



# Employee How To

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**IMPORTANT!** To activate your willSub® account, simply log into [www.willsub.com](http://www.willsub.com) and enter your User ID and PIN. You will be asked to review your account information for accuracy. If you have any questions, contact your building's willSub Administrator or willSub Client Engagement at 1-877-855-7264.

The willSub® system is designed to minimize the tasks associated with finding substitutes for staff. As an employee, you can access willSub 24 hours a day, 7 days a week, either by telephone or the Internet. Simply enter your unique willSub® User ID and 4-digit PIN. Once that is done, you simply select the option to enter an absence, enter the date of your absence, the duration you will be gone, and finally the type of absence you are requesting. Through the website, you can even leave class notes for the substitute filling in for you, or attach lesson plans to the absence! It's that fast and easy! The system also has simple reporting features designed to track your absences and view willSub's search progress in securing a substitute for your class. You may also select preferred substitutes, and willSub will attempt to contact these substitutes first whenever you enter an absence request.

On the next several pages, you will find the *willSub® Training Manual*, containing important information and documentation to get you started in using your account.

**Welcome to willSub!**



# How To: Employee General Info

Welcome to willSub®!

Most educators discover that willSub is intuitive and user friendly. After a few minutes of setup, willSub makes the process of covering your classroom or position fast, easy, and accurate.

### **To begin:**

Go to [www.willsub.com](http://www.willsub.com). The screen will prompt you to review and confirm your account information. You only have to do this once to activate your account, and then you will be able to log in with your User ID and PIN, and go right to your account dashboard.

This training manual is designed to provide answers to your most frequently asked questions, and documentation on performing the most common tasks. If your particular question has not been covered, please call our Client Engagement number below for assistance.

Log into the willSub website to verify your information and set your sub preferences(Page 4), further personalize your account(Page 5) and record your voice signature(Page 6). Please complete these three items before the start of the school year so willSub can accurately match your substitute teacher needs.

### **There are three main things that willSub can do for you:**

1. Allows you to enter requests for days off.
2. Tracks and summarizes your days off at a glance.
3. Lets you select your preferred subs and excluded subs.

### **A few things to remember:**

When you enter requests for absences in the system, some requests go to the building administrator for approval(Page 11). Once your request is approved by the proper authority, it will then be released to system to be covered by a substitute.

All approved absences will be displayed on you account dashboard(Page 4).

Within the willSub system, you can request certain subs to be prearranged and/or preferred for your classroom or position(Page 5), and depending on your school district's policies, you may be able to exclude specific substitutes as well.



# How To: Set Up Your Account

Your name and the school you work in.

**Staffing Made Simple**

**willSub**

Home Requests Information Reports

Cathy Holland - Reagan Elementary

**My Requests**

Duration: ● = Full Day ● = Employee Arrives Late ● = Employee Leaves Early ● = Employee Leaves and Returns

Status: ☒ = by Phone ● = By Web ✎ = Prearranged ○ = Open ✖ = Unfulfilled ✖ = Canceled ✖ = Not Approved

| Ref.  | Date       | Days       | Duration | Type                       | Status | Fulfilled By     |
|-------|------------|------------|----------|----------------------------|--------|------------------|
| 14032 | 10/21/2015 | 0.5 d      | ●        | School Business            | ✎      | Susan Townsworth |
| 14033 | 10/28/2015 | 0.5 d      | ●        | School Business            | ✎      | Danny Parsons    |
| 14031 | 2/17/2016  | 1.0 d      | ●        | Sick Day-Family Illness    | ✎      | Christopher Cope |
| 13934 | 4/27/2016  | 0.5 /0.5 d | ●        | School Business /Union Day | ●      | Jill Hanowiak    |
| 14179 | 5/5/2016   | 1.0 d      | ●        | Medical                    | ●      | Michell Bird     |
| 14056 | 5/12/2016  | 1.0 d      | ●        | Professional Development   | ●      | Michell Bird     |
| 13991 | 5/27/2016  | 1.0 d      | ●        | Medical                    | ●      | Michell Bird     |

Willsub absence call-in number (877) 945-5782

This table shows the days you've taken off, the absence reasons, how they were filled, and which subs filled in for you.

## Now let's explore the Information Menu

### To add preferred subs to your list:

Click Information and My Preferred Subs  
Choose your subs and click to add to or delete from list.



**Notice:** You may add or delete subs from this list whenever you would like. These subs will be contacted first for your requests. If these subs are already working, willSub will contact subs from the general list.

**Staffing Made Simple**

**willSub**

Home Requests Information Reports

Cathy Holland

- My Information
- Building Substitutes
- My Preferred Subs...**
- My Excluded Subs...
- District Calendar
- Leave Codes
- Employee How To
- Willsub Training

**My Preferred Substitutes:**

**Use the form below to add substitutes.**  
Select a substitute and click 'Add Sub.' to add to your preferred list.

**Use the form below to remove preferred substitutes.**  
Select a substitute and click 'Delete Sub.' to remove from your preferred list.

**Your Preferred Substitutes:** Brittnee Bretschneider, Jill Hanowiak, Danny Parsons, Susan Townsworth

# How To: Set Up Your Account



## Additional Information Menu Items:

### Use the Information tab to further explore and customize your account

- |                             |   |
|-----------------------------|---|
| <b>My Information</b>       | Update personal, classroom, and contact information. <i>Adding your schedule in Job Notes is very helpful if you work in multiple buildings.</i>  |
| <b>Building Substitutes</b> | View a list of available substitutes for your building.   |
| <b>District Calendar</b>    | View days during which your school district is closed or has days scheduled differently than a typical day.   |
| <b>Leave Codes</b>          | View the leave types available to you, any approval rules applicable to that leave type and the associated two digit phone codes for entering requests over the phone. <a href="#">Click Here</a> to view available leave codes |
| <b>Employee How To</b>      | View a guide to using willSub and download a pdf file for future use.   |
| <b>willSub Training</b>     | Download a training video on using your willSub account.  |



## How To: Set Up Your Account

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### Voice Signature

Welcome to the voice signature component of willSub®. This will allow the substitute to hear your voice and know exactly which class, location and schedule they will be working that day. Many subs indicate they like to know who they are subbing for so they may prepare accordingly. An example of a voice signature would be: "Greta Montvoy, 3rd grade Art" —it's basically like a voice mail header.

This will take approx. 45 seconds to record, and you will need your User ID and PIN.

1. Dial **1-877-945-5782 (WILLSUB)**.
2. Enter your User ID followed by #.
3. Enter your PIN followed by #.
4. Press #9 and record your voice signature at the beep.
5. To accept, press #.
6. Hang up.



# How To: Enter a Request Online

## Requests for days off can be entered in two ways:

1. **Regular**—when you need willSub® to find a sub for you.
2. **Prearranged**—you and the sub have already agreed upon a date they will work for you.

### To add a new regular request:

- Go to Requests
- Click New Regular Request

A regular request is entered when you need willSub to find a substitute to cover your class or position. Once confirmed, the system will immediately look for a sub based upon your preference list, unless the request requires approval from the school. Each request lets you add notes for the substitute and/or administrators. ***Files for lesson plans can also be attached to the request after it is entered.***

The screenshot shows the willSub web interface. The user is logged in as 'Cathy'. The navigation menu includes Home, Requests, Information, and Reports. The 'Requests' menu is open, showing options for 'New...', 'Pending Requests...', 'New Regular Request', 'New Prearranged Request', and 'New Request'. The 'New Regular Request' form is displayed with the following fields and callouts:

- Date of absence:** A date picker calendar for May 2016 is shown, with the 6th of May selected. Callout: "Use the pop-up calendar to select your requested day off."
- Type:** A dropdown menu currently set to "- Please Select -". Callout: "Use the drop down menu to choose the type of leave you are taking."
- Split Leave Type:** A dropdown menu currently set to "N/A".
- Sub Required:** A dropdown menu currently set to "Yes". Callout: "Indicate Yes or No if you require a sub for that time off."
- Number of Days:** A dropdown menu currently set to "1".
- Duration:** A dropdown menu currently set to "Employee will be leaving early".
- Shift Start:** 8:10 AM, **Shift End:** 3:05 PM
- Leaving at:** Time selection fields currently set to "1" hour and "00" minutes. Callout: "Specify how long you will be gone (either the time YOU will leaving or when YOU will be returning). A full day off does not require a specific time."
- Notes for Substitute:** A text input field.
- Notes for Administrator:** A text input field.
- Continue:** A blue button at the bottom of the form.

### To Add a Prearranged Absence:

- Go to Requests
- Click New Prearranged Request

Entering a prearranged request is the same as a regular request, except a specific substitute is selected to fill in on your day off. The same approval rules apply to prearranged requests, so if the type of leave you select requires school approval, the request will not go through until it is approved. ***Contact the substitute first to confirm their availability and interest. Once a prearranged request is entered, willSub will send the sub a confirmation email.***



# How To: Review and Manage Requests

## Request Review and Confirmation

After entering the request information and selecting 'Continue', the request will be presented for your review. If all details are correct, select 'Finish' to finalize the request. Depending on the type of request, it will be designated as either 'Approved' or 'Pending'.

**Verify New Request:**

| Please verify request information.   |   |
|--|---|
| Date of absence :  | 05/13/2016  |
| Type :   | Personal, Calculated Leave 1 d  |
| Sub Required :   | Yes   |
| Number of Days :   | 1   |
| Duration :   | Full Day Absence  |
| Notes for Substitute :   |   |
| Notes for Administrator :  |   |
| Leave Policy Status :  | Pending   |
| <div style="border: 1px solid black; padding: 2px; display: inline-block;">Select 'Finish' to finalize and submit.</div> | <input type="button" value="Finish"/> <input type="button" value="Back"/> |

Request will be marked either 'Pending', requiring further approval, or 'Approved'.

### To view your requests pending approval:

- Go to Requests
- Click Pending Requests

It's a good idea to regularly check the status of your pending requests. If they are still pending, a building or district administrator needs to review and approve them—they will not go to willSub for processing without approval. ***Once your pending request is approved, you will receive an email update.*** A sick leave typically does not require approval and is released immediately for processing. This assures that when you request a sick day the morning of or the night before class, willSub will get right on it and find you a sub!

Home
Requests
Information
Reports

Cathy New... Elementary

Pending Requests...

Pending Requests

| Date                      | Days | Duration | Type       | Sub Needed  |
|---------------------------|------|----------|------------|---|
| <a href="#">5/13/2016</a> | 1    | Full Day | Personal / | Yes <span style="float: right;"><a href="#">-delete-</a></span> |

Click to Review or add notes

Click to cancel Pending Request





# How To: View and Manage Requests

## Managing Absence Requests:

To add information to an absence in willSub, just click on the reference number of the submitted absence request.

Home | **Requests** | Information | Reports

Cathy Holland - Reagan Elementary

My Requests

Duration: ● = Full Day ● = Employee Arrives Late ● = Employee Leaves Early ● = Employee Leaves and Returns

Status: ☎ = by Phone ● = By Web ✂ = Prearranged ● = Open ✖ = Unfulfilled ✖ = Canceled ⚪ = Not Approved

| Ref.                  | Date       | Days       | Duration | Type                       | Status | Fulfilled By                     |
|-----------------------|------------|------------|----------|----------------------------|--------|----------------------------------|
| <a href="#">14032</a> | 10/21/2015 | 0.5 d      | ●        | School Business            | ✂      | <a href="#">Susan Townsworth</a> |
| <a href="#">14033</a> | 10/28/2015 | 0.5 d      | ●        | School Business            | ✂      | <a href="#">Danny Parsons</a>    |
| <a href="#">14031</a> | 2/17/2016  | 1.0 d      | ●        | Sick Day-Family Illness    | ✂      | <a href="#">Christopher Cope</a> |
| <a href="#">13934</a> | 4/27/2016  | 0.5 /0.5 d | ●        | School Business /Union Day | ●      | <a href="#">Jill Hanowiak</a>    |
| <a href="#">14179</a> | 5/5/2016   | 1.0 d      | ●        | Medical                    | ●      | <a href="#">Michell Bird</a>     |
| <a href="#">14056</a> | 5/12/2016  |            | ●        | Professional Development   | ●      | <a href="#">Michell Bird</a>     |
| <a href="#">13991</a> | 5/27/2016  |            | ●        | Medical                    | ●      | <a href="#">Michell Bird</a>     |

Willsub absence call-in number (877) 945-5782

*Click the Reference number to add information to a request.*

You can upload a lesson plan for the substitute covering your absence as well as add or edit notes for your school and/or the sub. You can also cancel the absence if you no longer need the day off (depending on district policy). ***You will be asked if willSub should notify the sub of the cancellation. When you click 'Yes', the sub will receive phone calls and an email alerting them of the cancellation. Anytime a change is made to an absence request, you will receive an email update. Absences cannot be cancelled after the starting time of the request.***

You may edit the notes and click the update button to save them.

**Cathy Holland**  
1 day Professional Development request on 5/12/2016.

Status: Fulfilled Via Web  
Substitute: Michell Bird

Emp. Time 1 type: Professional Development 1 d  
Emp. Time 2 type: N/A 0 d

Request Log  
Entered on 04/12/16 at 4:11 PM by Cathy Holland-T.  
Approved on 04/12/16 at 4:11 PM by Policy.  
Fulfilled Via Web on 04/13/16 at 11:27 AM by Michell Bird.  
Edited on 4/28/2016 at 10:13 AM by Nancy Davis.  
- Type changed from Medical to Professional Development.  
- Edit Notes: Autism seminar

File to upload:  No file chosen

Notes to Administration:

Notes to Substitute:

*Click 'Choose File' button to select a lesson plan to attach to the absence.*

*Add notes for administration and/or the substitute.*

*Click 'Update' to save.*

*Click 'Cancel' to remove request.*



## How To: Enter a Request Over the Phone

### A. Place call to willSub®:

Dial (877) WILLSUB or (877) 945-5782.

### B. Enter User ID followed by the #.

### C. Enter PIN followed by the #.

### D. Select your request type:

#### 1—Absence Request

- a. Enter the 2-digit district leave code specific to your school (leave codes can be found under the 'Information' menu in your willSub account).

#### 7—Cancellation

#### 9—Record Voice Signature

### E. Select your request options:

#### 1—Full Next Day

- a. Review Request Data:  
Press 1 to accept, 2 to accept without a substitute needed, or 3 to reschedule.

#### 2—Partial Next Day

- a. Select 1—Arriving Late or 2—Leaving Early
- b. Enter arrival/departure time in 4-digit military format (i.e. 1430 = 2:30pm)
- c. Review Request Data:  
Press 1 to accept, 2 to accept without a substitute needed, or 3 to reschedule.

#### 3—All Other Days

- a. Enter Request Start Date in 6-digit MMDDYY format
- b. Enter Number of Days for the request
- c. Enter Full Day or Partial Day:  
If partial day, select 1—Arriving Late or 2—Leaving Early
- d. Review Request Data:  
Press 1 to accept, 2 to accept without a substitute needed, or 3 to reschedule.

**\*NOTE:** Current or next day Sick/Medical requests are typically preapproved; other requests may need to be reviewed and approved by a school administrator. Until a request is approved, willSub will not attempt to fulfill it.



# How To: Reports

## Reports Menu:

Go to Reports  
Click Request Summary

Choosing the Request Summary Report will produce an analysis of all leave requests entered for you during the school year. You will see the number and percentage of total requests broken out by day and month as well as the number and types of leaves taken. Additionally, you will see each individual request entered, showing the specific details of the request. ***If you use up your allocation of an absence leave type, willSub will not let you enter another one; you will need to enter a different absence type to process the request.***

Home
Requests
Information
Reports

**Cathy Holland - Reagan Elementary**

Request Summary 15-16

Request Summary 14-15

| Day       | # | %    | Type                     | Used |
|-----------|---|------|--------------------------|------|
| Monday    | 0 | 0.0  | Medical                  | 2.00 |
| Tuesday   | 0 | 0.0  | Professional Development | 1.00 |
| Wednesday | 4 | 57.1 | School Business          | 1.50 |
| Thursday  | 2 | 28.6 | Sick Day                 | 1.00 |
| Friday    | 1 | 14.3 | Union Day                | 0.50 |

| Name                    | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total |
|-------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Cathy Holland /absences | 0   | 0   | 0   | 2   | 0   | 0   | 0   | 1   | 0   | 1   | 3   | 0   | 7     |
| / time                  | 0   | 0   | 0   | 1   | 0   | 0   | 0   | 1   | 0   | 1   | 3   | 0   | 6     |

| Ref#  | Date       | # Days | Time 1 | Type 1                    | Time 2 | Type 2    | Substitute       | Status            |
|-------|------------|--------|--------|---------------------------|--------|-----------|------------------|-------------------|
| 14032 | 10/21/2015 | 1      | 0.5    | School Business           | 0      | N/A       | Susan Townsworth | Prearranged       |
| 14033 | 10/28/2015 | 1      | 0.5    | School Business           | 0      | N/A       | Danny Parsons    | Prearranged       |
| 14031 | 2/17/2016  | 1      | 1      | Sick Day - Family Illness | 0      | N/A       | Christopher Cope | Prearranged       |
| 14052 | 4/14/2016  | 1      | 1      | Medical                   | 0      | N/A       | Ian Grifka       | Canceled          |
| 13934 | 4/27/2016  | 1      | 0.5    | School Business           | 0.5    | Union Day | Jill Hanowiak    | Fulfilled Via Web |
| 14179 | 5/5/2016   | 1      | 1      | Medical                   | 0      | N/A       | Michell Bird     | Fulfilled Via Web |
| 14043 | 5/12/2016  | 1      | 1      | Jury Duty                 | 0      | N/A       |                  | Canceled          |
| 14056 | 5/12/2016  | 1      | 1      | Professional Development  | 0      | N/A       | Michell Bird     | Fulfilled Via Web |
| 13991 | 5/27/2016  | 1      | 1      | Medical                   | 0      | N/A       | Michell Bird     | Fulfilled Via Web |