ReadySub for Administrators

Administrator User Guide

RS

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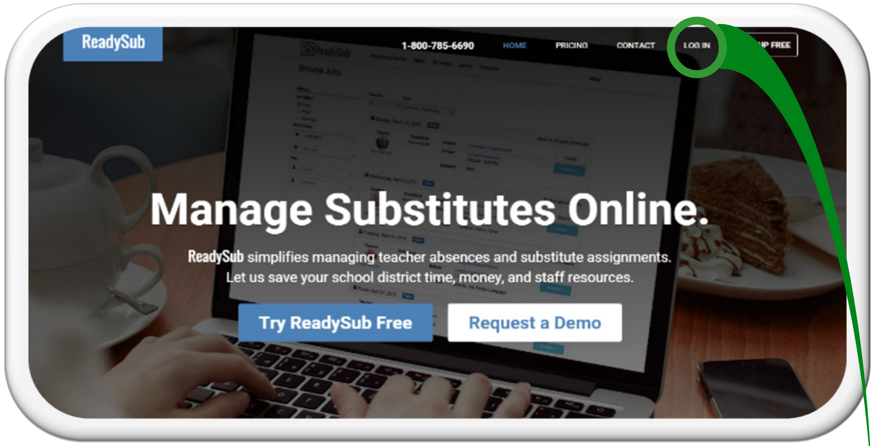
What is ReadySub?

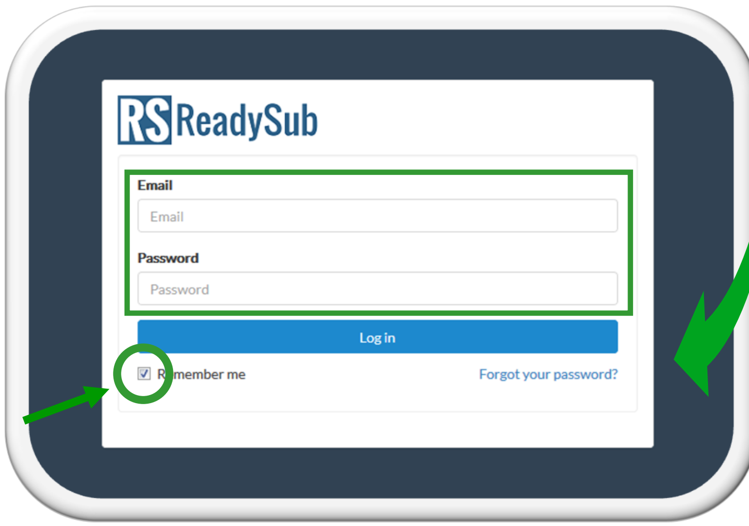
ReadySub is a state of the art employee absence management and substitute placement system. Administrators can create employees and substitutes, assign, release, transfer, and cancel jobs, and view reports. Employees can post jobs, assign and request substitutes, and track their absences. Substitutes can review and accept jobs, be requested for jobs they are qualified for, and track their work history. ReadySub is built on cutting-edge technologies offering security, adaptability, and optimal performance.



Log In

To log in to ReadySub, enter www.readysub.com into your internet browser, navigate to the top right corner of the screen, and select Log in. You will be redirected to the ReadySub login page where you can enter your email address and password.

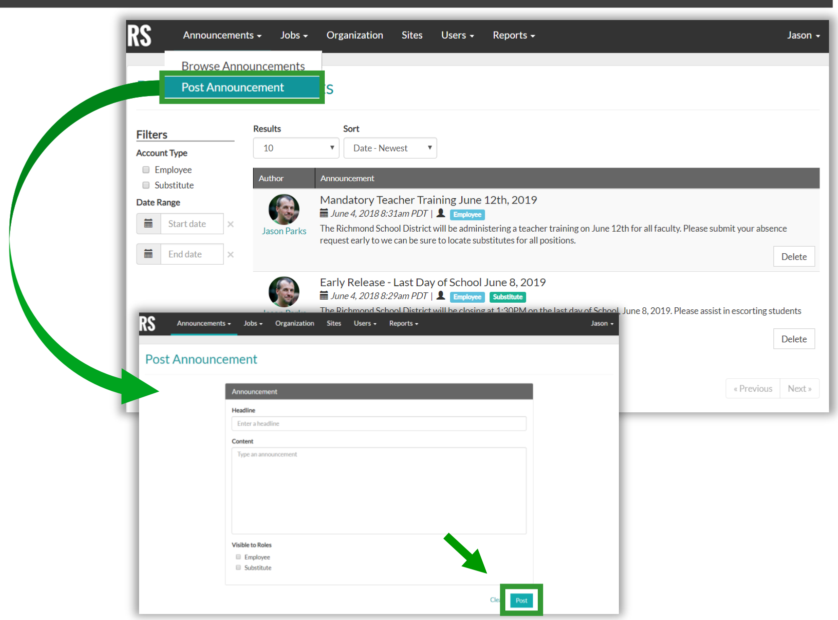
When your account is initially activated, you will receive a Welcome email with a temporary password. Upon first login, you can update your password for future logins. If you would like ReadySub to remember your username and password and to keep you logged in, make sure to check the Remember Me box towards the bottom left corner of the screen.



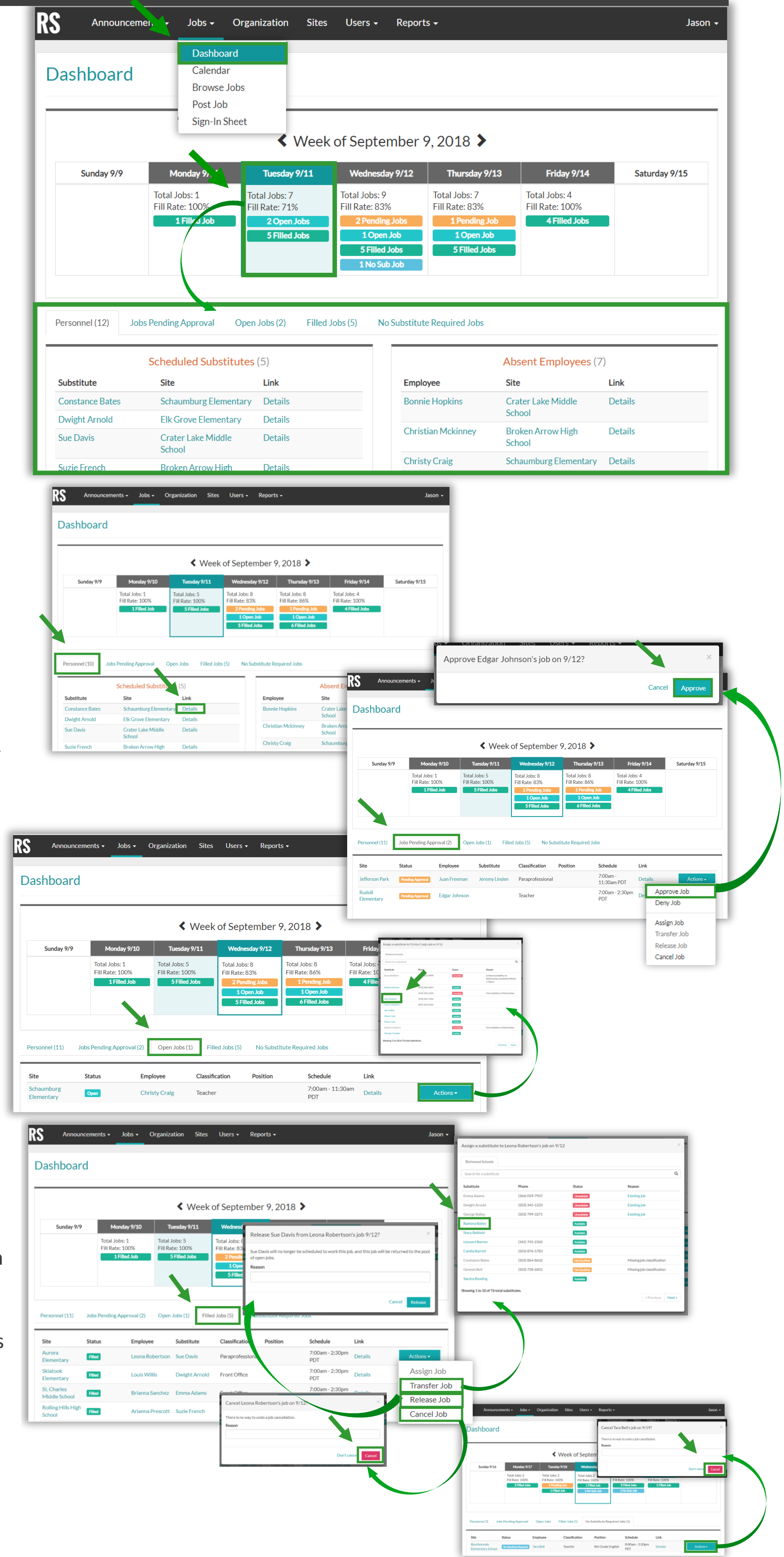
Announcements

As an administrator you can post announcements to your employees and substitutes and they will receive an immediate email notification and be able to view it from their Announcement tabs. To view an announcement that you have previously posted, select Browse Announcements. You will see the date and time of your post . You also have the ability to delete announcements and filter them by account type and date.

To post an announcement, hover over the Announcements tab and select Post Announcement. Fill out the Headline and Body of the post and select the account type(s) that will receive the announcement. Once the information has been added, click Post to post the announcement.



Dashboard



The ReadySub Administrator Dashboard is a great tool for managing your employee absences and scheduled substitutes. At the top of the page is a weekly account of all open and filled jobs, those pending administrator approval as well as No Substitute Required absences.

Towards the bottom of the page is additional job related information for the selected day above. This section has five tabs: Personnel, Jobs Pending Approval, Open Jobs, Filled Jobs and No Substitute Required Jobs.

The Personnel tabs highlights all absent employees and scheduled substitutes for the day in question. You can also view the details of any job for that day by clicking the corresponding Details link.

The Jobs Pending Approval tab shows absence requests pending administrator approval. You can approve or deny absences by clicking the Actions button followed by Approve or Deny.

The Open Jobs tab shows all open jobs for the selected day. You can assign a substitute directly to a job by clicking Assign which will produce a pop-up with all of the substitutes in your organization. A column of phone numbers allows you to call these substitutes directly. You can fill the job by selecting their name followed by Assign to confirm the assignment.

The Filled Jobs tab is a list of all filled jobs for the selected day. You can see the absent employee, scheduled substitute and location of each job. There is an Actions button which allows you to release the scheduled substitute from the job and send it back out to the pool. You can also cancel or transfer the job from one of your substitutes to another. In all cases ReadySub will send immediate notifications to the relevant parties of the change in accordance with their notification preferences.

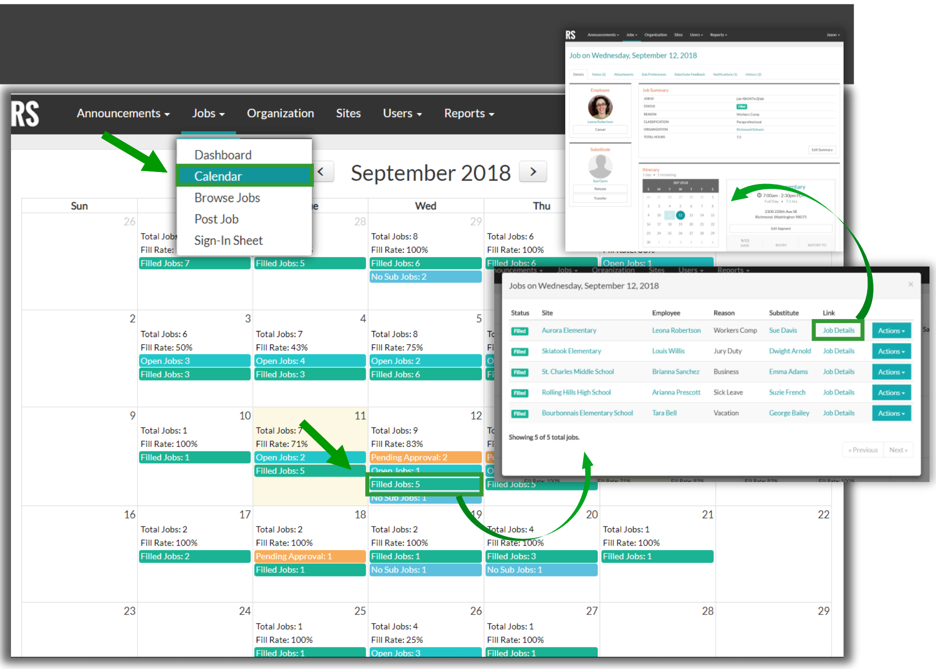
The No Substitute Required Jobs tab lists all absences that do not require a substitute. You can cancel No Substitute absences by clicking Actions followed by the Cancel button. Should you want to change a No Substitute Required absence to a sub-eligible job or visa-versa, you can do so from the Details page of any job.

Calendar

The ReadySub Administrative Calendar provides a monthly view of all open and filled jobs, those pending approval, and any no substitute absences.

To view jobs for a specific date, click the corresponding Status (Open, Filled, Pending Approval, No Substitute Required) to access a list of those jobs. From there you can click the Details of a specific job for additional information.

In addition to the time, date, organization, and site, you can see notes, attachments, substitute preferences and the job's history. You can also assign, release, transfer, confirm, split, edit and cancel the job from this page.



Browse Jobs & Absences

The Browse Jobs page is a chronological list of all open and filled jobs, those pending approval, and no substitute absences. You can search for specific jobs using the filters to the left of the page.

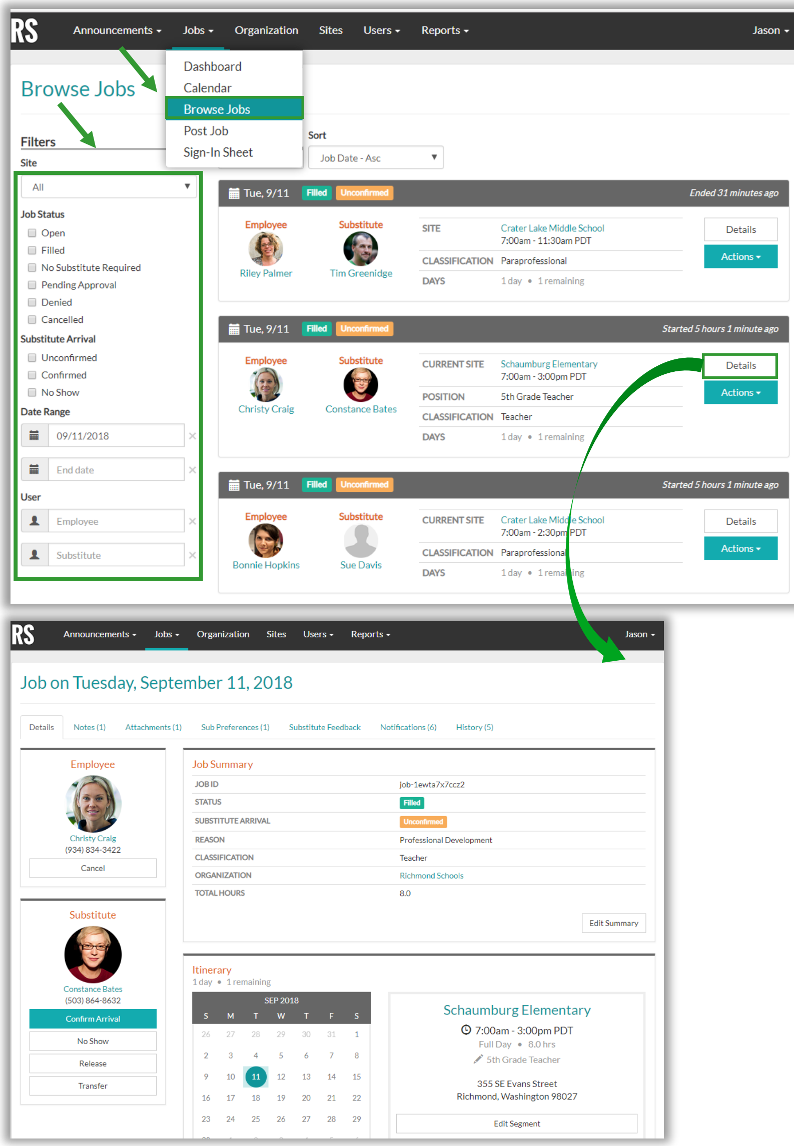
To change the status of a job, click the corresponding Actions button towards the right of the screen and a drop down menu will appear.

If the job is open, you can assign a substitute which will automatically fill the opening. If the job is already filled you can transfer the job to another substitute or release the job and ReadySub will send the job out to all available and qualified substitutes.

The transfer function prompts you to choose an alternate substitute which will remove the original substitute from the job and assign the new substitute to it. You can also cancel and split absences from this page.

To view the details of any job, click the corresponding Details button. In addition to the time, date, organization, and site, you can see notes, attachments, substitute preferences, and job history. You can also assign, release, transfer, and cancel jobs from this page.

In all cases, substitutes and employees can be notified via email and text of any changes to their jobs based on their notification settings.



Post a Single-Day Absence

To post a single-day absence, hover over the Jobs drop down and select Post Job then follow these steps:

For more complex job postings including separate substitute hours, multiple reasons and multiple sites, see the corresponding section of this guide.

Step 1 - Summary: Select the absent employee and classification.

Step 2 - Itinerary: Select single-day and enter the schedule, start and end times, reason, position, room, and report to person.

Step 3 - Substitute: Options include Posting to the pool of available/qualified substitutes, requesting up to 5 substitutes, or assigning a substitute directly to the job. You can also enter the No Substitute option for non-sub-eligible absences.

To post to the pool, select Post to Pool followed by the Next button.

To request one or more substitutes, click the Add button next to Requested Substitutes and choose your substitute(s). All requested substitutes and employee favorites will have 72 hours from the time the job is submitted or until 5:00PM local time the night before (whichever is sooner). If the job is still open after the requested period has expired, ReadySub will automatically post the job to all qualified and available substitutes. The 72 hour and 5:00PM settings can be adjusted for your organization as well.

To assign a substitute directly to a job, click the Assign Substitute (handshake) option followed by the Substitute field and choose any substitute that meets the classification and scheduling requirements of the job. To Post a no substitute absence click No Substitute Required and the Next button.

Step 4 - Notes and Attachments: Add notes to substitutes and/or administrators and attach up to 5 files.

Step 5 - Post: Review then click Post Job and you will be taken directly to the details page of the now posted job.

Post a Multi-Day Absence

To post a multi-day absence, hover over the Jobs drop down and select Post Job then follow these steps:

Step 1 - Summary: Select the absent employee and classification.

Step 2 - Itinerary: Select the Multi-Day option and enter each date of the job in the multi-day calendar. If there are unique schedules for different days of the job, click the “+” button to add multiple itineraries. Once the dates and itineraries are set, enter the schedule, reason, start and end times, position, room, and report to person.

Step 3 - Substitute: Options include Posting to the pool of available/qualified substitutes, requesting up to 5 substitutes, or assigning a substitute directly to the job. You can also enter the No Substitute option for non-sub-eligible absences.

To post to the pool select Post to Pool followed by the Next button.

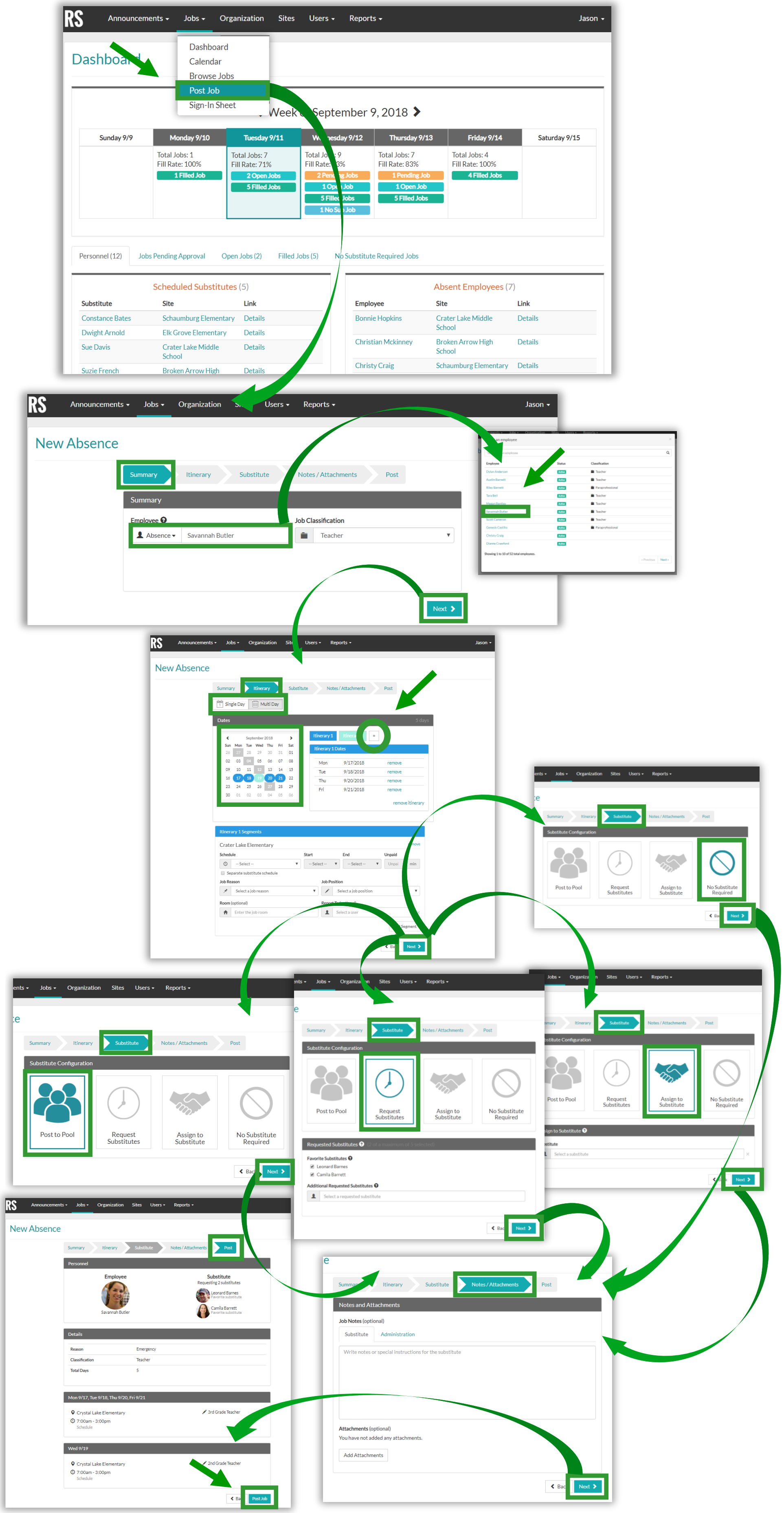
To request one or more substitutes, click the Add button next to Requested Substitutes and choose your substitute(s). All requested substitutes and employee favorites will have 72 hours from the time the job is submitted or until 5:00PM local time the night before (whichever is sooner). If the job is still open after the requested period has expired, ReadySub will automatically post the job to all qualified and available substitutes. The 72 hour and 5:00PM settings can be adjusted for your organization as well.

To assign a substitute directly to a job, click the Assign Substitute (handshake) option followed by the Substitute field and choose any substitute that meets the classification and scheduling requirements of the job.

To Post a no substitute absence click No Substitute Required and the Next button.

Step 4 - Notes and Attachments: Add notes to substitutes and administrators and attach up to 5 files.

Step 5 - Post: Review then click Post Job and you will be taken directly to the details page of the now posted job.



Post An Absence with Multiple Leave Reasons

To post an absence with multiple leave reasons, hover over the Jobs drop down and select Post Job then follow these steps:

Step 1 - Summary: Select the absent employee and classification.

Step 2 - Itinerary: Set the date(s) and click the "Add Segment" button towards the bottom right corner of the screen.

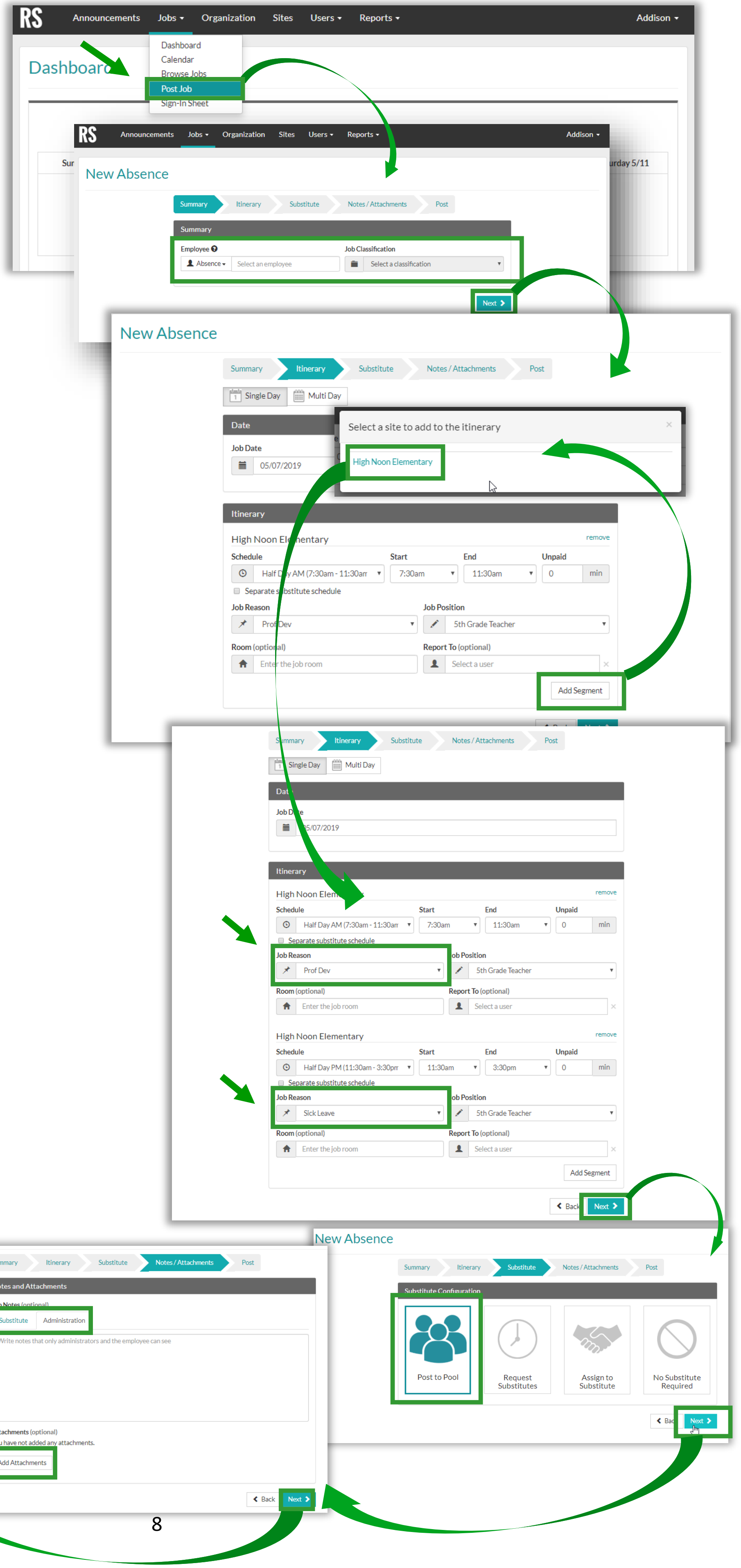
Set your schedule and hours for each leave reason and make sure the start and end times of each schedule do not overlap as ReadySub will produce an error message in this case.

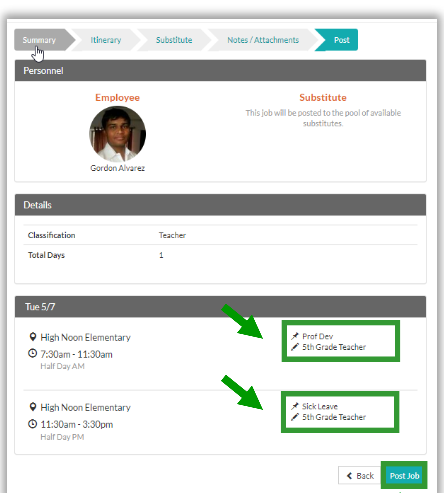
Should your absence require a 3rd or 4th leave reason, just click the "Add Segment" button again and follow the same steps then click Next.

Step 3 - Substitute: Select one of the 4 main substitute options: Post to Pool, Request Substitutes, Assign to Substitute, or No Substitute Required. See the Post a Single Day Absence section of this user guide for more information.

Step 4 - Notes and Attachments: Add notes to substitutes and/or administrators and attach up to 5 files.

Step 5 - Post: Review then click Post Job and you will be taken directly to the details page of the now posted job.





Post an Absence with Multiple Sites

To post an absence with multiple sites, hover over the Jobs drop down and select Post Job then follow these steps:

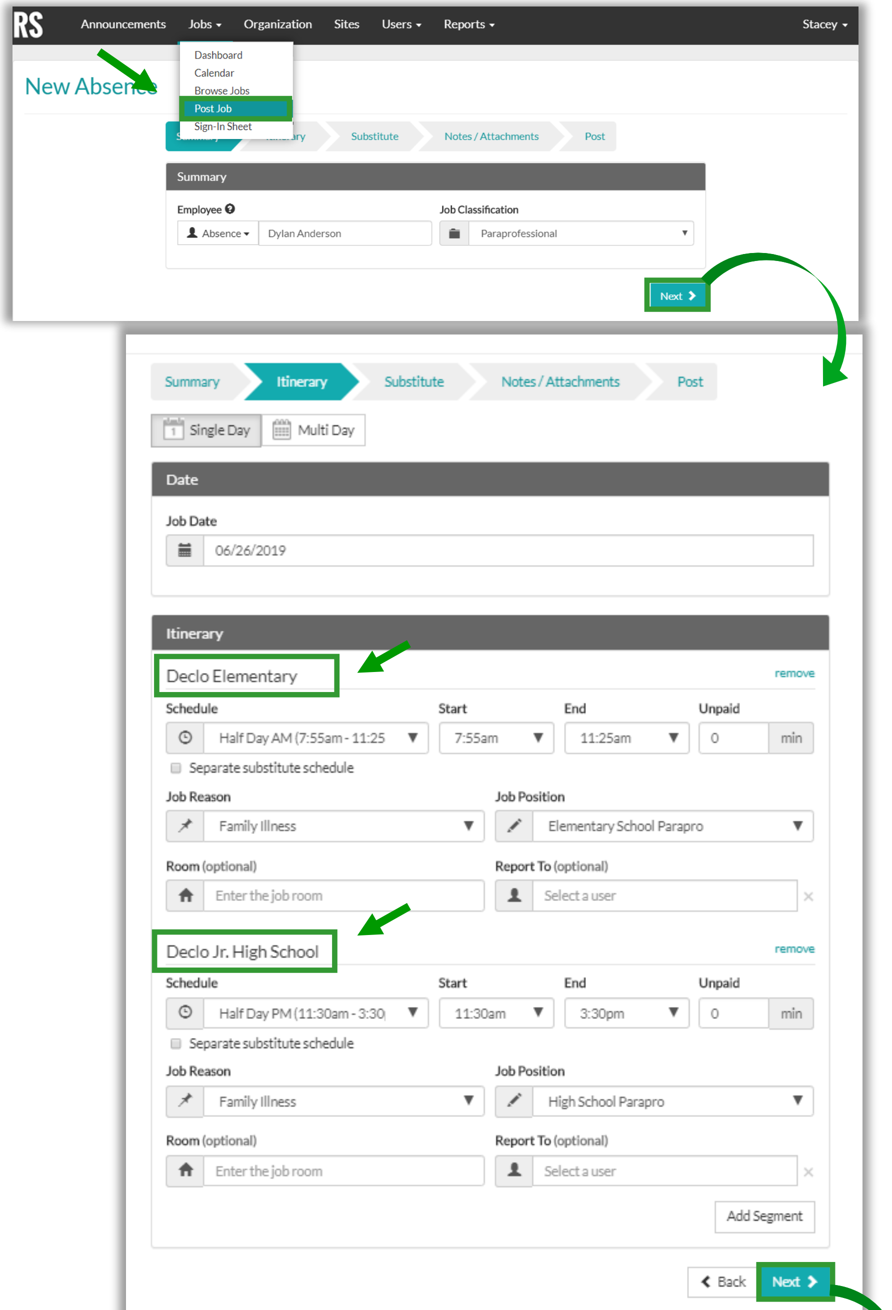
Step 1 - Summary: Select the absent employee and classification. **The employee you are selecting must have the sites already associated with their account which you can update from their profile page.**

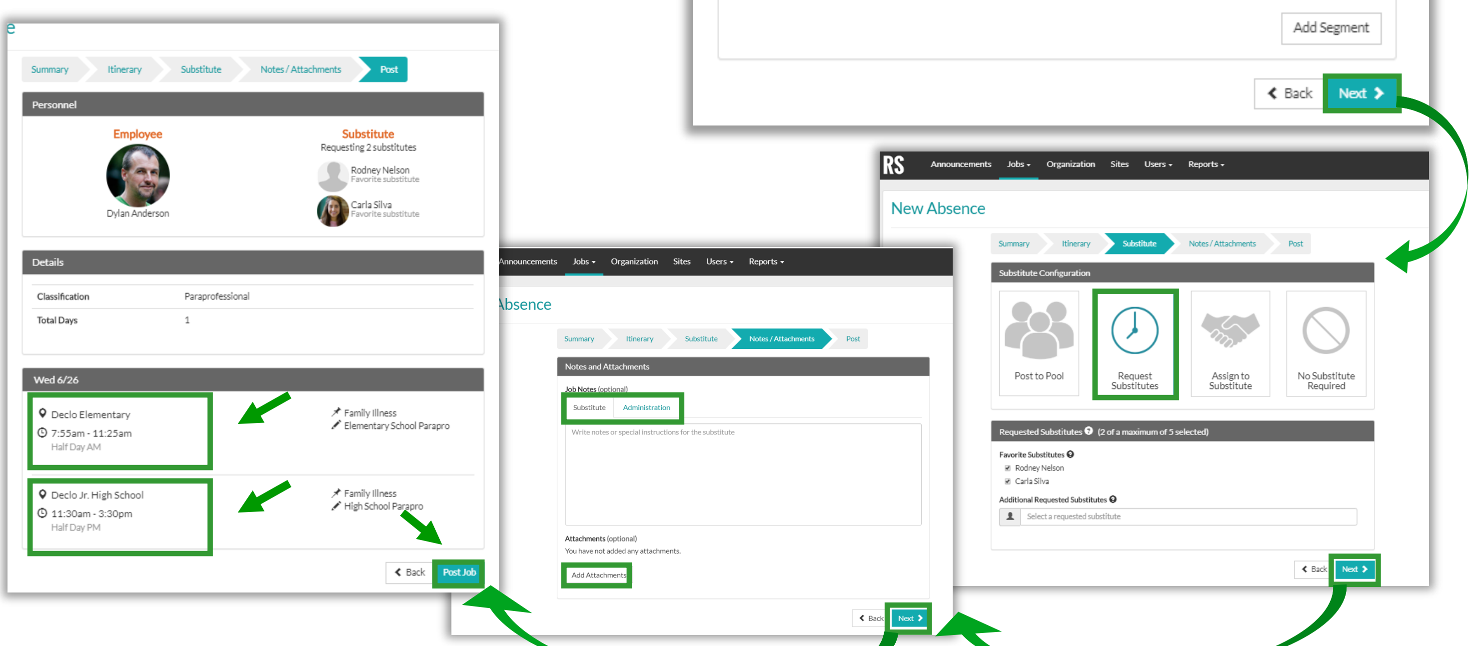
Step 2 - Itinerary: Select the date followed by the schedule and hours for each site. Make sure the start and end times of each schedule do not overlap as ReadySub will produce an error message in this case. Enter the leave reason, position, room, and report to person and click next.

Step 3 - Substitute: Select one of the 4 main substitute options: Post to Pool, Request Substitutes, Assign to Substitute, or No Substitute Required. See the Post a Single Day Absence section of this user guide for more information.

Step 4 - Notes and Attachments: Add notes to substitutes and/or administrators and attach up to 5 files.

Step 5 - Post: Review and confirm the submission. Click Post Job and you will be taken directly to the details page of the submitted job.





Post an Absence with Separate Absence & Substitute Times

To post an absence with separate absence and substitute times, hover over the Jobs drop down and select Post Job then follow these steps:

Step 1 - Summary: Select the absent employee and classification.

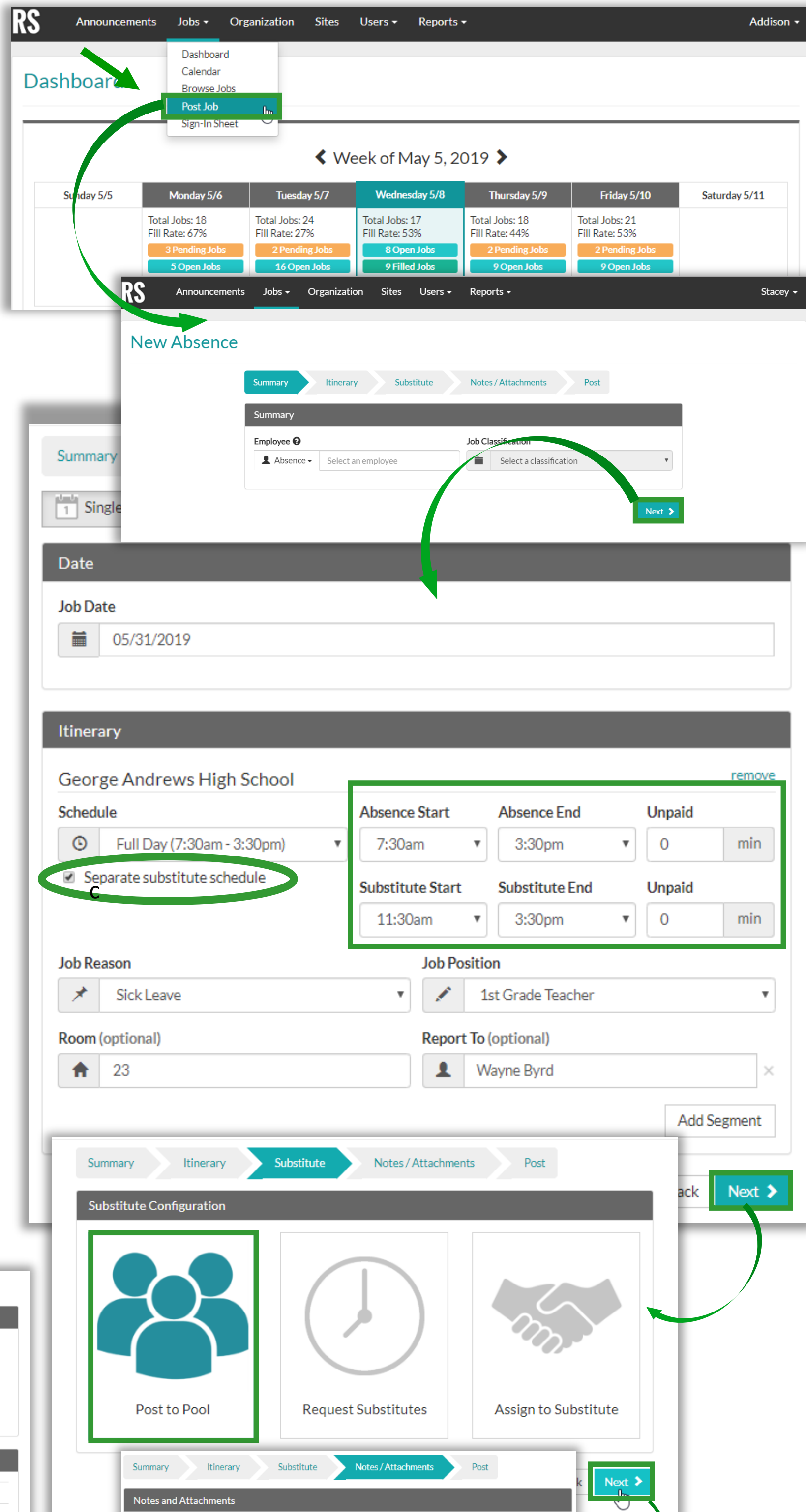
Step 2 - Itinerary: **Select the date and the schedule followed by the box that says "Separate substitute schedule" and a new schedule option will appear with a start and end time for the substitute.**

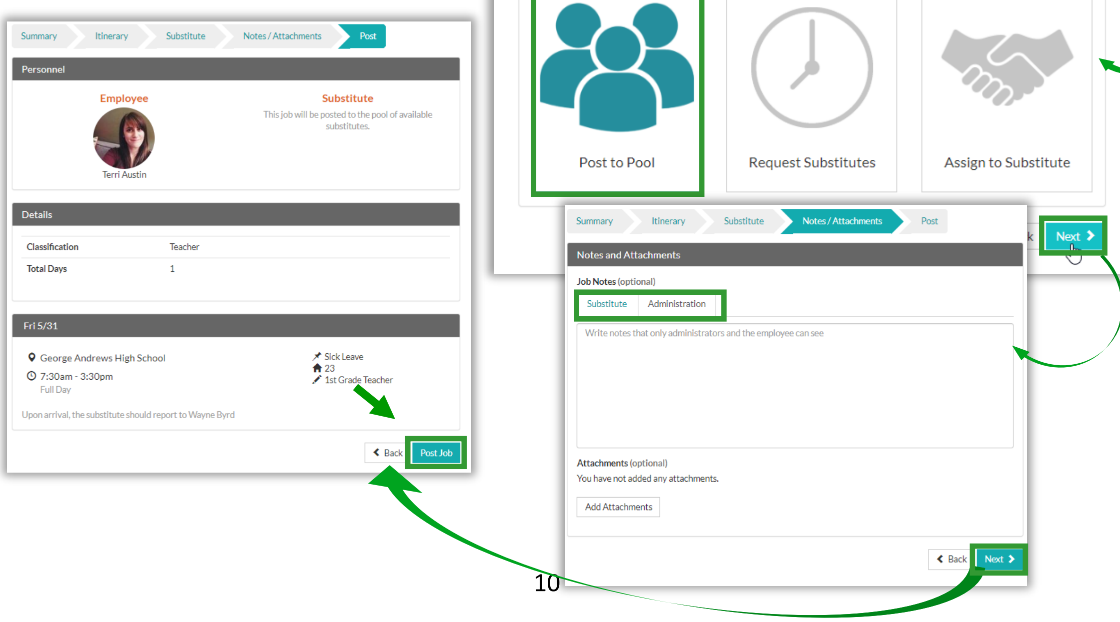
Select the hours of the absence as well as the hours the substitute will need to cover. Enter the leave reason, position, room, and report to person and click next.

Step 3 - Substitute: Select one of the 4 main substitute options: Post to Pool, Request Substitutes, Assign to Substitute, or No Substitute Required. See the Post a Single Day Absence section of this user guide for more information.

Step 4 - Notes and Attachments: Add notes to substitutes and/or administrators and attach up to 5 files.

Step 5 - Post: Review then click Post Job and you will be taken directly to the details page of the now posted job.





Post a Vacancy

ReadySub's Vacancy functionality allows administrators to post jobs <u>without</u> the need to specify an absent employee as in the case of floater or proctor substitute requests.

To post a Vacancy, go to the Jobs drop down and select Post Job then follow these steps:

Step 1 - Summary: **Click the arrow next to Absence and select Vacancy** then choose the classification of the job.

Step 2 - Itinerary: Click Add Segment and selecting the job's site(s). You can then enter the schedule, start time, end time, position, room, and report to person.

Step 3 - Substitute: Options include Posting to the pool of available/qualified substitutes, requesting up to 5 substitutes, or assigning a substitute directly to the job.

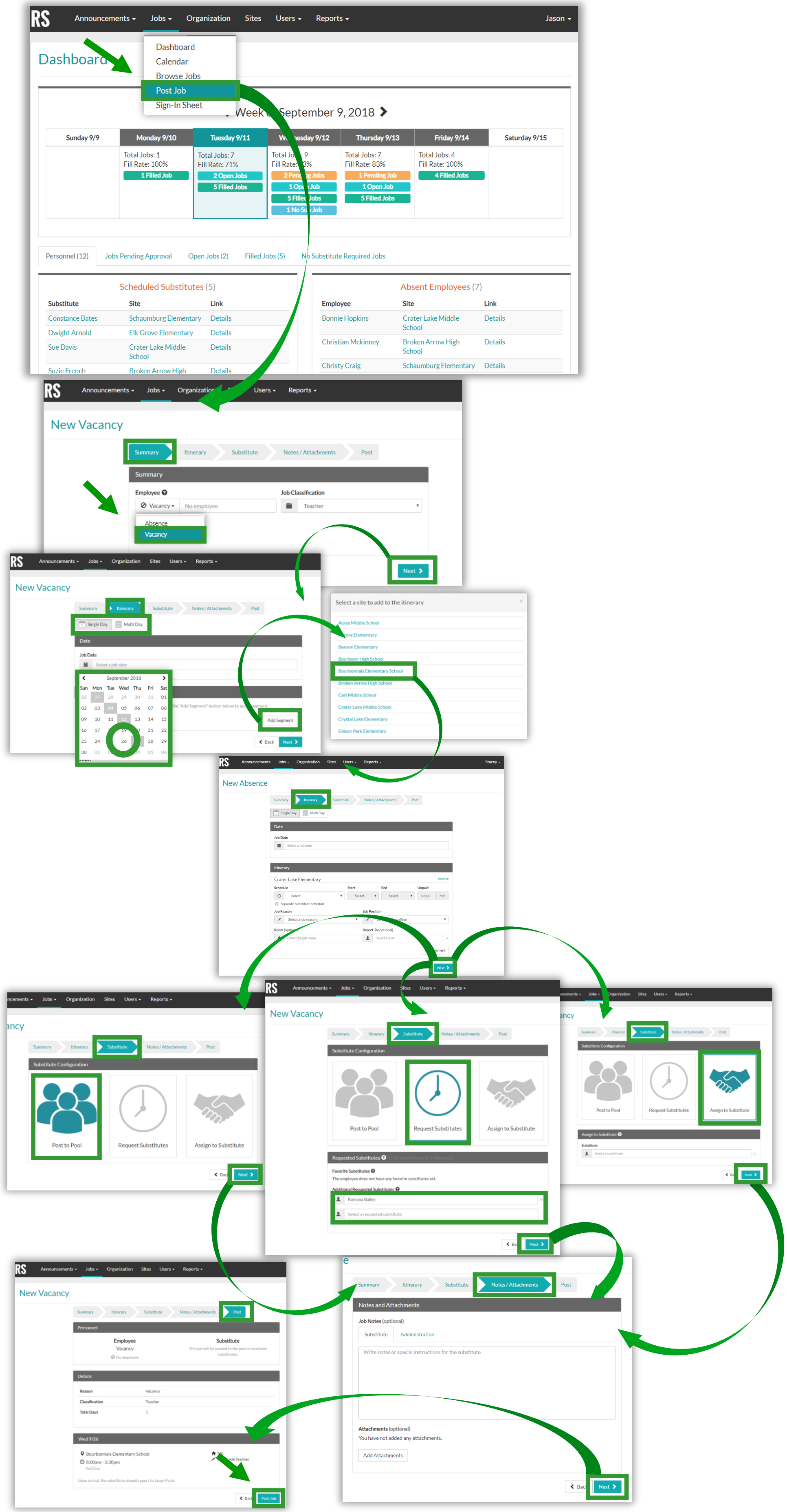
To post to the pool select Post to Pool followed by the Next button.

To request one or more substitutes, click the Add button next to Requested Substitutes and choose your substitute(s). All requested substitutes and employee favorites will have 72 hours from the time the job is submitted or until 5:00PM local time the night before (whichever is sooner). If the job is still open after the requested period has expired, ReadySub will automatically post the job to all qualified and available substitutes. The 72 hour and 5PM settings can be adjusted for your organization as well.

To assign a substitute directly to a job, click the Assign Substitute (handshake) option followed by the Substitute field and choose any substitute that meets the classification and scheduling requirements of the job.

Step 4 - Notes and Attachments: Add notes to substitutes and/or administrators and attach up to 5 files.

Step 5 - Post: Review then click Post Job and you will be taken directly to the details page of the now posted job.



Approve an Absence

With ReadySub, administrators can approve employee absences for any absence reason. For absences that require approval, administrators can be notified via email of the pending absence request and/or view the absence from your account with the ability to approve or deny it.

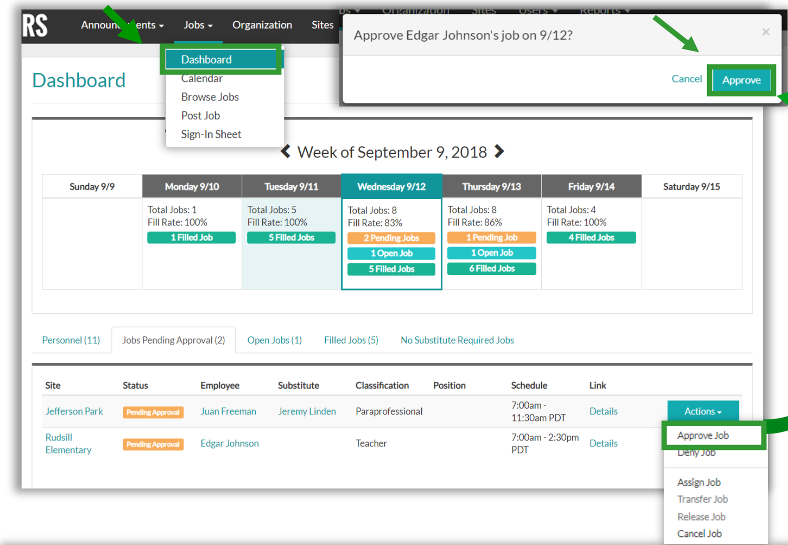
Approving a pending absence request can take place from the administrator Dashboard, Calendar or Browse Jobs page. To approve from the administrator Dashboard or Calendar, simply click on the Pending Approval button follow-up by the Actions drop down and you will be given the option to approve or deny the request. If you would like to view the request's details before approving, just click the Details link. You also have the option of editing the absence request's start time, end time, job position, classification, absence reason, report to person and room number, and substitute prior to approval.

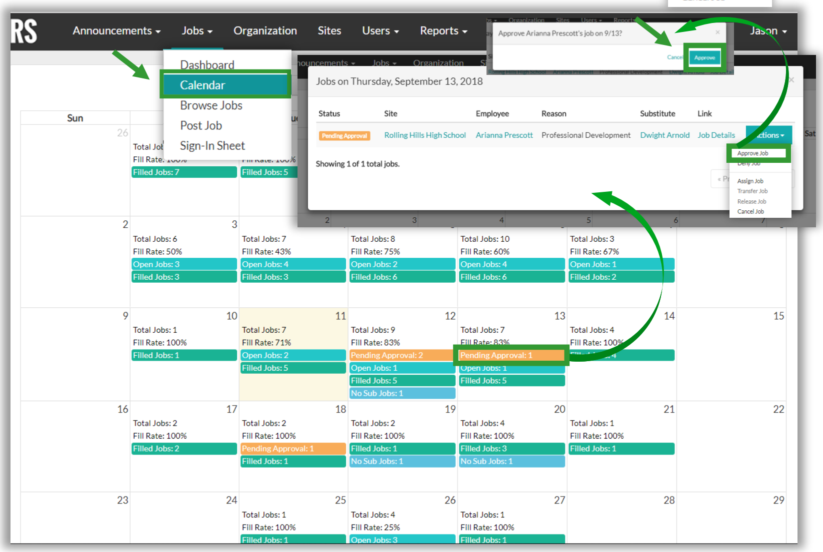
To approve an absence from the Browse Jobs page, click on the Actions button then Approve or Deny. To view the details of an absence prior to approving, click on the Details of that absence. You can also access all jobs requiring approval from the Browse Jobs page by checking the Pending Approval filter to the left of the screen.

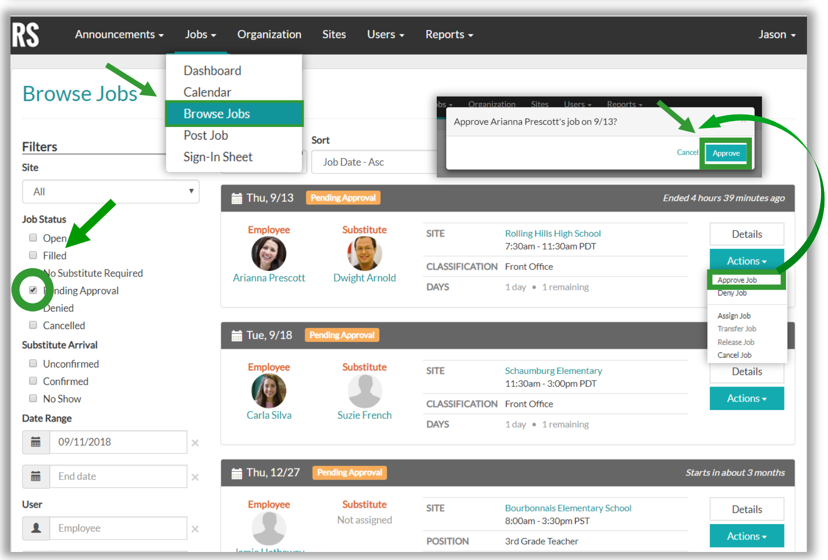
Once you approve or deny the absence request, your employee will be notified via email and/or text message with the ability to view your response from their account. If the employee has assigned a substitute prior to approval he/she will also be notified as well.

Absence types that do not require approval will be sent to your substitutes right away. There is an additional option to configure your organization so that ReadySub does not hold substitutes notifications for approval and instead notifies them right away. To enable this setting, contact your ReadySub support team.

In all scenarios, you can still receive notifications when absences are created and accepted and view/approve them from your account.



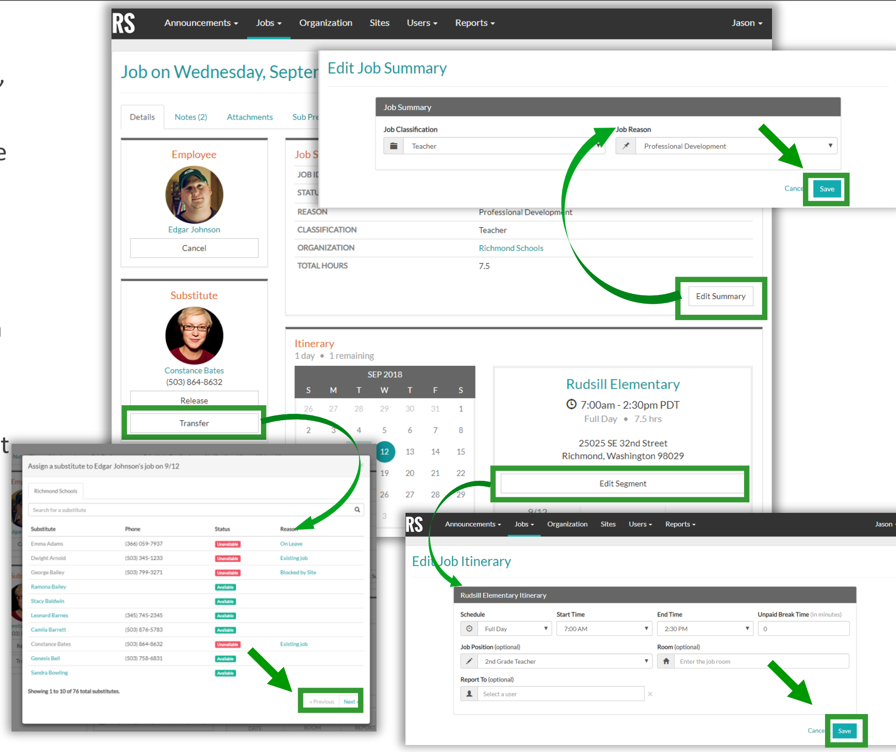




Edit an Absence

Administrators can edit a job's schedule type, start and end times, room number, classification, position, absence reason, and assigned substitute (if any). To make these edits, navigate to the job's Details page from your Dashboard, Calendar, or Browse Jobs page.

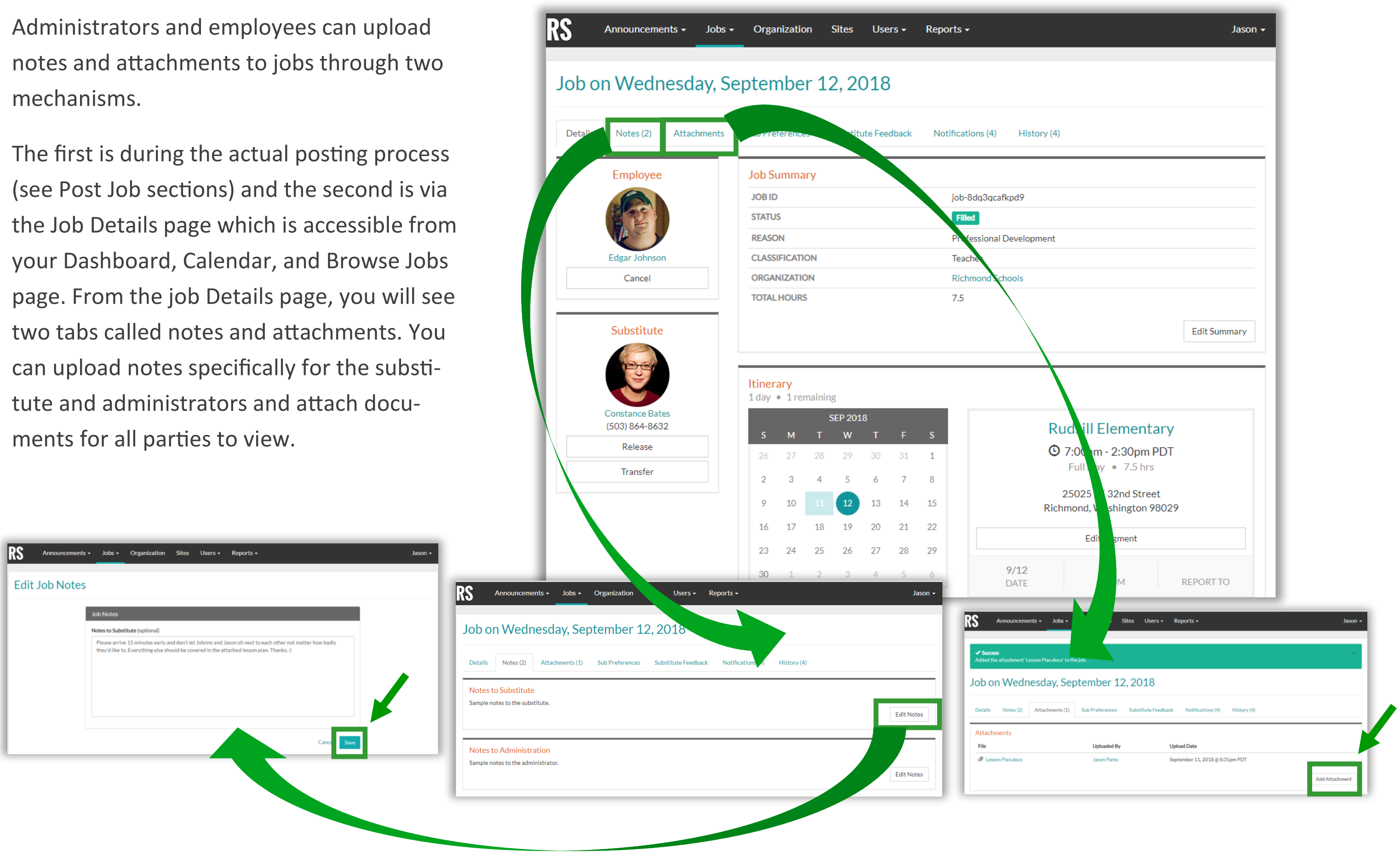
From Job Details page, select Edit Segment or Edit Summary to edit the relevant fields. You can also update the substitute settings by clicking Transfer, Release, Assign, Switch to Required or Switch to Not Required depending on the current status of the job and what you'd like to accomplish. You can add notes and attachments to any job (Add Notes & Attachments section).



Add Notes & Attachments

Administrators and employees can upload notes and attachments to jobs through two mechanisms.

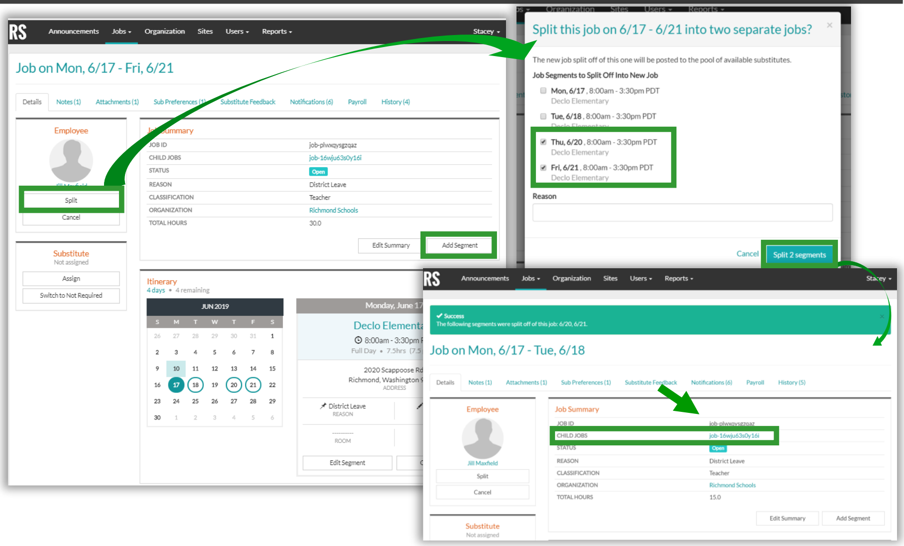
The first is during the actual posting process (see Post Job sections) and the second is via the Job Details page which is accessible from your Dashboard, Calendar, and Browse Jobs page. From the job Details page, you will see two tabs called notes and attachments. You can upload notes specifically for the substitute and administrators and attach documents for all parties to view.



Split an Absence

To split an absence that already has multiple segments, all you need to do is click the Split button from the Details page and select which segments you would like to split out. Once split, ReadySub will automatically split the segments out into their own absence. To quickly navigate between absences that have been split you can use the Child Job and Parent Job links on the details page of the absence.

To split an absence with only 1 segment you will need to first add a segment to the existing absence. Make sure the new segment start/end times don't overlap with the original segment.

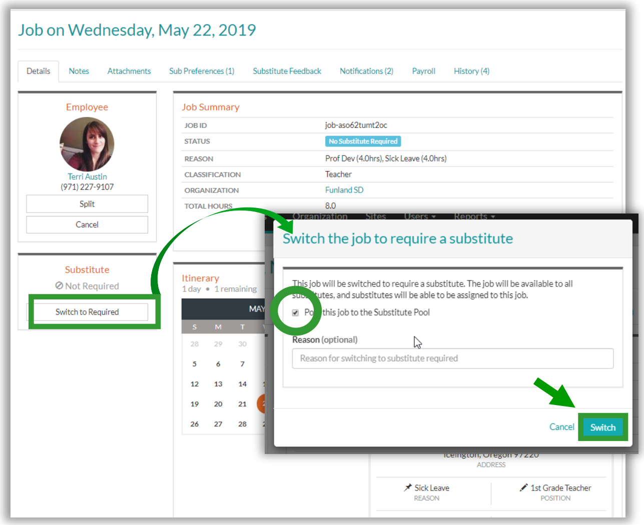


Switch An Absence from No Substitute Required to Sub Required

To switch a no substitute required absence to an absence that is sub-eligible, navigate to the Details page of the absence and click the Switch to Required button.

ReadySub will prompt you to add a reason for the switch which is optional, and ask if you would like to post the job to the pool of available/qualified substitutes.

To post the job to the pool, simply keep the Post to this job to the Substitute Pool box checked and click Switch. If you would rather assign a specific substitute to the new job, just uncheck the box and ReadySub will not send any notifications to the general pool.

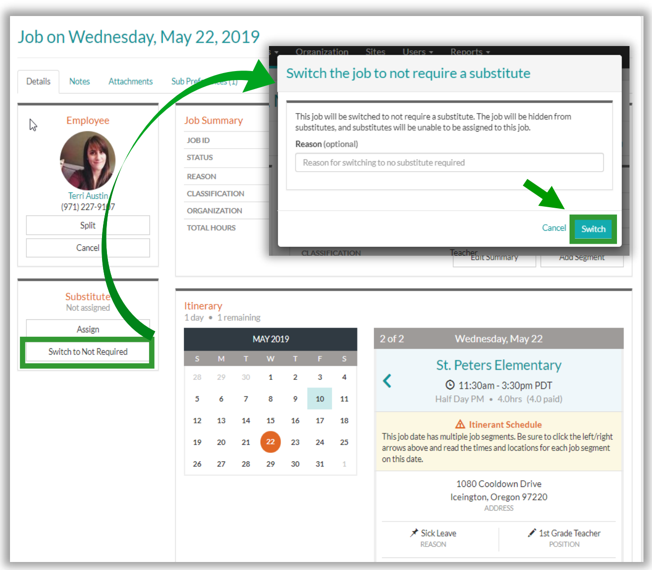


Switch An Absence from Substitute Required to No Sub Required

To switch a substitute required absence to no substitute required absence, navigate to the Details page of the absence and click the Switch to Required button.

ReadySub will prompt you to add a reason for the switch which is optional.

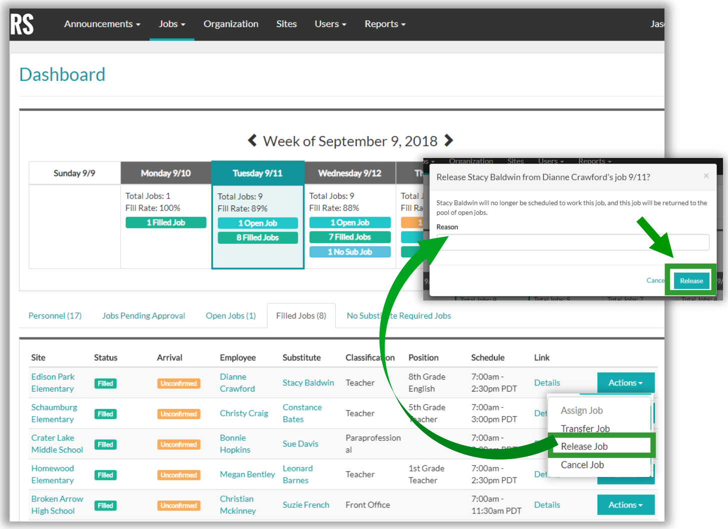
If the absence is already filled, you will need to release the substitute from the absence prior to using the switch to not required functionality.



Release a Substitute

As an administrator you can release a substitute from a job at any point via the Dashboard, Calendar, and Browse Jobs page.

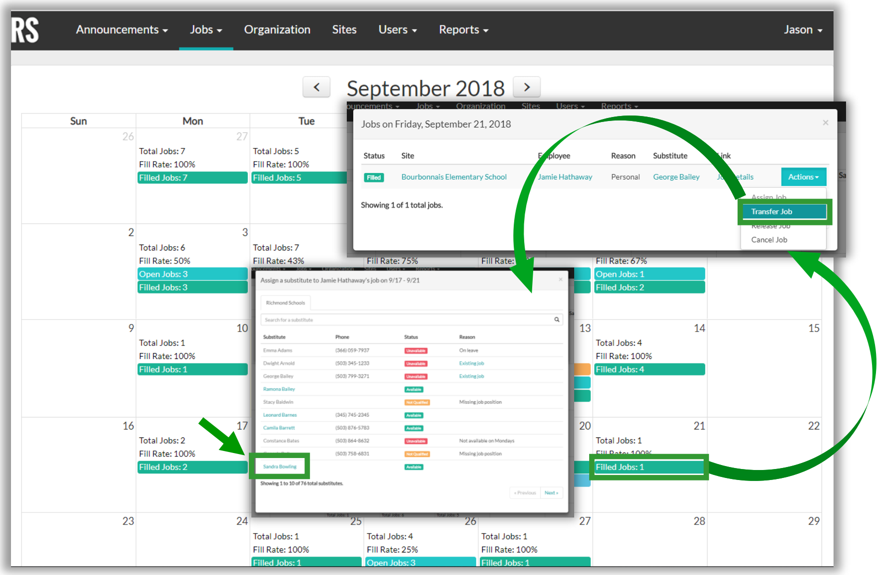
Using the Dashboard as an example, search for the job via the Week at a Glance. Once you've located the job, select the Actions drop down followed by Release Job. You will be prompted to confirm the release, at which point the previous substitute will be notified that he/she has been released and all other available and qualified substitutes will be notified of the new available job.



Transfer Substitutes

As an administrator you can transfer a job from one substitute to another at any point via the Dashboard, Calendar, and Browse Jobs page.

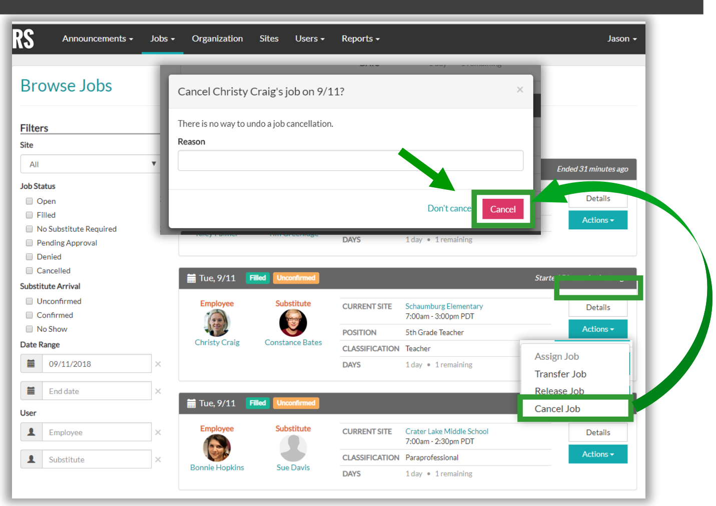
Using the Calendar as an example, search for the date of the job and click the corresponding Filled button. You will be prompted with a pop-up listing all of the filled jobs for that day. Once you've located the job, select the Actions drop followed by Transfer Job. You will see a pop-up listing the available substitutes for transfer. Select your substitute followed by Confirm to finalize the transfer. Once confirmed, the previous substitute will be notified of their release and the new substitute will be notified of their assignment.



Cancel an Absence

Administrators can cancel jobs at any point from the Dashboard, Calendar, and Browse Jobs page.

Using the Browse Jobs page as an example, search for the job by employee and date. Once you've located the job, select the Actions drop down followed by Cancel Job. You will be prompted with a pop-up asking you to confirm the cancellation. Upon confirming, the employee and assigned substitute (if applicable) will receive notifications that the job has been cancelled.

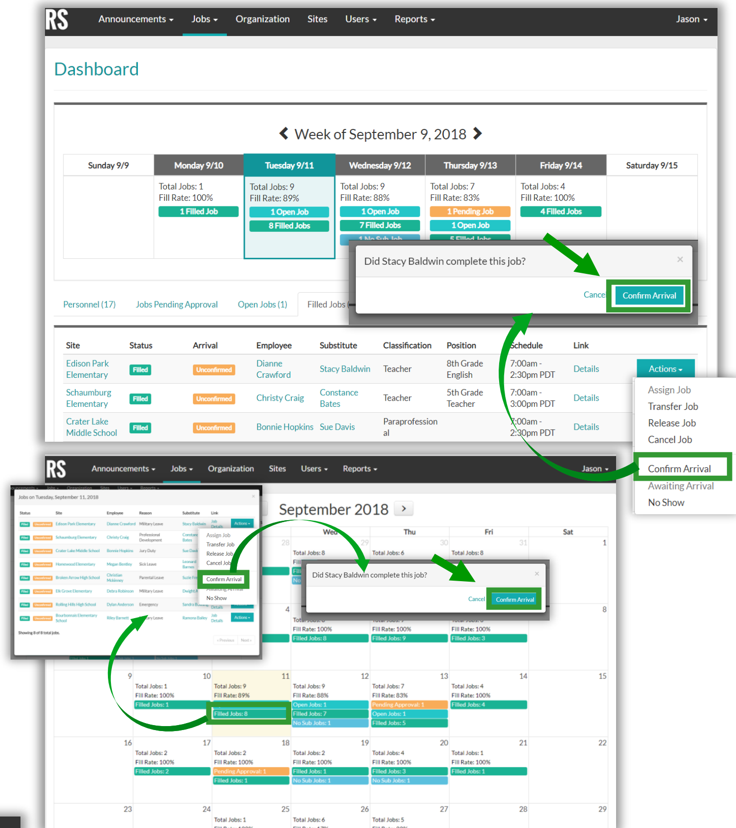


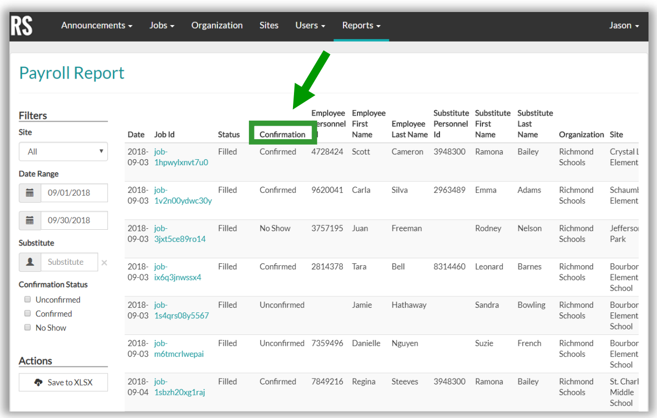
Confirm Substitute Arrivals

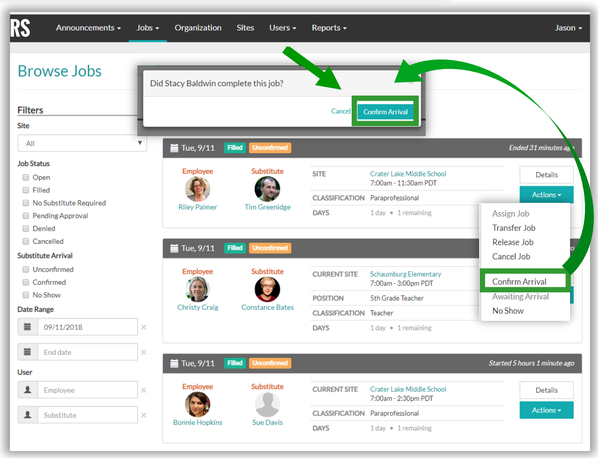
Administrators can confirm that a substitute has arrived at their scheduled job site within the ReadySub system. Simply print off the “Sign-In Sheet” (see “Sign-In Sheet section below) for your substitutes to sign upon arrival. You can then confirm the arrival of a substitute from your Dashboard, Calendar, Browse Jobs, and Job Details pages.

Once a substitute’s arrival is confirmed, ReadySub will show the job as Confirmed on the administrator Dashboard, Browse Jobs page and in the Payroll Report. If the substitute fails to show for the job, you can select the No Show option.

Substitute arrivals can be confirmed up to 2 hours ahead of the job’s start time. You can also edit the status after the job has started. With respect to reconciliations, the confirmation status of each job is located in the Payroll report and any Custom Reports that have Job Confirmation field added.



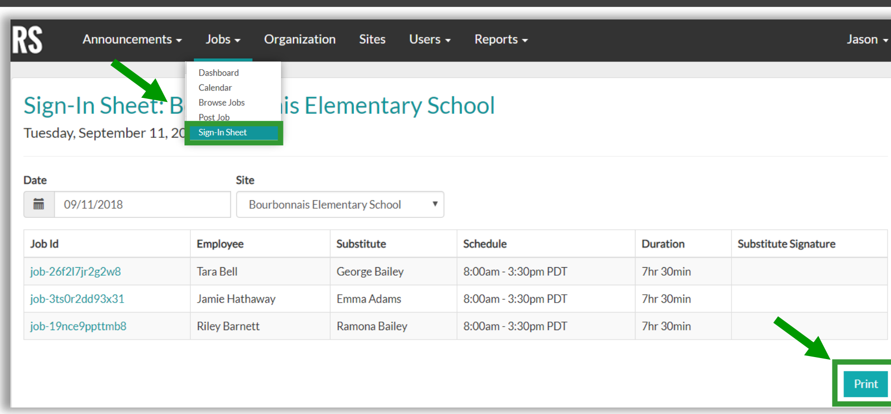




Sign-In Sheet

ReadySub administrators can print daily Sign-In sheets to confirm substitute arrivals from the main Jobs drop down. Included in these sign-in sheets is the employee name, substitute name, schedule, job duration, and column for the substitute signature.

The sign-in sheet is viewable and printable for the entire organization or for each site. To print the sign-in sheet, click Print.



Job Notification Details

ReadySub offers administrators a detailed view of the notifications sent for each job.

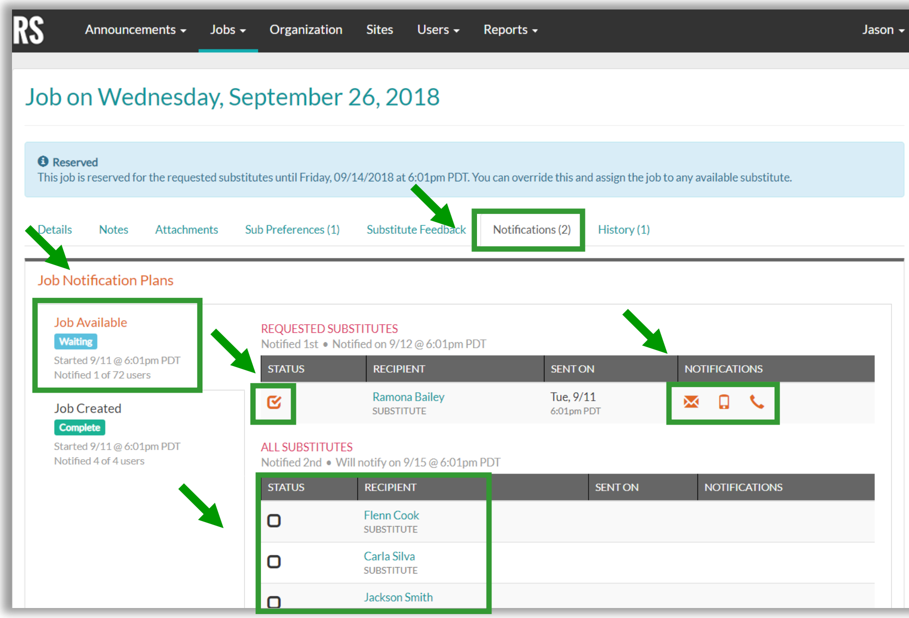
You can see which substitutes, employees, and administrators were notified, how they were notified, and when. You can even watch ReadySub send out notifications in real-time!

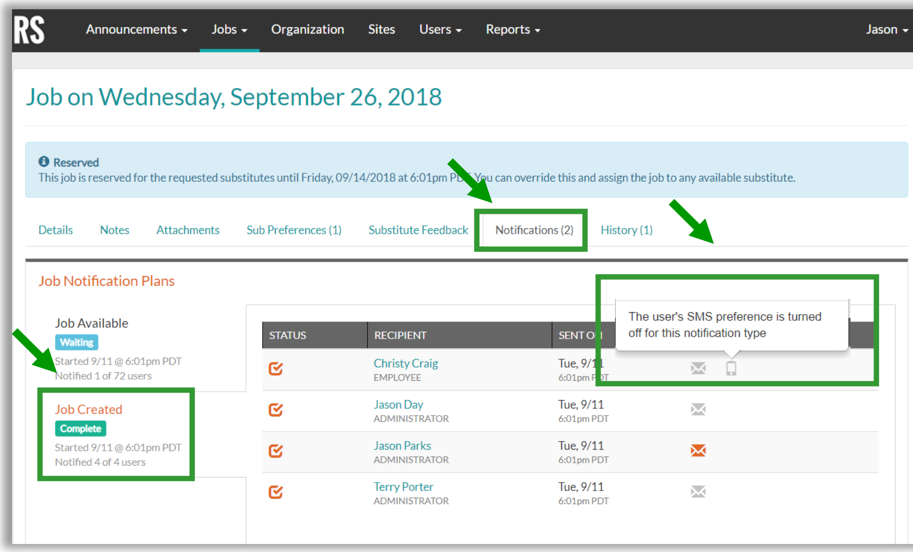
The job on Wednesday, September 26th is currently being held for substitute Ramona Bailey. Ramona is the only one requested for this job and ReadySub notified her via email, SMS, and phone on at 6:01PM on Tuesday September 11th. The requested duration is set to expire at 6:01PM on September 14th. If Ramona does not accept the job by that time, ReadySub will release the job to the pool and notify Flenn Cook, Carla Silva and any other available and qualified substitutes.

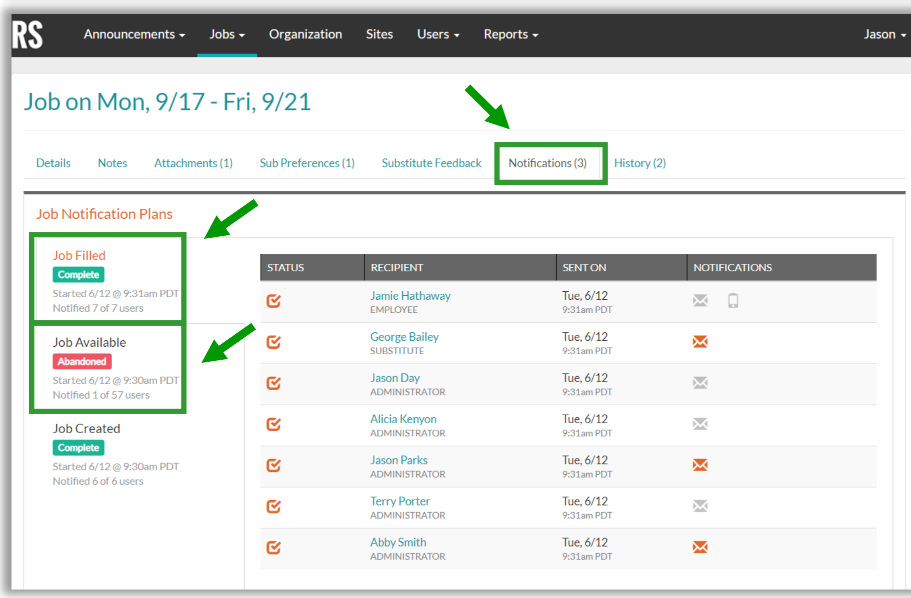
The Job Created notification tab shows that three administrators and one employee could have been notified but only administrator Jason Parks received the notification. In addition to showing you who was notified, ReadySub highlights why someone was not notified. In this case, the employee Christy's SMS preference was not turned on.

For the job from September 17th to September 21st, three different notifications were sent out. The first notification was when the job was created, the 2nd notification was when the job became available to substitutes, and the 3rd notification was when the job was filled.

Under the Job Available notification is the term "Abandoned" which means that ReadySub was told (for a variety of reasons) to stop its notifications before completing the list. In this case it was because the Requested Substitute accepted the job before ReadySub had finished notifying the pool of substitutes. This can also happen if a job is cancelled or an administrator assigns a substitute to the job prior to everyone in the pool being notified.





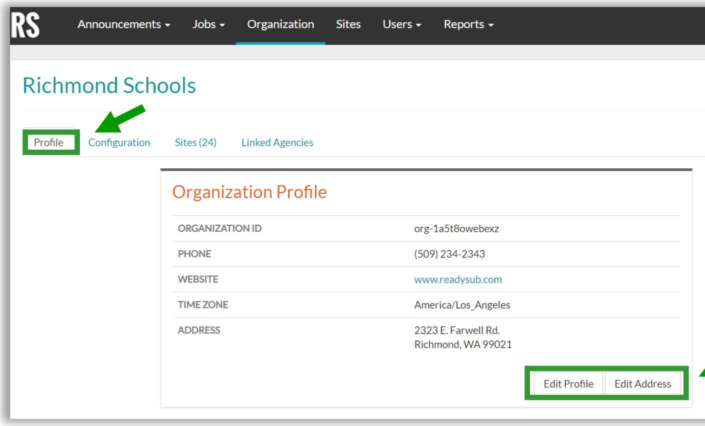


What is an Organization?

An Organization is the parent entity and has one or more Sites operating beneath it. The relationship between an organization and its sites can be compared to that of a district and its schools. Organizations have employees, administrators, and in many cases substitutes. Several ReadySub parameters are set at the organization level including job reasons, job positions, and job classifications. Organizations can also set schedules for each of their sites.

Organization Profile

The Organization Profile includes your organization's name, ReadySub ID, physical address, phone number, web URL and time zone. You can edit this info from the Edit Profile and Edit Address buttons.

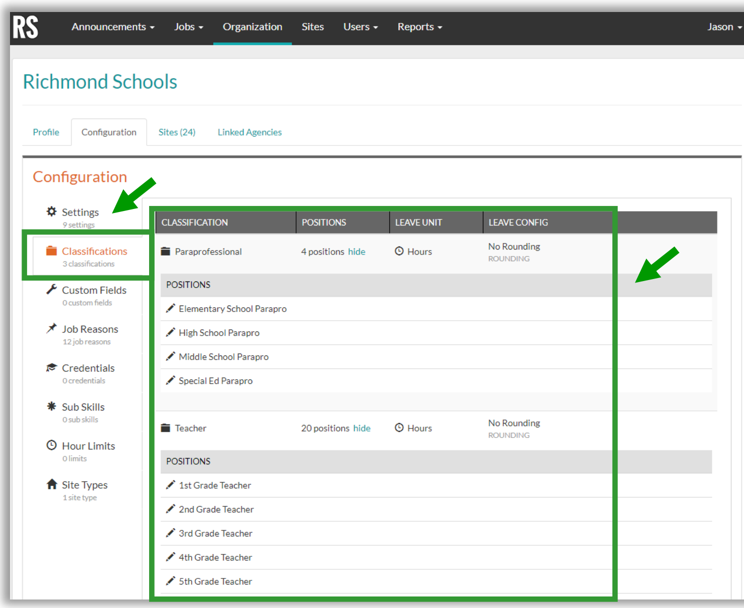


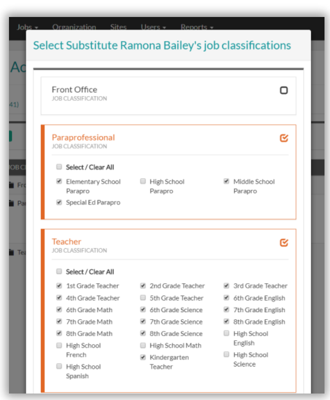
Job Classifications & Positions

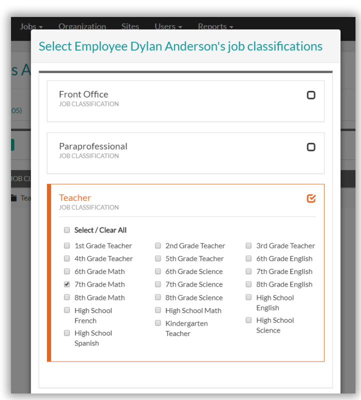
An Organization's Job Classifications are a core piece of ReadySub and influence what your substitutes can work, what your employees are (employee type), and the types of jobs your administrators can view. Classifications can also influence which job reasons your employees can select (see "Job Reasons by Site & Classification" section). Employees can have a maximum of one classification where substitutes can work as many classifications as are in the organization setup.

Job Positions are a subset of their parent classification and influence what your substitutes can work as well as your employee type. Classifications must have at least one position and often times many as in the case of the Teacher classification. The ReadySub team will work with you to setup a classification and positions framework that best matches your process. Any updates to this setup will also require the help of ReadySub as this is fundamental piece of each network's architecture.

When a substitute is tagged with a classification they can work all job positions under that classification as a default. However, these positions can be edited from the substitute's profile. If the substitute has a job's classification and underlying position, they can view/accept the job. To view your Job Classifications & Positions, select Organization followed by the corresponding tab.







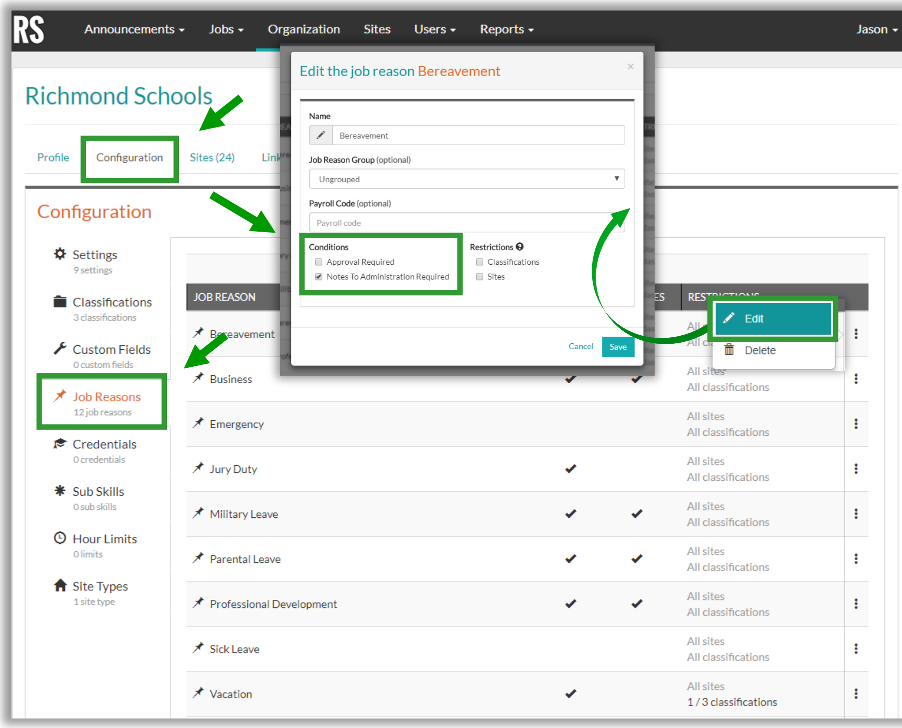
Absence Reasons & Settings

Job Reasons are set at the Organization level and selected during the absence submission process.

A key determination for each reason is if it requires administrator approval. Absences submitted by employees with reasons that require approval will not go out to substitutes until approved. Absence submitted by employees with reasons that do not require approval will automatically go out to substitutes (if sub-eligible). Absence submissions made by an administrator are always auto-approved.

Reasons can also require notes to the administrator. If turned on, the employee will be prompted to enter notes to administrator pertaining to the selected reason.

To edit reason approvals and mandatory notes, go to the “Reasons” tab and click the three dots adjacent to the reason you’d like edit followed by the “Edit” button.



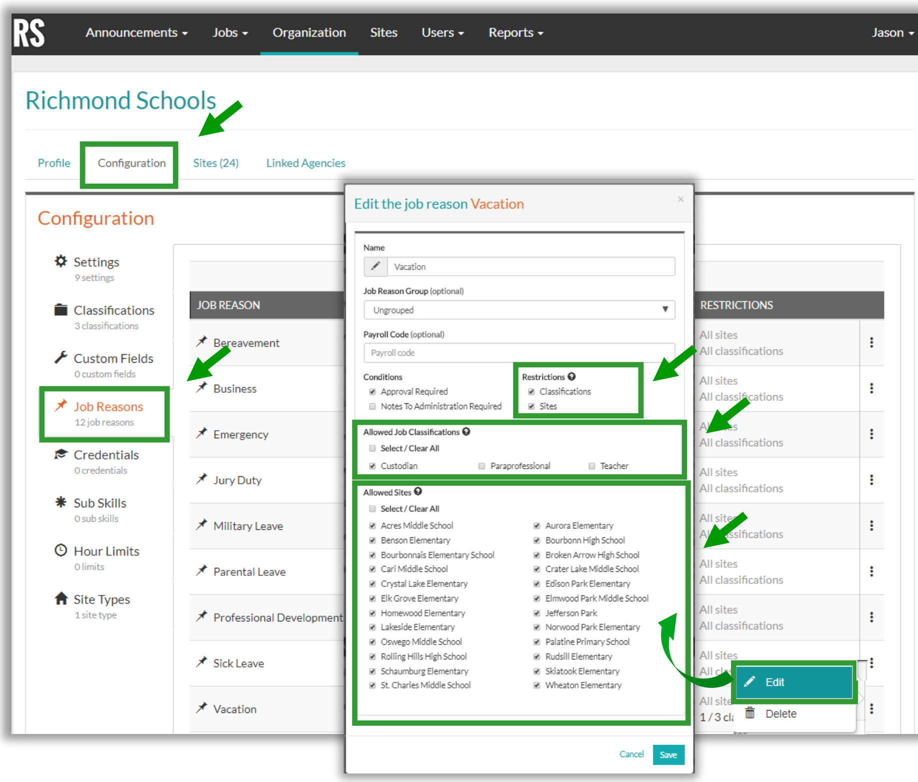
Absence Reasons by Classification & Site

Job Reasons can be filtered by classification and site so they are only visible to certain employees.

This filtering also pertains to administrator absence submissions when posting on behalf of an employee.

To filter reasons down by classification and/or site go to Organization then the Reasons tab and click the three dots followed by Edit.

Please note, duplicate reason naming is not supported in ReadySub so different Sick Leave reasons for example will require unique names.

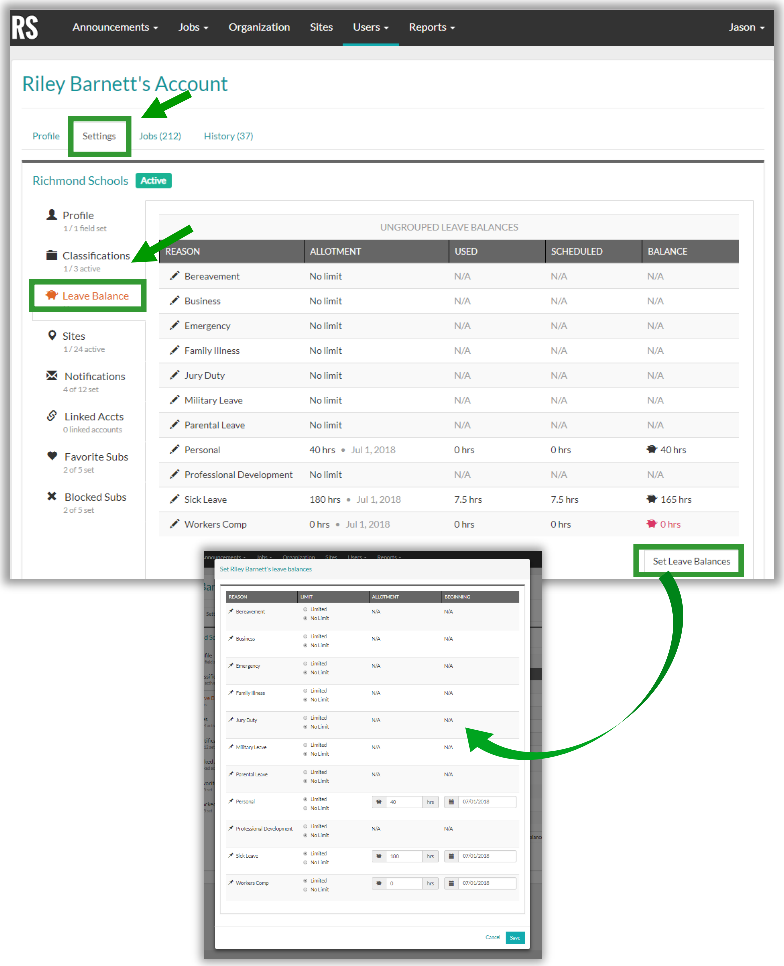


Employee Leave Balances

ReadySub can track employee leave balances <u>in days or hours</u> and automatically deduct leave. ReadySub also prohibits employees from submitting absences when their balance has hit “0” for an enforced job reason.

Administrators can view and edit leave balances for individual employees by navigating to their Profile, followed by the Settings tab then Leave Balances tab. From the Leave Balances tab you can review your employee’s initial allotment, any past and future absences that are drawing on that allotment, and the actual balance for the relevant reasons.

To edit your employee leave balances click the Set Leave Balances button to produce the pop-up. You can then set the allotment for each of the corresponding reasons by selecting “Limit” then entering the allotment (in hours or days depending on your setup) followed by the beginning date of the balance.

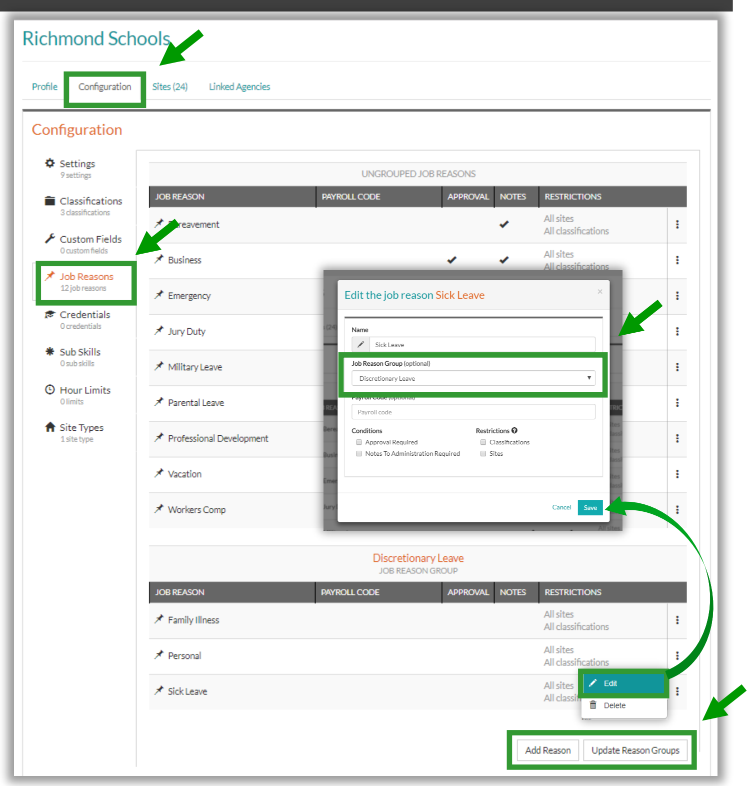


Leave Balance Groups

In addition to tracking leave balances for specific job reasons, ReadySub allows reasons to be grouped together and draw from the same bank of hours. We call these Job Reason Groups.

To set up a job reason group, navigate to the Organization page followed by the Configuration tab then the Job Reasons tab. At the bottom of the screen you will see an Update Reason Groups button which will allow you to create and name your first group (Discretionary Leave for example).

Once the job reason group has been created you can add the relevant job reasons by editing the reason and selecting the job reason group from the corresponding drop down. Once the reason group has been created and the appropriate reasons have been added you can then add balances to your employee accounts for the reason group and even add balances for individual Reasons within the group, applying their own cap as well.



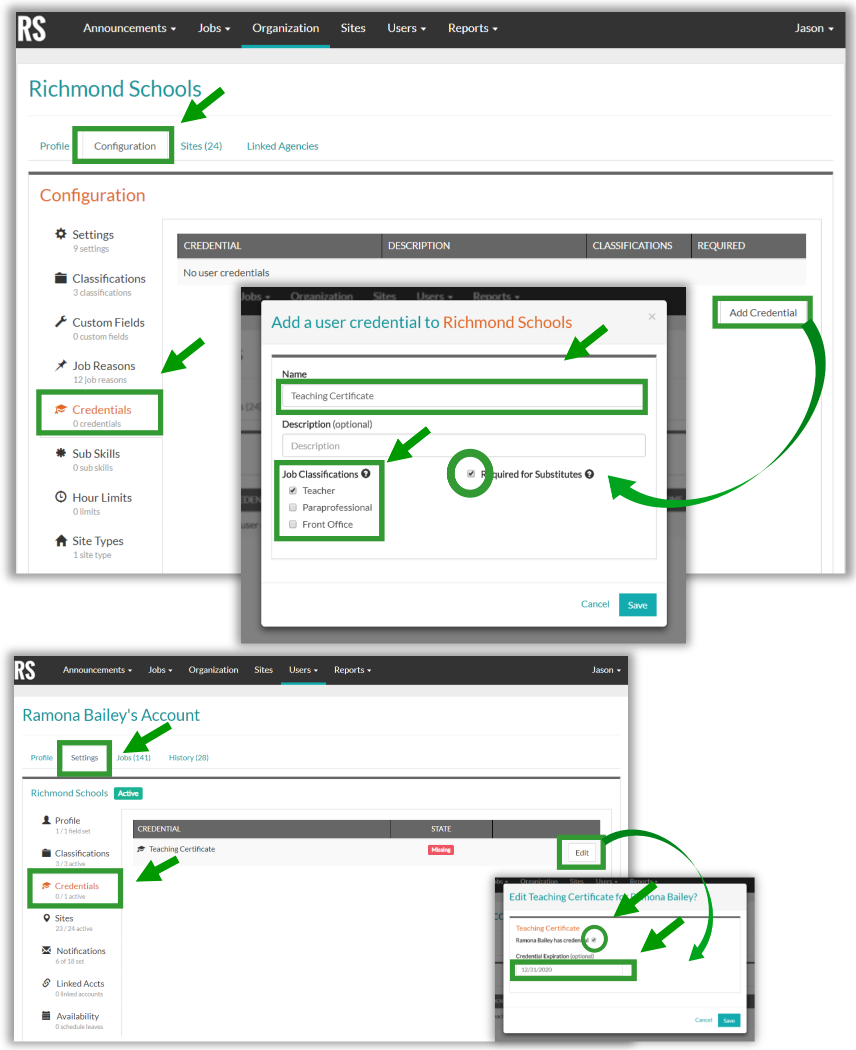
Substitute Credentials

Substitute credentials are set at the job classification level and allow expiration dates to be attached to any substitute with the relevant classification.

When a substitute credential is mandatory, ReadySub automatically removes jobs from the view of any substitutes with an expired credentials, and will not show jobs past the expiry date even when the date of expiry is in the future.

To add a substitute credential to your network, navigate to the Organization page then the Configuration tab followed by the Credentials tab. From the Credentials tab click the Add Credential button, enter the name of the credential and add the appropriate classifications. You can also set the credential to be optional or mandatory.

Once the credential has been created, you can go into any substitute account via the Browse Users page and add their expiration date. Just go to the substitute's Settings tab followed by the Credentials tab to make the addition. Upon arrival, you will see the substitute is missing the newly created credential which you can add by clicking Edit and entering the date of expiry.



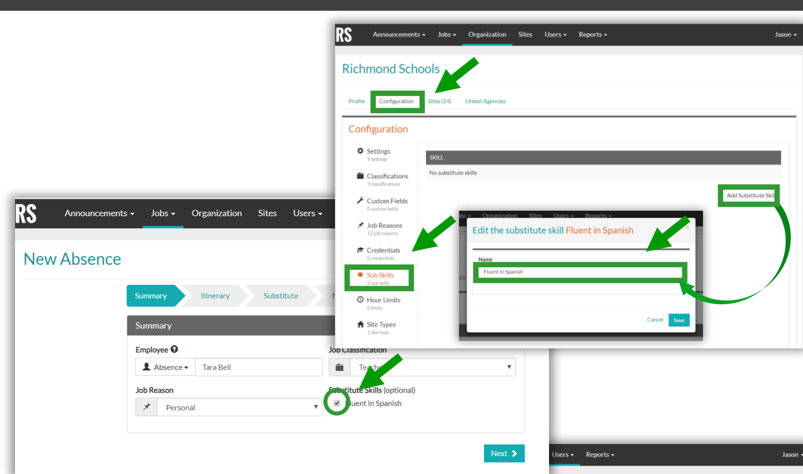
Substitute Skills

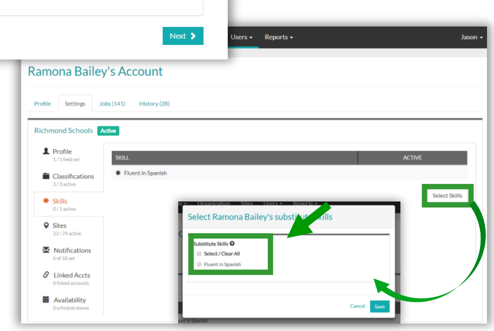
Substitute Skills is another tool ReadySub offers for matching substitutes to jobs. Similar to ReadySub's classifications and positions, skills prohibit substitutes from viewing and accepting jobs where they do not have the associated skill. Common skills include Spanish speaking, long-term, and male or female in the case of early childcare.

To add a Skill, navigate to Organization then the Configuration tab followed by the Sub Skills tab. From the Sub Skills tab click the Add Substitute Skill button and enter the name of the Skill.

Once a skill has been created, you can access any substitute account via the Browse Users page to add the appropriate skill.

Skills are also automatically added to the first page of the job posting process for your employees and administrators to select.



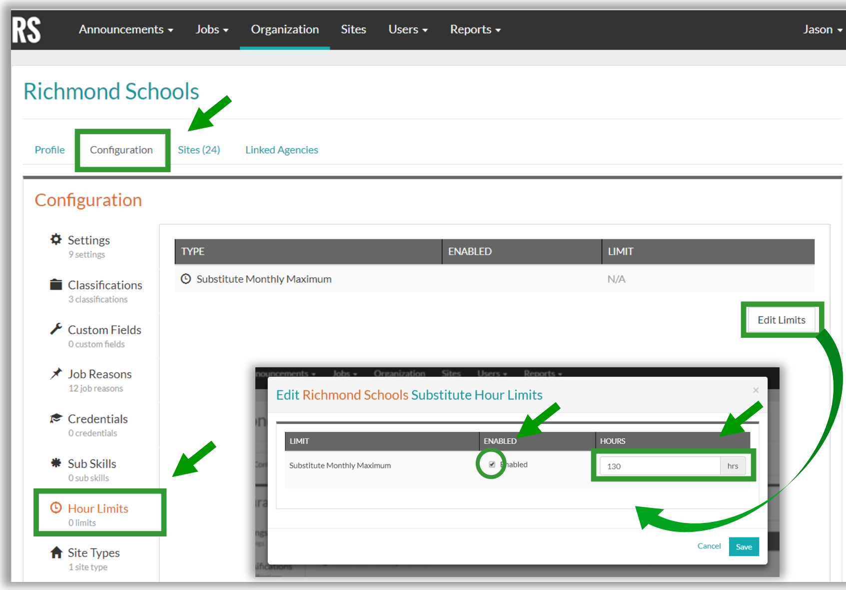


Substitute Hour Limits

ReadySub allows organizations to limit the number of hours substitutes can work per month. This feature can be used to comply with ACA or other requirements around substitute hours worked.

To set substitute hour limits, navigate to the Organization page followed by the Configuration tab and the Hour Limits tab. From the Hour Limits tab, click the Edit Limits button and enable the limit. You can then can enter the hourly max which will apply to all substitutes.

Substitutes are unable to view/accept jobs that put them above the hourly limit within a calendar month. Administrators can also see that substitutes have hit their monthly limit when attempting to request or assign them to a specific job.



Additional Organization Settings

Additional Organization Settings exist to help maximize the ReadySub experience and can be updated by the ReadySub team at any point.

The Employee Assign Job setting can prohibit your employees from assigning substitutes directly to jobs.

The Organization Substitutes Enabled setting is for any organization that has its own substitutes.

The Allow jobs for Inactive Employees and Substitutes setting gives administrators full access to ReadySub prior to activating their employees and substitutes.

The Required Job Position setting mandates the Job Position field be populated during all job posts.

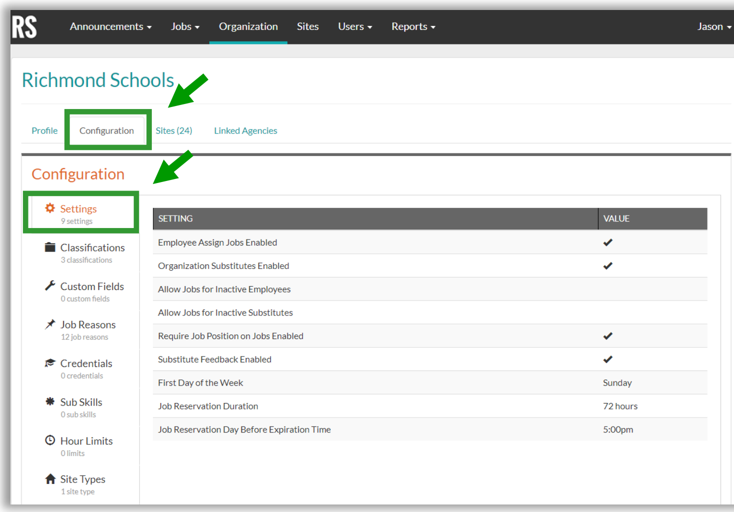
The Substitute Feedback Enabled setting populates the customizable Substitute Feedback Survey.

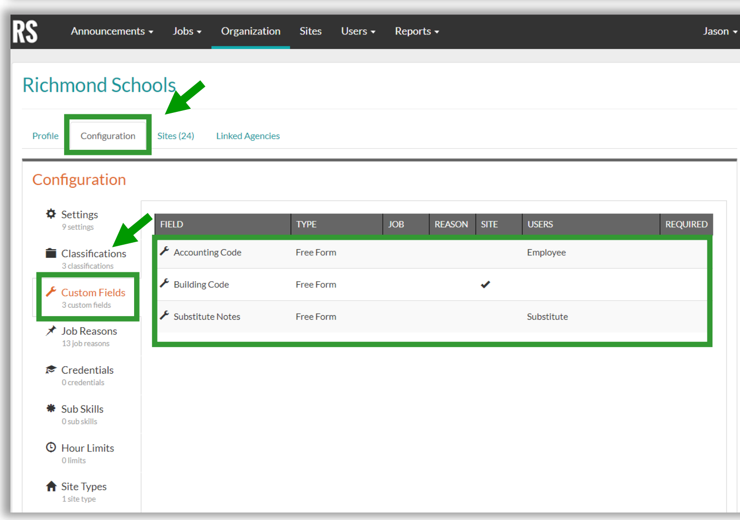
The First Day of Week setting allows the Week at a Glance and Calendar start dates to be adjusted.

The Job Reservation Duration and Day Before Expiration Times settings determine how long ReadySub holds a job for substitutes when requested.

Custom Fields allow additional fields to be created and populated at multiple tiers of the ReadySub system.

ReadySub supports outbound Calling for substitutes as a premium service. To learn more about the calling feature and pricing, ask your ReadySub representative.





Creating Blackout Calendars

ReadySub Blackout Calendars allow tracking of non-workdays and in service days so your employees are only entering absences and requesting substitutes when they should be.

Blackout Calendars can be assigned to multiple employees and multiple calendars can be created for the same organization. See the “Employee Calendars” section for how to assign a blackout calendar to an employee.

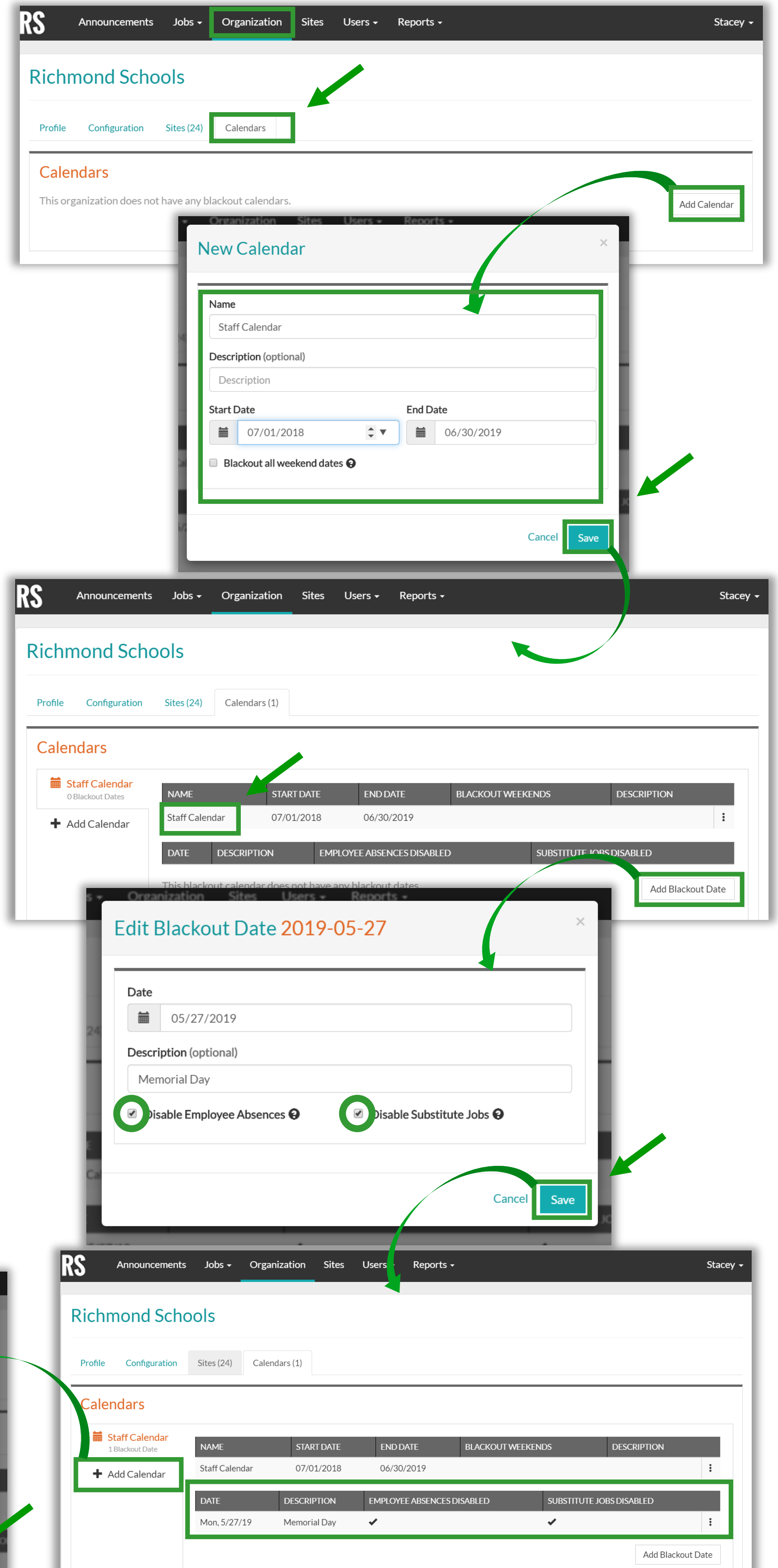
To create a Blackout Calendar, navigate to Organization tab followed by the Calendars tab and click Add Calendar. Enter the name, description, and start/end dates of the calendar. You can also Blackout all weekend dates.

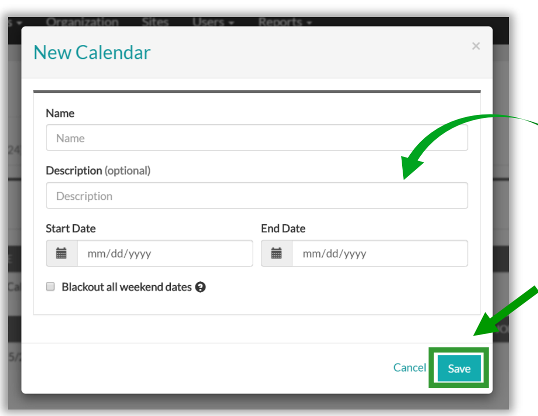
Once a blackout calendar is created, you can start adding no absence blackout dates and no substitute blackout dates.

No Absence blackout dates are dates where absences cannot be entered by or for the employees with the calendar such as on holidays. To add no absence blackout dates, select the “Disable Employee Absences” and Disable Substitute Jobs” options.

No substitute blackout dates are dates where absences can be entered by and for employees but they are no substitute absences. These absences can be overridden by an administrator in order to assign a substitute. To add no substitute blackout dates, select the “Disable Substitute Jobs” option but not the “Disable Employee Absences” option.

To edit or delete an existing blackout date, click the three dots next to the date followed by the edit or delete option. To add a new blackout



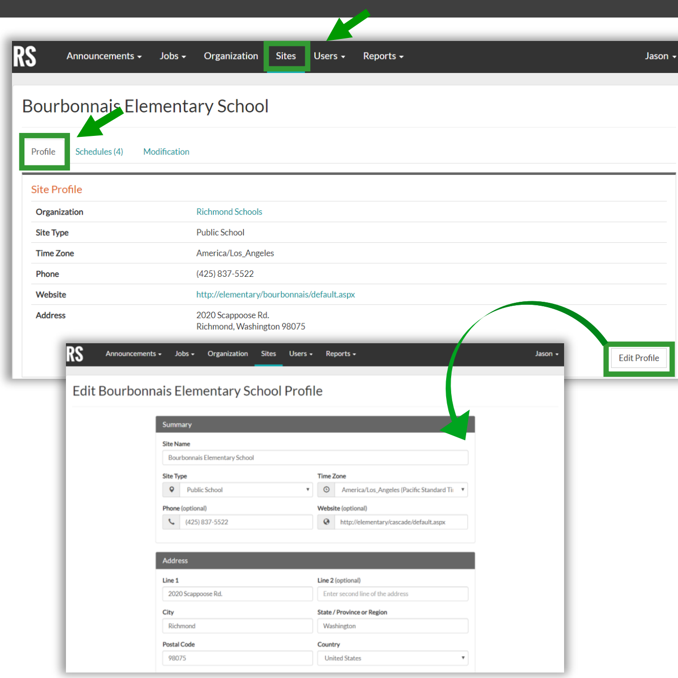


What is a Site?

A Site operates underneath its parent Organization as a school operates under its parent district. Sites can have employees, administrators and substitutes as well as their own set of schedules. Sites also have profile information including name, address, phone number, URL, and time zone.

Site Profile

The site profile provides contact information for the site and is unique from its parent organization and sister sites. To view and/or update your site information, click the Sites tab followed by the name of the site. Within the site Profile tab, select Edit Profile and update the site's information accordingly.



Site Schedules

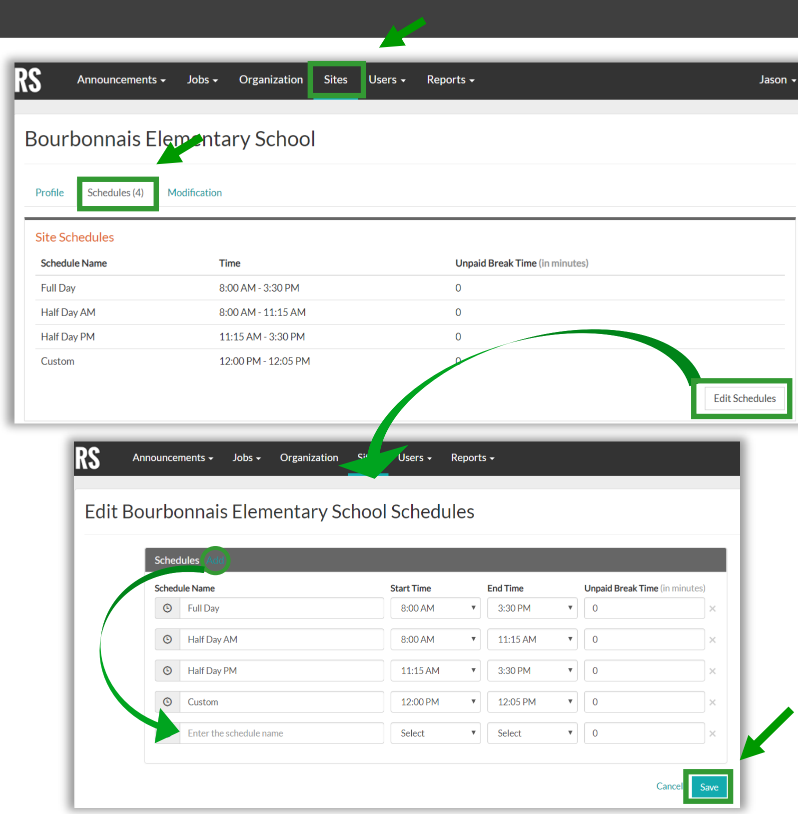
Each site has its own set of schedules and start/end times which can be edited via the corresponding Sites page.

To edit your site schedules click the Sites tab followed by the site name then the Schedules tab and Edit Schedules.

Schedule names, start/end times, and breaks can be edited from this page. New schedules can also be created by clicking the Add button.

Site schedules are accessible to employees when posting absences. The schedule type is also listed in the ReadySub payroll report.

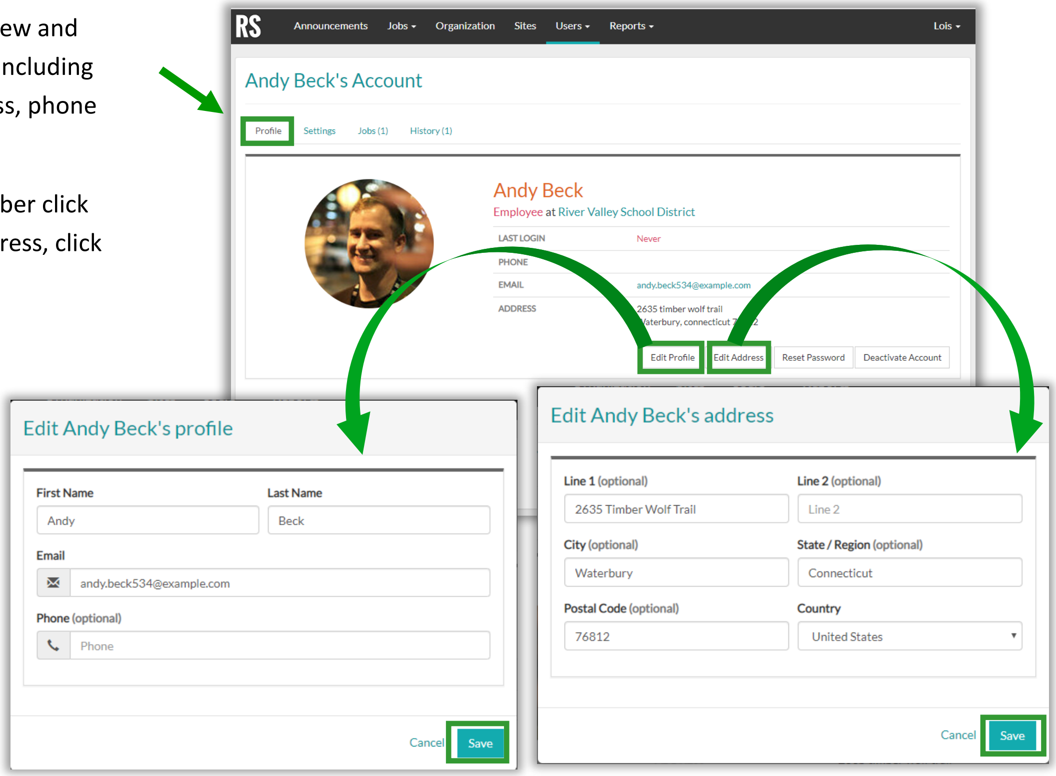
Employees can also update the start/end times during the job post if different from the default start/end times of the selected schedule.



Edit your Employee Profiles

As a ReadySub administrator, you can view and edit your employee profile information including their first name, last name, email address, phone number and address.

To edit their name, email or phone number click the Edit Profile button. To edit their address, click the Edit Address button.

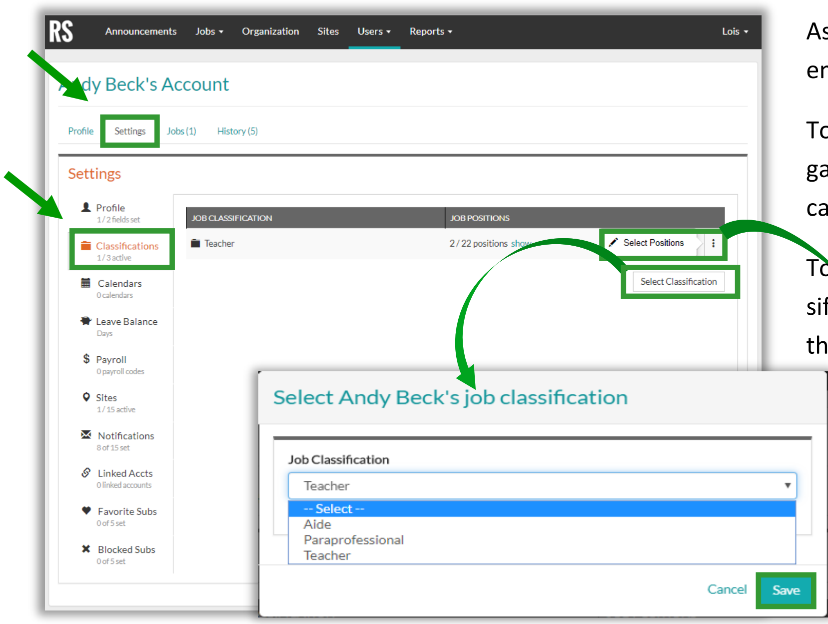


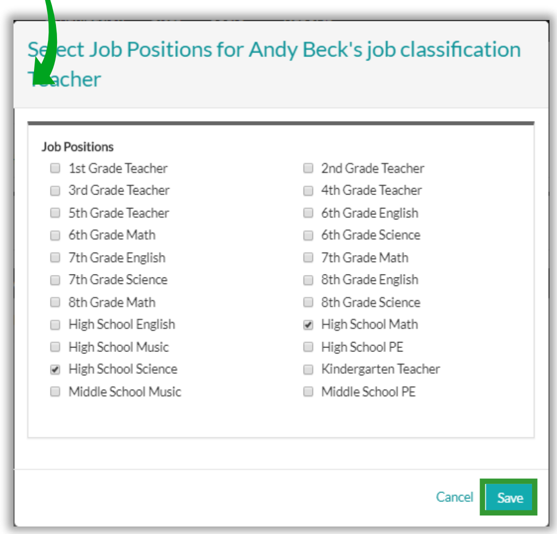
Edit your Employee Classifications & Positions

As a ReadySub administrator, you can view and edit your employee job classifications and positions.

To view an employee's job classifications and positions, navigate to their Profile and Settings tab followed by the Classifications tab.

To edit an employee's job classification, click the Select Classification button. To edit an employee's job position, click the 3 dots next to Select Position followed by Edit.





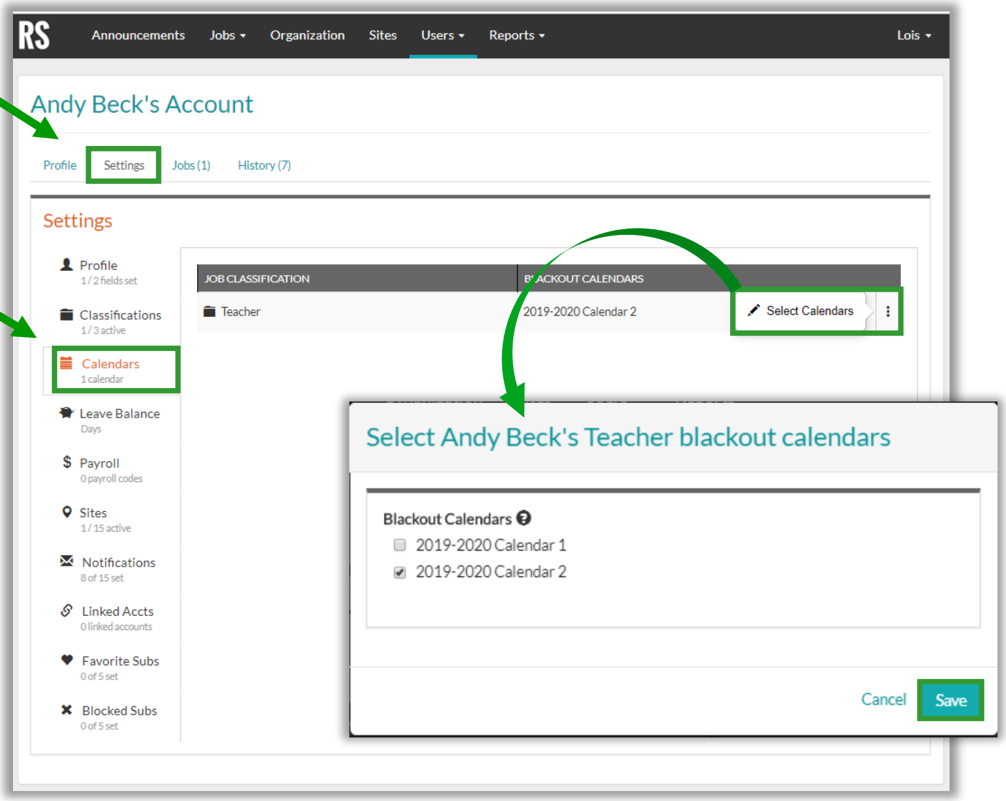
Edit your Employee Calendar

As a ReadySub administrator, you can view and set blackout date calendars for your employees to restrict the days of the year they can post absences and request substitutes.

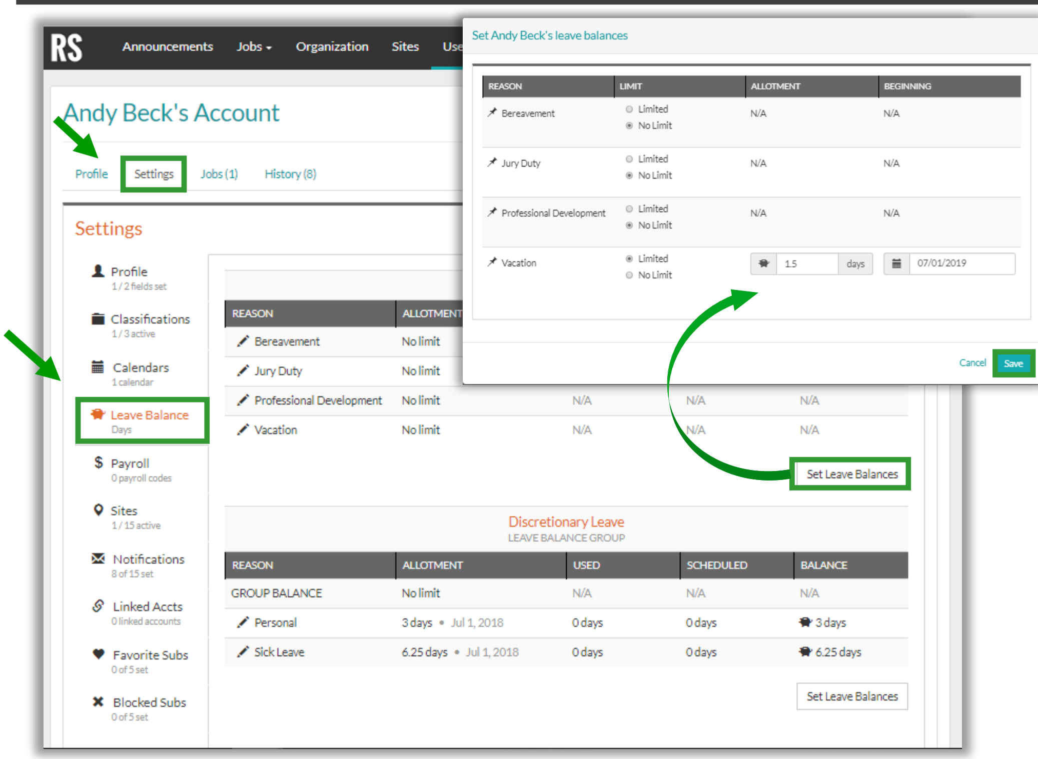
To view/edit your employee's job blackout date calendar, navigate to their Profile and Settings tab followed by the Calendars tab.

To edit an employee's blackout date calendar, click the 3 dots next to Select Calendars followed by Select Calendars

Once saved, the employee's absence posts will be limited to the days where they can enter an absence and request a substitute as specified in their blackout calendar.



Edit your Employee Leave Balances



As a ReadySub administrator, you can set and monitor your employee leave balances.

To view/edit your employee leave balances, navigate to their Profile and Settings tab followed by the Leave Balance tab.

To edit an employee's leave balances, click the Set Leave Balances button and add the balance and allotment date (day the balance is given) to the reason(s).

Once saved, the employee will be able to view their leave balance from their profile and the reason drop down when posting an absence. If the organization's balances are enforced the employee will not be able to surpass a zero balance.

Edit your Employee Payroll Codes & Percentages

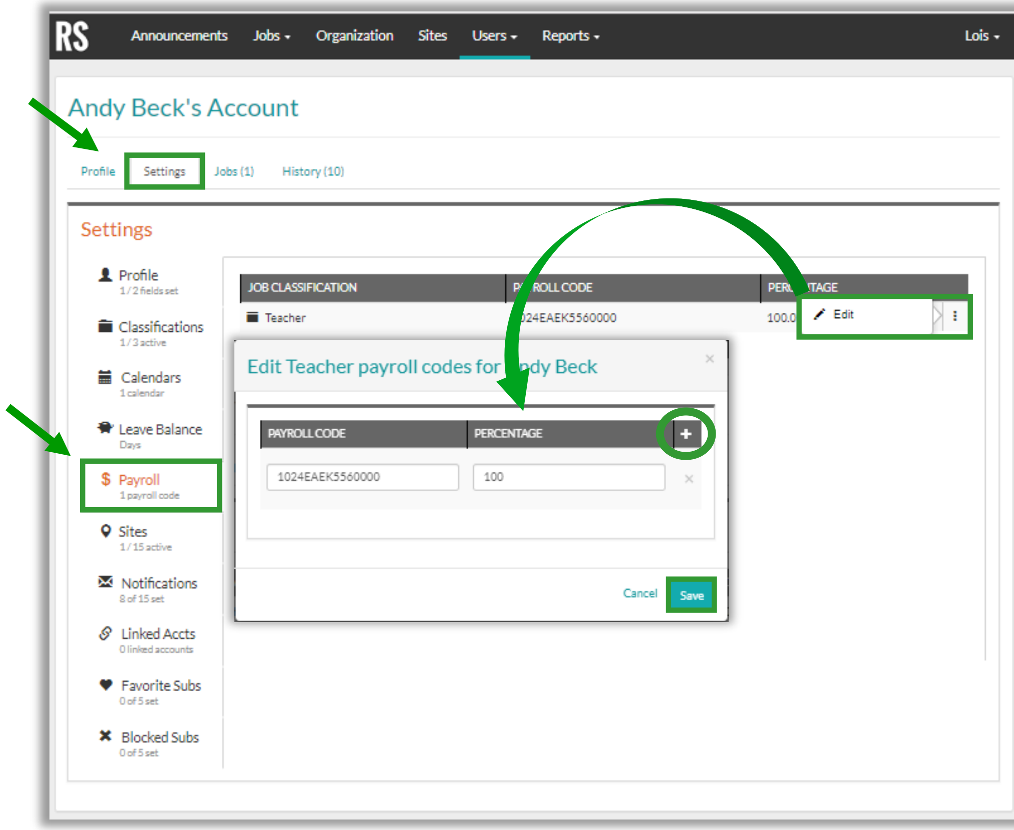
As a ReadySub administrator you can view and edit your employee payroll codes and percentages.

To view and edit payroll codes, navigate to your employee's profile followed by the Settings tab and Payroll tab.

You will see the employee's job classification, any payroll codes that have been set for the employee. Click the three dots followed by the Edit button to edit your employee's payroll codes.

Each of your employees have multiple payroll codes (up to 10 in total). To add multiple codes and %'s just click the plus button to add.

Click the Save button to finalize the updates.

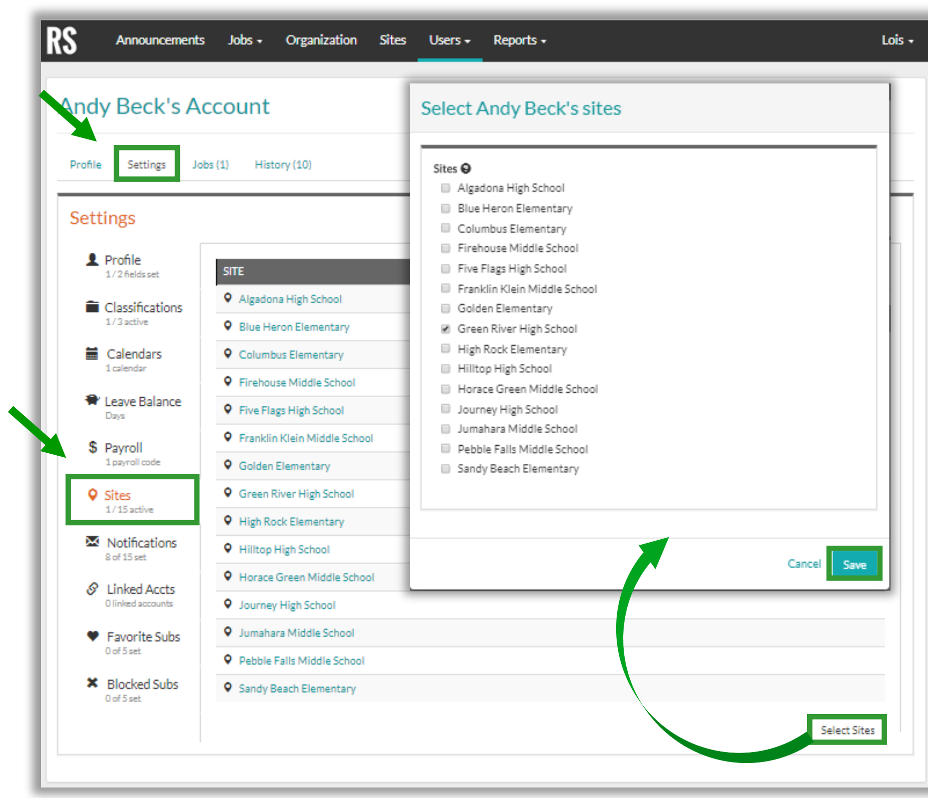


Edit your Employee Sites

As a ReadySub administrator, you can view and edit your employees' site or sites.

To edit your employee sites, navigate their profile followed by the Settings tab, then the Sites tab and click the Select Sites button.

A list of the sites in your organization will populate. Check the relevant sites and click Save to finalize the update.



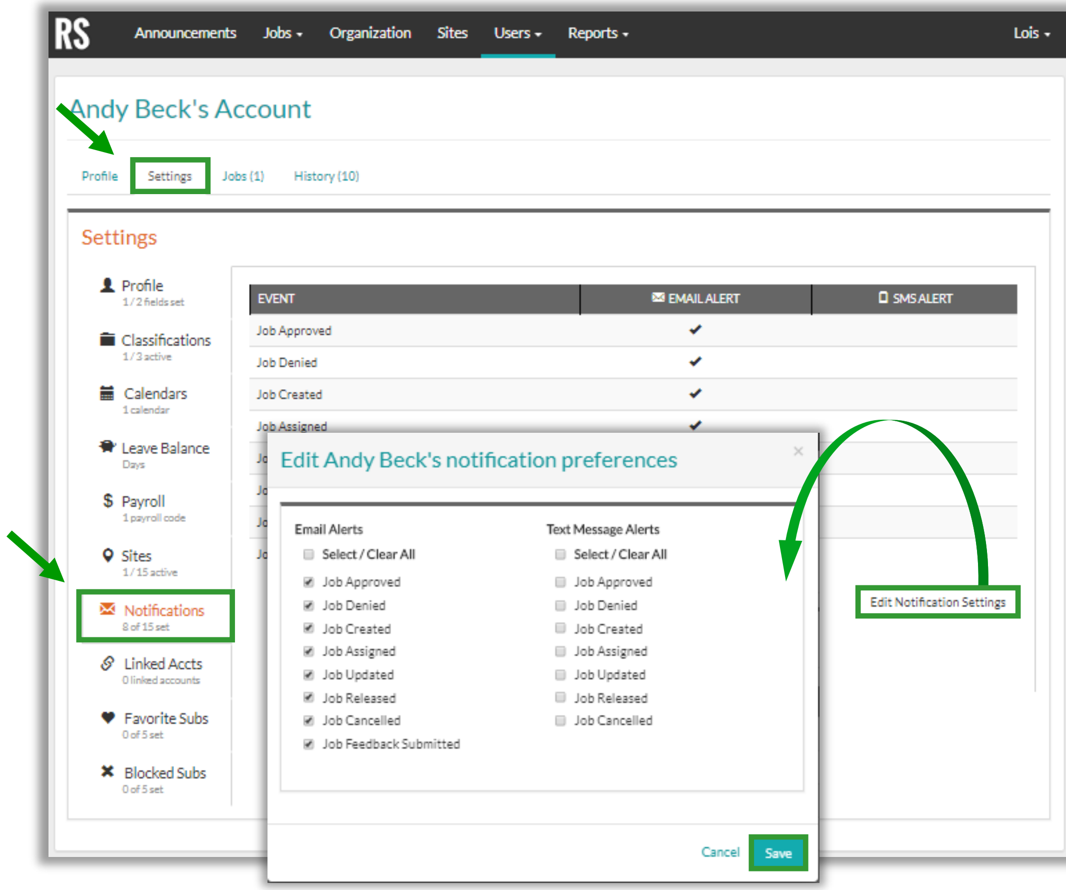
Edit your Employee Notifications

As a ReadySub administrator, you can view and edit your employee notification preferences which are text message and email.

To edit your employee notifications, navigate to Users then Browse Users followed by any employee profile.

Once on an employee profile, navigate to the Settings tab followed by the Notifications tab.

Click the Edit Notification Settings button and check/ uncheck the relevant notifications for your employee.



Edit your Employee Favorite & Blocked Substitutes

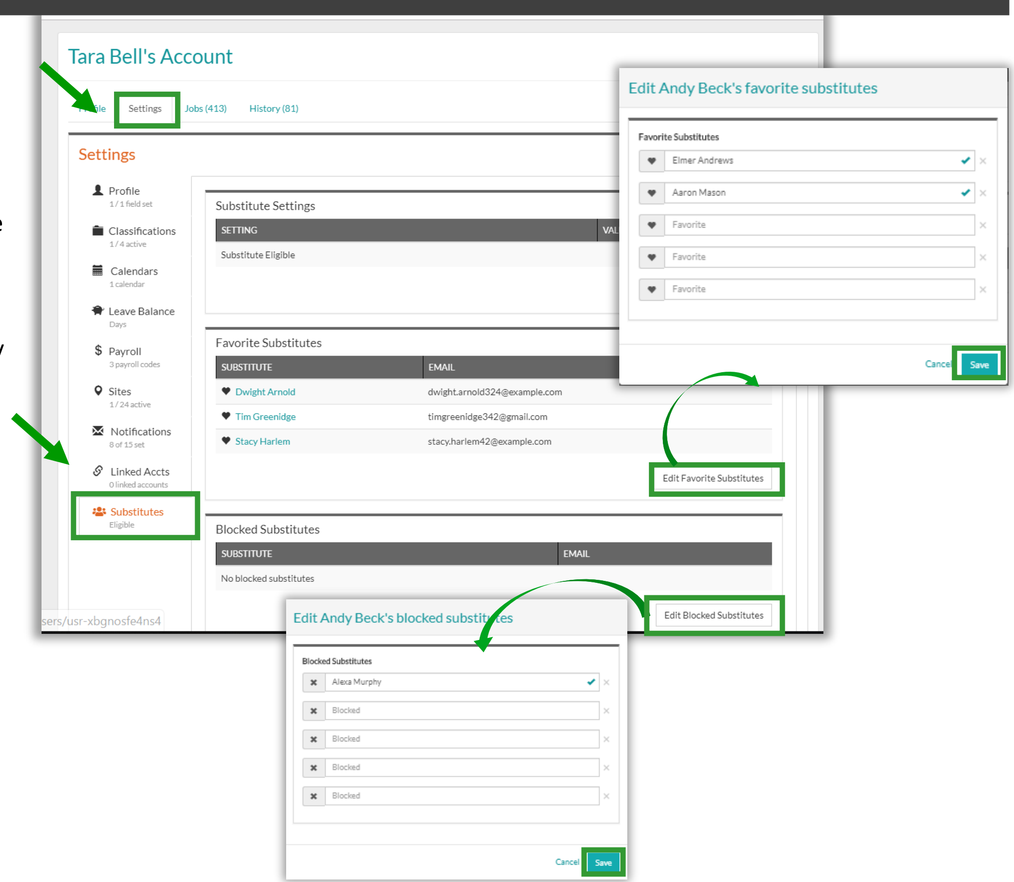
ReadySub Employees can have up to five favorite substitutes, and five blocked substitutes.

Favorite substitutes receive a priority notification and automatically populate into each of the employee's absence posts.

Blocked substitutes are unable to view/ accept jobs for the employee in question.

To view or edit one of your employee's favorite or blocked substitutes, locate their profile from the Browse Users page followed by the Settings tab then the Substitutes.

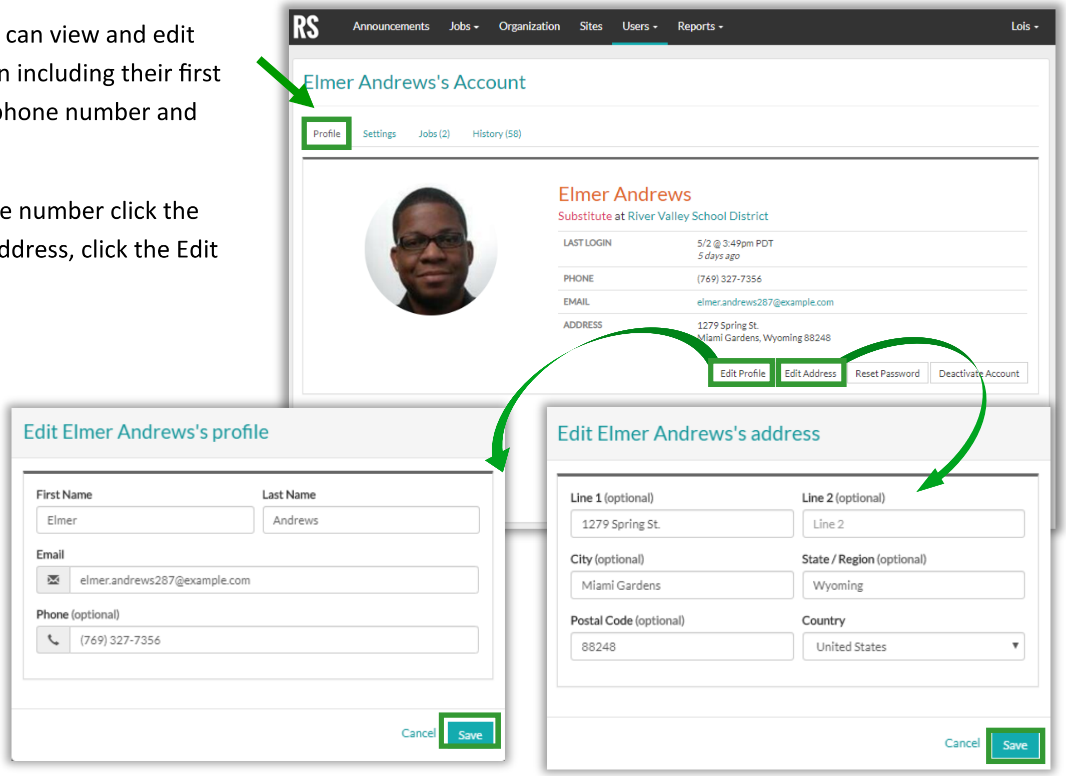
To Edit, click the Edit Favorite Substitutes or Edit Blocked Substitutes buttons which will produce pop-up where you can search for and save the substitutes.



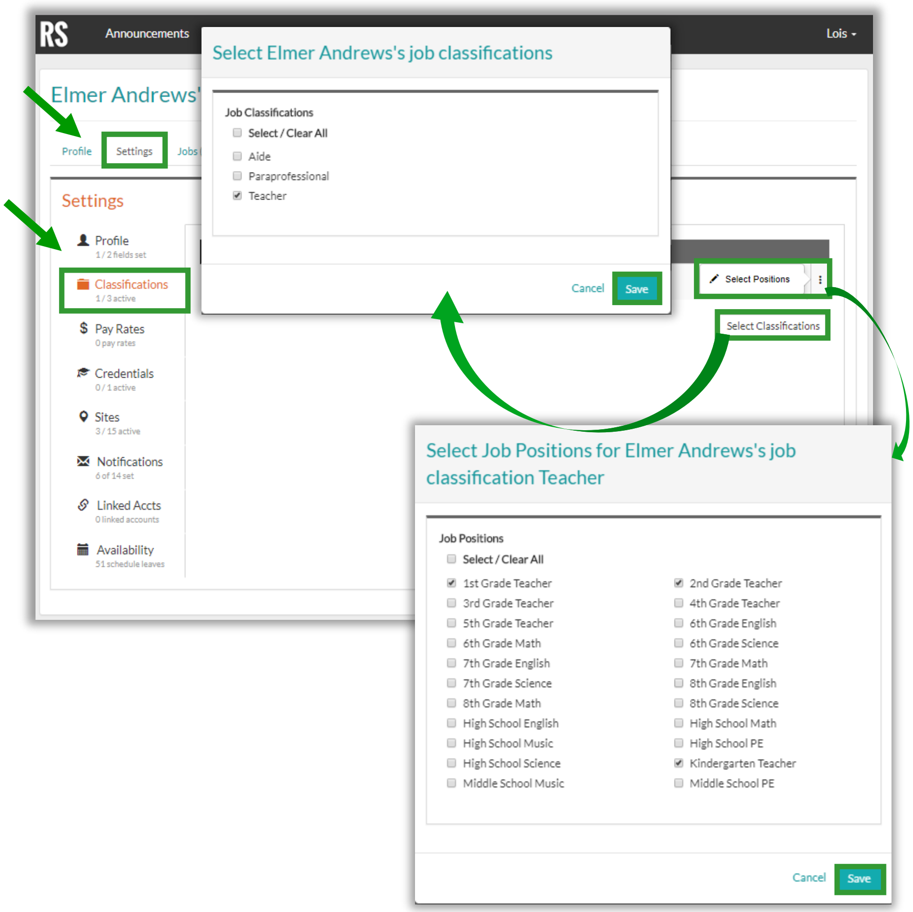
Edit your Substitute Profile

As a ReadySub administrator, you can view and edit your substitute profile information including their first name, last name, email address, phone number and address.

To edit their name, email or phone number click the Edit Profile button. To edit their address, click the Edit Address button.



Edit your Substitute Job Classifications & Positions



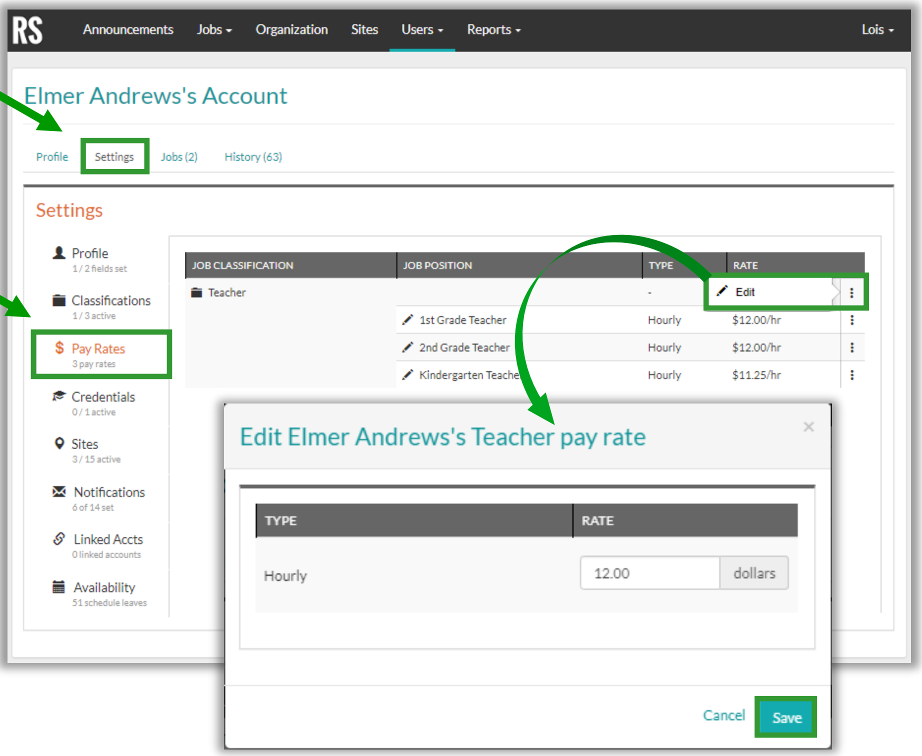
As a ReadySub administrator, you can view and edit your substitute job classifications and positions.

To view a substitute's job classifications and positions, navigate to their Profile and Settings tab followed by the Classifications tab.

To edit a substitute's job classifications, click the Select Classifications button. To edit a substitute's job positions, click the Select Positions button next to the corresponding Job Classification and check/uncheck the necessary boxes.

If a substitute is turned off for a Job Classification or Job Position, they will not be able to view or accept these jobs.

Edit your Substitute Pay Rates



As a ReadySub administrator, you can view/edit substitute pay rates on a per-substitute basis.

The pay rates can be set at the job classification level and the job position level.

To view/edit your substitute pay rates, navigate to their profile and click the Settings tab followed by the Pay Rates tab.

Next to each job classification and job position you will find three dots. Click these dots followed by the Edit button to edit your substitute's pay rates.

Please note, the Pay Rates setting must be enabled within your organization to view/edit substitute pay rates. If it is not enabled, contact support@readysub.com to enable it.

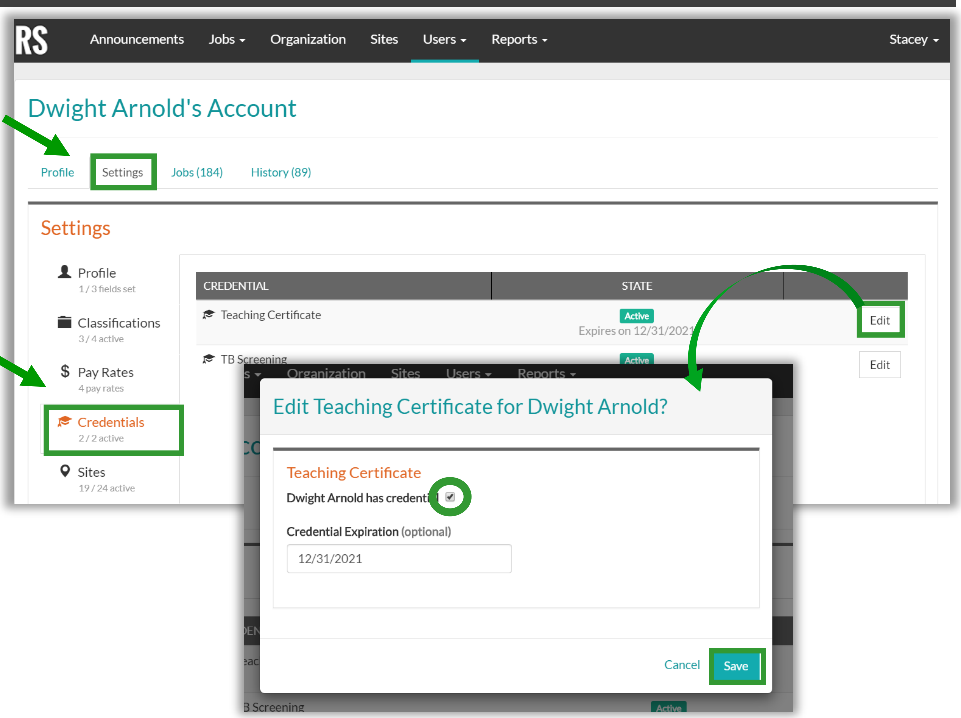
Edit your Substitute Credentials

As a ReadySub administrator, you can view/edit substitute credentials that have been setup at the organization level.

To learn more about the credentials feature, see the "Substitute Credentials" section of this user guide.

To view/edit your substitute credentials, navigate to their profile and click the Settings tab followed by the Credentials tab.

Click Edit next to any existing credentials to add/update the settings and expiration date (if applicable).



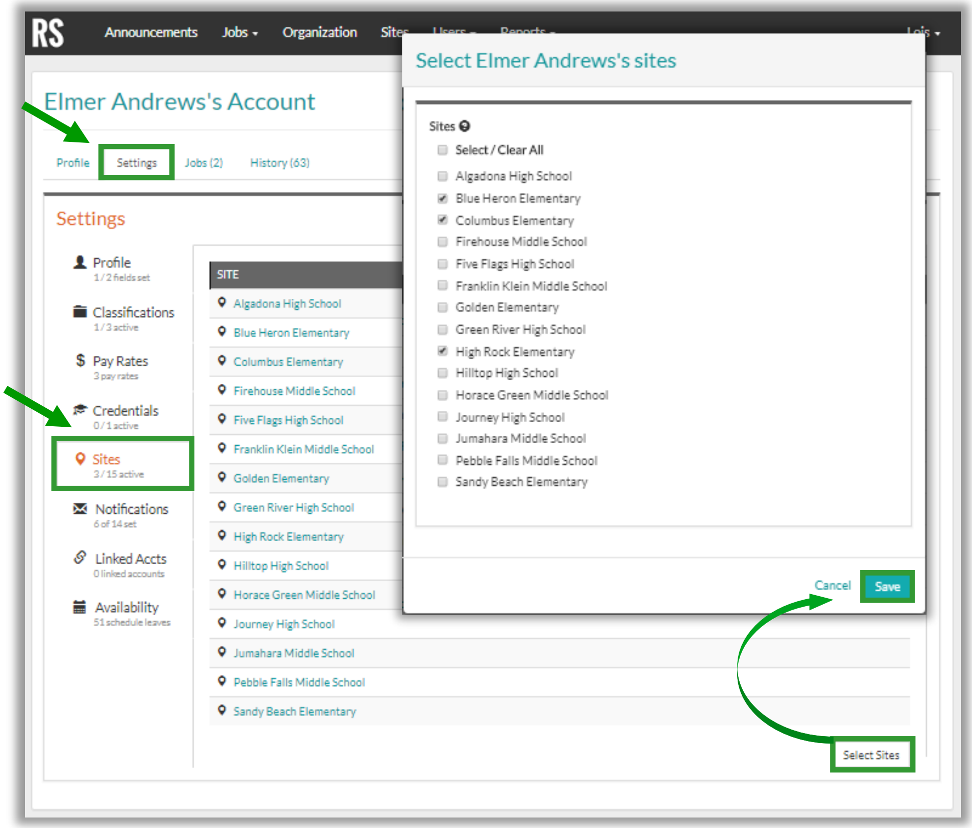
Edit your Substitute Sites

As a ReadySub administrator, you can view and edit the sites your substitutes can work at.

To edit a substitute's sites, navigate their profile followed by the Settings tab, then the Sites tab.

Click the Select Sites button and a list of the sites in your organization will populate.

Check the relevant sites and click Save to update the sites your substitute can accept jobs at and receive job notifications for.



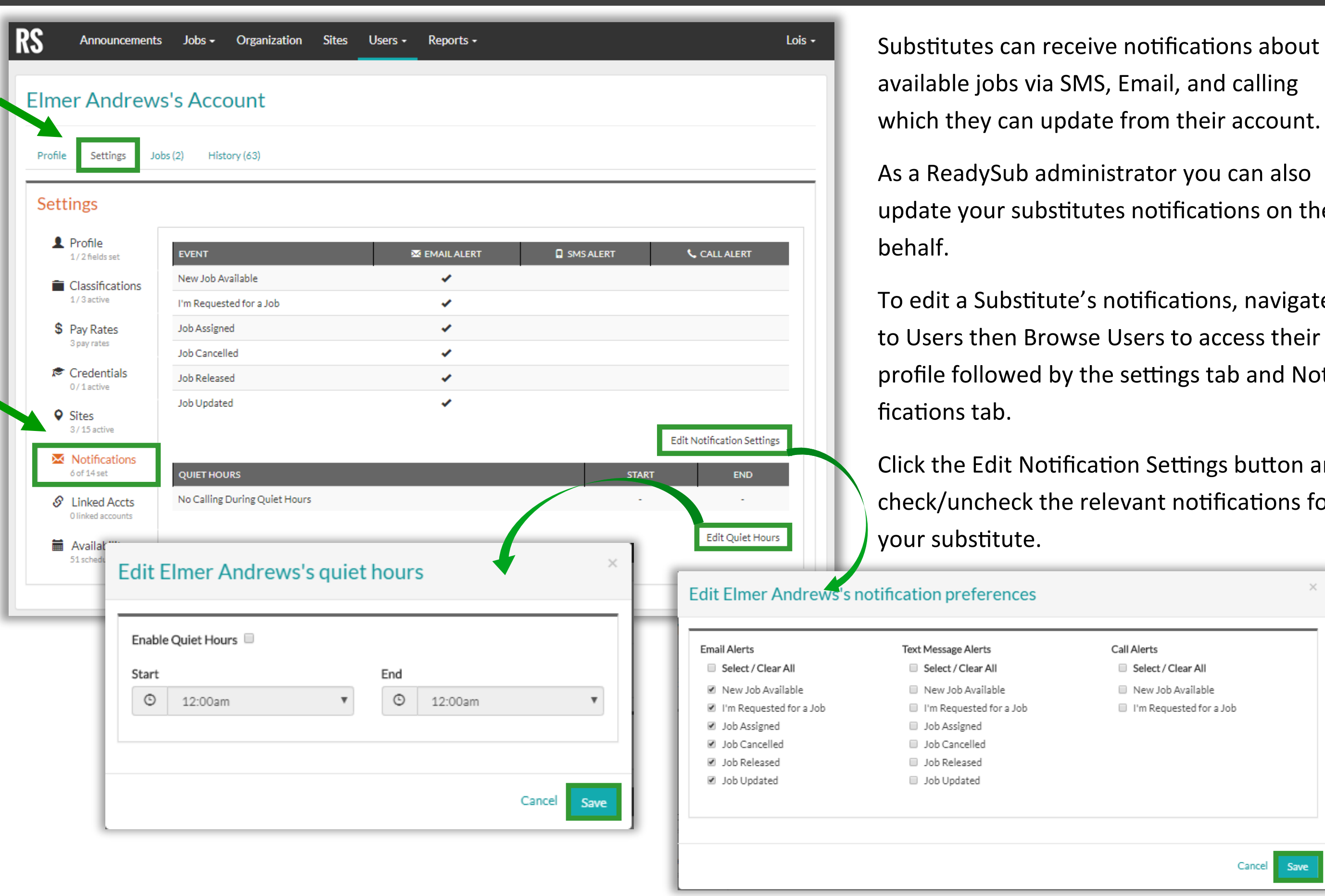
Edit your Substitute Notifications

Substitutes can receive notifications about available jobs via SMS, Email, and calling which they can update from their account.

As a ReadySub administrator you can also update your substitutes notifications on their behalf.

To edit a Substitute's notifications, navigate to Users then Browse Users to access their profile followed by the settings tab and Notifications tab.

Click the Edit Notification Settings button and check/uncheck the relevant notifications for your substitute.



Edit your Substitute Availability

Substitutes can limit their availability in ReadySub to only be notified on certain dates or days of week, and as a ReadySub administrator you can update these settings on behalf of your substitutes.

There are two types of unavailability in ReadySub: Scheduled Leave and Daily Availability. Daily availability is a recurring schedule where scheduled leave is a one –time entry.

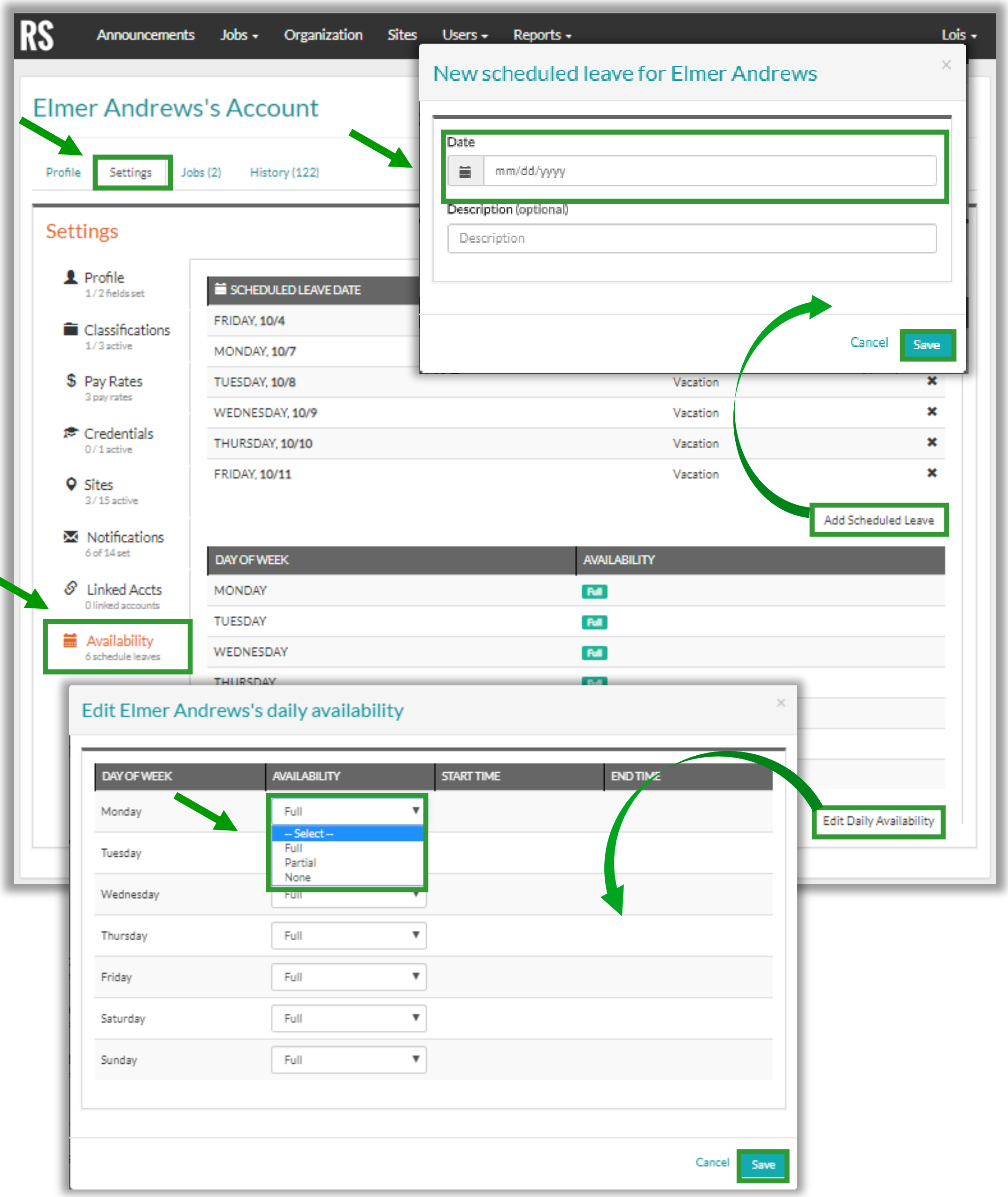
To edit a substitute's availability , locate their profile from the Browse Users page and access the Settings tab followed by the Availability tab.

To edit a substitute's Scheduled Leave click the Add Scheduled Leave button and enter the dates they are unable to work.

To edit a substitute's daily availability click the Edit Daily Availability button.

Substitutes can have full, partial, or no availability on a recurring basis. When setting partial availability, you'll need to specify the time range the substitute can work.

Click Save to finalize the updates.



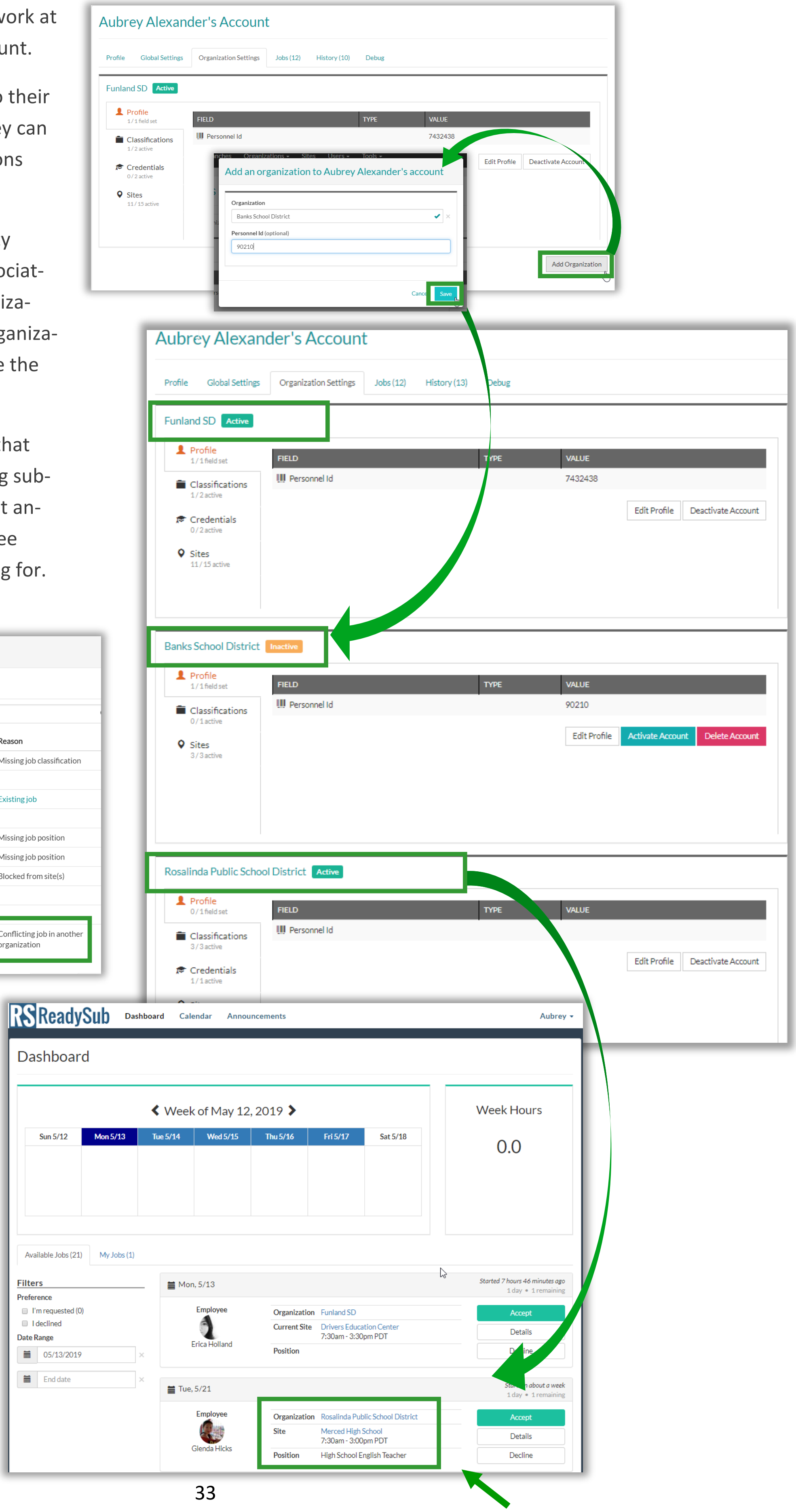
Multi-Organization Substitutes

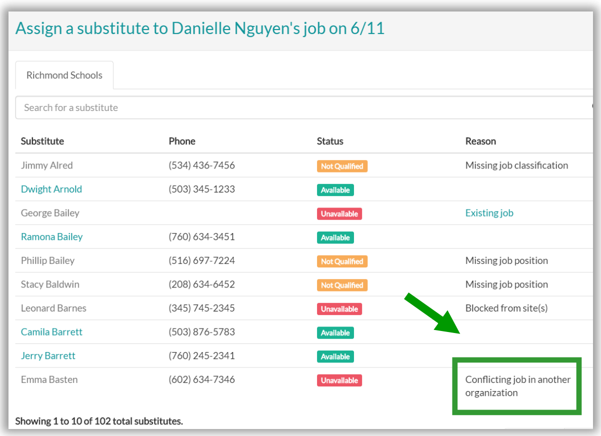
ReadySub allows individual substitutes to work at multiple organizations from the same account.

ReadySub can help link these substitutes to their respective organizations at which point they can see jobs for all of their assigned organizations from the same login.

ReadySub also tracks all jobs and availability across the organizations a substitute is associated with so if a substitute has a job at organization A that overlaps with an open job at organization B, the substitute will not be able to see the job at organization B and vice-versa.

Organization and site admins can also see that the substitute is unavailable when assigning substitutes manually, due to a conflicting job at another organization, however they cannot see which organization the substitute is working for.





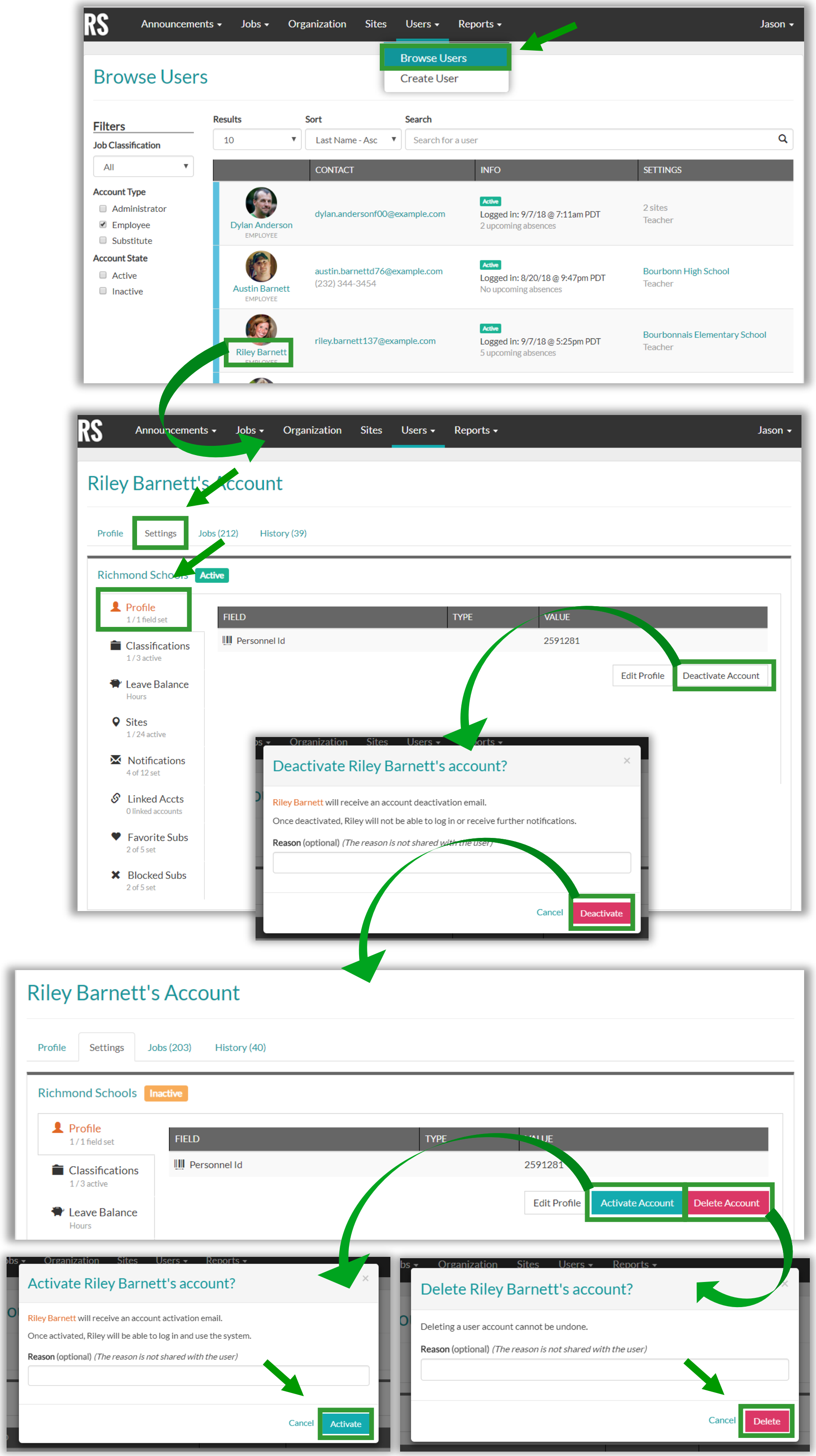
Activate, Deactivate, and Delete Accounts

As an administrator you can activate, deactivate and delete users from the Browse Users page under the main Users drop down.

You will see a list of all employees, substitutes and administrators within your organization. To view one of your users, click their name and navigate to the Settings tab followed by the Profile tab.

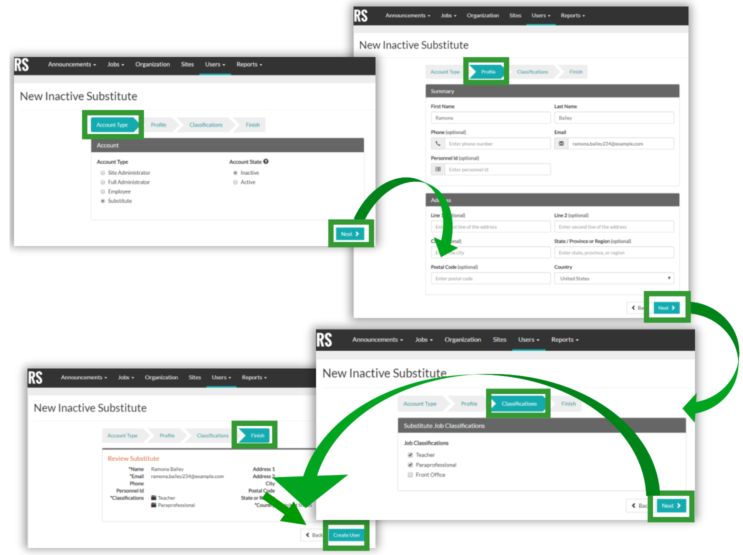
If a user is in an active state, you can deactivate them. If the user is in an inactive state you can activate or delete them. Deactivating an employee, substitute, or administrator from the system will remove them from the view of all other ReadySub users and prevent them from logging in entirely. Activating them will allow them to log back in to ReadySub.

Deleting a user from ReadySub will remove them from all views and is an irreversible action. The user will also lose the ability to log in or receive notifications. This will also free up their email address to be used for creating other account types.



Create a Substitute Account

To create an individual substitute account, select Create User under the main Users drop down.



From the Account Type tab, select the Substitute option followed by Active if you'd like them to receive the welcome email, or Inactive if you'd like to activate them at a later time.

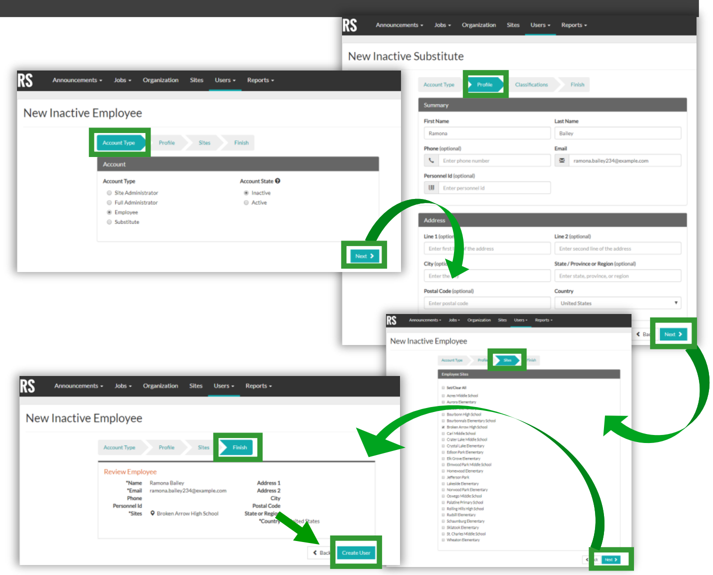
From the Profile tab, enter the substitute's first name, last name, phone number, country code, and email address (mailing address and personnel ID are optional).

From the Classifications tab, select one or more job classifications which will determine the jobs they are able to view and accept.

The Finish step summarizes the user and allows you to finalize creation of the account.

Create an Employee Account

To create an individual employee account, select Create User under the main Users drop down.



From the Account Type tab, select the Employee option followed by Active if you'd like them to receive the welcome email, or Inactive if you'd like to activate them at a later time.

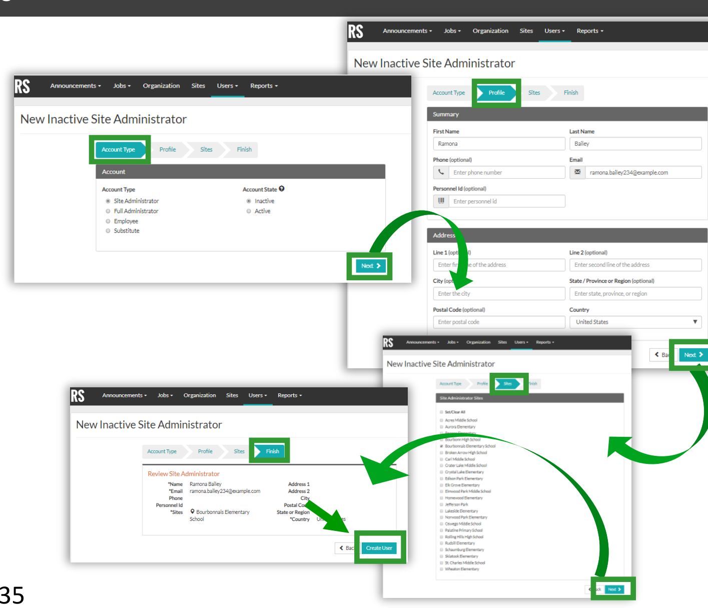
From the Profile tab, enter the employee's first name, last name, phone number, country code, and email address (mailing address and personnel ID are optional).

From the Sites tab, select one or more sites which will determine the location of their absences.

The Finish step summarizes the user and allows you to finalize creation of the account.

Create an Administrator Account

To create an individual administrator account, select Create User under main Users drop down.



From the Account Type tab, select the Full or Site Administrator option followed by Active if you'd like them to receive the welcome email, or Inactive if you'd like to activate them at a later time.

From the Profile tab, enter the administrator's first name, last name, phone number, country code, and email address .

From the Sites tab (site Admins only), select one or more sites which will determine the jobs they can view, edit and approve. Full administrators are turned on for all sites.

Linking Multiple Accounts

ReadySub allows multiple accounts to be attached to the same email address and for administrators to do the linking. The most common uses are employees that also substitute and administrators that need to enter their own absences in ReadySub.

To link multiple accounts you must follow several steps in order. Using the employee and substitute accounts as an example and assuming the employee is the primary account, here are the steps for creating and linking accounts.

Step 1 - Create the Primary (employee) account. **When creating the primary, be sure to enter the user's valid email** address.

Step 2 - Create the Secondary (substitute) account. **When creating the secondary account, enter the email suffix "@example.com" which ReadySub knows is a placeholder account. It helps to add numbers prior to the prefix (see example) to ensure the address is unique.** Once linked to the primary account, the valid email address will supersede the @example.com address and apply to both accounts.

Step 3 - Once the primary and secondary accounts have been created and activated **(make sure to activate both accounts prior to linking)** navigate to he Browse Users page and locate the primary account.

Step 4 - Click the primary account's name to access their account profile.

Step 5 - Go to the Settings tab of the primary account followed by the Linked Accts tab.

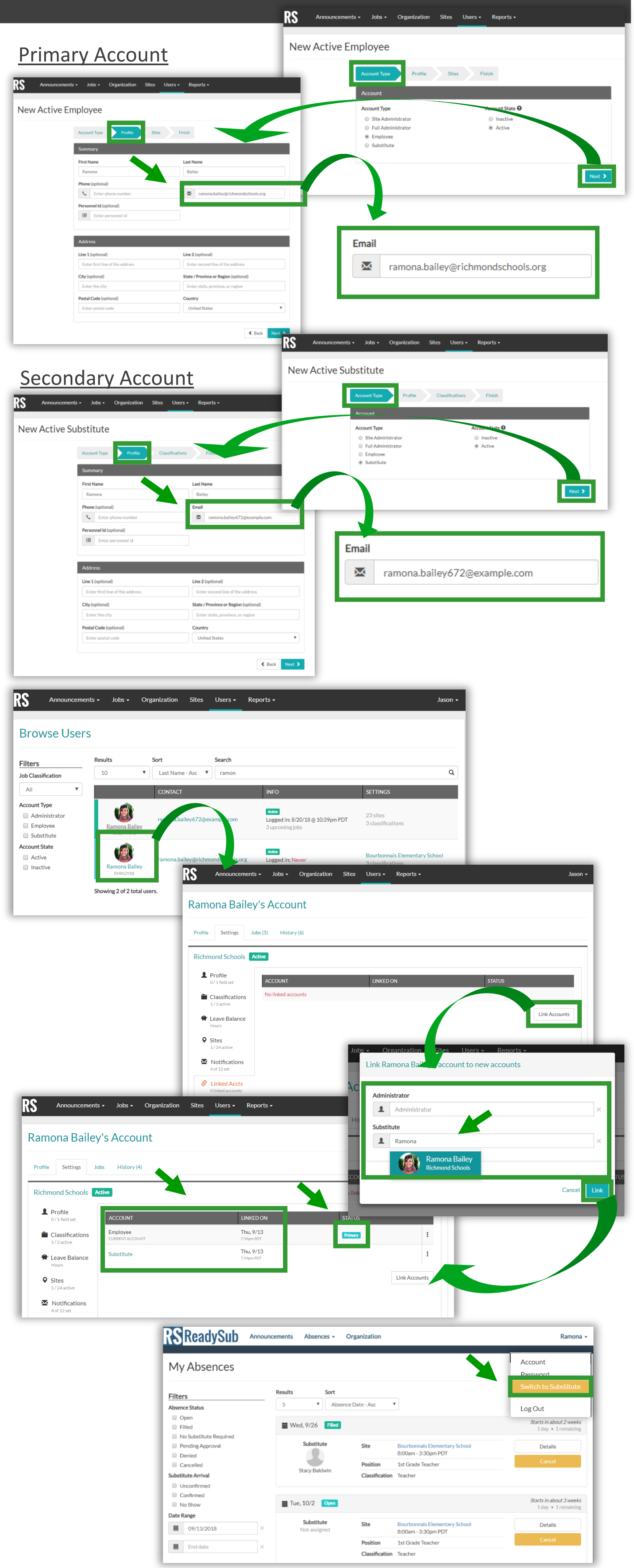
Step 6 - Click the Link Accounts button.

Step 7 - Search for the secondary account in the relevant user field.

Step 8 - Click the search result followed by the Link button to complete the process.

Once the linking is complete, you will see the accounts listed as Linked from the primary account's profile and Browse Users page. The user will now be able to switch between both accounts from the same login by hovering over their name and clicking the "Switch To" option.

The user's primary email address will also be attached both accounts and be able to receive notifications. The user can update each account's notification preferences from its respective Notification Preferences tab.

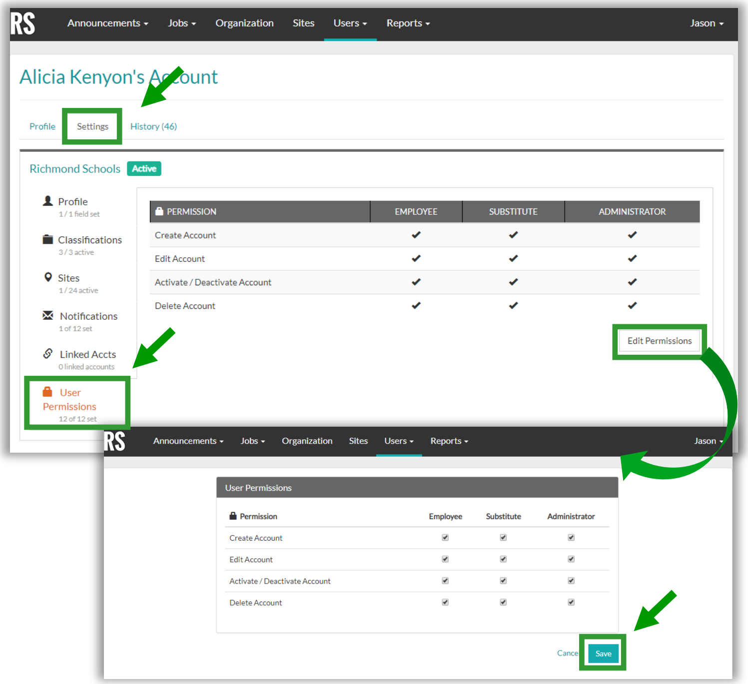


Administrator Permissions

ReadySub supports permissions that limit administrator abilities to be create, edit, activate, deactivate and delete users.

To edit an administrator's user permissions, access their profile via the Browse Users page followed by the Settings tab then the User Permissions tab towards the bottom of the screen.

Click the Edit Permissions button and uncheck the fields that you'd like to limit for the administrator. When user permissions are turned off, the administrator can still view these users but in a "read-only" capacity.



Administrator Sites & Classifications

Administrators can be filtered down by site and classification in order to view (and be notified of) a specific subset of absences.

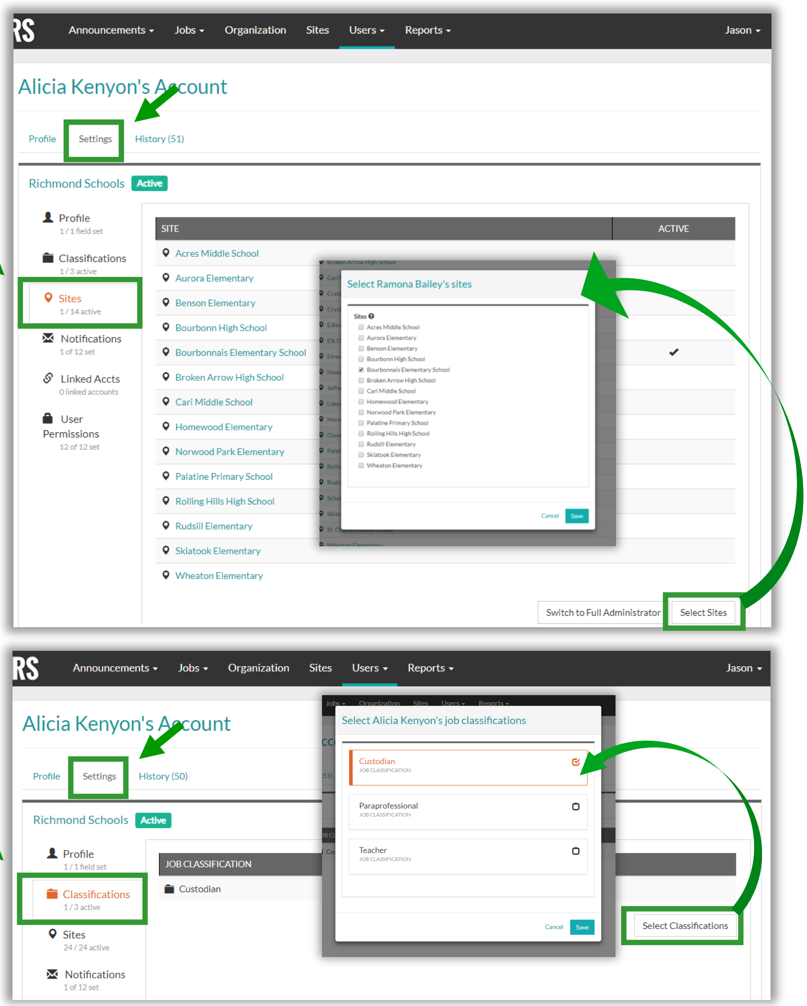
School principals and secretaries that are to see absences only for their school can be filtered by site where the head custodian can be filtered by classification.

To edit an administrators site and classification settings, access their profile from the Browse Users page followed by the Sites and/or Classification tabs.

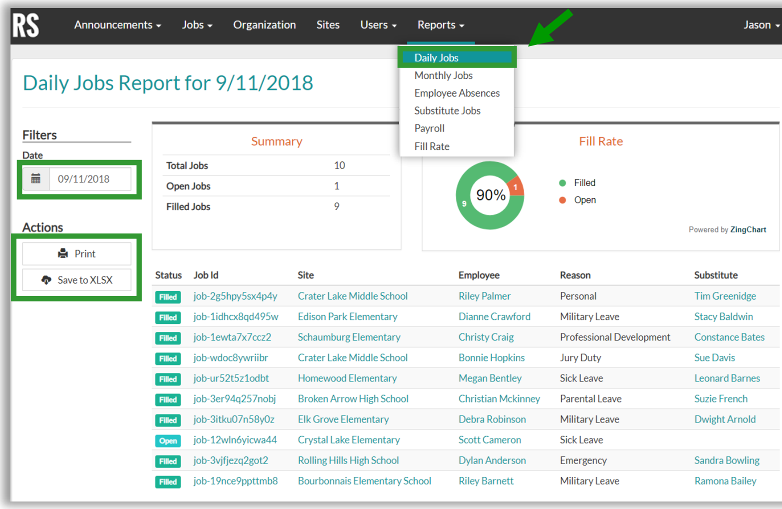
To edit an administrator's sites, click the Select Sites button and add a check mark next to their corresponding site(s).

To edit an administrator's classifications click the Select Classifications button and add a check mark next to their corresponding classifications.

When an administrator is created they default to see all classification so filtering must be done after the account is created. Site level filtering on the other hand can be completed during the setup process by selecting the role of Site Administrator and choose the site(s). Full administrators can see all sites and all classifications by default.



Daily Jobs Report



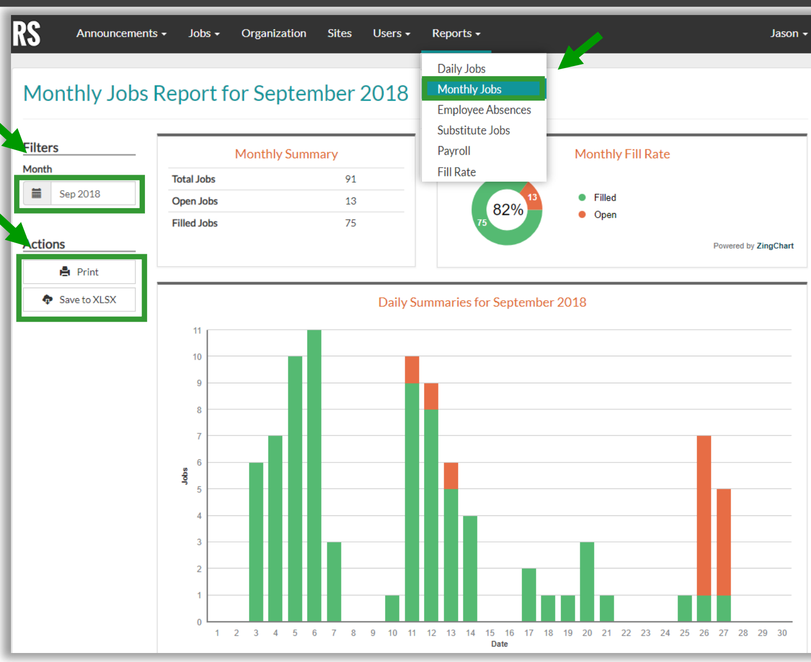
The Daily Jobs Report highlights the job activity for any day of the week.

You can see the number of Filled, Open, and Total Jobs in three different formats including a pie chart.

To change the date, select the Date filter and adjust.

To Print and/or Export the Daily Jobs Report to Excel, click Print or Save to XLSX.

Monthly Jobs Report



The Monthly Jobs Report shows Open, Filled, and Total jobs for the selected month.

Jobs are highlighted in pie and bar chart formats. Within the bar chart, orange and green bars indicate the number of open and filled jobs for each day of the month.

To change the month, select the Month filter and adjust.

To Print and/or Export the Monthly Jobs Report to Excel simply click Print or Save to XLSX.

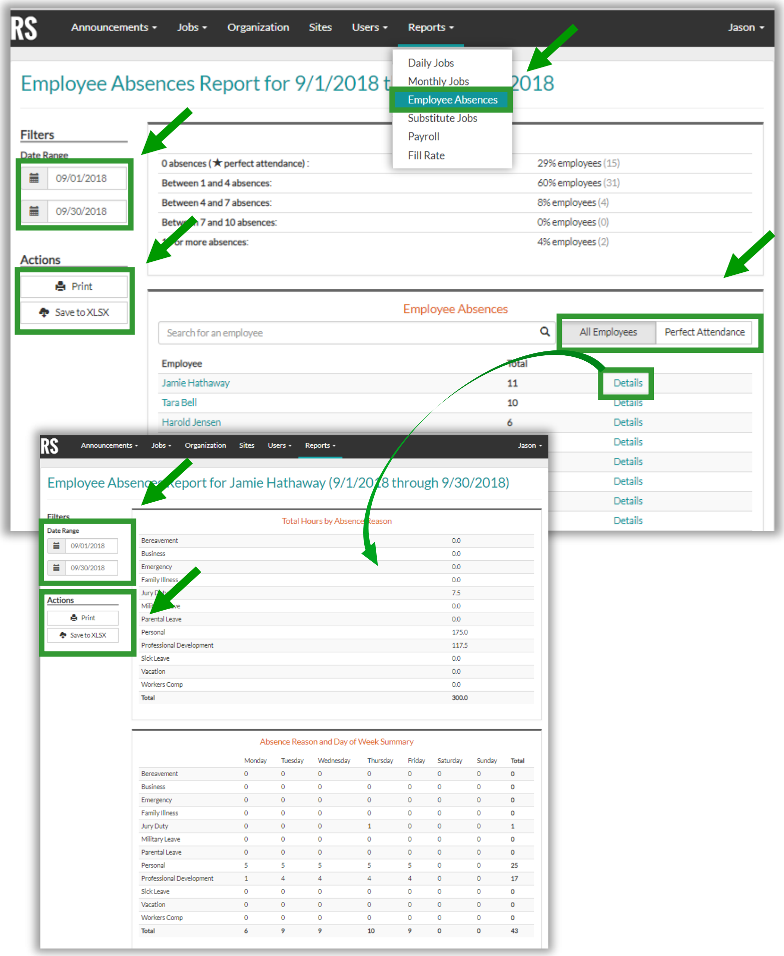
Employee Absence Report

The Employee Absence Report provides a unique perspective on your employee absences. The Summary section groups absences starting with perfect attendance. Within each group you can see the total number of employees and percentage of absences that falls within it.

Below the Summary is a list of your employees from most absent to least absent including employees with perfect attendance. To adjust the view dates, simply navigate to the date range calendar to the left portion of the screen and adjust.

To access an employee's individual absence page, click the Details link next to their name. In addition to a list of their absences you can see the number of hours tied to each absence reason and the days of the week they tend to be the most/least absent.

To access an employee's profile information or the details of any absence click the corresponding link. Both the aggregate and individual employee absence reports can be printed and/or exported into Excel.



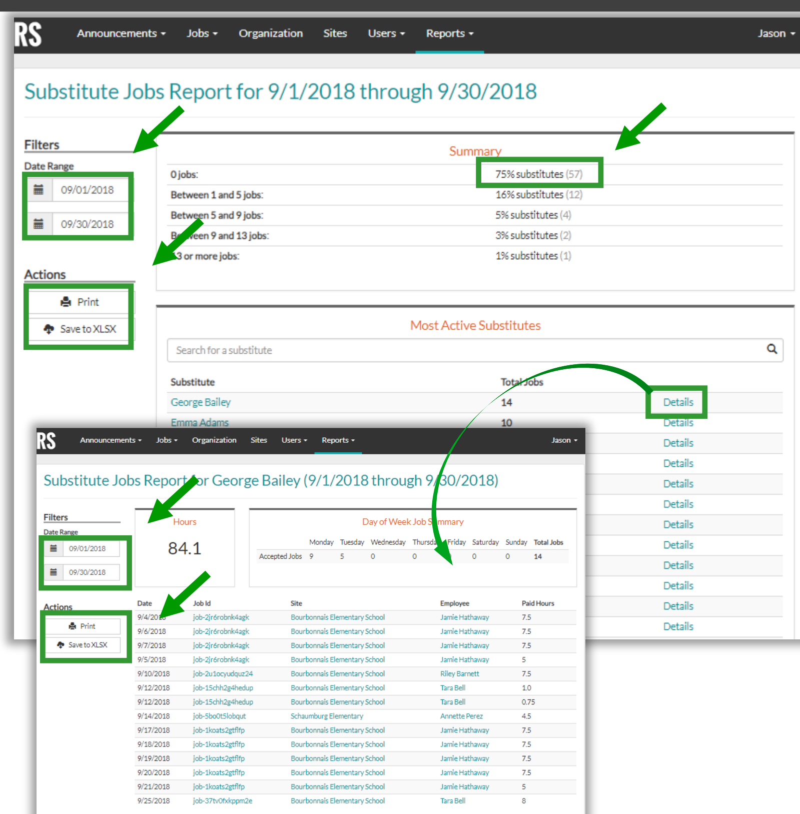
Substitute Jobs Report

The Substitute Jobs Report provides insight on your substitute activity. The Summary section groups activity and within each group you can see the number of substitutes and percentage of jobs that falls within it.

Below the summary is a list of all of your substitutes in order of most active to least active. To adjust the view dates, simply navigate to the date range calendar to the left portion of the screen and adjust.

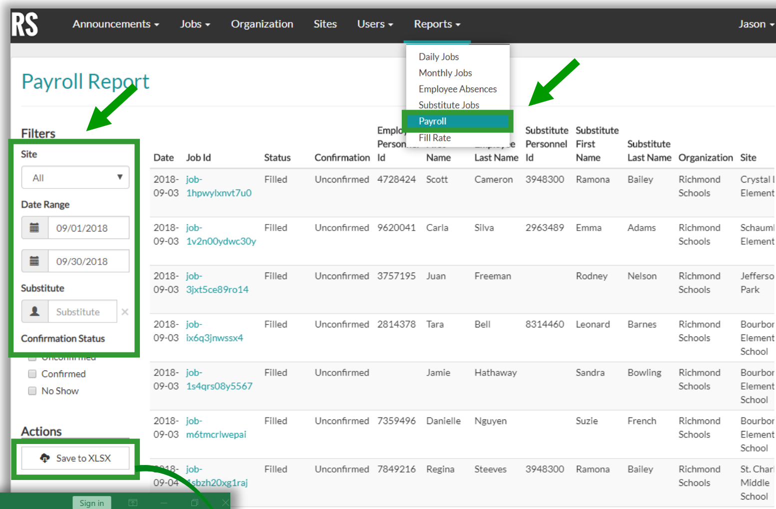
To access a substitute's individual job page, click the Details link next to their name. In addition to a list of their jobs you can see the number of hours and the days of the week they've worked within the specified date range.

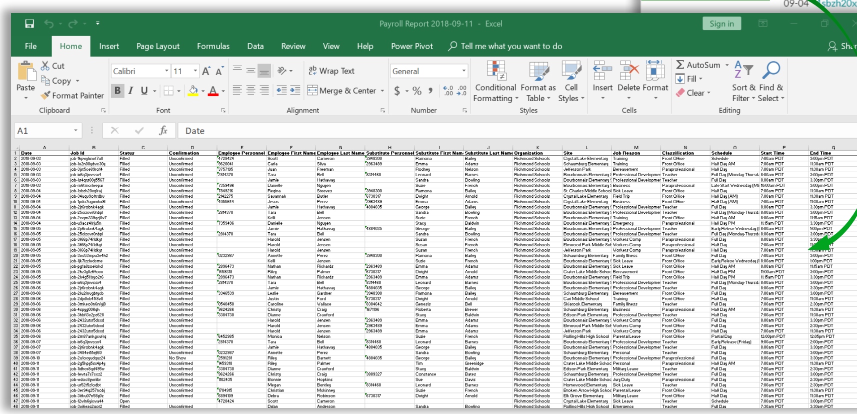
To access a substitute's profile or the details of any job, click the corresponding link. Both the aggregate and individual substitute reports can be printed and/or exported into Excel.



Payroll Report

The payroll report provides a detailed account of all jobs and absences and can be used reconciliations. Included in this report is the Job ID, Confirmation Status, Absent Employee's name, Substitute's name, Job Reason, Classification, Schedule, Hours worked and when the job was created and filled. You can also drill down on a specific substitute or time period via the Substitute and Date filters on the left side of the screen. Exporting the payroll report into Excel can be accomplished via the Save to XLSX button. To create a more customized version of this report, see the Custom Reports section of this user guide.

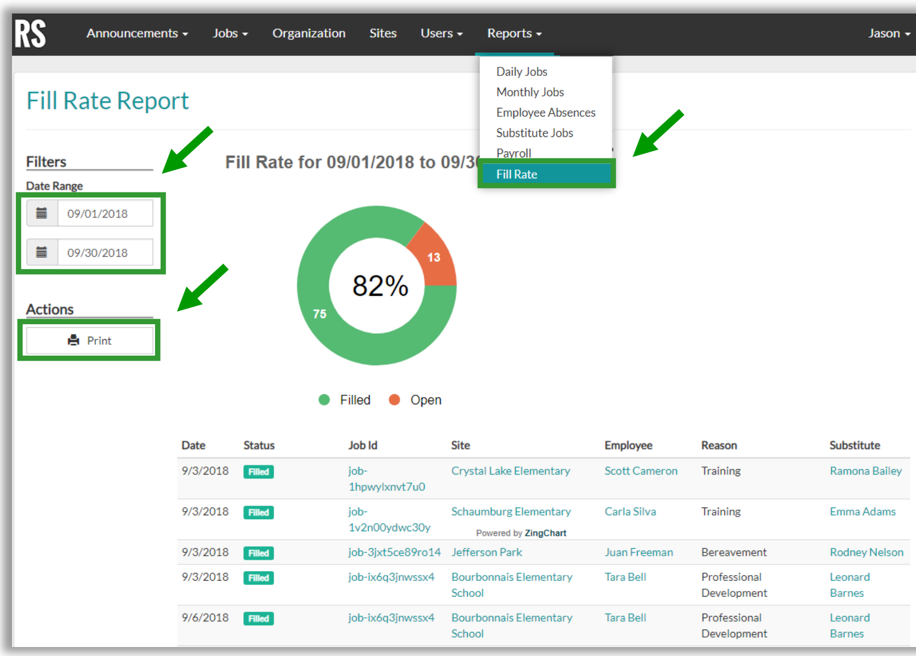




Fill Rate Report

The Fill Rate Report is similar to the Daily and Monthly Jobs Report but allows you to adjust the time period beyond a specific month or date.

To update the date range, click the start and end date filters. You can also print or export this report via the Print and Save to XLSX buttons.



Create a Custom Report

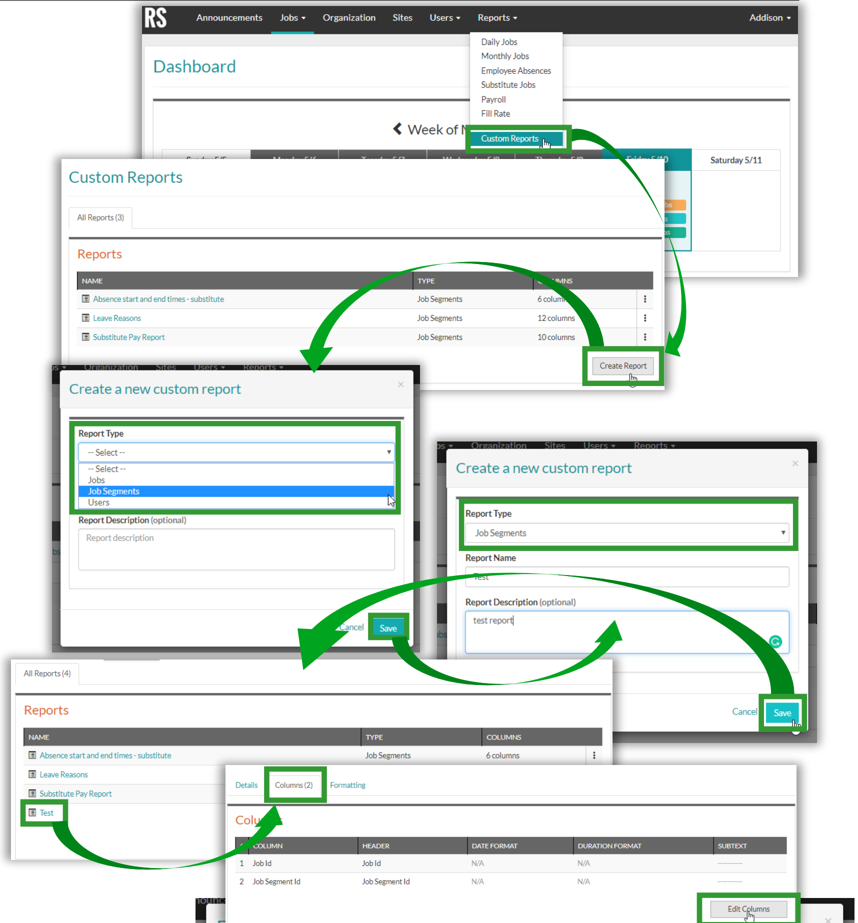
ReadySub Custom Reports can be used to support important payroll processes, export absence and job information for integrations, and review user related information.

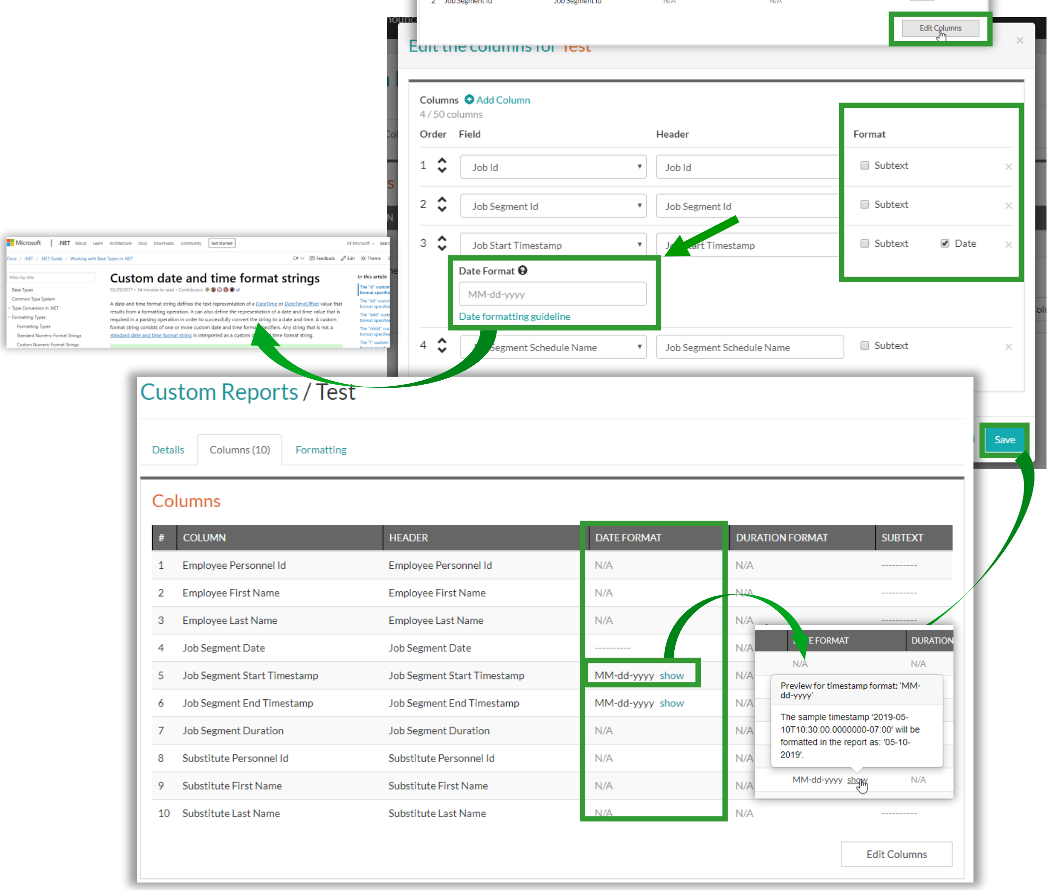
To create a custom report, navigate to the Reports drop down followed by the Custom Reports option. Select the Report Type and enter the name of the report. In this case we've selected a Job Segments Report which is the most useful for payroll.

Once the report is created, navigate to the Columns tab of the report and click the Edit Columns button. See the Custom Reports [Glossary of Terms]() for information about various field options.

For date and time fields, you can make adjustments to the format by clicking the "Date formatting guide" link next to the field in question and updating the format to match the description.

Once the report is saved, you can verify the formatting via the "show" link and make sure your information will report the way you expect it to.





Run a Custom Report

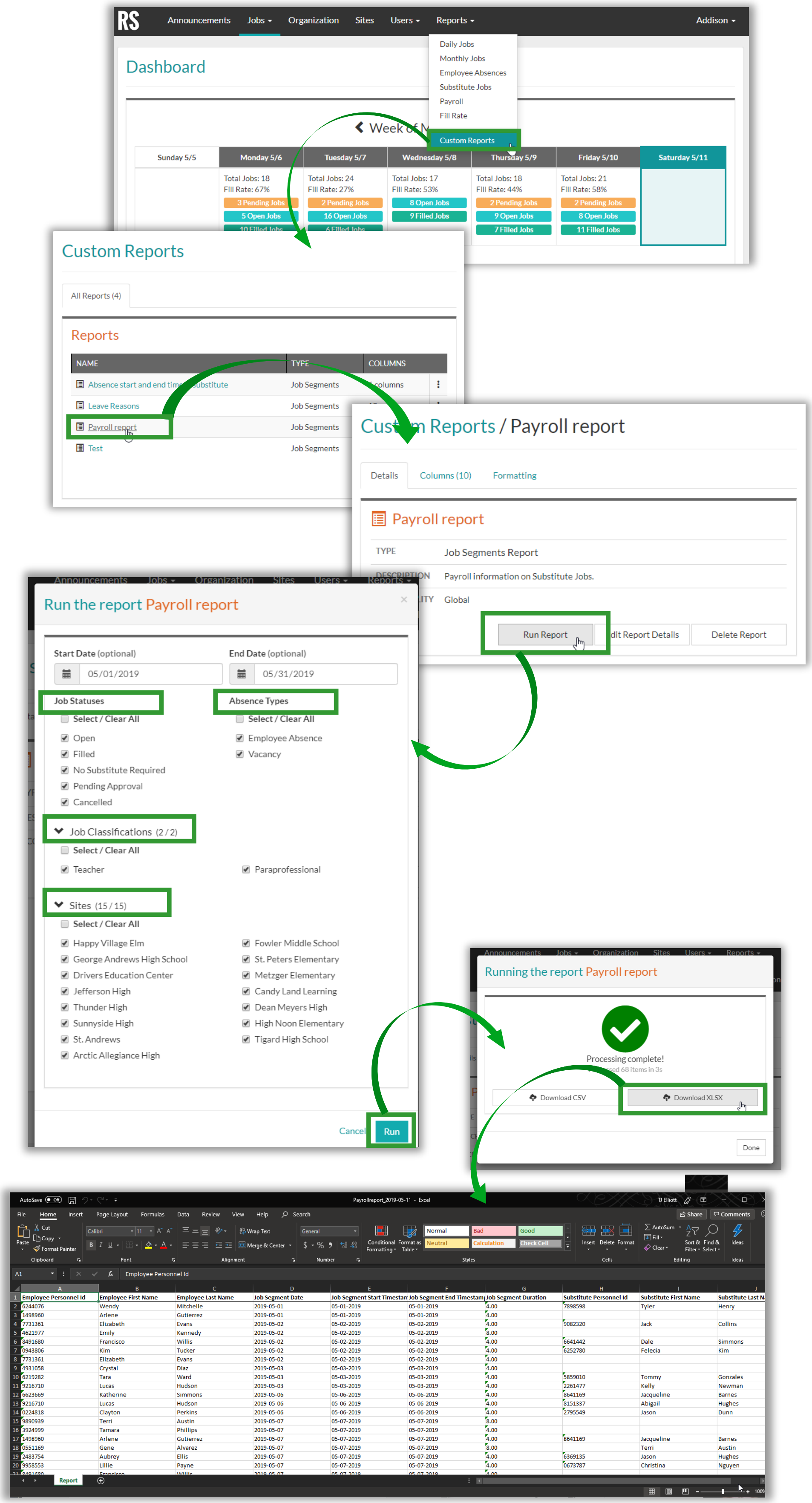
To run a custom report, navigate to Reports drop down followed by the Custom Reports option. Click the name of the report to access the report details then click the “Run Report” button.

You can also run custom reports from the main custom reports page by clicking the three dots next to any report followed by the Run option.

When running a report, you are able to filter the results by date range, job status, absence type, job classification, and site.

Once your run settings have been established, click Run to run the report and a window will pop up with the run status.

Once the processing is complete you can export to CSV (comma delimited) or Excel.

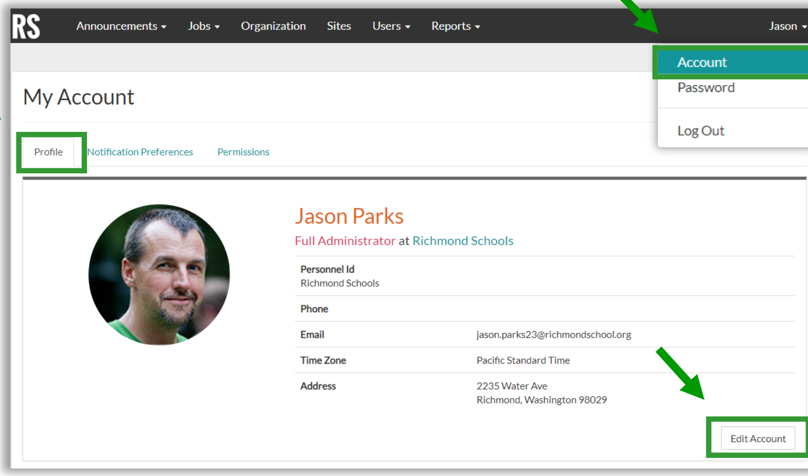


Edit your Profile

To access your account information, hover over your name and select the Account tab towards the top right corner of the screen.

Towards the middle of the page you'll see three tabs labeled Profile, Notification Preferences and Permissions.

To edit your Profile information, click the Edit Account button towards the bottom right portion of the screen.

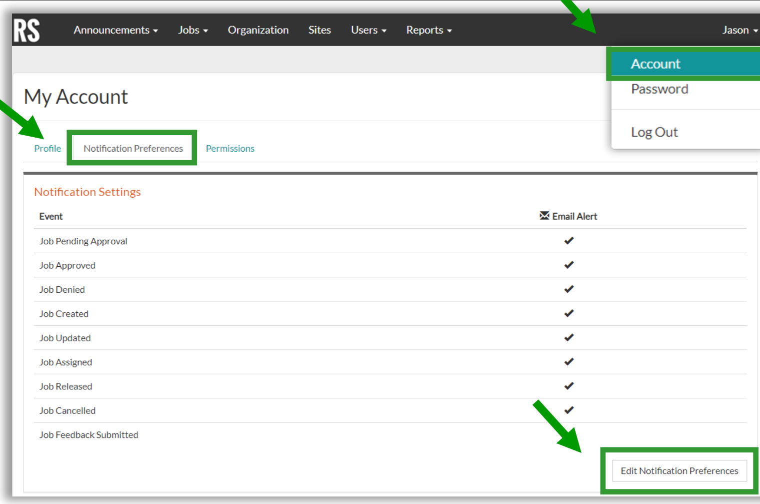


Update your Notification Preferences

As an administrator you can update your notification preferences by hovering over your name and selecting Account followed by the Notification Preferences tab.

You can be notified via email when an absence is created, edited, or cancelled by an employee as well as when a substitute accepts or releases a job and if they've provided feedback on their work experience.

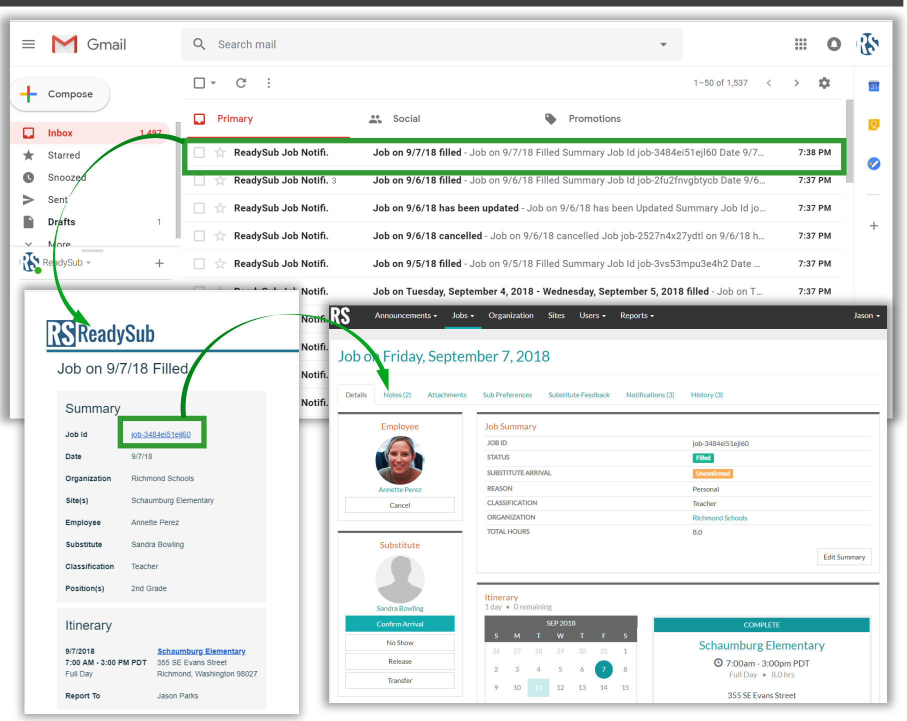
Depending on your network setup, certain job reasons may require administrator approval. In these cases you can be notified via email when an absence requiring approval is submitted so you can log in and approve or decline it.



Email Notifications

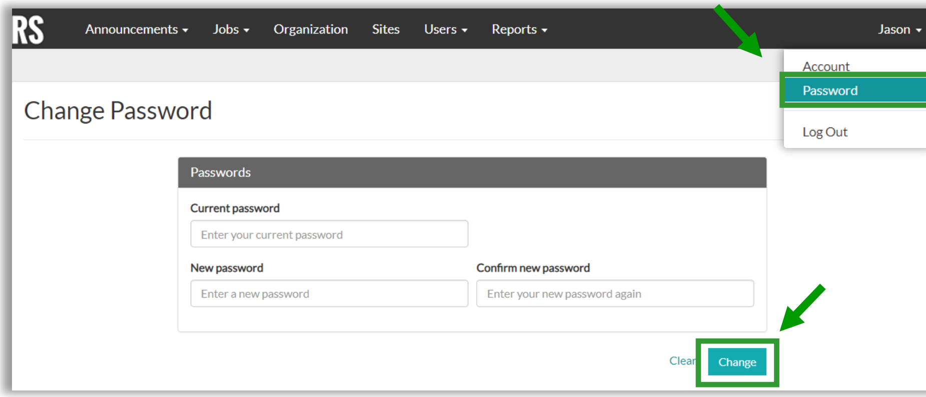
ReadySub notifies administrators via email when absences are created, edited, cancelled, accepted by a substitute, assigned to a substitute by an employee, approved or denied by a fellow administrator and if a substitute has left any feedback on their work experience.

To access an absence from an email notification, open the email and click the Job ID link. If you're logged into ReadySub, you will be taken directly to the Job Details page. If you're not logged in, you will be sent to the ReadySub login page after which you will be redirected to the Job Details page to view or edit the absence.



Change your Password

To change your password, hover over your name and select Password. Enter your current password followed by your new password. Select Change to finalize the newly created password.

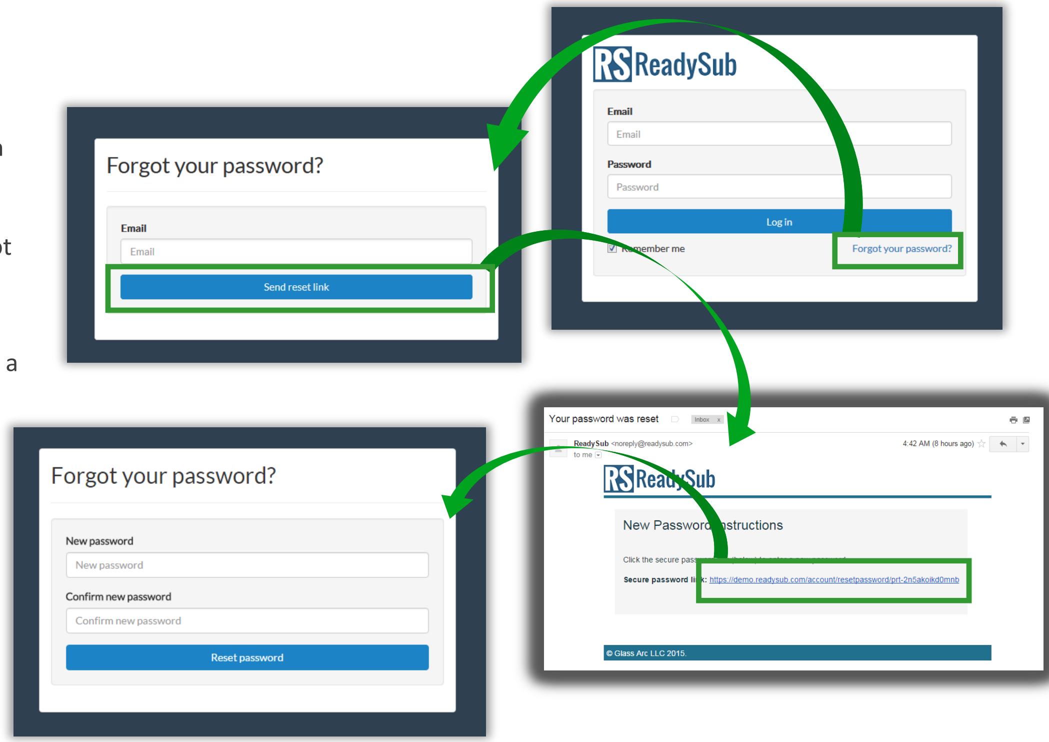


Forgot your Password

In the event that you forget your password and need to generate a new one, go to the log in page at www.readysub.com/account/login and select Forgot your password?

You will be redirected to the Forgot Password page where you can enter your email address. Click Send Reset Link and you will be emailed a link to create a new password.

The link is valid for 24 hours and connects you directly to the page where you can enter and confirm your new password.



Log Out

To log out of ReadySub, hover over your name and select Log Out. You will be taken directly out of the system and back to the log in screen.