SMART HR

Stefanie Sylte

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

5

Agency|Periodic|
PERA Annual Leave Reporting

▶ Fiscal year basis - Due for schools on July 31, 2024

Mnpera.org -> Annual Leave Q&A

6
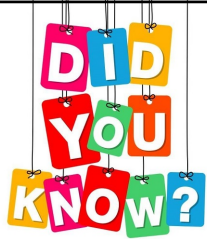
For plan years starting in 2024 the ACA affordability percentage is 8.39%.

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)

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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!

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Wage Statements –TimeOff now includes HrsWorked plans

10

Wage Statement Signatures tracking

11

Agency|Periodic|Flex Nondiscrimination Test

12

Agency | Periodic | PERA GASB Audit

13

Agency | Periodic | TRA Audit for State Auditor

14

Agency|Periodic|Inactivate eR W2 due to W2C

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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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Random Reminders

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Did anyone notice the menus changed?

SMART Systems SSD5 Whizbang Public Schools

Finance   Payroll   Agency   HR   TimeTracker   Actions   Report Actions   Window(1)   Help
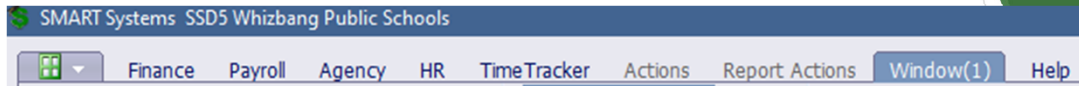
Does anyone remember from last year's conference why?

| Finance | Payroll | Agency | HR | TimeTracker | Actions | Report Actions | Window(1) | Help |

| --- | --- | --- | --- |
Personnel	Leaves and Non-Renewals	Assignments	SMART Communications ? Help
Education, Training and License	Career Planning	Assignment Setup	Emp Mgmt Utilities
Retiree and COBRA Insurance	Medical and Wellness	Permissions	Benefit Tracking

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DID YOU KNOW?
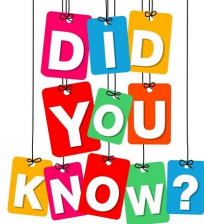
The Webpage menu icon will take you directly to websites...
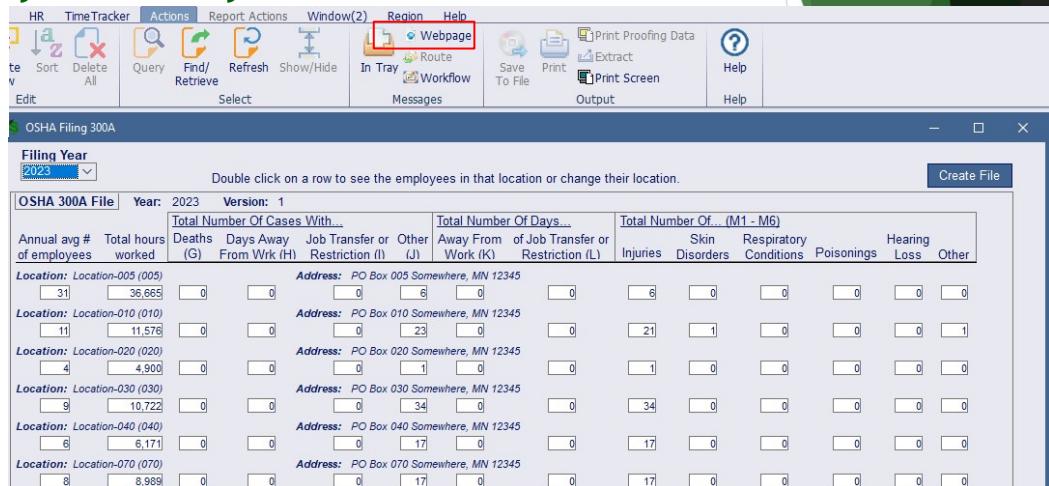
Also on STAR reporting, New Hire reporting, PERA/TRA reporting, Unemployment and MDE to get licenses.

20

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:

22

District Forms

		Description	Note	Created Date	Form Type	Form Category	Date/Time Signed
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	HIPPAA 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

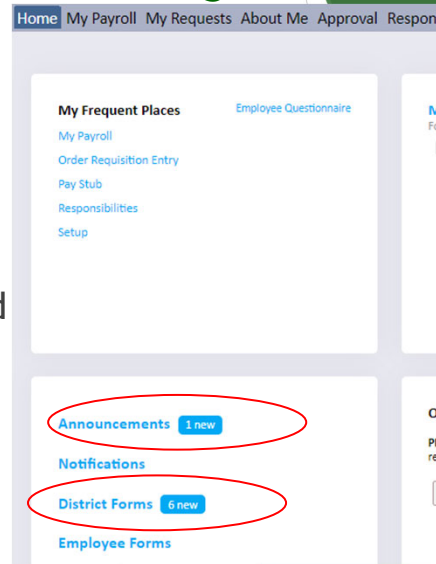| Announcements	(661) Notifications	(6) District Forms	(1) Employee Forms

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

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SMART Dashboard will now have a message:

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Employee notes:

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

28

Public vs Private Retrieval Arguments

29

Help screens

Menu Group   Window

30

Folders can be built in Employee Notes

Folders are automatically setup for all employees

31

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.

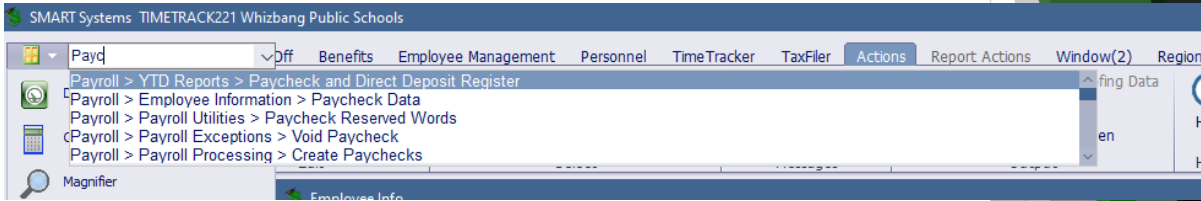This is a non-monitored email account. Please do not reply to this account.

32
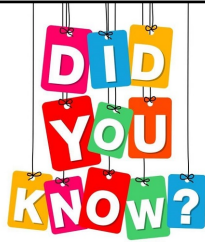
If you know the name of a window, but not where it is, you can search for it…

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If you need to check with someone about data in a window, you can message them in SMART?
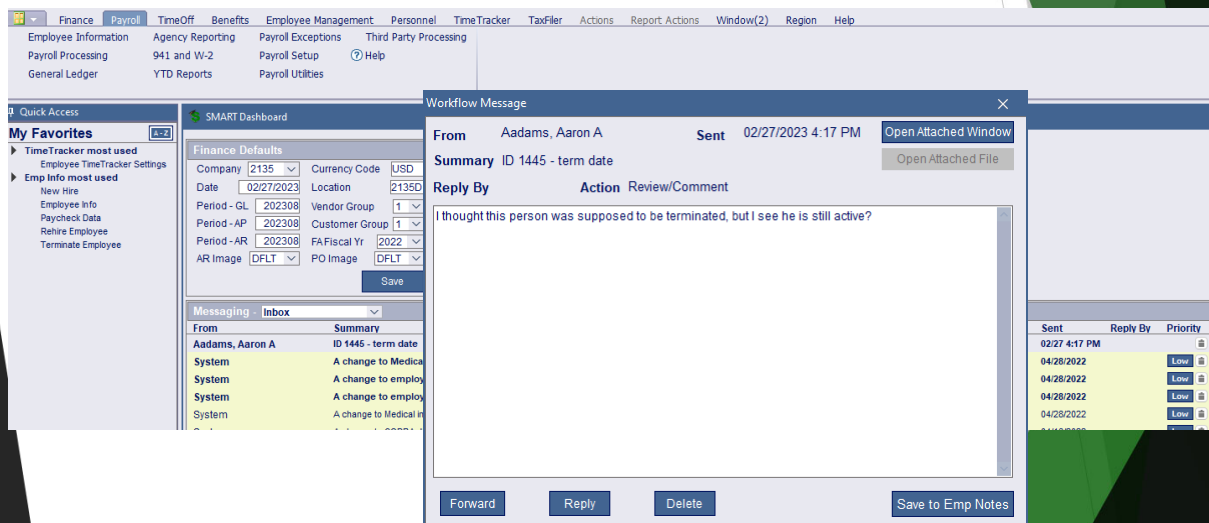
34
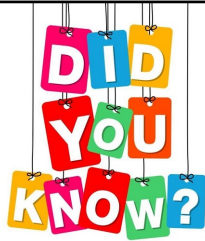
Employee Info-Addl can be mostly updated by employees themselves?

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

Customizable by district

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And there is more...

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

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SMART eR Changes

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

SMART Communications | Setup Workflows

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So how does it work?

Workflow Message

From: System Sen
Summary: A SRA has been entered in SMART e
Reply By Action

Employee Aguilar, Maryann 3 - 3797 ID# 3797, was i
supervisor is Aadams, Aaron A - 206, ID# 206.

Finance
Compan
Date
Period -
Period -
Period -
AR Imag

Messag
From
System
System
System
System
System
System
System
System
Hancock

Forward | Reply | Delete

Supervisor's Report of Accident

Select
Employee ID 3797 Maryann 3797 Aguilar AC 40B22
Orig Hire Date 9/6/2022 Adj Hire Date 9/6/2022
Incident Date 03/06/2023 Time of Incident 08:00 ○ AM ○ PM
Note: Standard time only format: 01:00. Military not accepted.

NOTES | Print

Supervisor's Report Of Accident *Required fields Whizbang Public Schools

EVERY ACCIDENT SHOULD BE INVESTIGATED AND THE CAUSES CORRECTED SO THAT MORE ACCIDENTS WILL NOT OCCUR. DO NOT OVERLOOK THE SO-CALLED "UNIMPORTANT" CASES, BECAUSE, EXCEPT FOR "CHANCE" THEY COULD ALSO HAVE BEEN SERIOUS. IT IS ONLY BY THOROUGH INVESTIGATION THAT MANY OF THE REAL CAUSES CAN BE DETERMINED AND CORRECTED.

Employee ID and Name 3797 Aguilar, Maryann 3797
*Reported to 206 Aadams, 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 ___
*Did employee lose time from work? ○ Yes ○ No
*Has Employee Returned To Work? ○ Yes ○ No
Service with company .50 Yrs in present job .50

GIVE US YOUR HONEST COMMENTS ON QUESTIONS BELOW. WE ARE NOT TRYING TO BLAME ANYONE. YOUR OPINION MAY HELP US PREVENT ACCIDENT REPETITION.
* ○ Yes ○ No 1. Was injured person properly instructed in safe and efficient methods?
* ○ No ○ Yes 2. Did injured person violate any instructions?
* ○ Yes ○ No 3. Was necessary protective equipment worn? (If applicable)
* ○ No ○ Yes 4. Did poor housekeeping contribute to injury?
* ○ No ○ Yes 5. Did horseplay cause the injury?
* ○ No ○ Yes 6. Was it caused by something that needed repairs?
* ○ No ○ Yes 7. Should a guard be provided?
* ○ No ○ Yes 8. Did any bodily defect contribute to injury?
* ○ No ○ Yes 9. Was it caused by an unsafe act?
* ○ Yes ○ No 10. Did injured report the injury to you, the supervisor immediately?

*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 ___ ( ) -
Unsafe Acts (What did the employee or another person do incorrectly?)

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

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

Change
Help Vid

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Examples from the About Me menu group...

SMART Dashboard

Change
Help Vid

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 New

| 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

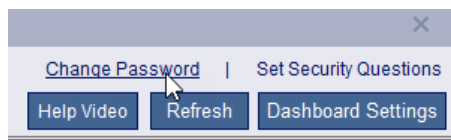| Done	Description
☐ +	low priority
☐ +	med priority
☐ +	high priority
☐ +	no priority
☐ +	due today

Add

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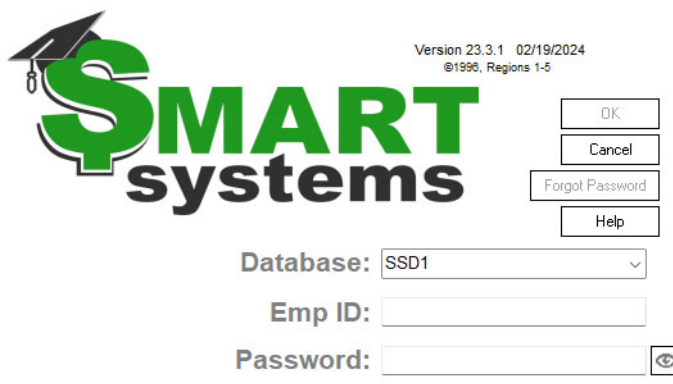## SMART Documents
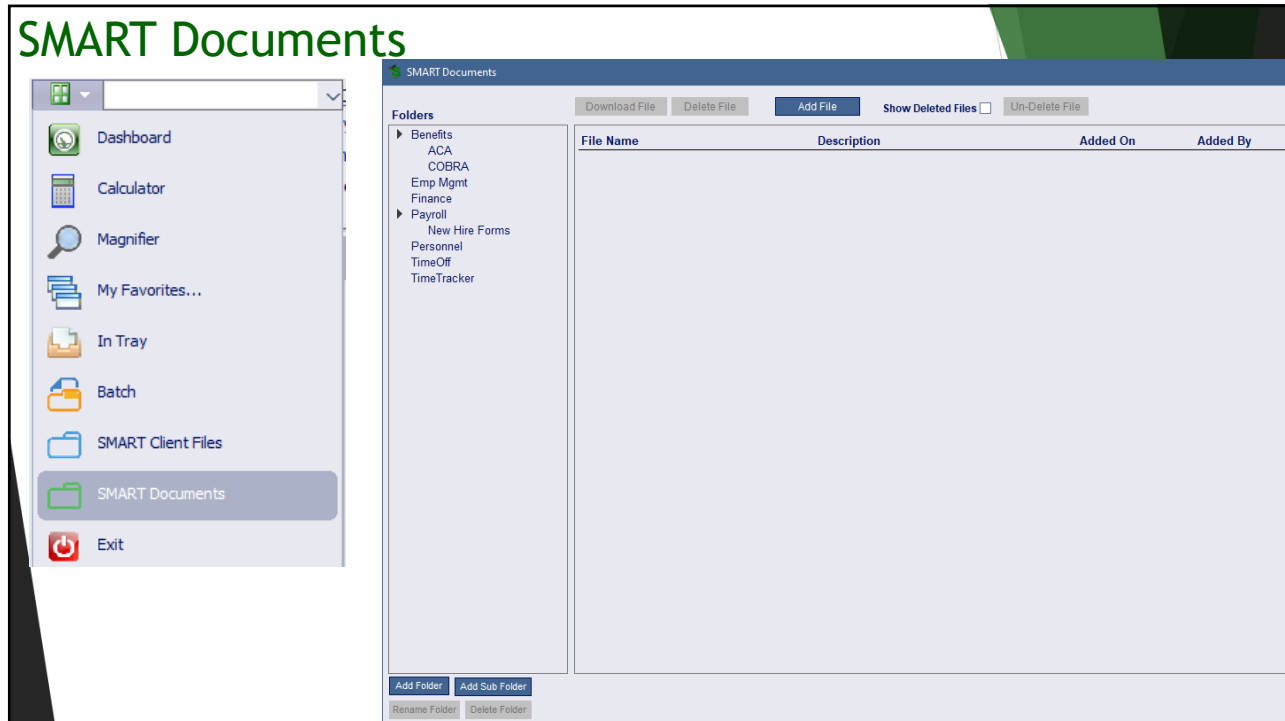
41

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:
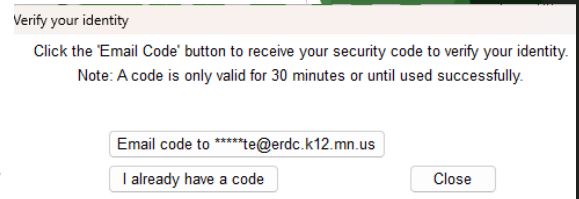
43

Process:

1. After entering your user id and password, if valid the following screen will display:
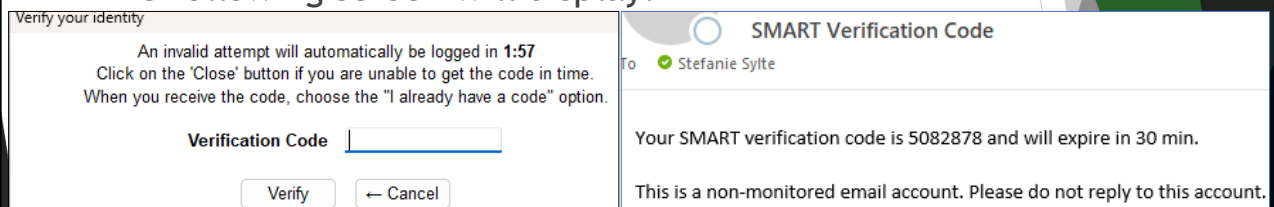
2. Click on the Email code to ... button.
   The following screen will display:

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

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Employee Setup - SMART eR MFA Information

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Payroll Setup - Setup New Hire/Rehire Templates

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New Hire changes

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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.

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Payroll Utilities - Cleanup Paycheck Data

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General Ledger–Pay|Payroll/Finance Comparison

This report will compare Payroll to what Finance has

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Coming Soon...

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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.

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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	$766.5
Calendar YTD	$4,867.20	$154.03	$194.16	$70.57	$301.77		

TIMEOFF: Detail can be found in eR|My TimeOff

BENEFITS PAID ON YOUR BEHALF THIS PA

Desc	Pay Period: Begin	Earned	Used	Available	Description	Current	C
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			

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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…

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CRDC Civil Rights reporting...co*ming 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!

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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?

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