

Welcome to EasyConnect’s automated dispatch system. EasyConnect can be used to create absences, contact Replacements, and fill openings. The following manual will answer questions you may have.

Log Into Your Account on ApplyToEducation

1. Visit ApplyToEducation.com and enter your username and password.
2. Click ‘Forgot Your Login’ if you need to generate a password reset email.

Please Note: If your Employer uses Single Sign On you can click the ‘Login using Office 365 button’ and enter your School Board email address to login.

Reviewing Absences

Use your Homepage to monitor your absences. Simply click on a # to view the absences.

Absences On Hold: These absences have been placed “on-hold” and are waiting to be reviewed

Absences missing Replacement strategy: No Fill Method selected (e.g. EasyConnect, Manual Fill, etc.)

Replacements not contacted: EasyConnect was selected but has not started contacting Replacements

Replacements being contacted: EasyConnect is contacting Replacements but the assignment is unfilled

Unfilled – done contacting Replacements: EasyConnect has completed its contact strategy

Absent times with no Replacement: No Replacement time entered for a portion of the absence

Replacements not required: The absence is set to “no Replacement required”

Replacements times filled: Replacements have filled all times where a Replacement was required.

On Job Board: Unfilled absences are visible to all employees in the employee group

Absences	Today	After Today
Absences On Hold	5	1
Absences missing replacement strategy	1	15
Replacements not contacted	0	2
Replacements being contacted	0	0
Unfilled - done contacting replacements	10	6
Absent times with no replacement	1	20
Replacements not required	12	270
Replacement times filled	8	193
On Job Board	0	1

Speed Tip: You can click Cancel in the lower right corner of your screen to stop loading the EasyConnect dashboard on the right side of the dashboard if you don’t require the data.

Reviewing Absences Missing Information

EasyConnect only displays absences in this section which require you to enter data so they can be processed. Click on a # and then click on absences to enter the missing information.

Absences Missing Information	Absences
No Absent Percentage	...
No Charge Back Codes	
Invalid ASN	

Creating an Absence

1. Under the **EasyConnect** section click **Create Absence**, select Employee Group (e.g. Elementary Teacher, ECE, etc.) and if the absence requires a Replacement (Y/N).
2. Enter the **Date** and **Time** of the absence. If the absence spans multiple days select **Add Days**, pick your end date and the days of the week the employee will be away.
3. From the drop-down list select the **Absent** employee name, **Assignment**, **Reason** for the absence and the **Absence** percentage if it's not Auto populated (e.g. 100%: full day, 50%: half day). You can also enter **Additional Info** and a **Release Code** that will be for your records and not visible to the Replacement.

If your school board allows it, you can leave the assignment field in your absence blank for non-replaceable employees. You will not be required to select an assignment before saving your absence.

The screenshot shows the 'Create Absence' form. The 'Date' field is highlighted with a green circle. The 'Time' field is set to 08:30 AM to 03:30 PM. The 'Absent' field is set to 'Dave Benk'. The 'Assignment' field is set to 'Primary'. The 'Reason' field is set to 'SICKEMP - Sick Employee'. The 'Additional Info' and 'Release Code' fields are empty. The 'ADD REPLACEMENT' button is circled in red.

4. Click **ADD REPLACEMENT**. The **Date** and **Time** will default to match the absence.
5. Select the **Fill Method**, and **Pay rate if it's not Auto populated** (percentage or hours). If your School Board uses Charge Back codes, enter it by number, name, or type "???" to list all options. Add additional codes by selecting **Add Charge Back**.
6. When you have entered all the Replacement details click **OK**.

The screenshot shows the 'Add Replacement' form. The 'Date' field is set to 2018-02-27. The 'Time' field is set to 08:30 AM to 03:30 PM. The 'Fill Method' field is set to 'EasyConnect'. The 'Replacement' field is set to '122ST100000 - CCC - Daycare Infants and Toddlers'. The 'Payroll' field is empty. The 'ADD REPLACEMENT' button is circled in red.

7. Finish by clicking **SAVE**. If the employee group is configured to automatically select all Replacements you are done.

If you need to manually select Replacements, you will be directed to the **Add Contacts** page. Make your selection and click the **ADD** button to complete this absence.

Multiple Employees, Dates, Times, and Subjects

1. Follow steps 1-7 from 'Creating an Absence.'
2. Additional **Absent Employees** or **Replacement Employees** can be added to your absence by clicking **ADD ABSENT EMPLOYEE**.
3. Verify that you filled all your Replacement times and then click **SAVE** to process the absence.

Filling Absences

When entering an absence, you have multiple Replacement options for filling it. Pick the time frame and then select your fill method.

- **EasyConnect** – Contacts for Replacement times selected
- **Manual Fill** – Pick a Replacement by typing in the first 3 letters of their name or Employee ID
- **On-Call** – Pick an employee to assign and they will be notified via email.
- **Long Term Occasional** – This is used to record what occurred.
- **Class Released** – This is used to record what occurred.
- **Emergency Replacement** – Used when a Replacement is not available.
- **Fail To Fill** – Track if you did not fill an absence and need to report on this in the future

On-Call

1. When using On-Call as the fill method, start by typing in the first 3 letters of the employee's name or Employee ID. A list will be generated from the staff list for you to select from.
2. The On-Call will be emailed the details that are included in the absence (e.g. room 5).

2017-09-11	08:15 AM to 11:15 AM	<p>Absent: No Employee Absent</p> <p>Assignment: English</p> <p>Additional Info:</p>	<p>Edit</p> <p>Delete</p>
2017-09-11	08:15 AM to 11:15 AM	<p>Fill Method: On-Call</p> <p>Replacement: John</p> <p>Room & Details: Room 5</p>	<p>Edit</p> <p>Delete</p>

Reviewing & Editing Absences

1. Find the absence that requires editing by searching for it on the **Absence List** or **Search Absence** page then click the **Absence Code** to view the **Absence Details**.
2. To make a change to an absent or Replacement employee record click the **Edit** button for the entry you would like to edit and click **OK** and then **SAVE**.

Bulk Editing Absences

1. In the **EasyConnect** section, select '**Absence List**' or '**Search Absence**' to find the absence. Click on the Absence Code in **Green** to review the details.
2. Scroll towards the bottom of the multi-day absence and select **Bulk Edit**.

<input type="checkbox"/>	2017-10-31	08:30 AM to 03:30 PM	Absent: Dave Benk Assignment: Primary Reason: SICKEMP - Sick Employee YTD Absence: 100%	<input type="button" value="Edit"/>
<input type="checkbox"/>	2017-10-31	08:30 AM to 03:30 PM	Fill Method: EasyConnect Replacement: Charge Back: 122ST100000 - CCC - Daycare Infants and Toddlers Payroll: 100%	<input type="button" value="Edit"/>

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Contact Strategy

Selected: 0 Skipped: 0
 Contacted: 0 Pending: 0

Sending Priority: Normal

3. Enter the details you would like changed in the **Absent Employee Details** and **Replacement Employee Details**.

Absent Employee Details

Time

<input type="checkbox"/>	<input type="text"/>	Absent: (cannot be bulk edited)
to	<input type="text"/>	<input checked="" type="checkbox"/> Assignment: Junior
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Reason: <input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Additional Info: <input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Release Code: <input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/> Absence: <input type="text"/>

Replacement Employee Details

Time

<input checked="" type="checkbox"/>	08:30 AM	Fill Method: (cannot be bulk edited)
to	<input type="text"/>	<input type="checkbox"/> Replacement: (cannot be bulk edited)
<input checked="" type="checkbox"/>	12:15 PM	<input type="checkbox"/> Charge Back: <input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/> Payroll: 50%

Replace charge back information

4. Select the dates you would like the edits applied to and click **Refresh**. **Note:** If you are applying to all records, skip to Step 5.
5. Select the checkbox next to the **Date** and click **Save**. You will now see the updates.

Apply Edits to Selected Records

From: 2017/10/30 To: 2017/10/31

<input checked="" type="checkbox"/>	Date	Time		
<input checked="" type="checkbox"/>	2017-10-30	08:30 AM to 03:30 PM	A	Absent: Dave Benk Assignment: Primary Reason: SICKEMP - Sick Employee Additional Info: Release Code: Absence: 100%
<input checked="" type="checkbox"/>	2017-10-30	08:30 AM to 03:30 PM	R	Fill Method: EasyConnect Replacement: Charge Back: 122ST100000 - CCC - Daycare Infants and Toddlers Payroll: 100%
<input checked="" type="checkbox"/>	2017-10-31	08:30 AM to 03:30 PM	A	Absent: Dave Benk Assignment: Primary Reason: SICKEMP - Sick Employee Additional Info: Release Code: Absence: 100%
<input checked="" type="checkbox"/>	2017-10-31	08:30 AM to 03:30 PM	R	Fill Method: EasyConnect Replacement: Charge Back: 122ST100000 - CCC - Daycare Infants and Toddlers Payroll: 100%

How to Confirm an Absence is Filled

A confirmation email is generated and sent to the Administrator, absent employee(s), and Replacement employee(s) when an absence has been filled. Additionally, the name of the Replacement employee is listed on the **Absence List** page.

Deactivating an Absence or Selected Entries

- Individual selections for the absent employee or Replacement employee can be deactivated by selecting the entry and clicking **DEACTIVATE SELECTION** (A cancellation email will be sent to the Replacement if a Replacement employee selection is deactivated).

<input type="checkbox"/>	2017-08-16	08:30 AM to 03:30 PM	A	Absent: Dave Benk Assignment: Junior Reason: SICKEMP - Sick Employee YTD Absence: 100%	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	2017-08-16	08:30 AM to 03:30 PM	R	Fill Method: EasyConnect Replacement: Charge Back: 122ST100000 - CCC - Daycare Infants and Toddlers Payroll: 100%	<input type="button" value="Edit"/>

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- Deactivate the entire absence by clicking **DEACTIVATE ABSENCE** at the bottom of the **Absence Details** page (The Administrator(s), absent employee(s) and Replacement employee(s) will all receive a cancellation email if the entire absence has been deactivated).

Search Absences and Generate Reports

1. Select **Search Absence** from the EasyConnect section.
2. Enter the Absence Details, Employee Details or Replacement Details (e.g. Fill Method: On-Call) for the desired results.
3. Click **SEARCH** at the bottom of the page to generate a list of absences and then select your desired report and click **EXPORT**.
4. The document will open in an Excel file.

Reviewing Adjustment Logs

The Adjustment Logs capture any changes made to an absence. The following information is recorded in the Adjustment Log when a change has occurred to it:

- Deactivating and re-activating absences
 - Deleting absences
 - Absence Flags
 - Assignment and Assignment Details
 - Post to Job Board date/time and selection
 - Remove from Job Board date/time
1. Individual adjustment logs can be viewed on the **Employee Adjustment Summary** page when you expand a specific entry and click **YES/NO** for “Sent to HR”.
 2. The complete Adjustment Log history can be viewed by clicking **ADJUSTMENT LOG** at the bottom of the **Absence Details** page.

Filtering Emails In Your School Board Outlook or Gmail

EasyConnect will email you when an absence has been created, filled, edited, deactivated and if the absence remains unfilled after contacting all available Replacements.

All emails regarding EasyConnect are sent from info@applytoeducation.com. Here are some tips on how to adjust your email filters in order to better regulate the influx.

1. Filter on the **From:** info@applytoeducation.com
2. Filter on key words included in the **Subject Heading:**
 - a. Assignment Offered
 - b. Filled
 - c. Absence Created
 - d. Still Contacting
 - e. Unfilled
 - f. Cancellation
3. Filter on the **Contents if you want to filter on specifics:**
 - a. School
 - b. Assignment (for example if you only want to see custodian absences)

Be Aware of Pop-Up Blockers

If you click on a button (like 'Calendar' at the top of an Absence List) and the screen flashes without displaying what you want to see its likely you have pop-up blockers turned on.

The Google Chrome web browser has recently changed how they display a blocked pop-up. Now, there is a little square inside the address bar with a red X in it.

If you click on it, you can select to 'Always allow pop-ups from www.applytoeducation.com.

5 Minute Rule: We Value Your Time

If you spend more than 5 minutes trying to figure out a feature, visit our help and training section for tips. Additionally, give us a call toll free at 1-877-900-5627 or email info@applytoeducation.com.

We value your time and are here to ensure you get great service.

Additional Features Based on School District Configuration

Depending on how your EasyConnect settings have been configured for your School District, there are additional options available. Below outlines the steps for the following EasyConnect customizations.

Change Requests After an Absence Has Been Sent to HR

Once an absence has been to “**Sent to HR**”, any edits being performed require approval in order for the absence to be processed. Your Human Resources department will receive a change request for the update that was made and will either ‘**Accept**’ or ‘**Reject**’ the change. All information regarding edits to absences can be viewed through the **Adjustment Log**.

Approving Records for Export

Use your Homepage to monitor your absences or use the Export Workflows page from the EasyConnect section. From the Homepage, simply click on a # to view the absences for the indicated work flow step.

The Absence List on the Export Workflows page will display all records for the approval step you are responsible for. If your School District has permitted the use, you can bulk approve or reject the records displayed. If the bulk approval is not an option, please click on the Code of the record that requires approval, review the details and click the appropriate button (e.g. approved, reject, reviewed, submit, etc.).

<input type="checkbox"/>	2018-02-27	08:30 AM to 03:30 PM	Absent: Dave Benk EIN: 8642 Job: Teacher FTE: 1 Assignment: Primary Reason: BEREAV - Bereavement Leave YTD Additional Info: Release Code: Workflow Status: Ready To Approve	▲ Edit Absence: 100% Auto-populated Sent to HR: No Status: Active
<input type="checkbox"/>	2018-02-27	08:30 AM to 03:30 PM	Fill Method: EasyConnect Replacement: Charge Back: 122ST100000 - CCC - Daycare Infants and Toddlers	▼ Edit Payroll: 100% Auto-populated

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BULK EDIT DEACTIVATE SELECTION

Contact Strategy

Selected: 0 Skipped: 0
 Contacted: 0 Pending: 0

REVIEW CONTACTS ADD CONTACTS

Sending Priority: Normal

ADJUSTMENT LOG DELETE ABSENCE DEACTIVATE ABSENCE COPY ABSENCE

APPROVE EDIT

Date	Time		
<input type="checkbox"/> 2018-02-27	08:30 AM to 03:30 PM	Absent: Dave Benk Assignment: Primary Reason: BEREAV - Bereavement Leave YTD Workflow Status: Ready to Export	Absence: 100% Auto-populated Edit

Customizing your School

1. From the **Administration** section click on **Schools** to view the list of schools in your District.
2. Click on the **Name** of your school to edit the details.
3. Set-up your location's **Default Absence Times**, **Employee Groups** (only add an employee group that is not already included on your staff list), **Location Information**, **Absences On-Hold**, for each employee group at your school.
4. Select the **Default Absence Flags** that will be visible in every absence made for your school (in order to remove the auto-selection of a flag simply deselect it).
5. Click **SAVE** when you are finished performing your updates.

Employee Groups

Select the Employee Groups to always include when creating absences, even if there are no staff at this location for that group.

- Elementary Teacher
- Secondary Teacher
- Elementary LTO
- Secondary LTO
- Principals/Vice-Principals
- P/VP LTO

Default Absence Times

Employee Group	From	To	Location Information	Absences On-Hold	Include Multi-Day Absences	Never Automatically Release
Elementary Teacher	09:15 AM	03:45 PM	Please arrive at least 15 minutes before a morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elementary LTO	09:15 AM	03:45 PM	Please arrive at least 15 minutes before a morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Principals/Vice-Principals	08:00 AM	04:00 PM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Assistants	08:00 AM	04:00 PM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Default Absence Flags

<input type="checkbox"/> Behaviour Management	<input type="checkbox"/> Grade 1	<input type="checkbox"/> Grade 6	<input type="checkbox"/> Outdoor Duty	<input type="checkbox"/> Swimming
<input type="checkbox"/> Field Trip	<input type="checkbox"/> Grade 2	<input type="checkbox"/> Grade 7	<input type="checkbox"/> Phys. Ed.	<input type="checkbox"/> Toileting
<input type="checkbox"/> First Duty	<input type="checkbox"/> Grade 3	<input type="checkbox"/> Grade 8	<input type="checkbox"/> Presence of Fifth Disease	<input type="checkbox"/> Wheelchair Not Accessible
<input type="checkbox"/> French	<input type="checkbox"/> Grade 4	<input type="checkbox"/> Kindergarten	<input type="checkbox"/> Second Floor No Elevator	<input type="checkbox"/> Yard Duty
<input type="checkbox"/> French Preferred	<input type="checkbox"/> Grade 5	<input type="checkbox"/> Lifting	<input type="checkbox"/> Special Needs Support	

Absences On-Hold

The **Absences On-Hold** feature must be turned on for specific Employee Groups by your HR dept in order for it to be used.

The number of absences you wish to place on hold to prevents EasyConnect from automatically filling the absence with a Replacement.

Absences On-Hold are easily identified through your EasyConnect dashboard from your employer Homepage.

Absences	Today	After Today
Absences On Hold	0	57
Absences missing replacement strategy	5	10

Absences On-Hold can be filled with an on-call, manually filled or filled by EasyConnect at any time. To release absences from being on-hold click **RELEASE TO EASYCONNECT** from the **Absence List** (bulk release) or **Absence Details** (individual absences) page.

<input type="checkbox"/>	2017/01/16 A	09:00 AM to 03:30 PM	Absent: Edson Reason: SL - Sick Leave YTD	Absence: 100%	▼ Edit
<input type="checkbox"/>	2017/01/16 R	09:00 AM to 03:30 PM	Fill Method: EasyConnect Replacement: Charge Back: 0772ST000000 - Sch OT Budget SL/PersLve/StaffSprt/Brvt/RelHolyDay	Payroll: 100%	▼ Edit

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[DEACTIVATE SELECTION](#)

Contact Strategy

Selected: 440 **Skipped:** 440
Contacted: 0 **Pending:** 0

[REVIEW CONTACTS](#) [ADD CONTACTS](#)

Sending Priority: Turbo

Job Board: This absence is posted to the job board
Post to Job Board: 2017/01/15 08:00 PM
Remove from Job Board: 2017/01/16 09:10 AM

[ADJUSTMENT LOG](#) [RELEASE TO EASYCONNECT](#) [DELETE ABSENCE](#) [DEACTIVATE ABSENCE](#) [COPY ABSENCE](#)

[EDIT](#)

Replacement Employees Cancelling Accepted Assignments

If a Replacement Employee cancels an accepted assignment within a pre-determined timeframe set by your HR department the following will occur:

- A cancellation email is sent to the Administrator and includes the reason for cancellation and the fill method used to fill the absence.
- EasyConnect will resume contacting Replacements during your contact times if the 'EasyConnect' fill method was used to fill the absence and Replacements are still available. If the Fill Method was not 'EasyConnect' the Administrator will need to manually put the absence back into the system.
- The Replacement is blocked from accepting other assignments for that day from the EasyConnect Job Board. They can still receive offers through the phone/text and can be filled manually for assignments.

Employees Cancelling Accepted Assignments

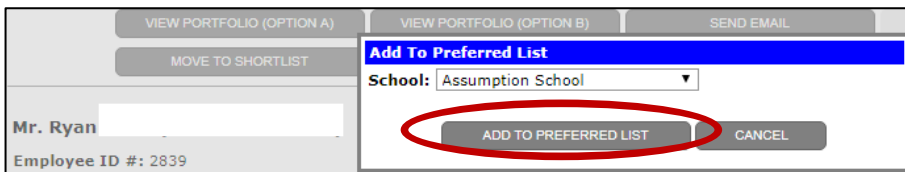
If an Employee cancels an accepted assignment within a pre-determined timeframe set by your HR department the following will occur:

- A cancellation email is sent to the Administrator and includes the reason for cancellation
- The Replacement will receive a notification email and they are made available to accept other Assignments.

Adding Replacement Employees to a Preferred Contact List

When Replacement Employees are added to a Preferred List, EasyConnect will contact the listed employees first before all other employees are offered the assignment. Approved qualifications are not respected when a Preferred List is enabled for a specific employee group.

1. From the **Applicants** section click on **Search Applicants**. Enter your search criteria (e.g. first and last name of employee) and click **Search**
2. From the **Search Results** page click directly on the name of the employee. On the **Applicant Info** page click the **ADD TO PREFERRED LIST** button
3. Ensure that your School/Location is listed in the drop-down box and then click **ADD TO PREFERRED LIST**
4. The employee will be listed on your **Contact Lists** page in the **EasyConnect** section



Adding Replacement Employees to a Preferred List By Employee

1. Under the **EasyConnect** section, select **Staff List**.

Staff List						
School Name: Cundles Heights						
EIN	First Name	Last Name	Email	Employee Group	FTE	Preferred List
8642	Dave	Benk	ekhelfa@applytoeducation.com	Teacher Elementary	1.00000	Details
4321	Dave	Benk	ekhelfa@applytoeducation.com	Teacher Elementary	1.00000	Details
4561	Anne	Blondin	mlaurie@applytoeducation.com	Teacher Elementary	1.00000	Details
45678	Samantha	Collard	dean@dean.com	Educational Assistants	1.00000	Details
2839	Ryan	Kirsh	ryankirsh@hotmail.com	Teacher Elementary	1.00000	Details
6789	Latoya	Morgan	lmorgan@applytoeducation.com	Teacher Elementary	1.00000	Details
3355	Rita	Port	mpboardem@pass.ca	Teacher Elementary	1.00000	Details

2. Select details under the **Preferred List** across from the Employees name.
3. Select your **Preferred Replacement** by typing their name or Employee ID. Select the correct person from the drop-down list and click **Add**

Preferred List

Employee (EIN): Dave Benk (8642)

Preferred Replacement:
2839 - Ryan Kirsh (ATE Test Account)

ADD
CANCEL

There are no occasional employees in this list.

Note: If a Replacement is removed from the casual list they are automatically removed from being contacted.

First Contact

1. From the **EasyConnect** section, select **Create Absence**. Select Location, Employee Group (e.g. Elementary Teacher, ECE, etc.) and if the absence requires a Replacement (Y/N).
2. Select your **First Contact** by typing the Replacement name or Employee ID. Select the correct person from the drop-down list.

Absence Details

Back to search results

Location:

Employee Group:

Replacement: Yes No

First Contact:
8642 - Dave Benk

3. Create the absence and click **Save**.

Turn Off EasyConnect Emails

If your board has enabled the ability for you to unsubscribe from EasyConnect Emails, click on 'User Profile' under the User Profile section. You can deselect 'Receive emails from EasyConnect'

EasyConnect Preferences

This user receives e-mail from EasyConnect