

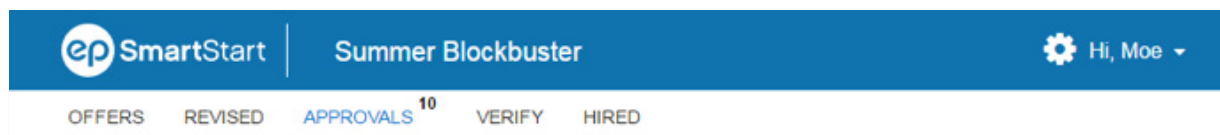
The following steps will describe your workflow as an Approver on **SmartStart**. These instructions will walk you through reviewing, then approving or denying a deal, editing a deal, editing a GL, entering and reviewing notes, uploading documentation, and changing your notification preferences.

Typically, a production will have multiple Approvers, with the first or second Approver also having editing abilities. In this **Quick Start Guide**, the second Approver is set to have editing abilities. Individual permissions will vary by production.

Reviewing a Deal

As an Approver, your primary responsibility in **SmartStart** is reviewing a crew member's deal and either providing your approval or denying the deal with notes on your decision. To review a deal:

1. Open an internet browser [Google Chrome is recommended] and navigate to: smartstart.ep.com. Enter your login credentials. The **SmartStart** page will appear.



2. Click on the **Approvals** tab.



The available deals to approve will appear on the top, and deals that you cannot take an action on yet will be underneath.

3. To search for a particular crew member's deal, use the **Search** field or sorting and filtering options.





The individual entries in the **Approvals** tab will present high level information on individual crew members. This information includes the crew member name, department, job, state date, and rate. Status icons also indicate statuses of crew member documents. Green icons indicate completed tasks, grey icons indicate incomplete tasks, and red icons indicate tasks that are overdue or denied.

Amber Maddison
UPM-EAST (WEEKLY) - 2800 / Assistant Directors
DGA - UPM & AD'S EAST COAST
Starts: Friday, Dec 16 2016

Scale Rate: \$4,794.00/week

Actions ▾ 0     MH CH LF  

APPROVE  

4. To see more information about an employee, drill down to view an employee's deal by clicking on their name.

Debbie Waddell
SENIOR SET DESIGNER - 7610 / Set Decoration
800 - SET DESIGN
Starts: Saturday, Dec 17 2016

Actions ▾ 0     MH CH LF  

A summary of the employee's deal will appear.

Debbie Waddell
SENIOR SET DESIGNER - 7610Set Decoration
800 - SET DESIGN

01 341234 239 

CO GLPROD MAJMN ST IN F

Start Date: Saturday, December 17, 2016

Employment Satuts: Full-Time Employee

Compensation

Studio Rate

Scale Hourly Rate: \$48.86

Crew Member 1 of 15  

Start Packet 

[Deal Memo](#)
[Deal Memorandum](#)
[Form W-4](#)
[Notice of Exchange](#)
[Policies and Procedures](#)
[I_9_Form_PWE](#)
[W4 Form 2016](#)

[Emails and Offers Sent](#)



5. Review all information provided in the deal memo, focusing attention on the following:

- Ensure the GL Code matches the budget and is entered correctly at the top of the deal memo.
- If applicable, ensure **Box Rental**, **Cell Phone**, and/or any other allowance amounts are correct. Documentation must be provided for allowances. For example:

→ **Box Rental**

Box Rental Inventory/Additional Equipment List

→ **Car**

Insurance and Registration

→ **Cell Phone**

Cell Phone Billing Statement

→ **Resident State**

Proof of Residency

- If the crew member is a loan-out, articles of incorporation must be uploaded.
- All documents that the crew members have signed are on the right-hand side. You can click to view, download, or print.

NOTE: For more information on uploading documents, see the **Uploading Documents** section.

6. Once all necessary information has been reviewed, navigate back to the deals to approve by clicking on the **Approvals** tab.





Approving a Deal

Once a deal has been reviewed, it can be approved and sent to the next Approver for their review. To approve a deal:

1. Click the green **Approve** button.



The crew member will then be moved from the **Approvals** tab. Once all necessary approvals have been given, the data will be submitted to EP.

Denying a Deal

Denying a deal will send the deal back to the first Approver for review and potential editing. It is important in denying a deal to first include notes clearly stating the reason for denying a deal. If a crew member's deal memo is denied, their status icon will appear in red. To deny a deal:

1. Click the red **Deny** button.



The **Don't Approve Paperwork** window will appear.

2. Enter a reason for denying the crew member's deal in the space provided.

The dialog box titled "Don't Approve Paperwork" has a blue header bar with a close button (X). Below the header is a text input field with a red border, containing the text "The employee was not approved for a computer rental." At the bottom of the dialog are two buttons: a blue "CANCEL" button and a green "DON'T APPROVE" button.

NOTE: For more information notes, see the **Entering and Reviewing Notes** section.



3. Click the **Don't Approve** button.

DON'T APPROVE

What happens next depends on whether or not you are set up with editing permissions.

If you are only providing approval, a status screen will appear next to the crew member's name showing that you did not approve the crew member, and will indicate the Approver to which the deal was sent back to for review.

Or

If you are designed with editing permissions, the **Edit Crew Member** window will appear. Please see the next section on **Editing a Deal** for information on this window.

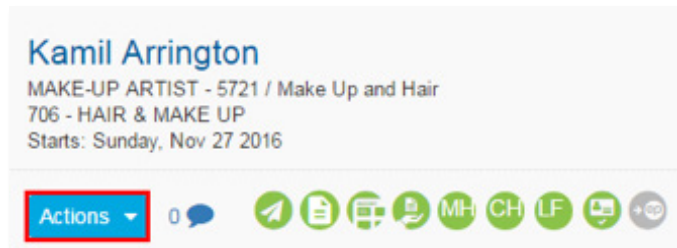
NOTE: While **SmartStart** will allow for adding notes to explain the denial, it is recommended that you be in constant contact with the other Approvers to ensure swift resolutions to any discrepancies.



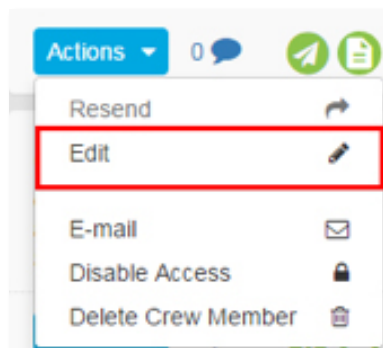
Editing a Deal

If you are the editor, usually the first or second Approver, you will have editing capabilities for a crew member's deal on the **Deals to Approve** page. Other Approvers/hiring managers can edit on the **Offers** tab. Editing can be performed during your first review, or if a deal is denied by a subsequent Approver who indicates valid changes need to be made. To edit a deal:

1. Click the **Actions** button for editing options.



Click the **Edit** link.



The **Edit Crew Member** screen will appear.

3. Make the change reflecting your reason for denying the deal. In this instance, a computer rental was added in error. Here it is being removed.

4. Click the **Preview Update** button.



The **Employment Offer Summary** window will appear, indicating the action will trigger an update to the crew member's paperwork and email the new offer to the crew member.

Employment Offer Summary - Kamil Arrington
×

UPM-EAST (WEEKLY)

On behalf of **Generic Studio** it is our pleasure to offer you the position of **UPM-EAST (WEEKLY)** on the production of **Summer Blockbuster**.

Your starting date will be **Friday, December 16, 2016**

The employment details below are what will appear on your deal memo. If any information is missing or incorrect, please contact before beginning your start packet.

Should you accept the job offer, beginning on your hire date you will be eligible to receive the following compensation:

- Union: **UPM & AD'S EAST COAST**
- Job: **UPM-EAST (WEEKLY) - 2800**
- Rate:
\$4794 Weekly Rate

Additionally, you will receive the following allowances:

- **Box Rental:** \$100 per


This change will trigger an update to this crew member's paperwork. We will email the new offer to the crew member after you select send.

BACK

SAVE

SAVE & SEND UPDATE

5. Click the **Save & Send Update** button.



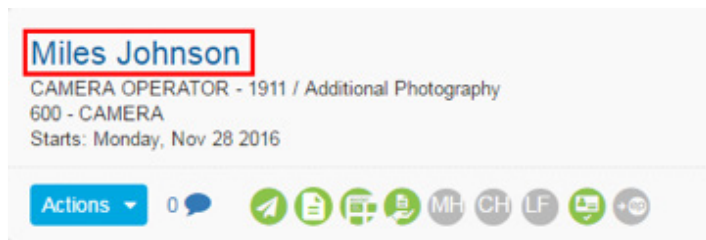
The crew member will then have the opportunity to approve the new deal. After you've edited a crew member's deal, their information will appear on the **Revised** tab.



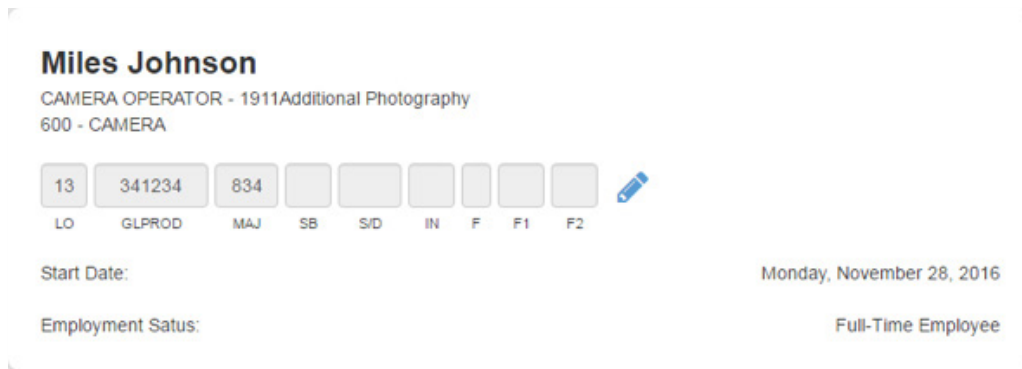
Editing the GL

It's important to note that editing a GL should take place outside of the **Edit Crew Member** screen. The GL information is not pertinent to the crew member, and therefore should only be edited from drilling down into the crew member's information in **SmartStart**. If a crew member's GL codes need to be entered, their status icon will appear in grey. To edit a crew member's GL:

1. Click on a crew member's name.



A summary of the crew member's deal will appear.



2. Click the **Edit Pencil** to edit the GL.





The GL grid will turn white and some or all of the fields will be available to edit.

13	341234	834								
LO	GLPROD	MAJ	SB	S/D	IN	F	F1	F2		

3. Edit the GL as needed.

13	341234	467								
LO	GLPROD	MAJ	SB	S/D	IN	F	F1	F2		

4. Once finished, click the **Diskette** icon to save.

13	341234	467								
LO	GLPROD	MAJ	SB	S/D	IN	F	F1	F2		



Entering and Reviewing Notes

While reviewing and approving or denying deals, Approvers have the ability to review and add notes to a crew member to help understand and communicate reasons denying or making changes to a deal, while keeping a record of communications. To enter notes for a crew member:

1. Next to the **Actions** button, click the **Talk Bubble** for comments.

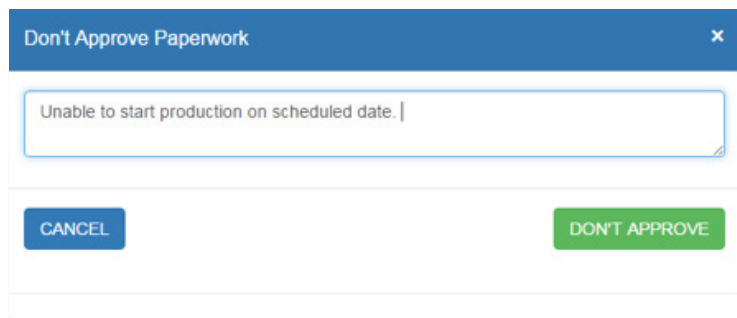


Or

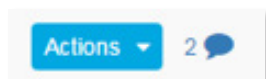
When clicking the **Deny** button, a screen will appear asking you to enter a note.

2. Enter a note explaining an action that was taken.

A record of notes for a given crew member will appear at the bottom of the **Notes** screen.



When viewing the **Deals to Approve** or **Revised Deals** tabs in **SmartStart**, the number of notes will be visible under a crew member's name. Keep on the lookout within this area to see any communications that might be logged by the various Approvers as part of their review process.



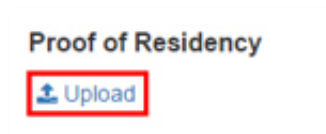
NOTE: Entering a note does not trigger any notification for the other Approvers. It is each Approver's responsibility to review the notes section to see if any important information has been added regarding a particular crew member. Only people in the approval chain can review the notes.



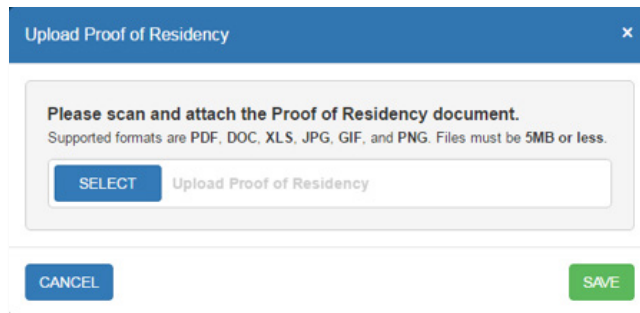
Uploading Documents

Throughout **SmartStart**, you may be prompted to upload supporting documentation for different pieces of information listed. Grey status icons will indicate a document has not been uploaded yet. To upload a document:

1. Locate an item in need of supporting documentation. Click the blue link beginning with the word **Upload**.



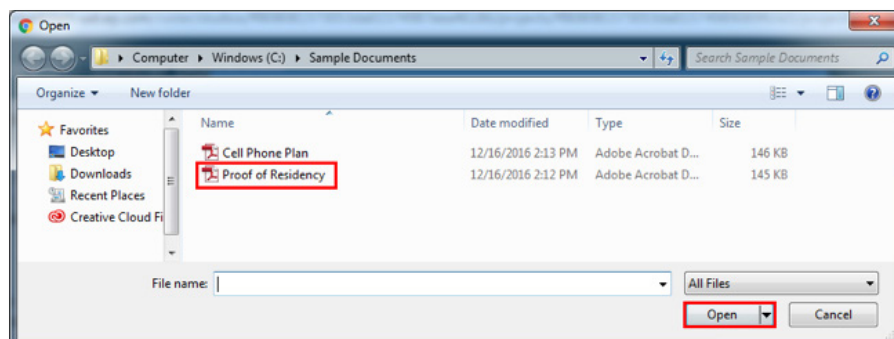
The **Upload** window will appear, listing the file type and size requirements for your file.



2. Click the **Select** button to upload cell allowance information.



3. Use your operating system's file explorer window to locate the necessary file. Once finished, click the **Open** button.





The selected file will appear in the **Upload** window.



4. Review the file name. If the file looks correct, click the **Save** button.



Or

If the file looks incorrect, click the **Replace** button.



Once finished, the file will then be listed for the designated entry in **SmartStart**.



5. If necessary, to remove a previously uploaded document, next to the document name, click the **Trash** icon.





Changing Notification Preferences

Since approval of a crew member's deal requires the coordination of all Approvers and is typically a time sensitive process, customizing your notification preferences to ensure you receive the updates you need, as they occur, can expedite your workflow. To change your notification preferences:

1. Click the **Cog** icon at the top of the page.



The **Email Notifications to** section will display the email address to which notifications will be sent. Since this address is the one associated with the **SmartStart** account, it cannot be changed.

Email notifications to:

 dway@mailinator.com

2. Click the checkboxes in the **I want to know when** column to determine the events that will trigger an email notification. These selections will vary based upon your responsibilities in the system.

Notification Settings

Email notifications to:

 moehoward@mailinator.com

I want to know when:	Notify me:
☒ A start packet is ready to view	When it occurs
☒ A start packet has been denied	When it occurs
☐ I-9s need to be verified	In a daily summary

CANCEL **SAVE**



3. If a particular event is selected, in the **Notify me** column, use the available drop-down menus to determine the frequency in which the notification will be delivered.

When it occurs
An email will be sent to you moment an event occurs

In a daily summary
An email (if any) will be summarized and sent each morning at 6 am EST

Both
You will be emailed when the event occurs and in a daily summary

4. Once all necessary selections have been made, click the **Save** button.



Frequently Asked Questions

Q: How can my production save time by avoiding back and forth edits?

A: If the Approvers closely monitor the **Offers** tab, they will be able to make quick corrections to a crew member's deal on the tab before it has been submitted by the crew. Therefore, time will not be lost sending the deal back and forth to make changes.

Q: I sent an crew member an offer – how will I know when it's been accepted?

A: Keep an eye on the **Offers** tab inside of the system. The **Offers** tab will show you all of the offers you have sent, and provide you with the option to invite a crew member again to **SmartStart**. Once a crew member is no longer on this list, they will have submitted their start paperwork.

Q: Which Approver has the ability to submit a deal to EP?

A: Typically the first or second Approver will have this additional permission. When the Approver hits the **Approve** button, the crew member's deal will automatically be sent to EP to process payroll. If an edit is made after it is submitted, when the Approver with the submit permissions re-approves, the most up-to-date deal is then sent to EP. **Green status icon** indicates submission has been completed.

Q: After editing a crew member's deal, what do I do if I need to make additional edits?

A: In the **Revised Deals** tab, you can use the edit function to continue making changes to a crew member's information up until they accept the revised deal. Once a crew member accepts a new deal, to make changes, you will have to resubmit the deal for approval.

Q: I noticed a crew member has been sitting in Revised Deals. What should I do?

A: A crew member's revised deal should not be listed in the **Revised Deals** section for very long. It is important to follow up with a given crew member to make sure they have noticed their revised deal and have the opportunity to provide approval.

Q: When denying a deal, why can't I edit the crew member's information?

A: If you are not provided with an additional screen to edit a crew member's information, you are not set up with editing capabilities and will need to discuss your suggested changes with the first Approver in the chain.

Q: If a later Approver has denied a deal, but we have since determined the deal is correct, what should happen next?

A: If a deal has come back to you after being denied, simply click to approve the deal again. This action will send the deal directly back to the Approver who initially denied the deal and give them the opportunity to provide approval.

Q: Why can I not see the Union or Job title of the person I am trying to hire?

A: **SmartStart** integrates with the industry leading EP Paymaster to make sure we are pulling the most updated scale rate for that job title. If a job title is missing, that means that the production is not signatory with the Union yet. Please contact **EP SmartStart Support** to check on this status and make sure we can add the desired union/job.



Frequently Asked Questions [cont.]

Q: Why do I not see Above-the-Line Unions?

A: *SmartStart* is currently only to be used with below-the-line crew members.

Q: For Allowances and Rentals, why am I only seeing certain options?

A: The Studio selects the production rules; therefore, you may see caps built in or certain allowances and rentals that do not match the screenshot in this guide.

Q: What is employment Status?

A: Employment Status designates that crew as either a loan-out or a crew member. If a crew member, you are required to pick how they will be chosen for ACA. This is typically mandated by the Studio.

Q: If a crew member already has a *Scenechronize* account, are they able to use the same username and password for *SmartStart*?

A: Yes, as long as the email address from the *Scenechronize* account is the same one used to hire them in *SmartStart*, the username and password will be the same.

Q: Once a crew member has been approved, can I go back and retract my approval?

A: Once an approval has been given the crew member's deal will be passed along to the next Approver in the chain. Coordinate with your production to see that any necessary corrections are made for a given crew member. If you are the editor, you may edit a given crew member from the **All** tab.