



**Automated Substitute Placement & Absence Management**  
*Selected by more districts than all other systems combined*

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## Percent Lead Time Visibility

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## Introduction

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“Percent Visibility” uses **Lead Time** as the key concept when determining when substitutes should be allowed to view jobs for which they are qualified and available. Lead Time is the difference in time between when an absence is entered and when it starts. For instance, if an absence is entered at 5 AM and it starts at 8 AM that same morning, then there are 3 hours of Lead Time.

This document will give an overview of how preference lists work as well to outline the differences between traditional day/hour visibility and the new method of “Percent Visibility”. We will also show you how to configure your district’s visibility settings quickly and easily to ensure success in your district’s fill rate.

Using the “Percent Visibility” method, the district determines the percentage of **lead time** when various groups of substitutes will have access to the assignment, based on their level of preference and skills.

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## Overview of Preference Lists

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There are four levels of “preference lists” that come into play when Aesop is trying to find a substitute for a particular absence:

- **Level 1 School Preference List** – This is the district level list. Subs are typically added to this list when they are added to Aesop. This list would hold the names of subs who can work in the district, but are not necessarily preferred.
- **Level 2 School Preference List** – These are the actual school buildings or a grouping of schools. For example, districts may choose to group their high schools together under “Mountain View Secondary Schools”. Substitutes on these lists are preferred by this specific school or school group.
- **Level 3 and Beyond** – Many districts only use Level 1 and Level 2 for their school visibility, but more levels can be set up. If you are using Level 2 for a grouping of schools then Level 3 may be the individual schools.
- **Employee Preference List** – Any substitute that the employee would list as “preferred” or “favorite five”.

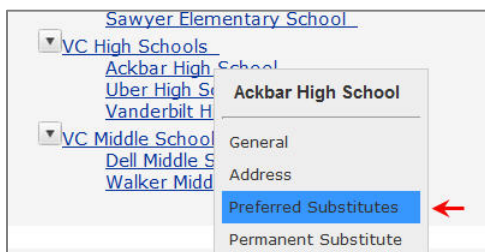
**Note:** When determining which substitute would be most preferred for the job, the system will work from the bottom up. First, the employee’s list would be called, then the school’s preferred substitutes, then the level 2 preferred substitutes, and finally the district level or “non-preferred” substitutes.

An overview of the school hierarchy can be seen below. This can be displayed by going to **Master Data>School** in the menu bar or simply by clicking the **red school house button**.

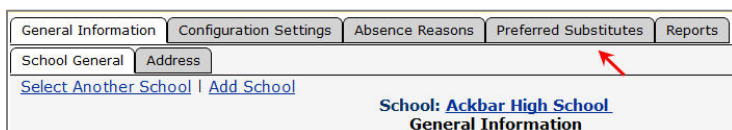
The school's "level" is indicated by the degree of indentation. The **Level 1** school in this case is "Victoria County Community Schools". A **Level 2** school would be "VC High Schools". The individual high schools would be **Level 3** schools.



Each level of school has a preference list that can be accessed by right clicking the name of the school and going to **Preferred Substitutes**.



You may also access this list by clicking on the name of the school, then clicking the gray "preferred substitutes" tab above the name of the school.



Similarly, the Employees Preferred Substitute list can be accessed by a right-click of the employee's name and selecting "preferred substitutes" from the drop down list. For more on this feature, see the chapter and guide on "School Settings".

## Configuration of a Single Preference List

Let's take a look at the different sections of a preference list.

**Calling Sequence:** Here you can determine if Aesop will call the people on the preference list in a specific call order or in random order. In almost all cases you will leave this setting as random order to give your subs a fair chance of getting called.

**Job Visibility:** When in "percent visibility" mode, the user is able to define a percentage of the lead time that the job will be visible to the substitute. This concept will be explained in more detail on the next few pages.

<b>Calling Sequence:</b> <input type="radio"/> In The Call Order Specified Below <input checked="" type="radio"/> In Random Order (Call Order is not used)	<b>Job Visibility:</b> <a href="#">Visibility Calculator</a> % Lead Time Visible: <input type="text" value="75"/> Minimum: <input type="text" value="12"/> Hours <input type="text" value="0"/> Minutes Maximum: <input type="text" value="60"/> Days <input type="text" value="0"/> Hours <input type="button" value="Apply Changes"/>
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**List Creation:** Click "Add New Substitutes" to add more subs to this list.

[Add New Substitutes](#)

Please type the first few letters.

☒ View All  
☐ View Excludes  
☐ View Includes

Click the **On List** box to select to add the sub and mark them as "included" or "excluded" as appropriate. Click "Apply Changes" for your selections to be saved.

<input type="button" value="Edit"/> <input type="button" value="Apply Changes"/> <input type="button" value="Cancel"/>												
On List	Substitute	% Lead Time Visible		Minimum Visibility		Maximum Visibility						Comments
		Exclude	Include	Default	Override	Default	# Hours	# Minutes	Default	# Days	# Hours	
<input type="button" value="All"/>												
<input type="button" value="None"/>												
<input checked="" type="checkbox"/>	<a href="#">Barrowman, George</a> (No Rating)	<input type="radio"/>	<input checked="" type="radio"/>									

**List Management:** Subs are added as “**included**” on this list if they are preferred for this location. They are added and “**excluded**” if the school does not wish to use this particular substitute.

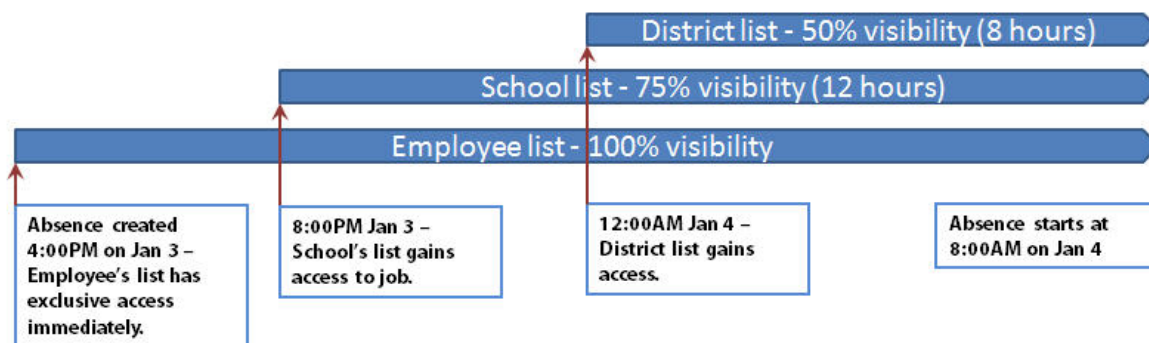
## The Concept of Percent Visibility

1. **Most Visibility** – Employee’s preferred or “favorite five” substitute.
2. **Second Most Visibility** – School’s preferred substitute.
3. **Least Visibility**– District level (non-preferred substitute)

Now let’s explore the concept of Percent Visibility as well as to show you where this can be configured quickly and easily.

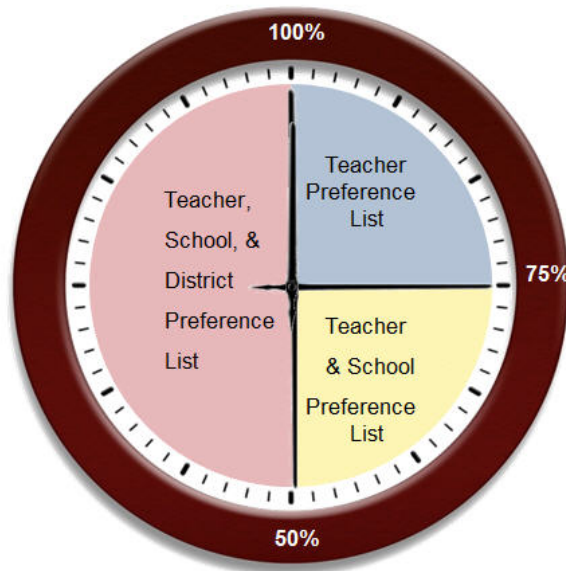
**Lead Time** is the key concept when dealing with this feature. Lead Time is calculated as the time difference between when the absence is entered and the time that the absence starts.

*Example: An employee creates an absence at 4:00 p.m. on January 3<sup>rd</sup>, and her absence starts at 8:00 a.m. on January 4<sup>th</sup>. This gives the system exactly 16 hours and 0 minutes of lead time. The percentage you assign a preference list is the percentage of the lead time you want the subs on the list to see the jobs.*



1. Employee’s list of favorite or preferred subs would have visibility for 100% of the lead time. The employee’s preferred sub would have access to the job beginning at 4:00PM on Jan 3.
2. In this example, the school’s favorite subs have been configured to see the jobs for only 75% of the lead time. 75% of 16 hours is 12 hours. School’s preferred subs would begin to have access to the job at 8:00PM, 12 hours before the absence starts.
3. District preferred subs have been configured to have access to the job for 50% of the lead time. In this case, they would begin to see the job 8 hours before it starts, or at 12:00AM on Jan 4<sup>th</sup>.

Another way to view the concept of Percent Visibility is a pie chart. The **lead time** of an absence always equals 100% of the visibility. In the example below, read the pie chart clockwise starting at the top where 100% of the visibility begins. This chart presumes you are using the default Aesop recommendations of 100% for employee preferred sub lists, 75% for the level 2 and 3 school preference lists, and 50% for the district list of subs.



The first subs that will see the job as available are the subs that are preferred by the **employee**. Employee preferred subs see jobs for 100% of the lead time.

If the job remains unfilled, the **school's** preferred subs are then able to see the job with 75% of the lead time remaining.

If the job remains unfilled with 50% of the lead time left, the general **district** list of subs then get visibility to see and accept the job.

## Lead Time Protection Values – Minimum and Maximum Visibility

The Lead Time Percentage works well for absences entered a few days before it starts. But when an absence is entered too close to the start time of an absence, or very far ahead of time, you need extra values that protect you from showing the job to too few subs or too many subs. These values are the **Minimum Visibility** and **Maximum Visibility**.

The **Minimum Visibility** protects you from holding a job too long only for preferred substitutes. For example, if an absence is entered at 6 AM on the morning that it starts, you might not want Aesop to hold that absence for employee and school preferred substitutes because the absence is just hours from starting.

**Maximum Visibility** protects you from showing jobs to less preferred substitutes too far in advance. For example, if an absence is entered 60 days ahead of time and the substitutes that are NOT preferred can see the job when it is within 50% of the start time (30 days before the absence starts), that might be too much time to expose the job to just any substitute when you have so much time to find an employee or school preferred substitute.

The place to set up these parameters is at the top of the individual preference list.

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School: [Victoria County Community Schools](#)

Substitute List

Job Visibility: [Visibility Calculator](#)

(reorder) % Lead Time Visible: 75

Minimum: 11 Hours 0 Minutes

Maximum: 30 Days 0 Hours

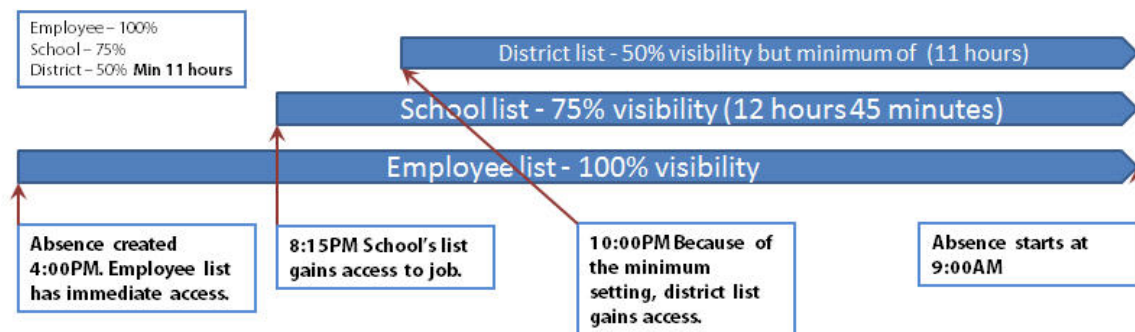
Apply Changes

The minimum visibility in the example above indicates that the visibility cannot ever be calculated to less than 11 hours. Every absence that is within 11 hours of starting will be visible to all substitutes on this list, even if the Lead Time percentage would not allow substitutes on this list to see jobs.

The maximum visibility in the above example indicates that substitutes on this list can never view jobs if they are more than 30 days from starting. Every absence that is more than 30 days from starting will not be visible to any substitutes on this list, even if the Lead Time percentage would allow substitutes on this list to see jobs.

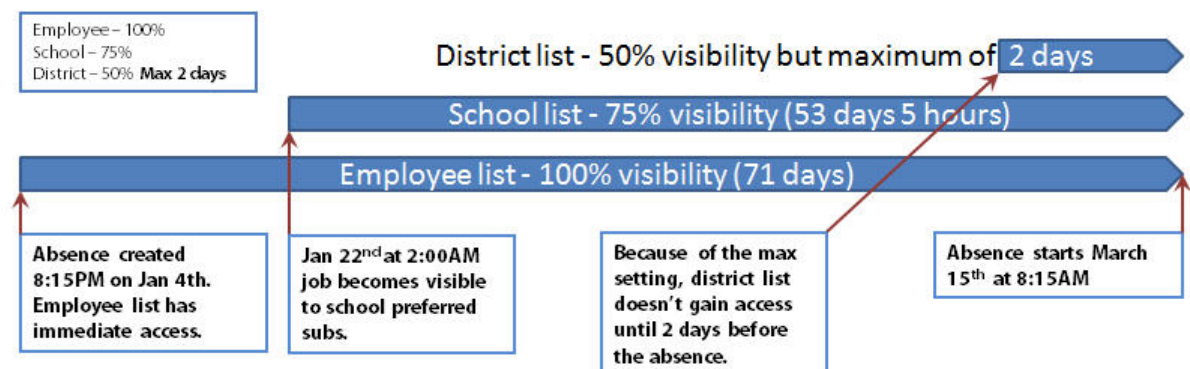
Following are examples of how Minimum and Maximum Visibility protect you:

**Last Minute Absence** - In this example, the employee enters her job at 4:00 pm, for a job that starts at 9:00 am. This gives Aesop 17 hours of lead time. The normal 50% visibility would have given the subs on the district list 8.5 hours of visibility. The minimum setting bumps this visibility up to 11 hours.



If not for the minimum setting of 11 hours the District Preference List would not gain access to the job until 12:30AM.

**Absence Entered Far in Advance** - In this example, the absence is entered on Jan 4 that does not start until March 16<sup>th</sup>. This gives Aesop 71 days of lead time.



Without the maximum setting of 2 days the district list subs would have had access to the job at 50% or about 35 days in advance.



## Visibility Settings for Your District

You have the ability to set the visibility settings for your district preference lists all at once rather than going into every preference list. If you are planning to do this *you may want to contact Aesop Client Services to make sure you are fully informed on how this will affect your district.*

To set up the visibility values go to

**Master Data > Organization Information > Set Visibility Settings**

Here you would enter the settings one line at a time and click “Apply” to save changes. So if you wanted to change the settings for all of your Level 2 schools you would only enter the data in that line and only click “Apply” for that line.

Set Default Visibility Settings						
Preferred Substitute Visibility <a href="#">Visibility Calculator</a>						
	% Lead Time Visible	Min Visibility		Max Visibility		
District List	<input type="text"/>	<input type="text"/> hrs	<input type="text"/> mins	<input type="text"/> days	<input type="text"/> hrs	<input type="button" value="Apply"/>
Level 2 School Lists	75	12 hrs	0 mins	60 days	0 hrs	<input type="button" value="Apply"/>
Level 3 School Lists	<input type="text"/>	<input type="text"/> hrs	<input type="text"/> mins	<input type="text"/> days	<input type="text"/> hrs	<input type="button" value="Apply"/>
Employee Lists	<input type="text"/>	<input type="text"/> hrs	<input type="text"/> mins	<input type="text"/> days	<input type="text"/> hrs	<input type="button" value="Apply"/>

Enter the data one line at a time and click "Apply" to save

This will overwrite the visibility settings already in the individual preference lists.

Here are some recommended settings:

Standard Visibility	Employee	School	District
Percent	100	75	50
Min	0 days	12 hours	11 hours
Max	120 days	60 days	30 days

Confident Visibility	Employee	School	District
Percent	100	60	40
Min	0 days	12 hours	11 hours
Max	120 days	60 days	30 days

"Safe" Visibility	Employee	School	District
Percent	100	90	80
Min	0 days	12 hours	11 hours
Max	120 days	60 days	30 days

## Skill Matching and Lead Time Visibility

When you decide to use the Percent Visibility, this also applies to skill matching. Specifically, this applies when you use the concept of a “should have” skill. “Should Have” skills are skills that you would like a substitute to have to qualify for an absence but do not require.

To get to your list of skills go to **Reference Data > Skills**

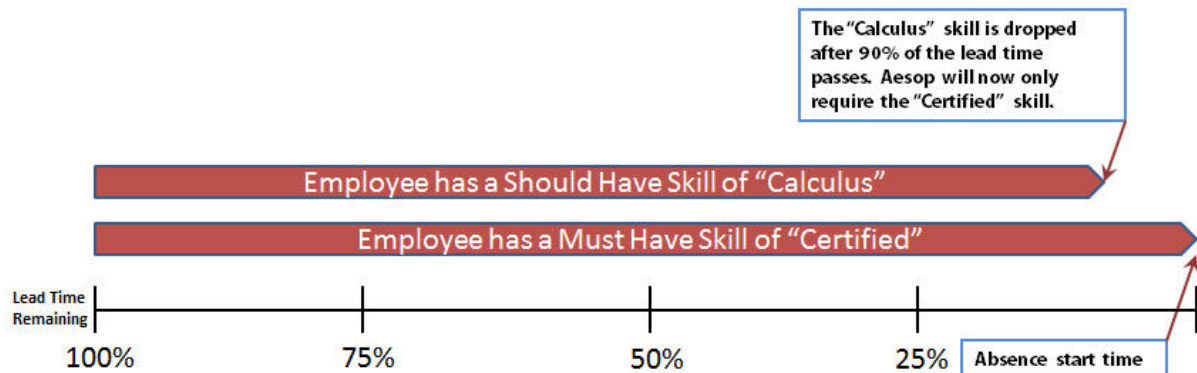
On the right side of the skills page you will see a place to enter a “Percentage of Lead Time Enforced” and some boundary times. These columns only apply if the skill is a **Should Have Skill**. If the skill is a Must Have Skill these columns will not apply and the skill will be required 100% of the lead time.

Skills								
Skill Code	Description	External ID	% Lead Time Enforced	Short Lead Time Boundary Hours	Short Lead Time Boundary Mins	Long Lead Time Boundary Days	Long Lead Time Boundary Hours	
+								
Aide	Aide	Para	10	12	0	3	0	
Calculus	Calculus	Math300	20	1	10	1	6	
Nurse	Nurse		10	12	0	3	0	
PE	Physical Education		10	12	0	3	0	
Spanish	Spanish	SPA	20	0	20	0	5	
Special Ed	Special Education		10	12	0	3	0	
Teacher	Teacher		10	12	0	3	0	

**% Lead Time Enforced** – This is the percentage of time that the skill is required for the job if listed as a “should have” instead of a “must have. A % lead time of 90% would indicate that the system would not accept a sub without that skill unless 90% of the lead time had expired, letting lesser qualified subs see the job only during the last 10% of the lead time. A skill of 10% would be enforced for less time. This would mean that the system would hold the skill for only 10% of the lead time and then would release it to subs without that skill for the remaining 90% of the lead time.

### Should Have Skill with High Importance

Below is an example of when an employee would always require (Must Have) a "Teacher" substitute, but it is desired (Should Have) that Aesop try for a substitute with a skill of "Calculus" for most of the time the absence exists.



### Should Have Skill with Low Importance

Below is an example of when an employee would always require (Must Have) a "Teacher" substitute, but it is desired (Should Have) that Aesop try for a substitute with a skill of "Spanish Speaking" for a small amount of the absence lead time.



## Recommended Skill Settings

The skills that are more important will need to be enforced for a longer period of time. In the above examples, a skill of “Certified” is a rather basic skill that many subs have and, therefore, you are able to safely enforce it for a longer period of time.

More Important Skill (Like the “Certified Skill” in the above example)

Skill Code			Description	% Lead Time Enforced	Short Lead Time Boundary Hours	Short Lead Time Boundary Mins	Long Lead Time Boundary Days	Long Lead Time Boundary Hours
✓	✗	Certified	Certified Teacher	90	3	0	3	0

- 90% lead time enforced
- **Short Lead Time Boundary** – 3 hours – If the job starts in 3 hours or less, it will open up to subs who do not have the skill 3 hours before the job starts. (Used for jobs that are entered at the last minute.)
- **Long Lead Time Boundary** – 3 days – The job would not release to subs missing this skill any more than 3 days in advance (if 90% of the lead time would be greater than 3 days). This would mean that absences entered more than 30 days in advance would be not be visible to subs lacking the skill until 3 days in advance of the job starting.

If this skill is a “nice to have”, less important skill, or you don’t have many subs with this skill, configure the skill to be enforced for a shorter period of time.

Less Important Skill (Like the “Spanish Speaking” skill in the above example)

Skill Code			Description	% Lead Time Enforced	Short Lead Time Boundary Hours	Short Lead Time Boundary Mins	Long Lead Time Boundary Days	Long Lead Time Boundary Hours
✓	✗	Spanish	Spanish	10	2	0	10	0

- 10% lead time enforced
- **Short Lead Time Boundary** – 2 days – If the job starts in less than 2 days, start showing it to subs who do not have the skill.
- **Long Lead Time Boundary** – 10 days - The job would not release to subs missing this skill any more than 10 days in advance ( if 90% of the lead time would be greater than 10 days). This would mean that absences entered more than 10 days in advance would be not be visible to subs lacking the skill until 10 days in advance of the job starting.

## Graduated Skills

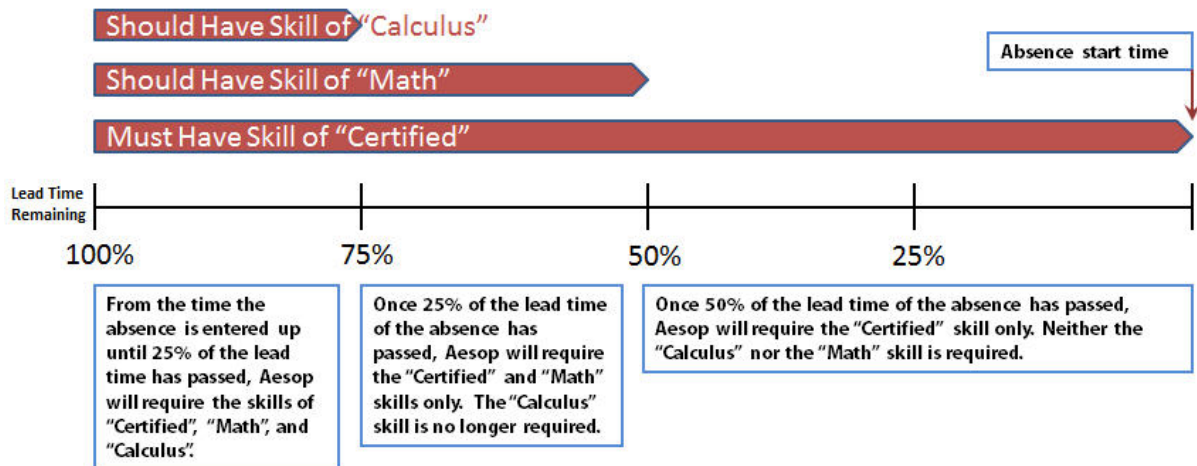
When you want to find substitutes using 3 or more skills, you can “graduate” them. Below is an example of an employee where it is required that the substitute be a “Certified” substitute. There are 2 more skills, “Math” and “Calculus” that Aesop is told to use to find subs with those qualifications.

For the purpose of this example the employee would be given three separate skills.

Certified – Must have skill that is enforced 100% of the lead time.

Math – Should have skill that with a setting of 50% Lead Time Enforced.

Calculus – Should have skill with a setting of 25% Lead Time Enforced.



## How Skills and Preference Lists Work Together

The following chart shows an example of how the visibility of an absence is released to substitutes across the district, school, and employee preference lists and how graduated skills may intersect with these lists. As lead time expires, the absence will be able to be viewed by more and more subs as less skills are required. Simultaneously, as lead time expires, more and more subs will be able to see this job as it is released to the school and district preference lists.

