Manage Substitute Instructors for Classes

Get rid of your manual tracking system for substitutes! Use the **Substitutes** feature to assign substitutes for absent instructors. Easily record, view, and manage substitutes for all of your classes.

Save even more time by also utilizing the **Staff Availability** feature. It's the perfect pairing! Substitute records are added, updated, and deleted whenever Staff Time Off is added, updated, and deleted either from within Jackrabbit or the Staff Portal.

And, to make the Substitutes feature even better, you control settings that can:

- allow instructors to view and manage the classes they are going to substitute in the **Staff Portal**.
- advise parents when a substitute has been assigned to a class in the **Parent Portal**.
- notify parents and students at **Self Check-in** when a regular instructor is away and a substitute has been assigned.

Expand/Collapse All

Get Set Up to Use Substitutes

Before getting started with the Substitutes feature, there are some settings to review.

User ID Permissions	The Substitutes feature is controlled by two User Permissions: - The **View Classes** (*Classes* category) permission only allows Users to view substitutes on the *Instructors* tab in the *Class* record. No action can be taken (no *Assign Substitute* button or row menus). - The **Manage Substitutes** (*Classes* category) permission allows Users to add, edit, and delete Substitute records. - This permission defaults ON for Owner/Manager **User roles** only. To edit User Permissions, go to the **Gear** icon > **Settings** > **User IDs** (left menu) > Select a **User ID** > **User Permissions** (left menu). Learn more about **Permissions for Jackrabbit Users**.

Notification Settings	Decide whether or not Jackrabbit should send a notification email to the instructor who is away and to the substitute taking their class any time the Substitute record is assigned, edited, or deleted. The *Send notification email to absent instructor and substitute instructor when a record is assigned, edited, or deleted* setting defaults to ON for all Users. To edit the setting, go to the **Gear** icon >**Settings** > **General** > **Organization Defaults** (left menu) and scroll down to the **Class Settings** section.
Staff Requirements	Substitute instructors must be added to Jackrabbit (**Staff** menu > **Add Staff**). For the Substitutes feature, the *Summary* tab of all *Staff* records must have: • Status = **Active** • Instructor = **Yes** • Email address (required for notification emails) **TIP**: If you are using the **Staff Portal**, review the substitutes' *Portal Settings* tab in their *Staff* record. Ensure they have the proper settings to manage the classes they are assigned to as a substitute. Optional but **super cool**: • When assigning a substitute, the drop-down list can display **Staff Skills** if any have been entered. To ensure a qualified substitute is selected, add Staff Skills, for example, Tumbling or Acro, on the *Skills* tab of the *Staff* record. See this in action **below**. Learn more about **Staff / Instructor Skills**. • Knowing when staff are available to work and when they need time off is essential for scheduling classes and finding substitutes. When you use the **Staff Availability** feature, time off and availability are added to the *Availability* tab of the *Staff* record. The Daily Calendar (Day View) displays time blocks for an at-a-glance view of who's scheduled to be in and out. See this in action **below**. Learn more about **Staff Availability**.
Class Requirements	In order to assign a substitute to a class, the *Class* record must have: • at least one **Instructor** assigned on the *Instructors* tab. • a **Class Start Date** (*Summary* tab). • at least one **Day** of the week (*Summary* tab). • a **Start Time** and **End Time** (*Summary* tab). If any of these fields are missing, an error message will display on the *Instructors* tab when attempting to assign a substitute.

How the Substitutes Feature Works

Introducing 'The Players'

The Substitutes feature touches several areas of Jackrabbit:

- Class record > Instructors tab
- Substitutes report
- Dashboard Alert

When you are also saving HEEPS of time by using the **Staff Availability** feature, another area comes into play:

- Staff record > Availability tab

And you can save even MORE time by bringing in the **Staff Portal along with Staff Availability**!

Okay, now that we know who is who, let's go through how they all play in the sandbox together.

Create a Substitute Record

Substitutes are managed using a Substitute record. A Substitute record is created in two ways.

Assign a Substitute within Jackrabbit

On the *Instructors* tab of the *Class* record, select the **Assign Substitute** button to open the *Assign Substitute* window.

- If there is more than one instructor, select the instructor who will be absent.
- Use the calendar to select the dates (*From* and *To*) of the instructor's absence. There is a substitute record created for every class the instructor will miss in the date range. Note: Days the class doesn't meet are disabled on the calendar.
- Options for assigning the substitute:
  - **Select Substitute** - Use the drop-down menu to select the substitute. If you have many names in the list, use the *Search All Substitutes* field to look for a specific name (instructors already assigned to the class will not be available for selection).
    TIP: Showing **Staff Skills** allows you to ensure you are selecting a substitute who is qualified to teach the class.
  - **Assign Later** - To record the instructor's absence but not select a substitute at this time, select Assign Later. Substitute records marked Assign Later will trigger an Alert icon in the *Alerts* section of the *Executive Dashboard* (see **below**).
  - **Not Needed** - To record the instructor's absence but not select a substitute at all for the absence, select Not Needed. Doing this will have the instructor's absence reported on the *Weekly* and *Daily View Calendars* (see **below**).
- Optionally add **Comments** (max 500 characters). These comments are included in the notification emails sent to the absent instructor and the substitute. They are also shown in the grid on the *Instructors* tab of the *Class* record and the Substitutes report.

Automatically Create a Substitute Record

When using Staff Availability, a Substitute record is automatically created when a Time Off entry is added for an instructor. #timesaver. The time off can be added from within Jackrabbit or by staff in the Staff Portal.

The addition of a Time Off entry starts a process where Jackrabbit compares the time off with the instructor's schedule and creates a Substitute record for each of their classes that meet during the time off. Those records are added to the *Instructor* tab of each *Class* record and are marked *Assign Later*. They are also added to the Substitutes report and the Executive Dashboard Alert (if within the next 30 days).

Notes:

- If there has already been a Substitute record created for a class occurrence in the period of time off, Jackrabbit will not create a duplicate record.
- When a Time Off entry is added, a toast message will pop up (*thus its name!*) to let you know how many Substitute records were created. It will contain a link that opens the Substitute report for your review.
- Substitute records automatically created in the Staff Portal will include a comment "Auto-created by Staff Portal Time Off entry". Those created within Jackrabbit will have this comment, "Auto-created by Admin Time Off entry". These comments are viewable on the Substitutes report, in the *Class* record > *Instructors* tab, and in the *Staff* record > *Availability* tab.

Edit a Substitute Record

A Substitute record can be edited using the row menu ( ) in the Substitutes grid on either the *Instructors* tab of the *Class* record or on the *Substitutes* report.

When utilizing Staff Availability, a Substitute record is edited when an edit is made to a Time Off entry. For any edits made to a Time Off entry, Jackrabbit compares the edited time off period to the instructor's schedule and will create or delete Substitute records as needed. Time Off entries can be edited either in Jackrabbit on the *Availability* tab of the *Staff* record or by staff through the Staff Portal.

Delete a Substitute Record

Delete individual substitute records using the row menu ( ) in the Substitutes grid on either the *Instructors* tab of the *Class* record or on the *Substitutes* report. Use the checkboxes to choose substitute records and then select the more menu ( ) to delete several records at once (*Mass Delete*). Note: Once any checkboxes have been selected, the individual row menus are removed from the grid, and the *Print* and *Export to Excel* options are removed from the more menu.

Staff Availability deletes Substitute records when either a Time Off entry has been edited to exclude the class for which it was created or the related Time Off entry has been deleted.

Tracking and Reporting for Substitutes

Executive Dashboard

On the Executive Dashboard, in the Informative Alerts section of the *Alerts* widget, the *Substitutes next 30 days* alert displays the number of records for substitution dates in the next 30 days.

- Users with the right permissions can click the **Substitutes next 30 days** alert to open the Substitutes report filtered for the next 30 days; this filter can be cleared to view all substitutes.
- This alert displays the number of records for substitution dates in the next 30 days that are marked Assign Later in a gray circle. This indicates that a substitute still needs to be found for the class and assigned on the Instructor tab of the Class record.

Substitute Report

The Substitute report is accessed from either the *Reports* menu > *Find Reports* or from the link in the Dashboard alert for *Substitutes next 30 days*.

- Individual substitute records can be edited or deleted using the row menu ( ).
- Options to Print, Export to Excel, or Mass Delete are located in the more menu ().
- Use the search fields in each column to filter for specific records.

Calendars

Weekly View

Available on every Jackrabbit page (top right), click the   link, to access the Weekly Calendar.

- Hover over a class to view the absent instructor and the substitute if one has been assigned.

Day View

Available on every Jackrabbit page (top right), click the   link, to access the Weekly Calendar. Click the **Day View** (button), or a specific **day/date** in the calendar, to open a *Day View*.

- Staff Skills for each instructor are displayed on the Daily Calendar.
- Staff Availability is shown for staff members who have entered time off or availability for that day.
- The class block is added to the substitute's column on the Daily Calendar.
- The class block with the absent instructor is shown with a diagonal overlay.
- Hover over either class block to view class information, including the absent instructor and the substitute if one has been assigned.

Monthly Calendar

The **Monthly Calendar** is accessed by pointing to *Classes (menu) > Class Reports > Monthly Schedule/Calendar*.

- Hover over a class to open a small summary pop-up with *Class Name, Start/End Times, Current Size, Current Openings, Current Waitlist #, Start / End Dates, Instructor's Name/Substitute Name, Meeting Day, and Class Fee*.
- Check the **Show Instructors** checkbox at the top of the page to show instructors and substitutes names with classes.

Weekly Schedule

In a *Staff* record, select the **Weekly Schedule** button to open a calendar for the current week, filtered for that instructor. As well as their own classes, those they are assigned to as a substitute will display.

Staff Portal > My Schedule

Within the Staff Portal, the *My Schedule* tab features a useful section called *My Substitutions*. This area allows logged-in staff members to conveniently view both the classes they are scheduled to substitute for, as well as the classes that will have a substitute in their place.

Parent Portal > Class Cards

In your Parent Portal Settings, you have the option to display substitutes and provide details about any substitutions in the classes the students are enrolled in.

Self Check-in

When checking in, parents and students are informed if there is a substitute assigned for their regular instructor.