# SMART eR GUIDE
# *For Employees*

**March 2022 – 21.3**

# Table of Contents

# 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



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. After initial login you will be forced to change your password.



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.

After "Save" is chosen you will receive the following message.

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

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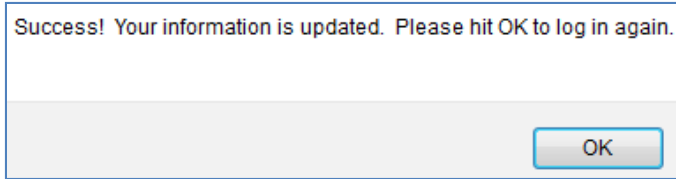
 Once "OK" has been selected you will return to the login window and required to log in using your new password.

Once logged in employees are required to choose either email or text message format for Dual Authentication verification.

Please click the button to receive your security code to verify your identity.

📋 I already have a code

✉ Email Code To *****78@gmail.com

✉ Email Code To *****da@regionv.k12.mn.us

🖉 Text Code To (***) ***-2035

← Close

Once they click on their choice, a verification box will display and an email or text will be sent similar to this:

*"Your SMART eR verification code is 267828. You must enter your code in SMART eR to allow eR access. Your code will expire in 30 minutes. If you did not make this change, please contact the Business Office."*

Verification Code [                    ]

✔ Verify      ← Close
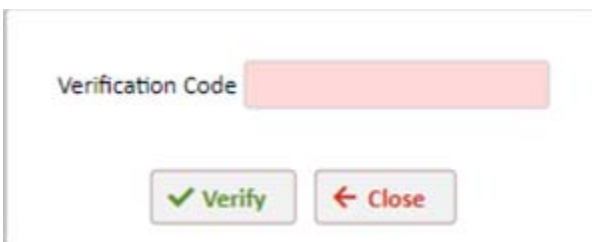
The code can be entered in SMART eR and then Verify can be clicked. If it is entered correctly, you will then be logged into SMART eR. If not, the process will start over. After three unsuccessful attempts, the account will be locked.

## *Changing Password*

**Password** can be maintained or changed using icons provided in the <u>upper right corner</u> of the **Home** page.

-   Select **Settings** to change password and security questions in SMART eR.

-   Select **Logout** to exit SMART eR.  Users should always log out of SMART eR to keep their data safe especially if they are using a public computer

-   Select **Help with this Page** when you are on a webpage to view SMART eR documentation.



## *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, check the box in the row(s) you want to delete, then click on "**Delete Selected**" button.
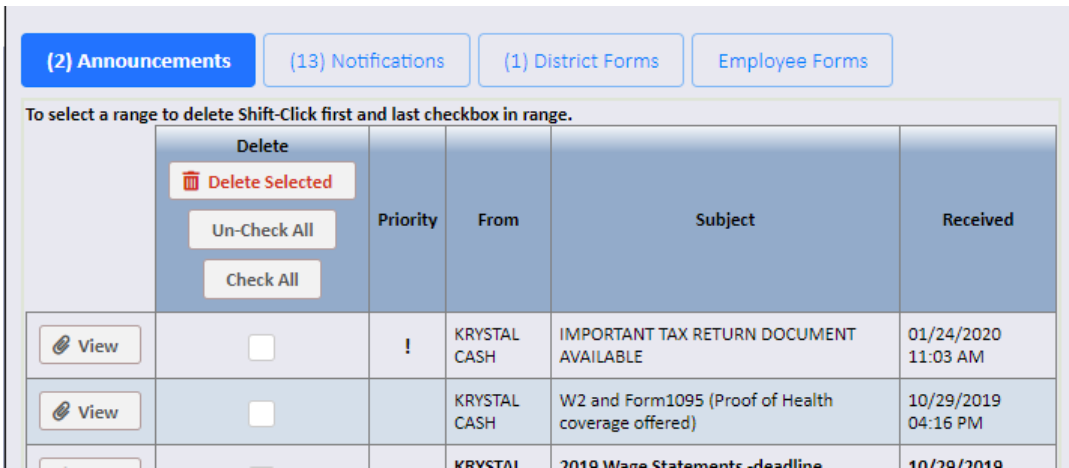
To access any forms that have been attached, click on the "**District Forms**" button. Click on the "**View**" tab to view and/or print the forms.
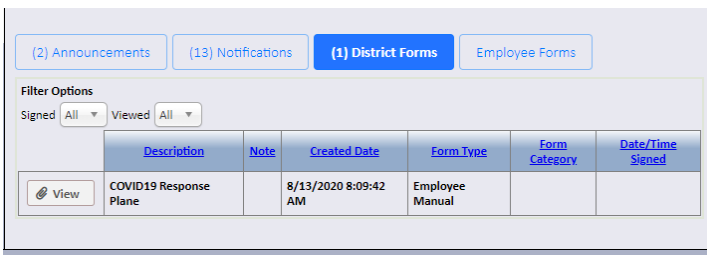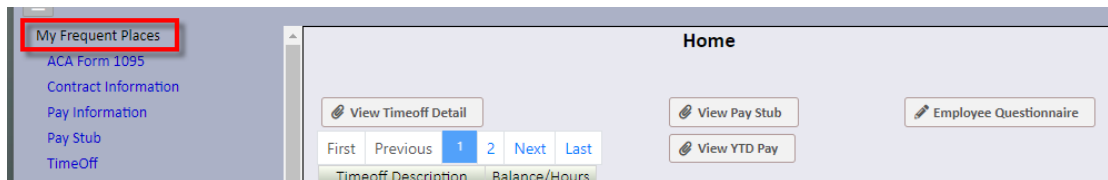


# SMART eR Menu Items Defined

## *Navigating SMART eR*

**Key Menu Items**:

**A. My Frequent Places (left sidebar).** This feature tracks the pages visited most frequently by the employee. It will list the top five most accessed places. *The same pages and reports are also available in the normal menu view. The user will not see anything here until they access a page.*



**B. Menus (left sidebar).** The Menus can be opened or closed by clicking on the plus or minus next to the menu name. SMART eR automatically opens the **Payroll Items** menu.

**C. Home.** The Home menu provides a snapshot of items that are relevant to all employees. There are display buttons that allow the user to quickly **View Pay Stub(s), TimeOff**, or **YTD Pay** (year-to-date information). The pages display the most current values available real-time. Detail can be viewed by clicking on the **View Detail** buttons.
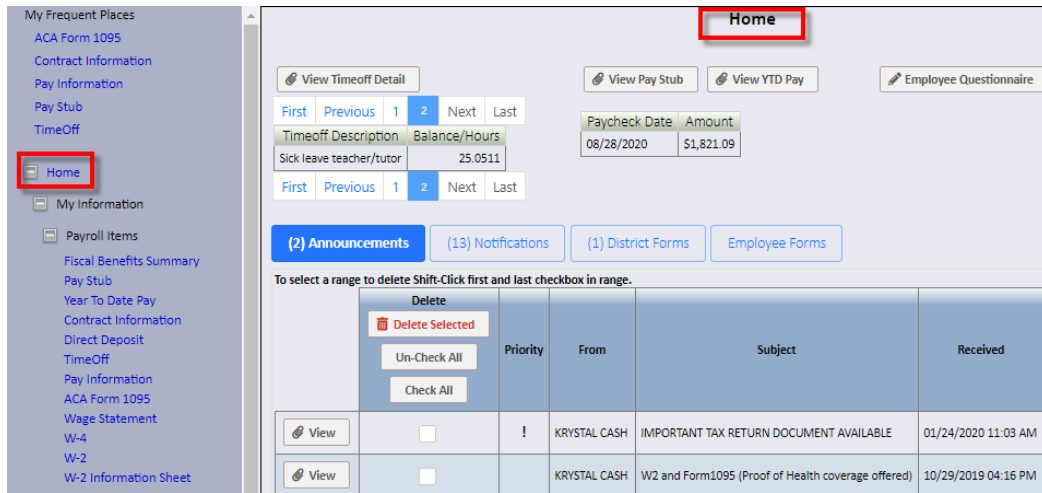
**D. Browsers (bottom of page).** To view browsers supported for the current release of SMART eR click on **Visit our About page** link.
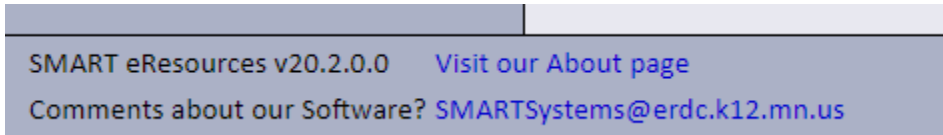


## Pay and Personal Information

**My Information | Payroll Items** provides payroll information about an employee detailing contract or notice of assignment information, benefits summary, pay stub detail, year-to-date pay information, TimeOff detail if the employer utilizes this feature, and pay information detailing information about an employee's pay for the fiscal year (e.g. lane, step, FTE, days and hours). The **Payroll Items** menu also provides an electronic option for the form W-2 and ACA Form 1095. If the employer allows, the employee can also update direct deposit information and Form W-4 used for tax withholding.

### TimeOff

**TimeOff** is displayed on the **Home** page if the district uses the TimeOff Module. The page displays the most current values available.



Detail can be viewed by clicking on the link to **View TimeOff Detail**.

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

**Home**

| | View Timeoff Detail | | | View Pay Stub | View YTD Pay | | Employee Questionnaire |
| Show Timeoff Summary | | | Show Pay Summary | | | | |

**Vacation Directors**

| | Date | Description | Begin Balance | Usage | Accrual | Available | New Year Lost | Accrual Lost |
|---|---|---|---|---|---|---|---|---|
| | 7/1/2020 | Beginning balance | 4.62 | | | 4.62 | 0.00 | |
| | 7/1/2020 | Vacation | | 1.00 | | 3.62 | | |
| | 7/1/2020 | Accrual | | | 24.00 | 27.62 | | 0.00 |
| | 7/6/2020 | Vacation | | 1.00 | | 26.62 | | |
| | Summary | | 4.62 | 2.00 | 24.00 | 26.62 | 0.00 | 0.00 |

**TimeOff** Information.

- **Please Select a Date Range.** Use the drop down box to select a different year to view
- Click  the plus [+] to view detail
- Click the minus [−] to hide detail
- To print click **Print Timeoff Detail** button

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.



**TimeOff**

🖶 Print Timeoff Detail

**Please Select A Date Range**

07/01/2020 to 06/30/2021

**Bereavement Leave-days**

| | Date | Description | Begin Balance | Usage | Accrual | Available | New Year Lost | Accrual Lost |
|---|---|---|---|---|---|---|---|---|
| | 7/1/2020 | Beginning balance | 0.00 | | | 0.00 | 0.00 | |
| | Summary | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

## Pay Stub

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

✓ This allows you to view pay detail from gross to net on your most recent paycheck.



**Home**

| View Timeoff Detail | | View Pay Stub | View YTD Pay | | Employee Questionnaire |

First | Previous | 1 | **2** | Next | Last

| Timeoff Description | Balance/Hours |
|---|---|
| Sick leave teacher/tutor | 25.0511 |

| Paycheck Date | Amount |
|---|---|
| 08/28/2020 | $1,821.09 |

The **Pay Stub** page provides links to Preview Entire Pay Stub, view Other Pay Stubs, Print Entire Pay Stub, View TimeOff Detail, use the Federal Withholding Calculator or the MN Withholding Calculator. The employee is required to consent to view this information.

**Pay Stub**

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

| 📎 Preview Entire Pay Stub | 🖨 Print Entire Pay Stub | 📊 Federal Withholding Calculator |
| 💲 Other Pay Stubs | 📎 View Timeoff Detail | 📊 MN Withholding Calculator |

**Pay Check**

| Date | Payment Type | Account Type | Financial Institution | Account | Net Pay |
|------|-------------|--------------|----------------------|---------|---------|
| 08/28/2020 | Direct Deposit | Savings | BankName-For-291975481 | *****s20 | $125.00 |
| 08/28/2020 | Direct Deposit | Savings | BankName-For-291975481 | *****889 | $250.00 |
| 08/28/2020 | Direct Deposit | Checking | BankName-For-091000022 | *****381 | $1,446.09 |
| | | | | Total | $1,821.09 |

**Summary**

| | Gross | Fed Tax | State Tax | Medicare | OASDI | Deductions | NET |
|--|-------|---------|-----------|----------|-------|-----------|-----|
| Current | $3,019.50 | $288.59 | $127.13 | $39.49 | $168.83 | $574.37 | $1,821.09 |
| Taxable Income | | $2,446.63 | $2,446.63 | $2,723.09 | $2,723.09 | | |
| Calendar YTD | $48,914.48 | $4,512.28 | $2,002.51 | $629.39 | $2,691.20 | | |

**Preview Entire Pay Stub.**  Click to view the entire pay stub.

- **Pay Stub Header.**  The header displays the employer name, address and employer phone number.  It shows the employee name, address, original hire date and adjusted hired date.  This information is supplied to allow the employee to print the pay stub for employment verification.
- **Payment Type.**  This provides the pay date for direct deposit of payroll or a printed check.  If the employee uses direct deposit banking information is displayed.
- **Method of Pay.**  Defines the type of pay earned by the employee.
- **Deductions (* = Pre Tax).**  This area displays employee deductions.  If the deduction is followed by an asterisk it is a pre-tax deduction meaning it is sheltered from federal tax, state tax and FICA for flex deductions.
- **Benefits.**  This area displays employer contributions that are part of the employment agreement with the district.
- **Taxes.**  Displays the tax withholding.
- **Pay summary.**  Displays the current taxable income and calendar year to date (YTD) for gross pay, federal tax, state tax, Medicare and OASDI, deductions and net pay.
- **Timeoff.**  Displays summary information for TimeOff.

**Pay Stub**

**Whizbang Public Schools**
202 Anywhere Road
Somewhere, MN 12345-6789

(218) 111-2222

HARRY 676 ROBBINS
PO Box 676
Somewhere, MN 12345

Original Hire Date: 01/05/2004      Adjusted Hire Date: 01/05/2004

| Date | Payment Type | Account Type | Financial Institution | Account | Amount |
|---|---|---|---|---|---|
| 08/28/2020 | Direct Deposit | Savings | BankName-For-29 | *****s20 | $125.00 |
| 08/28/2020 | Direct Deposit | Savings | BankName-For-29*‾‾‾181 | *****889 | $250.00 |
| 08/28/2020 | Direct Deposit | Checking | BankName-For-09*  22 | *****381 | $1,446.09 |
| | | | | Total: | $1,821.09 |

| Method - Pay | End Date | Units | Rate | Amount |
|---|---|---|---|---|
| S - Teacher Contract | 06/10/2020 | 0.0000 | $0.00 | $3,019.50 |
| | | | Total: | $3,019.50 |

| Deductions (* = Pre-Tax) | Amount |
|---|---|
| Health Ins * | $185.41 |
| Flex Medical * | $112.50 |
| TRA * | $226.46 |
| Met Life * | $50.00 |
| Total: | $574.37 |

**Legend - Method Of Pay**
H - Hourly  D - Daily  W - Weekly  S - Salary  R - Route  F - Shift  N - Not Applicable

| Benefits | Amount |
|---|---|
| Life Ins Over 50,000* | $1.50 |
| Life Board | $5.95 |
| LTD % Board | $6.49 |
| Workers Comp Board | $25.36 |
| Medicare - Employer | $39.49 |
| Dental Board | $45.59 |
| Met Life | $50.00 |
| VEBA-Select Acct | $108.41 |
| OASDI - Employer | $168.83 |
| TRA Board | $245.49 |
| Health Insurance | $727.16 |
| Total: | $1,424.27 |

| Taxes | Amount | Taxable Wages |
|---|---|---|
| Federal Income Tax | $288.59 | $2,446.63 |
| Medicare | $39.49 | $2,723.09 |
| MN Income Tax | $127.13 | $2,446.63 |
| OASDI | $168.83 | $2,723.09 |
| Total: | $624.04 | |

| Pay Summary | Gross | Fed Tax | State Tax | Medicare | OASDI | Deductions | NET |
|---|---|---|---|---|---|---|---|
| Current | $3,019.50 | $288.59 | $127.13 | $39.49 | $168.83 | $574.37 | $1,821.09 |
| Taxable Income | | $2,446.63 | $2,446.63 | $2,723.09 | $2,723.09 | | |
| Calendar YTD | $48,914.48 | $4,512.28 | $2,002.51 | $629.39 | $2,691.20 | | |

| Timeoff | Begin | Earned | Used | Available |
|---|---|---|---|---|
| Comp days- sub teaching | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Emergency-Business Leave | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Miscellanous leave | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Personal leave teacher | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Sick leave teacher/tutor | 25.0511 | 0.0000 | 0.0000 | 25.0511 |

**$ Other Pay Stubs.**  Allows the employee to select a year to view, and then select a specific date.

- This displays a list of pay stubs descending by date.  Click on the Date/Amount summary button to see the data of a previous pay stub.



**Pay Summary**

Select a year from the list to see that year's paychecks... 2020 ▾

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

Date/Amount

$ 08/28/2020 - $1,821.09

$ 08/14/2020 - $1,821.14

$ 07/30/2020 - $1,821.13

$ 07/15/2020 - $1,821.14

$ 06/30/2020 - $243.07

**Year to Date Pay.**  The Year to Date Pay displays year to date information for the current calendar year as of the date viewed.

- An employee can use the dropdown arrow to view prior year earnings. This page provides links to Preview Entire YTD Pay, Print Entire YTD Pay, provides a Federal withholding Calculator and a MN Withholding Calculator.

**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.

📎 Preview Entire YTD Pay    🖨 Print Entire YTD Pay    📊 Federal Withholding Calculator    📊 MN Withholding Calculator

HARRY ROBBINS
Year: 2020 ▼ Earnings through 08/28/2020

**Summary**

| | Gross | Fed Tax | State Tax | Medicare | OASDI |
|---|---|---|---|---|---|
| Calendar YTD | $48,914.48 | $4,512.28 | $2,002.51 | $629.39 | $2,691.20 |

**YTD Pay**

**Whizbang Public Schools**
**202 Anywhere Road**
**Somewhere, MN 123456789**

HARRY 676 ROBBINS
PO Box 676
Somewhere, MN 12345

Original Hire Date: 01/05/2004     Adjusted Hire Date: 01/05/2004

Calendar Year: 2020

| Pay | Amount |
|---|---|
| Teacher Contract | $48,312.00 |
| Unused personal/vacation | $263.20 |
| TRA | |
| XMENTOR | $339.28 |
| | **$48,914.48** |

| Deductions (* = Pre-Tax) | Amount |
|---|---|
| Health Ins* | $2,965.36 |
| Dues - Teacher | $547.63 |
| Flex Depend Care* | $766.72 |
| Flex Medical* | $1,800.00 |
| TRA* | $3,648.88 |
| Met Life* | $800.00 |
| Total: | **$10,528.59** |

| Benefits | Amount |
|---|---|
| Dental Board | $729.44 |
| Health Insurance | $11,634.56 |
| Life Board | $47.60 |
| Life Ins Over 50,000* | $24.00 |
| LTD % Board | $103.84 |
| Medicare - Employer | $629.39 |
| Met Life | $800.00 |
| OASDI - Employer | $2,691.20 |
| TRA Board | $3,878.59 |
| VEBA-Select Acct | $1,733.36 |
| Workers Comp Board | $410.83 |
| Total: | **$22,682.81** |

| Taxes | Amount | Taxable Wages |
|---|---|---|
| Federal Income Tax | $4,512.28 | $38,957.52 |
| Medicare | $629.39 | $43,406.40 |
| MN Income Tax | $2,002.51 | $38,957.52 |
| OASDI | $2,691.20 | $43,406.40 |
| Total: | **$9,835.38** | |

## Payroll Items

Additional **Payroll Items** found under the **Home** menu | **My Information** are listed below.

1. **Payroll Items**
   a) Fiscal Benefits Summary
   b) Contract Information
   c) Direct Deposit
   d) Pay Information
   e) ACA Form 1095
   f) Wage Statement
   g) W-4
   h) W-2

## Contract Information

The **Contract Information** page can be viewed if the district enables this feature. Employees can view and sign contracts or notices of assignment for the contract year selected.



## Direct Deposit

The **Direct Deposit** page allows an employee to view their current direct deposit for distribution of pay. If allowed by the employer, the employee can change the direct deposit amounts allocated to their bank account(s) online. <u>An electronic signature is required to verify employee identity.</u> Districts determine how many accounts each employee can enter. The change will not be active until it is signed by the employee and then moved into payroll, which could take a few payroll cycles depending on the date the change is processed in payroll.

**Change Direct Deposit.** If allowed by the employer click on the Change Direct Deposit tab to update your direct deposit account(s). If you currently have more than one direct deposit account active, you must re-enter the information for each account.

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



**Sign.**
To save changes and sign, read the Electronic Signature consent message, click in the checkbox

, then

click on the  button. You will be asked to verify your identity. Enter your current password and last four digits of your SSN, then click on the  button.



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*

The **Pay Information** page detail information about an employee's pay for the fiscal year. The page displays pay description, lane, step, FTE, pay amount, hours per day and days per year if district activates this option for employees. Employees can view information from prior years using the drop down box to select a different year.

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 09/01/2020 | | TEACHER | MA | 17 | * | 1.0000 | $0.00 | $76,520.00 | 6 | 193 | 1,158 | $66.08 | $396.48 | $0.00 |

### ACA Form 1095

The **ACA Form 1095** page allows employees <u>who consent</u>, the ability to view and print their ACA Form1095, if a form is used to them. A **consent message** will display the first time a user clicks on the page. If the employee consents, the IRS allows the employer to furnish the form to the employee electronically. Generally, this means the employee will receive their form sooner than paper form, and be more convenient for them as well. *If at any point an employee wishes to withdraw their electronic consent, they may do so in a written request to their employer.*

After consenting, employees will need to <u>verify who they are</u> when they access a page where their SSN is displayed for security reasons.



Employees can view prior years by using the drop down box to select a different year.



*Caution: If you are using a public computer the form is allowed to be viewed but will not automatically save as a .PDF document. The user can select to print or save as a .PDF file; however, the .PDF option is not recommended on a public computer for a tax form. If the document is saved as .PDF file, copy the file to a flash drive OR delete the .PDF form before signing off the public computer!*

## Wage Statement

The **Wage Statement** page is used to make sure employees receive their proper wages from their employer in response to the MN Wage Theft Law that went into effect on July 1, 2019. Employees can print and electronically sign their individual Wage Statement online. Employees can view information from prior years using the drop down box to select a different year.



## 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

Prior to viewing **W-4** tax withholding information employees will need to <u>verify who they are</u> when they access a page where their SSN is displayed for security reasons.





**Change W-4 Withholding.** If allowed by the employer, click on the Change Withholding tab to update your federal and state withholding allowance(s) online.

An Electronic Signature is required. The employee is asked to authorize the change and verify their identity. Changes will not be active until it is signed by the employee and then moved into a payroll date waiting to calculate.



**Sign.**
To save changes and sign, read the Electronic Signature consent message, click in the checkbox



, then click on the [✓ Sign] button. You will be asked to verify your identity. Enter your current password and last four digits of your SSN, then click on the [✓ Verify] button.



The employee can access both the **Federal and State Withholding Calculator** for online assistance in determining changes.



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**

The **W-2** page allows employees <u>who consent</u>, the ability to view and print their ACA Form1095, if a form is used to them. A **consent message** will display the first time a user clicks on the page. If the employee consents, the IRS allows the employer to furnish the form to the employee electronically. Generally, this means the employee will receive their form sooner than paper form, and be more convenient for them as well.

After consenting, employees will need to <u>verify who they are</u> when they access a page where their SSN is displayed for security reasons.



The form selected will now be available for preview when clicking on the "**Go**" button. Employees can view prior years by using the drop down box to select a different year.



From the **Generate W2 Form** page, click on the **Preview W2** or **Print W2** button.



## 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.

## About Me

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

2. **About Me**
   a) Dependents
   b) Education
   c) Emergency Contacts
   d) Employee Information
   e) Licensure
   f) Medical Information
   g) Training, Tests & Skills



## *Dependents*

The **Dependents** page allows employees to view and update dependent information if the employer allows access. To add a dependent click on **Add New** button.

## Education

The **Education** page allows employees to view the information the district has on file for their education along with continuing education credits *(e.g. **Lane Changes**)*.

| | | Course | Description | School | Credits | Grade | Date Enrolled | Date Completed | Approved By | Rec Trans | Current Lane | Date Lane Changed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Edit | Delete | SPA 102 | Elementary Spanish | UW LaCrosse | 6.000 | | | 07/17/2009 | GIBSON, APRIL 4210 | Y | MA+20 | |
| Edit | Delete | EDRD 600D | Foundations of Reading | St Mary's University | 4.500 | | | 04/28/2012 | GIBSON, APRIL 4210 | Y | MA+20 | |
| Edit | Delete | EDRD 601 | Elem Reading Inst K-6 | St Mary's University | 3.000 | | | 06/16/2012 | GIBSON, APRIL 4210 | Y | MA+20 | |
| | | | | MA+20 Credits: | 13.500 | | | | | | | |
| | | | | Total Lane Credits: | 13.500 | | | | | | | |

**Education** tab / **Continuing Education** tab / **+ Add New**

## Emergency Contacts

The **Emergency Contacts** page allows employees to view and update information if the employer allows access. An employee can add a new contact, edit information for an existing contact or delete a contact if no longer valid.

**Emergency Contacts**

**+ Add New**

| | | Contact Name | Relationship | Call Priority | Address | Home Phone | Office Telephone | Ext. | Mobile Phone |
|---|---|---|---|---|---|---|---|---|---|
| Edit | Delete | Sally Robbins | Spouse | 1 | PO Box 676 Somewhere, MN 12345- US | | ( ) - | | (123) 456-7890 |

## Employee Information | Address

The **Employee Information** page displays information from SMART HR. An employee can view and update employee information if the employer allows access. Editable tabs include **Address, Contact** information and **Other** personal data.

**Address** changes may not become effective immediately depending on payroll processing. *When making an address change also update your address for other benefits or notify the district office for assistance.*

**Employee Information**

**Address** / Contact / Other

**Current Name/Address**

| First Name | Middle Name | Last Name | Address |
|---|---|---|---|
| HARRY | 676 | ROBBINS | PO Box 676 Somewhere, MN 12345 US |

**Name/Address Changes**

Address changes may not become effective immediately depending on payroll processing. Please remember update your address on your other benefits also.

**Date To Be Changed**

**Address**

**City**

**Country** — United States

**State/Prov** — NA

**Postal Code**

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

**✓ Save**  **← Cancel**

## Employee Information | Contact



## Employee Information | Other



## Medical Information

The **Medical Information** page allows employees to view and update medical information if the employer allows access.



## Licensure | Teaching Licenses

The **Licensure** page allows employees to view their teaching license, other licenses and certification information, 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*

Additional **Training, Tests & Skills** can be viewed in this window.   It is used to track other types of training for staff and the date the training was completed.
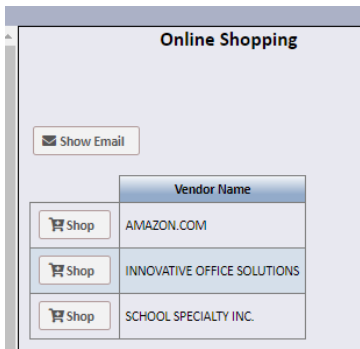


## Requests

**Requests** includes **Online Shopping, Order Requisition Entry, Reimbursement Entry, 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.



## Online Shopping

The first method for web-based ordering is **Online Shopping** 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 authorized district personnel to create an order request in SMART eR to be transferred into SMART Finance for requisition or 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 SMART Finance where it becomes a requisition or purchase order.



## Reimbursement Entry

**Reimbursement Entry** is a web-based system for users to enter employee reimbursements and route for approval to be paid through payroll. This process is designed to save time. If allowed by the employer, the staff member will enter the request for reimbursement instead of Payroll personnel.

## Responsibilities

The **Responsibilities** group includes **Approvals, Place Order, Property Assignment, 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.



## Place Order

**Place Order** is used to electronically submit approved purchase orders created through the Online Order "punch-out" feature in SMART eR. Only approved orders will appear for selection. To see the details of the order, click the + symbol.



## 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 SRA form online. 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.