Special Instructions  
**PRESS 1** to Record special instructions. Press the star (\*) key when done  
**PRESS 2** to Bypass this step
5. Is a Substitute Required?  
**PRESS 1** if a substitute *is* required  
**PRESS 2** if a substitute *is not* required
6. If you **pressed 1**, a substitute is required  
**PRESS 1** to Request a particular substitute  
Enter the substitute Access ID, followed by the star (\*) key  
**PRESS 1** to Accept requested substitute  
**PRESS 1** if the Substitute should be called (specified)  
**PRESS 2** if the Substitute has already agreed to work and will **not** be called (pre-arranged)  
**PRESS 2** to Bypass requesting a substitute
7. Complete Absence  
**PRESS 1** to Receive the job number. ***The Job Number is your confirmation.***

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**TO REVIEW/CANCEL ABSENCE OR MODIFY SPECIAL INSTRUCTIONS**

1. Hear the job information  
**PRESS 1** to Hear absence information again  
**PRESS 2** to Modify special instructions  
**PRESS 3** to Cancel the absence
2. If you **pressed 3** to Cancel the job  
**PRESS 1** to Confirm the cancellation request  
If a substitute is assigned to the absence  
**PRESS 1** for the System **to call** the assigned substitute [Recommended]  
**PRESS 2** to **Not** have the system call the substitute  
Once you confirm a request to cancel the job, you **MUST** wait for the system to say ***"Job Number has been cancelled."***

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**TO CHANGE PIN or RE-RECORD NAME**

1. **PRESS 1** to Change your PIN  
**PRESS 2** to Change the recording of your name – Note You must re-record your name if you have a name change.

## **SIGN IN**

Open your browser and access the Sign In page (<https://subserviceocmboces.eschoolsolutions.com>). Enter your ACCESS ID and PIN.

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## **PIN REMINDER**

The “Trouble Signing In” link supports users who want to log into the system, but have forgotten their PIN. When this link is selected, the system displays the PIN Reminder Request page. The user’s ACCESS ID and the security code being displayed must be entered on this page. **Note: You must be registered with the system and have a valid email address in your profile to use this option.**

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## **PROFILE**

**Email** - Enter or change email address.

**Change PIN (Password)**-Enter your current PIN followed by a new PIN twice & Save.

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**TO CREATE AN ABSENCE** – *You must also complete any district required paperwork*  
Choose the *Create an Absence* link

**Important Note: Items in Bold are required to complete an Absence.**

- **Select the Location**
- **Select the Classification**
  - Choose from the drop-down menu
- **Select the Reason for this absence from the drop-down menu**
- **Indicate if a substitute is required for this absence**
  - Choose Yes or No
- **Select Start and End Dates for your absence**
  - Enter the dates with forward slashes (MM/DD/YYYY) or use the calendar icon
- **Select Start and End Times for your absence. Default times are listed**
  - To change defaults, enter time in HH:MM am or pm format
  - Ensure that the correct time is entered. If the times for the substitute are different than the absence times, please enter the adjusted times
- Multiple Day (Recurring) Absence.
  - Your default work schedule is shown. Remove the checkmark(s) from the Work Days boxes that do not apply to this absence
  - Modify daily schedule and/or times for absence and substitute
- Request a particular substitute
  - Enter the substitute’s ACCESS ID number or use the Search feature to find the substitute by name
- Indicate if the requested substitute has accepted this job
  - Yes = substitute **will not** be called and offered the job [Pre-arranged] (Provide **Job Number** to substitute.)
  - No = substitute **will be** called and the substitute will be offered the job [Specified]

- Enter special instructions for the substitute to view
- Add File Attachment(s) to the job record, if desired. Up to 3 files can be added. The attachments can be lesson plans, slides, images or other file types. Files cannot exceed the maximum per file size limit.
- **Select the Continue button, review job, select the Create button**

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

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## TO REVIEW/ CANCEL ABSENCE OR MODIFY SPECIAL INSTRUCTIONS

Choose the *Review Absences* link to review past, present and future absences or to cancel an absence.

Follow these steps

- Select the format for absence display: List or Calendar view.
- Search for Jobs: Enter specific date range (MM/DD/YYYY) or Calendar icon, or enter job number or leave blank to return all your absences
- Select the *Search* Button
- Select the *Job Number* link to view job details on future jobs

From the Job Details screen

- Special instructions can be updated on future jobs. Modify the special instructions and select the *Save* button
- To cancel your job, select the *Cancel Job* button
- If a substitute is assigned to your absence and you want the system to notify them of the job cancellation (by calling them), place a checkmark in the box prior to the question "Notify the Substitute of Cancellation?"
- Select *Return to List* button to return to the job listing

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## 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. Selecting 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, use the *Sign Out* link to disconnect from SmartFindExpress, and close the web browser when you finish with your session.

**NEED HELP?** You can click the **Help** link to access Help Guides and How-to videos in SFE. There is also information and documents on OCMBOCES.org

### Important Note:

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

*Make sure you received a job number when creating an absence.*

*Make sure your email is in the system. The system will send confirming, cancellation and reminder emails.*

*Review your calendar regularly to ensure accuracy.*