connect by sentient

Client User Guide

January 2021

con nect

by sentient

User Guide for Clients

TIP: Ctrl + Click on the Topic to go directly to the page

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HELP

If you need any support in using Sentient Connect, please contact the staffing coordinators at staffingcoordinators@sentienthr.com. You may also call (905) 752-8120 ext. 1 to speak with a staffing coordinator during Sentient's business hours.

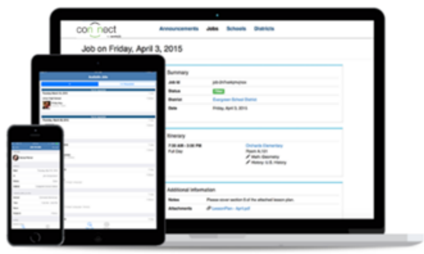
Introduction: What is Connect?

Connect is Sentient HR Service's state-of-the-art **connection** platform; a substitute staff placement system.

As a Client Administrator, you can easily create, assign, transfer, and cancel substitute jobs, as well as send notifications and view reports. Sentient's Supply Staff can review and accept your posted substitute jobs, be requested for jobs they are qualified for, see notifications, and track their work history directly in the system.

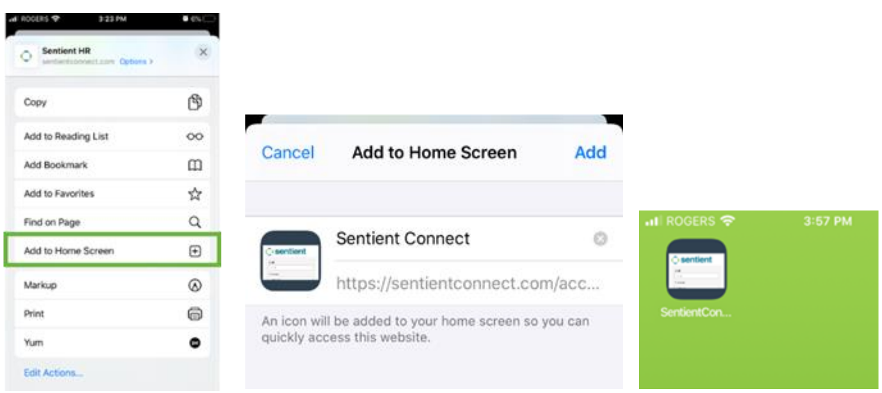
Available on any device, anytime, anywhere.

Connect makes your job simple whether you're at your PC or on the go, 24/7.



Create a 'Connect' Shortcut Icon on Your Mobile Phone Screen

One your mobile device, open Safari and navigate to the Connect website. To create a shortcut icon on an iphone home screen, tap on the **Share Icon** in the bottom toolbar. When the share options appear, tap on **'Add to Home Screen'**. Optionally, change the shortcut name to Sentient Connect. Press **Add** at the top right and the shortcut will appear. *(the process is similar for other mobile devices)*



The icon will appear on your home screen like any other app, so you can drag it around and put it where you like.

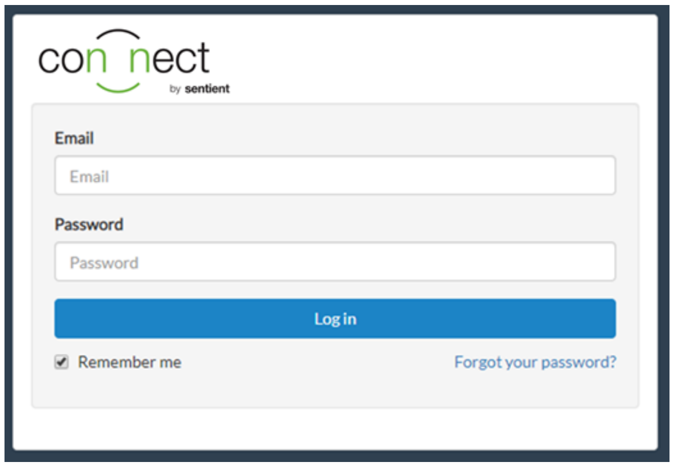
Log In

Once your account is activated, you will receive a **Welcome Email** with a <u>temporary password</u>. You can then update your password for future logins.

TIP: Keep your passwords strong! Use a minimum of 8 symbols, including numbers, both uppercase and lowercase letters, and special symbols.

www.sentientconnect.com

Enter www.sentientconnect.com into your internet browser, enter your **Email** and **Password**, and click the **Log In** button.



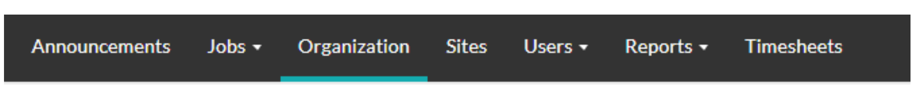
If you would like Sentient Connect to remember your username and password, make sure to check the **Remember Me** box towards the bottom left corner of the screen.

Your Company Account

What is an Organization?

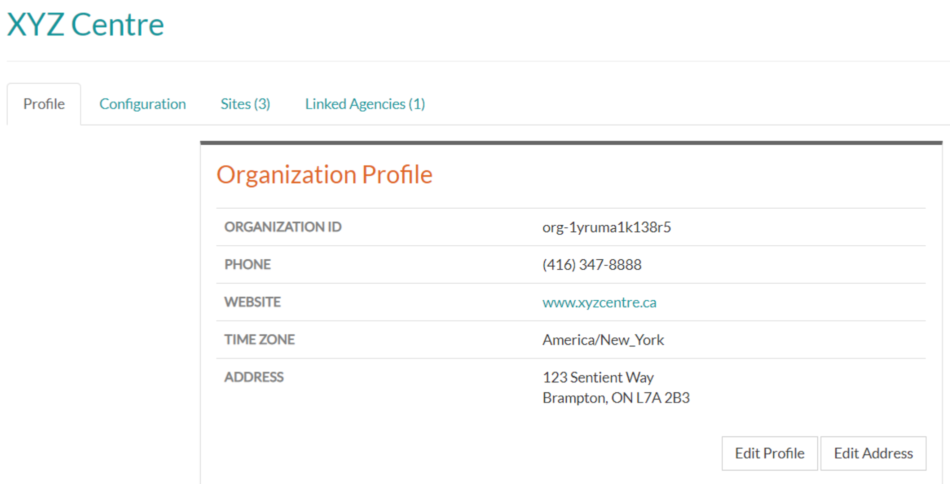
An Organization is the parent entity and has one or more Sites operating beneath it. The relationship between an organization and its sites can be compared to that of a district and its schools.

For example, Centres for Early Learning (CFEL) is designated as an Organization. A site under the CFEL Organization would be: CFEL Denton Place, CFEL West Hill, CFEL Dawes Road, etc.



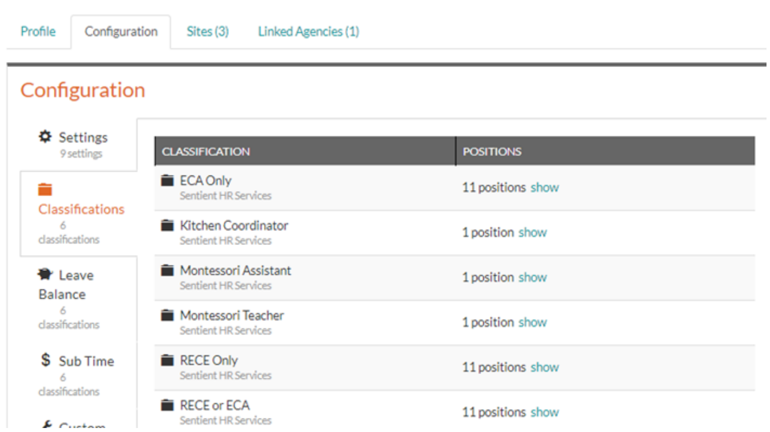
Organization Profile

The Organization Profile can be found on the main navigation menu under **Organization** and includes your organization's name, Client ID, physical address, phone number, website, and time zone. You can edit this information from the **Edit Profile** and **Edit Address** buttons.

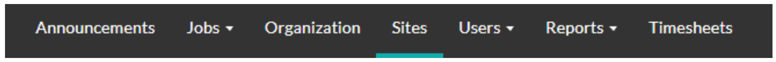


Configuration – Classifications / Positions

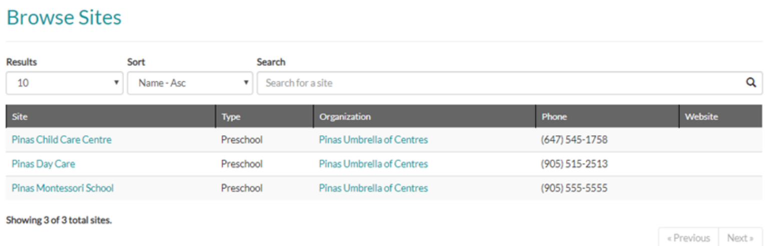
Classifications provides the details of the types of positions at your centre. Should you need to modify or update this section, please contact the staffing coordinators at staffingcoordinators@sentienthr.com. You may also call (905) 752-8120 ext. 1 to speak with a staffing coordinator during Sentient's business hours.



What is a Site?

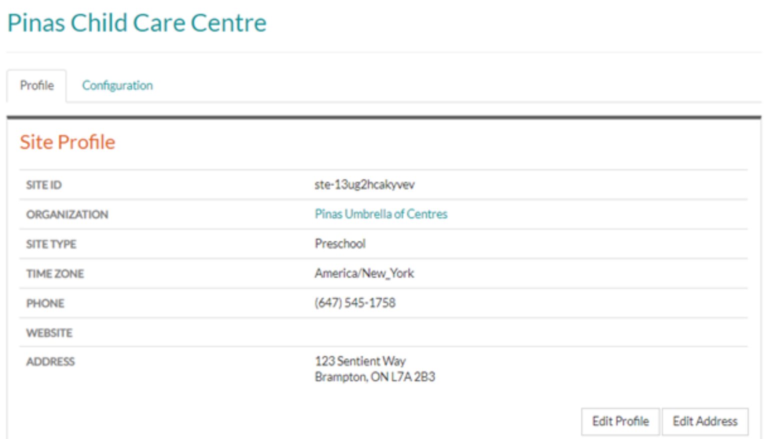


A Site operates underneath its parent Organization as a centre operates under its multi-site organization. **Sites** can be accessed from the main navigation menu and also have profile information including name, address, phone number, and URL.



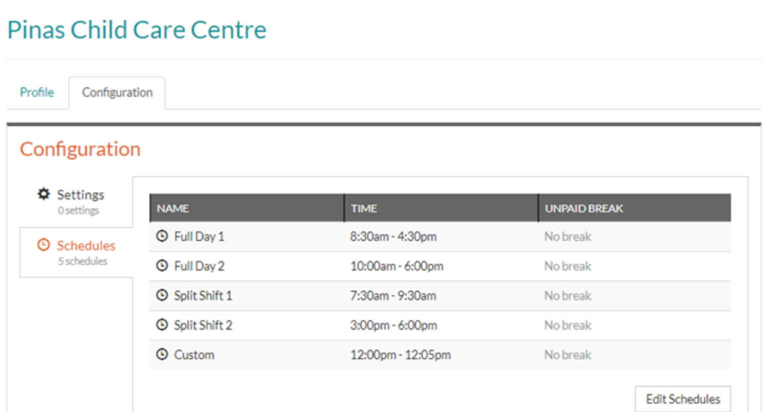
Site Profile

The Site Profile provides contact information for the Site and is unique from its parent organization. To view and/or update your Site information, click on the main menu **Sites** option followed by the name of the Site. Within the Site Profile tab, select **Edit Profile** and update the Site's information accordingly.

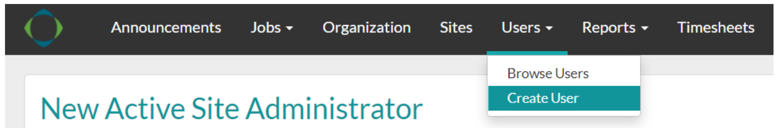


Configuration - Schedules

Schedules provides a typical time schedule. Administrators can adjust the times when posting a new job.

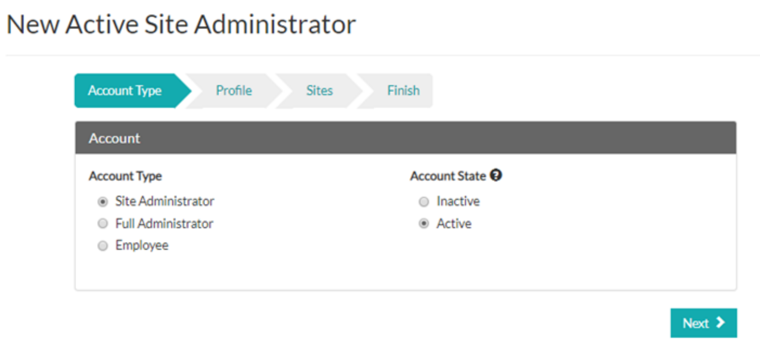


Administrator Account

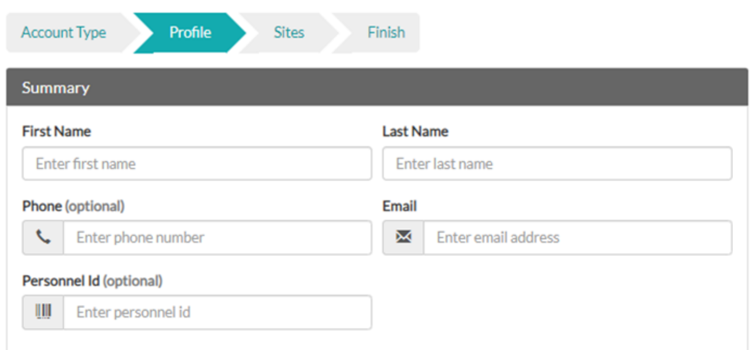


To create an individual Administrator account, select **Create User** under the **Users** drop-down on the main navigation bar.

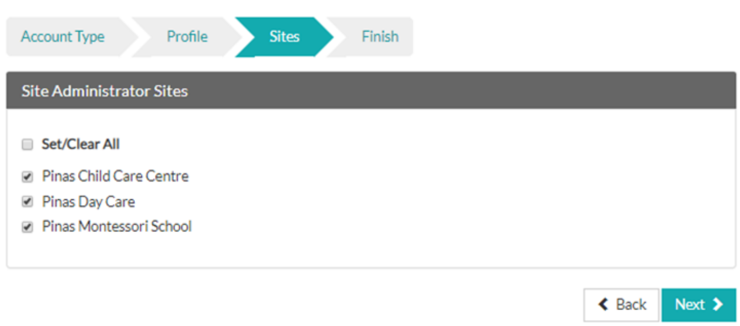
- **Step 1 - Account Type tab:** Select the Full or Site Administrator option followed by Active if you would like them to receive the welcome e-mail, or Inactive if you would like to activate them at a later time.



- **Step 2 - Profile tab:** Enter the Administrator's name, phone number, and e-mail address.



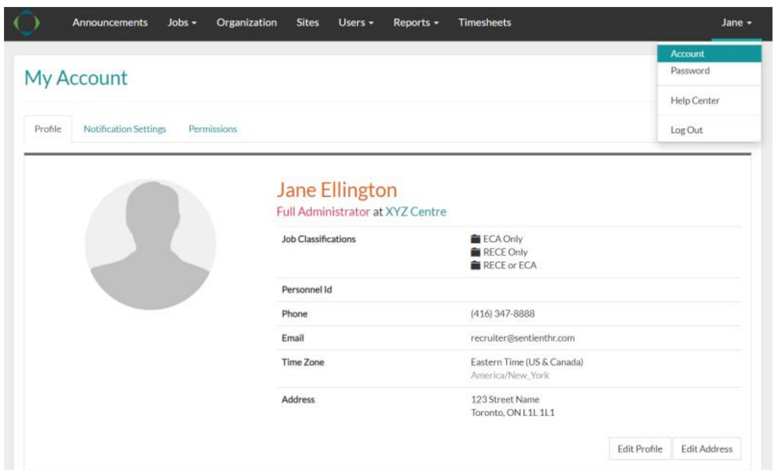
- **Step 3 - Sites tab (site Administrators only):** Select one or more sites, which will determine the jobs they can view, edit, and approve. Full Administrators are turned on for all sites.



- **Step 4 - Finish tab (site Administrators only):** Review and select Create User button when ready.

Update your Profile

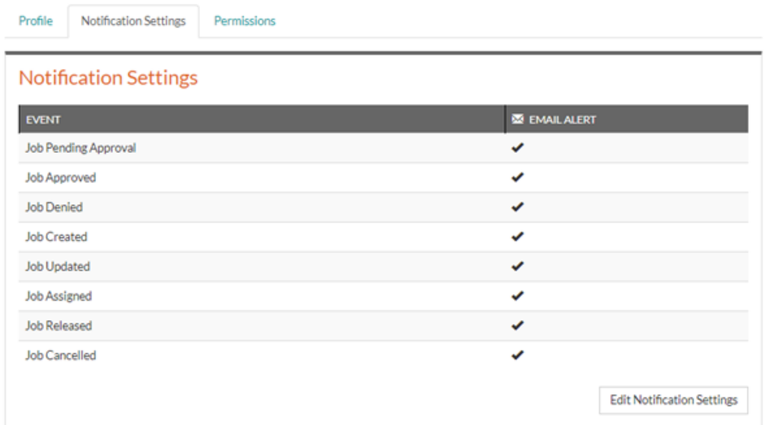
To access your personal account information, hover over your **Name** at the top right corner of the screen and select the **Account** option from the drop-down menu.



You will see three tabs:

1. **Profile** - To edit your name, address, and phone number, click on the **Edit Profile** button at the bottom right of the screen.

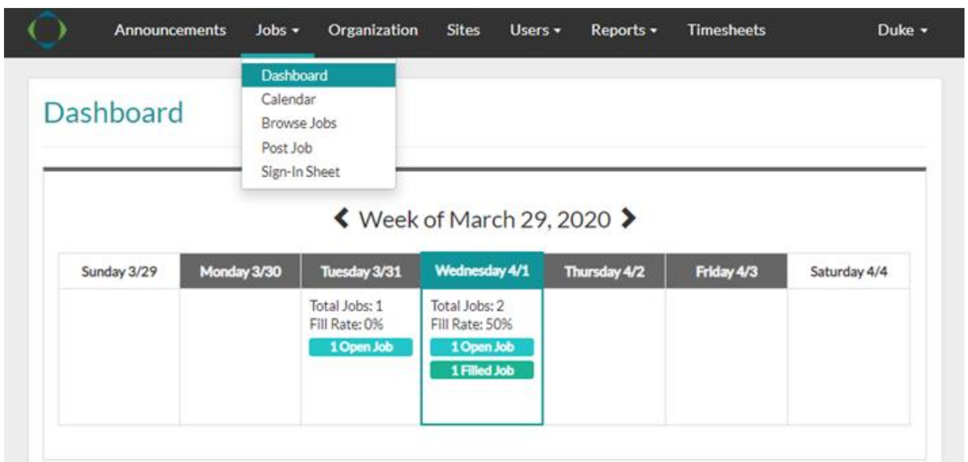
2. **Notification Settings** - The setting is an important step when setting up your account properly. You may adjust your settings to be notified via e-mail when a job is created, edited, or cancelled, as well as when a substitute accepts or cancels a job (removes him/herself), and if they have provided feedback on their work experience. Select **Edit Notification Settings** button at the bottom right of the screen to edit.



3. **Permissions** - not used at this time.

Dashboard

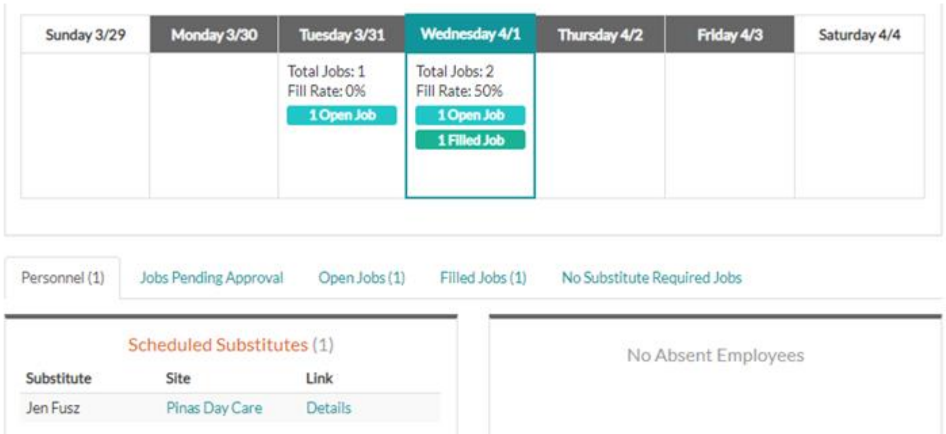
The Sentient Connect Dashboard is a great tool for managing your scheduled substitute staff. At the top of the page is a weekly account of all open and filled jobs.



Towards the bottom of the page is additional job-related information for the selected day above (*in the above example, Wednesday 4/01 is selected*). This section has five tabs:

1. **Personnel**

   The **Personnel** tab highlights all absences 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.



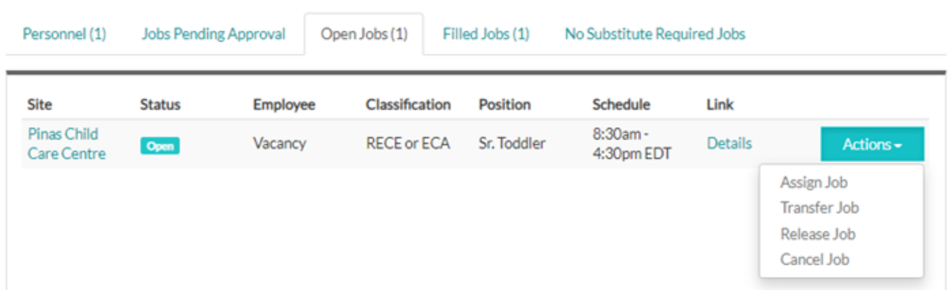
2. **Jobs Pending Approval** *(Only applicable if <u>your centre</u> uses Sentient Connect system to manage <u>your employee</u> absence requests*)*

The **Jobs Pending** tab shows absence requests pending Administrator approval. You can approve or deny absences by clicking the **Action** button followed by **Approve** or **Deny**. This is used when an employee of your centre inputs a request to be absent for a future date.

** It is optional to allow your employees to book days off using Sentient Connect. Please contact your Sentient Staffing Coordinator should you wish for your employees to request time off using this system.*

3. **Open Jobs**

The **Open Jobs** tabs shows all open jobs for the selected day.



4. **Filled Jobs**

The **Filled Jobs** tab is a list of all filled jobs for the selected day. You can see the scheduled substitute and location of each job.

There is an **Actions** button which allows you to **Release** the scheduled substitute from the job or **Cancel** the job altogether (<u>up to 4 hours</u> before a shift commences).

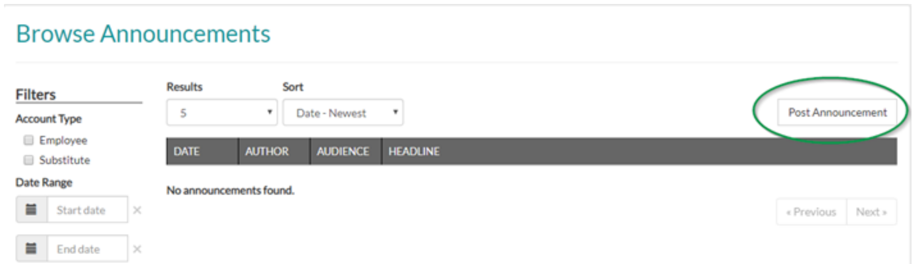
You can **Release** a substitute staff <u>up to 4 hours</u> before a shift commences. The job will then be sent out to the substitute team available and the staff will be notified that he/she are no longer required.

5. **No Substitute Required Jobs** *(module not in-use at this time)*

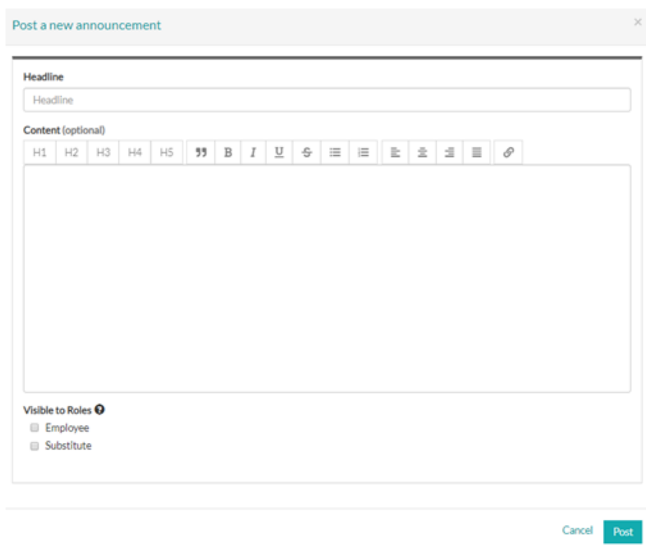
Announcements

As an Administrator, you can post announcements to your substitutes, which they will view immediately as an e-mail notification and by viewing their **Announcements** tab.

To post an announcement, hover over the **Announcements** tab and select **Post Announcement**.

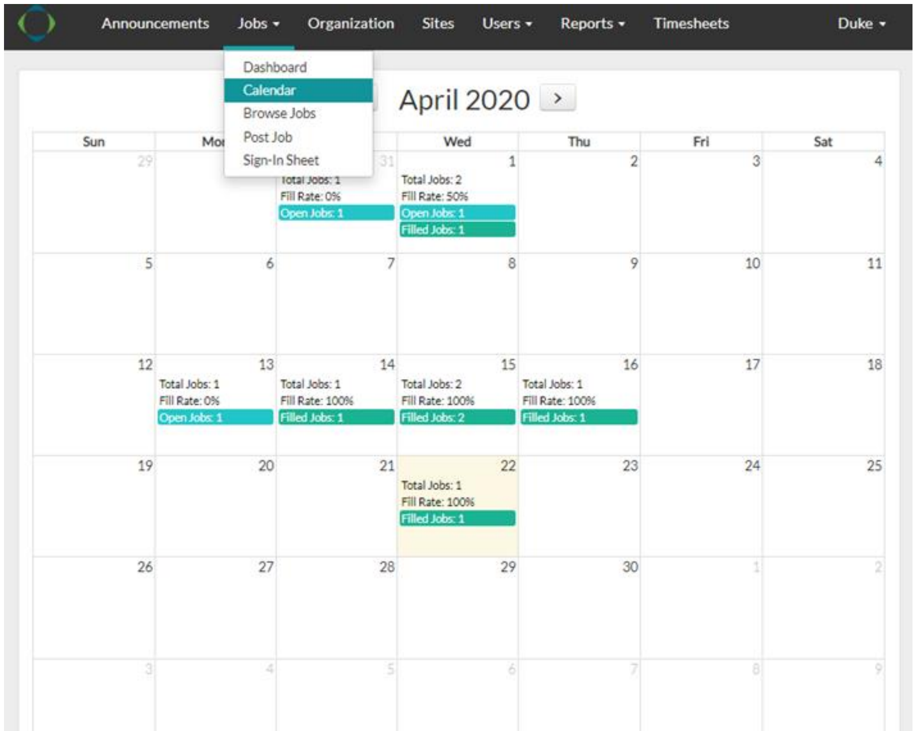


Fill out the **Headline** and **Content** of the post and select the account type(s) (**Visible to Roles**) that will receive the announcement. Once the information has been added, click **Post** at the bottom right to 'go live' with the announcement.

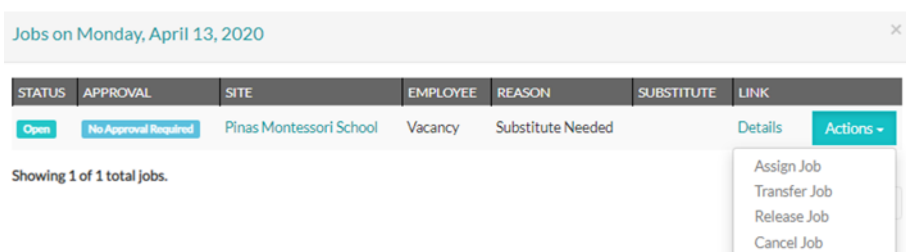


Calendar

The Sentient Connect **Calendar** – found under **Jobs** in the main navigation menu - provides a monthly view of all open and filled jobs, and those pending approval.



To view jobs for a specific day, click the corresponding **Status** (**Open, Filled, or Pending Approval**) to access a list of those jobs. From there, you can click the **Details** of a specific job for additional information.

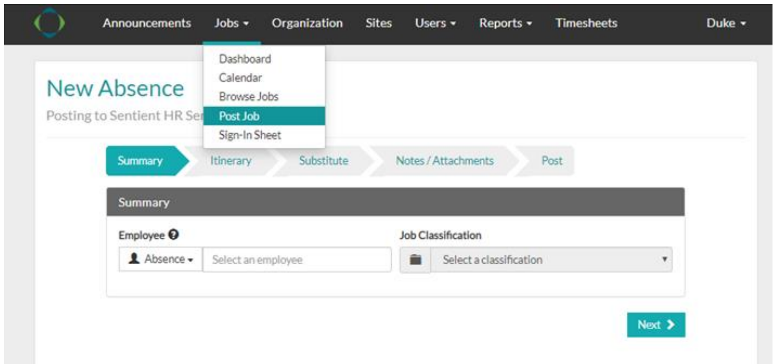


In addition to the time, date, organization, and site, you can see notes, attachments, substitute preferences and the job's history. You can also assign, release, transfer, confirm, split, edit and cancel the job from this page.

Post a Job (Absence)

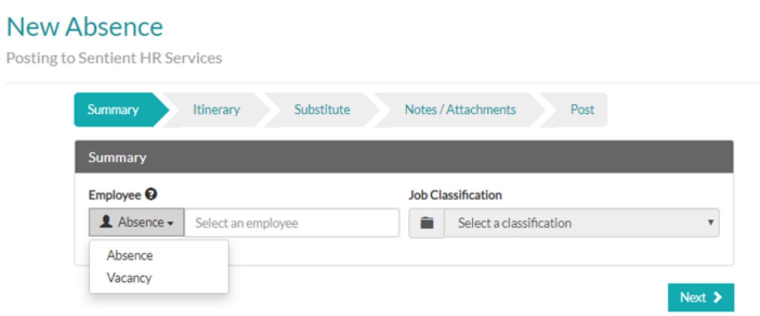
Post a Single-Day Absence

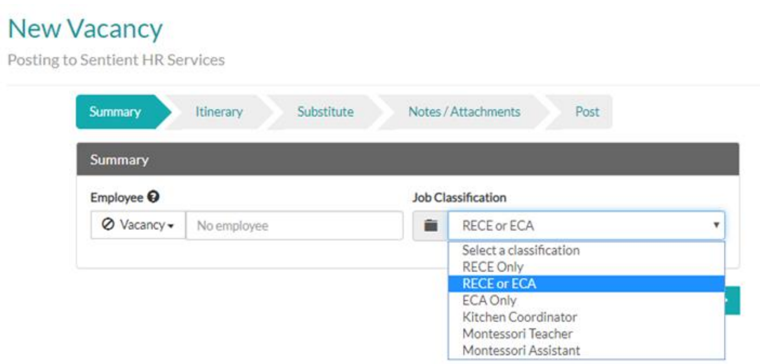
To post a new single-day absence, hover over the **Jobs** drop-down menu and select **Post Job**. Administrators can cancel jobs within four hours of a shift commencing from the **Dashboard**, **Calendar**, and **Browse Jobs** pages.



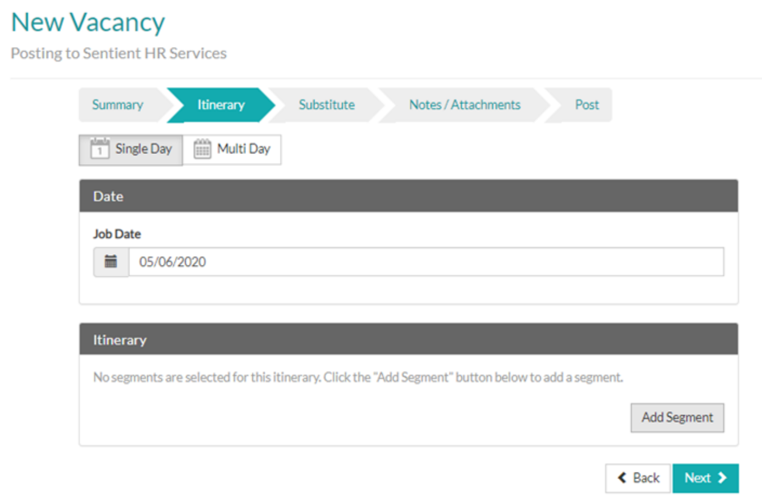
For more complex job postings, including separate substitute hours, multiple reasons, and multiple sites, see the corresponding section of this guide.

Step 1 - **Summary**: Click the arrow next to **Absence** and select **Vacancy**, then choose the **classification** of the job. Only the applicable classifications will be visible.

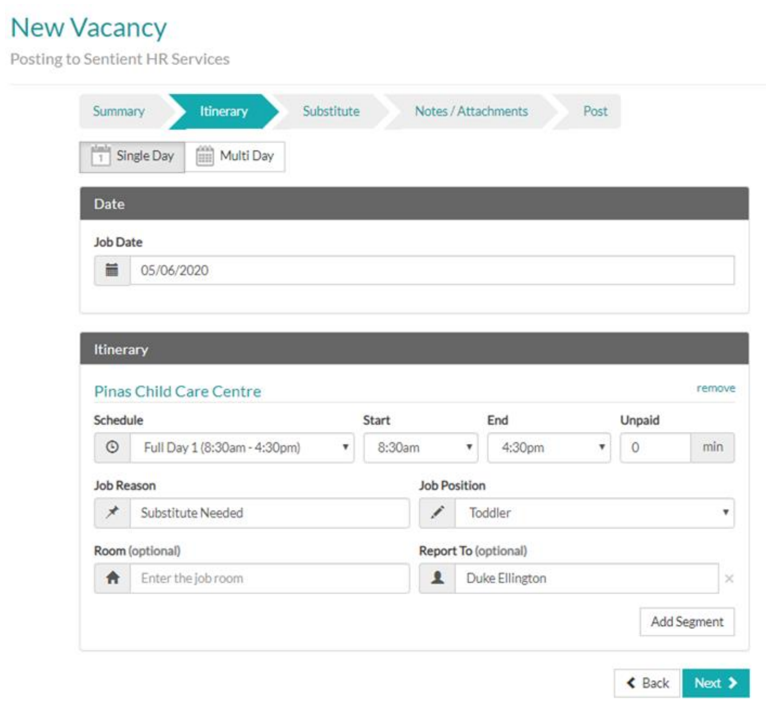




Step 2 - Itinerary: Select **Single-Day** and enter the **Job Date(s)**. In the Itinerary section, you must select **Add Segment** and select your site if you have multiple sites.



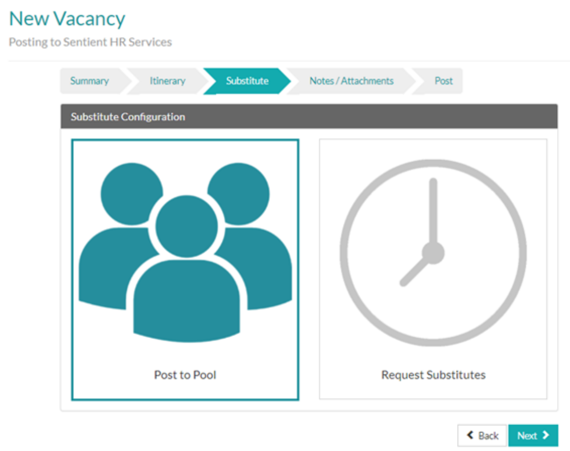
Set the schedule, start and end times, reason, position, room, and report-to person details and then click **Next**.



Step 3 - **Substitute**: There are 2 options:

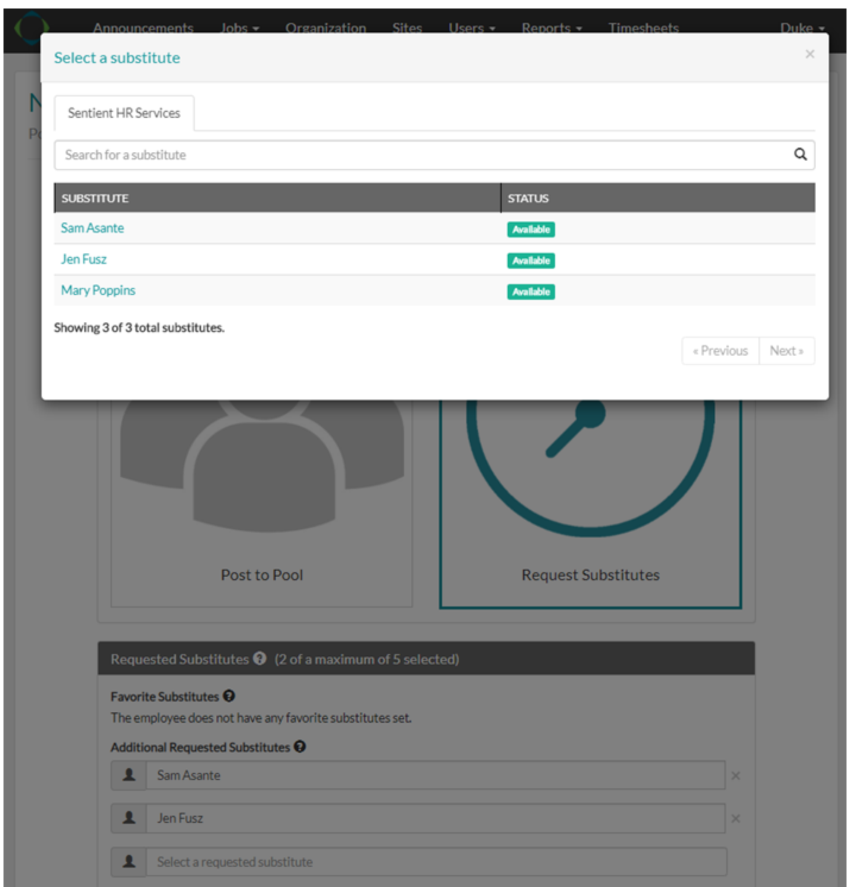
I. **Post to Pool**

Select this option to post to the pool of available/qualified substitutes, followed by the **Next** button. Posting to the Pool provides you with the best chance of filling your shift.



II. **Request Substitutes**

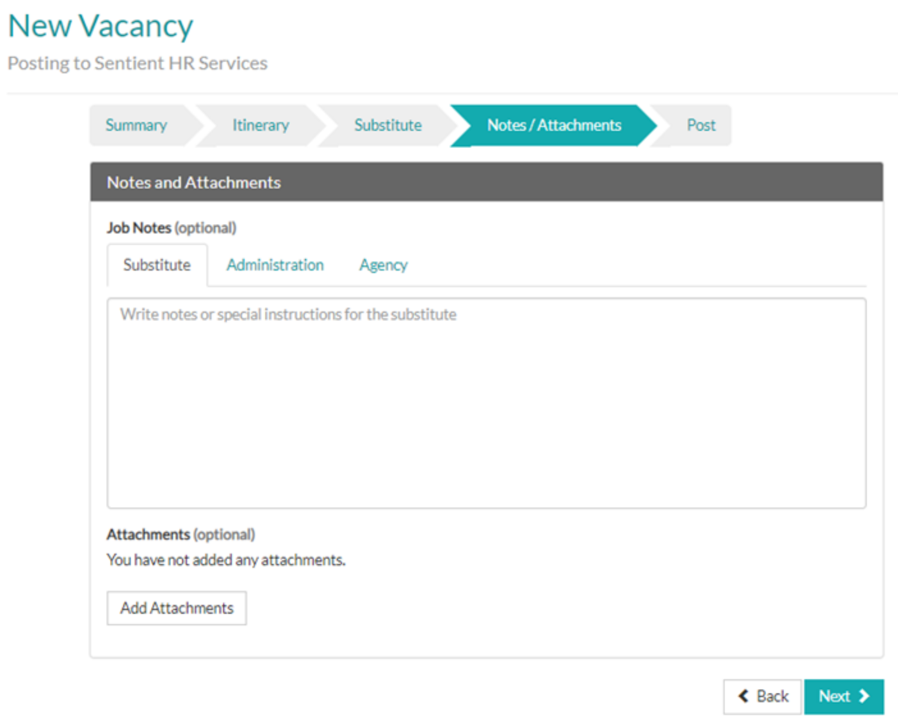
Select this option to request one or more (to a maximum of 5) of your substitute favourites.



Once you choose and submit your request(s), all requested substitutes and employee favourites will have <u>72 hours</u> from the time the job is submitted or until 8:00 p.m. the night before (whichever is sooner).

If the job is still open after the requested period has expired, Sentient Connect will automatically post the job to all qualified and available substitutes.

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



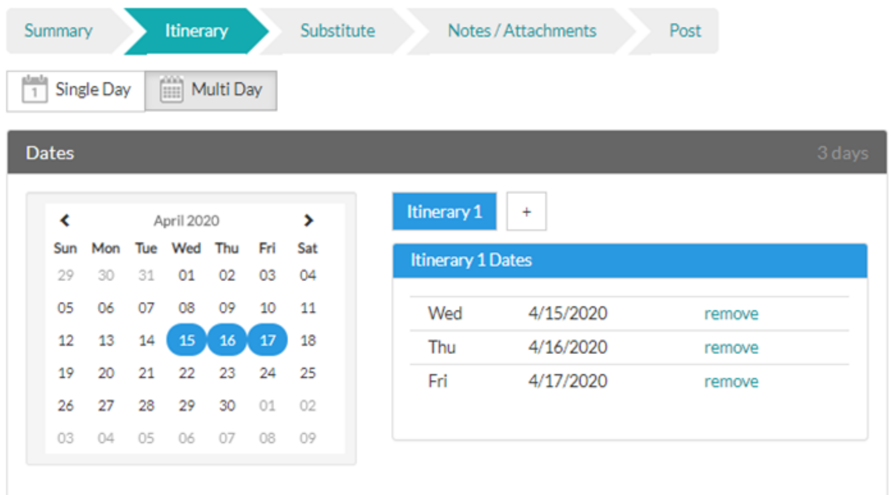
Step 5 - **Post:** Review, then click **Post Job** and you will be taken directly to the **Details** page of the newly posted job.

Post a Multi-Day Absence

To post a multi-day absence, hover over the **Jobs** drop down menu and select **Post Job**.

Step 1 - **Summary**: Click the arrow next to **Absence** and **select Vacancy**, then choose the classification of the job. Only the applicable classifications will be visible.

Step 2 - **Itinerary**: Select **Multi-Day** and select 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 or requesting up to five (5) substitutes. *See above for details.*

Step 4 - **Notes and Attachments:** Add notes to substitutes and/or administrators and attach up to five (5) files. *See above for details.*

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

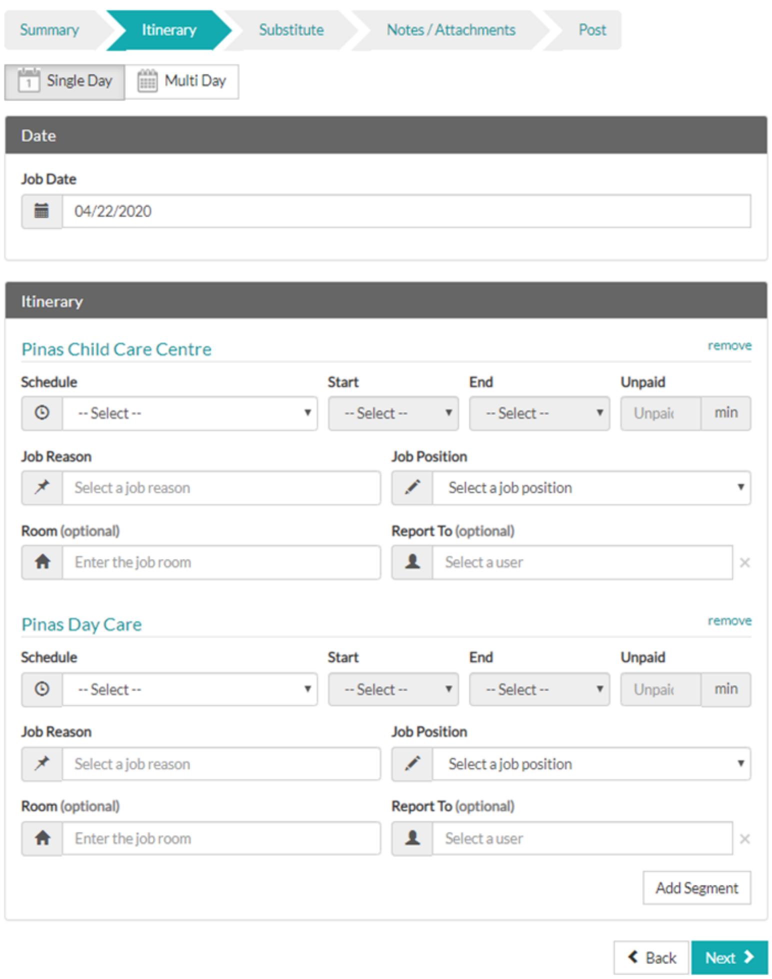
Post an Absence with Multiple Sites

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

Step 1 - **Summary**: Click the arrow next to Absence and **select Vacancy**, then choose the **classification** of the job. Only the applicable classifications will be visible.

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. Enter the leave reason, position, room, and report-to person and click Next.

The system will automatically populate your **Itinerary** tab with your sites. If you don't need one of them in your absence for any particular day, click on **remove**.



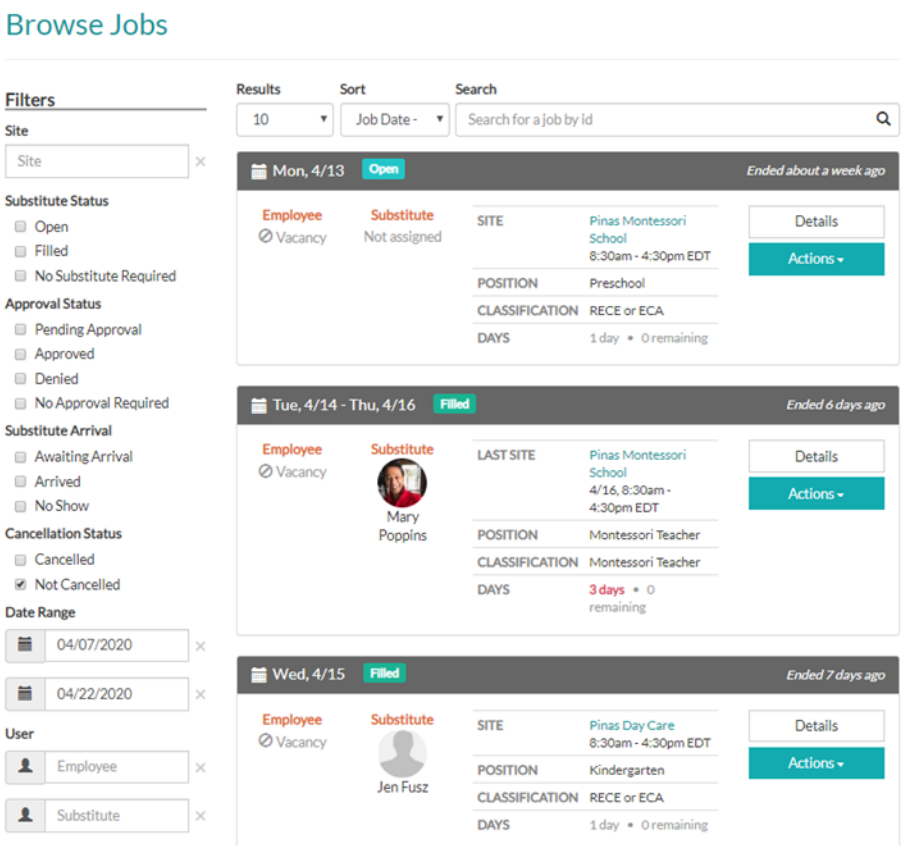
Step 3 - **Substitute**: Options include: Posting to the Pool of available/qualified substitutes or requesting up to five (5) substitutes. *See above for details.*

Step 4 - **Notes and Attachments:** Add notes to substitutes and/or administrators and attach up to five (5) files. *See above for details.*

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

Browse Open and Filled Jobs

The **Browse Jobs** page (from the main **Jobs** menu) is a chronological list of all **open and filled jobs**, and those **pending approval**. You can search for specific jobs using the filters to the left of the 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 e-mail and text of any changes to their jobs passed on their notification settings.

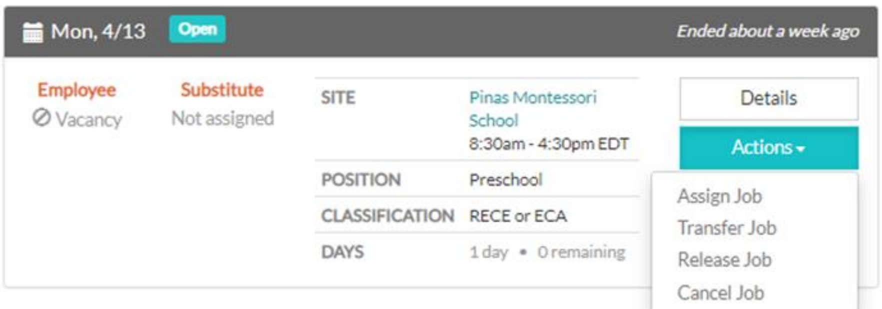
Edit a Job Post

Administrators can edit a job's schedule type, start and end times, room number, classification, or position. To make these edits, navigate to the Job's **Details** page from your Dashboard, Calendar, or Browse Jobs page.

From the **Job Details** page, select **Edit Segment** or **Edit Summary** to edit the relevant fields.

Change the Status of a Job

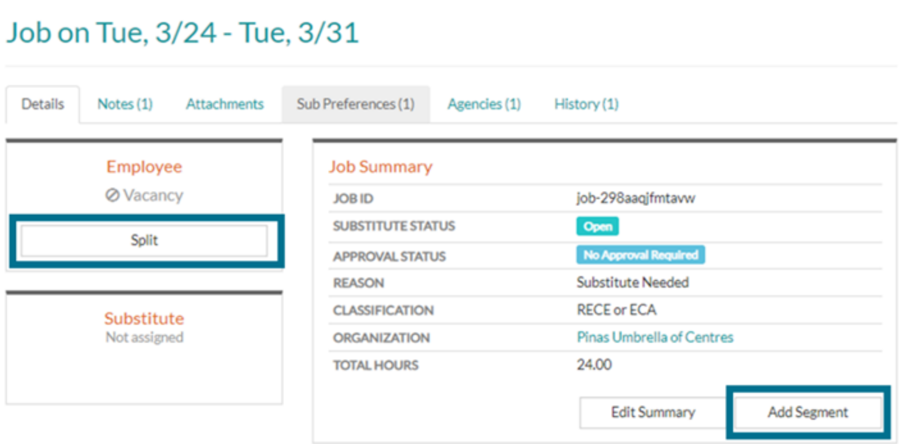
To change the status of a job, click the corresponding **Actions** button towards the right of the screen, and a drop-down menu will appear.

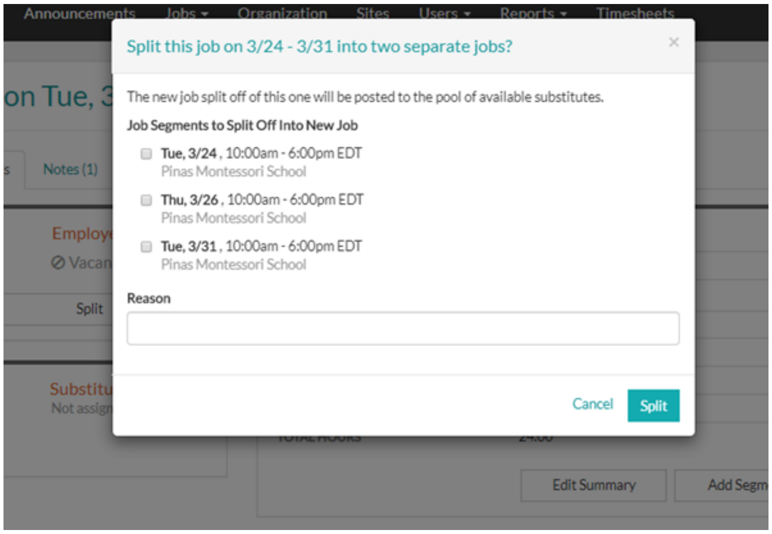


You can **Transfer** the job to another substitute, **Cancel**, or **Release** the job and Sentient Connect will send the job out to other available and qualified staff.

Split an Absence

To split an absence that already has multiple segments - Click the Split button from the Details page and select which segments you would like to split out. Once split, Sentient Connect will automatically split the segments out into their own absence.





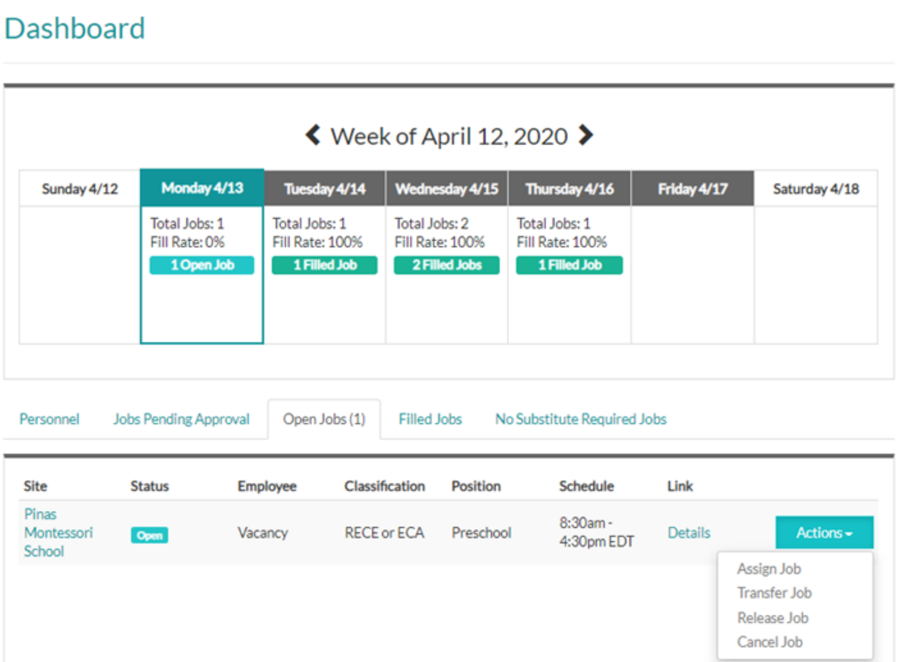
TIP: To quickly navigate between absences that have been split, you can use the Child Job and Parent Job links on the Details page of the absence.

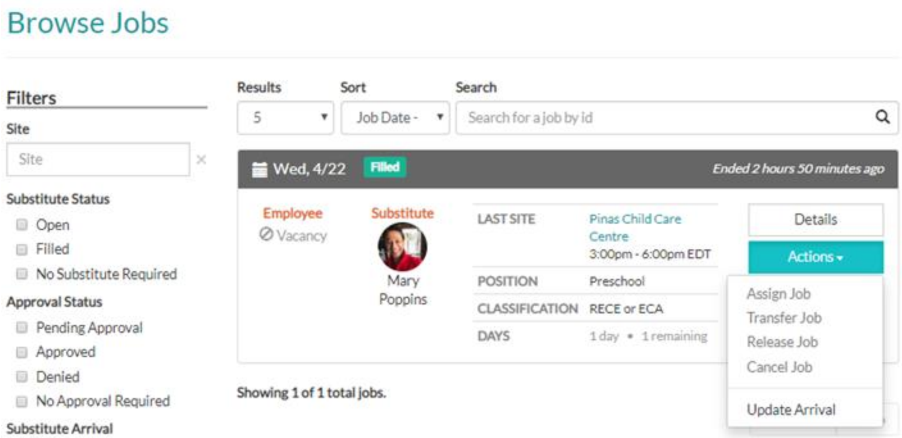
To split an absence with only one (1) segment - First you will need to add a segment to the existing absence. Make sure the new segment start/end times do not overlap with the original segment.

Release a Substitute

As an Administrator, you can release a substitute from a job prior to 4 hours before a shift via the **Dashboard**, **Calendar**, and **Browse Jobs** pages.

From the **Dashboard**, search for the job via the **Week at a Glance**. Once you have located the job, select the **Actions** drop-down menu followed by **Release Job**.



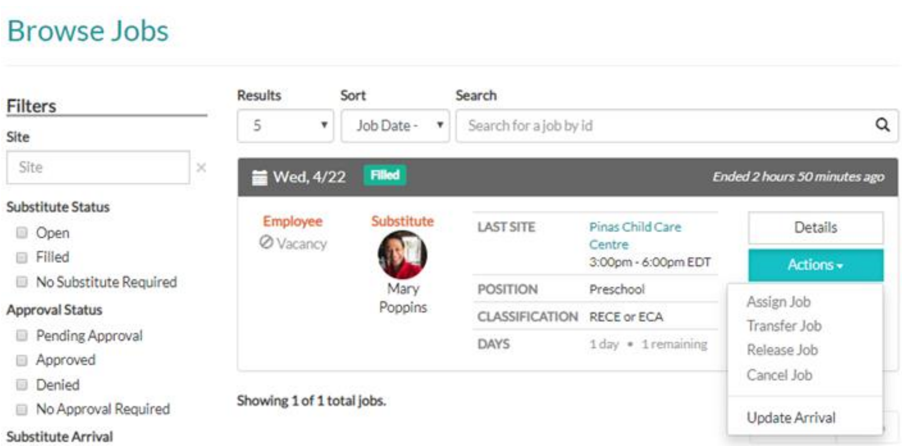


You will be prompted to confirm the release, at which point the previous substitute will be notified that he/she has been released and all other available and qualified substitutes will be notified of the new available job.

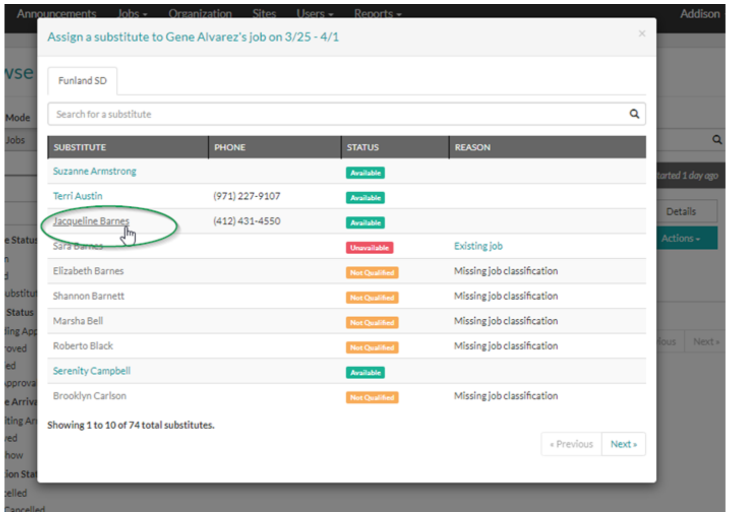
Transfer Substitutes

As an Administrator, you can transfer a job from one substitute to another prior to 4 hours before a shift via the **Dashboard**, **Calendar**, and **Browse Jobs** pages.

Search for the date of the job and click the corresponding **Filled** button. You will be prompted with a pop-up listing all the filled jobs for the day. Once you have located the job, select the **Actions** drop followed by **Transfer Job**.



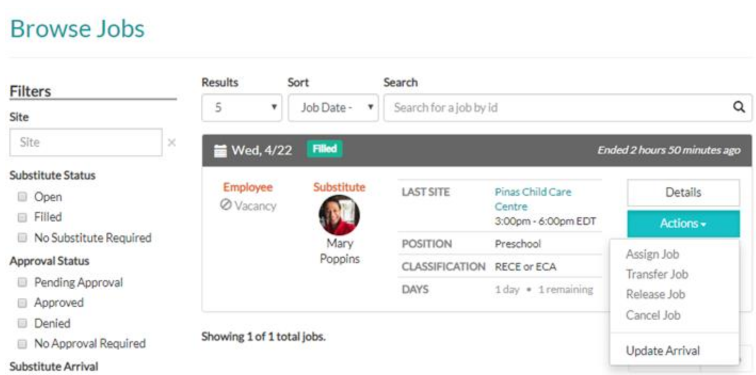
You will see a pop-up listing the available substitutes for transfer. Select your substitute followed by **Confirm** to finalize the transfer.



Once confirmed, the previous substitute will be notified of their release and the new substitute will be notified of their assignment.

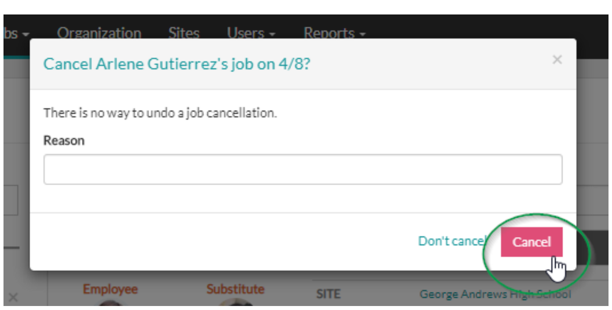
Cancel a Job

Administrators can cancel jobs <u>within four (4) hours</u> of a shift commencing from the **Dashboard**, **Calendar**, and **Browse Jobs** pages.

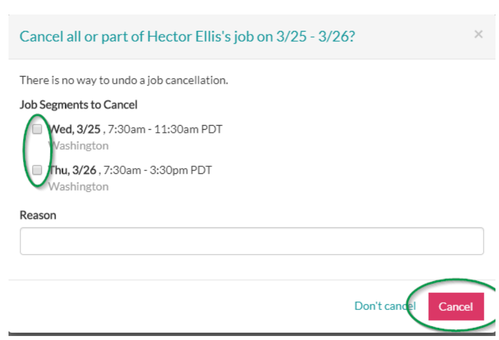


Using the **Browse Jobs** as an example, search for the job by employee and date. Once you have located the job, select the **Actions** drop-down, followed by **Cancel Job**.

The assigned substitute will receive notifications that the jobs have been cancelled.



or

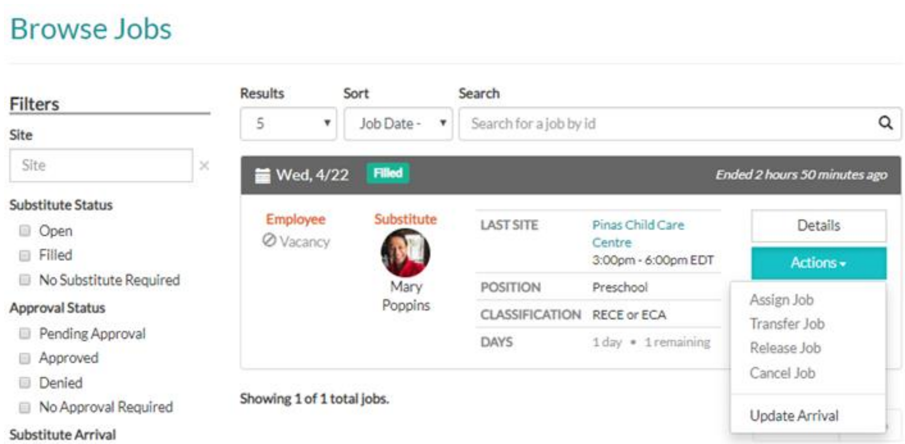


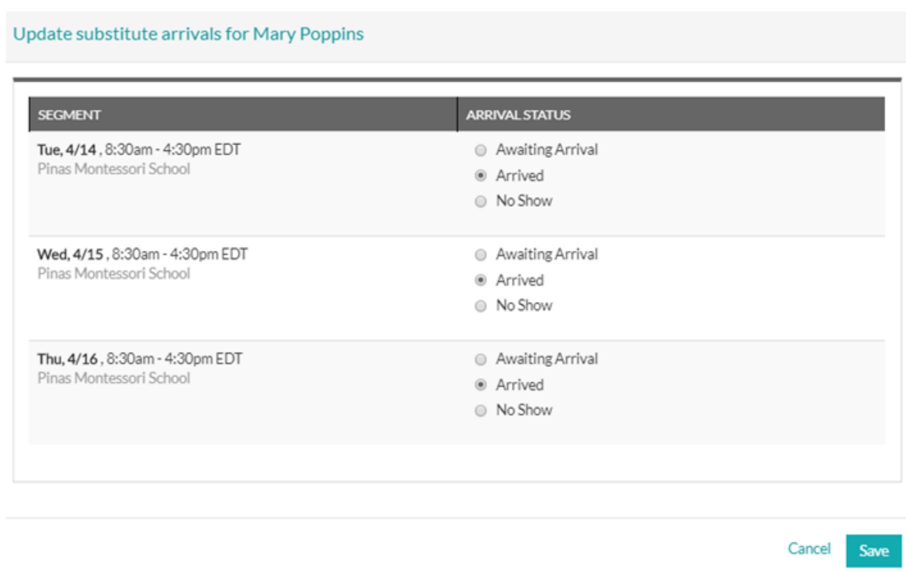
Substitute Arrival and Sign-In

Confirm Arrival

Administrators can confirm that a substitute has arrived at their scheduled job within the Sentient Connect system.

Confirm the arrival of a substitute from your **Dashboard**, **Calendar**, **Browse Jobs**, or **Job Details** pages by selecting **Update Arrival** from the **Actions** drop-down list. You can also edit the status after the job has started.



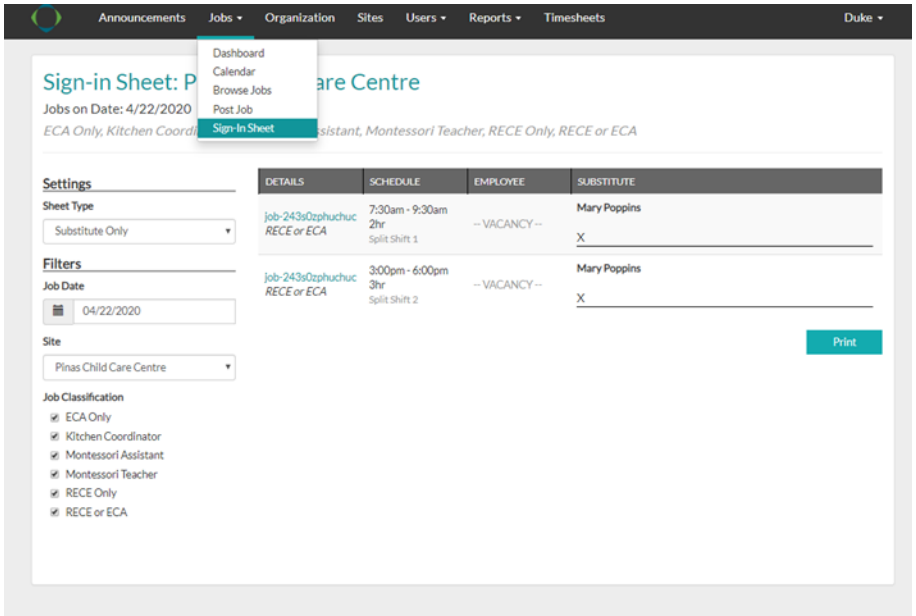


Once confirmed, the Sentient Connect system will show the job as **Confirmed** on the administrator **Dashboard**, **Browse Jobs** page, and in the **Payroll Report**.

Sign-In Sheet

Administrators can view and print daily **Sign-In Sheets** from the main **Jobs** drop-down menu to confirm substitute arrivals. Included in the sign-in sheets is the substitute name, schedule, job duration, and column for the substitute signature.

Note: You may also use the current Sentient timesheet in replacement of the Sentient Connect sign-in sheet.

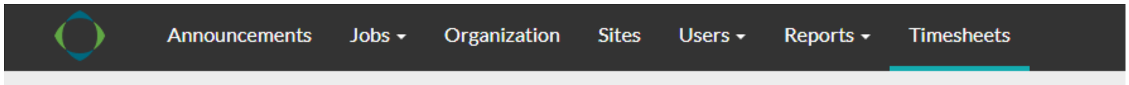


Substitute No Show

If the substitute fails to arrive for the job, you can select the **No Show** option.

Timesheets

The Timesheets link on the main navigation bar allows substitutes to submit their hours worked and administrators to reconcile them online through the platform.



Timesheet Status

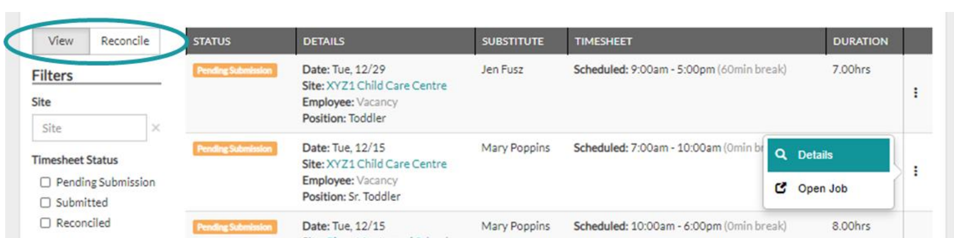
There are three types of hours within the timesheets feature:

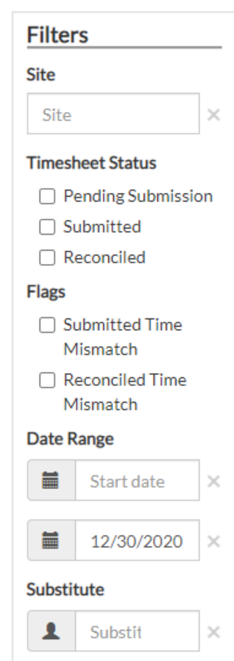
1. **Pending Submission (Orange)** – The hours the substitute is scheduled to work.
2. **Submitted (Blue)** – The actual hours the substitute worked, according to the substitute.
3. **Reconciled (Teal)** – The actual (approved) hours the substitute worked, according to the child care centre administrator. This may also be reconciled by Sentient HR administration.

In many cases, the pending, submitted, and reconciled hours are the same. When this is not the case, discrepancies are flagged by Sentient Connect for Staffing Coordinators to review. Substitutes and administrators are required to digitally sign the hours they submit and reconcile.

View / Reconcile Substitute Timesheets

STEP 1: Click the **Timesheets** link on the main navigation bar. You can see additional job **Details** by selecting the **three dots** on the right side of the time submission. Select the **View** button, on the top left, to see all timesheets.





STEP 2: Select the **Reconcile** tab to see only the timesheets that require approval. Filter to the timesheets that are pending your reconciliation by clicking the **Submitted** filter under **Timesheet Status.**

You will see a list of all timesheets within the specified date range, including:

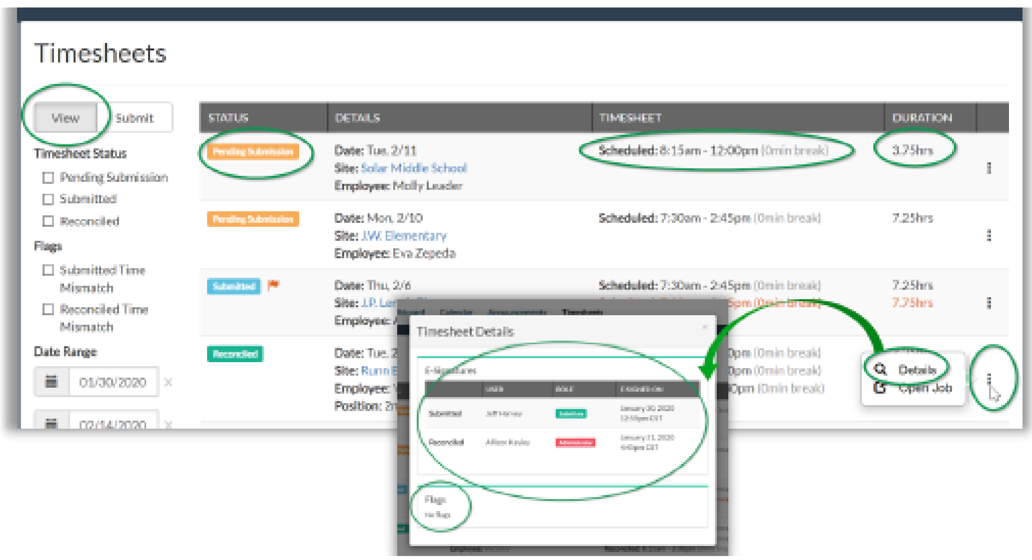
- **Status** - the timesheet status
- **Details** – date and site
- **Substitute** – name of substitute
- **Timesheet** - scheduled start/end time
- **Duration** - scheduled hours

STEP 3: Check the box next to the timesheet(s) that you would like to reconcile. You can reconcile all timesheets in the list by checking the box within the grey column header to the left of **Status**.

STEP 4: When a timesheet is selected, it will drop down to show the reconciled start time, reconciled end time, and reconciled break. The scheduled times will populate into these fields by default.

- To edit the reconciled start time or end time, click the drop-down menu.
- To edit the reconciled break, type the change into the open text _eld.
- Once changes have been made and your timesheets are ready to reconcile, click the Reconcile button

If the timesheet has already been submitted or reconciled, you will also see the submitted and/or reconciled start time, end time and hours.

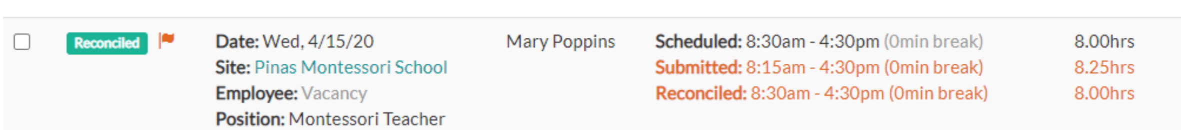


To view the history of any timesheets including e-signatures or flags, click the **three (3) dots** next to any timesheet, followed by the **Details** link.

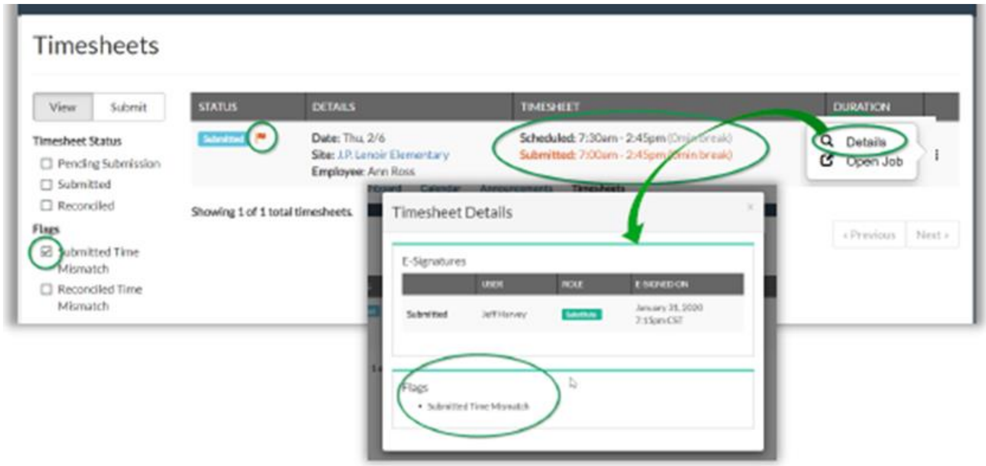
Note: You are not able to submit times on behalf of a Substitute and can only reconcile times that have been previously submitted by the Substitute.

Managing Discrepancies (Flags)

Discrepancies are marked with an orange flag indicator to indicate any discrepancies between the times scheduled, submitted by the substitute, and reconciled by you or another administrator. The mismatched start time, end time and hours will be highlighted in orange.



You can also see the flag details by clicking the three (3) dots at the right of the timesheet, followed by the Details link.



Submit Timesheets

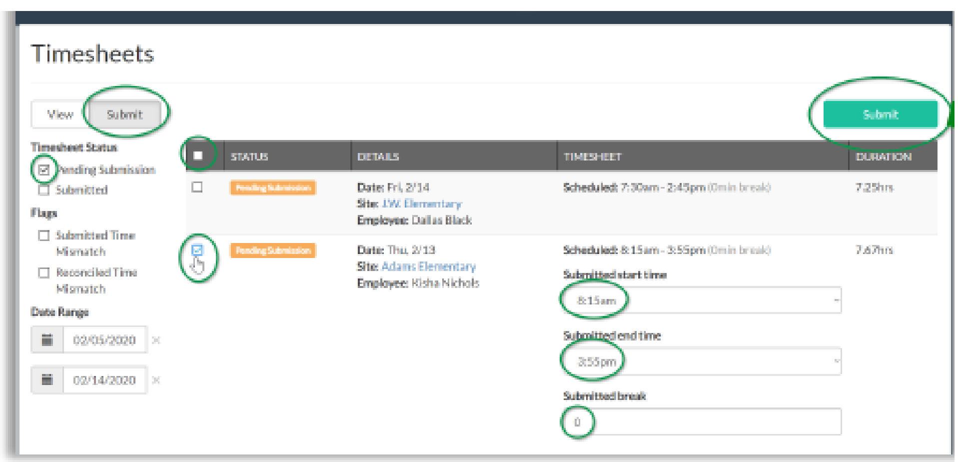
Use the **Pending Submission** filter on the left of the screen to filter down to just timesheets that are pending your submission and <u>check the box next to the timesheets</u> that you wish to submit.

TIP: You can also submit all timesheets in the list by checking the box on the gray column header next to

When a timesheet record is selected, it will drop-down to show the submitted start time, submitted end time, and submitted break. The scheduled values will populate into these fields by default.

To edit the start or end time of your shift click the drop-down to adjust the submitted start time or end time. To edit the submitted break, type the change in the open text field.

Once any necessary changes have been made and your timesheets are ready to submit, click the **Submit** button.



View Previously Submitted Timesheets

You can view previously submitted timesheets from the View or Submit tab. To edit the previously submitted timesheet, navigate to the Submit tab and locate the timesheet. Click the check box and edit the times, then resubmit. This is allowed as long as the timesheet has not yet been reconciled (approved) by the child care centre or Sentient administrator.

Once a timesheet has been reconciled by an administrator, it <u>can no longer be resubmitted</u>.

Reports

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.

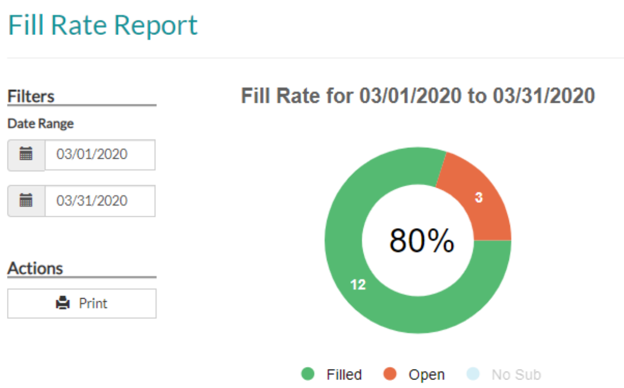
Monthly Jobs Report

Shows Open, Filled and Total Jobs for the selected month.

- Jobs 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 Daily Jobs Report to Excel, click print or save to xlsx.

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.



Supply Staff On-the-Go Package

What is an On-the-Go Package?

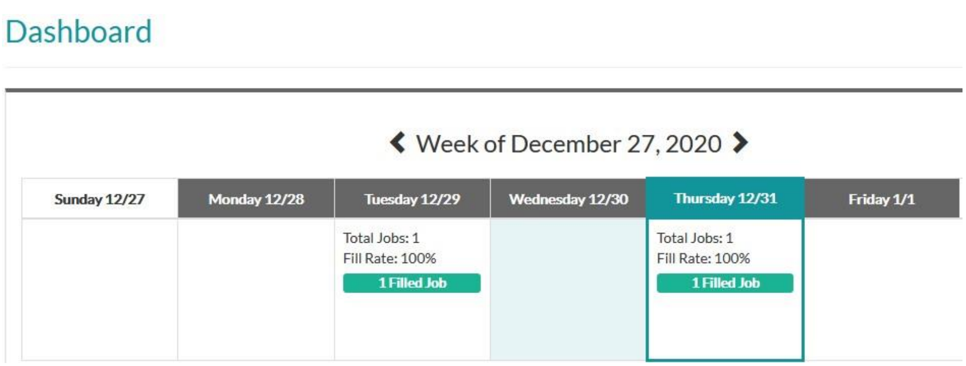
Each Supply Staff will have an On-the-Go Package with them, which includes all required documentation by the Ministry of Education.

With Sentient Connect, you can always retain digital copies of the supply staff's On-the-Go package, and documents can be requested to be e-mailed.

Vulnerable Sector Checks (VSC): Original copies of a Supply Staff's VSC are carried with them to every shift. In addition, a copy is available within their On-the-Go Package.

Accessing a Supply Staff's On-the-Go Package

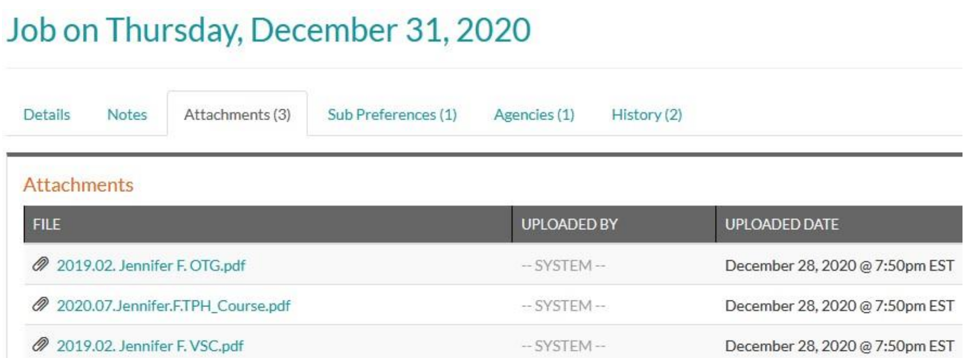
Dashboard: Starting from your Dashboard, please view the upcoming filled shifts.



Click on the Date of Interest: By highlighting the date (see above, 12/31) you will be able to view the details of that particular shift.

View Scheduled Substitutes: Below the calendar, you will find the "Personnel" tab. This tab shares with you the Scheduled Substitutes for the day.

Job Details Page: You will be brought to the Job details page. Please click on Attachments to view a supply staff's On-the-Go Package.



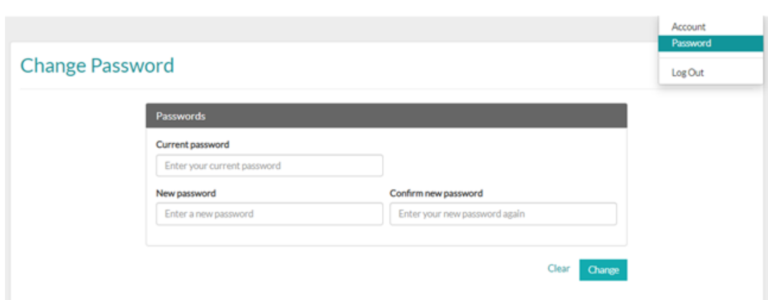
Download the Files: Please click on the file name (i.e., "2019.02.Jennifer.F.OTG.pdf") and this will initiate the download of the file to your computer.

Remember *which location on your computer file downloads are saved to, as the supply staff files will be located in that file folder or desktop location.*

Password

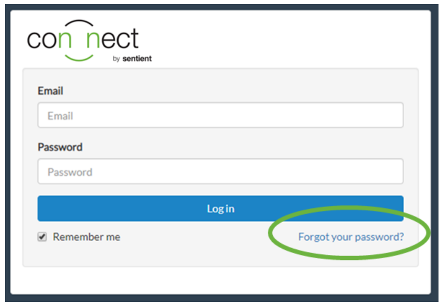
Change Password

To change your password, hover over your **Name** and select Password from the drop-down menu. Input your current password followed by your new password. Select Change to finalize the newly created password.



Forgot Password

In the event that you forget your password and need to generate a new one, go to the log-in page at http://www.sentienconnect.com and select **Forgot your password?**



You will be redirected to the Forgot Password page, where you can input your e-mail address. Upon selecting **Send Reset Link**, you will be e-mailed a link to create a new password.

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

Log Out

To log out of Sentient Connect from any page on the platform, hover over your **Name** and select Log Out from the drop-down menu. You will be taken directly out of the system and back to the login screen.