



SMART HR

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SMART Systems Development

Recording of this presentation on a device with AI is NOT allowed!
Copies of slides will be available from the Region after the presentation.

Today's Agenda

- Mandatory Reminders
 - Q1: Jan-Mar
 - Q2: April-June
 - Q3: July -Sept
 - Q4: Oct-Dec
- Coming Soon
- Questions

Mandatory Reminders

Q1: Jan-March

Withholding States supported by SMART

Arizona (AZ)
Colorado (CO)
Connecticut (CT)
Georgia (GA)
Hawaii (HI)
Illinois (IL)
Iowa (IA)
Kansas (KS)
Michigan (MI)
Minnesota (MN)

Missouri (MO)
New York (NY)
Nebraska (NE)
North Carolina (NC)
North Dakota (ND)
Oklahoma (OK)
Pennsylvania (PA)
South Carolina (SC)
Vermont (VT)
Wisconsin (WI)

No tax states:

Alaska (AK)
Florida (FL)
Nevada (NV)
New Hampshire (NH)
South Dakota (SD)

Tennessee (TN)
Texas (TX)
Washington (WA)
Wyoming (WY)

Payroll | Tax Setup

Tax Setup														
As Of: 03/24/2025														
ID	Name	Start	Stop	Mar	Allow	ST	Step 2	Step 3	Step 4a	Step 4b	4c - Addnl	Exempt		
												Medi	OASDI	FUTA
1399	BEACH, SANTIAGO 1399													
FIT		01/22/2019		M	0	WI					0.00	N	N	Y
SITWI		01/22/2019		M	0						0.00			
2129	BLAKE, SYLVIA 2129													
FIT		10/01/2021		M		WI	N	0.00	0.00	0.00	0.00	N	N	Y
SITWI		10/01/2021		M	0						0.00			
1517	BLEVINS, VAN 1517													
FIT		09/01/2019		S	1	IA					0.00	N	N	Y
SITIA		09/01/2019		M	1						0.00			
1457	BOWEN, DOUGLAS 1457													
FIT		01/22/2019		M	0	WI					0.00	N	N	Y
SITWI		01/22/2019		M	0						0.00			
1994	BOYER, VICTORIA 1994													
FIT		01/23/2019		M	0	WI					0.00	N	N	Y
SITWI		01/23/2019		M	0						0.00			
2172	CARNEY, GRANT 2172													
FIT		03/01/2023		S		KS	N	0.00	0.00	0.00	0.00	N	N	Y
SITKS		03/01/2023		S	0						0.00			
1514	COFFEY, ROSIE 1514													
FIT		01/01/2024		M		GA	N	0.00	0.00	0.00	0.00	N	N	Y
SITGA		01/01/2024		M		Depend Credit: 0					20.00			
2171	CONWAY, TONYA 2171													
FIT		09/01/2022		M		NY	N	0.00	0.00	0.00	0.00	N	N	Y
SITNY		09/01/2022		M	0						0.00			
1675	COOKE, LATOYA 1675													
FIT		01/01/2024		S		CO	N	0.00	0.00	0.00	0.00	N	N	Y
SITCO		01/01/2024		S	600						0.00			
506	CORTEZ, TABITHA 506													
FIT		12/01/2019		M	2	ND					250.00	N	N	Y
SITND		12/01/2019		M							0.00			

MN Paid Leave Premiums

MNPL%CY -> Percentage of the premium the employee is responsible for.

MNPL%CYR -> Percentage of the premium the employer is responsible for, up to the required minimum set by the state.

MNPLTX%CYR -> Percentage of the premium paid by the employer that is over the required minimum set by the state. This code will expense the district benefit AND inflate the employee's taxable wage. *Contact your region to activate this code.*

MNPLWAGE -> This is a memo code that will calculate the wage used to calculate each premium percentage. MNPLWAGE is equal to gross wage minus EBENONW2. This code does NOT need to be activated or assigned to employees. It will automatically calculate for any employee with MNPL%CY, MNPL%CYR, or MNPLTX%CYR.



A new calc warning will display if someone is going to be paid, but doesn't have a paid leave deduct code setup!

MNPL-Self-Insured Payment Option

This would be the option if you choose to self insure instead of going through the state or private carrier for MN PL Payments to employees.

Is anyone here currently or planning to do this?

MNPL-Self-Insured Payment Option

We have built pay codes if needed...

Supplemental Pay Codes:

MNPFLNORET - Family Leave, taxable, not eligible for PERA/TRA.

MNPFLNOTAX - Family Leave, not taxable, eligible for PERA/TRA.

MNPFLNTXNR - Family Leave, not taxable, not eligible for PERA/TRA.

MNPMLNORET - Medical Leave, taxable, not eligible for PERA/TRA.

MNPMLNOTAX - Medical Leave, not taxable, eligible for PERA/TRA.

MNPMLNTXNR - Medical Leave, not taxable, not eligible for PERA/TRA.

Check with the appropriate agency(s) to see which codes your setup will need to use!

MNPL-Topping off Pay/Supplement PL

Some schools are considering topping off pay...we have built pay codes if needed...

Supplemental Pay Codes:

MNSUPP - Contract pay code eligible for PERA/TRa.

MNSUPP_HR - Hourly pay code eligible for PERA/TRa.

MNNORET - Contract pay code not eligible for PERA/TRa.

MNNORET_HR - Hourly pay code not eligible for PERA/TRa.

Check with the appropriate agency(s) to see which codes your setup will need to use!

MNPL-Topping off Pay/Supplement MNPL

If you are considering topping off pay with TimeOff hours...

And using TimeTracker... we strongly encourage you **NOT** to have employees enter this in SMART eR!

A payroll person should enter it directly into TimeOff instead—this is likely a wage conversion which will be hard for employees to understand translating from hours and minutes.

Also, an employee may not know the exact amount the state is paying to even start or what the district requirements are.

MNPL-Rolling personal TimeOff Plans

Concept: Allows TimeOff Plans to be built that are based on a rolling 12-month period instead of the usual TimeOff Year of July through June.

Allows you to track paid leave, but not interfere with normal TimeOff.

We strongly encourage you NOT to build these on employees until they actually have an approved leave through the state! *It will be way less maintenance for you as some employees may never use it.*

MNPL-Rolling personal TimeOff Plans

1. Setup: Turn on the plan(s) desired.

Default TimeOff Plans:

- **MNPFLROLL_DAY** → MN Paid Family Leave Roll Plan for Days
- **MNPFLROLL_HR** → MN Paid Family Leave Roll Plan for Hours
- **MNPMLROLL_DAY** → MN Paid Medical Leave Roll Plan for Days
- **MNPMLROLL_HR** → MN Paid Medical Leave Roll Plan for Hours

MNPL-Rolling personal TimeOff Plans

2. Maintain Employee TimeOff Plans:

- Assign the appropriate TimeOff Plan to employees after leave has been approved. *The start date should be the first date of leave approved by the state.*
- An accrual limit and max during year can be entered.
- Setting up a plan here will automatically build the NewYear row for you.

MNPL-Rolling personal TimeOff Plans

3. TimeOff Activity-One Employee:

- Add a manual accrual row to define how many hours or days an employee gets.

TimeOff Activity - One Employee

Select Employee ID Calculate/Save

TimeOff Year 2026 07/01/2025 TO 06/30/2026

TimeOff Plan MNPLROLL_HR

Detail Usage by Plan and Reason Summary by Plan **Rolling Summary by Plan**

TimeOff Plan	Day Of Week	Date	TimeOff Reason	Reason Description	Units Total	Units	Units Lost	Available	Notes
MNPLROLL_HR	Mon	01/12/2026	NEWYEAR*	Beginning balance	0.0000	0.0000	0.0000	0.0000	
MNPLROLL_HR	Mon	01/12/2026	ACCRUAL	Manual accrual	480.0000	480.0000	0.0000	480.0000	

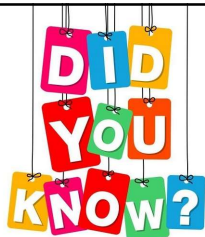
- **New tab: Rolling Summary by Plan**
- You can mix Roll plans if needed.

MNPL-Rolling personal TimeOff Plans

4. If using TimeTracker -

- Setup the same way that TimeOff Plans are built today.
- Tracks a rolling balance in SMART eR based on the employee's start date.
- Employees can request TimeOff to this plan, but only if allowed.
- May be helpful in tracking intermittent Paid Leave usage.

Again – we strongly encourage you NOT to build these TimeTracker TimeOff rows on employees until they actually have an approved leave through the state!



For plan years starting in 2026 the ACA affordability percentage is 9.96%.

Jan renew plan affordability amount =

\$129.89 ($15650 \times 9.96\% / 12$)

Feb-Dec renew plan affordability amount =

\$117.63 before the renew month ($15650 \times 9.02\% / 12$)

\$132.46 after the renew month ($15960 \times 9.96\% / 12$)

OSHA Filing 300A Tally/MN UI Reports

District #0

ISD #

MN Quarterly UI Detail

Page 7 of 8
3/24/2025
12:43 PM

Qtr End	Year	Qtr	UI Account	UI Loc	ID	Name	Pay Code	Amount	Actual Units	Conversion	Default Hours	Override Hours	Pay Code Hours	Reported For UI
03/31/2025	2025	1	0	3	0300	1245	RICHARD, KARLA 1245	BUS1_UNIT	4,206.91	171.50	0	0	172	UI
03/31/2025	2025	1	0	3	0300	1245	RICHARD, KARLA 1245	HOURLY	1,505.31	83.18	0	0	83	UI
03/31/2025	2025	1	0	3	0300	1245	RICHARD, KARLA 1245	XNORET_HR	559.04	22.79	0	0	23	UI
03/31/2025	2025	1	0	3	0300	1344	ROBINSON, SHELDON 1344	XGMHLP_HR	180.00	6.00	0	0	6	UI
03/31/2025	2025	1	0	3	0300	1344	ROBINSON, SHELDON 1344	XGMHLP1_HR	120.00	4.00	0	0	23	UI
03/31/2025	2025	1	0	3	0300	1338	ROSA, EVA 1338	PARA_HR	4,340.63	231.50	0	0	232	UI
03/31/2025	2025	1	0	3	0300	1338	ROSA, EVA 1338	SUBTCH	150.00	1.00	7.00	0	7	UI
03/31/2025	2025	1	0	3	0300	1338	ROSA, EVA 1338	SUBTCH_HR	130.00	6.50	0	0	7	UI
03/31/2025	2025	1	0	3	0300	1199	ROY, ELLA 1199	COMMED_HR	1,094.60	52.00	0	0	52	UI
03/31/2025	2025	1	0	3	0300	1199	ROY, ELLA 1199	PARA_HR	5,263.36	381.00	0	0	381	UI
03/31/2025	2025	1	0	3	0300	836	SANTOS, KATIE 836	TEACHER	8,717.36	0.00	465.000	0	465	UI
03/31/2025	2025	1	0	3	0300	1247	SIMON, ERIN 1247	BUS_OT	225.58	6.13	0	0	6	UI
03/31/2025	2025	1	0	3	0300	1247	SIMON, ERIN 1247	BUS1_UNIT	8,830.80	360.00	0	0	360	UI
03/31/2025	2025	1	0	3	0300	1247	SIMON, ERIN 1247	SHFTDF_HR	99.90	222.00	0	0	222	UI
03/31/2025	2025	1	0	3	0300	1312	SIMS, GLORIA 1312	PARA_HR	5,063.52	264.00	0	0	264	UI
03/31/2025	2025	1	0	3	0300	1208	SINGLETON, LUZ 1208	CUSTODIAN	4,750.20	0.00	520.000	0	520	UI
03/31/2025	2025	1	0	3	0300	1271	SOSA, TIM 1271	TEACHER	8,955.68	0.00	465.000	0	465	UI
03/31/2025	2025	1	0	3	0300	1271	SOSA, TIM 1271	XGMHLP_HR	90.00	3.00	0	0	3	UI
03/31/2025	2025	1	0	3	0300	1348	TALLEY, FLORENCE 1348	CUBUSUB_HR	1,042.50	69.50	0	0	70	UI
03/31/2025	2025	1	0	3	0300	607	TERRY, JULIUS 607	LONGEVITY	125.00	0.00	1.000	0	1	UI
03/31/2025	2025	1	0	3	0300	607	TERRY, JULIUS 607	TEACHER	13,462.16	0.00	465.000	0	465	UI
03/31/2025	2025	1	0	3	0300	607	TERRY, JULIUS 607	XTEACH_HR	30.00	1.00	0	0	1	UI
03/31/2025	2025	1	0	3	0300	231	TYLER, KARI 231	BLDGRND_HR	8,309.89	360.00	0	0	360	UI
03/31/2025	2025	1	0	3	0300	231	TYLER, KARI 231	MISC5_HR	725.76	18.00	0	0	18	UI
03/31/2025	2025	1	0	3	0300	876	VIEFZ, NATHAN 876	BLDGRND_HR	5,987.46	265.00	0	0	265	UI

New W4 forms for 2026 - 25.3.1

Reminder: *Even if you do not allow your employees to change their W4 -new form for each will display that can be printed or updated and messaged to the Payroll person or Office in eR.*

2026 W-4MN, Minnesota: Employees

Complete Form W-4MN so your employer can withhold the correct federal income tax from your pay.

First Name and Initial

Permanent Address

City

Complete Section 1 OR Section 2, then

☐ Section 1 — Determining Minnesota A

A Enter "1" if no one else can claim you as a

B Enter "1" if any of the following apply: ...

- You are single and have only one job
- You are married, have only one job, and your wages from a second job or your:

C Enter "1" if you are married, or enter "0" spouse or more than one job. (Entering "0" Enter the number of dependents you will claim on your tax return.)

Form W-4

Department of the Treasury Internal Revenue Service

Employee's Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.

OMB No. 1545-0074

2026

Step 1: Enter Personal Information

(a) First name and middle initial Last name

Address

City or town, state, and ZIP code

(b) Social security number

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(c) ☐ Single or Married filing separately ☐ Married filing jointly or Qualifying surviving spouse ☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Caution: To claim certain credits or deductions on your tax return, you (and/or your spouse if married filing jointly) are required to have a social security number valid for employment. See page 2 for more information.

TIP: Consider using the estimator at www.irs.gov/W4App to determine the most accurate withholding for the rest of the year if you: are completing this form after the beginning of the year; expect to work only part of the year; or have changes during the year in your marital status, number of jobs for you (and/or your spouse if married filing jointly), dependents, other income (not from jobs), deductions, or credits. Have your most recent pay stub(s) from this year available when using the estimator. At the beginning of next year, use the estimator again to recheck your withholding.

SMART eR Messaging

Home

neOff

neOff

Communications

Announcements

Notifications

District Forms

Employee Forms

SMART Messaging

SMART Messaging

Message Sent

Fields with a colored background need to be entered before saving.
Click on an employee or Shift+click for multiples.

Clear Send

Name

Payroll

HR Director

Person, Specific

Subject

Importance

None

Message

District allowed attachment types: PDF, JPEG, JPG, DOCX, XLSX
Only 5 attachments are allowed per message. If more are needed, an additional message will need to be sent.

Add Attachment(s)

Attachment Choose a file or drag it here

Attachment Choose a file or drag it here

Attachment Choose a file or drag it here

Attachment Choose a file or drag it here

Attachment Choose a file or drag it here

New 941 form with changes- 25.3.1

- IRS release date March 2026
- No new 941B at this time

City, State, Zip

Aggregate Return Filers Only

Part 1: Line 13a: **120,265.00** Total deposits including prior quart

Line 15: Overpayment Alternative

Send a refund If 'Send a Refund' is selecte

001000000 Routing Num

1234 Ac

Part 2: Line 16: **Semiweekly Depositor** Depositor Schedule

Part 3: If necessary, complete this part after the Form 941 has been genera

Read the separate instructions before you complete Form 941. Type or print within the boxes.

Part 1: Answer these questions for this quarter. Employers in American Samoa, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, and Puerto Rico must skip lines 2 and 3, unless you have employees who are subject to U.S. income tax withholding.

1 Number of employees who received wages, tips, or other compensation for the pay period including: Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), or Dec. 12 (Quarter 4) 1 0

2 Wages, tips, and other compensation 2 365245 79

3 Federal income tax withheld from wages, tips, and other compensation 3 19130 25

4 If no wages, tips, and other compensation are subject to social security or Medicare tax ☐ Check here and go to line 6.

Column 1 Column 2

5a Taxable social security wages 396223 44 × 0.124 = 49131 71

5b Taxable social security tips × 0.124 =

5c Taxable Medicare wages & tips 396223 44 × 0.029 = 11490 48

5d Taxable wages & tips subject to Additional Medicare Tax withholding × 0.009 =

5e Total social security and Medicare taxes. Add Column 2 from lines 5a, 5b, 5c, and 5d 5e 60622 19

5f Section 3121(g) Notice and Demand—Tax due on unreported tips (see instructions) 5f

6 Total taxes before adjustments. Add lines 5, 5e, and 5f 6 79752 44

7 Current quarter's adjustment for fractions of cents 7 0 01

8 Current quarter's adjustment for sick pay 8

9 Current quarter's adjustments for tips and group-term life insurance 9

10 Total taxes after adjustments. Combine lines 6 through 9 10 79752 45

11 Qualified small business payroll tax credit for increasing research activities. Attach Form 8874 11

12 Total taxes after adjustments and nonrefundable credits. Subtract line 11 from line 10 12 79752 45

13 Total deposits for this quarter, including overpayment applied from a prior quarter and overpayments applied from Form 941-X, 941-X (PR), or 944-X filed in the current quarter 13 120265 00

14 Balance due. If line 12 is more than line 13, enter the difference and see instructions 14 40512 55

15a Overpayment. If line 13 is more than line 12, enter the difference 40512 55 15b Check one: ☐ Apply to next return. ☒ Send a refund.

15c Routing number 001010000000000000 15d Type: ☒ Checking ☐ Savings

15e Account number 1234

You MUST complete both pages of Form 941 and SIGN it.

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. www.irs.gov/Form941 Cat. No. 170012 Form 941 (Rev. 3-2026) Created 4/1/25

Form 941 and W2 Proof

W-2 Errors/Warnings					2/9/2026 7:29 AM
Name	Id	Status	Union	Error/Warning Message	
Kinney, Regina 12409	12409	AC	10	FYI: Taxable Fringe Benefits FRINGETAX = 260.00	
Leonard, Lucas 15454	15454	AC	04	FYI: Taxable Fringe Benefits FRINGETAX = 60.00	
Levy, Myrtle 16324	16324	TR	10	Actual Taxable Wage <MEDICARE> Is Not Equal To Calc Taxable Wage <MEDICARE> Actual Wage = 14,815.88 Calculated Wage = 14,816.18	
Levy, Myrtle 16324	16324	TR	10	Actual Taxable Wage <MEDICARE> Usually Equals Actual Taxable Wage <MEDICARER> Medicare = 14,815.88 MedicareR = 14,816.18	
Levy, Myrtle 16324	16324	TR	10	Actual Taxable Wage <OASDI> Is Not Equal To Calc Taxable Wage <OASDI> Actual Wage = 14,815.88 Calculated Wage = 14,816.18	
Levy, Myrtle 16324	16324	TR	10	Actual Taxable Wage <OASDI> Usually Equals Actual Taxable Wage <OASDIR> OASDI = 14,815.88 OASDIR = 14,816.18	
Lindsay, Natasha 13083	13083	LV	04	FYI: Taxable Fringe Benefits FRINGETAX = 335.00	
Lindsay, Peggy 14685	14685	TR	04	Actual Tax <MEDICARE> Is Different Than Actual Tax <MEDICARER> Medicare = 766.57 MedicareR = 766.58	
Lindsay, Peggy 14685	14685	TR	04	Actual Taxable Wage <MEDICARE> Is Not Equal To Calc Taxable Wage <MEDICARE> Actual Wage = 52,867.20 Calculated Wage = 52,868.20	
Lindsay, Peggy 14685	14685	TR	04	Actual Taxable Wage <MEDICARE> Usually Equals Actual Taxable Wage <MEDICARER> Medicare = 52,867.20 MedicareR = 52,868.20	
Lindsay, Peggy 14685	14685	TR	04	Actual Taxable Wage <OASDI> Is Not Equal To Calc Taxable Wage <OASDI> Actual Wage = 52,867.20 Calculated Wage = 52,868.20	
Lindsay, Peggy 14685	14685	TR	04	Actual Taxable Wage <OASDI> Usually Equals Actual Taxable Wage <OASDIR> OASDI = 52,867.20 OASDIR = 52,868.20	

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Mandatory Reminders Q2-April-June

TRA Rate change

We are not aware of any changes at this point in time.

If you see a last-minute change like last year, please notify your regional center.

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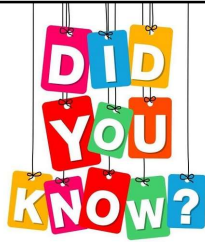
Mandatory Reminders
Q3-July-Sept

2026 MNPL Changes?

If changes were made during the legislative session that require additional programming or changes, we will keep you posted.

Ways to setup new codes

- New Pay/Deduct Code window
good for initial setup in mass, group options
- Paycheck Data - pay and deductions tab
good for proofing one employee or a missed employee
- Mass Emp Pay/Deduct Maint
good for rolling employees from year to year
- Setup New Hire/Rehire Templates
will auto-build rows for new hires and rehires by group



If you know the name of a window, but not where it is, you can search for it...



Setup Rate Tables- import option



Serious error if a new rate table name matches an existing pay or deduct code exactly.

Proofing first payroll- Payroll Proof Report

Verify that the correct percentages are being calculated for the new deduction and benefit code(s) for each employee.

Example 1: Employee and employer are responsible for the required minimums set by the state:

$\$2,291.67 \times 0.44\% = \$10.08$ paid by both the **employee** and **employer**

			Ck Seq No 0	Check Date 1/15/2026	Gross	2,291.67	Net	1,533.18	
Pay	BLDGROUND	2,291.67	XSTIPEND3	0.00					
Pay Memo	REGPAY	2,291.67							
Deductions	DENTAL	22.57	MNPL%CY	10.08	PERA_EE	148.96	STD	32.50	TSA 135.41
	VISIONFLX	2.93							
Ded Memo	FLEXTOTL	2.93	MNPLWAGE	2,291.67	PERAWAGE	2,291.67			
Benefits	LIFER	4.13	LTDR	8.41	MNPL%CYR	10.08	PERA_ER	171.88	TSAMATCH 135.41
Taxes	FIT	155.59	MEDICARE	33.19	MEDICARER	33.19	OASDI	141.90	OASDIR 141.90
	SITMN	75.36							
Taxable Wages	FIT	2,004.37	MEDICARE	2,288.74	MEDICARER	2,288.74	OASDI	2,288.74	OASDIR 2,288.74
	SITMN	2,004.37							

Proofing first payroll- Payroll Proof Report

Verify that the correct percentages are being calculated for the new deduction and benefit code(s) for each employee.

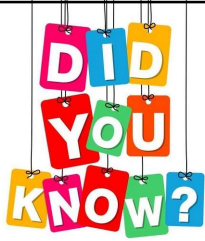
Example 2: Employer is paying greater than the required minimum set by the state:

$\$2,895.83 \times 0.22\% = \$6.37$ paid by the **employee**.

$\$2,895.83 \times 0.44\% = \$12.74$ paid by the **employer**.

$\$2,895.83 \times 0.22\% = \$6.37$ paid by the **employer** and added to the employee's taxable wage.

			Ck Seq No 0	Check Date 1/15/2026	Gross	2,895.83	Net	1,941.13	
Pay	HUMRESC	2,895.83							
Pay Memo	REGPAY	2,895.83							
Deductions	LIFE	19.37	MNPL%CY	6.37	PERA_EE	188.23	TSA	70.00	VISIONFLX 2.93
Ded Memo	FLEXTOTL	2.93	MNPLWAGE	2,895.83	PERAWAGE	2,895.83	WCWAGE	2,895.83	
Benefits	LIFER	4.13	LTDR	4.99	MNPL%CYR	12.74	MNPLTX%CYR	6.37	PERA_ER 217.19
	TSAMATCH	62.50	WCOMP%R	11.58					
Taxes	FIT	286.99	MEDICARE	42.04	MEDICARER	42.04	OASDI	179.75	OASDIR 179.75
	SITMN	159.02							
Taxable Wages	FIT	2,641.04	MEDICARE	2,899.27	MEDICARER	2,899.27	OASDI	2,899.27	OASDIR 2,899.27
	SITMN	2,641.04							



The Status-Date Range report has Original Hire date retrieval arguments?

To help you isolate your New hires...

Status - Date Range

Create Report

Retrieval Argument(s)	Value(s)	Wildcards
Primary Status		☐
Secondary Status		☐
Union		☐
Location		☐
Department		☐
Check Location		☐
Unemployment Location		☐
Retire Status		☐
Begin Adjusted Hire Date		
End Adjusted Hire Date		
Begin Original Hire Date		
End Original Hire Date		

HR | Background Check

Background Check

Create Report

Retrieval Argument(s)	Value(s)	Wildcards
Ending Date Filed	* 3/24/2025	
Beginning Date Filed		
ID		☐
Primary Status	AC, LV	☐
Secondary Status		☐
Location		☐
Missing Background Check	N	

Background Check						
	Name	Date Filed	Verified	Employee Signature	Date Signed	Fee Collected Description
292	ACEVEDO, DONALD 1292					
350	AVILA, ADRIAN 1350					
240	BAILEY, TERRENCE 1240					
248	BALLARD, HOLLY 1248					
286	BARTLETT, VERA 1286					
346	BENDER, CAROLINE 1346					
347	BENDER, TIMMY 1347					

Ending Date Filed - defaults to today, but can be changed

Missing Background Check -Y -> will create list of active employees that do not have a background check on file.

Payroll Setup | Setup New Hire/Rehire Templates

Setup New Hire/Rehire Templates

Select Employee Template

Pay Codes Pay Auth Deductions

Pay Code Start Date Stop Date

TEACHER 09/01/2022 08/31/2023

Double click Rate Table Box for Rate Information

Rate Table: TEACHER

Overrides: 8.000 000 183.000

Notes:

New Hire

Select Employee ID Transfer from Assignments

Employee Basic Information

Social Security Card Info

* First Name
 * Middle Name
 * Last Name
 * SSN
 * Birth Date Age:
 * Gender
 Language
 Privacy
 Employee Type
 PERA Number
 TRA Number
 SMART eR Access
 Federal Race and Ethnicity:
 * Ethnicity:
 * Race(s):

Status Info Address Info ACA Info Supp Info 3rd Party Info Benefit Elig

Primary Status
 * Secondary Status
 Retire Status
 * Orig Hire Date
 Adj Hire Date
 * Department
 Job
 * EEO Location
 * EEO Code
 Check Location
 * Unemployment Location
 TimeTracker Location
 Exempt ☐

Copy Payroll Copy HR Copy TimeTracker

ID to be copied Enter Start Dates: OR ☐ Build defaults from Employee Templates

Pay Codes Pay Authorization
 Deductions Retirement
 Distribution Timeoff
 Employee Template
 Start Date

Folders can be built in Employee Notes

Folders are automatically setup for all employees

MNPL might be a good one if needed

Employment Notes

FAYE 705 ABBOTT
 Orig Hire Date 5/1/2002 Adj Hire Date 5/1/2002

Print Note

Folders

- General
- Insurance Forms
- Salary & Benefit Notice
- Career Planning
- Continuing Ed
- Disciplinary Action**
- Commendations
- Employment Info

Date	Confidential	Description (Required)	Attachment	Attachment Type	View in SeR	Sign	Active
03/31/2025	☐	disciplinary notice					☒
Note Added By: MARTIN, JULIO 296							
View Date: Sign Date:							

Drag Attachment Here

Open Attachment Add Attachment Hide Inactive

Save Close

The purpose of employee notes is to offer a tool to end users to assist in storing employee information. Each end user should have an understanding of how record regulations impact their unique circumstances. Questions or concerns regarding compliance with existing record retention or what is viewable to district personnel should be directed to someone with proper expertise in this area of regulation.

SMART eR Changes

SMART eR Changes

Selection of IDs

SMART eR Changed Rows

Selection of IDs

☐ ID
☐ Last Name
☐ First Name
☐ Middle Name
☐ Address 1
☐ Address 2
☐ City
☐ State Prov Code
☐ Verified
☐ Country Code
☐ Verified Comments

Sort By: ☒ Name ☐ ID

☐ Do Not Save All

Filter
Show All
Adjust Values
Sort

Validate And Save

Name and Address Changes

ID	Name	Changed	First	Middle	Last
1370	Chaney, Ida 1370	01/28/2002	Ida	1370	Chaney
☐ Do Not Save ☐ Verified		Address PO Box 1370 City Somewhere State MN Postal Code 12345- Country US			
315	Hancock, Alexander 315	03/07/2023	Alexander	315	Hancock
☐ Do Not Save ☐ Verified		Address address City somewhere State MN Postal Code 55555- Country US			

Payroll Utilities - Cleanup Paycheck Data

Cleanup Paycheck Data

Tab Selection

☐ Distribution
☐ Pay Code Stopped Rows
☐ Deduct Stopped Rows
☒ Pay Auth for TR Emps

Note: Reserved Word Regen needs to be run after changes to this window are complete to take effect.

Distribution Pay Code Stopped Rows Deduct Stopped Rows Pay Auth for TR Emps

Set all equal to Term Date

☐ Do Not Save All

ID	Name	Start Date	Stop Date	Term Date	Do Not Save
638817	ACOSTA, DARYL 638817	08/25/2014	00/00/0000	06/05/2019	☐
535449	AGUIRRE, MITCHELL 535449	08/28/1985	00/00/0000	05/29/2020	☐
112315	ATKINS, LORI 112315	01/30/2012	00/00/0000	05/27/2020	☐
193344	AYALA, LAUREN 193344	03/02/1998	00/00/0000	05/29/2020	☐
222737	BAIRD, CLAYTON 222737	09/08/2015	00/00/0000	08/26/2020	☐
838964	BARKER, LUZ 838964	08/28/2000	00/00/0000	01/03/2020	☐
439168	BARRERA, ROBIN 439168	09/03/1991	00/00/0000	01/08/2020	☐
1087	BEACH, AUBREY 1087	08/01/2021	00/00/0000	01/30/2023	☐
1147	BENDER, ESTHER 1147	10/18/2021	00/00/0000	01/30/2023	☐

Leave of Absence tracking

- ▶ Employee can enter request in eR *if turned on for district.*
- ▶ Notification can be sent to SMART dashboard *if turned on.*
- ▶ In HR - Place employee on Leave and Return them from Leave.

STAR Reporting

Unsure of changes at this point...

- ▶ Most years have some assignment or licensure changes
- ▶ Watching to see if they redo their file format-*if so, you will need new software*

Today's Agenda

- Mandatory Reminders
 - ✓ Q1: Jan-Mar
 - ✓ Q2: April-June
 - ✓ Q3: July -Sept
 - Q4: Oct-Dec
- Coming Soon
- Questions

Mandatory Reminders
Q4: Oct-Dec

ACA - ICHRA

We picked up more schools this year...
which required additional programming.

Please let your region know if you are
changing to this as soon as you decide...

*Information coming this fall on what is
needed to prep for C Form reporting...*

New 2026 W2 changes

- Box 12 for OT reporting (moved from 14)
- ?Unsure MNPL changes
- We are checking to see if there are Paid Leave W-2 requirements for any of the other tax states we support.

*Watch for more information coming this
fall from your regional center...*

Withholding States supported by SMART

Arizona (AZ)	Missouri (MO)
Colorado (CO) *PL	New York (NY) *PL
Connecticut (CT) *PL	Nebraska (NE)
Georgia (GA)	North Carolina (NC)
Hawaii (HI)	North Dakota (ND)
Illinois (IL)	Oklahoma (OK)
Iowa (IA)	Pennsylvania (PA)
Kansas (KS)	South Carolina (SC)
Michigan (MI)	Vermont (VT)
Minnesota (MN)	Wisconsin (WI)
No tax states:	Tennessee (TN)
Alaska (AK)	Texas (TX)
Florida (FL)	Washington (WA) *PL
Nevada (NV)	Wyoming (WY)
New Hampshire (NH)	
South Dakota (SD)	

ACA Insurance file changes

Please let your region know if you see that a file format has changed since the prior year.
We will look into it...

Today's Agenda

- ✓ Mandatory Reminders
 - ✓ Q1: Jan-Mar
 - ✓ Q2: April-June
 - ✓ Q3: July -Sept
 - ✓ Q4: Oct-Dec
- Coming Soon
- Questions

Coming Soon...

Setup Banks-removal of space in account

New checkbox added to remove space from account if that is the only change. You do NOT need to setup a new account if the change is just for payroll files...

The screenshot shows the 'Setup Banks' form with the following sections:

- Select**: Bank Account (192 356)
- Bank Information**:
 - Active: ☐
 - Routing No:
 - Bank Name:
 - Branch:
 - Address:
 - City:
 - State/Prov: MN Postal Code:
 - Phone: () -
 - Last Check: 153279 Last Record: 277760
 - Check Number Prefix:
 - Cash Account: 0101000
 - Recon Import: ☐ mn check recon record
- ACH Information**:
 - File Record (Type 1)**:
 - Immediate Destination: 0 Size: 10
 - Immediate Origin: 0 Size: 10
 - Immediate Destination Name: Bank Size: 23
 - Immediate Origin Name: Bank Size: 23
 - Batch Records (Types 5 & 8)**:
 - Company Name: ISD Size: 16
 - Company Discretionary Data: Payroll Size: 20
 - Company Identification: 14 Size: 10
 - Company Entry Description: PAYROLL Size: 10
 - Originating DFI Identification: 00000000 Size: 8
 - Is this US Bank? ☐
 - Ignore Acct Spaces**: ☐ (highlighted in red)

Please check with your region if you are unsure!

Setup District Forms - new hires

The screenshot shows the 'Setup District Forms' page with the following sections:

- Home My Payroll My Requests About Me Approval Responsibilities Setup**
- Setup Emp Activity**
 - Announcements
 - District Forms**
 - Setup Info to Review
 - Setup Questionnaires
 - Questionnaires Maintenance
- Forms**
- Copy From Attachment**:
- Only Viewable To New Hires**: ☐ (highlighted in red)
- New Hire Date**: mm/dd/yyyy
- Only Viewable To Selected Union Groups**: ☐
 - Admin
 - Business Mgr
 - Coaches
 - Community Education
- Only Viewable To Selected Assignment Groups**: ☐
- Form will be sent to employees below.**
- Sort Employees By**:
 - ☐ ID
 - ☒ Name
- Employee Count: 852**
- Table of employees:

533	533	ACOSTA, CRAIG 533
421	421	ADAMS, NELLIE 421

Seeing form activity

Announcements

District Forms

Setup Info to Review

eR Activity

Questionnaires

After highlighting filter options, click on the "Preview Employees" button and all of the employees that meet that criteria will be displayed. Note: The more criteria you select, the smaller the report.

Filter Options

Location

Location-005
Location-100
Location-300
Location-700

Primary Status

Active Employee
On Leave
Terminated

Secondary Status

Active 12 month Full Time
Active 10 month Full Time
Active 12 month Part Time
Active 10 month Part Time

Description Of Form

☒ Filter Deactivated
Minnesota Paid Leave Notification - 11/26/2025
Minnesota Paid Leave Notification - 11/26/2025

Form Viewed:

☐ Yes ☐ No

Form Signed:

☐ Yes ☐ No

Preview Employees

Print Employees

Export To Excel

Clear

Union

Terminated
Admin
School Board
Business Mgr

Assign Group

Barg Unit 01
Barg Unit 02
Barg Unit 03

Form Type

Contract Agreement
Cover Letter
Direct Deposit Form
Veterans Preference Form

Form Category

Code1 description
Code2 description

41 Employees found

Who's Viewed Forms

Minnesota Paid Leave Notification - 11/26/2025

ID	Name	View Date	Sign Date	Notifications Sent
3051	ALFORD, CASEY 3051		12/01/2025	5
735	AVILA, CECILIA 735	12/01/2025	12/01/2025	2
3004	AYALA, EBONY 3004		01/12/2026	5
3145	BLACK, ELSA 3145	11/27/2025	11/28/2025	1
3047	BOLTON, EMILY 3047	12/03/2025	12/03/2025	2
1001	BURKS, RAY 1001	12/08/2025	12/30/2025	5
640	CERVANTES, RYAN 640	12/04/2025	12/04/2025	3
3007	CROSS, FRED 3007	12/01/2025	12/01/2025	2
898	DILLARD, JESUS 898		01/14/2026	5
3103	DILLON, MARIAN 3103		12/12/2025	5
3031	DUDLEY, TERRY 3031	12/05/2025	12/03/2025	3
966	EATON, ROMAN 966	11/26/2025	11/26/2025	1
42	ESPINOZA, TOBY 42	11/30/2025	11/30/2025	2
3081	FLOWERS, DELORES 3081	12/17/2025	12/17/2025	5
187	FOX, CHERYL 187	12/01/2025	12/01/2025	2
882	GOOD, DANIEL 882	12/05/2025	12/05/2025	3
1000	HENDRICKS, ELMER 1000	01/02/2026	01/02/2026	5
952	HOLLOWAY, ERMA 952	12/10/2025	12/10/2025	4
969	KAUFMAN, TABITHA 969		01/06/2026	5
3048	KEITH, DOUG 3048	12/04/2025	12/04/2025	3
554	KINNEY, ALMA 554	01/09/2026	01/09/2026	5
552	LAWSON, GEORGIA 552	12/12/2025	12/12/2025	4
983	LAWSON, WINIFRED 983	11/29/2025	11/29/2025	1
987	MAXWELL, ANN 987	01/06/2026	01/06/2026	5
3080	MCMAHON, PATTY 3080		12/01/2025	5
930	MEYER, BILLIE 930		12/23/2025	5
1005	MICHAEL, PENNY 1005	01/21/2026	11/26/2025	1
799	NEWTON, ROLANDO 799	12/13/2025	12/01/2025	5
938	PATRICK, MARCIA 938		12/01/2025	5
984	PAYNE, ROSEMARY 984	12/17/2025	12/17/2025	5
3037	PEARSON, LEON 3037		12/02/2025	5
782	PRICE, VERONICA 782	12/01/2025	12/01/2025	2
594	SHAW, RICHARD 594	12/08/2025	12/08/2025	4
943	SHELTON, LAURIE 943	12/01/2025	12/01/2025	2
3067	SILVA, DANNY 3067		01/14/2026	5

Date effective user classes

When districts request user access changes, they will be able to have a start and stop date.

If an employee terminates before the new employee is hired, there will be a record of what access the previous employee had.

Sometimes the person decides to stay, so the stop dates can be taken out.

27

2027 - Paid Leave W-2 Adjustments

When an employee receives a benefit payment from the state or third party that is considered taxable income, an adjustment in SmarHR will be needed to adjust the employee's W-2 accordingly.

- *Will not apply to Self-Insured Payment options*

Questions

