SMART eR

SMART eResources (SMART eR) is a web application that allows employees access to their own data. Each district determines which features to implement to best meet their needs. SMART eR is also used by Administrators to access employee and district information through reports and other methods. Security levels by user are established to protect confidential information. A key feature of SMART eR is the "date effective" entry of data. This allows the user to record entries and changes when received knowing they will not take effect until the date is reached. The district's Finance, Payroll and Human Resource Departments can work from the same database without disrupting the workflow of other areas.

Module Descriptions:

Home Page | Other offers employees a quick view of their Pay, TimeOff, and Messages. It also provides a way for Administration to send announcements and notices to employees which are visible once the employee has logged into SMART eR. District forms can also be viewed and accessed here. Examples include Master Agreements, Procedural Handbooks, Insurance Change Forms, Dependent or Medical Expense Reimbursement Forms and Expense Vouchers. District managers can see who has viewed announcements or made changes online for things such as Direct Deposit and W-4's. Employee Notification Defaults can be established by supervisors and managed by employees. Choices include notifications within SMART eR, email notification, both or none.

My Information provides functionality regarding individual employee personal information.

> **Payroll Items** allows the employee to view their personal information. The district also has the option of allowing employees to update their information. The features include: Pay Stub and year-to-date information, Pay Detail, Notice of Assignments and Contract Information. Once the contracts are created and posted, employees will be able to view and electronically sign their contract. There is also a way for the board to then approve the signed contracts. Other features include: TimeOff and Leave Information, Direct Deposit and W4 information, W2 Forms, 1095 Forms and Flex Benefits. Employees can consent electronically to view their direct deposit W2 and 1095 Forms online.

> **Requests** include Ordering, Leave of Absence, and Vehicles.

> - **Ordering** is a web-based system allowing employees to enter purchasing information. SMART eR currently offers two different methods for users to request orders that transfer into SMART Finance: Online Ordering and Online Order Requisition.
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>   The Online Ordering vendors a district can choose from today include: Broadhead Garrett, Classroom Direct, Express, Follett, Frey Scientific, Hammond & Stephens, Innovative Office Solutions, Lakeshore Learning, Office Depot/Office Max, School Specialty, and Staples. The authorized employee is able to go to the vendor's website and place items in their "shopping cart". They transfer their cart of goods into SMART eR where this request becomes a requisition. It is then transferred into SMART Finance as a purchase order. Once the purchase order is approved, the order can be electronically transferred back to the vendor via SMART eR. A notification is sent to the employee who created the order once the order has been sent back to the vendor.
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>   Authorized district personnel can also create an Online Order requisition (electronic requisition form) in SMART eR to be transferred into SMART Finance for purchase order processing. They simply choose an active vendor from the district's list and key in the items they are requesting. The requisition is transferred into SMART Finance where it

becomes a purchase order. A notification is sent to the employee who created the order when it has been transferred to SMART Finance. It is recommended that all orders are electronically routed for approval/rejection.

- **Leave of Absence** requests can be initiated online. This type of leave includes Maternity or Child Care, Extended Leaves, Military, and Sabbatical leaves of absence. There is also an option to add an attachment such as a doctor's authorization. An automatic email notification is sent to the designated person on staff who receives these types of requests.

- **Vehicle Request** allows applicable employees to request the use of a vehicle.

About Me includes Employee and Dependent Information, Employee Credentials and Licensure, and Emergency Contacts. Employees are able to view their personal information here. The district also has the option of allowing employees to update their information.

Responsibilities are functions related to manager duties. Managers can record and track various activities such as the Supervisor's Report of Accident (SRA), Property Assignments, Employee Announcements and Forms. Managers can also see who has viewed announcements and forms, as well as view SMART eR activity for online changes made by employees.

This section allows managers to electronically approve requisitions and transfer them to purchase orders. Individuals responsible for Affordable Care Act (ACA) reporting are able to transmit the 1094/1095 information to the IRS. Vehicle activity such as usage, approval, scheduling, and maintenance are all managed here as well.

Reports provide managers the ability to conduct data analysis or to view employee information. Through the use of Permissions, managers will only be able to see employees they manage instead of all employees, unless needed.   There are a variety of reports available that include Employee Information, Employee Credentials, Pay, Seniority and Finance reports. Reports can be printed, saved as a PDF or exported to Excel. Paper copies of W4, W2 and 1095 Forms are not necessary because they are always available in SMART eR reports.

Features Include:

Ease of Use
- *Available in most browser formats*
- *Online Real Time Data Entry & Lookup*
- *Data Extractions*
- *Attachment of District Forms & Documents*

Reports
- *Viewed Online or Printed*
- *Exported as Spreadsheets or PDF*
- *Employee Information*
- *Employee Credentials*
- *Pay Reports*
- *Seniority Reports*
- *Financial Reports*
- *ACA 1095 Forms*

Services
- *Software Support & Training*
- *Unlimited Telephone & Email Support*
- *Database Backup & Security*
- *Software Releases*
- *Shared Server / In-house Server*

Functions
- *Multi-Level Security*
- *"Date Effective" Controls*
- *Employee Controlled Update of Information, Direct Deposit & W-4 Online*
- *Immediate Update of Employee Data*
- *Scheduled Batch Uploads for Online Direct Deposit & W-4 changes*
- *Purchase Processing*
- *Access to Multiple Periods*
- *Access to Multiple Years*
- *Employee Self-Serve*
- *Administrative Responsibilities & Reports*
- *Online Signatures & Verification of Identity*
- *Email Notifications to Managers*
- *Employee Notifications*
- *Interface with SMART Finance & SMART HR*
- *Transmit 1094/1095 Information to IRS*

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