



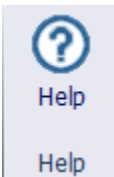
Employee Information Tab

Please contact the Help Desk with questions.

SMART Help Desk 7:30-4:00 M-F

smarthr@erdc.k12.mn.us

320-257-1940



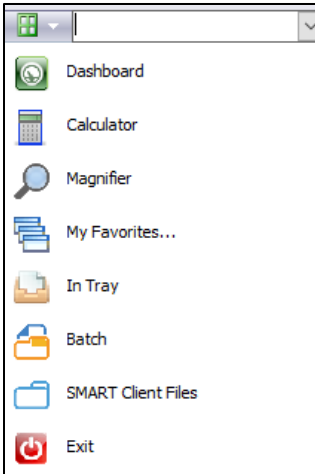
Remember each window has a **Help Button** for more information and explains the window.



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SMART Homepage



This icon is a search tool. If you can't find a window, enter the name in the box and it will open that window.

SMART Client Files – This is where all files are saved.

Company: ISD #

Date: This can be changed to the date you are processing.

Period – GL (AP, AR): This will be the period that matches the date that is entered above.

Messaging/Emailing: This area of the Dashboard can be used to email private data to the Region. If you email the Region or an Auditor – please notify that person on their work email and let them know they have a message on the SMART Dashboard for your school.

Change Password: Where you change your SMART Password

Set Security Questions: Where you can update your Security Questions.

To Do List: Great area to put notes, upcoming changes, reminders.

Employee Information Windows



Employee Info: Window is covered thoroughly in the *New Hire Window documentation*.

Rehire Employee: Window follows the New Hire Documentation.

SSN Search: This window is used to check to see if an employee was previously employed at the district, by looking for their SSN.

New Hire, Paycheck Data, and Terminate Employee Windows: These windows will have detailed information below.

New Hire Window

1. Check the new employee's SSN using the SSN Search Window.
 - a. If they have been employed previously, use the Rehire Window.
 - b. If they are new to the district click Find/Retrieve.
 - i. This creates the new employees ID#
2. On the initial screen, fill out all the information you can. If there is a * it is a required field.
 - a. Employee Type: Defaults to Emp. If your district uses reimbursements or purchasing. All approvers/managers need to have a Director or Manager Employee Type.

3. Status Info

- a. Status Info needs to be consistent when filling out this information. Look at a current employee for reference.
- b. Exempt
 - i. Licensed and Administration (check Minimum Wage, Overtime, and select a Legal Basis)
 - ii. Board Members (check Statute 177)

The screenshot shows the 'Status Info' tab of a form. It contains several fields: Primary Status (dropdown), Secondary Status (dropdown with asterisk), Retire Status (dropdown), Orig Hire Date (dropdown with asterisk), Adj Hire Date (text), Department (dropdown with asterisk), Job (dropdown), Location (dropdown with asterisk), EEO Location (dropdown with asterisk), EEO Code (dropdown with asterisk), Check Location (dropdown), Unemployment Location (dropdown with asterisk), TimeTracker Location (dropdown), Exempt (checkbox checked), Minimum Wage (checkbox), Overtime (checkbox), Statute 177 (checkbox), and Legal Basis (dropdown).

4. Address Info

5. ACA Info

- a. Fill out this information. Even if the new employee has not made a decision about insurance.
 - i. Create a reminder on your calendar to go back and update this data.

6. Supp Info

- a. Fill out as much information as you can.
 - i. Union – used for sorting on reports
 - ii. Folder Nbr – This is the Teachers File Folder Number
 - iii. Seniority – This field can be used for Seniority or there is another option under Employee Management | Maintain Assignments – One Employee.
 - iv. Phone & Email
 - 1. This is needed for MFV in SMART eR

7. 3rd Party Info

- a. AESOP data

8. Benefit Elig

- a. Generally not used.

9. Copy Payroll, Copy Emp Management, and *Copy TimeTracker*

- a. If hiring a new Teacher, Para, etc. – put in the previous employee’s ID, in the ID to be Copied.
- b. Or if you have Built defaults from Employee Templates (*This choice is best for Time Tracker*)
 - i. Check box
 - ii. Select Employee Templates or Employee Groups
 - iii. Add Start Date.

Copy Payroll Copy Emp Management Copy TimeTracker

ID to be copied

Enter Start Dates: Assignment SeR Roles OR Build defaults from Employee Templates
 Code Permissions Employee Template
 Setup Mgmt Start Date

Copy Payroll Copy Emp Management Copy TimeTracker

ID to be copied

Enter Start Dates: Employee Group Schedule OR Build defaults from Employee Group
 Pay Codes Break Employee Group
 Leave Codes Start Date

Paycheck Data Window

Paycheck data holds a lot of important information. Each Tab plays an essential role in processing an employee's payroll.

Pay Codes Tab

Pay Codes	Pay Auth	Deductions	Distribution	Taxes	Retirement								
Sort by: <input checked="" type="radio"/> Pay Code <input type="radio"/> Start Date <input type="radio"/> Stop Date <input checked="" type="checkbox"/> Ascending													
Pay Codes													
Pay Code	Start Date	Stop Date	Pay Base	Annual Contract	Nbr Pds	Earn Sched	Std Hrs	Pay Type	Sal Adj	As Of	Changed By	Date Changed	
PARA_HR	08/21/2022	00/00/0000	14.38	0.00	24	1	.000	01	0.00	04/05/2023	340	8/26/2022 11:36:39	
Double click Rate Table: <input type="text"/>			Hrs/Day			Days/Yr			Hrs/Yr			Freq: ALL	
Overrides: 0.000			0.000			0.000			Paycheck Rate of Pay			Workers Comp 8868	
Notes: <input type="text"/>													
PARA_HR	08/21/2021	08/20/2022	13.42	0.00	24	1	.000	01	0.00	06/03/2022	340	8/26/2022 11:35:12	
Double click Rate Table: <input type="text"/>			Hrs/Day			Days/Yr			Hrs/Yr			Freq: ALL	
Overrides: 0.000			0.000			0.000			Paycheck Rate of Pay			Workers Comp 8868	
Notes: <input type="text"/>													

Sort by: Did you know you can sort pay codes by start date, stop date, ...

Pay Code:

- If the code ends in _HR it is an hourly code.
- If it is a "job" it is a contract code (i.e., Teacher, Para)
- If it is a XCODE – it does not pull Benefits

Nbr Pds: Number of Pay Periods this paycode will be used (usually 24, 12, 6)

Earning Schedule: Pulls on paycheck, determines ACA, informs PERA/TRA of time frame.

Pay Type: Informs PERA/TRA what type of pay is being paid.

Earn Sch	Pay Type	Check Description	Check Seq No	AC
Plan:	Coverage:		0	00/C
00		None		
01		Reg Activ (TRA or PERA)		
02		Extracur & Other Non-Lic Pay (TRA)		
03		Sub & Other Lic Pay (TRA)		
04		Grievance (TRA or PERA)		
05		Retro (TRA or PERA) Qcomp (PERA)		

Rate Table: If the school has Rate Tables built. Find the Rate Table, double click on it and select the correct wage.

Overrides: Here you can override the information that is setup in Pay Detail for that particular pay code.

Paycheck Rate of Pay: Shows on Wage Statements and Direct Deposit as the correct wage for contracted employees.

Workers Comp: Workers Comp is set up on Setup Pay Codes. If you need to override the selection you can do this here. It only affects this employee pay code

Notes: When changing information in Pay Check Data put notes. If you ever leave there is a trail of why the change occurred.

Pay Authorization Tab

Pay Codes		Pay Auth	Deductions	Distribution
Pay Authorizations - FTE				
Start Date	Stop Date	Payroll FTE	Payoff Code	Pay Cycle
09/11/2001	00/00/0000	1.0000000	5 Multiple Check	SEMIMONTH
Annual Salary	Hourly Rate	Std Hrs Pay Pd	Annual Hours	Annualized Wage
0.00	0.0000	.000	.000	0.00

Stop Date: If a stop date is put in, the employee will not show up on Time Card Master or on Payroll Proof.

Payroll FTE: If an employee is 50% the school can place this at .50

Payoff Code: If the employee is paid hourly this will be blank. If the employee is contracted for 24 pays their code would be 3, 4, or 5 Multiple Checks. If the employee gets a lump sum in June, their code would be 1,2, or 3 Lump Sum.

Pay Cycle: How your district pays (semi-monthly, bi-weekly, monthly)

Deductions Tab

Pay Codes		Pay Auth		Deductions		Distribution		Taxes	
Sort by: <input checked="" type="radio"/> Deduct Code <input type="radio"/> Start Date <input type="radio"/> Stop Date <input checked="" type="checkbox"/> Ascending									
Employee Deductions									
Deduct Code	Start Date	Stop Date	Amount	Limit	Payee	Freq	Deduct PPDS	Override PPDS	Ch
DENTALFLX	12/21/2022	00/00/0000	12.82	0.00	DENTAL	ALL	24		
Rate Table: <input type="text"/> Notes: <input type="text"/>									
Double Click Rate Table Box for Rate Information									
DENTALR	01/24/2022	00/00/0000	10.00	0.00	DENTAL	ALL	24		
Rate Table: <input type="text"/> Notes: <input type="text"/>									
Double Click Rate Table Box for Rate Information									

This tab is very similar to Pay Codes.

Key Points:

Limit: Putting in the Fiscal Year Limit. The deduction will stop pulling once it hits that amount.

Payee: Select the payee for this deduction.

Freq: Frequency lets you know which frequency it is setup on. This deduction will only pull according to how the Frequency is setup.

Deduct PPDS: This is the number of times this deduction will be pulled throughout the FY.

Distribution Tab

Pay Codes		Pay Auth		Deductions		Distribution		Taxes	
Sort by: <input checked="" type="radio"/> Pay Code <input type="radio"/> Account Code <input type="radio"/> Start Date <input type="radio"/> Stop Date <input checked="" type="checkbox"/> Ascending									
Employee Distribution									
Pay Code	Account Code	Start	Stop	Percent or Dollar	Amount	Percent	Limit		
PARA	01-100-422-000-740-143	08/21/2022	00/00/0000	Percent	.00	.00%	0.00	Licensed Support	
PARA	01-100-620-000-000-170	08/21/2022	00/00/0000	Percent	.00	43.00%	0.00	Non-Certified Wages	
PARA	01-300-211-000-000-141	08/21/2022	00/00/0000	Percent	.00	6.00%	0.00	Teacher Aides Wages	
PARA	01-100-411-000-740-162	01/24/2022	00/00/0000	Percent	.00	51.00%	0.00	One-to-One Paraprofessional	
PARA_HR	01-100-620-000-000-170	01/24/2022	00/00/0000	Percent	.00	100.00%	0.00	Non-Certified Wages	

Key Points:

Pay Code: These are setup under the Pay Code Tab, if you need to split the way the pay code is paid. Add multiple lines for the same pay code.

Account Code: UFARS Coding used in Finance. If you do not have a code check with

your business manager.

Amount: The pay limit you want to go to this Account Code.

Percent: If a pay code is split between different Account Codes, put the percentage here for each Account Code. The percentage has to = 100%

Retirement Tab

Pay Codes		Pay Auth		Deductions		Distribution		Taxes		Retirement		Ck Delivery	
Retirement													
Plan	Coverage	Start Date	Stop Date	Position Code	PERA EXCLUSION			PERA			TRA		
					Terminated	Exclude	Job Title	Eligibility Date	Position Class	Pro	Pay Period	Elig Code	SEDRA TRA Days
TRA	COORD	01/24/2005	00/00/0000	01	N	000		00/00/0000		N	.00	Teacher/administrator	
PERA	COORD	01/24/2005	00/00/0000	03	N	000	Aide	01/24/2005	F		.00		
PERA	ANNUITANT	01/24/2025	00/00/0000	03	N	003	Activities Worker	00/00/0000	I	N	.00		
NONE	OASDI&MED	01/24/2005	00/00/0000	03	N	001	Activities Worker	00/00/0000	I		.00		

Plan:

- TRA: Teachers, Substitute Teachers, RN, Principal, Licensed Employees
- PERA: Non-Licensed Employees who earn at least \$3,800 per school year or \$5100 year around.
- NONE: Employees who do not qualify for PERA or TRA

Coverage:

- COORD: Coordinated plan- actively participating in TRA or PERA
- ANNUITANT: Retired from TRA or PERA
- OASDI&MEDI: Don't qualify for a plan. OASDI and MEDI will be taken from paychecks.

CK Delivery Tab

Pay Codes		Pay Auth		Deductions		Distribution		Taxes		Retirement		Ck Delivery	
Check Delivery													
Start Date	Priority	Amount	Delivery Option		Bank Routing #	Bank Account	Prenote Date	Changed By	Date Changed				
04/21/2016	99	0.00	<input checked="" type="radio"/> \$	<input type="radio"/> %	091000022	179063	12/19/2008						
			<input type="radio"/> Check <input checked="" type="radio"/> DD-Checking <input type="radio"/> DD-Saving		BankName-For-091000022								
04/21/2016	98	125.00	<input checked="" type="radio"/> \$	<input type="radio"/> %	091000022	042562	04/01/2016						
			<input type="radio"/> Check <input type="radio"/> DD-Checking <input checked="" type="radio"/> DD-Saving		BankName-For-091000022								

Priority: The order in which funds are dispersed.

- 99: Final amount (amount is always blank)
- 98: Funds will go to this account 1st.

Delivery Option: Check, DD (Direct Deposit), Checking, or DD- Savings

Prenote Date: If the prenote date is on the payroll date or after, a prenote will be sent and the employee will receive a check.

Terminate Employee Window

EMPLOYEE INFORMATION | Terminate Employee –

Don't forget employees who are retiring or terminating at the end of the school year. They will need a retirement status change, and changes to deducts/benefits as necessary.

Termination Information	
Termination Date	06/02/2023
Last Date Worked	06/02/2023
Stop Payroll Date	08/31/2023
Stop Benefit Date	08/31/2023
Stop TimeOff Date	06/02/2023
ACA Term Date	06/02/2023 (last day worked)
ACA End Coverage	08/31/2023 (last covered day)
Stop Assignment	06/02/2023
Stop TimeTracker	06/02/2023
Eligible For Rehire	Yes
Secondary Status	RT Retired
Termination Reason	RETIRE Retirement (COBRA)
Retire Status	T
ACA / W-2 Output	Printed
SMART eR Access	Enabled
Stop Software Permissions	06/02/2023
Check Location	

When does your district terminate employee?

If you need to pay an employee after their termination date - enter the Stop Payroll Date and Stop Benefit Date as the later future date. In this case the terminated employee's last day was 6-2 and need to be calculated through payoffs, their stop payroll date 8-31 and stop benefits date is 8-31. **Biggest error is employee terminated on 6-2 and the district enters term date as of 8-31 on their last pay check.**

Difference between Termination Date & Last Date Worked

- Last date worked is simple- it is the last date the employee worked
- Termination date is the date the employee is no longer a district employee.
 - Example:
 - Teacher last day worked 6-4; stated term date in written notification 6-30. District needs to report termination date because if retiring, that is the date used by the retirement fund.
 - If the employee hands in a termination notice in April and states their last day worked/termination will be 6-4. You cannot retro-actively terminate.
 - Enter an ACA end coverage date using the date their insurance coverage would end. Insurance always ends at the end of the month.
- Does the employee have rights in SMART systems or online ordering? Enter the date to stop SMART software permissions?
- Does the employee have a balance remaining in any of their TimeOff accounts? Consider making an entry to reduce the balance remaining to zero or use the Zero on TR Window under TimeOff | Setup TimeOff Plans

Start	Stop	Description	
07/01/2013	00/00/0000	Compensation	Zero on TR Window <input checked="" type="checkbox"/>

- Does the employee have Group Term Life insurance in excess of \$50,000 with the final paycheck so LIFETAX can be processed & correct taxes can be withheld?
- Are there other deductions that you need to collect from them (e.g., Flex, HealthR, HealthFLX)?

Employee Information Reports

SMART offers a variety of reports in several formats.

Payroll - Employee Information	
Employee Information	
▶	Windows
▲	Reports
	Address Changes
	Benefit Import Audit
	Check Delivery
	Custom Info
	Data Sheet
	Deduction Worklist - By Deduct Code
	Deduction Worklist - By Emp Name
	Distribution Worklist - By Acct Code
	Distribution Worklist - By Emp Name
	Employees by Department
	Employees by Id
	Employees By Job
	Envelopes
	Flex Info
	Flex Notices
	Labels
	Name/Address Report - Private
	Name/Address Report - Public
	Pay Authorization Information
	Pay Code Distribution Worklist
	Pay Detail
	Pay Detail - One Employee
	Pay Detail by Location
	Pay Worklist - By Emp Name
	Pay Worklist - By Pay Code
	Retirement Info
	SMART eR MFA Information
	Status - Date Range
	Status - Employee As of Date
	Sub Tracking Worker/Substitute
	Tax/Retire Setup
	Turnover by Location
	Turnover by Union
	Worker Comp Assignments

Check Delivery: Shows which employees elect Direct Deposit or Checks.

Data Sheet: Details all the employee's Employee Information.

Deduction Worklist: See all deductions by deduct code or employee

Distribution Worklist: Shows all employees tied to a specific distribution code or by employee.

Employee by ID: Great list to get all your Employee ID's for Supervisors

Name/Address Report: Great for back-to-school notes.

Pay Authorization Information: Report used to prepare for Payoffs

Pay Code Distribution Worklist: See what Distribution codes are used for specific pay codes.

Pay Detail: Proof if your pay detail is setup correctly for the year.

Pay Worklist: See who has which paycode.

SMART eR MFA Information: See who is setup for MFA and who needs to get you an email or phone number to put in SMART.

Tax/Retire Setup: See which employees are TRA or PERA. If you have employees in other states see which State is tied to their taxes.