KMS Public Schools

SMART eR GUIDE

Aug 2017 – 17.1

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Introduction

SMART eResources (SMART eR) is a web application that allows employees access to their own information. It is up to the district to decide what to implement to meet their needs.

Logging into SMART eR

Warning: If you are using a public computer, certain web browsers may automatically save your PDF documents that have been opened. These may be viewed by other people. To keep your information secure, please log out of SMART eR and delete your files out of this computer's 'Downloads' folder.

Browsers/Software Supported

- Internet Explorer 11.x, Edge -or-
- Safari 9.x, 10.x -or-
- Firefox 48.x, 49.x, 50.x -or-
- Google Chrome 52.x, 53.x
- Adobe Acrobat Reader 9.x, 10.x, 11.x

For **new employees and employees who have never logged into SMARTeR** the User ID is your employee ID number. The Password is the District number plus the last 4 digits of your social security number (no spaces).

District: Verify the district number displayed in this field is your school district. If not, change the dn=xxxx in the URL to select your district number.

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.

Please make sure Javascript is enabled for your browser for SMART eR to work correctly in Internet Explorer 10 & 11.   If it is not enabled you will get the following screen:
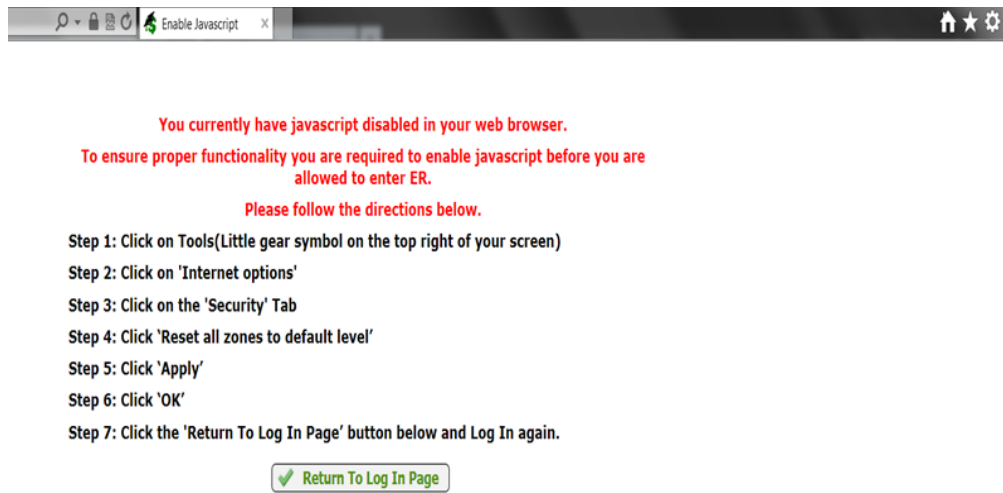
After successfully entering a login id and password, the system will redirect you to a security question setup page. All fields with a colored background need to be entered in order for the page to save.

You MUST check at least 3 security questions. They can include a combination of your own questions and/or predefined ones.

Check Here ☐	**Choose Your Own Question**	
	Answer	
Check Here ☐	**Choose Your Own Question**	
	Answer	
Check Here ☐	**Choose Your Own Question**	
	Answer	
Check Here ☑	**Pre-Setup Question**	What is your favorite color?
	Answer	********************
Check Here ☐	**Pre-Setup Question**	Who was your first boyfriend/girlfiend?
	Answer	
Check Here ☑	**Pre-Setup Question**	What color was the first house you remember growing up in?
	Answer	********************
Check Here ☐	**Pre-Setup Question**	What is your favorite Sports team?
	Answer	
Check Here ☑	**Pre-Setup Question**	What is your Father's middle name?
	Answer	********************

Your password has expired. Your new password must be at least 8 characters in length, cannot be the same as your old password, must contain at least 1 lower case letter, 1 upper case letter, 1 number and 1 symbol.

Current Password	
New Password	
Re-Type New Password	

Please memorize your password as it will not be repeated back to you.

✔ **Save**

Fields with a colored background need to be entered before saving.

* If you forget your password, please use the 'Forgot Password?' button on the SMARTeR Login page to reset it.

* Your security questions can also be changed after successfully logging into the application.

When your changes have been saved successfully, the following message will display.

Success! Your information is updated. Please hit OK to log in again.

OK

Once "**OK**" has been selected you will return to the login window and required to log in using your new password.

It will then display a 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 SMARTeR 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.

Changing Password and Security Questions

Password and **Security Questions** can be maintained or changed using links provided in the upper right corner of the **Home** page.

Select **Logout** to exit SMART eR.

Announcements and District Forms

Announcements, Notifications, District Forms and/or **Employee Forms** appear on the **Home** page. This module provides a way for Administration to send electronic announcements and notices to employees which are visible once the employee has logged into SMART eR.

Once you are logged in, the Announcements page will be displayed.

Below is an example of what is displayed. Any "**Announcements**" sent to the employee will be referenced on this page.

Click on the "**View**" button and the message will display in the message box section.

To delete old messages that you are no longer interested in click the "**Delete**" button.

To access any forms that have been attached, click on the "**District Forms**" button. Click on the "**View**" tab to view and/or print the forms.

SMART eR Menu Items Defined

Navigating SMART eR

The **Home** page will be the same for everyone. It is the main page which SMART eR starts from.

Key Menu Items include:

A- **My Frequent Places:** This feature will track the pages visited most frequently by the employee. It will list the top 5 most accessed places. *The pages/reports are also available in the normal menu. The user will see nothing until they access a page.*

B- **Home:** This feature allows the employee to <u>directly access</u> the two most frequently used pages; **Pay Stub and TimeOff**. The page displays the most current values available. Detail can be viewed by clicking on the link to **View Detail**. *Old pay stubs can also be found under the link. If a user has not been paid, or the district is not using TimeOff, then the box will not display.*

C- **Logged in as:** All employee maintenance for SMART eR is located in one place. The links to **Change Password** or **Security Questions** will always display on the **Home** page so they are easy to find. *We RECOMMEND that users logout of SMART eR if on a public computer to keep their data safe.*

D- **Menus (left sidebar):** Menus can be opened or closed by clicking on the '+/-' sign.   *SMART eR automatically opens to an employee's information to save them clicks.*

E- **Browsers (bottom of page):** The browsers supported for the current release of SMART eR can be found at the **Visit our About page** link. *These are adjusted every release based on the users accessing SMART eR statewide.*

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 their 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.

TimeOff

TimeOff and **Pay Stub** are displayed on the **Home** page. The page displays the most current values available. Detail can be viewed by clicking on the link to **View Detail**.

✓ This allows you to view the **TimeOff** plans, balances and usage.

From "**Home**" page, select "**View Timeoff Detail**"

It will open the **TimeOff** Information.

- Use the drop down box to select a different year to view
- Click '+' to view detail
- Click '-' to hide detail

This screen shows the different TimeOff Plans that are available to the employee.

Time off information from prior years can also be viewed by selecting the appropriate date range.

To print your entire Timeoff, click on the **Print Timeoff Detail** button.

Pay Stub

Pay Stub and **TimeOff** are displayed on the **Home** page. The page displays the most current values available. Detail can be viewed by clicking on the link to **View Detail**. Year-to-date pay information can be viewed by clicking on the link to **View YTD Pay.**

✓ This allows you to view your current and old pay stubs as well as your Year to Date Pay and your specific Pay Information.

From the "**Home**" page, click on the "**View Pay Stub Detail**"

By clicking here a listing of all previous pay periods will appear.

View Pay Stub Detail

New links to help determine what your withholdings should be set to.

This shows the detail of the last processed payroll.

This shows where and how much was deposited into the employees account.

This shows the detail of the timecards processed in this payroll. (*This may not appear if not paid by timecard as in sample picture.*)

New option to preview pay stub and will NOT save to the computer – scroll down to see entire document.

To save the Pay Stub/print only that information, click on the **Print Entire Pay Stub** button. *This is the formal report that can be printed when applying for a loan from a bank or needing any other official documentation. Caution: on a public computer – this will save it to where the browser default saves to unless you specify somewhere else. Typically it is to the "downloads" folder.*

An Adobe document will ask to open.
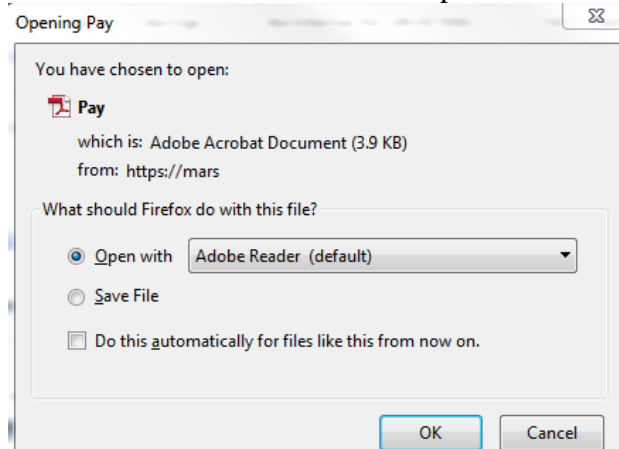
You can choose to open it or save the file.

This area shows what type of pay and the gross amount of pay for the specific pay period. If the employee earns multiple types of pay each pay will be

This section shows the amount of District match that the employee is eligible for under their work agreement.

This area shows deductions and the amount withheld from the employee's pay check.

These deductions along with the amounts withheld for state, federal and FICA taxes are subtracted from the gross pay to get to the employee's net pay.

To get to older paystubs, click on the **Other Pay Stubs** button.
A list will appear to choose from.

Pay Summary

Select a year from the list to see that year's paychecks... 2016 ▾

Click on a button below to see that pay stub detail...

Date/Amount

$ 10/14/2016 - $1,318.70
$ 09/30/2016 - $1,550.52
$ 09/15/2016 - $1,555.28
$ 09/01/2016 - $1,350.44

> If the employee simply wants to know what their deposits were by calendar year, they can use the drop down box to select the year. This will display Net amounts by check date.
>
> If you wish to see more detail, click on the date/amount for the particular pay period and the detail for that pay period will be displayed.

Year to Date Pay

From the "**Home**" page, click "**View YTD Pay**"

View Timeoff Detail

Timeoff Description	Balance/Hours
Vacation	265.0000
Sick Leave - 12 Mo	1092.0000
Misc Leave Support	-105.0000

View Pay Stub Detail

Paycheck Date	Amount
05/16/2016	$2,030.73

View YTD Pay

Year To Date Pay

This page provides a summary of your year to date pay information. To see all of the detail and/or print a format that is acceptable for banks, click on the View/Print Entire YTD Pay button.

📄 **Print Entire YTD Pay**   🧮 **Federal Withholding Calculator**   🧮 **MN Withholding Calculator**

HENRIETTA BOONE
Year: 2017 ▾ Earnings through 05/05/2017

Summary

	Gross	Fed Tax	State Tax	Medicare	OASDI	EIC
Calendar YTD	$16226.98	$1441.26	$638.61	$235.29	$1006.07	

> This screen shows the employee the calendar year to date info. To see a different year, click on the drop down box and select the year you wish to view.
>
> This screen gives the employee the year to date information on pay, taxes, deductions and district paid benefits.

YTD Pay

Whizbang Public Schools
202 Anywhere Road
Somewhere, MN 123456789

HENRIETTA 14820 BOONE
PO Box 14820
Somewhere, MN 12345

Original Hire Date: 11/12/2013

Adjusted Hire Date: 11/12/2013

Calendar Year: 2017

Pay	Amount	Deductions (* = Pre-Tax)	Amount
Hourly EEs - Overtime	$123.36	PERA*	$1,054.75
Secretary Sub Hourly	$16,103.62	Total:	$1,054.75
	$16,226.98		

Benefits	Amount	Taxes	Amount	Taxable Wages
Health Insurance	$7,938.90	Federal Income Tax	$1,441.26	$15,172.23
Medicare - Employer	$235.29	Medicare	$235.29	$16,226.98
OASDI - Employer	$1,006.07	MN Income Tax	$638.61	$15,172.23
PERA Board	$1,217.02	OASDI	$1,006.07	$16,226.98
VEBA-Boardshare	$1,200.00	Total:	$3,321.23	
Total:	$11,597.28			

> Any deduction followed by an "*" is a pre-taxed deduction.

For help on choosing your withholdings, the links to the Federal and MN withholding calcuators are provided at the top.

Personal Information can be accessed under the **Home** menu | **My Information**. Listed beneath that are two additional menus allowing employees to view their personal information; **Payroll Items** and **About Me**. The district also has the option of allowing employees to update their information online.

Payroll Items

1. **Payroll Items**
   a) Contract Information
   b) Direct Deposit
   c) Pay Information
   d) ACA Form 1095
   e) W-4
   f) W-2

Contract Information

Direct Deposit

Employees can view their district deposit information online.

If allowed by the District, the employee can change the amounts allocated to their bank account(s) online. An electronic signature is required. **If you currently have more than one direct deposit account active, <u>you must re-enter the information for each account.</u>** Changes made will not be active until it is signed by the employee and then moved into payroll through a batch job.

An Electronic Signature is required. The employee is asked to authorize the change and verify their identity.

The employee can view an example of where to locate the routing number and account number by clicking on the **View Check Example** button.

Pay Information

If your district uses Pay Detail, employees can view their pay information online. Below is an example of a teacher's information for their basic assignment and additional pay. Employees can view information from prior years by using the drop down box to select a different year.

Pay Information

Fiscal Year: 2016 ▼
Your basic assignment for the 2015-2016 school year is: Guidance Counselor
Notice of Assignments for the 2015-2016 School Year.

Your Salary for the 2015-2016 school year for basic services is:

Start Date	Stop Date	Pay Code	Lane	Step	Factor 3	FTE	Unit PD Amount	Contract Annual Amount	Hrs/Day	Day/Yr	Hrs/Yr	Contract Hourly Rate	Contract Daily Rate	Unit PD Annual Amount
09/01/2015		TEACHER	MA+10	18	*	1.0000	$0.00	$61,835.00	8	183	1,464	$42.24	$337.90	$0.00

Additional Pay

Start Date	Stop Date	Pay Code	Lane	Step	Factor 3	FTE	Unit PD Amount	Contract Annual Amount	Hrs/Day	Day/Yr	Hrs/Yr	Contract Hourly Rate	Contract Daily Rate	Unit PD Annual Amount
05/01/2016	05/31/2016	XADVISOR				1.0000	$0.00	$859.50	0	0		$0.00	$0.00	$0.00

ACA Form 1095

Employees can view and print their 1095 information. The first time a user goes to the ACA Form 1095 page, the "Consent" message will come up. If the employee consents **Yes** the IRS allows the employer to furnish the form electronically. Generally, this means the employee will receive their form sooner than a paper form, and be more convenient for them as well. Employees can view prior years by using the drop down box to select a different year.

The most current form will now be available for preview on the page. To save a copy of the report or print it, click on the View Form button circled above. *Caution: on a public computer – this will save it to where the browser default saves to unless you specify somewhere else. Typically it is to the "downloads" folder.*

W-4 and W-2

Employees can view online what is currently being claimed for tax withholding based on their completed Form W-4. The Form W-2 and W-2 Information sheet can also be viewed. 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 the current and prior years can be viewed.

W-4

Change W-4 Withholding Amounts

Districts can allow an employee to change their W-4 withholding amounts online for both federal and state reporting. An Electronic Signature is required. The employee is asked to authorize the change and verify their identity. *See Page 13 – Direct Deposit – for an example of this process.* Changes will not be active until it is signed by the employee and then moved into a payroll date waiting to calculate.

The employee can view an example of the Federal or State W-4 by clicking on the **View Blank W-4** button, as applicable.

W-2

In order to view and print your W-2 on-line you must consent to Electronic W-2's when you access this window.

The form selected will now be available for preview when clicking on the "Go" button.

From the preview page, to save a copy of the report or print it, click on the "Print W2" button. *Caution: on a public computer – this will save it to where the browser default saves to unless you specify somewhere else. Typically, it is to the "downloads" folder.*

W-2 Information Sheet

W-2 Information Sheet is available to all employees, even if the employee has not consented to an electronic W-2.

The **About Me** group can be accessed under the **Home** menu | **My Information**. This section contains the employee's personal information, emergency contacts and dependent information. Districts have the option of allowing the employees to make changes to this information.

About Me

2. **About Me**
    a) Dependents
    b) Education
    c) Emergency Contacts
    d) Employee Information
    e) Licensure
    f) Medical Information

Dependents

This screen will show you who the district has listed as your dependents.

The district has the option of allowing the employee to make changes to this information.

Education | Continuing Education

This screen allows the employee to view the information the district has on file for their education along with continuing education credits *(e.g. Lane Changes).*

Emergency Contacts

This is where the District would like all employees to add, update, or delete the individuals they would like contacted in the event of an emergency situation. If there are contacts in the district's database, they will be listed here.

The employee can also change the information that is currently listed by clicking on the "Edit" button *(if visible).*

The employee can then make the changes and save. If there is a contact that is no longer valid, the employee can select that contact and delete it.

Employee Information | Address

This screen shows the current information that the district has on the employee.

The district has the option of allowing employees to make changes to their address. There is also additional information that can be updated by the employee if the district chooses to make that option available.

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Employee Information | Contact

Employee Information | Other

Medical Information

Licensure | Teaching Licenses

Teaching license information is viewable here, including expiration dates. A link to the MDE website is provided so the employee can view their record on file with the State of Minnesota.

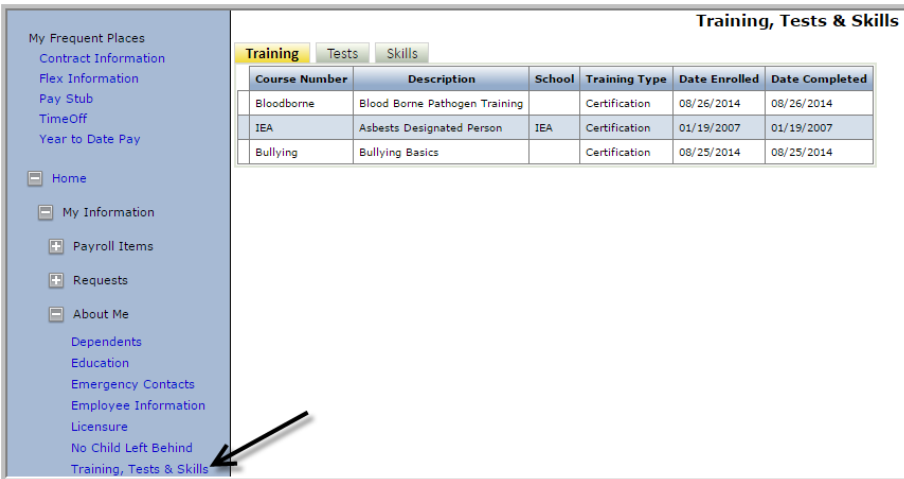## Licensure | Other Licenses/Certifications

This section tracks other licenses and certifications such as Asbestos Certification, Boiler License, CPR certificate, Driver's License, Occupational Therapist, and Registered Nurse.

Training, Tests & Skills

Training, Tests & Skills can be viewed in this window.

Additional Training, Tests and Skills can be used to track other types of training for staff and the date the training was completed.
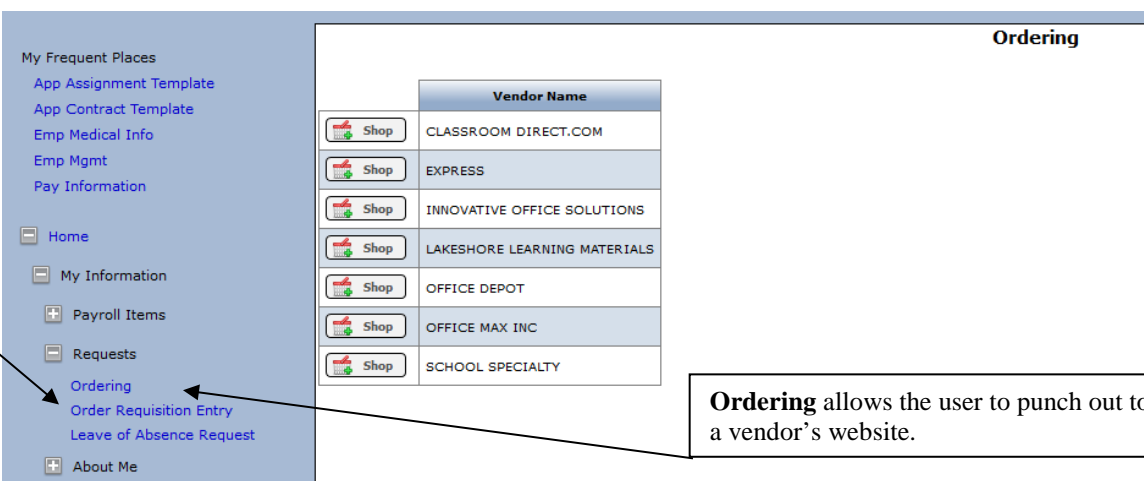
Requests

Requests includes **Ordering, Leave of Absence Request** and **Vehicle Request**. This group 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.

Ordering

This is a web-based system for non-SMART Finance users to enter purchasing information and perform all the functions related to Purchasing. SMART eR currently offers two different methods for authorized users to request and/or place orders that transfer into SMART Finance: **Ordering** and **Order Requisition Entry**.

To create an Online Order Request, click on **Order Requisition Entry**.

Key in the information and route for approval.

Ordering allows the user to punch out to a vendor's website.

Ordering

The first method is **Ordering** for specific outside vendors via a "punch-out" system. The authorized employee chooses from a predetermined list of approved vendors. They are able to go to the vendor's website and place items in their "shopping cart". They transfer their cart of goods into a requisition or purchase order. Once the purchase order is approved, the order can be electronically transferred back to the vendor via SMART eR.

Order Requisition Entry

The second method is the **Order Requisition Entry** which allows an order request in SMART eR to be created and routed for approval, then transferred into SMART Finance purchase order processing. They do not go to a vendor's website for this process. They simply choose an active vendor from the list and key in the items they are requesting. The request is transferred into a purchase order after approved.

Responsibilities

The **Responsibilities** group includes **Vehicles** and **Supervisor's Report of Accident.** Like the Requests group, it 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.

Supervisor's Report of Accident

Supervisor's Report of Accident (SRA) is used to notify the district office of an injury. Supervisors can be given access to this page to complete the form. A confirmation email is 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.

Change **Password** and Security Questions

In the top right of the home page, you will find profile options.

Logged in as : JAIME GLOVER
Logout
Change Password
Setup Security Questions
Notification Setup

Home

Your Password must be a minimum of 8 characters in length and contain at least 1 capital letter, 1 letter, 1 number and 1 symbol. The password is case sensitive.

You can change your password and security questions on this page.

Current Password

New Password

Re-Type New Password

✔ Save

Fields with a colored background need to be entered before saving.

In order for an employee to reset their password three (3) security questions must be setup.

An employee can set up one, two or three of their own questions, or choose the "Pre-Setup Questions", or a combination of these two options.

Three (3) questions must be set up.

ic Schools
ere, MN 12345-6789
1-2222

Logged in as : JAIME GLOVER
Logout
Change Password
Setup Security Questions
Notification Setup

Setup Security Questions

You MUST check at least 3 security questions. They can include a combination of your own questions and/or predefined ones.

Check Here ☐	Choose Your Own Question / Answer	
Check Here ☐	Choose Your Own Question / Answer	
Check Here ☐	Choose Your Own Question / Answer	
Check Here ☑	Pre-Setup Question / Answer	What is your favorite color? / ********************
Check Here ☐	Pre-Setup Question / Answer	Who was your first boyfriend/girlfriend?
Check Here ☑	Pre-Setup Question / Answer	What color was the first house you remember growing up in? / ********************
Check Here ☐	Pre-Setup Question / Answer	What is your favorite Sports team?
Check Here ☑	Pre-Setup Question / Answer	What is your Father's middle name? / ********************

Logout

In the top right of the home page, you will find profile options. Select **Logout** to exit SMART eR.

Whizbang Public Schools
202 Anywhere Road Somewhere, MN 12345-6789
Phone: (218)111-2222
Need Help? District@email.address.com

Logged in as : SHAWN COOKE
Logout
Change Password
Setup Security Questions
Notification Setup