

SmartHR

It pays to get it right

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INTRODUCTION

SmartHR is an easy way to keep track of all your employee information. It integrates seamlessly with SmartPayroll. This is now your one stop HR filing system, you'll never lose a thing again because all your employee info will be stored securely in the cloud.

Who can see the employees' information?

To see SmartHR you must have access to all the pay groups. Therefore if you have staff that only have limited access to SmartPayroll, they will not be able to see SmartHR.

Advantages of using SmartHR

- Documents (ie employment agreements, job descriptions and many more) online in one place where you can check and update as necessary
- Discipline and Dismissal procedures and templates you can use.
- Plus you can use SmartHR when you need samples of documents to save you having to design everything from scratch.

To sign up to SmartHR

To sign you up to SmartHR and take advantage of all the features:

1. Click on the SmartHR button. You'll see a list of SmartHR features when you log in for the first time.
2. Scroll to the bottom and click "**Sign me Up**"
3. Click on **Accept** to accept the terms and conditions. You can email yourself a copy from clicking the email icon.
4. That alerts us you've signed up and it will be automatically turned on for you.

It's as easy as that, SmartHR is the perfect partner to SmartPayroll because it pays to get HR right too.

HOME PAGE

Keeping track of your employees details and paperwork

Here you'll see a list of your employees. This shows all your staff 7 to a page. Use the arrow controls on the bottom right of the list to see more employees.

◀ 1 of 4 ▶

List of employees





1. **Your employees will already be loaded.** SmartHR automatically synchronises from your SmartPayroll list. Any changes you make in SmartPayroll will flow through to SmartHR so no data entry is required.

Your goal is to turn every employee from a SAD face to a HAPPY Face.


2. **If an employee is terminated** in SmartPayroll, the termination date will also come through to SmartHR and you'll have the option to remove them in SmartHR.

Document completeness

1. To ensure you have all the necessary legal documents on file and stored safely in one place you need to upload these documents for each employee and get a Smiley face.

Job Description	Employment Agreement	Admin
		 

100%
Documentation Completeness



If an employee has either created an employment agreement or uploaded one they will have a completed '**Employment Agreement**' column on the staff page. The same applies for the **Job Description**.

2. **The Admin column** is based on the checklist you create in the Settings tab. By default we give you 3 Admin checks; Health & Safety Training, Drug & Alcohol policy and Staff Handbook. You may add or remove them as required.

Once you've done that for each employee, all your documents will be online in one place where you can check and update them as necessary.

The Alerts window

1. One of the best features of SmarHR is the Alerts. This makes sure you never forget anything important again –like staff birthdays, work anniversaries, training courses need to be renewed, and all those small but important things you don't want to forget.
2. Alerts for the coming 7 days and going back for the previous 2 weeks are displayed and emailed to you based on your customised settings.

Employees' details

1. **Click on the employee's name**, or their profile picture, to see the details of that employee. You can make any changes you want from here.

Most of the Employee's details are maintained in SmartPayroll and replicated here. You can also add emergency contact details and a profile picture.

2. **The Alert list on the employee page** displays all alerts from 2 weeks ago. This also includes any annually recurring alerts. Here you can add and remove alerts for a staff member.
3. **To add an alert or emergency contact** click on the + signs. Don't forget to **save**.
4. **The Documents section** allows the user to select the key documents used, ie Employment Agreement and Job description. Over time an employee may have had more than one Employment Agreement or job description, or revisions and drafts. It's important to maintain in the system which of these documents are current.

Selecting documents from here is the key to achieving the 'Documentation Completeness'. Your current documents can be selected from both documents created in SmarHR or ones you have uploaded yourself.

Uploading files to the employee record

1. You are recommended to upload your own current files to the Employee record. Eg, scan and upload a signed Employment Agreement.
2. Most types of files are acceptable to upload, and we recommend limiting them to 20MB.
2. There's no limit on the number of files you may upload to the staff records. Click on 'Other Documents' in the Employee screen to upload your files.

Checks

1. This section is for important administrative reminders to be set. These checks are defined under 'Settings' tab.

2. The system has 3 already defined; Health & Safety Training, Drug & Alcohol Policy and Staff Handbook.

Note: These are generic checks that most businesses should be implementing.

3. You can add or remove the checks (from Settings) as required. When you add a new check, the associated check box appears under every staff member screen. Therefore every staff member needs to have this ticked to achieve 100% Documentation Completeness.

Linked Documents

All documents created in the Smart HR online apps for the staff member are shown in groups on the right. Clicking on the documents or icons on the right will open them for editing or download respectively:

- Employment Agreement Builder
- Job description library
- Performance Review Builder
- Disciplinary Builder

Employment Agreement Builder

Hiring a new employee just became a lot easier. You can easily use the Employment Agreement Builder to build a customised agreement for each person. All the various types of agreements from full time employee to casuals to contractors are there.

They've all been **written by our Expert Employment Law team** and are regularly reviewed and updated so they're always compliant, making sure you're -protected.

1. **There are 5 types of Agreement** available as templates to use within SmartHR; Full/part time, casual and fixed term Individual Employment Agreements, and 2x Independent Contractor Agreements.
2. **All are written by our in-house Employment Law team** and regularly reviewed for best practice and compliance. They are written with the employer in mind, ensuring your business has the best protection possible while operating within the New Zealand legislation.
3. **Agreements are saved against the Employee record.** From the Employee screen they can be re-opened at any point in the future. Agreements can also be downloaded in PDF and Word format.
4. **Once downloaded they can be re-uploaded** to the Employee screen under 'Other documents'. We recommend all signed Employment Agreements are scanned and uploaded to the appropriate employee.

Job Description Library

1. **More than 400** job descriptions are available for your use with the system.
2. **You can browse by industry** or search for keyword to locate a job description useful for their purpose.
3. **You can edit, save, download** or print from within SmartHR.
4. If you choose to save a job description you can then import this into your SmartHR Employment Agreements also.
5. If you download and edit you can either copy and paste your changes into an Employment Agreement schedule, or upload the file into the Employee screen to store.

Performance Review Builder

The Performance Review Builder provides a framework of performance appraisals for your employees. It provides a **structured, consistent and fair approach** to managing performance reviews.

1. **You can use the designed template** or you can customise your own, including your own KPIs and insert your goals and objectives.
2. **When the review is done** you then save the performance review to the employees file.

Disciplinary Document Builder

One of the most stressful parts of employing people is when things start to go bad.

The Disciplinary, Dismissals and Redundancies module helps you navigate through the minefield of steps when taking any action with employees.

From warning letters for absenteeism through to serious misconduct SmartHRs step by step processes and checklists will ensure you do everything you can to get it right.

RESOURCES

This page is a document and reference page with numerous guides and download materials.

The formats may vary between PDF and Word documents.

All documents and systems have been written and reviewed by our in-house qualified and experienced Employment Law specialist team.

They are provided and available for you to download and use as you want

SETTINGS


Admin checks

1. Admin checks are for important administrative reminders applicable for every employee.
2. As mentioned earlier the system has 3 already defined; Health & Safety Training, Drug & Alcohol Policy and Staff Handbook.
3. These are generic checks that most businesses should be implementing. You can add or remove the checks (from Settings) as required.
4. When you add a new check, the associated check box appears under every staff member screen. Every staff member then needs to have this ticked to achieve 100% Documentation Completeness.

Email settings

1. Email settings are also configured in the Settings page. SmartHR has the option to email alerts on daily or weekly frequencies.
2. The email addresses to receive the alerts need to be specified. Multiple emails need to be separated by commas.

Smart HR Help

Throughout SmartHR you will notice question mark  icons. Clicking on these will open useful tips to help you get the most from SmartHR.