



SMART HR

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SMART Systems Development

1

Today's Agenda

- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

2

Mandatory Reminders

3

Quiz

Who knows what mandatory requirement went into effect Jan 1, 2024 - besides Earned Sick and Safe Time?

Answer: *Union Info*

Under MN Statute 179A section 07 subd 8

- ▶ Every 120 days Districts are required to provide to designated unions all employees in that union designated employee information.
- ▶ A public employer must notify an exclusive representative within 20 calendar days of the separation of employment or transfer out of the bargaining unit of a bargaining unit employee.
- ▶ 7/1/23: Districts are now required to provide to designated unions new hire/termination/change of position within 20 days of status change.

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Agency | Compliance | Union Info

The screenshot shows the 'Union Info' application interface. On the left, there is a 'Selection' menu with 'Union' selected. Below it, a 'Choose Report' dropdown is set to 'ADASSIT Admin Assistants and Cashiers'. The 'As Of Date' is '04/01/2024'. A list of employees is displayed with columns for Name, Adjusted Hire Date, Job Title, Location, Home Phone, Work Phone, and Mobile Phone. A 'Print Manager' dialog box is open in the foreground, titled 'Print Proofing Data'. It shows printer settings for 'Microsoft Print to PDF' and a table of documents to be printed. A red box highlights the 'Save To File?' button in the 'Documents' table.

Print?	Document Title	Orientation	Page Range	Range Selection	Copies	Collate	Save To File?
<input checked="" type="checkbox"/>	Union-120	<input checked="" type="radio"/> Landscape <input type="radio"/> Portrait	All		1	<input type="checkbox"/>	<input type="button" value="Save"/>

5

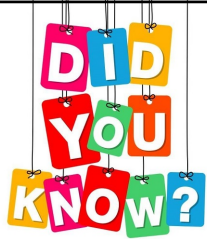
Agency | Periodic | PERA Annual Leave Reporting

The screenshot shows the 'PERA Annual Leave Reporting' application. It has tabs for 'Adjustment' and 'Finalize'. The 'Fiscal Year' is set to '2023'. The 'Sort' options are 'Id', 'Name', and 'Leave Reason', with 'Name' selected. There is a 'Do Not Send All' checkbox and a 'Generate Finalized Data' button. A table displays leave records with columns for Id, Name, Leave Reason, Leave Start, Leave End, Hourly Rate, Total Hours Missed, Note, and Do Not Send.

Id	Name	Leave Reason	Leave Start	Leave End	Hourly Rate	Total Hours Missed	Note	Do Not Send
1015	ATKINS, FORREST 1015	Medical Leave	03/31/2023	06/30/2023	\$.00	.00		<input type="checkbox"/>
474193	JIMENEZ, ALEJANDRO 474193	Medical Leave	04/03/2023	06/30/2023	\$.00	.00		<input type="checkbox"/>
881614	WARD, MAME 881614	Family Leave	05/25/2023	05/30/2023	\$.00	.00		<input type="checkbox"/>

► Fiscal year basis - Due for schools on July 31, 2024
Mnpera.org -> Annual Leave Q&A

6



For plan years starting in 2024 the ACA affordability percentage is 8.39%.

Jan renew plan affordability amount =

\$101.93 (14500 X 8.39% /12)

Feb-Dec renew plan affordability amount =

\$110.80 before the renew month (14500 X 9.12% /12)

\$105.29 after the renew month (15060 X 8.39% /12)

7

How many of you have been with us since we started ACA?

In the beginning, I told you if you could:

- ▶ accurately track people's hours worked
- ▶ create data rows that tell me:
 1. new hire, rehire, or termination dates
 2. whether they were offered insurance or not
 3. and whether they enrolled or waived...

You didn't need to know more about ACA reporting and codes than that, we would help you?

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How many of you know that this year, the IRS required employers with >10 ACA forms to electronically file?

We have been doing that since day 1...

- ▶ we could help interpret IRS codes related to your data,
- ▶ created an easy way to resubmit files back to the IRS,
- ▶ And provided audit support for IRS inquiries and fines.

That's the power in being part of the Regional support centers...they are really here to provide SUPPORT and software to go with that...so thanks for trusting us!

Happy almost 10 year anniversary!

9

Wage Statements - TimeOff now includes HrsWorked plans

Wage Statement Setup

Employee Selection Status Info Pay Info TimeOff Info

Adjustments Check the box next to the column names to turn on adjustments for that column.

TimeOff Plan Unit Cycle
 Accrual Rate Frequency Comment

Adjust Filter Sort
Show All

All Not Eligible Do Not Adjust All

Retrieve Deduction Info

Employee Count: 629

Id	Not Eligible	Not Adj	Name	TimeOff Plan	Accrual Rate	Unit	Frequency	Cycle	
2758			Beach, Olivia 2758						
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time		.00	HOUR	System generated Accrual		
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time		.00	HOUR	System generated Accrual		
Comment:									
3587			Bean, Scott 3587						
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time 48 Fro		.00	HOUR	System generated Accrual		
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time 48		.00	HOUR	System generated Accrual		
Comment:									
	<input type="checkbox"/>	<input type="checkbox"/>	PERSONAL PARA		16.00	HOUR	SEPTEMBER	Once per year	
	<input type="checkbox"/>	<input type="checkbox"/>	PERSONAL PARA		16.00	HOUR	SEPTEMBER	Once per year	
Comment:									
	<input type="checkbox"/>	<input type="checkbox"/>	Sick Leave - PARA (ESST)		88.00	HOUR	SEPTEMBER	Once per year	
	<input type="checkbox"/>	<input type="checkbox"/>	Sick Leave - PARA (ESST)		88.00	HOUR	SEPTEMBER	Once per year	
Comment:									
3532			Beasley, Luz 3532						
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time		.00	HOUR	System generated Accrual		
	<input type="checkbox"/>	<input type="checkbox"/>	Earned Sick and Safe Time		.00	HOUR	System generated Accrual		
Comment:									

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Wage Statement Signatures tracking

The screenshot shows a web application interface for tracking wage statement signatures. At the top, there's a header 'Wage Statement Signatures' and a sub-header 'Employees'. Below the header is a filter section with radio buttons for 'Employee Signed', 'Hide in eR', '1st Attempt', 'Comment', 'eR Ready Date', 'Mail Date', '2nd Attempt', and 'No Response'. There are also buttons for 'Filter', 'Sort', 'Show All', and 'Adjust Values'. A tooltip on the right says 'To add an attachment either select the row, and drag and drop the file in the box to the left, or click on the attach button and navigate to the attachment.' The main area contains a table with the following data:

ID	Name	Fiscal Year	Date Changed	eR Ready Date	Hide In eR	Statement Type	Employee ID	Date Viewed	Date Signed	Attach Options	Mail Date	1st Attempt	2nd Attempt	No Response
479	Atkins, Florence 479	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original	206		00/00/0000	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
1447	Baldwin, Celia 1447	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original	206		00/00/0000	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
1187	Ball, Eric 1187	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original	1187		02/09/2022	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
1538	Barron, Noah 1538	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original			00/00/0000	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
392	Benjamin, Jack 392	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original		2/1/2022	00/00/0000	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
1589	Bernard, Tyler 1589	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original			00/00/0000	Attach	00/00/0000	02/01/2022	02/03/2022	<input type="checkbox"/>
302	Bishop, Rafael 302	2022	1/31/2022 4:05 PM	2/1/2022	<input type="checkbox"/>	Original	302	2/2/2022	02/02/2022	Attach	00/00/0000	02/01/2022	00/00/0000	<input type="checkbox"/>

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Agency | Periodic | Flex Nondiscrimination Test

The screenshot shows a web application interface for 'Extract Flex Nondiscrimination Test'. It has several sections:

- Plan Year Select:** From 01/01/2023, Thru 12/31/2023, Employer Code: [text box]
- Confirm Date Range:** [button]
- Annual Dep Care Contribution, Annual HSA Contribution, Annual Med FSA Contribution, Annual Pretax Premiums Compensation:** [list of options]
- Get Compensation Amounts From:** Pay Detail
- Criteria:**
 - Include Wildcarded Codes Like:** [empty box]
 - Exclude Wildcarded Codes Like:** [empty box]
 - Include The Following Specific Codes:**
 - BCGRCHECK
 - CHILDSUPP1
 - CRUNION
 - DCP_EE
 - DCP_ER
 - DCP_FIXR
 - DEFCOMP
 - DEFCOMP%
 - DEFCOMP%G
 - DEFMATCH
 - DEFMATCH%G
 - DENNOTFLEX
 - DENNOTFLXR
 - DENTAL
 - DENTAL2FLX
 - DENTAL2R
 - DENTALFLX
 - DENTALR
 - DUES1
 - DUES1%
 - DUES2
 - FSADEP21
 - FSADEP22
 - FSADEP23
 - FSADEPSP08
 - FAMED23
 - GARN_FED
- Buttons:** Save and Display Values, Extract Active Data, Add Selected Codes

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Agency | Periodic | PERA GASB Audit

The screenshot shows the 'PERA GASB Audit' application window. At the top, there is a 'Select Fiscal Year' dropdown menu. Below it are four tabs: 'PERA Audit Data', 'Pay Fiscal YTD w/Extract', 'Pera Exclusion', and 'Wage Statement'. The 'PERA Audit Data' tab is active, displaying a table with the following columns: Employee ID, Name, Birth Date, Original Hire Date, Adjusted Hire Date, PERA Start, PERA Stop, and Job Position. The table is currently empty. In the top right corner of the window, there are 'Print' and 'Save to Client Files' buttons. A status bar at the bottom right indicates 'Page 1 of 1', '3/3/2023', and '2:13 PM'.

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Agency | Periodic | TRA Audit for State Auditor

The screenshot shows the 'TRA Audit for State Auditor' application window. At the top, there is a 'Select Fiscal Year' dropdown menu set to '2024'. Below it are four tabs: 'TRA Employees', 'Earnings Register', 'TRA Pay Codes', and 'New Hires'. The 'Earnings Register' tab is active, displaying a table with the following columns: Id, Name, Wage Type, Amount, Date, Calendar/Seq, and Pay Code. The table is currently empty. In the top right corner of the window, there are 'Generate Earnings Register' and 'Click through and save or print the four tabs for the TRA Audit' buttons. A status bar at the bottom right indicates 'Page 1 of 1', '04/01/2024', and '7:51 PM'.

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Agency | Periodic | Inactivate eR W2 due to W2C

Select One Year	Name	ID	SSN	W2C checkbox
2023	Abbott, Chris 3661	3661	500-12-3661	<input type="checkbox"/>
	Abbott, Erik 2061	2061	500-11-2061	<input type="checkbox"/>
	Acevedo, Grace 879	879	500-13-0879	<input type="checkbox"/>
	Adams, Shane 3699	3699	500-12-3699	<input type="checkbox"/>
	Aguirre, Jacqueline 3021	3021	500-12-3021	<input type="checkbox"/>
	Albert, Brandon 2649	2649	500-11-2649	<input type="checkbox"/>
	Albert, Della 2731	2731	500-11-2731	<input type="checkbox"/>
	Albert, Georgia 2848	2848	500-11-2848	<input type="checkbox"/>
	Alexander, Dwayne 2831	2831	500-11-2831	<input type="checkbox"/>
	Alford, Emmett 674	674	500-13-0674	<input type="checkbox"/>
	Allen, Ashley 3440	3440	500-12-3440	<input type="checkbox"/>
	Allen, Lucas 3526	3526	500-12-3526	<input type="checkbox"/>
	Alston, Victor 3738	3738	500-12-3738	<input type="checkbox"/>
	Alvarez, Cecilia 3577	3577	500-12-3577	<input type="checkbox"/>
	Alvarez, Elena 2356	2356	500-11-2356	<input type="checkbox"/>
	Alvarez, June 620	620	500-13-0620	<input type="checkbox"/>
	Alvarez, Terri 3421	3421	500-12-3421	<input type="checkbox"/>

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How many of you are following the Secure 2.0 Act?

The piece I am referring to is student loan 403b match contributions that was also effective Jan 1, 2024.

Are any of you considering implementing it in the next fiscal year?

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Today's Agenda

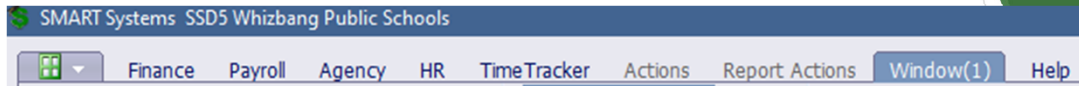
- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

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Random Reminders

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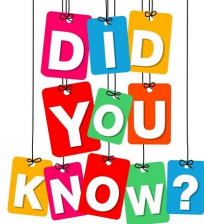
Did anyone notice the menus changed?



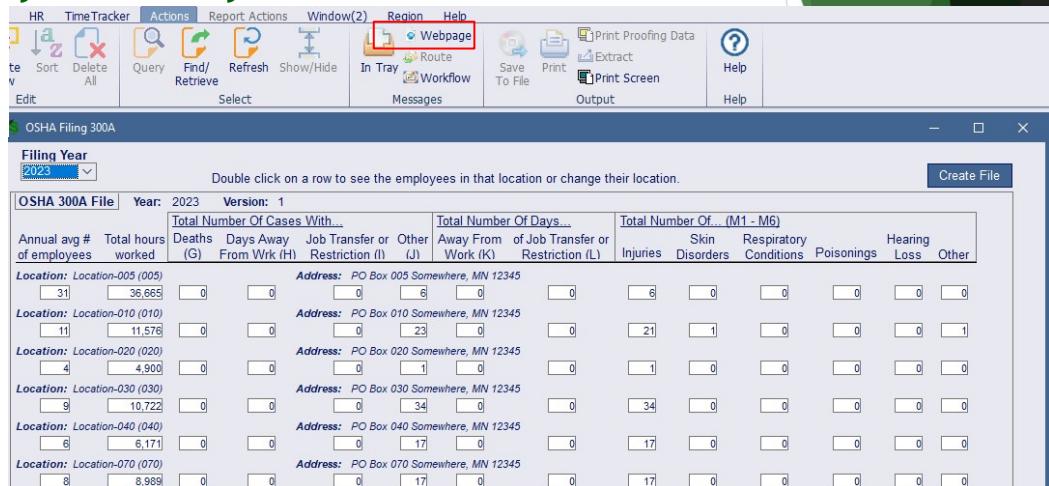
Does anyone remember from last year's conference why?



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The Webpage menu icon will take you directly to websites...

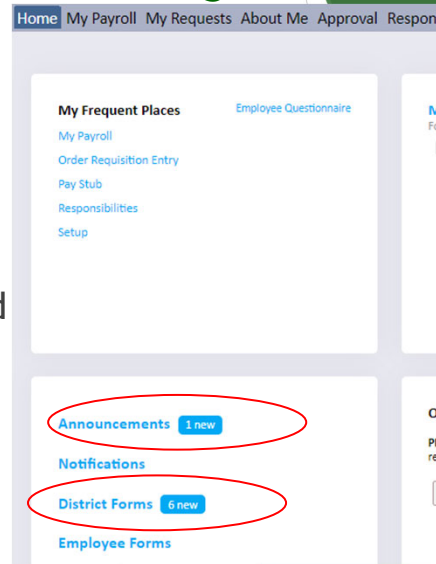


Also on STAR reporting, New Hire reporting, PERA/TRA reporting, Unemployment and MDE to get licenses.

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Districts can setup employee information that needs to be signed and notify them through Announcements

- It will go to their dashboard
- Employees will see a new alert
- Districts can track who has viewed and signed it



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For Example:

The screenshot shows an email notification interface. At the top, there are four tabs: '(1) Announcements', '(655) Notifications', '(6) District Forms', and 'Employee Forms'. Below the tabs, there is a message list table with columns: Priority, From, Subject, and Received. A 'Delete' button is visible above the table, and a 'View' button is below it. A message preview window is open, showing the following text:

Message

1) Please Review and Sign the forms listed in the District Forms page from your dashboard. These include:

- Administrator's packet
- Network Resources Agreement
- Employee Access Directions
- Harassment and Violence
- Hepatitis B Vaccination
- HIPAA Privacy Practice

2) The following pages need to be completed in the My Payroll Menu:

- MN W4
- W4-2021
- Direct Deposit Form
- Wage Statement

3) The following pages need to be completed in the About Me Menu:

- Emergency Contacts
- Employee Information
- Medical Information
- Immunizations

The 'Message' window has a 'Close' button in the top right corner and a red circle around the bottom right corner.

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District Forms

Announcements (661) Notifications (6) District Forms (1) Employee Forms

Filter Options
Signed All Viewed All

	Description	Note	Created Date	Form Type	Form Category	Date/Time Signed
Sign View	Employee Access Directions		3/13/2021 12:59:39 PM		New Hire Materials	
Sign View	Employee Handbook		3/13/2021 12:49:54 PM	Master Agreement	New Hire Materials	
Sign View	Harassment and Violence		3/13/2021 1:00:15 PM		New Hire Materials	
Sign View	HIPPA Privacy Practice		3/13/2021 12:57:46 PM		New Hire Materials	
View View Signature	Network Resources Agreement		3/13/2021 12:58:41 PM		New Hire Materials	3/13/2021 2:04:44 PM
View	Teacher's Contract		3/13/2021 1:01:11 PM		Ongoing Employment	

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Employee Forms

Announcements (661) Notifications (6) District Forms (1) Employee Forms

Filter Options
Signed All Viewed All

	Description	Note	File Name	Created Date	Form Type	Date/Time Signed
Sign View	Employee Disciplinary Action Notice		Disciplinary Action Notice.pdf	3/13/2021 1:45:02 PM	Disciplinary Action	

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SMART Messaging

The screenshot shows the SMART Messaging interface. On the left is a dashboard with sections for TimeTracker Hours, My Calendar, and My Frequent. The main area is a message composition window titled "SMART Messaging". It includes a "Name" dropdown menu with a list of employees: Hopper, Sonia 3566; Lambert, Milton 2534; Payroll Department; Powers, Nicholas 1222; West, Paulette 278; and Wilkins, Jose 1171. The "Subject" field contains "I changed my direct deposit" and the "Importance" is set to "High". The "Message" field contains the text: "I just wanted to make sure you see my change to my direct deposit information. My bank account was hacked and I need this new account to take effect as soon as possible. My old account has been disabled." Below the message field are several "Attachment" fields, each with a "Choose a file or drag it here" prompt. A "test.pdf" file is already attached. At the bottom right of the composition window, a "Save to Emp Notes" button is circled in red.

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SMART Dashboard will now have a message:

The screenshot shows the SMART Dashboard with a "Workflow Message" window open. The dashboard on the left has a "Finance Defaults" section with various dropdowns and a "Save" button. Below that is a "Messaging" section with an "Inbox" tab. A message from "Hancock, Alexander 315" with the subject "I changed my direct deposit" is highlighted in red. The "Workflow Message" window shows the message details: "From Hancock, Alexander 315", "Sent 03/06/2023 8:06 AM", "Summary I changed my direct deposit", and "Reply By Action File(s) test.pdf". The message body contains the same text as in the previous screenshot. At the bottom right of the workflow message window, a "Save to Emp Notes" button is circled in red.

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Employee notes:

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Set a reminder if you don't have time to deal with now...

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Public vs Private Retrieval Arguments

The screenshot shows the 'Employees by Id' application window. On the left, there is a 'Create Report' section with the following fields:

Retrieval Argument(s)	Value(s)	Wildcards
ID	1%	<input checked="" type="checkbox"/>
Primary Status	AC	<input type="checkbox"/>
Secondary Status		<input type="checkbox"/>
Location		<input type="checkbox"/>

Below these fields is a note: "The ID you enter in this field is compared to the 'ID' in the emp_basic table. You have the option to select all, multiple, or a range of ids in this retrieval. Please click on the ? for more information."

On the right, there is a table of employee records:

ID	Name
1646	ABBOTT,CAROLYN 1646
1219	ABBOTT,KRISTIN 1219
1729	ACEVEDO,RANDOLPH 1729
1173	ACOSTA,ROCHELLE 1173
1251	ACOSTA,ROSIE 1251
1495	ADKINS,MARIA 1495
1644	AGUILAR,ADRIAN 1644
1504	AGUIRRE,JOE 1504
1060	ALBERT,MARCUS 1060
1282	ALLISON,WILSON 1282
1149	ALVARADO,LEONA 1149
1028	ALVARADO,OTIS 1028
1408	ANDREWS,JUANA 1408
1350	ARMSTRONG,TARA 1350
1428	ARNOLD,BRYANT 1428

At the bottom right, there is a 'Report Defaults' section with radio buttons for 'Public' and 'Private' under 'Delete' and 'Save' options.

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Help screens

Menu Group

Window

This screenshot shows a menu group with the following items:

- Employee Information
- Agency Reporting
- Payroll Exceptions
- Third Party Processing
- Payroll Processing
- 941 and W-2
- Payroll Setup
- Help
- General Ledger
- YTD Reports
- Payroll Utilities

This screenshot shows a 'My Favorites' window with the following sections:

- Quick Access:** New Hire, Employee Info, Paycheck Data, Rehire Employee, Sample Check, SSN Search, Terminate Employee.
- TimeTracker most used:** Employee TimeTracker Setting.
- Emp Info most used:** New Hire, Employee Info, Paycheck Data, Rehire Employee, Terminate Employee.

This screenshot shows the 'Employee Information' window for a selected employee. The 'Employee ID' is 1646. The window is divided into several tabs: Status Changes, Supp Info, Basic Info, Name/Address, 3rd Party Info, ACA Info, Background, Contract Info, and Photo. The 'Basic Info' tab is active, showing fields for:

- Changed: 00/00/0000
- Prim Status: [Dropdown]
- Sec Status: [Dropdown]
- Retire Status: [Dropdown]
- Orig Hire Date: 00/00/0000
- Adj Hire Date: 00/00/0000
- W-2 Output: [Dropdown]
- Exempt:
- Job: [Dropdown]
- Location: [Dropdown]
- Department: [Dropdown]
- Check Loc: [Dropdown]
- Unemp Loc: [Dropdown]
- EEO Loc: [Dropdown]
- EEO Code: [Dropdown]
- TT Location: [Dropdown]
- Leave Type: [Dropdown]
- Leave Reason: [Dropdown]
- Actual Start Date: 00/00/0000
- Expected Return: 00/00/0000
- Actual Return: 00/00/0000
- Last Worked: 00/00/0000
- Terminate Reason: [Dropdown]
- Eligible Rehire: [Dropdown]

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Folders can be built in Employee Notes

Folders are automatically setup for all employees

Employment Notes

Amy A Adams
Orig Hire Date 1/1/1999 Adj Hire Date 1/1/1999

Print Note

Date	Confidential	Description (Required)	Attachment	Attachment Type	View in SeR	Sign	Active
03/03/2023	<input type="checkbox"/>						<input checked="" type="checkbox"/>

Note Added By: Adams, Aaron A View Date: Sign Date:

Add Folder Add Sub Folder Delete Note Insert Note Notes marked as 'Confidential' are only visible to whoever entered them.

Rename Folder Delete Folder

Drag Attachment Here

Open Attachment Add Attachment Hide Inactive

Save Close

The purpose of employee notes is to offer a tool to end users to assist in storing employee information. Each end user should have an understanding of how record regulations impact their unique circumstances. Questions or concerns regarding compliance with existing record retention or what is viewable to district personnel should be directed to someone with proper expertise in this area of regulation.

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Employees will be emailed if certain data changes in Payroll...but only if you turn it on

- Paycheck Data
 - ▶ W4
 - ▶ Direct Deposit

Your W4 information was changed in SMART HR

To Stefanie Sylte

Aaron Aadams changed your W4 information in SMART HR, effective immediately. If this change was not initiated by you, please contact the business office immediately.

- Employee Information

- ▶ Address
- ▶ Email Address: work or home

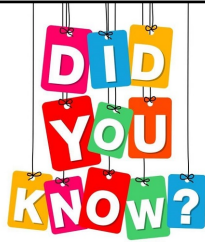
Your address was changed in SMART HR

To Stefanie Sylte

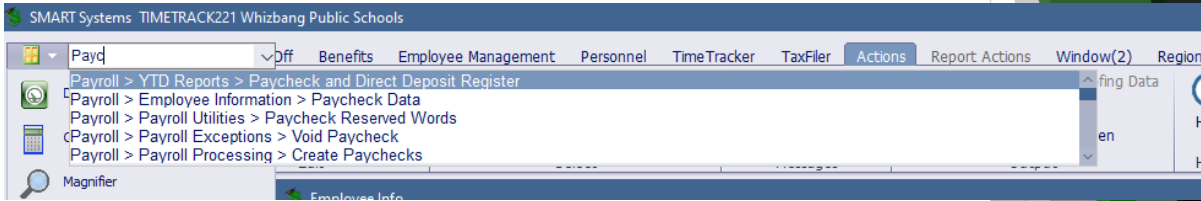
Aaron Aadams changed your address in SMART HR, effective immediately. If this change was not initiated by you, please contact the business office immediately.

This is a non-monitored email account. Please do not reply to this account.

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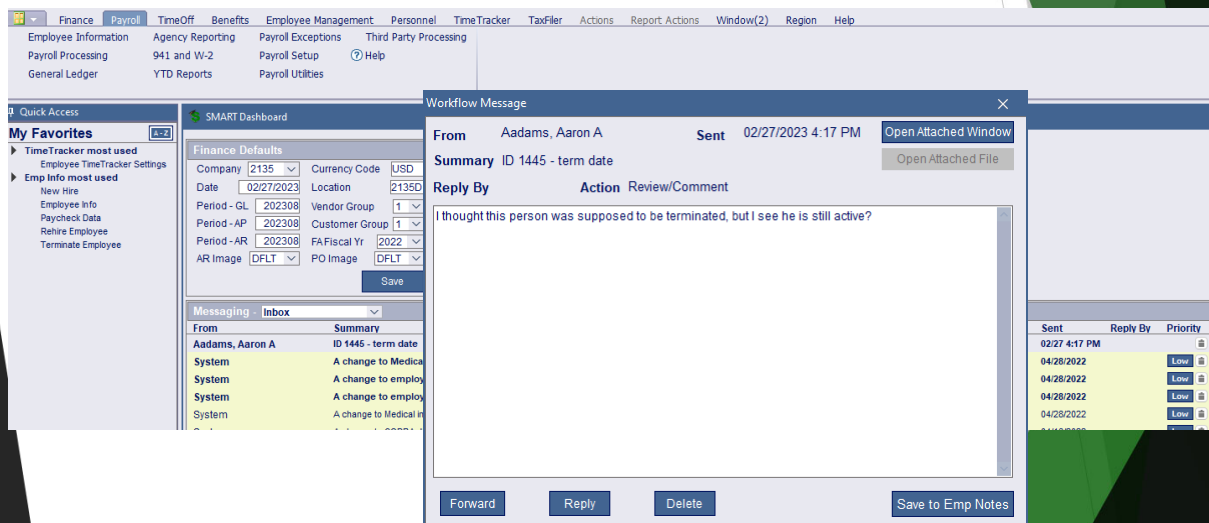


If you know the name of a window, but not where it is, you can search for it...

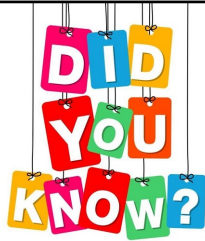


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If you need to check with someone about data in a window, you can message them in SMART?



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Employee Info-Addl can be mostly updated by employees themselves?

	Report/Web Page	Visibility	Allow Update	Allow Delete	Allow Insert	Set All To Yes
About Me						
Dependents	Web Page	Visible	No	No	No	<input type="checkbox"/>
Education	Web Page	Visible	No	No	No	<input type="checkbox"/>
Emergency Contacts	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Employee Information	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Immunizations	Web Page	Visible	No	No	No	<input type="checkbox"/>
Licensure	Web Page	Visible	No	No	No	<input type="checkbox"/>
Medical Exam Authorization	Web Page	Visible	Yes	No	Yes	<input type="checkbox"/>
Medical Information	Web Page	Not Visible	No	No	No	<input type="checkbox"/>
Safety Training	Web Page	Visible	No	No	No	<input type="checkbox"/>
Training, Tests & Skills	Web Page	Not Visible	No	No	No	<input type="checkbox"/>

Customizable by district

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And there is more...

	Report/Web Page	Visibility	Allow Update	Allow Delete	Allow Insert	Set All To Yes
My Payroll						
ACA Form 1095	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Contract Information	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Direct Deposit	Web Page	Not Visible	No	No	No	<input type="checkbox"/>
Fiscal Benefits Summary	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Flex Information	Web Page	Visible	No	No	No	<input type="checkbox"/>
Pay Information	Web Page	Not Visible	No	No	No	<input type="checkbox"/>
Pay Stub	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
TimeOff	Web Page	Visible	No	No	No	<input type="checkbox"/>
W-2	Web Page	Visible	No	No	No	<input type="checkbox"/>
W-2 Information Sheet	Web Page	Visible	No	No	No	<input type="checkbox"/>
W-4	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Wage Statement	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Year To Date Pay	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
My Requests						
Leave of Absence Request	Web Page	Not Visible	Yes	Yes	Yes	<input type="checkbox"/>
Online Shopping	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Order Requisition Entry	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Reimbursement Entry	Web Page	Visible	Yes	Yes	Yes	<input type="checkbox"/>
Vehicle Request	Web Page	Not Visible	Yes	Yes	Yes	<input type="checkbox"/>

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SMART eR Changes

SMART eR Changes Selection of IDs SMART eR Changed Rows

Selection of IDs

ID Address 1 Verified
 Last Name Address 2 Country Code
 First Name City Verified Comments
 Middle Name State Prov Code

Sort By: Name ID

Do Not Save All

Buttons: Show All, Adjust Values, Filter, Sort, Validate And Save

ID	Name	Changed	First	Middle	Last
1370	Chaney, Ida 1370	01/28/2022	Ida	1370	Chaney
	Address PO Box 1370				Changed By 1370
	Verified Comments				
	City Somewhere	State MN	Postal Code 12345-	Country US	
315	Hancock, Alexander 315	03/07/2023	Alexander	315	Hancock
	Address address				Changed By 315
	Verified Comments				
	City somewhere	State MN	Postal Code 55555-	Country US	

37

But maybe you are thinking but I want to know when someone changed something immediately...

SMART Communications | Setup Workflows

Setup Workflows

*Project SRA

Notifications Choose only one ID or user class per row

ID	Name	HR/Fin User Class	Start Date	Stop Date	Setting
		INJ&WC	03/01/2023	00/00/0000	eR_SRA_email

Page-tab Ref: Supervisor's Rpt of Accident

38

So how does it work?

Workflow Message

From: System

Summary: A SRA has been entered in SMART eR.

Reply By: [Blank]

Action: [Blank]

Employee Aguilar, Maryann 3 - 3797 ID# 3797, was injured. Supervisor is Adams, Aaron A - 206, ID# 206.

Buttons: Forward, Reply, Delete

Supervisor's Report of Accident

Select: Employee ID: 3797, Maryann 3797 Aguilar, AC: 40B22

Incident Date: 03/06/2023, **Time of Incident:** 08:00 AM

Supervisor's Report Of Accident * Required fields

Whizbang Public Schools

Employee ID and Name: 3797 Aguilar, Maryann 3797

Reported to: Adams, Aaron A

Date of report: 03/06/2023

Department: ALL

Date and Time of Incident: 03/06/2023 8:00 AM

Hours Lost on Date of Accident: 00

Job Title: [Blank]

Service with company: .50 Yrs in present job: .50

Did employee lose time from work? Yes No

Has Employee Returned To Work? Yes No

GIVE US YOUR HONEST COMMENTS ON QUESTIONS BELOW. WE ARE NOT TRYING TO BLAME ANYONE. YOUR OPINION MAY HELP US PREVENT ACCIDENT REPETITION.

- Was injured person properly instructed in safe and efficient methods? Yes No
- Did injured person violate any instructions? Yes No
- Was necessary protective equipment worn? (If applicable) Yes No
- Did poor housekeeping contribute to injury? Yes No
- Did horseplay cause the injury? Yes No
- Was it caused by something that needed repairs? Yes No
- Should a guard be provided? Yes No
- Did any bodily defect contribute to injury? Yes No
- Was it caused by an unsafe act? Yes No
- Did injured report the injury to you, the supervisor immediately? Yes No

* Accident. (Describe what injured was doing at time of accident, what happened, who was involved, nature of injury, part of body affected.)

fell on ice

Witness Name and Phone: [Blank]

Unsafe Acts (What did the employee or another person do incorrectly?): [Blank]

Unsafe Conditions (What unguarded or unsafe condition of machinery, equipment, building or premise was involved?): [Blank]

Actions Taken (What did you do to correct the conditions which caused this injury?): [Blank]

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Examples from the About Me menu group...

Finance Defaults

Company: 0727, Currency Code: USD

Date: 03/06/2023, Location: 004

Period - GL: 202309, Vendor Group: 1

Period - AP: 202309, Customer Group: 1

Period - AR: 202309, FA Fiscal Yr: 2023

AR Image: DFLT, PO Image: DFLT

Save

Messaging - Inbox

From	Summary	Sent	Reply By	Priority
System	A change to Safety Training information has been entered in SMART eR.	03/06 3:23 PM		Low
System	A change to Licensure information has been entered in SMART eR.	03/06 3:23 PM		Low
System	A change to employee information-Other has been entered in SMART eR.	03/06 3:23 PM		Low
System	A change to employee Contact information has been entered in SMART eR.	03/06 3:23 PM		Low
System	A change to address information has been entered in SMART eR.	03/06 3:23 PM		Low
System	A change to Emergency Contact information has been entered in SMART eR.	03/06 3:22 PM		Low
System	A change to COBRA dependent information has been entered in SMART eR.	03/06 3:22 PM		Low
System	A SRA has been entered in SMART eR	03/06 3:22 PM		High
Hancock, Alexander 315	I changed my direct deposit	03/06 8:06 AM		High

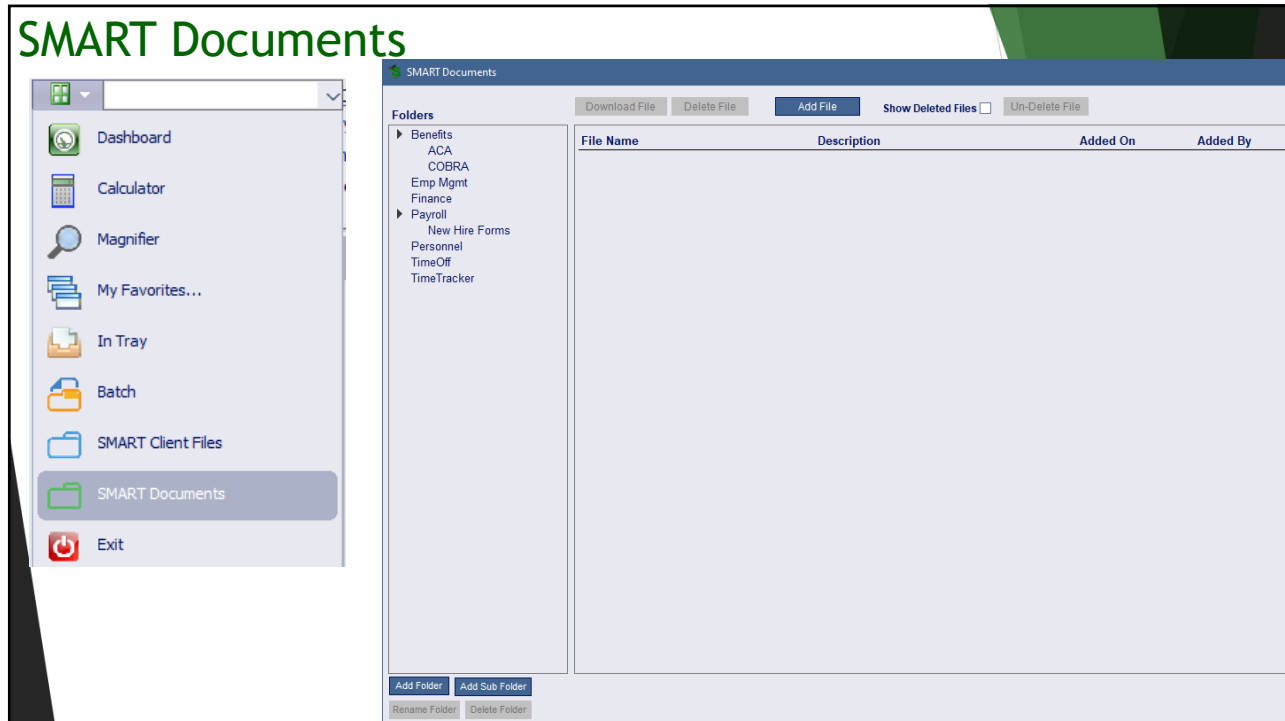
To Do List

Done	Description
<input type="checkbox"/>	low priority
<input type="checkbox"/>	med priority
<input type="checkbox"/>	high priority
<input type="checkbox"/>	no priority
<input type="checkbox"/>	due today

Add

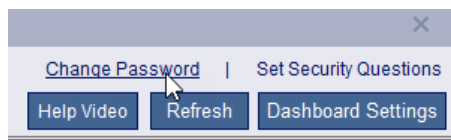
40

SMART Documents



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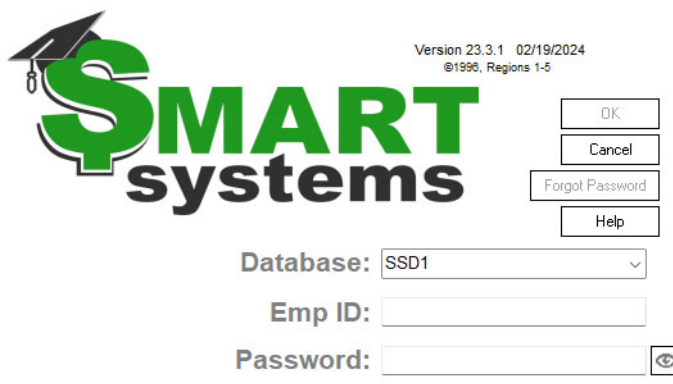
Want to change your password?



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MFA for SMART

SMART has a Multifactor Authentication code generation option, but will only send email codes. Login screen will still look the same:



Version 23.3.1 02/19/2024
©1996, Regions 1-5

SMART
systems

Database:

Emp ID:

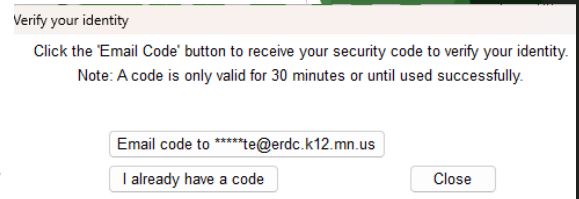
Password:

Buttons: OK, Cancel, Forgot Password, Help

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Process:

1. After entering your user id and password, if valid the following screen will display:



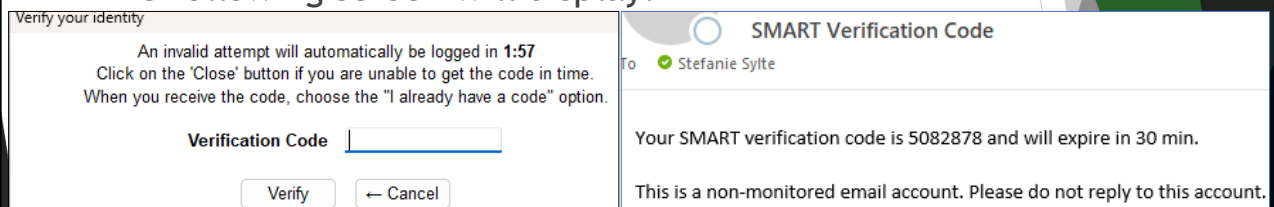
Verify your identity

Click the 'Email Code' button to receive your security code to verify your identity.
Note: A code is only valid for 30 minutes or until used successfully.

Email code to *****te@erdc.k12.mn.us

I already have a code Close

2. Click on the Email code to ... button.
The following screen will display:



Verify your identity

An invalid attempt will automatically be logged in 1:57
Click on the 'Close' button if you are unable to get the code in time.
When you receive the code, choose the "I already have a code" option.

Verification Code

Verify ← Cancel

SMART Verification Code

To: Stefanie Sylte

Your SMART verification code is 5082878 and will expire in 30 min.

This is a non-monitored email account. Please do not reply to this account.

3. Enter the code emailed and then click the Verify button.

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Employee Setup - SMART eR MFA Information

SMART eR MFA Information

Id	Employee Name	Date Changed	Location	Union	Mobile Phone	Email Pref	Home Email	Work Email
206	Aaron A Adams	01/01/1999	005			Nether		
1	Amos A Adams	01/01/1999	005			Nether		
100	Amy A Adams	01/01/1999	005			Nether		
14361	COLLEEN 14361 ABBOTT	11/11/2010	005		(098)765-4321	Nether		
10178	LILA 10178 ABBOTT	01/01/2019	005	BOARD	(098)765-4321	Nether		
15096	RONNIE 15096 ABBOTT	08/12/2019	110	10	(098)765-4321	Nether		
14403	WILMA 14403 ABBOTT	03/01/2011	005	10S	(098)765-4321	Nether		
11851	DERRICK 11851 ACEVEDO	07/06/2009	005	04A	(098)765-4321	Nether		
10714	CORY 10714 ACOSTA	07/10/2000	320	10	(098)765-4321	Nether		
15718	DOMINGO 15718 ACOSTA	08/12/2021	120	04				
15327	ANGELO 15327 ADKINS	12/14/2016	005	ROCK				
14254	LUKE 14254 ADKINS	07/01/2017	005	04S				
10502	MAUREEN 10502 ADKINS	08/25/1999	110	04				
14690	MYRON 14690 ADKINS	02/04/2013	005	04S				
14614	OWEN 14614 ADKINS	08/01/2012	005	SEASON				
14223	KATRINA 14223 AGUIRRE	01/27/2015	005	04S				
12956	LAVERNE 12956 AGUIRRE	04/10/1997	310					
14364	SHANNON 14364 AGUIRRE	11/01/2010	005					
14667	KATHRYN 14667 ALBERT	10/31/2012	005	04S				
12832	WILMA 12832 ALBERT	08/20/2004	130	04				

SMART eR MFA Information

Create Report

Retrieval Argument(s)	Value(s)	Wildcards
Primary Status	AC	<input type="checkbox"/>
Secondary Status		<input type="checkbox"/>
Location		<input type="checkbox"/>
Bargaining Unit		<input type="checkbox"/>
As Of Date		
Missing both MFA	Y	

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Payroll Setup - Setup New Hire/Rehire Templates

Setup New Hire/Rehire Templates

Select Employee Template: View Validation codes

Pay Codes | Pay Auth | Deductions | Distribution | Retirement | TimeOff Plans | Benefit Elig | Acct Code Perm | Permissions | Assignments

Pay Code	Start Date	Stop Date	Pay Base	Annual Contract	Nbr Pds	Earn Sched	Std Hrs	Pay Type	Changed By	Date Changed
TEACHER	09/01/2022	08/31/2023	0.00	0.00	24	T	000	01	206	3/3/2023

Double click Rate Table Box for Rate Information

Rate Table: TEACHERR | 42,220.00 | BA | 01 | * | *

Overrides: Hrs/Day: 8.000 | Days/Yr: 183.000 | Hrs/Yr: 1,464.000 | Paycheck Rate of Pay: 0.00 | Workers Comp: 8868

Notes:

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New Hire changes

The screenshot shows a 'New Hire' form with the following sections:

- Select:** Employee ID (input field), Transfer from Emp Mgmt (button)
- Employee Basic Information:** Social Security Card Info (First Name, Middle Name, Last Name, SSN, Birth Date, Age, Gender, Language, Privacy, Employee Type, PERA Number, TRA Number, SMART eRAccess, Federal Race and Ethnicity, Ethnicity, Race(s)).
- Status Info:** Primary Status, Secondary Status, Retire Status, Orig Hire Date, Adj Hire Date, Department, Job, Location, EEO Location, EEO Code, Check Location, Unemployment Location, TimeTracker Location, Exempt.
- Copy Payroll / Copy Emp Management / Copy TimeTracker:** ID to be copied (input field), Enter Start Dates (input field), Pay Codes, Deductions, Distribution, Pay Authorization, Retirement, Timeoff, Employee Template (dropdown menu), Start Date.

A red box highlights the 'OR Build defaults from Employee Templates' checkbox and the 'Employee Template' dropdown menu.

47

Earned Sick and Safe Time reinstatement warning...

Rehire Employee – If an employee is rehired within 180 days of the date they were terminated - that any ESST unused time would need to be reinstated.

Similar to ACA break in service warning we give – BUT this one is IF a district chooses to activate it.

48

Payroll Utilities - Cleanup Paycheck Data

Cleanup Paycheck Data

Tab Selection: Distribution Pay Code Stopped Rows Deduct Stopped Rows Pay Auth for TR Emps

Note: Reserved Word Regen needs to be run after changes to this window are complete to take effect.

Distribution Pay Code Stopped Rows Deduct Stopped Rows Pay Auth for TR Emps

Set all equal to Term Date Do Not Save All

ID	Name	Start Date	Stop Date	Term Date	Do Not Save
638817	ACOSTA, DARYL 638817	08/25/2014	00/00/0000	06/05/2019	<input type="checkbox"/>
535449	AGUIRRE, MITCHELL 535449	08/28/1985	00/00/0000	05/29/2020	<input type="checkbox"/>
112315	ATKINS, LORI 112315	01/30/2012	00/00/0000	05/27/2020	<input type="checkbox"/>
193344	AYALA, LAUREN 193344	03/02/1998	00/00/0000	05/29/2020	<input type="checkbox"/>
222737	BAIRD, CLAYTON 222737	09/08/2015	00/00/0000	08/26/2020	<input type="checkbox"/>
838964	BARKER, LUZ 838964	08/28/2000	00/00/0000	01/03/2020	<input type="checkbox"/>
439168	BARRERA, ROBIN 439168	09/03/1991	00/00/0000	01/08/2020	<input type="checkbox"/>
1087	BEACH, AUBREY 1087	08/01/2021	00/00/0000	01/30/2023	<input type="checkbox"/>
1147	BENDER, ESTHER 1147	10/18/2021	00/00/0000	01/30/2023	<input type="checkbox"/>

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General Ledger-Pay| Payroll/Finance Comparison

This report will compare Payroll to what Finance has

Payroll - General Ledger | Payroll / Finance Comparison

General Ledger

- Windows
 - Change to New Accounts
 - Correct Timecard Distribution
 - Create General Ledger Entries
 - Stop Invalid Account Codes
- Reports
 - Budget Information
 - Cash Activity
 - GL Benefits by Fund
 - GL Entries by Credit Account
 - GL Entries by Debit Account
 - GL Entries by Debit Account by Name
 - GL Entries by Debit Acct Summary
 - GL Entries by Employee
 - GL Gross Pay by Fund
 - GL Net Pay by Fund
 - GL Pivot Report
 - Liability Activity
 - Liability Credit
 - Liability Credit Summary - by Payee
 - MN SEDRA Reporting
 - Payroll / Finance Comparison
 - Salaries Payable Detail
 - Salary Distribution Detail

Payroll / Finance Comparison

Create Report

Retrieval Argument(s) Value(s)

Account Type * E

Begin Acct Date * 07/01/22

End Acct Date * 06/30/23

Source * SHR

Variance Total < 0.00 * N

Payroll / Finance Comparison

Begin Acct Date: 7/1/2021
End Acct Date: 6/30/2022
Source: SHR Acct Type: E - Debit

Calendar Account	Payroll Amount	Finance Amount	Variance
S2022010			
01-005-020-000-000-110	\$4,782.42	\$4,782.42	\$0.00
01-005-020-000-000-210	\$370.73	\$370.73	\$0.00
01-005-020-000-000-218	\$398.85	\$398.85	\$0.00
01-005-020-000-000-220	\$1,327.05	\$1,327.05	\$0.00
01-005-020-000-000-230	\$3.32	\$3.32	\$0.00
01-005-020-000-000-240	\$8.41	\$8.41	\$0.00
01-005-020-000-000-250	\$152.29	\$152.29	\$0.00
01-005-108-000-302-170	\$2,630.98	\$2,630.98	\$0.00
01-005-108-000-302-210	\$201.27	\$201.27	\$0.00
01-005-108-000-302-214	\$197.32	\$197.32	\$0.00
01-005-108-000-302-230	\$3.91	\$3.91	\$0.00
01-005-108-000-302-240	\$4.63	\$4.63	\$0.00
01-005-108-000-302-250	\$52.08	\$52.08	\$0.00
01-005-110-000-000-180	\$5,579.56	\$5,579.56	\$0.00
01-005-110-000-000-210	\$406.60	\$406.60	\$0.00
01-005-110-000-000-214	\$418.47	\$418.47	\$0.00
01-005-110-000-000-220	\$1,424.32	\$1,424.32	\$0.00
01-005-110-000-000-221	\$150.00	\$150.00	\$0.00
01-005-110-000-000-230	\$7.82	\$7.82	\$0.00
01-005-110-000-000-240	\$9.82	\$9.82	\$0.00
01-005-110-000-000-250	\$162.50	\$162.50	\$0.00
01-005-760-000-720-110	\$843.96	\$843.96	\$0.00
01-005-760-000-720-210	\$65.42	\$65.42	\$0.00
01-005-760-000-720-218	\$70.39	\$70.39	\$0.00
01-005-760-000-720-220	\$234.19	\$234.19	\$0.00
01-005-760-000-720-230	\$0.59	\$0.59	\$0.00
01-005-760-000-720-240	\$1.49	\$1.49	\$0.00
01-005-760-000-720-250	\$26.88	\$26.88	\$0.00

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Today's Agenda

- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

51

Coming Soon...

52

Earned Sick and Safe Time and Pay Stubs...

With the new Earned Sick and Safe Time Requirements: Earned and used TimeOff are required to be complete for Pay Stubs...

We will now be creating Snapshot data that will be static on Pay Stubs and Direct Deposit Notices in May.

53

Method of Pay: D-daily F-shift H-hourly N-not applicable R-route S-salary W-weekly

VOLUNTARY DEDUCTIONS			VOLUNTARY DEDUCTIONS			VOLUNTARY DE	
Desc	Current	Calendar YTD	Desc	Current	Calendar YTD	Desc	Current
Life Ins 2	\$.24	\$1.20					
PERA	\$63.27	\$316.35					

	GROSS	FED TAX	STATE TAX	MEDICARE	OASDI	VOL DEDUCTS	NET
Current	\$973.44	\$30.18	\$38.72	\$14.11	\$60.36	\$63.51	\$766.58
Calendar YTD	\$4,867.20	\$154.03	\$194.16	\$70.57	\$301.77		

TIMEOFF: Detail can be found in eRMy TimeOff					BENEFITS PAID ON YOUR BEHALF THIS PA	
Desc	Pay Period: Begin	Earned	Used	Available	Description	Current
Earned Sick and Safe T	1.4000	2.0000	.0000	3.4000	PERA Board	\$73.01
Personal Leave MSEA	14.0000	.0000	.0000	14.0000	Workers Comp Board	\$4.67
Sick Leave MSEA	65.0000	.0000	.0000	65.0000		

54

Do you have a big payroll?

Calculate Payroll is going to run faster, so you don't have to sit and wait...as long.

So will Create Paychecks...

55

Raw EEOC-EEO-5 data...

The screenshot shows a software interface for data extraction. At the top, there is a header bar with the text "EEOC-EEO5". Below this, there is a navigation bar with several buttons: "calendar that includes Oct 1: S202207", "P2", "P3 Top", "P3 Bottom", "Start Over", "OENUM Number", "Set OENUM", "Generate File", and "Finalize Report".

The main area is titled "Data Extraction" and contains a "Select" section with a "Report Name" dropdown menu set to "EEOC RAW DATA". Below this, there are tabs for "Report Description", "Create Report", "SQL Expert Mode", and "Report Results". The "SQL Expert Mode" tab is active, showing a SQL query:

```
--FULL TIME--
DECLARE @calendar AS VARCHAR(10) = '202307'

SELECT id,
       last_name,
       first_name,
       middle_name,
       sex,
       ethnic_hispanic_latino,
       race_am_indian_alaska,
       race_asian,
       race_black_african,
       race_hawaiian_pacific,
       race_white,
       current_status,
       secondary_status,
       eeo_code,
       eeo_location,
       report_type
FROM
(
  SELECT DISTINCT
    emp_basic_non_emp.id,
    last_name,
    first_name,
    middle_name,
    sex,
    ethnic_hispanic_latino,
    race_am_indian_alaska,
    race_asian,
    race_black_african.
```

At the bottom right of the SQL query area, there is a "Create Extract" button.

56

CRDC Civil Rights reporting...coming for 2023-2024 year data

Going back to the 2019 requirements...SMART will bring back all the old tabs...

What can I work on now?

1. *Pay Detail* must be setup including default school day values.
2. *Employee Licenses* are updated on Emp Info-Addl
3. It will be helpful to you if you track status changes now on separate rows...do not reuse the same one!

57

Examples of new requirements 23-24

Teachers and other Personnel (funded with federal, state, and/or local funds)

Number of FTE teachers (preschool-12).

Number of FTE of teachers (preschool-12) meeting all state licensing/certification requirements.

Number of FTE of teachers (preschool-12) not meeting all state licensing/certification requirements.

Number of FTE teachers (preschool-12) certified/licensed/endorsed in specified areas (mathematics, science, English as a second language, special education).

Number of FTE first-year teachers (preschool-12).

Number of FTE second-year teachers (preschool-12).

Number of FTE teachers (preschool-12) absent more than 10 school days.

Number of teachers (preschool-12) employed at the school during the 2023–24 regular school year (disaggregated by race, sex).

Number of teachers (preschool-12) employed at the school during both the 2022–23 regular school year and the 2023–24 regular school year.

Number of FTE school counselors.

Number of FTE psychologists.

Number of FTE social workers.

Number of FTE nurses.

Number of FTE security guards.

Number of FTE law enforcement officers (including school resource officers).

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Questions?

