Aesop® Substitute Placement & Absence Management

Web Navigator User Manual

Skill Matching

Summary

Skill matching is how Aesop decides which substitutes should be allowed to replace a specific employee. When a teacher is absent, Aesop checks to see if there are any characteristics or skills that a substitute must have, should have, or must not have, in order to replace the absent employee. Because it is Skill Matching, certain characteristics or skills must be assigned to both employees and substitutes. Skills can also be used as a tool to track certification expiration, and management of other data attached to an Employee or Sub.

Things to Consider

- Do you have different types of employees (i.e. teachers, aides)?

- Do these different types of employees require a specific kind of sub? In other words, do Aides require Aide subs and do Teachers require Teacher subs?

- Do you have gender-specific positions (i.e. locker room duty)?

- Would you like to allow subs with specific skills (i.e. Speaks Spanish, has a Math degree) to be able to see jobs further in advance than other subs?
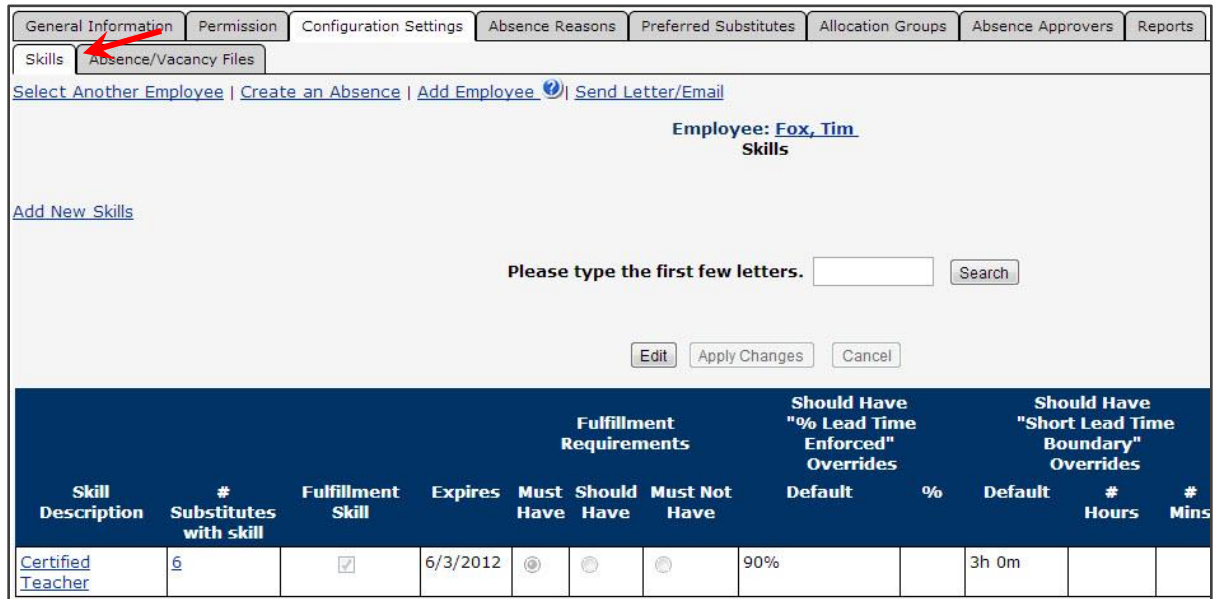
How Does Skill Matching Work?

When employee Joe Smith creates an absence, he requires that a teacher sub fill in for him. Let's say that we have assigned a skill called "Teacher" to Joe. When Joe enters an absence, Aesop will look for any sub that has the "Teacher" skill. To the right are 3 subs. Aesop will let Nancy see the job. John Doe will not see the job; he does not have the "Teacher" skill. Amy has 2 skills, but as long as she has the necessary "Teacher" skill, Amy will be able to see Joe Smith's absence. Amy's "Aide" skill will not block her from seeing "Teacher" openings.

Setting up Skill Matching
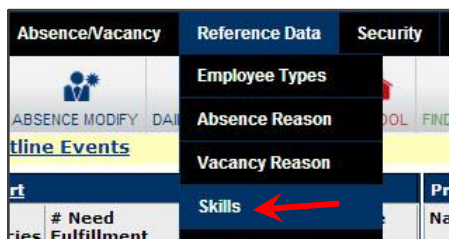
In order to use Skill Matching, you will first need to add the skills you want to use as 'qualifying' characteristics when matching substitute to absences or vacancies in Aesop. Go to **_Reference Data > Skills_**.

Below is a sample of what your "Skills" table may look like with a few skills filled in. Note that this display only shows the left two columns of the "Skills" table. We will discuss the other columns later in this chapter.

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	Notify Employees of Expiration	Notify Substitutes of Expiration
								☐	☐
Aide	Aide	Para	10	12	0	3	0	☐	☐
Calculus	Calculus	Math300	20	1	10	1	6	☐	☐
Certified	Certified Teacher	CERT	90	3	0	3	0	☑	☑
Espagnol	Espagnol	ESP	1	0	0	0	0	☐	☐
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	☐	☐

Should Have Skill Calculator

1 **Skill Code:** This is a code which will be used when assigning skills to your employees and substitutes through Aesop Data Loads. Recommendation: The simpler, the better.

2 **Description:** This is how the skill will show on reports and displays in Aesop. Aesop's recommendation: Make the description a term that will make sense to you.

3 **Add:** To add a skill, click on the sign. Enter Skill Code, Description, and all numeric values in the far right columns (to be covered later.)

4 **Edit:** To edit an existing entry, click the icon. Make any necessary changes and then click the green check mark to save changes.

5 **Delete:** To delete an existing skill, click the trash can icon. If you delete an existing skill, this skill will be deleted from every employee, substitute, and vacancy profile where the skill is currently listed.

6 **% Lead Time Enforced:** The lead time columns allow you to specify the should-have skill's lead time value as well as the short and long term lead time values.

Adding Skills to an Employee's Profile

Skills can be added to employee profiles in two ways: Manual entry and Data Import. Following is an example of how to do a manual entry. To learn more on how to load skills via Aesop's Data Load feature, please consult the Skill Import Guide document at *Help >Training and Reference Materials* on your Aesop Navigator page. It can be found under "Navigator Topical Guides" on the left hand side of your screen.

To manually add a skill to an employee's profile, go to an employee's "General Information" page. Once there, click on the "Configuration Settings" tab. Aesop will then display the "Skills" sub-tab.

Pro Tip: You can also access an employee's skills page by right clicking the employee's name. A drop-down box will appear with a number of options, including "Skills."

You can access many other parts of an employee's Aesop profile by using this right-click feature.
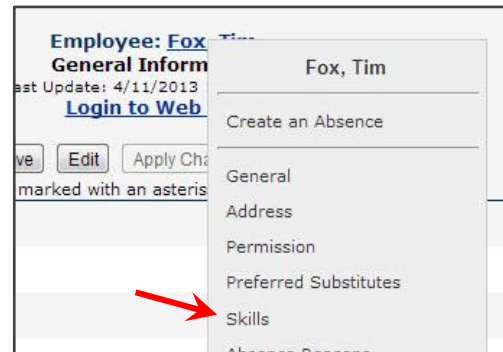
To add skills, click the blue Add New Skills link on the left hand side of the screen. When you click this link, you will be given a list of the skills not already assigned to this employee.

For this example we will give the employee the "Spanish" skill. To do this, check the box for Spanish in the Fulfillment Skill column. Also make sure that the "Must Have" radio button is marked. Then click the *Apply Changes* button to save.

Skill Description	# Substitutes with skill	Fulfillment Skill	Expires	Fulfillment Requirements			Should Have "% Lead Time Enforced" Overrides		Should Have "Short Lead Time Boundary" Overrides			Should Have "Long Lead Time Boundary" Overrides		
				Must Have	Should Have	Must Not Have	Default	%	Default	# Hours	# Mins	Default	# Days	# Hours
Aide	4	☐	📅	◉	○	○	10%		12h 0m			3d 0h		
Calculus	0	☐	📅	◉	○	○	20%		1h 10m			1d 6h		
Espagnol	2	☐	📅	◉	○	○	1%		0h 0m			0d 0h		
Nurse	1	☐	📅	◉	○	○	10%		12h 0m			3d 0h		
Physical Education	1	☐	📅	◉	○	○	10%		12h 0m			3d 0h		
Spanish	0	☐	📅	◉	○	○	20%		0h 20m			0d 5h		
Special Education	2	☐	📅	◉	○	○	10%		12h 0m			3d 0h		

Edit Apply Changes Cancel

Once you click Apply Changes Aesop will bring you back to the employee's skills page where you can view their current skills.

Skill Description	# Substitutes with skill	Fulfillment Skill	Expires	Fulfillment Requirements			Should Have "% Lead Time Enforced" Overrides		Should Have "Short Lead Time Boundary" Overrides			Should Have "Long Lead Time Boundary" Overrides		
				Must Have	Should Have	Must Not Have	Default	%	Default	# Hours	# Mins	Default	# Days	# Hours
Spanish	0	☐	📅	◉	○	○	20%		0h 20m			0d 5h		

Above, you will see that this employee has a "Spanish" skill assigned to him, guaranteeing that Aesop will never offer any of his absences to any substitute that does not also have the "Spanish" skill assigned to them.

Take notice that there are three different categories of skills; there are "Must Have" skills, "Should Have" skills, and "Must Not Have" skills.

Must Have: Any substitute who wants to replace the employee absolutely musthave the "skill" assigned to his/her record.

Should Have: The substitute who replaces the employee should have the "skill" on his/her record. This particular skill will expire at a point in time, allowing substitutes without the "Should Have" skill to see this employee's absences. We will discuss more about the "should have" function shortly.

Must Not Have: Any substitute who wants to replace this employee must not have the "skill" assigned to his/her record. For instance, if you use skills of "male" and "female" for gender-specific positions, you may assign a "Must Not Have" skill of "Female" to a male employee, so that no substitutes with the "Female" skill will ever see this employee's absences.

When to Use "Should Have" Skills

"Should Have" skills enable you to be more precise about which substitutes can see certain absences. In this example, I'm telling Aesop that I want to only allow "Certified Teacher" substitutes to see this employee's absences, but I also want Aesop to consider "Spanish" qualified substitutes first. When I assign the "Should Have" skill of "Spanish", I'm telling Aesop to only show the absence to substitutes that ALSO have the "Spanish" skill, but at a certain point in time Aesop will drop the "Spanish" skill if the absence doesn't get filled after a predetermined amount of time.

Skill Description	# Substitutes with skill	Fulfillment Skill	Expires	Fulfillment Requirements			Should Have "% Lead Time Enforced" Overrides		Should Have "Short Lead Time Boundary" Overrides			Should Have "Long Lead Time Boundary" Overrides		
				Must Have	Should Have	Must Not Have	Default	%	Default	# Hours	# Mins	Default	# Days	# Hours
Certified Teacher	6	☑	6/3/2012	⦿	○	○	100%		3h 0m			3d 0h		
Spanish	0	☑		⦿	○	○	25%		0h 20m			0d 5h		

Edit | Apply Changes | Cancel

Think of "Should Have" skills as your wish list. I NEED to have a Teacher substitute, but I WISH the sub was also skilled in Spanish. The amount of time that Aesop will reserve for finding a Teacher sub that also has a skill of Spanish is determined by the "Lead Time" settings for the skill. These settings are located on each skill at *Reference Data >Skills*.

Note: The following "Lead Time" and "Boundary" settings only affect skills when selected as "Should Have". "Must Have" and "Must Not Have" skills do not ever use these values.

Understanding Lead Time Settings

		Skill Code		% Lead Time Enforced	Short Lead Time Boundary Hours	Short Lead Time Boundary Mins	Long Lead Time Boundary Days	Long Lead Time Boundary Hours	Notify Employees of Expiration	Notify Substitutes of Expiration
✏ 🗑	Spanish	Spa		25	0	25	0	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". In other words, a % lead time of 25% would indicate that the system would not accept a sub without that skill unless 25% of the lead time had expired. 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 rather quickly.

Short Lead Time Boundary (hours/minutes): if the job starts in 48 hours or less, it will open up to subs without the skill 48 hour before the job starts. (used for jobs that are entered at the last minute)

Long Lead Time Boundary (days/hours): the job would not release to subs missing this skill any more than 10 days in advance (if 25% of the lead time would be greater than 10 days). For example, this would mean that absences entered 40 days in advance, which would normally be visible to subs WITHOUT the "Should Have" skill 30 days out, would be not be visible to subs lacking the skill until 10 days in advance of the job starting.

Note: Go to the end of this chapter to see examples of Should Have Skills and Lead Times in action.

Adding Skills to a Substitute's Profile

Skills can be added to substitute profiles in two ways: Manual entry and Data Import. Following is an example of how to do a manual entry. To learn more on how to load skills via Aesop's Data Import feature, please consult the "Skills Import Guide" document at **Help >Training and Reference Materials** on your Aesop Navigator page. It can be found under "Navigator Topical Guides" on the left hand side of your screen.
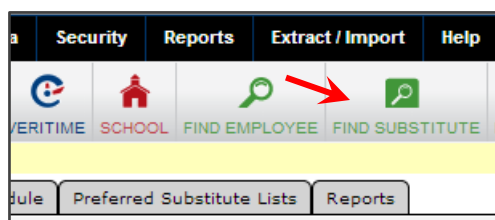
First head over to the sub's General Information page by clicking the "Find Substitute" button and searching for the substitute to whom you would like to add skills.

General Information	Permissions	Configuration Settings	Schedule	Preferred Substitute Lists	Reports

Skills | Preferred Schools

Select Another Substitute| Add a Substitute ⑦ | Send Letter/Email

Substitute: Baker, Tom ⭐⭐⭐⭐⭐
Skills

Add New Skills

Updates Successful.

[Edit] [Apply Changes] [Cancel]

Skill Description	Skill Expiration	Substitute Has Skill
Certified Teacher		☑

[Edit] [Apply Changes] [Cancel]

Once you have navigated to the substitute's General Information page, click on the "Configuration Settings" tab. Aesop will automatically show you the "Skills" sub-tab.

To add skills, click the blue Add New Skills link to the left hand side of the screen. When you click on this link, you will be given a list of the skills not already assigned to this substitute.

[Edit] [Apply Changes] [Cancel]

Skill Description	Skill Expiration	Substitute Has Skill
Aide	[ ] 📅	☐
Calculus	[ ] 📅	☐
Espagnol	[ ] 📅	☐
Nurse	[ ] 📅	☐
Physical Education	[ ] 📅	☐
Spanish	[ ] 📅	☑
Special Education	[ ] 📅	☐

[Edit] [Apply Changes] [Cancel]

Skill Expiration: You can enter expiration dates for skills. If you enter an expiration date, and the expiration date passes for that skill, then the substitute would no longer qualify for absences where the employee's absence requires that skill.

Select Skill: Check the box(es) for any skills that this Substitute has. In this example, "Spanish" is selected, allowing the substitute to see/hear about any absence for an employee that requires a "Spanish" sub. Note: The more skills you give to substitute, the more absences the substitute could potentially qualify for.

Click **Apply Changes** to save.

Skill Description	Skill Expiration	Substitute Has Skill
Certified Teacher		☑
Spanish		☑

Edit | Apply Changes | Cancel

This substitute now qualifies for any employee's absence where the employee "Must Have", or "Should Have" (before the Lead Time expires) a substitute with the "Spanish" skill.
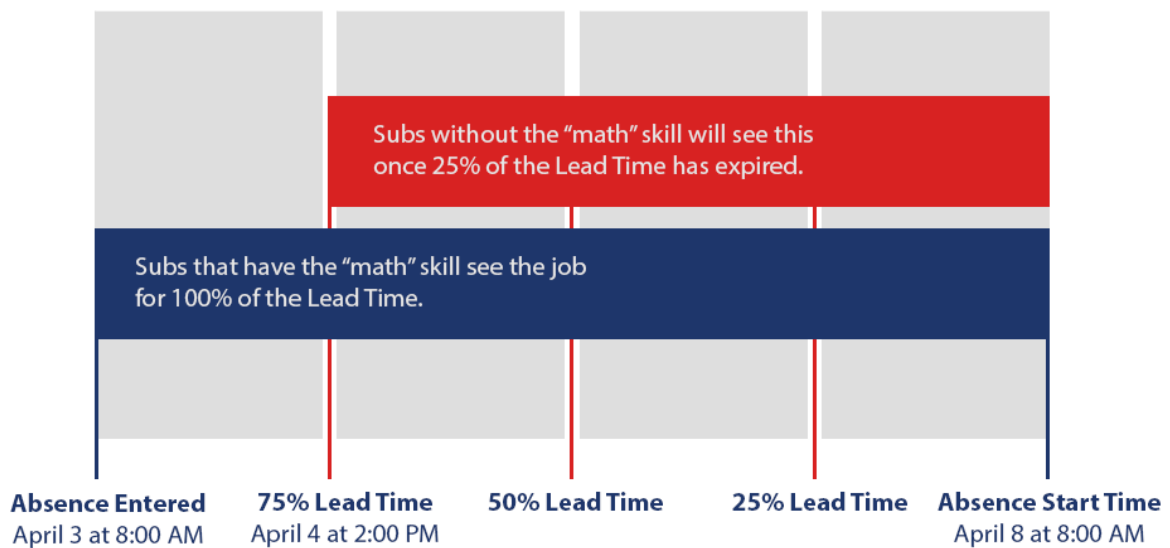
In Summary

It might help to think of Skill Matching as "Characteristic" Matching. In our example, it may make more sense to think of "Math" as a skill, but "Teacher" isn't really a "skill" in the dictionary sense of the word. Here is a summary of some of the ways that Skill Matching has been used.

1. You have a nurse on the system. The only person who can substitute for a nurse is someone who is also a nurse. So, you can create a skill called "Nurse," and check that skill in the "Must Have" column on the nurse's record. That way, only substitutes to whom you give the skill of "Nurse" can replace that employee.

2. You have 2 main groups of people: certificated teachers, and aides. Accordingly, your master list of substitutes consists of 2 main groups: subs who replace certificated teachers, and subs who replace aides. So, you can create 2 skills –"Certificated" and "Aide" – and check whichever one applies in the "Must Have" column for each employee on the system. Then you simply give each substitute whichever skill applies to that individual.

3. You have a subject area that most subs will be able to do, but some cannot, such as PE. You could create a skill called "No PE" and assign it as a "Must Not Have" skill for all your PE teachers. Then, give "No PE" to those subs who cannot do PE. They will be disqualified from replacing your PE teachers because of skill matching.

4. You have a subject area, such as Spanish, that really should have a specially qualified sub, but you can take other subs if time is running short. You could create a skill called "Spanish" (with Lead and Boundary Times that are appropriate) and assign it as a "Should Have" skill for your Spanish teachers. Then give "Spanish" to those subs who are specially qualified in Spanish. Then, those subs WITHOUT "Spanish" will not know about Spanish assignments until the Lead Time % of the Skill expires, or the Short Time Boundary has been crossed, while subs WITH "Spanish" do not have this limitation.

Let's see an absence entered 5 days in advance of the absence start time, with "Math" being used as a "Should Have" skill.

This absence is entered at 8 AM on 4/3 and will start at 8 AM on 4/8. Substitutes that do have the "Math" skill will be able to see this job, presuming that the substitute is on a "preferred substitutes" list that would allow them to see this job. Substitutes that do not have the "Math" skill cannot see this job yet, but they can eventually.

Once the "Lead Time %" has passed, in this case 25%, then the substitutes without the "Math" skill will be able to see this absence. 25% of the Lead Time of this absence will pass on 4/4 at 2 PM.

Subs without the "math" skill will see this once 25% of the Lead Time has expired.

Subs that have the "math" skill see the job for 100% of the Lead Time.

Absence Entered
April 3 at 8:00 AM

75% Lead Time
April 4 at 2:00 PM

50% Lead Time

25% Lead Time

Absence Start Time
April 8 at 8:00 AM

Let's say an absence is entered at 8 PM on 4/6 for 8 AM on 4/9, 2.5 days before the absence starts. When the absence is entered rather close to the start time of the absence, the "Short Lead Time Boundary" protects you.

Ordinarily, Aesop would not let a sub without the "Math" skill see this job until 25% of the Lead Time had expired (at 11 AM on 4/7)

Since 25% of the Lead Time would violate the "Short Boundary" (48 hours, 0 minutes), Aesop ignores the Lead Time percentage and enforces the "Short Boundary", letting substitutes without the skill of Math to see the job at 8 AM on 1/21, 3 hours sooner.

80% Lead Time

Subs without the "math skill will see this once the "short boundary" threshold of 48 hours, 0 minutes is crossed.

Normal 75% "should have" visibility.

Subs that have the "math" skill see the job for 100% of the Lead Time.

| **Absence Entered** | **75% Lead Time** | **50% Lead Time** | **25% Lead Time** | **Absence Start Time** |
| April 6 at 8:00 PM | April 7 at 11:00 AM | | | April 9 at 8:00 AM |
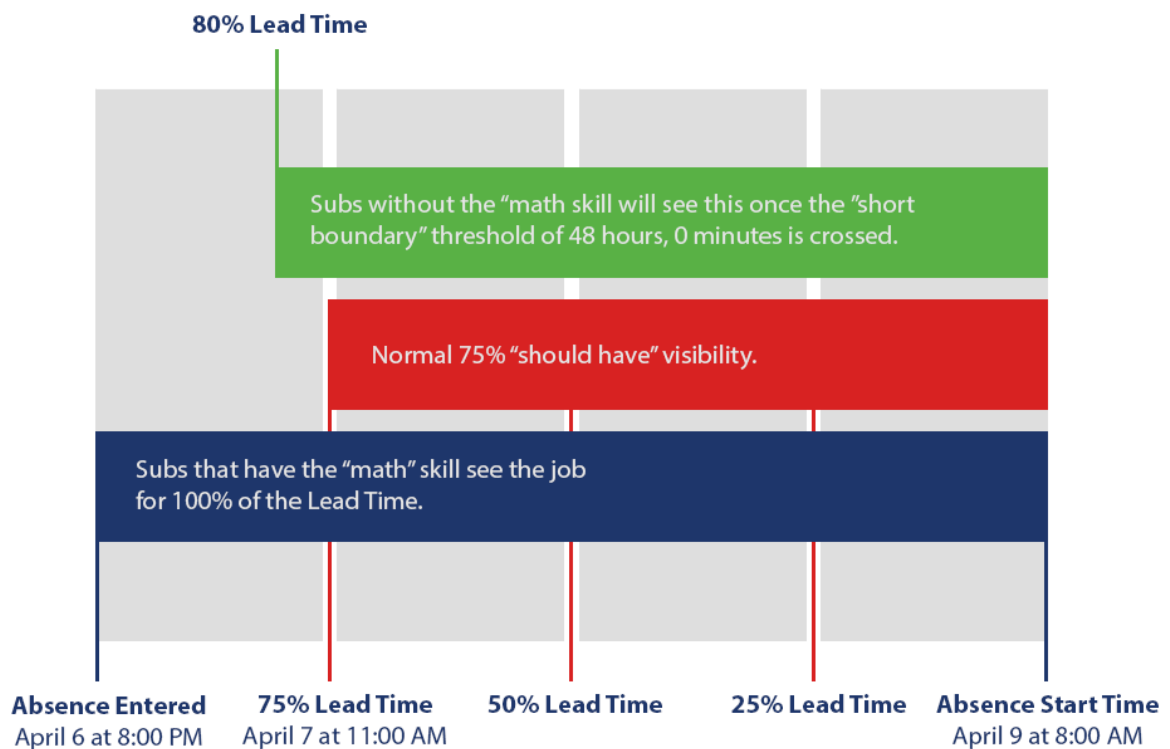
Let's say an absence is entered at 8 PM on 4/20 for 8 AM on 5/29, 39 days before the absence starts. When the absence is entered rather far in advance of the start time of the absence, the "Long Lead Time Boundary" protects you.

Ordinarily, Aesop would let a sub without the "Math" skill see this job once 25% of the Lead Time had expired, 29 days ahead of the start time.

However, the Long Boundary limits subs without the Should Have skill of "Math" to seeing this absence a maximum of 10 days, 0 hours in advance, a difference of 19 days.

24% Lead Time

Subs without the "math skill will see this once the "short boundary" threshold of 10 days, 0 hours is crossed.

Normal 75% "should have" visibility.

Subs that have the "math" skill see the job for 100% of the Lead Time.

Absence Entered	**75% Lead Time**	**50% Lead Time**	**25% Lead Time**	**Absence Start Time**
April 20 at 8:00 PM	April 30 at 11:00 AM			May 29 at 8:00 AM

When the absence is entered rather close to the start time of the absence, the "Short Lead Time Boundary" protects you. Let's say an absence is entered at 8 PM on 1/20 for 8 AM on 1/23, 2.5 days before the absence starts.

Let's look at "Should Have" skills in a different way. First, let's see an absence entered 5 days in advance of the absence start time, with "Math" being used as a "Should Have" skill.

A 25% "should have" skill would open up when 25% of the lead time expires, or at 2:00 PM on 1/21.

Absence Start Time
May 29 at 8:00 AM

Absence Entered
April 20 at 8:00 PM

Subs without the "math" skill will see this once 25% of the Lead Time has expired.

Subs that have the "math" skill see the job for 100% of the Lead Time.

1/20 at 8:00 AM   1/21 at 2:00 PM   1/25 at 8:00 AM

When the absence is entered rather far in advance of the start time of the absence, the "Long Lead Time Boundary" protects you. Let's say an absence is entered at 8 PM on 1/20 for 8 AM on 2/28, 39 days before the absence starts.

2. Since 25% of the Lead Time would violate the "short boundary", Aesop ignores the percent Lead Time and enforces the "short boundary" of 48 hour, 0 minutes (8 AM on 1/21) instead, 3 hours sooner.

1. Ordinarily, Aesop would not let a sub without the "math" skill see this job until 25% of the Lead Time had expired (at 11 AM on 1/21).

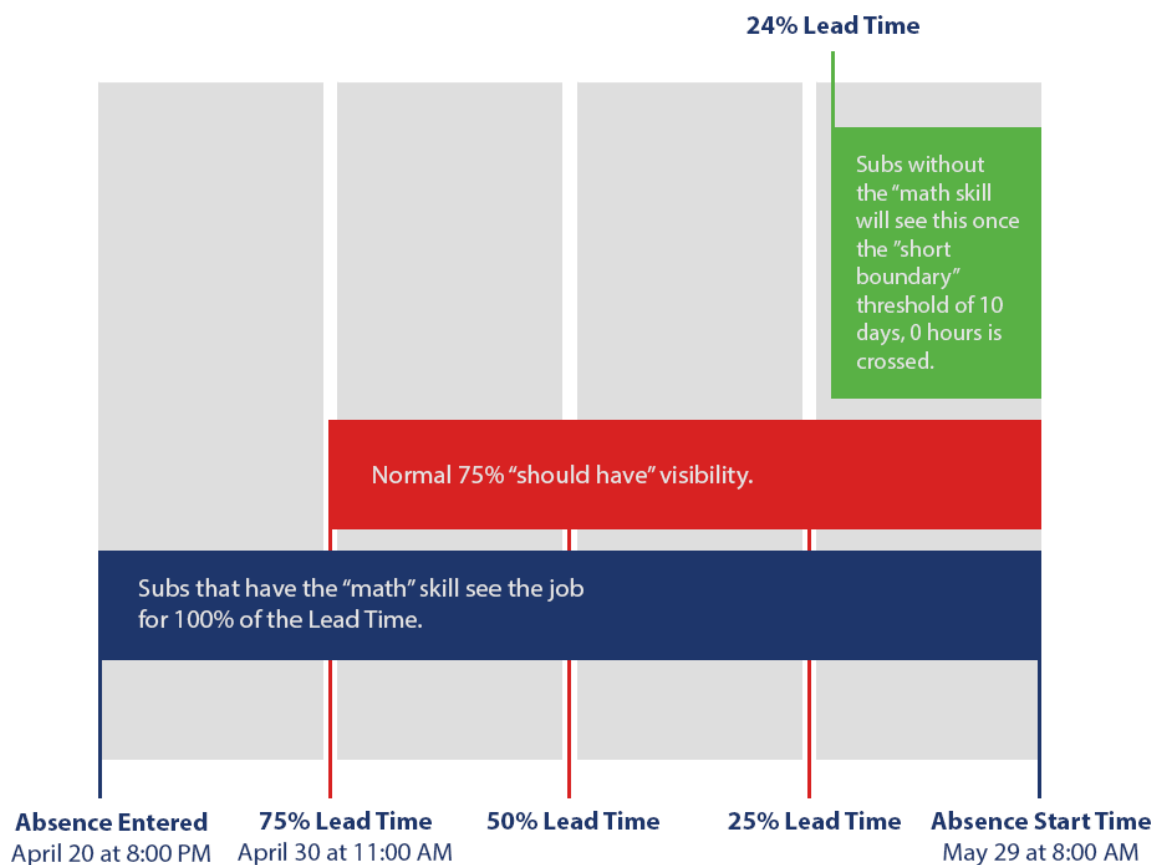Subs without the "math" skill will see this once 25% of the Lead Time has expired.

Subs that have the "math" skill see the job for 100% of the Lead Time.

Absence Entered
1/20 at 8:00 AM
(60 hours before the absences starts)

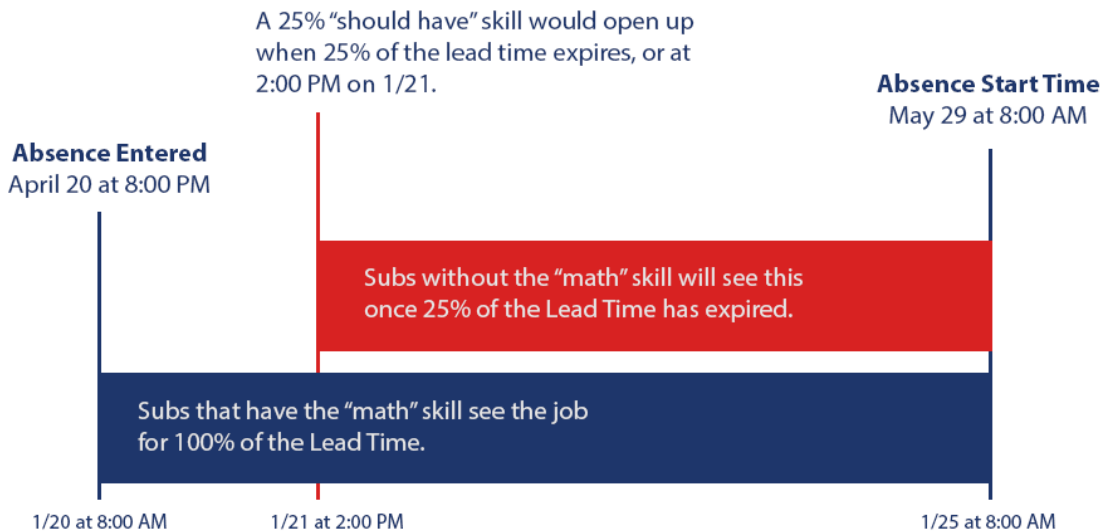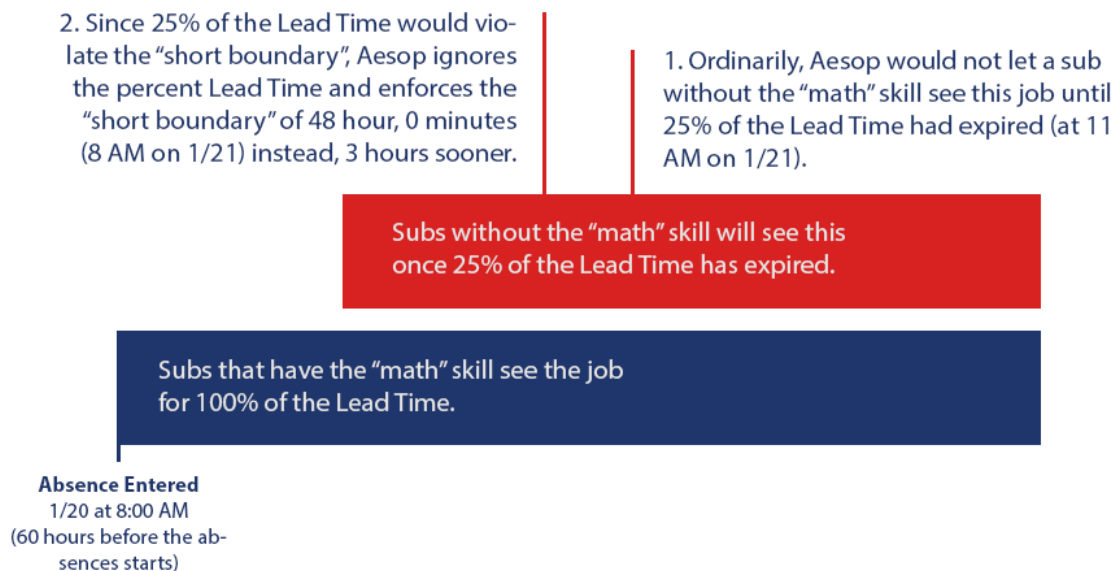When the absence is entered rather far in advance of the start time of the absence, the "Long Lead Time Boundary" protects you. Let's say an absence is entered at 8 PM on 1/20 for 8 AM on 2/28, 39 days before the absence starts.

1. Ordinarily, Aesop would let a subwithout the "Math skill see this job once 25% of the Lead Time had expired (29 days). but since 25% of the Lead Time would be too far in advance of the "Long Boundary" of 10 days.

2. However, the Long Boundary limits subs without the Should Have skill of "Math" to seeing this absence a maximum of 10 days, 0 hours in advance, a difference of 19 days.

Subs without the "math" skill won't see this until the absence is within 10 days of starting, even though a Lead Time of 25% would normally let them see the job about 29 days out.

25% Lead Time is approximately 29 days before the absence starts

Subs that have the "math" skill see the job for 100% of the Lead Time.

Absence Entered
1/20 at 8:00 AM
(39 days before the absences starts)

Absence Starts
2/28 at 8:00 AM