



Frequently Asked Questions

Entertainment Partners
130 Bloor Street West, Suite 500
Toronto, ON M5S 1N5
CANADA
416-923-9255

Contents

General	2
Who do I contact for help with my existing SmartStart setup?	2
Who do I contact for training?	2
When do updates in SmartStart carry over to the SmartStart Pick List in EPOL?.....	2
Will crew members always need EP Residency to upload residency documents.....	2
Email Invitations	3
Can I change the email invite language?.....	3
Why can't I just send an invite link? Why do I have to fill out all these fields?.....	3
Start Packets and Forms	3
Why do I have to add notes as an Approver?	3
How do I add comments to a start packet?.....	3
Why are the union (non-member) permittee forms missing?	4
Is there a way to retrieve all start packets at the end of production?	4
Why can't crew members report conflicts of interest in SmartStart?.....	4
A crew member emailed me their document(s). How do I add it to their start packet?.....	4
Roles, Permissions, and Settings	6
How do I set up Approvers?	6
Is there a way to change the Approvers in SmartStart?	7
I get too many emails from SmartStart. How do I change my settings?	8
Why can't other people see the flags I assign?	9
How do I make sure hiring managers only view the offers they create?	9
Rates and Compensation	9
The wrong rates are coming up for an offer. How do I fix this?	9
There is a minimum wage increase coming up. Will those rates update in SmartStart?	10
Hiring and Deal Memos	11
How do I edit an offer?	11
How do I create a manual packet in SmartStart?	11
Why are there no signatures on the deal memos?.....	12
Is there a way to send the same job offer to multiple people?.....	12
I'm trying to edit an offer that was already sent to the crew member, but it is not letting me. What are my next steps?.....	13
How do I handle a re-rate in SmartStart?.....	14
How do I add a Schedule 8 to my system?.....	14
Can you add the Direct Deposit Authorization form to the start packets?.....	14

General

Who do I contact for help with my existing SmartStart setup?

The Canadian Account Management team can answer questions about your SmartStart setup at amcanada@ep.com.

Who do I contact for training?

The Canadian Account Management team can take your training requests at amcanada@ep.com. You'll be connected with a Canadian Account Management team member. The Canadian Account Management team member coordinates your EP Academy eLearning to build foundational product knowledge and follow-up one-on-one sessions (if needed).

When do updates in SmartStart carry over to the SmartStart Pick List in EPOL?

The SmartStart Picklist updates when you sign in to EPOL. To force an update:

1. From EPOL, click Tools in the header.
2. Click Employee from the dropdown.
3. Then, click Forced Update SmartStart Pick List to update.

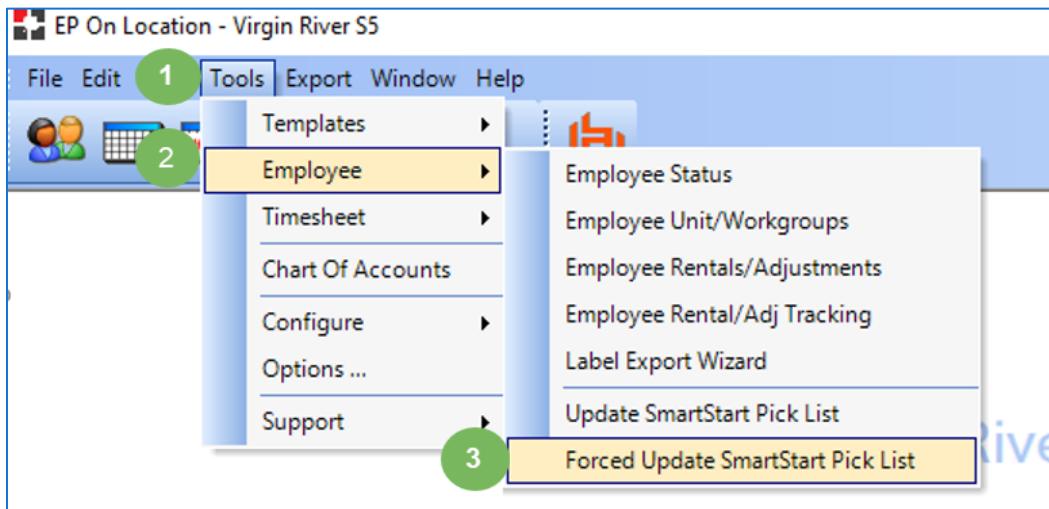


Figure 1: Forced Update SmartStart Pick List

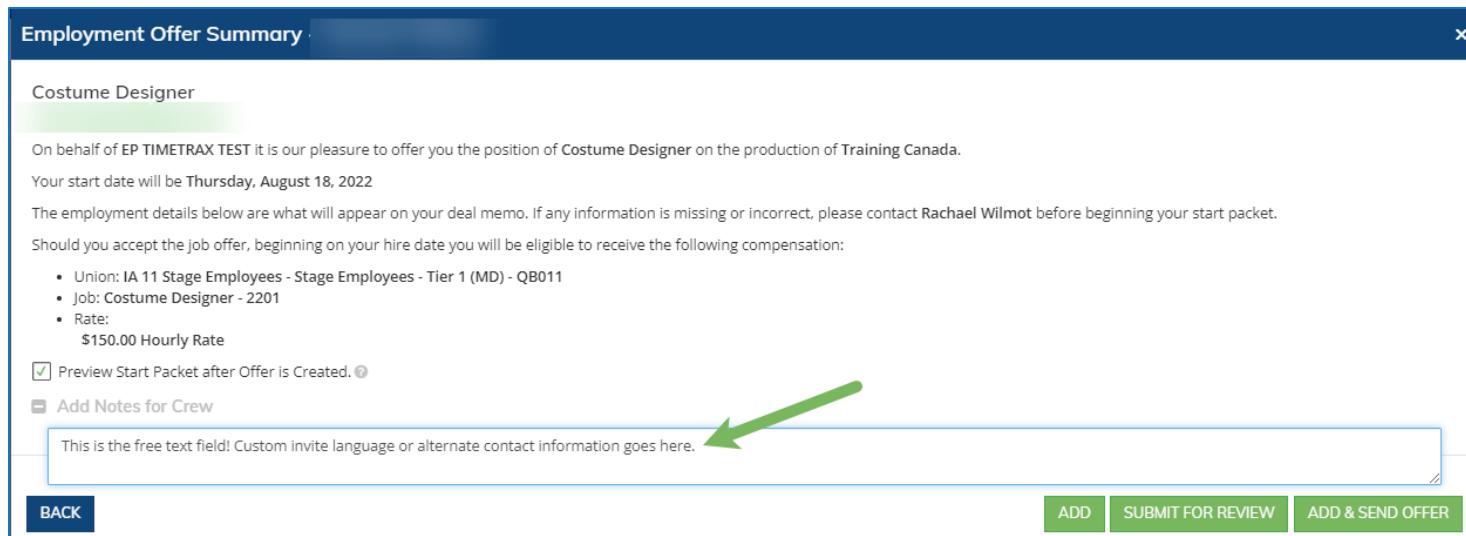
Will crew members always need EP Residency to upload residency documents?

SmartStart and EP Residency are integrated into one experience for crew members.

Email Invitations

Can I change the email invite language?

You can send custom email invite language from the Employment Offer Summary. Click Add Notes for Crew for a free text field. You can also use this field to update who the point of contact is for the crew member.



The screenshot shows the 'Employment Offer Summary' page for a 'Costume Designer' position. The page includes details about the start date (Thursday, August 18, 2022) and compensation (Union: IA 11 Stage Employees - Stage Employees - Tier 1 (MD) - QB011, Job: Costume Designer - 2201, Rate: \$150.00 Hourly Rate). There are checkboxes for 'Preview Start Packet after Offer is Created' and 'Add Notes for Crew'. A green arrow points to the 'Add Notes for Crew' field, which contains the placeholder text: 'This is the free text field! Custom invite language or alternate contact information goes here.'

Figure 2: Employment Offer Summary, Add Notes for Crew

Why can't I just send an invite link? Why do I have to fill out all these fields?

SmartStart is a secure, invite-only system. The hiring manager needs to create and define the offer before sending it to the crew member to ensure accuracy. The crew member then signs in to SmartStart, creating an account if they do not already have one. By creating an account, the crew member acknowledges they are the person whose identity is being verified, helping to ensure security.

Start Packets and Forms

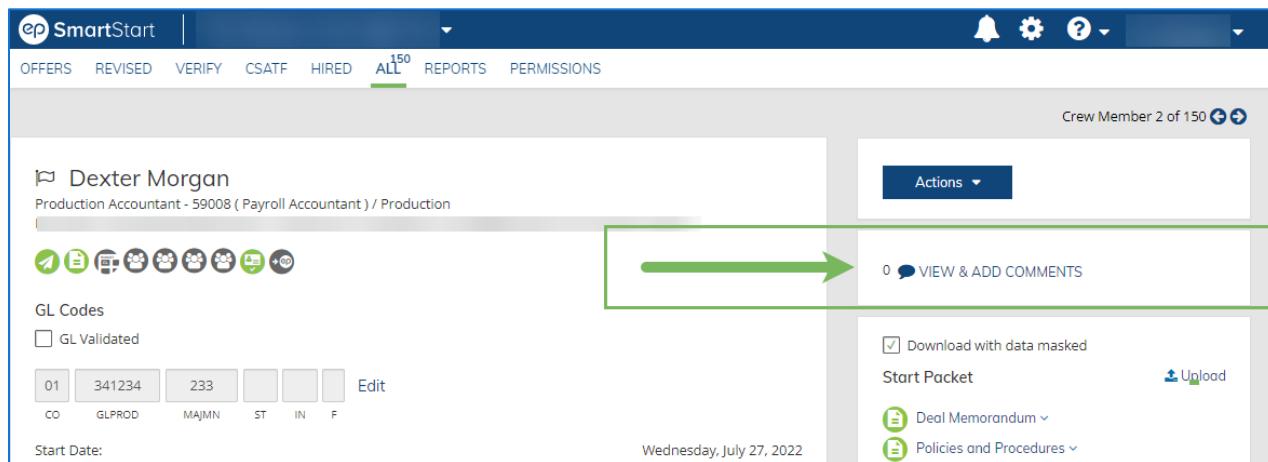
Why do I have to add notes as an Approver?

As an Approver, your responsibilities include approving or denying deals while adding notes on your decision for the production's records. Notes are required when you deny and optional when you approve.

How do I add comments to a start packet?

1. Click on the crew member's crew card from any tab (like All or Hired) to access.

2. Click on **View & Add Comments**. Add your comment.
3. Click the **Add Comment** button to finish.



The screenshot shows the SmartStart software interface. At the top, there is a navigation bar with tabs: OFFERS, REVISED, VERIFY, CSATF, HIRED, ALL¹⁵⁰, REPORTS, and PERMISSIONS. The 'ALL' tab is selected. On the right side of the interface, there is a 'Actions' dropdown menu. Below it, a green arrow points to a button labeled '0 **VIEW & ADD COMMENTS**'. To the right of this button, there are several other options: 'Download with data masked' (with a checked checkbox), 'Start Packet' (with a 'Upload' button), 'Deal Memorandum', and 'Policies and Procedures'.

Figure 3: View & Add Comments

Why are the union (non-member) permittee forms missing?

These forms are being added to SmartStart. Continue to distribute the union permittee forms for now.

Is there a way to retrieve all start packets at the end of production?

If your production uses Scenechronize SmartHub, the Publish to Scenechronize option is available for seamless start packet file uploads. The Canadian Account Management team can take your Publish to Scenechronize requests at amcanada@ep.com.

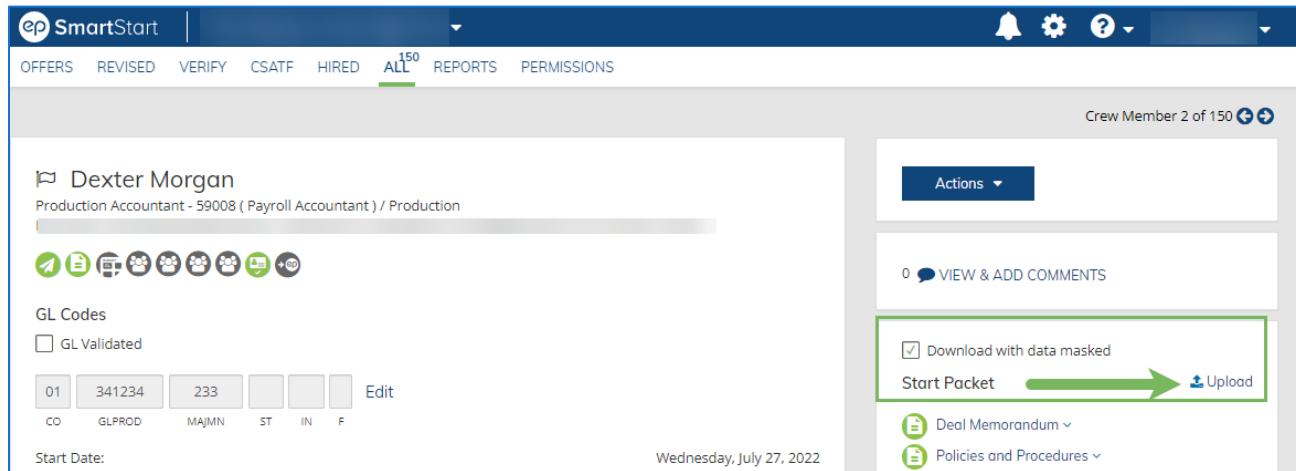
If your show is not using Scenechronize SmartHub, Canadian Account Management can take requests for a ZIP file archive. This is a one-time process. As a best practice, be sure to submit requests after all hiring is complete.

Why can't crew members report conflicts of interest in SmartStart?

Conflict of interest forms and questionnaires can be added to SmartStart via a custom request that comes with cost implications. The Canadian Account Management team can take your requests at amcanada@ep.com.

A crew member emailed me their document(s). How do I add it to their start packet?

Click on the crew member's name from any tab (like Hired or All) to open their crew drill-down page. On the right side, in the Start Packet section, click the **Upload** link.



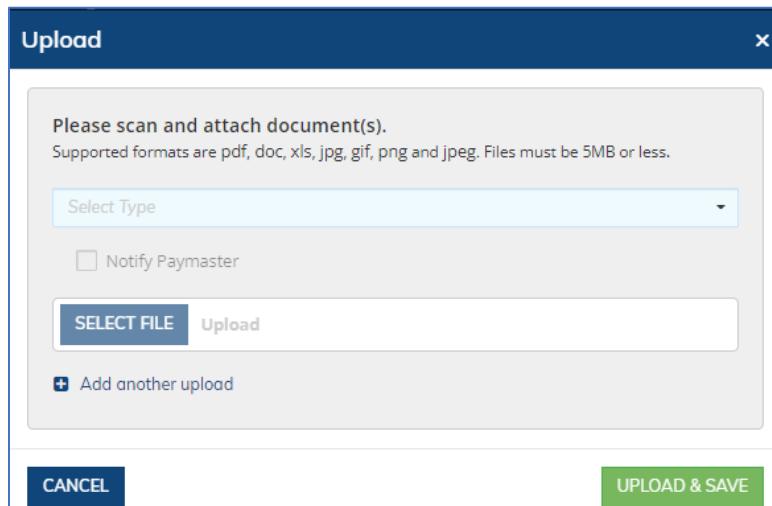
The screenshot shows the SmartStart software interface. At the top, there is a navigation bar with tabs: OFFERS, REVISED, VERIFY, CSATF, HIRED, ALL¹⁵⁰, REPORTS (which is the active tab), and PERMISSIONS. Below the navigation bar, a crew member profile for 'Dexter Morgan' is displayed, including their title 'Production Accountant - 59008 (Payroll Accountant) / Production' and various icons for managing the profile. On the right side, there is a sidebar with 'Actions' dropdown, 'VIEW & ADD COMMENTS' (0), and a section for 'Start Packet' with a checked 'Download with data masked' option and a green 'Upload' button. Below the sidebar, there are links for 'Deal Memorandum' and 'Policies and Procedures'.

Figure 4: Upload link

In the Upload screen:

1. Choose the document type from the dropdown (Select Type).
2. Click the **Select File** button and go to your document.
3. Click **Add another upload** to add more.
4. When finished, click the **Upload & Save** button.

Note: If the packet is already approved or in the process of being approved when you upload documents, you'll also need to send all documents through EP Live to your EP Paymaster.



The screenshot shows the 'Upload' dialog box. It has a 'Select Type' dropdown, a 'Notify Paymaster' checkbox, a 'SELECT FILE' button with an 'Upload' label, and a 'Add another upload' link. At the bottom, there are 'CANCEL' and 'UPLOAD & SAVE' buttons. A green arrow points to the 'UPLOAD & SAVE' button.

Figure 5: Upload screen

Roles, Permissions, and Settings

How do I set up Approvers?

Approvers are set up by your SmartStart Project Setup user from the Approvals screen. Add more than one approver at a level or skip a level if needed (except the Submit to EP level). To get started, select Approvals Setup from your account dropdown menu to access the Approvals screen.

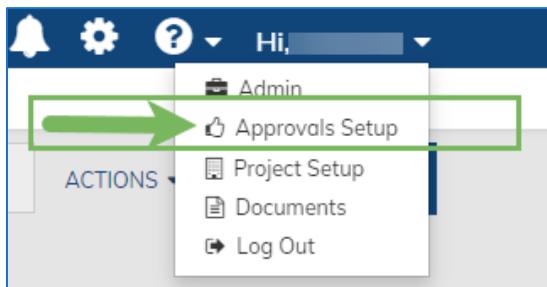


Figure 6: Approvals Setup

Note: Access to Approvals Setup option is permissions-based. Find out who to contact to get access or make changes under your Help menu.

To add an Approver:

1. Click the **Add Approver** button. Then, type the user's name or email to search and select.

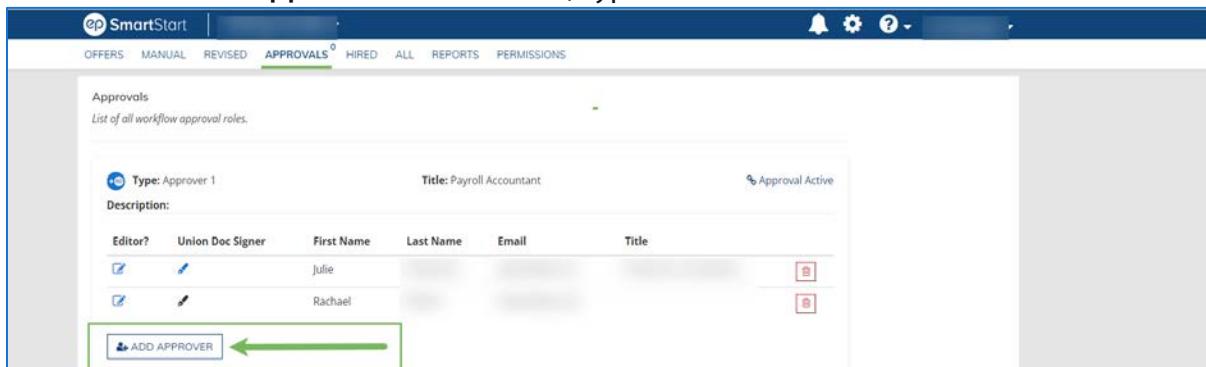


Figure 7: Approvals screen, Add Approver button

Note: To add as an Approver, the user must already be added in SmartStart. If not, select the Permissions link to navigate to the Permissions tab and add them there (Gatekeepers only).

2. Click Add New User when done.

Email:

Enter in an email of a user on the project in the box below. If the user does not exists, navigate to Permissions tab and add the user.



Figure 8: Add New User

Is there a way to change the Approvers in SmartStart?

With the Project Setup permission, you can access Approvals Setup. From Approvals:

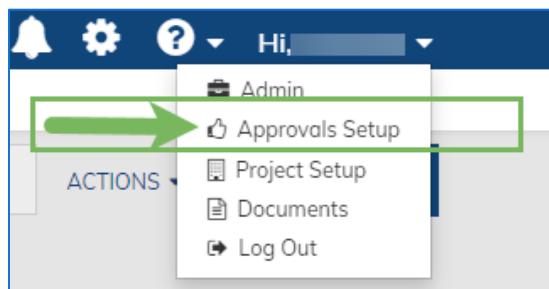
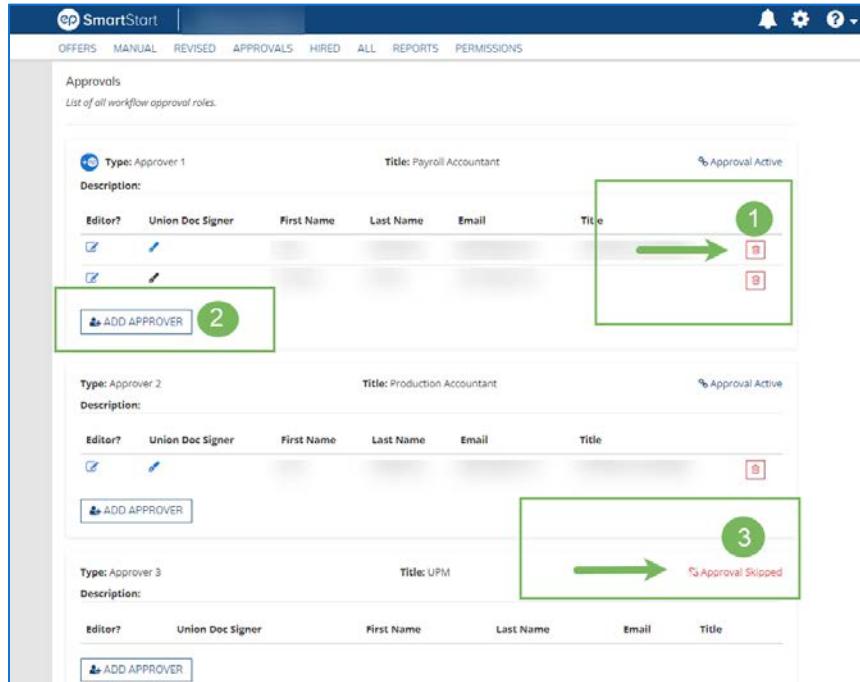


Figure 9: Approvals Setup

1. Delete an Approver
2. Add a new Approver.
3. Skip an approval level by removing all Approvers at that level (not available at the Send to EP level, which is indicated by an EP logo icon). Reactivate an approval level by adding an Approver backed to a skipped level.



The screenshot shows the 'Approvals' section of the SmartStart application. It lists three approval roles with their details and status:

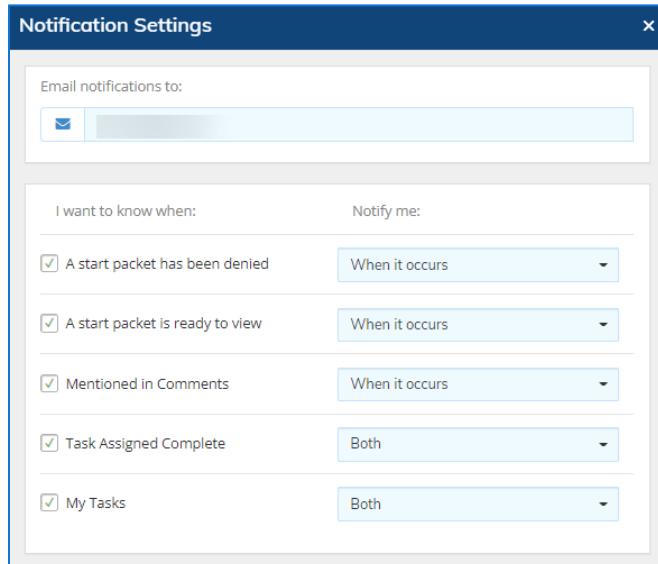
- Approver 1:** Type: Approver 1, Title: Payroll Accountant, Status: Approval Active. A green box labeled '1' indicates the approval is active.
- Approver 2:** Type: Approver 2, Title: Production Accountant, Status: Approval Active. A red box labeled '2' indicates the approval is active.
- Approver 3:** Type: Approver 3, Title: UPM, Status: Approval Skipped. A green box labeled '3' indicates the approval is skipped.

Each row includes fields for Editor?, Union Doc Signer, First Name, Last Name, Email, and Title, along with an 'ADD APPROVER' button.

Figure 10: Approvals screen

I get too many emails from SmartStart. How do I change my settings?

Determine the frequency of email notifications (when it occurs, in a daily summary, or both) or turn off specific notifications by unchecking the box (gear icon).



The 'Notification Settings' dialog box allows users to configure email notifications for various events:

- Email notifications to:** A text input field containing an email address.
- I want to know when:** A list of events with checkboxes:
 - A start packet has been denied
 - A start packet is ready to view
 - Mentioned in Comments
 - Task Assigned Complete
 - My Tasks
- Notify me:** A dropdown menu for each event, with options: When it occurs, Both, or a gear icon for daily summary.

Figure 11: Notification Settings

Why can't other people see the flags I assign?

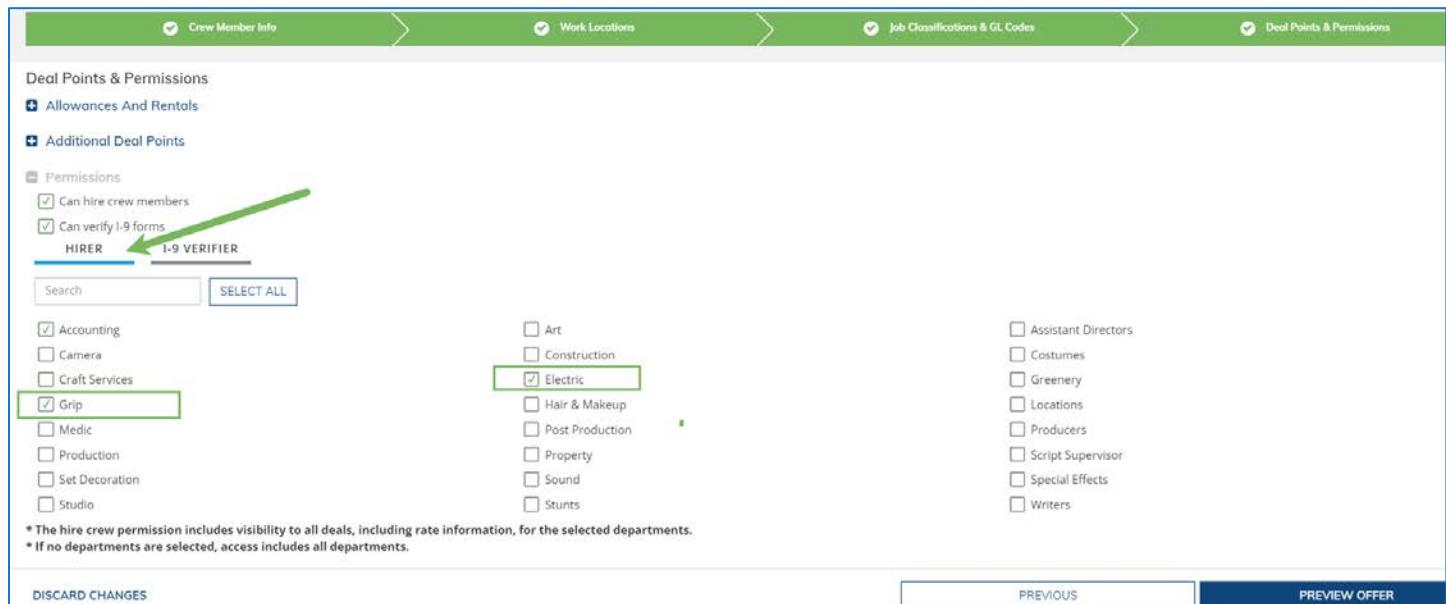
Flags are your personal note-taking system in SmartStart. The flags you set are not visible to anyone else in SmartStart.

Note: Flags can also be used under Filters to create custom reports based on criteria not included in the filter options.

How do I make sure hiring managers only view the offers they create?

Hiring managers can only view the offers they create as a default. They can view other offers if:

- Your project's Gatekeeper(s) assigns the Full Crew permission.
- A hiring manager's permissions include access to a department(s) — then the hiring manager can view all deals for that department(s).



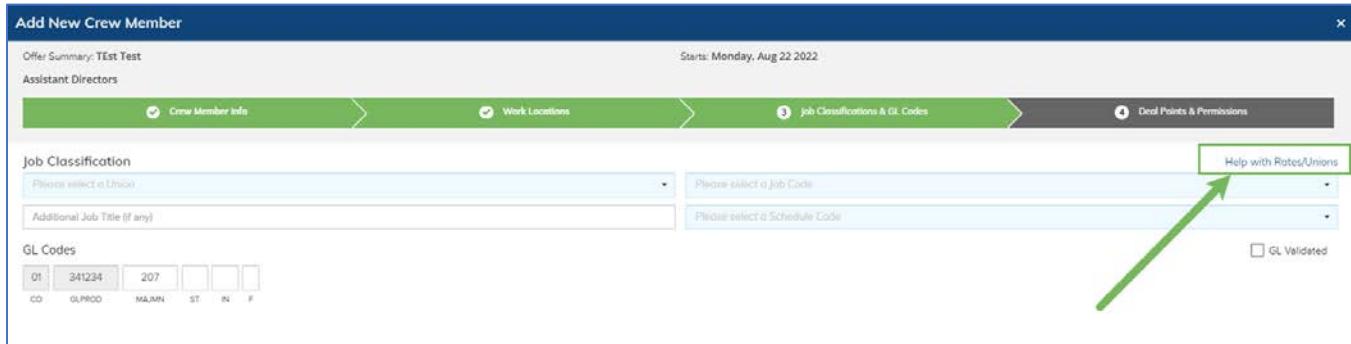
The screenshot shows the 'Deal Points & Permissions' section of the SmartStart interface. At the top, there are four tabs: 'Crew Member Info', 'Work Locations', 'Job Classifications & GL Codes', and 'Deal Points & Permissions'. The 'Deal Points & Permissions' tab is active. Below the tabs, there are sections for 'Allowances And Rentals' and 'Additional Deal Points'. Under 'Additional Deal Points', there is a 'Permissions' section with two checkboxes: 'Can hire crew members' (checked) and 'Can verify I-9 forms' (checked). A green arrow points from the 'HIRER' label to the '1-9 VERIFIER' label. Below these checkboxes are 'Search' and 'SELECT ALL' buttons. The main area contains a list of departments with checkboxes: Accounting, Camera, Craft Services, Grip (checked), Medic, Production, Set Decoration, Studio, Art, Construction, Electric (checked), Hair & Makeup, Post Production, Property, Sound, and Stunts. To the right of the departments are additional checkboxes: Assistant Directors, Costumes, Greenery, Locations, Producers, Script Supervisor, Special Effects, and Writers. At the bottom of the interface, there are notes: '* The hire crew permission includes visibility to all deals, including rate information, for the selected departments.' and '* If no departments are selected, access includes all departments.' There are also 'DISCARD CHANGES', 'PREVIOUS', and 'PREVIEW OFFER' buttons.

Figure 12: Access to departments for a hiring manager

Rates and Compensation

The wrong rates are coming up for an offer. How do I fix this?

Report incorrect or missing contract information from the Help menu. Click on the question mark icon and choose **Help with Rates/Unions**. Fill out the required fields and click **Send**.



Add New Crew Member

Offer Summary: Test Test Starts: Monday, Aug 22 2022

Assistant Directors

1 Crew Member Info > 2 Work Locations > 3 Job Classifications & GL Codes > 4 Deal Points & Permissions

Job Classification

Please select a Union

Please select a Job Code

Please select a Schedule Code

Help with Rates/Unions

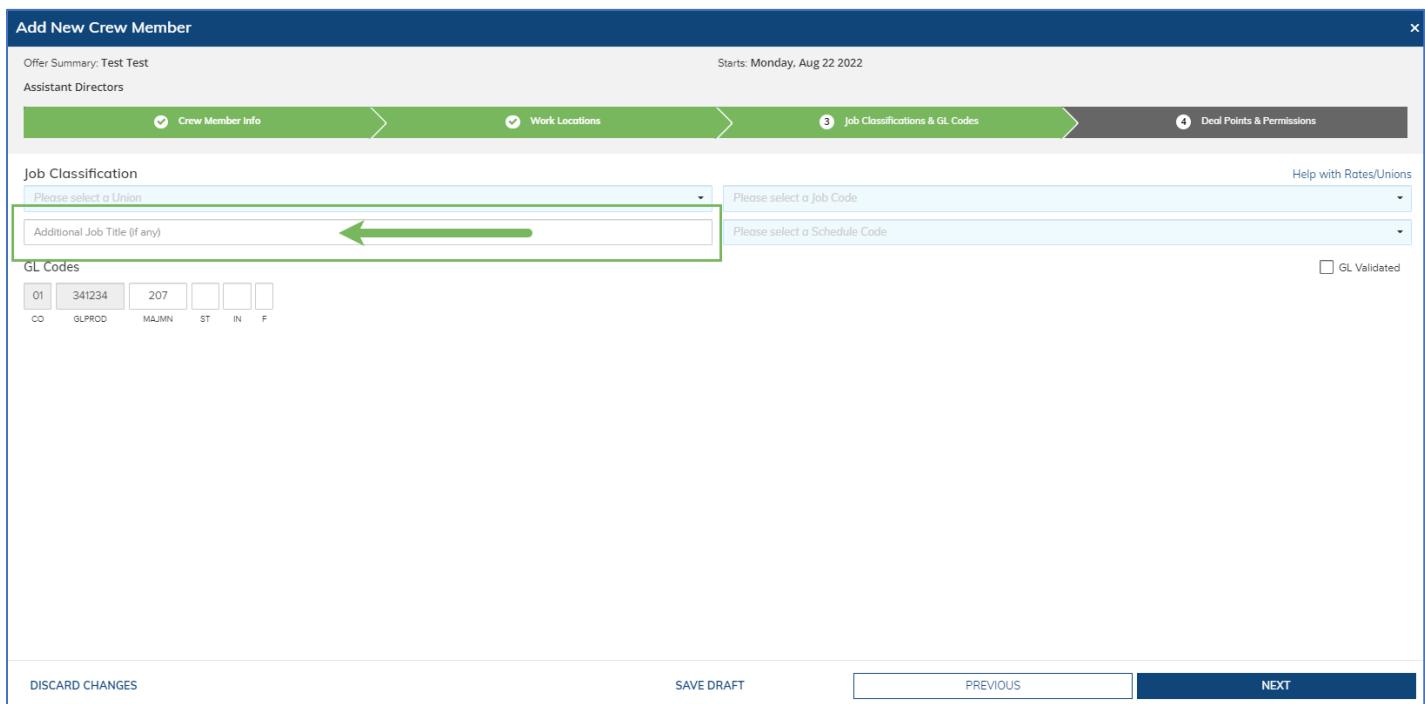
GL Codes

01	341234	207	MAJMN	ST	IN	F
CO	GLPROD					

GL Validated

Figure 13: Help with Rates/Unions

Incorrect or missing Job Title? There's no need to report. Enter the Job Title in the Additional Job Title field on an offer to capture.



Add New Crew Member

Offer Summary: Test Test Starts: Monday, Aug 22 2022

Assistant Directors

1 Crew Member Info > 2 Work Locations > 3 Job Classifications & GL Codes > 4 Deal Points & Permissions

Job Classification

Please select a Union

Help with Rates/Unions

Additional Job Title (if any)

Please select a Job Code

Please select a Schedule Code

GL Codes

01	341234	207	MAJMN	ST	IN	F
CO	GLPROD					

GL Validated

DISCARD CHANGES SAVE DRAFT PREVIOUS NEXT

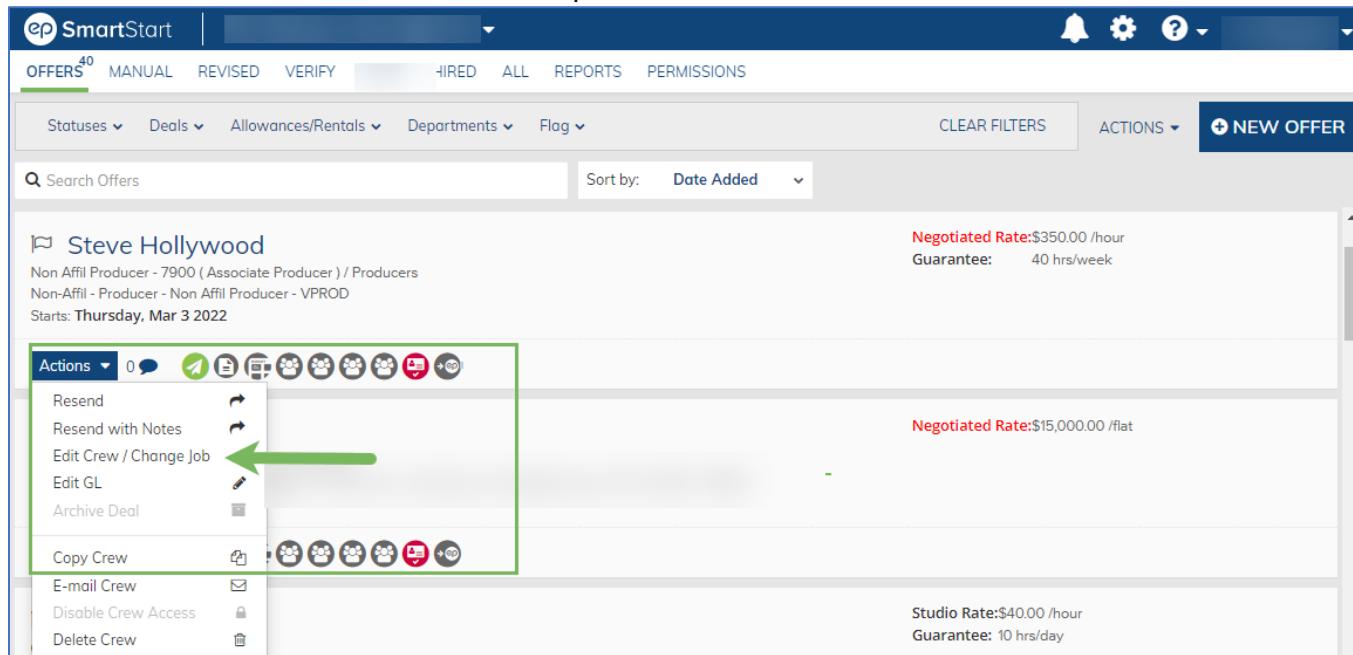
Figure 14: Additional Job Title

There is a minimum wage increase coming up. Will those rates update in SmartStart?
Yes. Minimum wage increases are automatically updated.

Hiring and Deal Memos

How do I edit an offer?

On each crew card and crew drill-down is an Actions drop-down menu. This dropdown lists options for modifying or working with an offer. The Edit Crew and Change Job options are how Editors can edit a crew member's deal information or update their job information. Don't have access to the Edit Crew/Change job option? Contact your production's SmartStart Editors. You can find their contact info under the Help icon.

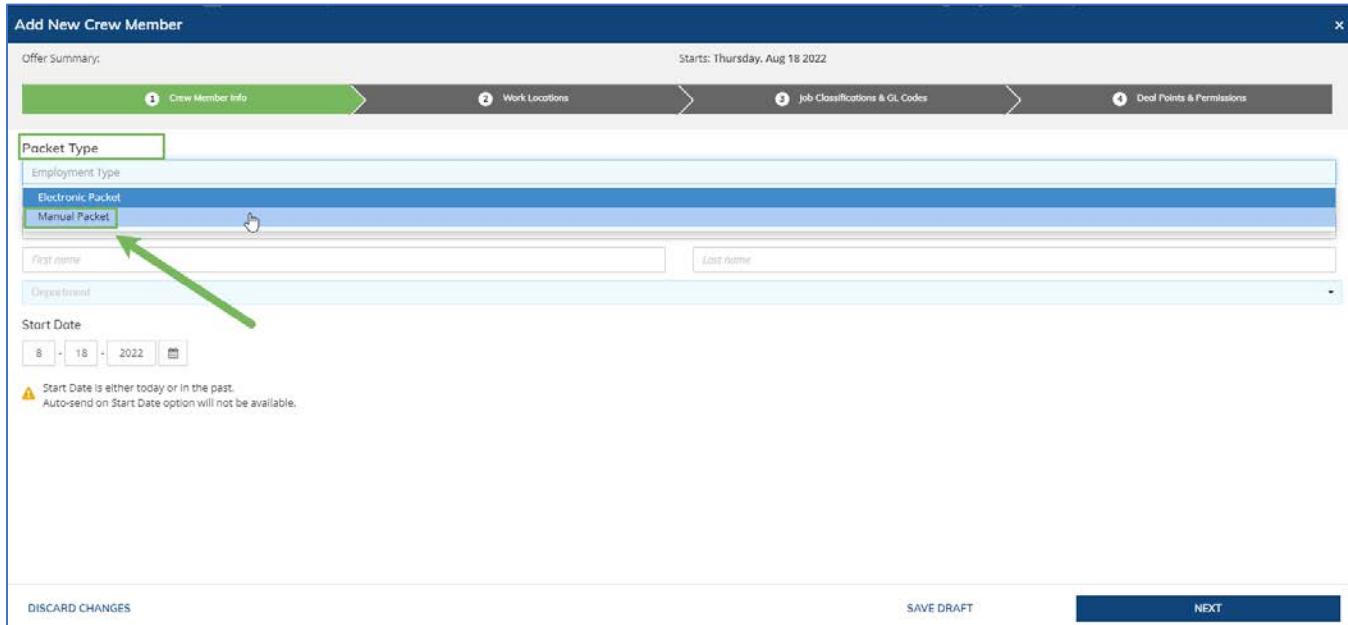


The screenshot shows the SmartStart Offers interface. At the top, there's a navigation bar with tabs for OFFERS (40), MANUAL, REVISED, VERIFY, HIRED, ALL, REPORTS, and PERMISSIONS. Below the navigation is a search bar with filters for Statuses, Deals, Allowances/Rentals, Departments, and Flag, along with buttons for CLEAR FILTERS and ACTIONS. A prominent 'NEW OFFER' button is on the right. The main content area displays a list of offers. One offer for 'Steve Hollywood' is shown in detail. The 'Actions' dropdown menu for this offer is open, highlighting the 'Edit Crew / Change Job' option with a green arrow. Other actions listed include Resend, Resend with Notes, Edit GL, Archive Deal, Copy Crew, E-mail Crew, Disable Crew Access, and Delete Crew. To the right of the offer details, negotiated and studio rates, guarantees, and start dates are listed.

Figure 15: Actions, Edit Crew/Change Job

How do I create a manual packet in SmartStart?

Click on the New Offer button (available in all tabs, except Reports) to open a new offer. Select Manual Packet as the Packet Type and fill out the crew, emergency contact, and job information before selecting either Save as Draft or Preview Offer.



The screenshot shows the 'Add New Crew Member' interface. At the top, there's a 'Offer Summary' section with a date 'Starts: Thursday, Aug 18 2022'. Below it is a progress bar with four steps: '1 Crew Member Info', '2 Work Locations', '3 Job Classifications & GL Codes', and '4 Deal Points & Permissions'. The 'Packet Type' section is highlighted with a green box. It shows 'Employment type' as 'Electronic Packet' and 'Manual Packet' (which is selected and highlighted with a green box and a green arrow pointing to it). Below this are fields for 'First name', 'Last name', 'Department', and a 'Start Date' calendar showing '8 - 18 - 2022'. A warning message at the bottom left says: '⚠ Start Date is either today or in the past. Auto-send on Start Date option will not be available.' At the bottom are buttons for 'DISCARD CHANGES', 'SAVE DRAFT', and 'NEXT'.

Figure 16: Manual Packet

Note: Manual packet offers are not sent to crew. Manual packets allow you to create a record of the deal in SmartStart for organization and seamless reporting across your project's information.

Why are there no signatures on the deal memos?

When a crew member signs their start packet forms in SmartStart, they choose "I Agree." This generates a secure signature made up of a unique combination of letters and numbers (a GUID) tied to the crew member's IP address and a date and time stamp.

Is there a way to send the same job offer to multiple people?

On each crew card and crew drill-down page, there is an Actions drop-down menu. This dropdown lists options for modifying or working with a given offer. The Copy Crew, found under the Actions dropdown, will copy the entered deal points but not the crew's name or email. Select Copy Crew to save data entry time.



ep SmartStart | OFFERS⁴⁰ MANUAL REVISED VERIFY HIRED ALL REPORTS PERMISSIONS

Statuses Deals Allowances/Rentals Departments Flag CLEAR FILTERS ACTIONS NEW OFFER

Search Offers Sort by: Date Added

Steve Hollywood
Non Affil Producer - 7900 (Associate Producer) / Producers
Non-Affil - Producer - Non Affil Producer - VPROD
Starts: Thursday, Mar 3 2022

Negotiated Rate: \$350.00 /hour
Guarantee: 40 hrs/week

Actions 0

- Resend
- Resend with Notes
- Edit Crew / Change Job
- Edit GL
- Archive Deal
- Copy Crew
- E-mail Crew
- Disable Crew Access
- Delete Crew

Negotiated Rate: \$15,000.00 /flat

Studio Rate: \$40.00 /hour
Guarantee: 10 hrs/day

Figure 17: Manual Packet

I'm trying to edit an offer that was already sent to the crew member, but it is not letting me. What are my next steps?

Editing offers are permission-based and can be handled by those with the Editor permission for your SmartStart project. Need the Editor permission? Project Setup users with access to Approvals Setup can make this update. To assign this permission from Approvals Setup, select the pencil and paper icon on the left, under the "Editor?" column. When the permission is assigned, the icon highlights.

ep SmartStart | OFFERS⁴⁰ [MANUAL](#) [REVISED](#) [VERIFY](#) [CSATF](#) [HIRED](#) [ALL](#) [REPORTS](#) [PERMISSIONS](#)

[Approvals](#)

List of all workflow approval roles.

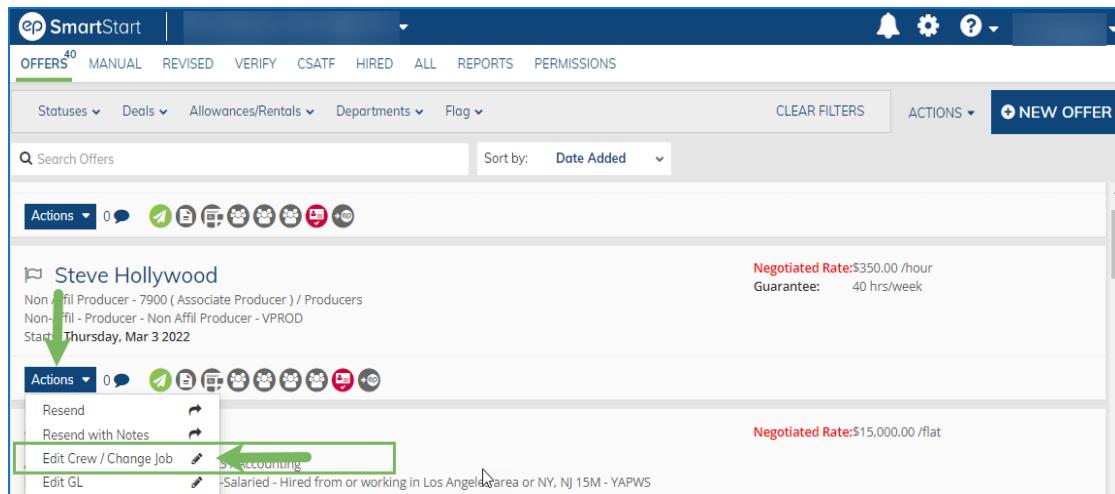
Editor?	DGA Signer	First Name	Last Name	Email	Title	Approval Active
		Dottie	Hinson	epsmartrnning+DottieH@gmail.com	Production Accountant	
		Dexter	Morgan	pracctep@gmail.com	Production Accountant	

Figure 18: Editor

How do I handle a re-rate in SmartStart?

Re-rates can be handled on the timecard or in SmartStart. To update in SmartStart:

1. Click Actions, then Edit Crew/Change Job.
2. Under "What type of change?" Select Job Change/Rate Change and update the rate information.



The screenshot shows the SmartStart software interface. At the top, there is a navigation bar with links for OFFERS (40), MANUAL, REVISED, VERIFY, CSATF, HIRED, ALL, REPORTS, and PERMISSIONS. Below the navigation bar is a search bar with 'Search Offers' and a 'Sort by: Date Added' dropdown. On the right, there are buttons for 'CLEAR FILTERS', 'ACTIONS', and 'NEW OFFER'. The main content area displays a list of offers. One offer for 'Steve Hollywood' is selected. The offer details include 'Non-Affil Producer - 7900 (Associate Producer) / Producers' and 'Non-Affil - Producer - Non Affil Producer - VPROD'. The start date is listed as 'Thursday, Mar 3 2022'. To the right of the offer details, it shows 'Negotiated Rate: \$350.00 /hour' and 'Guarantee: 40 hrs/week'. Below the offer details, there is an 'Actions' dropdown menu with several options: Resend, Resend with Notes, Edit Crew / Change Job, Edit GL, and Salaried - Hired from or working in Los Angeles Area or NY, NJ 15M - YAPWS. The 'Edit Crew / Change Job' option is highlighted with a green box and a green arrow pointing to it.

Figure 19: Edit Crew/Change Job

How do I add a Schedule 8 to my system?

Canadian union deal memos are already available in SmartStart.

Note: The Schedule 8 form is the deal memo document used by the Directors Guild of Canada. All forms for DGC Schedule 8 are already available in SmartStart and are added automatically when applicable.

Can you add the Direct Deposit Authorization form to the start packets?

Yes, Direct Deposit Authorizations are available when applicable.

Need help?

Contact EP Product Support Canada (Toronto & Vancouver):

clientsupport@epcanada.com