

SMARTXL

Employee Information REP

Simplified
Management
Analysis
&
Reporting Tool

SMART: Product of Computer Services
Revised 6-5-18

THE WAYNE COUNTY REGIONAL EDUCATIONAL SERVICE AGENCY

Board of Education • James S. Beri • Mary Blackmon • Danielle Funderburg • Lynda S. Jackson • James Petrie • Randy A. Liepa, Ph.D., Superintendent

Table of Contents

Module Overview	4
Security	4
User Permissions.....	4
Opening the Module	5
Main Screen	5
Assignment Tab	6
Add Assignment.....	6
Delete Assignment	7
Credentials Tab	8
Add Credentials	8
Delete Credentials.....	9
Demographics	10
Payroll Tab.....	10
HR Tab.....	11
REP Tab.....	11
Evaluation Tab.....	13
Add Evaluation	13
Delete Evaluation.....	14
Update REP.....	14
Audit Trail.....	15

Module Overview

Employee Information (EI) is SMART application to input employee information. Information keyed in EI updates into the Employee Analysis and REP Modules overnight or when updated manually.

Security

The authorized box must be checked in SMART Security to allow the user to view/update the data. The administrator box must be checked to allow the user to assign this module to other users.

Group	Name	Authorized	Administrator
Finance	PO Maintenance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	Purchase Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	Transaction Analysis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H/R	Benefits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H/R	Employee Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H/R	Leave Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H/R	State R.E.P	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

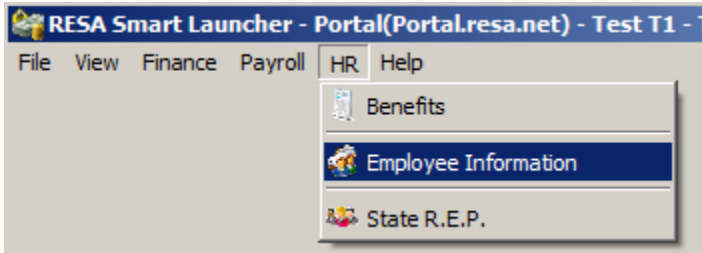
User Permissions

Select appropriate permissions for the module. To process REP, you will need Access Social Security Number, Credentials, Demographics-HR, Demographics-REP, Employee Life Cycle, Evaluation, and REP-Assignment Permissions.

Description	Authorized
~Demographic (Original) - { OBSOLETE }	<input type="checkbox"/>
~Demographic (Ver. 2.1) - { OBSOLETE }	<input type="checkbox"/>
Access Social Security Number	<input checked="" type="checkbox"/>
Allow Add Action	<input type="checkbox"/>
Contact	<input type="checkbox"/>
Credentials	<input checked="" type="checkbox"/>
Demographic (HR)	<input checked="" type="checkbox"/>
Demographic (Payroll)	<input checked="" type="checkbox"/>
Demographic (REP)	<input checked="" type="checkbox"/>
Demographic (Retirement)	<input type="checkbox"/>
Earnings / Deductions	<input type="checkbox"/>
Education	<input type="checkbox"/>
Emergency	<input type="checkbox"/>
Employee Life Cycle	<input checked="" type="checkbox"/>
Evaluation	<input checked="" type="checkbox"/>
Extra	<input type="checkbox"/>
Hire	<input type="checkbox"/>
Pay Distribution	<input type="checkbox"/>
Property	<input type="checkbox"/>
REP - Assignment (Original)	<input checked="" type="checkbox"/>
REP - Miscellaneous (Original)	<input type="checkbox"/>
Seniority	<input type="checkbox"/>
Tax	<input type="checkbox"/>
Wage	<input type="checkbox"/>

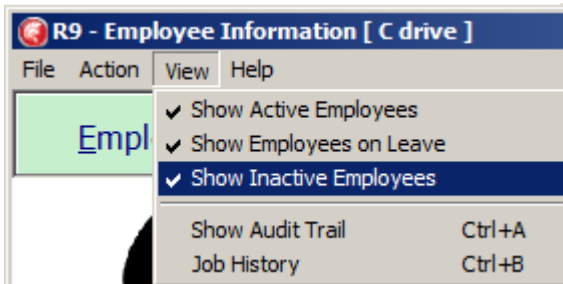
Opening the Module

Go to HR-Employee Information or select the Employee Information icon.

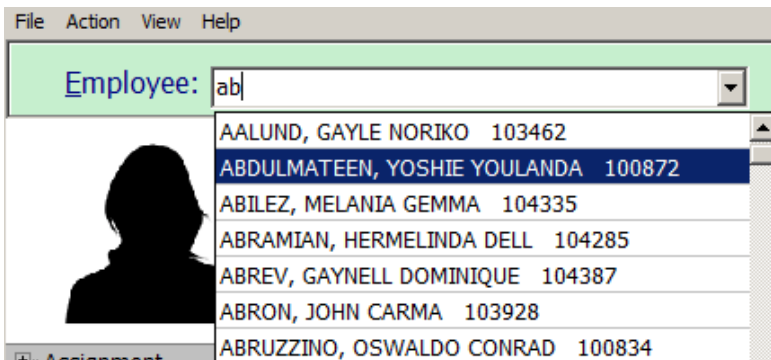


Main Screen

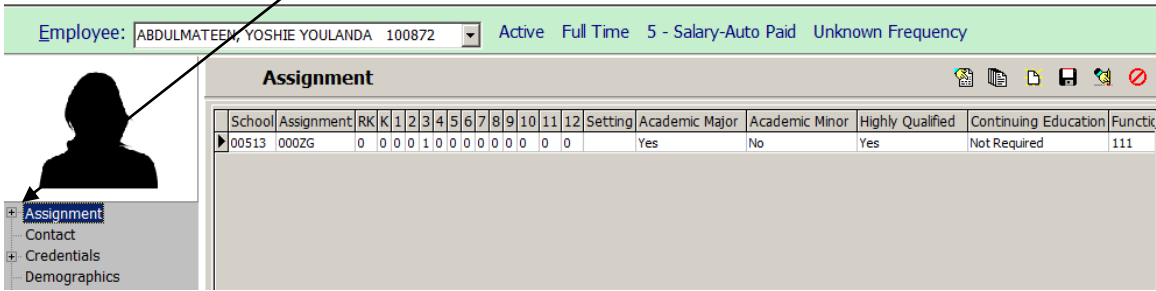
The employee list defaults to showing all active, inactive and on-leave employees. To adjust who shows up in the list, click on View and un-check the types you want excluded.



The employee list can be searched by employee name or employee number. When the Employee dropdown is clicked a list of employees is shown. To search for the employee, either begin typing the name or click on the slide bar to move down the list and then click on the employee.




On the tree, click on the + to expand the tabs and show all records under each tab.





Shortcut Icons have been set up on the Main Screen.





The  icon is a shortcut to a Pay Profile Report.

The  icon is a shortcut to the Audit Report which will show all changes that have been made to records. It shows what change was made, who made the change, and when the change was made.

The  (paper with the sunshine) icon is for a new record.

The  icon is to save changes.

The  icon is to delete the record.

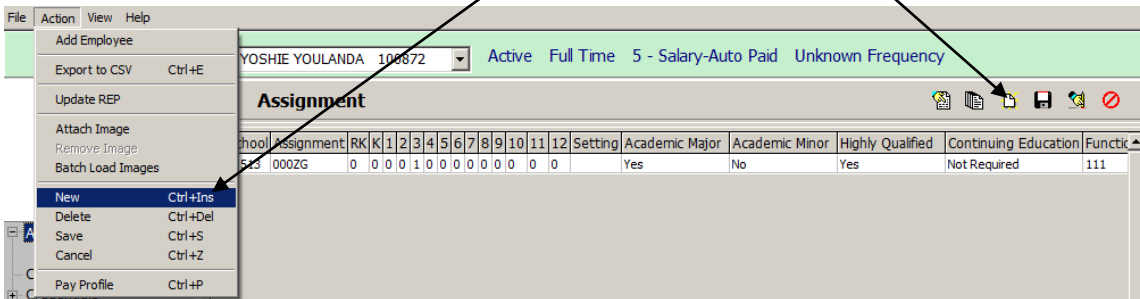
The  icon is to cancel changes made on the current screen since it was last saved.

Assignment Tab

A REP Assignment needs to be keyed for every employee. If the employee is in multiple locations or positions, you will need to key multiple assignment records.

Add Assignment

To add an assignment, click on Actions – New or click on the paper with the sunshine.



A blank template will come up. Use the dropdowns to key in the assignment information.

Employee: ABDULMATEEN, YOSHIE YOULANDA 100872 Active Full Time 5 - Salary-Auto Paid Unknown Frequency

Assignment

School Assignment Show All

School: Douglas Elementary 3-4 Campus Assignment Code: 000ZG - General EL K-5 all, K-8 Self-Cor

Grade Level OR Educational Setting

GRADE Current Grade Assignment: RK K 1 2 3 4 5 6 7 8 9 10 11 12

SETTING

School

Highly Qualified: Yes Function: 111Elementary School

Academic Major: Yes Pay Distribution: (111 - 100%)

Academic Minor: No Classes Taught: 1 FTE: 1

Admin Cont. Edu.: Not Required REP Hrly Override Rate: 0 Hourly Rate:

Delete Assignment

To delete an assignment, click on the row of the assignment in the tree you want to delete and then click on Actions – Delete or click on the delete icon.

File Action View Help

- Add Employee
- Export to CSV Ctrl+E
- Update REP
- Attach Image
- Remove Image
- Batch Load Images
- New Ctrl+Ins
- Delete Ctrl+Del**
- Save Ctrl+S
- Cancel Ctrl+Z
- Pay Profile Ctrl+P

Employee: YOSHIE YOULANDA 100872 Active Full Time 5 - Salary-Auto Paid Unknown Frequency

Assignment

School Assignment Show All

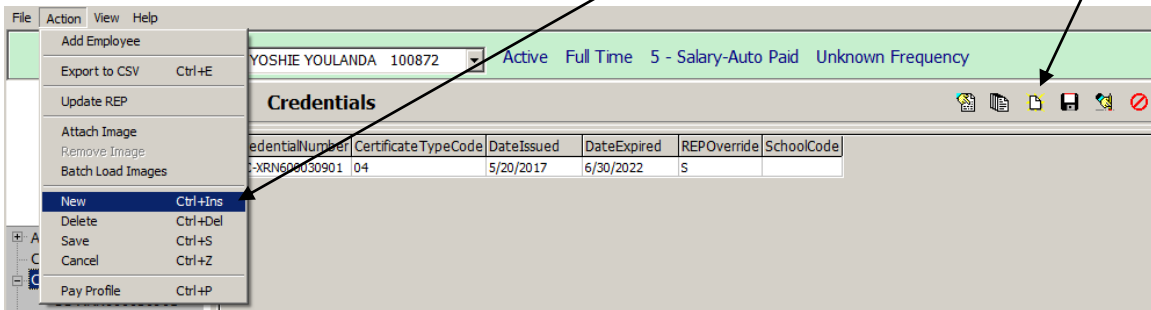
School: Douglas Elementary 3-4 Campus Assignment Code: 000ZG - General EL K-5 all, K-8 Self-Cor

Credentials Tab

The Credentials Tab shows the credential and endorsement information. If the employee has more than one credential, you will key multiple credential records.

Add Credentials

To add a credential, from the credential tab, click on Actions – New or click on the paper with the sunshine.



A blank template will come up. Use the dropdowns to key in the credential information: type, sponsoring institution, credential number, issued date, and expires date. To add endorsements, the credential information must be saved (click on save icon) first.

If there is more than one credential for a person, multiple credentials can be added.

The screenshot shows a form titled 'Certificate, License, or Credential'. It has several input fields and a checkbox. An arrow points to the 'REP Override' checkbox.

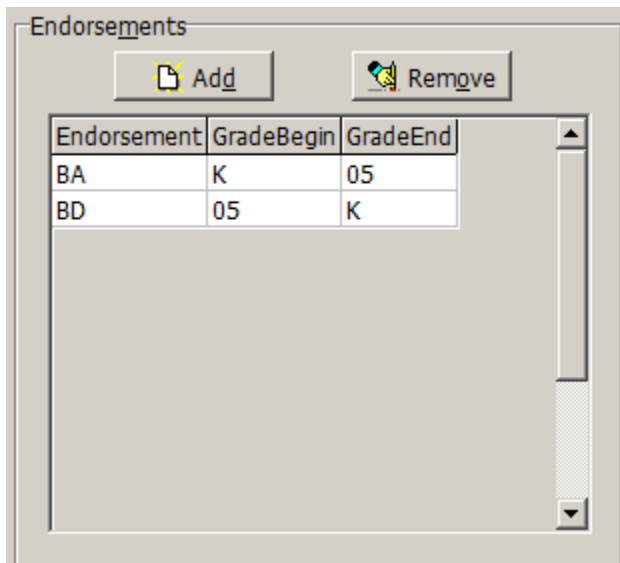
Credential Type: 03 ELEM PROVISIONL
Sponsoring Institution: 02 Eastern Mich Univ
Credential Number: PF0000000456478
Issued: 2/26/2014
Expires: 2/26/2020
 REP Override

Endorsements

Endorsement	Grade Begin	Grade End
-------------	-------------	-----------

If there is more than one valid credential, the REP override must be checked off to manually identify which credential should be submitted to CEPI.

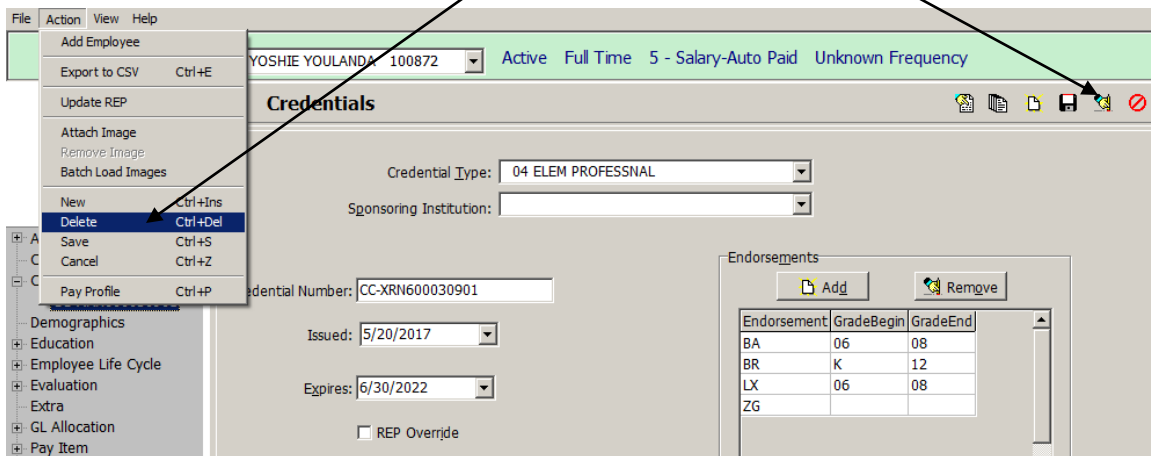
To add the endorsement codes, click on the Add button and use the dropdowns to make the selections. The endorsement code is in three pieces: the alpha endorsement code from the certificate, the beginning grade level, and the ending grade level.



To remove an endorsement, click on the endorsement to be removed and then click the Remove button.

Delete Credentials

To delete a credential, click on the row of the credential you want to delete from the credential tab and then click on Actions – Delete or click on the delete icon.




Demographics

The Demographics Screen is separated into four tabs: the Payroll Tab, the HR Tab, The REP Tab, and the Retirement Tab. For REP, you will at least need the HR Tab and the REP Tab.

Payroll Tab

The Payroll Tab includes name and address information that is keyed when adding an employee. Union, Pay Code, and HR Location changes are also keyed here.

Employee: Active Full Time 5 - Salary-Auto Paid Unknown Frequency



- Assignment
- Contact
- Credentials
 - CC-XRN600030901
- Demographics**
- Education
- Employee Life Cycle
- Evaluation
- Extra
- GL Allocation
- Pay Item
- Property
- Seniority
- Tax
- Wage

Demographics

Payroll | HR | REP | Retirement

Name

First: Middle: Last:

Suffix: Title:

Address

Address 1:

Address 2:

City: State: Zip Code:

Country:

Work Email:

Payroll

Check Location: Union:

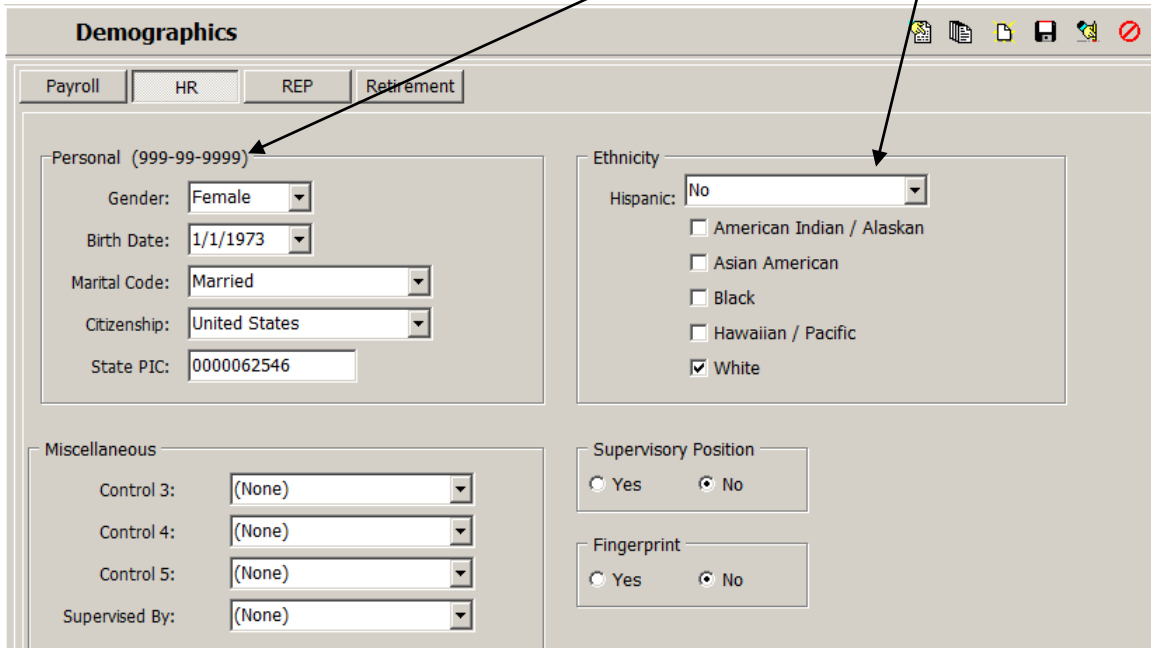
HR Location: Pay Code:

Department: Workers Comp:

HR Tab

The ethnicity information can be updated from the HR Tab. Using the dropdown, yes or no must be selected for Hispanic. One or more of the boxes can then be checked off below.

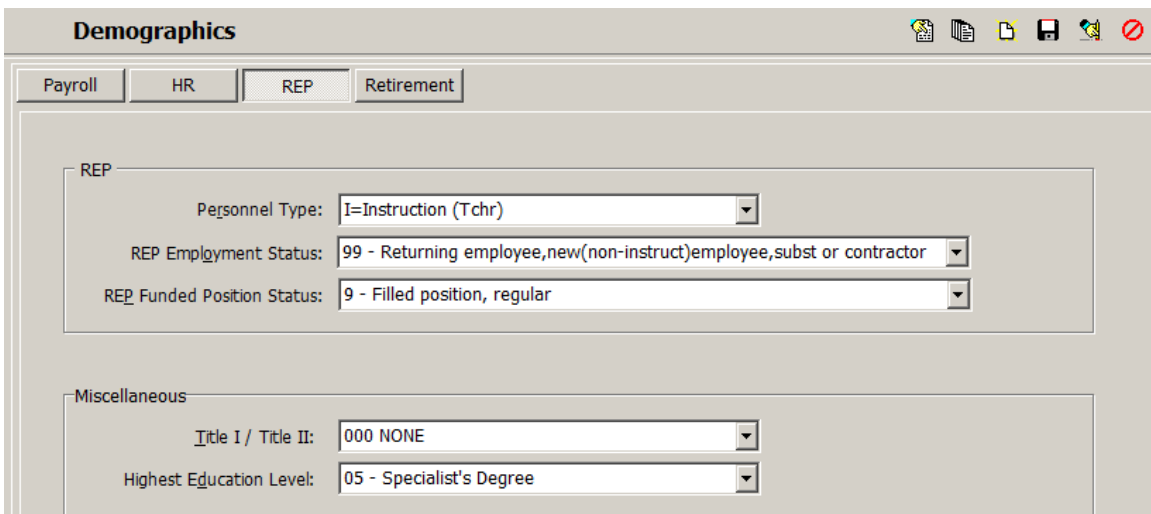
If you have the Special Permission in Security to Access the Social Security Number, it will be visible on the HR Tab.



The screenshot shows the 'Demographics' window with the 'HR' tab selected. The 'Personal (999-99-9999)' section contains the following fields: Gender (Female), Birth Date (1/1/1973), Marital Code (Married), Citizenship (United States), and State PIC (0000062546). The 'Ethnicity' section includes a 'Hispanic' dropdown menu set to 'No' and several checkboxes: American Indian / Alaskan, Asian American, Black, Hawaiian / Pacific, and White (checked). The 'Miscellaneous' section has Control 3, 4, and 5 all set to '(None)', and Supervised By set to '(None)'. The 'Supervisory Position' and 'Fingerprint' sections both have 'No' selected.

REP Tab

The REP Miscellaneous Tab includes REP specific information.



The screenshot shows the 'Demographics' window with the 'REP' tab selected. The 'REP' section contains: Personnel Type (I=Instruction (Tchr)), REP Employment Status (99 - Returning employee,new(non-instruct)employee,subst or contractor), and REP Funded Position Status (9 - Filled position, regular). The 'Miscellaneous' section includes Title I / Title II (000 NONE) and Highest Education Level (05 - Specialist's Degree).

Personnel Type

The Personnel Type identifies the type of employee. This field must be populated for the employee to pull into the State REP Module. Select the type from the dropdown and click on the save icon.

A=Administration	A
I=Instruction (Tchr)	I
N=Non Instruct >= .5	N
P=Parapro Aide Assis	P
S=Substitute Teacher	S
X=Non Instruct < .5	X
Y=Sustit Para/Aide	Y

Note: If no Personnel Type is selected and saved, the REP Employment Status and the REP Funded Position Status dropdowns will not be available.

REP Employment Status

For new teachers in the first three years of teaching will be either a 97 (new to teaching, not new to district) or a 98 (new to teaching). All other active employees will be a 99. Terminated employees will show an 18 and retired employees will show a 19.

18 - Other	18
19 - Retired (position will be fil	19
97 - New to teaching, not new	97
98 - New teacher	98
99 - Returning employee,new(t	99

REP Funded Position Status

The REP Funded Position Status was previously in the SMART REP Module only. Use the dropdown to select the appropriate status.

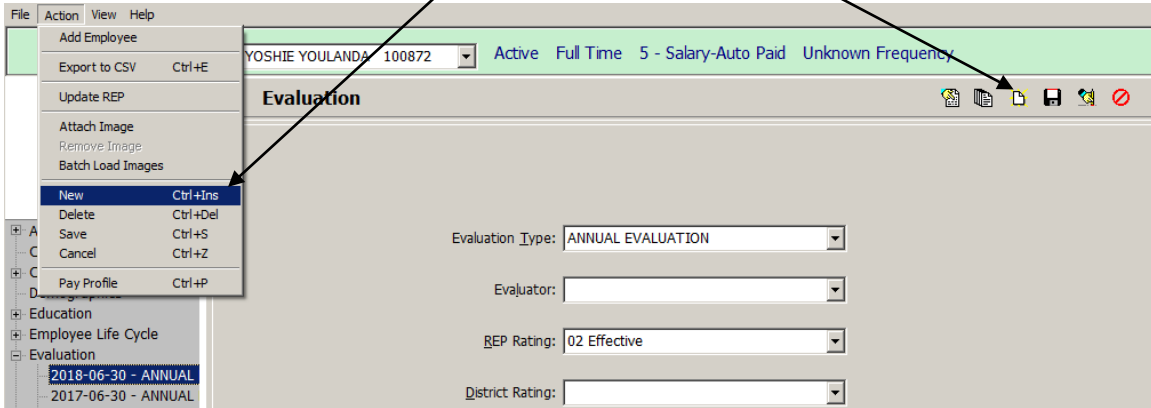
- 1 - Vacant, funded, open position, no one assigned
- 2 - Vacant, funded, open position, outside contractor assigned
- 3 - Funded, employee on loan or leave, no one assigned
- 4 - Funded, employee on loan or leave, filled by temp. employee
- 5 - Vacant, funded, open position, filled by temporary employee
- 6 - Funded, emp on loan or leave, outside cont, pos temp contrac
- 7 - Contracted services provider, non-instructional staff
- 9 - Filled position, regular

Evaluation Tab

The Evaluation Tab shows the Evaluation (Educator Effectiveness) information which is due on the June REP Submission (EOY). Evaluations can be loaded (pre-loaded) by RESA from an Excel spreadsheet.

Add Evaluation

To add an evaluation record, click on Actions – New or click on the paper with the sunshine.



A blank template will come up. Use the dropdowns to key in the Evaluation information. At a minimum, the fields below should be filled in.

Performance Evaluation

Evaluation Type: ANNUAL EVALUATION

Evaluator:

REP Rating: 02 Effective

District Rating:

Date Scheduled: 5/15/2015

Date Distributed: 3/30/2015

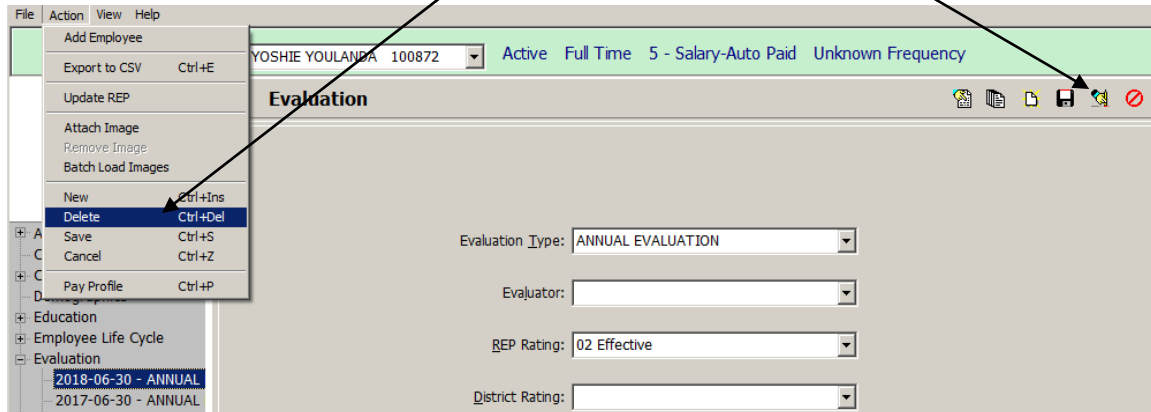
Date Expected:

Evaluation Date:

Distribution Location:

Delete Evaluation

To delete an evaluation record, click on the row of the emergency contact you want to delete and then click on Actions – Delete or click on the delete icon.




Update REP

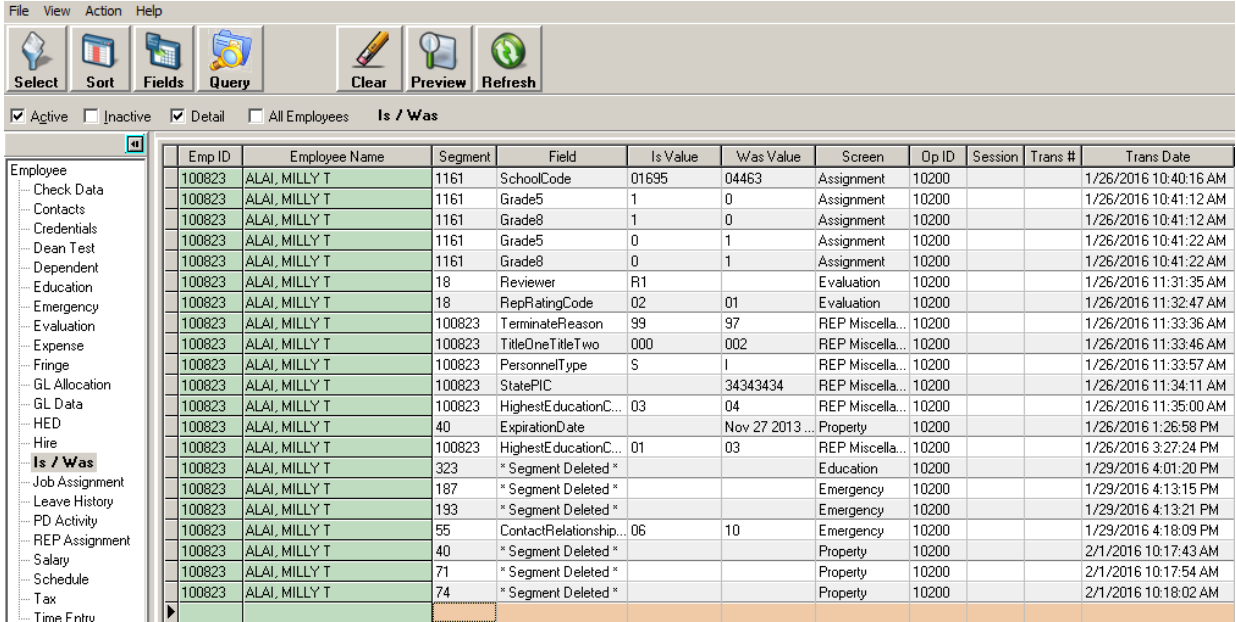
When you have made changes in Employee Information, the changes will automatically update overnight. If you need to see the changes in the Employee Analysis Module or the REP Module the same day (for example, when you are working on the REP submission), you can update the changes manually.

To update the changes manually, click on Action-Update REP. A message will be displayed when the update is complete. This can be done multiple times in the same day.

Audit Trail

All changes made in Employee Information are visible on the Is/Was tab in Employee Analysis.

The Audit Trail can also be accessed by clicking on the  icon.



Employee	Emp ID	Employee Name	Segment	Field	Is Value	Was Value	Screen	Op ID	Session	Trans #	Trans Date
100823	ALAI, MILLY T	1161	SchoolCode	01695	04463	Assignment	10200				1/26/2016 10:40:16 AM
100823	ALAI, MILLY T	1161	Grade5	1	0	Assignment	10200				1/26/2016 10:41:12 AM
100823	ALAI, MILLY T	1161	Grade8	1	0	Assignment	10200				1/26/2016 10:41:12 AM
100823	ALAI, MILLY T	1161	Grade5	0	1	Assignment	10200				1/26/2016 10:41:22 AM
100823	ALAI, MILLY T	1161	Grade8	0	1	Assignment	10200				1/26/2016 10:41:22 AM
100823	ALAI, MILLY T	18	Reviewer	R1		Evaluation	10200				1/26/2016 11:31:35 AM
100823	ALAI, MILLY T	18	RepRatingCode	02	01	Evaluation	10200				1/26/2016 11:32:47 AM
100823	ALAI, MILLY T	100823	TerminateReason	99	97	REP Miscella...	10200				1/26/2016 11:33:36 AM
100823	ALAI, MILLY T	100823	TitleOneTitleTwo	000	002	REP Miscella...	10200				1/26/2016 11:33:46 AM
100823	ALAI, MILLY T	100823	PersonnelType	S	I	REP Miscella...	10200				1/26/2016 11:33:57 AM
100823	ALAI, MILLY T	100823	StatePIC		34343434	REP Miscella...	10200				1/26/2016 11:34:11 AM
100823	ALAI, MILLY T	100823	HighestEducationC...	03	04	REP Miscella...	10200				1/26/2016 11:35:00 AM
100823	ALAI, MILLY T	40	ExpirationDate		Nov 27 2013...	Property	10200				1/26/2016 1:26:58 PM
100823	ALAI, MILLY T	100823	HighestEducationC...	01	03	REP Miscella...	10200				1/26/2016 3:27:24 PM
100823	ALAI, MILLY T	323	* Segment Deleted *			Education	10200				1/29/2016 4:01:20 PM
100823	ALAI, MILLY T	187	* Segment Deleted *			Emergency	10200				1/29/2016 4:13:15 PM
100823	ALAI, MILLY T	193	* Segment Deleted *			Emergency	10200				1/29/2016 4:13:21 PM
100823	ALAI, MILLY T	55	ContactRelationship...	06	10	Emergency	10200				1/29/2016 4:18:09 PM
100823	ALAI, MILLY T	40	* Segment Deleted *			Property	10200				2/1/2016 10:17:43 AM
100823	ALAI, MILLY T	71	* Segment Deleted *			Property	10200				2/1/2016 10:17:54 AM
100823	ALAI, MILLY T	74	* Segment Deleted *			Property	10200				2/1/2016 10:18:02 AM