



SMART HR

Stefanie Sylte

SMART Systems Development

Recording of this presentation on a device with AI is NOT allowed!

Copies of slides will be available from the Region after the presentation.

Today's Agenda

- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

Mandatory Reminders

Agency | Periodic | PERA Annual Leave Reporting

PERA Annual Leave Reporting

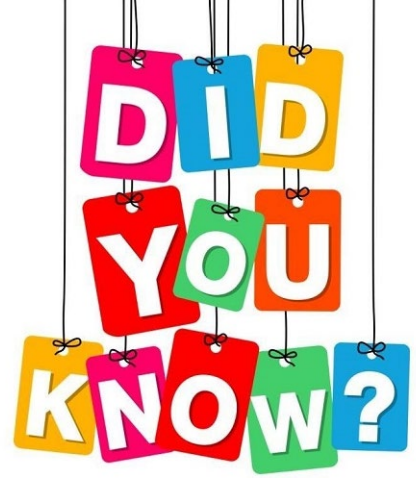
Adjustment Finalize

Fiscal Year: 2023 Sort: Id Name Leave Reason Do Not Send All [Generate Finalized Data](#)

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, MAMIE 881614	Family Leave	05/25/2023	05/30/2023	\$.00	.00		<input type="checkbox"/>

► Fiscal year basis - Due for schools on July 31, 2025

Mnpera.org -> Annual Leave Q&A



For plan years starting in 2025 the
ACA affordability percentage is 9.02%.

Jan renew plan affordability amount =

\$113.20 ($15060 \times 9.02\% / 12$)

Feb-Dec renew plan affordability amount =

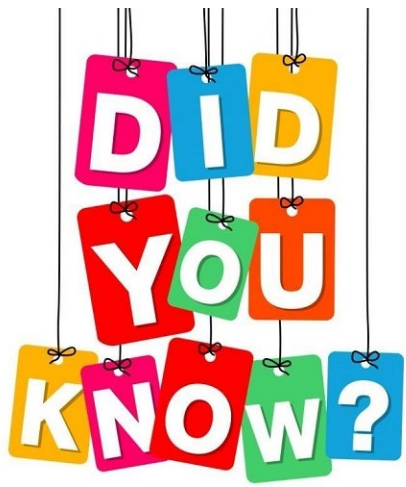
\$105.29 before the renew month ($15060 \times 8.39\% / 12$)

\$105.29 after the renew month ($15650 \times 9.02\% / 12$)

ACA - ICHRA

Didn't go so well for us this year...BUT we will try again for next year...

Please let your region know if you are changing to this for next year...



If you change your health plan renew month, you should be tracking change plans for dual measurement?

- ▶ Not if you are changing a carrier, but have the same renew month.

Create ACA Info - Multiple Employees

Selection of IDs Setup ACA Employee Information Setup ACA Employee Pay Codes **New Rows To Be Created**

1) Enter - As Of Date
 2) Optional - Choose additional criteria to select IDs for which new ACA rows are to be created.
 3) Click the 'Generate IDs for Tab 2' or the 'Create Missing ACA Information' button.

Generate IDs for ACA Setup OR ACA Emp Info OR Pay Codes
 Create Options (Required)
 ACA Emp Info Pay Codes

Note: Retrieval arguments on this page, do not apply when using these two boxes.

ACA Emp Info OR Pay Codes
 Copy From Date: Copy To Date:
 Copy ACA Emp Data
 Create Missing ACA Information

Create Plan Year Change

Location: ACA Frequency: Emp IDs: Show only active employees Employee Filter

- ▶ Talk to your region, they would love to help you with this if needed...

Secure 2.0 Act Aviben

Student loan 403b match contributions if employee certifies they made the payment...

New deduct code: TSAMAT_SL

Will create file to Aviben - Student 403B file

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

Vendor Extracts-Pretax Deducts

Vendor Extracts - Pre-Tax Deducts

Select a Vendor

- Omni
- Aviben
- Further
- Health Equity
- WEX
- MSRS - HCSP
- MSRS - MNDPC

Payee

Calendars

Fed Entity	Pay Cycle	Check Date	Calendar
	SEMIMONTH	01/15/2025	S202513-0
	SEMIMONTH	12/31/2024	S202512-0
	SEMIMONTH	12/13/2024	S202511-0
	SEMIMONTH	11/29/2024	S202510-0
	SEMIMONTH	11/15/2024	S202509-0
	SEMIMONTH	10/31/2024	S202508-0

Fix Missing Payees

Save as File

Preview of Datafile (Health Equity HSA) **Veba** HRAR HSA Student 403B

Employee ID SSN Employer Cont Employee Cont First Name Last Name

Coming Soon

SMART Client Files

Disclaimer: When downloading a file, be aware the file may contain sensitive data. It is up to the user downloading the file to manage the security of this file.

Download File Delete File Add File Show Deleted Files Un-Delete File


Folders

- ACA
 - Maintain_hrs
 - ACA_Aviben
 - ACH

File Name	Description	Created On	Created By	Confidential	Sent
WEX_HSA0 S2025130.csv	WEX HSA File	03/24/2025 12:29 PM	206 - Aadams	<input type="checkbox"/>	<input type="checkbox"/>
WEX_HSA0 S2025130WEXHSA.csv	WEX HSA File	01/10/2025 09:36 AM	629 - Carlson	<input type="checkbox"/>	<input type="checkbox"/>

TRA/PERA Demographics

- ▶ Both windows work similarly

 MN PERA Report

Demographic Only (No Payroll Data)


Demographic Information

Use Retire Demographics Flag

Use Demographic Change Dates

Pay Calendars

Fed Entity	Pay Cycle	Pay Pd Begin Date	Pay Pd End Date	Check Date	Calendar	---Processed---	---Files---	-Printed-	No
						Calc Create GL	DD GL TF	CK DD	ACH

 MN PERA Report

Demographic Only (No Payroll Data)

Demographic Information

Use Retire Demographics Flag

Use Demographic Change Dates

Begin

End

Pay Calendars

Fed Entity	Pay Cycle	Pay Pd Begin Date	Pay Pd End Date	Check Date	Calendar	---Processed---	---Files---	-Printed-	No
						Calc Create GL	DD GL TF	CK DD	ACH

MN Paid Leave Program

Yes, we are aware this is coming...after information is finalized - we will let you know...

We will have options for you once you know what you want to do...**but it will be up to you to know the regulations.**

MN UI Reports

District # 0

ISD # MN Quarterly UI Detail

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3/24/2025
12:43 PM

Qtr End	Year	UI Qtr	UI Account	UI Loc	ID	Name	Pay Code	Amount	Actual Units	Conversion	Default Hours	Override Hours	Pay Code Hours	Reported For UI
03/31/2025	2025	1	0	3	0300	1245 RICHARD, KARLA 1245	BUS1_UNIT	4,206.91	171.50		0		172	UI
03/31/2025	2025	1	0	3	0300	1245 RICHARD, KARLA 1245	HOURLY	1,505.31	83.18		0		83	UI
03/31/2025	2025	1	0	3	0300	1245 RICHARD, KARLA 1245	XNORET_HR	559.04	22.79		0		23	UI
03/31/2025	2025	1	0	3	0300	1344 ROBINSON, SHELDON 1344	XGMHLP_HR	180.00	6.00		0		6	UI
03/31/2025	2025	1	0	3	0300	1344 ROBINSON, SHELDON 1344	XGMHLP1_HR	120.00	4.00		0		4	UI
03/31/2025	2025	1	0	3	0300	1338 ROSA, EVA 1338	PARA_HR	4,340.63	231.50		0		232	UI
03/31/2025	2025	1	0	3	0300	1338 ROSA, EVA 1338	SUBTCH	150.00	1.00	7.00	0		7	UI
03/31/2025	2025	1	0	3	0300	1338 ROSA, EVA 1338	SUBTCH_HR	130.00	6.50		0		7	UI
03/31/2025	2025	1	0	3	0300	1199 ROY, ELLA 1199	COMMED_HR	1,094.60	52.00		0		52	UI
03/31/2025	2025	1	0	3	0300	1199 ROY, ELLA 1199	PARA_HR	5,263.36	381.00		0		381	UI
03/31/2025	2025	1	0	3	0300	836 SANTOS, KATIE 836	TEACHER	8,717.36	0.00		465.000		465	UI
03/31/2025	2025	1	0	3	0300	1247 SIMON, ERIN 1247	BUS_OT	225.58	6.13		0		6	UI
03/31/2025	2025	1	0	3	0300	1247 SIMON, ERIN 1247	BUS1_UNIT	8,830.80	360.00		0		360	UI
03/31/2025	2025	1	0	3	0300	1247 SIMON, ERIN 1247	SHFTDIF_HR	99.90	222.00		0		222	UI
03/31/2025	2025	1	0	3	0300	1312 SIMS, GLORIA 1312	PARA_HR	5,063.52	264.00		0		264	UI
03/31/2025	2025	1	0	3	0300	1208 SINGLETON, LUZ 1208	CUSTODIAN	4,750.20	0.00		520.000		520	UI
03/31/2025	2025	1	0	3	0300	1271 SOSA, TIM 1271	TEACHER	8,955.68	0.00		465.000		465	UI
03/31/2025	2025	1	0	3	0300	1271 SOSA, TIM 1271	XGMHLP_HR	90.00	3.00		0		3	UI
03/31/2025	2025	1	0	3	0300	1348 TALLEY, FLORENCE 1348	CUBUSUB_HR	1,042.50	69.50		0		70	UI
03/31/2025	2025	1	0	3	0300	607 TERRY, JULIUS 607	LONGEVITY	125.00	0.00		1.000		1	UI
03/31/2025	2025	1	0	3	0300	607 TERRY, JULIUS 607	TEACHER	13,462.16	0.00		465.000		465	UI
03/31/2025	2025	1	0	3	0300	607 TERRY, JULIUS 607	XTEACH_HR	30.00	1.00		0		1	UI
03/31/2025	2025	1	0	3	0300	231 TYLER, KARI 231	BLDGRND_HR	8,309.89	360.00		0		360	UI
03/31/2025	2025	1	0	3	0300	231 TYLER, KARI 231	MISC5_HR	725.76	18.00		0		18	UI
03/31/2025	2025	1	0	3	0300	876 VELEZ, NATHAN 876	PARA_HR	5,387.45	265.00		0		265	UI
03/31/2025	2025	1	0	3	0300	500 WEEKS, MARLON 500	XGMHLP_HR	140.00	2.00		0		2	UI
03/31/2025	2025	1	0	3	0300	1315 WILKINSON, DEBORAH 1315	BUS_SUB_UN	6,887.98	291.00		0		291	UI
03/31/2025	2025	1			9999	1303 BURTON, FRANK 1303	CUSTOD_HR	2,160.00	144.00		0		144	

New 941 form

- ▶ Included with the recent patch - IRS release date March 2025
- ▶ No new 941B at this time...some information shows a new one coming for March 2025...but not yet...

TRA Rate change

- ▶ Already in the software for 7/1/25
- ▶ Keep in mind for payoffs...

TimeOff: Transfer Balance Reason

Setup TimeOff Reasons

Select
TimeOff Plan SICK_TCHR

Seq	Reason	Description	Limit	Entry Type	AutoCalc	Units	Active	TimeTracker Limit
0	BRVMT	Bereavement Leave	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	E	Emergency Leave	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	FI	Family Illness	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	FMLA	Family Medical Leave	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	I	Illness	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	M	Medical Appt	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	MAT	Maternity Leave	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	SRGY	Surgery	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	WC	Worker's Comp	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0	ZERO	Zero out SL Balance	<input type="checkbox"/> 0.0000	2 - Usage	Yes		<input checked="" type="checkbox"/>	<input type="checkbox"/>
96	TRANSBAL	Transfer Balance	<input type="checkbox"/> 0.0000	3 - Accrual	Manual		<input checked="" type="checkbox"/>	<input type="checkbox"/>
07	ACCRUAL	Manual accrual	<input type="checkbox"/> 0.0000	3 - Accrual	Manual		<input checked="" type="checkbox"/>	<input type="checkbox"/>

- ▶ Why use? Transfer balances will not count against accrual limits
- ▶ Can be used in: TimeOff Activity-One Employee and TimeOff Activity-Multiple Emps windows

Reimbursements submitted >60 days

Only set to EBETAXABLE pay code if the receipt date the employee enters is >60 days...

NOT as it moves through the approval process.

If you think it should be, then payroll can delete it and when the employee resubmits it, it will be taxable.

*Deleting it in Timecard Master now denies it in SMART eR to keep the audit trail intact.

Proofing Reimbursements

Timecard Archive Detail

Timecard Archive Detail ? Select Value(s): << Sort Filter Clear

Create Report

Retrieval Argument(s)

ID

Primary Status

Secondary Status

Pay/Deduct Code

Timecard Type

Created By

Cal/Cal Seq

Union Code

Location

Start Date

Stop Date

Debit Account

Batch

Reimb

The Reimb(s) you enter in this field are compared to the Reimb(s) on the timecard. You have the option to select all, multiple, or a range of numbers for more information.

Timecard Archive Detail

8:06 PM

	Calendar	Type/ Option	Pay/Ded Code	ACA Unit Units	Conversion Unit	Rate	Amount	Account Code	Earn Sch	ACA Month	Pay Type	Check Description	Batch No	Created By	Reimb No
Id: 1172		SUTTON, FRANK													
	04/30/2021	S202120-0	P EBENONW2	0.00		49.28	\$49.28	31-005-030-000-000-366	0	04/30/2021		273-3/4-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		49.28	\$49.28	31-005-030-000-000-366	0	04/30/2021		273-3/11-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		44.80	\$44.80	31-005-030-000-000-366	0	04/30/2021		273-3/29-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		38.08	\$38.08	31-005-030-000-000-366	0	04/30/2021		273-3/22-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		49.28	\$49.28	31-005-030-000-000-366	0	04/30/2021		273-3/18-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		73.92	\$73.92	31-005-030-000-000-366	0	04/30/2021		273-3/25-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/19-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/9-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/26-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/10-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/12-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/8-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/23-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/3-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/15-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/1-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/2-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/31-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/24-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/5-MILEAGEWA		3112	273
	04/30/2021	S202120-0	P EBENONW2	0.00		20.16	\$20.16	31-020-211-000-008-366	0	04/30/2021		273-3/30-MILEAGEWA		3112	273
	Units Subtotal:			0.00		EBENONW2 Total:		\$607.04							
	Units:			0.00		Emp Pay:		\$607.04							
Employee Count	1	Totals:		0.00		\$607.04									

Payroll | Tax Setup

Tax Setup
As Of: 03/24/2025

ID	Name	Start	Stop	Mar	Allow	ST	Step	Step	Step	Step	4c - Addnl	Exempt			
							2	3	4a	4b		Medi	OASDI	FUTA	
1399	BEACH, SANTIAGO 1399														
	FIT	01/22/2019		M	0	WI					0.00	N	N	Y	
	SITWI	01/22/2019		M	0						0.00				
2129	BLAKE, SYLVIA 2129														
	FIT	10/01/2021		M		WI	N	0.00	0.00	0.00	0.00	N	N	Y	
	SITWI	10/01/2021		M	0						0.00				
1517	BLEVINS, VAN 1517														
	FIT	09/01/2019		S	1	IA					0.00	N	N	Y	
	SITIA	09/01/2019		M	1						0.00				
1457	BOWEN, DOUGLAS 1457														
	FIT	01/22/2019		M	0	WI					0.00	N	N	Y	
	SITWI	01/22/2019		M	0						0.00				
1994	BOYER, VICTORIA 1994														
	FIT	01/23/2019		M	0	WI					0.00	N	N	Y	
	SITWI	01/23/2019		M	0						0.00				
2172	CARNEY, GRANT 2172														
	FIT	03/01/2023		S		KS	N	0.00	0.00	0.00	0.00	N	N	Y	
	SITKS	03/01/2023		S	0						0.00				
1514	COFFEY, ROSIE 1514														
	FIT	01/01/2024		M		GA	N	0.00	0.00	0.00	0.00	N	N	Y	
	SITGA	01/01/2024		M		Depend Credit: 0					20.00				
2171	CONWAY, TONYA 2171														
	FIT	09/01/2022		M		NY	N	0.00	0.00	0.00	0.00	N	N	Y	
	SITNY	09/01/2022		M	0						0.00				
1675	COOKE, LATOYA 1675														
	FIT	01/01/2024		S		CO	N	0.00	0.00	0.00	0.00	N	N	Y	
	SITCO	01/01/2024		S	600						0.00				
506	CORTEZ, TABITHA 506														
	FIT	12/01/2019		M	2	ND					250.00	N	N	Y	
	SITND	12/01/2019		M							0.00				

Withholding States supported by SMART

Arizona (AZ)

Colorado (CO)

Connecticut (CT)

Georgia (GA)

Hawaii (HI)

Illinois (IL)

Iowa (IA)

Kansas (KS)

Michigan (MI)

Minnesota (MN)

New York (NY)

Nebraska (NE)

North Carolina (NC)

North Dakota (ND)

Oklahoma (OK)

Pennsylvania (PA)

South Carolina (SC)

Wisconsin (WI)

No tax states:

Alaska (AK)

Florida (FL)

Nevada (NV)

New Hampshire (NH)

South Dakota (SD)

Tennessee (TN)

Texas (TX)

Washington (WA)

Wyoming (WY)

Today's Agenda

- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

Random Reminders

Calculate Payroll

Calculate Payroll

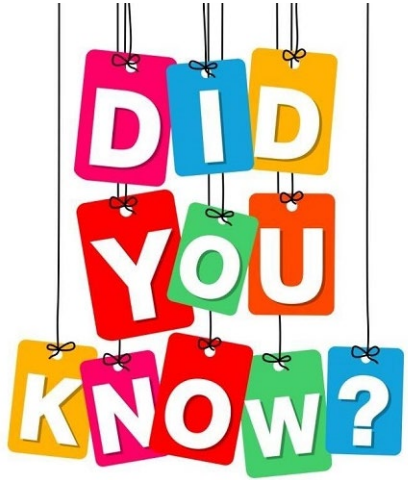
Pay Calendars	Fed Entity	Pay Cycle	Pay Period Begin Date	Pay Period End Date	Check Date	Calendar	---Processed---		---Files---		-Printed-		No	W- 4
							Calc	Create	GL	DD	GL	TF		
41		SEMIMONTH	1/16/2025	1/31/2025	1/30/2025	S202514	Y	N	N	N	N	N	N	N
41		SEMIMONTH	2/1/2025	2/15/2025	2/14/2025	S202515	N	N	N	N	N	N	N	N
41		SEMIMONTH	2/16/2025	2/28/2025	2/28/2025	S202516	N	N	N	N	N	N	N	N
41		SEMIMONTH	3/1/2025	3/15/2025	3/14/2025	S202517	N	N	N	N	N	N	N	N
41		SEMIMONTH	3/16/2025	3/31/2025	3/28/2025	S202518	N	N	N	N	N	N	N	N
41		SEMIMONTH	4/1/2025	4/15/2025	4/15/2025	S202519	N	N	N	N	N	N	N	N
41		SEMIMONTH	4/16/2025	4/30/2025	4/30/2025	S202520	N	N	N	N	N	N	N	N
41		SEMIMONTH	5/1/2025	5/15/2025	5/15/2025	S202521	N	N	N	N	N	N	N	N
41		SEMIMONTH	5/16/2025	5/31/2025	5/30/2025	S202522	N	N	N	N	N	N	N	N
41		SEMIMONTH	6/1/2025	6/15/2025	6/13/2025	S202523	N	N	N	N	N	N	N	N
41		SEMIMONTH	6/16/2025	6/30/2025	6/30/2025	S202524	N	N	N	N	N	N	N	N

Pay and Deductions/Benefits Scheduled for Calculation

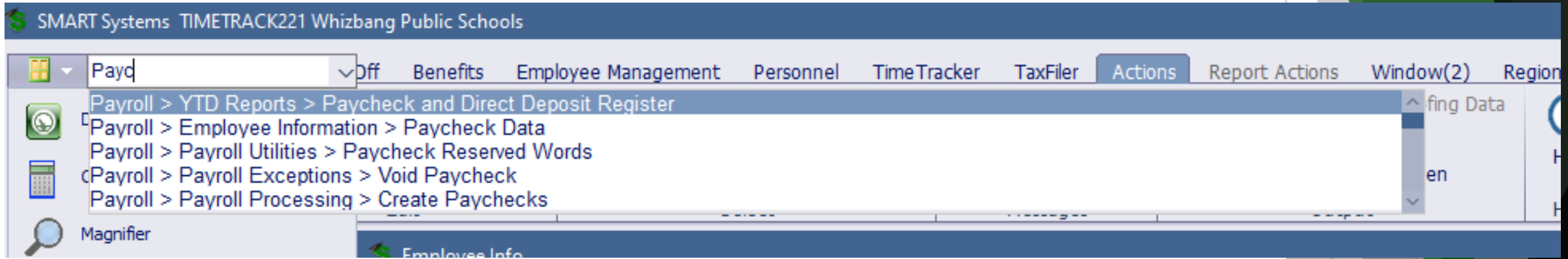
Total Codes: 94

Pay Codes	Frequency	Pay Codes	Frequency	Pay Codes	Frequency	Pay Codes	Frequency
ADVISOR	FOUR	BUSMGR	ALL	CONFIDEN	ALL	COORD	ALL
LIFETAX	ALL	LONGEVITY	SCHOOLYR	MENTOR	ALL	NURSE	ALL
PRINCIPAL	ALL	SUPT	ALL	TEACHER	SCHOOLYR	TEACHER2	SCHOOLYR
XBASEBALL	ALL	XGOLF	ALL	XSOFTBALL	ALL		

Deduct/benefit	Frequency	Deduct/benefit	Frequency	Deduct/benefit	Frequency	Deduct/benefit	Frequency
BCGRCHECK	ALL	CCIC	ALL	CCICFLX	ALL	CHILDSUPP1	ALL
CHILDSUPP2	ALL	DCP_EE	RETIRE	DCP_ER	RETIRE	DCP_FIXR	ALL
DCPWAGE	RETIRE	DEFCMP_FEE	DEFCOMP	DEFCOMP	ALL	DEFCOMP%	ALL
DEFMATCH	ALL	DENTALFLX	ALL	DENTALR	ALL	DUES%G	ALL
DUES1	DUES1&2	DUES3	DUES3	FITWGADJ	ALL	FLEXTOTL	RETIRE
FSADP25	FLEX_YR25	FSAMED25	FLEX_YR25	GARN_LEVY	ALL	GARNISH1	ALL
GARNISH2	ALL	GTLIFE	ALL	GTLIFEFLX	ALL	HCSP_NOTX%	ALL
HEALTH	ALL	HEALTH2	ALL	HEALTH2FLX	ALL	HEALTH2R	ALL



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



HR | Background Check

Background Check

Create Report

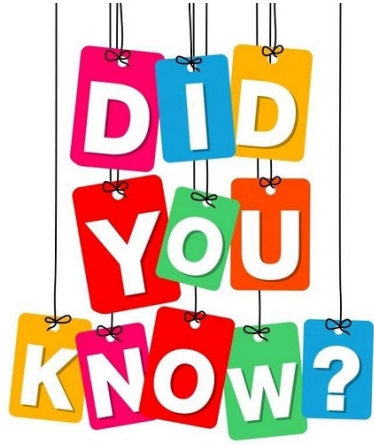
Retrieval Argument(s)	Value(s)	Wildcards
Ending Date Filed	* 3/24/2025	
Beginning Date Filed		
ID		<input type="checkbox"/>
Primary Status	AC,LV	<input type="checkbox"/>
Secondary Status		<input type="checkbox"/>
Location		<input type="checkbox"/>
Missing Background Check	N	

Background Check

D	Name	Date Filed	Verified	Employee Signature	Date Signed	Fee Collected	Description
292	ACEVEDO, DONALD	1292					
350	AVILA, ADRIAN	1350					
240	BAILEY, TERRENCE	1240					
248	BALLARD, HOLLY	1248					
286	BARTLETT, VERA	1286					
346	BENDER, CAROLINE	1346					
347	BENDER, TIMMY	1347					

Ending Date Filed - defaults to today, but can be changed

Missing Background Check -Y -> will create list of active employees that do not have a background check on file.



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

Workflow Message

From: Aadams, Aaron A Sent: 02/27/2023 4:17 PM [Open Attached Window](#)
[Open Attached File](#)

Summary: ID 1445 - term date

Reply By: Action Review/Comment

I thought this person was supposed to be terminated, but I see he is still active?

Forward Reply Delete Save to Emp Notes

Finance Payroll TimeOff Benefits Employee Management Personnel TimeTracker Taxfiler Actions Report Actions Window(2) Region Help

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

Quick Access My Favorites [A-Z]

TimeTracker most used Employee TimeTracker Settings Emp Info most used New Hire Employee Info Paycheck Data Rehire Employee Terminate Employee

SMART Dashboard

Finance Defaults

Company	E	Currency Code	USD
Date	02/27/2023	Location	
Period - GL	202308	Vendor Group	1
Period - AP	202308	Customer Group	1
Period - AR	202308	FA Fiscal Yr	2022
AR Image	DFLT	PO Image	DFLT

Messaging - Inbox

From	Summary
Aadams, Aaron A	ID 1445 - term date
System	A change to Medical
System	A change to employ
System	A change to employ
System	A change to Medical in

Sent	Reply By	Priority
02/27 4:17 PM		
04/28/2022		Low
04/28/2022		Low
04/28/2022		Low
04/28/2022		Low

Setup Pay Calendars

New warning if a calendar is being deleted and timecards are attached to it:

The screenshot shows the 'Setup Pay Calendars' application window. At the top, there is a 'Select' section with dropdown menus for 'Starting Fiscal Year' (2025), 'Include 'Z' Calendars' (Yes), and 'Include 'X' Calendars' (No). A list box shows 'SEMIMONTH Semimonthly Payroll'. Below this are three buttons: 'Insert Next Calendar', 'Create Z Calendar', and 'Create X Calendar'.

The main area contains a table with the following columns: Payroll, Calendar, Seq, Pay Period Begin, Pay Period End, Check Date, Check Day, Acct Date, Fis Year, Fis Pd, No ACH, Payoff Codes, Pay Calc, Pay Create, Chk Prt, DD File, DD Prt, GL Create, GL File, PERA Lock, TRA Lock, W-4 Chg, and Supp Tax. The table lists 18 semimonthly payroll calendars for 2025, with the last row (S202517) highlighted in blue.

A dialog box titled 'Timecards Exist' is overlaid on the table. It contains an information icon and the text: 'Timecards exist for this Calendar/Cal Seq that must be deleted first.' An 'OK' button is at the bottom right of the dialog.

Payroll	Calendar	Seq	Pay Period Begin	Pay Period End	Check Date	Check Day	Acct Date	Fis Year	Fis Pd	No ACH	Payoff Codes	Pay Calc	Pay Create	Chk Prt	DD File	DD Prt	GL Create	GL File	PERA Lock	TRA Lock	W-4 Chg	Supp Tax
SEMIMONTH	S202501	0	07/01/2024	07/15/2024	07/15/2024	Mon	07/15/2024	2025	1	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202502	0	07/16/2024	07/31/2024	07/31/2024	Wed	07/31/2024	2025	1	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202503	0	08/01/2024	08/15/2024	08/15/2024	Thu	08/15/2024	2025	2	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202504	0	08/16/2024	08/31/2024	08/30/2024	Fri	08/31/2024	2025	2	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202505	0	09/01/2024	09/15/2024	09/13/2024	Fri	09/15/2024	2025	3	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202506	0	09/16/2024	09/30/2024	09/30/2024	Mon	09/30/2024	2025	3	<input type="checkbox"/>		N	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202507	0	10/01/2024	10/15/2024	10/15/2024	Tue	10/15/2024	2025	4	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202508	0	10/16/2024	10/31/2024	10/31/2024	Thu	10/31/2024	2025	4	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202509	0	11/01/2024	11/15/2024	11/15/2024	Fri	11/15/2024	2025	5	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202510	0	11/16/2024	11/30/2024	11/29/2024	Fri	11/30/2024	2025	5	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202511	0	12/01/2024	12/15/2024	12/13/2024	Fri	12/15/2024	2025	6	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202512	0	12/16/2024	12/31/2024	12/31/2024	Tue	12/31/2024	2025	6	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202513	0	01/01/2025	01/15/2025	01/15/2025	Wed	01/15/2025	2025	7	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202514	0	01/16/2025	01/31/2025	01/31/2025	Fri	01/31/2025	2025	7	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202515	0	02/01/2025	02/15/2025	02/14/2025	Fri	02/15/2025	2025	8	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202516	0	02/16/2025	02/28/2025	02/28/2025	Fri	02/28/2025	2025	8	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202517	0	03/01/2025	03/15/2025	03/14/2025	Fri	03/15/2025	2025	9	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>
SEMIMONTH	S202518	0	03/16/2025	03/31/2025	03/31/2025	Mon	03/31/2025	2025	9	<input type="checkbox"/>		Y	Y	N	Y	Y	Y	Y	Y	Y	N	<input type="checkbox"/>

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	<input type="text" value="00/00/0000"/> ▼	06/05/2019	<input type="checkbox"/>
535449	AGUIRRE, MITCHELL 535449	08/28/1985	<input type="text" value="00/00/0000"/> ▼	05/29/2020	<input type="checkbox"/>
112315	ATKINS, LORI 112315	01/30/2012	<input type="text" value="00/00/0000"/> ▼	05/27/2020	<input type="checkbox"/>
193344	AYALA, LAUREN 193344	03/02/1998	<input type="text" value="00/00/0000"/> ▼	05/29/2020	<input type="checkbox"/>
222737	BAIRD, CLAYTON 222737	09/08/2015	<input type="text" value="00/00/0000"/> ▼	08/26/2020	<input type="checkbox"/>
838964	BARKER, LUZ 838964	08/28/2000	<input type="text" value="00/00/0000"/> ▼	01/03/2020	<input type="checkbox"/>
439168	BARRERA, ROBIN 439168	09/03/1991	<input type="text" value="00/00/0000"/> ▼	01/08/2020	<input type="checkbox"/>
1087	BEACH, AUBREY 1087	08/01/2021	<input type="text" value="00/00/0000"/> ▼	01/30/2023	<input type="checkbox"/>
1147	BENDER, ESTHER 1147	10/18/2021	<input type="text" value="00/00/0000"/> ▼	01/30/2023	<input type="checkbox"/>

General Ledger-Pay | Payroll/Finance Comparison

This report will compare Payroll to what Finance has

Payroll - General Ledger

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

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 <>	* N

Payroll / Finance Comparison

2/27/23
4:26 PM

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

Enhanced Search Boxes

Employee Info

Select Employee ID Retire Demographic Flag

Status Changes Supp Info Basic Info Name/Address 3rd Party Info ACA Info Background Contract Info Photo Custom Info

Employee Search

Employee Search

Last Name	First Name, MI	ID	Location	Department	Status
ABBOTT	CLAUDIA, 1127	1127	899	ALL	TR
ABBOTT	FAYE, 705	705	899	ALL	TR
ABBOTT	FRANK, 2399	2399	T2170_ST-M	ALL	AC
ABBOTT	JACKIE, 1588	1588	899	ALL	TR
ABBOTT	JONATHAN, 3189	3189	801	ALL	TR
ACEVEDO	BRETT, 2858	2858	802	ALL	TR
ACEVEDO	JON, 3749	3749	800	ALL	AC
ACEVEDO	LUCIA, 452	452	899	ALL	TR

Coming Soon

Autosizing on windows

Employee Info

Select

Employee ID DONALD 1292 ACEVEDO AC 04 Retire Demographic Flag

Orig Hire Date 12/19/2022 Adj Hire Date 12/19/2022

Status Changes Supp Info Basic Info Name/Address 3rd Party Info ACA Info Background Contract Info Photo Custom Info Bene

Rows 1 - 1 of 1

Changed	<input type="text" value="12/19/2022"/>	Job	<input type="text"/>	Leave Type	<input type="text"/>		
Prim Status	AC	Location	<input type="text" value="300"/>	Location-300	Leave Reason	<input type="text"/>	
Sec Status	<input type="text" value="01"/>	Active 12 month Full Time	Department	<input type="text" value="001"/>	District Wide	Actual Start Date	<input type="text" value="00/00/0000"/>
Retire Status	<input type="text" value="N"/>	New Employee	Check Loc	<input type="text" value="300"/>	Secondary Services	Expected Return	<input type="text" value="00/00/0000"/>
Orig Hire Date	12/19/2022		Unemp Loc	<input type="text" value="0300"/>	Secondary Services	Actual Return	<input type="text" value="00/00/0000"/>
Adj Hire Date	<input type="text" value="12/19/2022"/>		EEO Loc	<input type="text" value="300"/>		Last Worked	<input type="text" value="00/00/0000"/>
W-2 Output	<input type="text" value="Automatic"/>		EEO Code	<input type="text" value="SERVICE"/>	Service Worker	Terminate Reason	<input type="text"/>
Exempt	<input type="checkbox"/>					Elicible Rehire	<input type="text"/>

Payroll | Retirement Setup

Retirement Setup

3/24/2025
4:40 PM

As Of: 03/24/2025

Employee Name	ID	SSN	Birth Date	Retire Number	PERA EXCLUSION		PERA			TRA		SEDRA	
Plan	Coverage	Start Date	Stop Date	Position Code	Terminated	Exclude Code	Job Title	Eligibility Date	Position Class	Pro	PP Hours	Elig Code	TRA Days
ABBOTT, MELINDA	981			07/31/1988									
NONE	OASDI&MEDI	09/26/2011		03	N	302	COMMEDPARA			N			
ABBOTT, TRACY	1274			02/13/2002									
PERA	COORD	08/31/2022		03	N	000	PARAPROFESSIONAL	08/31/2022	Part-time	N			
ACEVEDO, DONALD	1292			08/24/1966									
PERA	COORD	12/19/2022		03	N	000	CUSTODIAN	12/19/2022	Full-time	N			
ADKINS, MARCIA	267			02/05/1953									
TRA	COORD	11/01/1999		01	N	000				N		Teacher (full or part time)	
AGUILAR, DUANE	421			08/14/1972									
TRA	COORD	11/01/1999		01	N	000				N		Substitute teacher	
ALEXANDER, JESSICA	3001												
NONE	NO_FICA	11/01/1999		00	N	000				N			
ALFORD, FLORA	490			10/26/1949									
TRA	COORD	11/01/1999		01	N	000				N		Substitute teacher	
ALFORD, NOEL	463			07/29/1960									
PERA	COORD	11/01/1999		03	N	000		08/11/2003	Seasonal	N			
ALLEN, GINGER	613			05/07/1944									
TRA	ANNUITANT	09/01/2002		01	N	002	SUBTEACHER			N		Substitute teacher	
ALVARADO, JILL	768			12/03/1979									
TRA	COORD	10/28/2005		01	N	000				N		Substitute teacher	
ALVARADO, MARCELLA	1041			01/31/1954									
TRA	COORD	09/20/2013		01	N	000				N		Substitute teacher	
ALVARADO, PENNY	858			12/07/1972									
PERA	COORD	10/29/2007		03	N	000				N		Nurse	
ALVARADO, SHELLY	1123			04/26/1993									
TRA	COORD	01/09/2017		01	N	000	SUBTEACHER			N		Substitute teacher	
ALVAREZ, BROOKE	1183			09/05/1963									
NONE	OASDI&MEDI	08/26/2019		03	N	106	COACH			N			

Retirement Setup

Retirement Setup

Create Report

Retrieval Argument(s)	Value(s)	Wildcards
As Of Date	* 3/24/2025	
ID	<input type="text"/>	<input type="checkbox"/>
Primary Status	AC <input type="text"/>	<input type="checkbox"/>
Secondary Status	<input type="text"/>	<input type="checkbox"/>
Retirement Plan	<input type="text"/>	
Coverage Type	<input type="text"/>	
Position Code	<input type="text"/>	<input type="checkbox"/>
Position Class	<input type="text"/>	<input type="checkbox"/>
PERA Exclude Code	<input type="text"/>	<input type="checkbox"/>
PERA Pro	<input type="text"/>	
Union Code	<input type="text"/>	

Payroll Setup | Setup New Hire/Rehire Templates

Setup New Hire/Rehire Templates

Select

Employee Template

Pay Codes Pay Auth Deductions

Pay Code	Start Date	Stop Date
TEACHER	09/01/2022	08/31/2023

Double click Rate Table Box for Rate Information

Rate Table:

Overrides: Hrs/Day Days/Y

8.000 .000 183.000

Notes:

New Hire

Select Employee ID [Transfer from Assignments](#)

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 eR Access

Federal Race and Ethnicity:

* Ethnicity:

* Race(s):

American Indian or Alaska Native

Asian

Native Hawaiian or Other Pacific Islander

Black or African American

White

Status Info Address Info ACA Info Supp Info 3rd Party Info Benefit Elig

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 HR Copy TimeTracker

ID to be copied

Enter Start Dates: OR Build defaults from Employee Templates

Pay Codes Pay Authorization Employee Template

Deductions Retirement Start Date

Distribution Timeoff

Folders can be built in Employee Notes

Folders are automatically setup for all employees

The screenshot shows the 'Employment Notes' application window. The title bar reads 'Employment Notes'. The main header area displays 'FAYE 705 ABBOTT' and 'Orig Hire Date 5/1/2002 Adj Hire Date 5/1/2002'. A 'Print Note' button is in the top right. On the left, a 'Folders' sidebar lists: General, Insurance Forms, Salary & Benefit Notice, Career Planning (expanded), Continuing Ed, **Disciplinary Action** (highlighted), Commendations, and Employment Info. The main area contains a table with columns: Date, Confidential, Description (Required), Attachment, Attachment Type, View in SeR, Sign, and Active. A single row is visible with Date '03/31/2025', Confidential checkbox, and Description 'disciplinary notice'. Below the table, it says 'Note Added By: MARTIN, JULIO 206' and 'View Date: Sign Date:'. At the bottom, there are buttons for 'Add Folder', 'Add Sub Folder', 'Delete Note', 'Insert Note', 'Rename Folder', and 'Delete Folder'. A note states: 'Notes marked as 'Confidential' are only visible to whoever entered them.' A dashed box labeled 'Drag Attachment Here' is present. Other buttons include 'Open Attachment', 'Add Attachment', 'Hide Inactive', 'Save', and 'Close'. A footer message reads: '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.'

Date	Confidential	Description (Required)	Attachment	Attachment Type	View in SeR	Sign	Active
03/31/2025	<input type="checkbox"/>	disciplinary notice					▼

SMART eR Changes

SMART eR Changes

Selection of IDs

SMART eR Changed Rows

Selection of IDs

SMART eR Changed Rows

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

Validate And Save

Show All Filter Adjust Values Sort

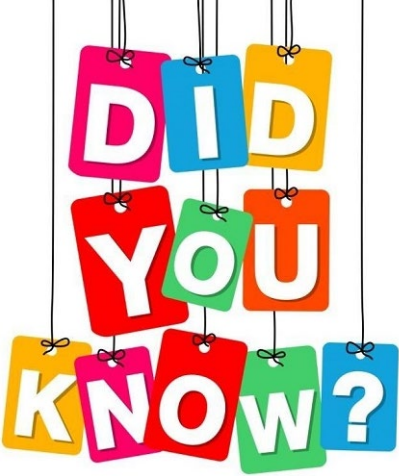
Name and Address Changes

ID	Name	Changed	First	Middle	Last
1370	Chaney, Ida 1370	01/28/2202	Ida	1370	Chaney
<input type="checkbox"/>	<input type="checkbox"/> Verified	Address PO Box 1370		Changed By 1370	
Verified Comments					
<input type="text"/>					
315	Hancock, Alexander 315	03/07/2023	Alexander	315	Hancock
<input type="checkbox"/>	<input type="checkbox"/> Verified	Address address		Changed By 315	
Verified Comments					
<input type="text"/>					

City Somewhere State MN Postal Code 12345- Country US

City somewhere State MN Postal Code 55555- Country US

ILV On Leave 1909 Alexander, Jonnie 1909



Employees can be forced to withhold through IRS lock-in letters?

Paycheck Data

Select Employee ID FAYE 705 ABBOTT TR LPTS
Orig Hire Date 5/1/2002 Adj Hire Date 5/1/2002

NOTES Retire Demographic Flag

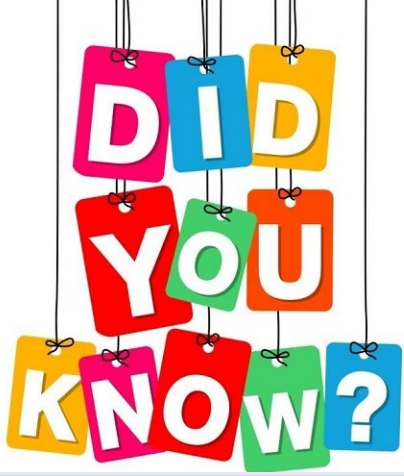
Pay Codes Pay Auth Deductions Distribution Taxes Retirement Ck Delivery Pay Detail ACA Info ACA Pay Codes

Fed ID: 410999552 Federal/State Tax

Start Date	Stop Date	Marital	Allow	Tax State	Step 2	Step 3	Step 4a	Step 4b	4c - Additional Withhold	Exemptions: Medicare	OASDI	FUTA
05/01/2002	00/00/0000	S	00	MN					\$0.00	No	No	Yes
State:	Tax Code: SITMN	S	00	Depend Credit: 00	Changed By:				\$0.00	Date Changed:		

IRS Lock-in Letter Tracking

Locked	Start Date	Stop Date	Marital	Allow	Lock Type	Step 2	Step 3	Step 4a	Step 4b	4c - Additional Withhold
<input checked="" type="checkbox"/>	00/00/0000	00/00/0000		00	<ul style="list-style-type: none">Lock In-FedAllow Lock In-FedLock In-StateModification		\$0.00	\$0.00	\$0.00	\$0.00



SMART Client Files has an attachment option?

SMART Client Files

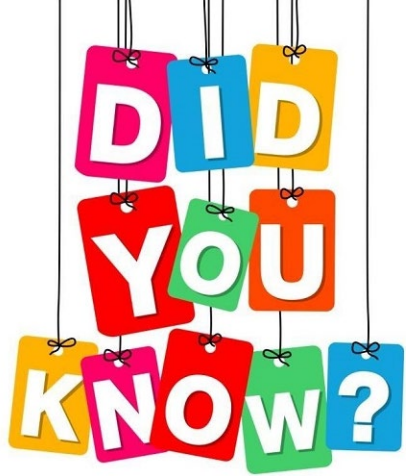
Disclaimer: When downloading a file, be aware the file may contain sensitive data. It is up to the user downloading the file to manage the security of this file.

Download File Delete File **Add File** Show Deleted Files Un-Delete File

Folders

- ▲ ACA
 - Maintain_hrs
 - ACH
 - AVIBEN
 - eeoc
 - FINGL
 - FROI
 - Invoices
 - IRS
 - MN_UI
 - NEW_HIRE
 - PERA
 - sf_1099
 - sf_default
 - SSA
 - STAR
 - TRA
 - Voucher

File Name	Description	Created On	Created By	Confidential	Sent
(Empty table body)					



In Payroll Utilities there is a window Create/Maintain Emp Info-Addl?

Create/Maintain Emp Info-Addl

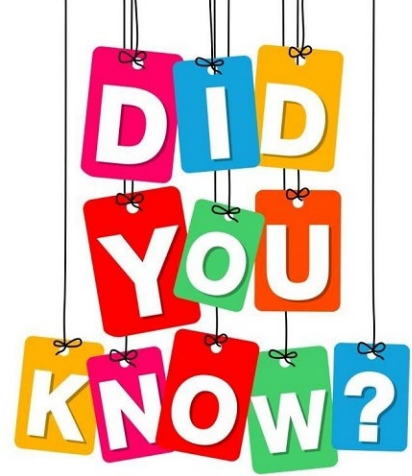
Selection of IDs New Rows To Be Created

ID License Issue License Renewal
 License Code License No Verified
 License Expiration License Group Verified Comments

Sort By: Name ID

Do Not Save All

Do Not Save	ID	Name	Other Licenses/Certifications					Group Changed By
			License Code	License No.	Issue	Expire	Renewal Date Changed	
<input type="checkbox"/>	534	BRAY, DOYLE 534	Physical Therapist	000	06/16/1980	12/31/2012	12/31/2013	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:56 AM	206	
<input type="checkbox"/>	1582	BRIGHT, JEFFERY 1582	Occupational Therapist	0000	01/14/1998	06/30/2014	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:56 AM	206	
<input type="checkbox"/>	1526	BRITT, ABEL 1526	Drivers License	T09	00/00/0000	00/00/0000	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:56 AM	206	
<input type="checkbox"/>	2159	CRUZ, ABEL 2159	Drivers License	Z7362	00/00/0000	00/00/0000	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/14/2013 01:19 PM	685	
<input type="checkbox"/>	438	GOLDEN, JAIME 438	Physical Therapist	000	09/15/1990	12/31/2012	12/31/2012	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:56 AM	206	
<input type="checkbox"/>	360	SANFORD, SAMANTHA 360	Occupational Therapist	0100	11/22/1996	02/28/2013	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:57 AM	206	
<input type="checkbox"/>	641	SCHNEIDER, BERNICE 641	Driver Education	X73	00/00/0000	00/00/0000	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:57 AM	206	
<input type="checkbox"/>	620	SOLOMON, DREW 620	Drivers License	W51	00/00/0000	00/00/0000	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:57 AM	206	
<input type="checkbox"/>	699	STOUT, ROLAND 699	Occupational Therapist	0000	08/12/1998	06/30/2014	00/00/0000	
		Verified <input checked="" type="checkbox"/> Verified Comments				03/31/2025 09:57 AM	206	



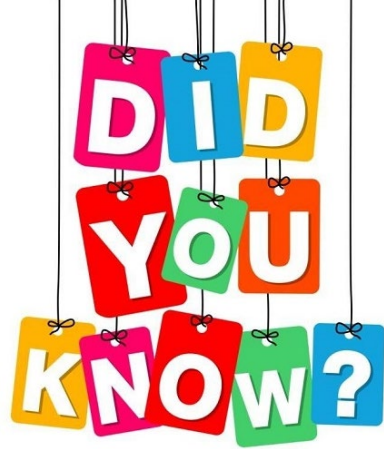
There is a window in Payroll Utilities - Mass Update Emp Work Email?

Mass Update Emp Work Email

Selection Create/Maintain

Do Not Save All Sort

Do Not Save	ID	Name	Date Changed	Work Email
<input type="checkbox"/>	2399	ABBOTT, FRANK 2399	08/12/2014	
<input type="checkbox"/>	3749	ACEVEDO, JON 3749	12/27/2023	
<input type="checkbox"/>	254	ADKINS, RYAN 254	05/01/2002	
<input type="checkbox"/>	2699	AGUILAR, JILL 2699	08/15/2016	
<input type="checkbox"/>	3784	AGUILAR, WILLIAM 3784	05/22/2024	
<input type="checkbox"/>	2635	ALBERT, ARTHUR 2635	01/27/2016	
<input type="checkbox"/>	142	ALBERT, GUADALUPE 142	05/20/2021	
<input type="checkbox"/>	3770	ALEXANDER, CATHERINE 3770	04/10/2024	
<input type="checkbox"/>	2139	ALFORD, ROBYN 2139	06/21/2012	
<input type="checkbox"/>	2161	ALLEN, EILEEN 2161	04/17/2022	
<input type="checkbox"/>	3798	ALLEN, JUDY 3798	05/20/2024	
<input type="checkbox"/>	3808	ALLEN, WOODROW 3808	06/16/2024	
<input type="checkbox"/>	3559	ALLISON, DONNIE 3559	08/04/2022	
<input type="checkbox"/>	3687	ALSTON, CATHERINE 3687	07/05/2023	
<input type="checkbox"/>	3480	ALSTON, SHANE 3480	04/22/2022	
<input type="checkbox"/>	3734	ALVARADO, MARION 3734	09/25/2023	
<input type="checkbox"/>	3774	ALVARADO, SONIA 3774	04/29/2024	



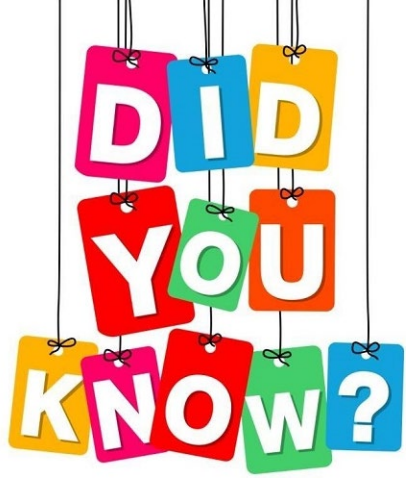
In HR there are two reports to track turnover?

Employee Turnover by Location

Employee Turnover by Union

	<u>Number of Employees</u>		Average	Change	Turnover
	Beginning	Ending			
Location-000					
Union: Administration	0	0	.0	0	0.00%
Board Member	14	14	14.0	0	0.00%
Community Expert	0	0	.0	0	0.00%
Custodial	0	0	.0	0	0.00%
MSEA - Opt Out of Dues	0	0	.0	0	0.00%
NONE - Ineligible	1	1	1.0	0	0.00%
Office Fiscal Year	0	0	.0	0	0.00%
Office School Year	0	0	.0	0	0.00%
Substitute Staff	0	0	.0	0	0.00%
Support Staff	0	0	.0	0	0.00%
Tchr - Opt Out of Dues	0	0	.0	0	0.00%
Teachers	3	3	3.0	0	0.00%
Youth Build Non-Union Elig	0	0	.0	0	0.00%
Sub Total:	18	18	18.0	0	0.00%
Location-0000					
Union: Administration	0	0	.0	0	0.00%
Board Member	0	0	.0	0	0.00%
Community Expert	0	0	.0	0	0.00%
Custodial	0	0	.0	0	0.00%
MSEA - Opt Out of Dues	0	0	.0	0	0.00%
NONE - Ineligible	0	0	.0	0	0.00%
Office Fiscal Year	0	0	.0	0	0.00%
Office School Year	0	0	.0	0	0.00%
Substitute Staff	1	1	1.0	0	0.00%
Support Staff	0	0	.0	0	0.00%
Tchr - Opt Out of Dues	0	0	.0	0	0.00%
Teachers	0	0	.0	0	0.00%
Youth Build Non-Union Elig	0	0	.0	0	0.00%
Sub Total:	1	1	1.0	0	0.00%
Location-0001					
Union: Administration	0	0	.0	0	0.00%
Board Member	0	0	.0	0	0.00%

Union	<u>Number of Employees</u>		Average	Change	Turnover
	Beginning	Ending			
Administration					
Sub Total:	18	18	18.0	0	0.00%
Board Member					
Sub Total:	14	14	14.0	0	0.00%
Community Expert					
Sub Total:	14	14	14.0	0	0.00%
Custodial					
Sub Total:	5	4	4.5	1	22.22%
MSEA - Opt Out of Dues					
Sub Total:	16	15	15.5	1	6.45%
NONE - Ineligible					
Sub Total:	4	4	4.0	0	0.00%
Office Fiscal Year					
Sub Total:	17	17	17.0	0	0.00%
Office School Year					
Sub Total:	2	2	2.0	0	0.00%
Substitute Staff					
Sub Total:	13	13	13.0	0	0.00%
Support Staff					
Sub Total:	80	74	77.0	6	7.79%
Tchr - Opt Out of Dues					
Sub Total:	14	12	13.0	2	15.38%
Teachers					
Sub Total:	96	99	97.5	-3	-3.08%
Youth Build Non-Union Elig					
Sub Total:	9	9	9.0	0	0.00%
Grand Total:	302	295	298.5	7	2.35%



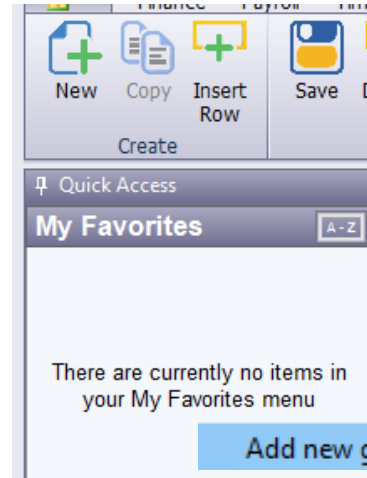
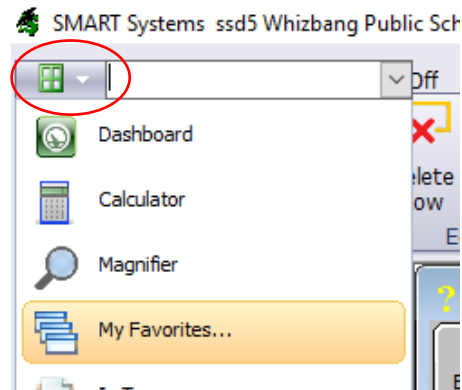
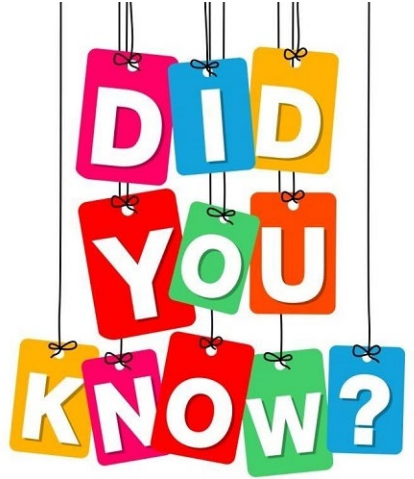
The HR | Status-Date Range report has Original Hire date retrieval arguments?

To help you isolate your New hires...

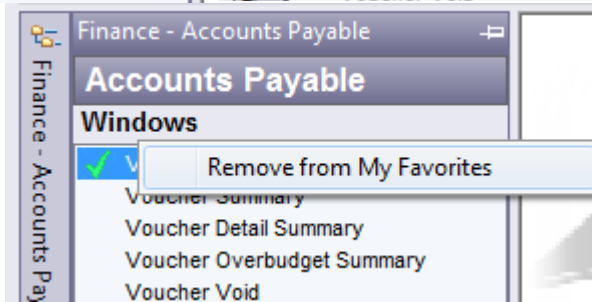
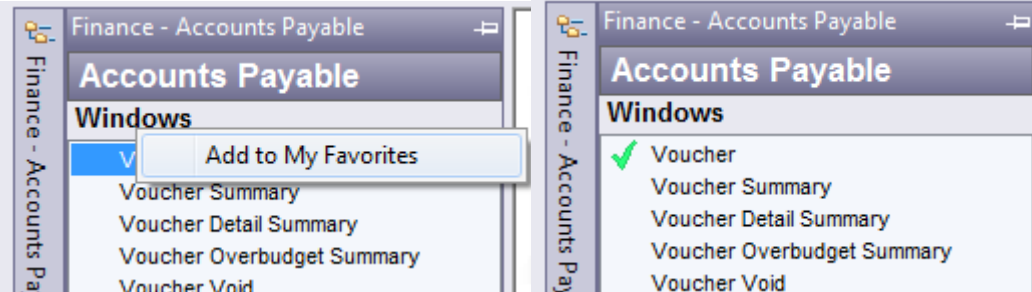
The screenshot shows a web-based interface for configuring a report titled 'Status - Date Range'. The interface includes a 'Create Report' button and a table with three columns: 'Retrieval Argument(s)', 'Value(s)', and 'Wildcards'. The 'Begin Original Hire Date' and 'End Original Hire Date' rows are circled in red.

Retrieval Argument(s)	Value(s)	Wildcards
Primary Status	<input type="text"/>	<input type="checkbox"/>
Secondary Status	<input type="text"/>	<input type="checkbox"/>
Union	<input type="text"/>	<input type="checkbox"/>
Location	<input type="text"/>	<input type="checkbox"/>
Department	<input type="text"/>	<input type="checkbox"/>
Check Location	<input type="text"/>	<input type="checkbox"/>
Unemployment Location	<input type="text"/>	<input type="checkbox"/>
Retire Status	<input type="text"/>	<input type="checkbox"/>
Begin Adjusted Hire Date	<input type="text"/>	
End Adjusted Hire Date	<input type="text"/>	
Begin Original Hire Date	<input type="text"/>	
End Original Hire Date	<input type="text"/>	

You can create your own menu?

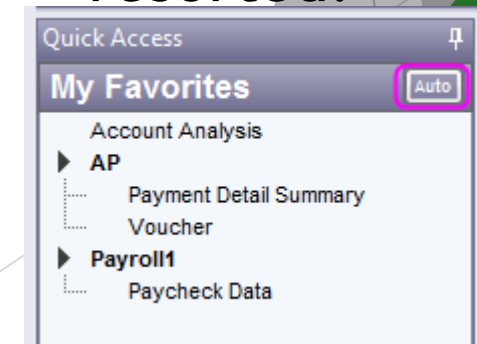
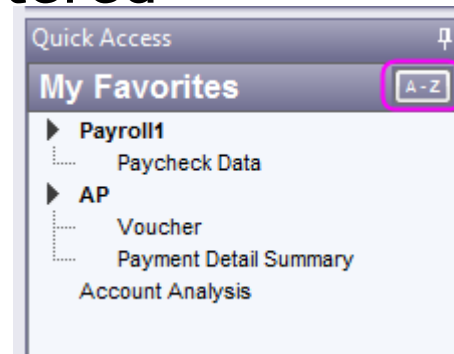


Right-click to add a new group

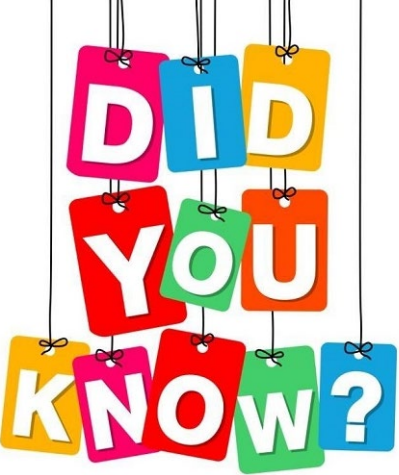


Items are saved in the order they are entered

...but can be resorted.



You can easily change the month/ year by clicking on the calendar icon?



Employee Info

Select Employee ID Retire Demographic Flag

Status Changes Supp Info Basic Info Name/Address 3rd Party Info ACA Info Background Contract Info Photo Custom Info Benefit Elig

Changed	00/00/0000	Job	<input type="text"/>	Leave Type	<input type="text"/>
Prim Status	<input type="text"/>	Location	<input type="text"/>	Leave Reason	<input type="text"/>
Sec Status	<input type="text"/>	Department	<input type="text"/>	Actual Start Date	00/00/0000
Retire Status	<input type="text"/>	Check Loc	<input type="text"/>	Expected Return	00/00/0000
Orig Hire Date	<input type="text"/>	Temp Loc	<input type="text"/>	Actual Return	00/00/0000
Adj Hire Date	<input type="text"/>	EEO Loc	<input type="text"/>	Last Worked	00/00/0000
W-2 Output	<input type="text"/>			Terminate Reason	<input type="text"/>
Exempt	<input type="text"/>			Eligible Rehire	<input type="text"/>

March 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today: 3/31/2025

2025

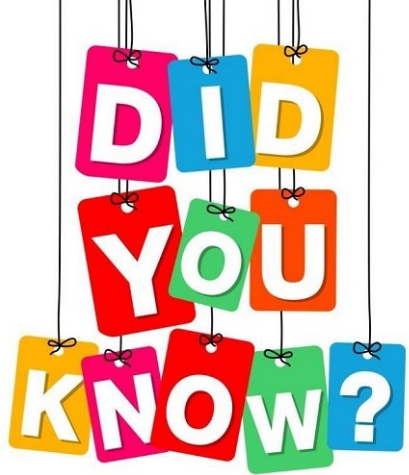
Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

Today: 3/31/2025

2020-2029

2019	2020	2021	2022
2023	2024	2025	2026
2027	2028	2029	2030

Today: 3/31/2025



You can update the affidavits used in SMART eR?

Grouping SMART eR Page	Updateable by Users	User Description	Affidavit/District Note
Employee page			
Direct Deposit	No	This setting is used to determine how the Direct Deposit page functions. Note: If you change the number of accounts allowed at a time, you must contact the region to make sure it is setup to work	You are allowed to have up to (x) account(s) at a time. This change may take a few pay periods to become effective. Payoffs are paid June - August. If you are requesting bank account changes during that time frame, it may not become effective until after August.
Direct Deposit	No	This setting is used to display the electronic signature consent message on the direct deposit page.	I authorize and request my employer to automatically deposit and/or cancel direct deposit for my regular paycheck to the above listed account(s). I understand that my employer or I may terminate this agreement at any time by written notification. Any such notification requires a reasonable time to act upon it. I authorize my employer to debit and/or cancel my account(s) for the purpose of correcting an erroneous credit
Employee Information	Yes	This setting is the message visible to employees, at the top of the page, when changing their addresses.	Address changes may not become effective immediately depending on payroll processing. Please remember that you may need to update your address on your other benefits also.
W4	No	This setting is the message visible to employees, at the top of the page, when changing their W4s.	This change may take a few pay periods to become effective. Payoffs are paid June - August. If you are requesting tax withholding changes during that time frame, it may not become effective until after August.
W-4	Yes	This setting pertains only to updating W4 information. It is displayed as the electronic signature consent message.	Minnesota law imposes a \$500 penalty on any employee who knowingly files an incorrect withholding allowance/exemption certificate. Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete. (This form is not valid unless an electronic signature is submitted.)
Wage Statement	Yes	This setting pertains only to the Wage Statement page for electronic wage statement signatures. It is displayed as the electronic signature consent message.	I authorize that I have read this wage statement and agree to the terms listed in it. The District reserves the right to make any modifications or adjustments in these wage statements during the school year. Please check the box to authorize the transaction.
Employee page			
Wage Statement	Yes	This setting pertains only to the Wage Statement report for section 4.	Contact the business office for terms of employment/contract/paid leave policies for which you are eligible.

Today's Agenda

- Mandatory Reminders
- Random Reminders
- Coming Soon
- Questions

Coming Soon...



Sort options on reports...we simplified!

Calendar Id: S202513 3/20/2025
12:17 PM

Deduct/Benefit Detail - By Calendar

Cal Seq	Check Date	Payee	ID	Name	Amount	Arreared Amount
Deduct Code: CHILDSUPP1			Child support			
0	01/15/2025	MN CHILD	3705	GOOD, PEDRO 3705	\$58.00	\$0.00
0	01/15/2025	MN CHILD	3693	MCFADDEN, LAWRENCE 3693	\$40.00	\$0.00
MN CHILD Payee Total					\$98.00	\$0.00

Deduct Code: DEFCOMP

0	01/15/2025	MSR				
0	01/15/2025	MSR				
0	01/15/2025	MSR				

Deduct Code: DEFMATCH

0	01/15/2025	MSR				
0	01/15/2025	MSR				
0	01/15/2025	MSR				

Deduct Code: DENTAL2FLX

0	01/15/2025	FRSHWTR				
0	01/15/2025	FRSHWTR				
0	01/15/2025	FRSHWTR				
0	01/15/2025	FRSHWTR				
0	01/15/2025	FRSHWTR				
0	01/15/2025	FRSHWTR				

Sort

Sort Select

Report Columns

- ID
- Name
- C Amount
- C Arrear
- Calendar Seq No
- Code
- Deduct Description
- Code
- Compute 9
- Compute 8
- Compute 7
- Compute 6
- Calendar Seq No
- C Total
- Compute 5

Sort Order

Sort Order	Ascending?
Code	
Calendar Seq No	
Payee Code	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>

OK Cancel

Periodic - SSN Verification

Coming
Soon

SSN Verification

Select Year: Last 4 SSN:

ID	Name	Hire Date
<input type="text" value="3861"/>	LINDSEY, ADRIENNE 3861	<input type="text" value="01/21/2025"/>
<input type="text" value="2062"/>	CLEMONS, LULA 2062	<input type="text" value="01/17/2025"/>
<input type="text" value="3860"/>	TERRELL, MARC 3860	<input type="text" value="01/14/2025"/>
<input type="text" value="3858"/>	FAULKNER, ARTURO 3858	<input type="text" value="01/10/2025"/>
<input type="text" value="3859"/>	PITTS, SHANNON 3859	<input type="text" value="01/09/2025"/>
<input type="text" value="3857"/>	GILBERT, JIMMIE 3857	<input type="text" value="01/08/2025"/>
<input type="text" value="2349"/>	LIVINGSTON, LUCIA 2349	<input type="text" value="01/08/2025"/>
<input type="text" value="3856"/>	GREGORY, MARTY 3856	<input type="text" value="12/18/2024"/>
<input type="text" value="3855"/>	BROWN, SANTOS 3855	<input type="text" value="11/25/2024"/>
<input type="text" value="3853"/>	LEVINE, GREGG 3853	<input type="text" value="11/12/2024"/>
<input type="text" value="3854"/>	POTTER, LEE 3854	<input type="text" value="11/10/2024"/>
<input type="text" value="3852"/>	MURPHY, ELENA 3852	<input type="text" value="11/06/2024"/>
<input type="text" value="3851"/>	WINTERS, ARLENE 3851	<input type="text" value="11/04/2024"/>
<input type="text" value="3848"/>	HENDRICKS, LORENA 3848	<input type="text" value="10/22/2024"/>
<input type="text" value="3847"/>	DAVID, WESLEY 3847	<input type="text" value="10/17/2024"/>

Requester Identification Code

HR | Employee Tests

Coming
Soon

3/31/2025
10:27 AM

Employee Tests

Id	Name	Tests	Tester	Test Date	Score	Verified
1127	ABBOTT, CLAUDIA 1127	GRE		3/1/2025		Y
Verified Comments: verified comment test						
		PARAPRO		1/2/2025		Y

Employee Count 1



Questions

