SMART eR
and
Employee Self Service

SMART Systems

SMARTeR

Region V Spring Conference
April 2014
Contents

Logging into SMART eR ...........................................................................................................................................3
SMART eR Menu Items Defined ...............................................................................................................................6
  Announcements and District Forms ..........................................................................................................................6
  Pay and Personal Information ...............................................................................................................................6
  Requests and Approvals .......................................................................................................................................13
  Reports ..................................................................................................................................................................15
    Running Reports ...............................................................................................................................................15
    Setting Report Defaults ....................................................................................................................................17
Reports Overview .....................................................................................................................................................18
  Employee Information ..........................................................................................................................................18
  Employee Credential ............................................................................................................................................18
  Pay ........................................................................................................................................................................19
  Seniority ...............................................................................................................................................................21
  Financial ...............................................................................................................................................................22
Other .........................................................................................................................................................................24
  Logo ......................................................................................................................................................................24
  District Attachments .............................................................................................................................................24
Printing and Saving Reports .....................................................................................................................................25
Setting Up A User List .............................................................................................................................................26
SMART eR / ESS User Guides on Region V Website .............................................................................................26
Logging into SMART eR

For new employees and employees who have never logged into SMART eR, the user ID is the employee ID as it is in SMART HR/Finance and the Password is the District ID number plus the last 4 digits of the employee’s social security number (no spaces).

Once logged in employees are required to change their password and setup a minimum of three (3) question choices.

- Password: The new password cannot be the same as your old password and must be a minimum of eight (8) characters in length and must contain at least one upper case letter, one lower case letter, one number and one symbol (e.g. John1deere$ or Smart#1234).

- Security Question: The security question will allow the employee to use the “forget password” link to reset their password should they forget it. Users will have the option to select predefined questions, type in customized questions, or a combination of both.

The system will randomly choose one question from this list of questions for the user to verify at time of login. If answered correctly the user will be logged in. If incorrect, an additional two tries will be provided before the account is locked for account safety. The user would then have to contact the appropriate district staff to have the lock removed in SMART HR.
Please make sure Javascript is enabled for your browser for SMART eR to work correctly in IE 10 & 11. You will get the following screen:

After successfully entering a login id and password, the system will redirect to a new security setup page. All fields with a colored background need to be entered in order for the page to save.
When your changes have been saved successfully, the following message will display.

![Success message]

Click “OK”, and re-login using the new password. It will then display a security question.

![Security question]

Enter an answer correctly and the system will finish logging in.

**Note:**

1. If you are locked out and have security questions setup – You can use the **Forgot Password** link to reset your password. You will be asked to answer one of your security questions.
2. If you provide the correct User ID and Password, but forgot the answer to your security question – Close out of SMART eR and re-login. This will trigger a new security question.
3. You have 3 attempts to login successfully before you are locked out. If you have 2 invalid attempts to get in and then successfully submit your username and password, you will have 3 attempts to answer your security question before you are locked out.

Security Questions and Password can always be maintained or changed from **My Profile** in the **Pay and Personal Information** (menus may look differently depending on individual employee permissions):
SMART eR Menu Items Defined

Announcements and District Forms

Announcements and/or District Forms that have been electronically sent to the employee(s) will be visible once the employee has logged into SMART eR / Employee Self Service (ESS).

Pay and Personal Information

Pay and Personal Information is available to all employees. This allows the employee to view their personal information. The district also has the option of allowing employees to update information online such as addresses, phone numbers, email addresses, dependents, emergency contacts, licensure and training. This will then update the information in the SMART database.
My Pay tab allows the employee to view their current and past paystubs and also their year-to-date pay (by calendar year). Contract information can be viewed under the Pay Information selection.

**My Pay > Pay Stub:**

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,185.31</td>
<td>Year to Date Pay</td>
</tr>
<tr>
<td>$2,105.41</td>
<td>Total</td>
</tr>
<tr>
<td>$2,191.38</td>
<td>Total</td>
</tr>
<tr>
<td>$493.39</td>
<td>Total</td>
</tr>
<tr>
<td>$166.05</td>
<td>Total</td>
</tr>
<tr>
<td>$2,225.02</td>
<td>Total</td>
</tr>
<tr>
<td>$303.65</td>
<td>Total</td>
</tr>
<tr>
<td>$44.75</td>
<td>Deductions</td>
</tr>
<tr>
<td>$52.53</td>
<td>Deductions</td>
</tr>
<tr>
<td>$50.00</td>
<td>Deductions</td>
</tr>
<tr>
<td>$303.65</td>
<td>Deductions</td>
</tr>
<tr>
<td>$2,297.07</td>
<td>Deductions</td>
</tr>
<tr>
<td>$1,973.72</td>
<td>Deductions</td>
</tr>
<tr>
<td>$2,297.07</td>
<td>Deductions</td>
</tr>
<tr>
<td>$3,137.92</td>
<td>Deductions</td>
</tr>
<tr>
<td>$494.01</td>
<td>Deductions</td>
</tr>
<tr>
<td>$50.00</td>
<td>Deductions</td>
</tr>
<tr>
<td>$196.78</td>
<td>Deductions</td>
</tr>
<tr>
<td>$128.43</td>
<td>Deductions</td>
</tr>
<tr>
<td>$554.72</td>
<td>Deductions</td>
</tr>
</tbody>
</table>

**My Pay > Year to Date Pay:**

KEVIN BULLOCK
Year: 2014 * Earnings through 03/14/2014

- After School Program: $770.11
- Teacher Contract: $7,774.74
- Staff Development-Hourly: $160.05
  
  Total: $9,004.90

- Deductions: $1,087.95

-- Deductions: $134.10
-- Deductions: $187.30
-- Deductions: $638.35
-- Deductions: $150.00
  
  Total: $1,087.95

- Benefits: $150.00

-- Benefits: $150.00

- Taxes: $1,531.40

-- Taxes: $747.72
-- Taxes: $124.99
-- Taxes: $345.01
-- Taxes: $534.46
  
  Total: $1,753.18
My Pay > Pay Information:

Notice of Assignments for the 2013-2014 School Year.
Your Salary for the 2013-2014 school year for basic services is:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Stop Date</th>
<th>Pay Code</th>
<th>Lane</th>
<th>Step</th>
<th>FTE</th>
<th>Unit PD Amount</th>
<th>Contract Annual Amount</th>
<th>Hrs/Day</th>
<th>Day/yr</th>
<th>Hrs/Yr</th>
<th>Contract Hourly Rate</th>
<th>Contract Daily Rate</th>
<th>Unit PD Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/01/2013</td>
<td></td>
<td>TRADEC</td>
<td>MA</td>
<td>11</td>
<td>1.0000</td>
<td>$0.00</td>
<td>$62,108.00</td>
<td>0</td>
<td>193</td>
<td>1,158</td>
<td>$53.71</td>
<td>$322.27</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

My Pay > Direct Deposit:

New this year: Districts can allow an employee to change their amounts allocated to their bank account(s). It will allow a district to choose how many accounts each employee can enter if they desire. It will not be active until it is signed by the employee and then moved into payroll through a batch job which is scheduled to run once a day.
**My Benefits** tab allows the employee to view TimeOff activity, TimeOff balances and Flex Reimbursement information (if reimbursements are done in-house).

**My Benefits > TimeOff:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Begin Balance</th>
<th>Usage</th>
<th>Accrual</th>
<th>Available</th>
<th>New Year Lost</th>
<th>Accrual Lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2013</td>
<td>Beginning balance</td>
<td>38.83</td>
<td></td>
<td>38.83</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/1/2013</td>
<td>Accrual</td>
<td>10.00</td>
<td>49.83</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/21/2013</td>
<td>Personal/Farm Illness</td>
<td>1.00</td>
<td>47.83</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Summary</strong></td>
<td></td>
<td><strong>38.83</strong></td>
<td>1.00</td>
<td><strong>47.83</strong></td>
<td></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>

There is also an option to request a **Leave of Absence** online. This type of leave includes Maternity or Child Care, Extended Leaves, Military, and Sabbatical leaves of absence. An automatic email notification is sent to the designated person on staff who receives these types of requests.

**My Benefits > Leave of Absence Request:**

**My Tax Information** tab allows the employee to view what is currently being claimed for tax withholding based on their completed Form W-4. The Form W-2 and W-2 Information sheet is also found here. If the employee has not consented to receiving the W-2 electronically the option to view or print their W-2 is not available. Once the user has consented to an electronic W-2 both current and prior years can be viewed.

**My Tax Information:**
**New this year:** Districts can allow an employee to change their W-4 withholding amounts for both federal and state reporting. It will not be active until it is signed by the employee and then moved into payroll through a batch job which is scheduled to run once a day.

About Me tab contains the employee’s personal information, emergency contacts and dependent information. The district has the option of allowing the employees to make changes to this information.

**About Me > Employee Information:**

**About Me > Emergency Contacts:**

**About Me > Dependents:**
My Credentials tab includes education, licensure, training, tests and skills information. The district has the option of allowing the employees to make changes to this information. License information is listed with expiration dates. A link to the MDE website is provided so the employee can view their record on file with the State of Minnesota. Assignments are listed under the No Child Left Behind area as reported to the MDE through STAR Reporting.

My Credentials > Education:

My Credentials > Education > Continuing Education: (e.g. Lane Changes)

My Credentials > Licensure > Teaching Licenses:

My Credentials > Licensure > Other Licenses/Certifications: (e.g. Asbestos Certification, Boiler License, CPR certificate, Driver’s License, Occupational Therapist, Registered Nurse)
My Credentials > No Child Left Behind:

![No Child Left Behind](image)

My Credentials > Training, Tests & Skills: (e.g. Sexual Harassment, Bloodborne Pathogen, OSHA and EPA trainings, PRAXIS tests, Foreign Language skills)

![Training, Tests & Skills](image)

My Profile tab allows the employee to change their password and security question.

My Profile > Change Password allows the employee to change their current password.

My Profile > Setup Security Questions: The employee can select one of the predefined questions or choose one or more of the first three options and enter their own questions. Three (3) security questions are required.
Requests and Approvals

Requests and Approvals can be limited to specific employees through secured access. Region V will set up user access based on the request made by the district administration. The Requests and Approvals group include Purchasing, Vehicles, and Responsibilities (e.g. Supervisor’s Report of Accident) with specific items listed in drop down boxes.

Purchasing tab allows non-SMART Finance users to enter purchasing information. SMART eR currently offers two different methods for users to request and/or place orders that transfer into SMART Finance.

The first method is Online Ordering for specific outside vendors via a “punch-out” system. The second method is the “Online Order Request” which allows staff to create an order request to be transferred into SMART Finance for requisition or purchase order processing.

**Purchasing:**

Vehicles tab is the Transportation Module that allows the district to track vehicle usage, calculate mileage for each vehicle, create journal entries for the use of the vehicle and track maintenance of each vehicle.

**Vehicles:**
Responsibilities tab allows those with access to enter a supervisor’s report of accident and to send announcements to employees. The ability to manage employee contracts and notices of assignments will be available in an upcoming release.

Responsibilities:

> **Supervisor’s Report of Accident:**

The Supervisor’s Report of Accident (SRA) is used to notify the district office of an injury so the remaining documents can be completed for Workman’s Comp. Supervisors can be given access to this window to complete the form. A confirmation email will be sent to a designated person to let them know that an SRA has been completed. The information from the SRA will auto-populate the First Report of Injury (FROI) report in SMART HR. The SRA is often used by the Worker’s Comp Company to investigate a claim.

Responsibilities > Supervisor’s Report of Accident:

The Employee Announcements window is used to send Announcements electronically to users of SMART eR. Announcements can be sent to all employees or criteria can be selected to target specific employees based on location, union, deduction code, etc.

Responsibilities > Employee Announcements:
The **Property Assignment** window is used to record property that has been assigned to employees, as well as track the dates when the property was issued and returned. Examples of items recorded here include iPads, computers, credit cards and district keys.

**Responsibilities > Property Assignment:**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Type</th>
<th>Property ID</th>
<th>Location</th>
<th>Issue Date</th>
<th>Return Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABBOTT, CAMILLE</td>
<td>PC</td>
<td>123456789</td>
<td>005</td>
<td>02/03/2014</td>
<td>02/03/2014</td>
<td>iPad for Staff Development Mk3</td>
</tr>
</tbody>
</table>

### Reports

SMART eR has several different reports available. Security access can be given to specific employees to run reports. This option provides access to the information needed and alleviates the need for an individual to have a login/password to the software itself. The information in these reports is retrieved ‘real time’ from the SMART Systems database. The user is able to set up **Report Defaults** for frequently used reports. The information can also be saved to an **Excel** file.

#### Running Reports

1. To run a report in eR use the drop down list box to select the report to run.

2. Select the Values you would like to include in the report and click on the **Find** button to retrieve the information. You can also key the information into the field if you know the value(s) for the field.
3. Once the selections have been made, use the arrows (<<<) to ‘move’ the information into the **Value** field. Continue with each **Value** based on the information that is needed for the report. An * indicates a required field. The more selections made, the more specific the information displayed on the report will be.

4. When finished with your selections, click the **Run Report** button to create the report.

5. To change the selection criteria and run the report again, click the **Change Report Parameters** link.
Setting Report Defaults

The defaults that are chosen to run a report can be saved. This allows the user to save multiple sets of retrieval arguments for a particular report. The next time the report is run the employee can select a Report Name from the Report Default box and all of the defaults will automatically fill in versus selecting the values one at a time each time the report is run.

To set defaults, select the Value(s) that you would like included in the report. Under Report Defaults, type in a name for the report in the Save As box.

Once the Save As button is clicked the report will save in the Report Defaults area and be available for future report requests. The next time you want to run the report, go to Report Defaults and click on the name of the saved report. The values will automatically populate the Value field with the specified criteria.
Reports Overview

Employee Information

Employee Information reports include emergency contact list, employee address information, employees on leave of absence, property assigned to employees (laptop, cell phones, keys, etc.) telephone and email directories, and TimeOff Activity and Summary reports.

Employee Credential

Employee Credential section reports training, tests and skills that the employee has. Online reports include employee training, continuing education, employee licensure, skills, tests and NCLB information. OSHA, EPA, PRAXIS, PARA PRO test results and Foreign Language skills can be entered and viewed in this area.

License information for current staff is also viewed in this area along with continuing education credits that pertain to Lane Changes. Reports also provide other licenses or certifications for areas such as Food & Nutrition Service Certified, Commercial Driver License – School Bus, Licensed Practical Nurse, and Psychologist.
Pay

Pay reports include:

- **Employee Distribution** – this report shows how an employee’s pay is distributed based on their assigned UFARS account code(s).

- **Employee Pay Detail** – this report displays detailed pay information including FTE, salary, rates of pay, steps and lanes, days per year, hours per day and annual hours.

- **W-2 forms** are available for several calendar years and allow district office staff to request the data online via electronic format for all employees thus eliminating the need to store paper copies. The district office staff can also re-print a tax form for an employee if requested.

- **W-4 forms** are also available. District staff can access several years online similar to the W-2 forms above. These reports will retrieve the employee’s federal and state W4s. Reports are only available for W4 forms entered online by the employee.

**Employee Distribution**

This report shows the pay distribution by employee as it is setup in the Payroll system. The report can be requested by employee, union, location, distribution code (Cost Center), pay code and date range. This report can be printed or saved to an Excel file.

*(Note: Directions for saving reports to Excel are included at the end of this document.)*
**Employee Pay Detail**

The Employee Pay Detail report includes information such as Step and Lane, FTE, annual contract amounts, daily and hourly rate, hours per day and year, and days per year. The report has a number of options by which it can be requested; by employee, union, location, pay code, fiscal year, FTE, step and lane, hours per day, days per year and date range. The report can be saved to an Excel spreadsheet for data analysis or used in a merged document to create Letters of Assignment.
Seniority

Seniority reports include a seniority list, a seniority report with licensure by adjusted hire date, and a seniority report with licensure by seniority date. These reports can be requested by employee, union, location, license code, and date.

**Seniority Listing Report**

This report shows the employee’s service in service months along with the seniority date, adjusted and original hire date.

**Seniority with Lic by Adj Hire Date**

This report lists the seniority by adjusted hire date. The license information and expiration dates are also displayed on the report. The Seniority with Lic by Seniority Date displays the same information except it is sorted by seniority date versus adjusted hire date. It includes a seniority code field which can be used to record information to determine seniority in the event of a tie breaker.
Financial reports include the following payroll reports: FTE Cost by Lane report and the GL Entries by Debit Account Summary.

**FTE Cost By Lane**

This report shows total FTE and salary by location. The report displays FTE, lane, step and contract amount for an employee. The report subtotals by lane and step, with a total by location, and a grand total at the end of the report. The report can be saved to an Excel spreadsheet for data analysis.
Pay / Benefits by Debit Account Summary

This report can be requested by employee, distribution code (Debit Account), pay and/or benefit codes, the payroll calendar (Cal/Cal Seq), fiscal year and labor flag. The Labor Flag allows you to select pay and/or benefits. To request this report for all labor flags leave this field blank. To request this report for only “pay” information, enter a ‘P’ in this field. The report returns the detail by distribution code and totals the dollar amounts by distribution code.

- Debit Account = UFARS 17-Digit Account Code
- Cal/Cal Seq(s) = Payroll Calendar (date)
Other

Security access limits this menu item to specified employees. This screen allows you to store your district logo if you would like it displayed at the top of the SMART eR page. This window also allows an attachment to be added to SMART eR to be viewed and/or accessed by employees.

Logo

District Attachments

This option allows districts to attach their own “District” specific forms for easier accessibility. This eliminates sending paper forms via other methods. Following are examples of forms that can be attached; Master Agreements, Direct Deposit form, Flex Election forms, Insurance Change forms, W4 form, Expense Reimbursement forms, Employee Handbook.
Printing and Saving Reports

Once a report is created it can be printed or saved as an Excel or PDF file.

Printing the Report:

Print the report by clicking on the Printer Icon.

A pop-up box will ask if you would like to open or save the report. To print the report select Open. To save the report select Save. It can be printed or saved in a PDF format.

Saving the Report as Excel:

Select Excel from the drop down list box, then click the Export button. When the pop-up box appears click Open to view the information or click Save to save the Excel spreadsheet.
Setting Up A User List

The User List allows employees to mark their favorites in SMART eR / ESS so they can easily select the windows they frequently visit (similar to bookmarking a page). To setup your own User List or “favorites” open a window and then click on the Add button.

Note: You will need to be on the specific page to add it to your User List in order for SMART eR to know which one to add. Once added, you will be allowed to delete pages if you no longer want them included in your User List.

SMART eR / ESS User Guides on Region V Website

SMART eR / ESS User Guides are available on the Region V Website. To locate the guides, click on DOWNLOADS and scroll down to the section labeled SMART HR. There are two guides; an administrator guide and an employee guide.

- SMART eR ESS Admin Training Guideline
- SMART eR ESS Guideline

The administrator guide is for employees who have additional access rights to SMART eR and need to know how to run reports or access areas such as the Supervisor’s Report of Accident. The employee guide is intended for the employee. Its purpose is to assist them in locating their pay and personal information, in addition to announcements and district forms.

http://www.regionv.k12.mn.us/