



# **Admin Guide: ASCENDER EmployeePortal Setup**



## Table of Contents

<b>Admin Guide: ASCENDER EmployeePortal Setup .....</b>	i
<b>Administrative Guide: ASCENDER EmployeePortal Setup .....</b>	1



# Administrative Guide: ASCENDER EmployeePortal Setup

ASCENDER EmployeePortal provides users with web access to various data inquiries and maintenance features.

EmployeePortal allows users to view their current and historical pay information including calendar year-to-date information, deductions, earnings, leave balances, W-2 information, and 1095 information. And, up to 18 months of check stub information; year-to-date leave earned, leave used, and leave balances (including any unprocessed transactions entered for future payrolls).

In addition, users can create, edit, delete, and submit leave requests. The EmployeePortal also provides a self-service maintenance page allowing users to submit changes to their demographic and payroll information such as changes to an address, withholding and exemption status, and direct deposit settings. Some changes may require additional approval or documentation.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).

## Before You Begin

Review the Getting Started document. The Getting Started document that is provided with each software release contains instructions about how the files must be configured and how to modify the properties for EmployeePortal.

Once your LEA has transitioned to ASCENDER, you can upload an LEA logo by using the [District Administration > Tables > District Logos](#).

EmployeePortal is driven by the settings previously defined by the LEA's administrators. These settings determine the level of access that users have in EmployeePortal.

This guide provides the necessary steps to set up the appropriate access to the portal and its various pages. These tasks are managed in the ASCENDER Business Payroll and Personnel applications.

## I. Set up EmployeePortal Options

1. [Set up district EP options](#).

## Payroll &gt; Tables &gt; District EP Options &gt; EmployeePortal Options

Use this page to manage your LEA-wide settings for ASCENDER EmployeePortal. These settings allow you to determine the information and features to which your employees have access in EmployeePortal.

The screenshot shows the 'EmployeePortal Options' page. At the top, there are tabs for 'EMPLOYEEPORTAL OPTIONS' and 'LEAVE CAMPUSES'. Below these are buttons for 'Retrieve' and 'Print'. A note says 'Use:  Employee Number  Social Security Number'. The main area is divided into sections: 'Enable' (checkboxes for various EmployeePortal features), 'Messages' (checkboxes for various payroll and leave messages), and several other groups of checkboxes for leave transactions, pay dates, URLs, and deposit accounts.

Field	Description
<b>EmployeePortal System</b>	Select to enable EmployeePortal.
<b>Calendar Year to Date</b>	Select to allow the Calendar Year to Date page to be displayed.
<b>Current Pay Information</b>	Select to allow the Current Pay Information page to be displayed.
<b>Deductions</b>	Select to allow the Deductions page to be displayed.
<b>Earnings</b>	Select to allow the Earnings page to be displayed.
<b>Leave Balances</b>	Select to allow the Leave Balances page to be displayed.

Under **Enable**, select the information or features to enable for your users in EmployeePortal.

Field	Description
<b>EmployeePortal System</b>	Select to enable EmployeePortal.
<b>Calendar Year to Date</b>	Select to allow the Calendar Year to Date page to be displayed.
<b>Current Pay Information</b>	Select to allow the Current Pay Information page to be displayed.
<b>Deductions</b>	Select to allow the Deductions page to be displayed.
<b>Earnings</b>	Select to allow the Earnings page to be displayed.
<b>Leave Balances</b>	Select to allow the Leave Balances page to be displayed.

Field	Description
<b>W-2 Information</b>	Select to allow the W-2 Information page to be displayed.
<b>Self-Service Demographic</b>	Select to allow the Self-Service Assignments - Demographic page to be displayed. If selected, use the <a href="#">Personnel &gt; Tables &gt; EP Self-Service Assignments Demographic</a> page to indicate which fields can be updated or viewed on the EmployeePortal Self-Service Profile page.  <b>Note:</b> If LEAs choose to allow users to change their passwords via the Self-Service menu in EmployeePortal, the <b>Self-Service Demographic</b> and/or <b>Payroll</b> fields must be selected. If both of these fields are blank, users will not be able to access the Self-Service menu in portal and therefore cannot change their passwords.
<b>Self-Service Payroll</b>	Select to allow the Self-Service Assignments - Payroll page to be displayed.  <b>Note:</b> If LEAs choose to allow users to change their passwords via the Self-Service menu in EmployeePortal, the <b>Self-Service Demographic</b> and/or <b>Payroll</b> fields must be selected. If both of these fields are blank, users will not be able to access the Self-Service menu in portal and therefore cannot change their passwords.
<b>W-2 Electronic Consent</b>	Select to allow the <b>W-2 Consent</b> button to be displayed. If not selected, W-2 forms are printed for all employees. <b>Note:</b> If W-2 Information is selected giving the employee access to the EmployeePortal > Inquiry > W-2 Information page, the <b>W-2 Consent</b> button is displayed and enabled on the W-2 Information page whether or not <b>W-2 Electronic Consent</b> is selected.
<b>1095 Information</b>	Select to allow the 1095 Information page to be displayed.
<b>1095 Electronic Consent</b>	Select to allow the <b>1095 Consent</b> button to be displayed. If not selected, 1095 forms are printed and mailed to all employees. <b>Note:</b> If <b>1095 Information</b> is selected giving the employee access to the EmployeePortal > Inquiry > 1095 Information page, the <b>1095 Consent</b> button is displayed and enabled on the 1095 Information page whether or not <b>1095 Electronic Consent</b> is selected.
<b>Leave Request</b>	Select to enable the Leave Request feature.
<b>Travel Reimbursement Request</b>	Select to enable the Travel Reimbursement Request feature.
<b>WorkJournal</b>	Select to enable the WorkJournal feature.

Under **Messages**, you can select one or more of the following pages to display a custom LEA-wide message on the page in EmployeePortal. All users who log on to EmployeePortal and access the page will see the message.

When a field is selected, a text box is displayed allowing you to add, delete, or modify a message. The message can be a maximum of 500 characters and is displayed in red at the top of the page in EmployeePortal.

<b>Calendar Year to Date</b>
<b>Current Pay Information</b>

<b>Deductions</b>
<b>Earnings</b>
<b>Leave Balances</b>
<b>W-2 Information</b>
<b>Self-Service Demographic</b>
<b>Self-Service Payroll</b>
<b>W-2 Electronic Consent</b>
<b>1095 Information</b>
<b>1095 Electronic Consent</b>
<b>Leave Request</b>
<b>Travel Reimbursement Request</b>
<b>WorkJournal</b>

<b>Show Processed Leave Transactions</b>	Select to allow users to view processed leave on the Leave Balances page.
<b>Show Unprocessed Leave Transactions</b>	Select to allow users to view unprocessed leave on the Leave Balances page.
<b>Number of Days Prior to Pay Date That Earnings Are Viewable</b>	<p>Type a three-digit maximum number to indicate the number of days prior to a pay date to display the earnings information on the Earnings page in EmployeePortal. By default, the field is set to 0.</p> <p>If the field is set to 0, the employee can view unlimited earnings information as soon as the earnings are posted.</p> <p><b>Example:</b> If the pay date is 10-31:</p> <p>Type 0 to allow employees to view earnings as soon as they are posted.</p> <p>Type 1 to allow employees to view earnings on 10-30.</p> <p>Type 2 to allow employees to view earnings on 10-29.</p> <p>Type 3 to allow employees to view earnings on 10-28.</p>
<b>W-2 Print - Latest Year</b>	<p>Type the four-digit year of the latest year for which the employees can print an official copy of their W-2.</p> <p>This field should not be updated until the LEA has run and finalized its W-2s.</p> <p>W-2s will be copies and will not be used in lieu of the LEA generating W-2s.</p> <p>W-2s will be printed in the official format (as determined by the IRS) and can be used as the original.</p> <p>The field contains the latest year available to print. If the field is left blank, employees will not have the option to print a copy of any of their W-2s. The earliest available form in the system is 2009 so an earlier year will not be accepted.</p>
<b>EmployeePortal URL</b>	Type the web address for your LEA's EmployeePortal site.
<b>Set Prenote Indicator</b>	Select to indicate if the account is a prenote account. This is for accounts added as a direct deposit in the EmployeePortal payroll information section.

<b>Number of Direct Deposit Accounts Are Allowed</b>	<p>Type a two-digit maximum number to indicate the number of direct deposit accounts allowed by the district. These accounts will be displayed in EmployeePortal. By default, the <b>Number of Direct Deposit Accounts Are Allowed</b> field is set to 0.</p> <p>If the <b>Number of Direct Deposit Accounts Are Allowed</b> field is set to 0, and the employee does not have any direct deposit accounts in Payroll, the employee will not be allowed to add one through EmployeePortal &gt; Self-Service.</p> <p>If the <b>Number of Direct Deposit Accounts Are Allowed</b> field is set to 0, and the employee has one or more direct deposit accounts in Payroll, the employee will not be allowed to add one through EmployeePortal &gt; Self-Service but will be able to modify and delete existing accounts.</p>
<b>Use PMIS for Supervisor Levels</b>	<p>Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request.</p>
<b>Force Entry of Leave Hours Requested</b>	<p>Select to force the employee to enter the number of requested leave hours. If selected, the number of requested leave hours is not automatically calculated.</p>
<b>Meal Break for Leave Calculation</b>	<p>Type the number of hours to be included in the hours per day calculation if a leave request exceeds five hours. An amount must be entered if a meal break is to be subtracted in the hours per day calculation. Valid values are 0.00-9.99.</p>

Click **Save**.

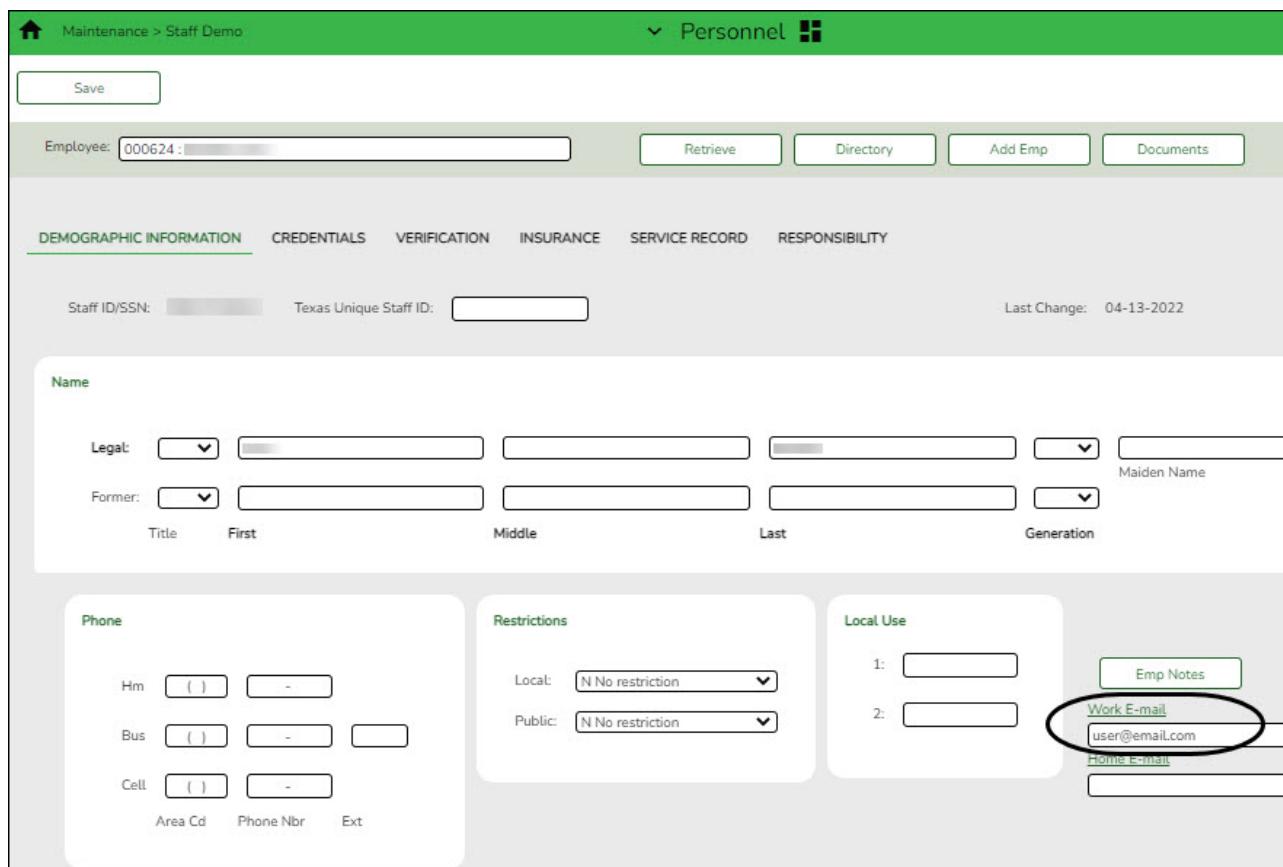
### III. Set up Supervisor Profiles

Before an employee can be set up as a supervisor, approver, or temporary approver, the employee must have a security user profile.

1. Create a demographic record.

[Personnel > Maintenance > Staff Demo > Demographic Information](#)

- Create an employee record. The record cannot be a non-employee record created in District Administration.
- Add an email address to the employee record to allow the supervisor or temporary approver to receive automatic reply and workflow emails.



Employee: 000624

Staff ID/SSN: [REDACTED] Texas Unique Staff ID: [REDACTED] Last Change: 04-13-2022

**Name**

Legal: [REDACTED] Former: [REDACTED] Maiden Name

Title: [REDACTED] First: [REDACTED] Middle: [REDACTED] Last: [REDACTED] Generation: [REDACTED]

**Phone**

Hm: ( [REDACTED] ) - [REDACTED] Bus: ( [REDACTED] ) - [REDACTED] Cell: ( [REDACTED] ) - [REDACTED]

Area Cd: [REDACTED] Phone Nbr: [REDACTED] Ext: [REDACTED]

**Restrictions**

Local: N No restriction Public: N No restriction

**Local Use**

1: [REDACTED] 2: [REDACTED]

Emp Notes: [REDACTED]

Work E-mail: user@email.com (circled)  
Home E-mail: [REDACTED]

## 2. Create a security profile.

### Security Administration > Manage Users

Update the user's profile with the employee number that was generated on the employee's Personnel demographic record.



Last Name: [REDACTED] First Name: [REDACTED] Middle Initial: [REDACTED] User ID: [REDACTED] Profile Name: LISA Employee Nbr: 000624 (circled)

If the employee has an existing user profile, ensure that the profile is active (i.e., not marked as deleted in Security Administration).

## IV. Set up the Leave Request Feature

Perform the following tasks to ensure that the leave request feature in EmployeePortal is properly set up and functions as intended for employee and supervisor users.

## 1. Set up district EP options.

Payroll > Tables > District EP Options > EmployeePortal Options

Tables > District EP Options

Payroll

EMPLOYEEPORTAL OPTIONS

LEAVE CAMPUSES

Save

Year: C

Frequency: 6

Retrieve

Print

Use:  Employee Number  Social Security Number

**Enable**

- EmployeePortal System
- Calendar Year to Date
- Current Pay Information
- Deductions
- Earnings
- Leave Balances
- W-2 Information
- Self-Service Demographic
- Self-Service Payroll
- W-2 Electronic Consent
- 1095 Information
- 1095 Electronic Consent
- Leave Request
- Travel Reimbursement Request
- WorkJournal

**Messages**

- EmployeePortal System
- Calendar Year To Date
- Current Pay Information
- Deductions
- Earnings
- Leave Balances
- W-2 Information
- Self-Service Demographic
- Self-Service Payroll
- W-2 Electronic Consent
- 1095 Information
- 1095 Electronic Consent
- Leave Request
- Travel Reimbursement Request
- WorkJournal

This is a leave request message for all employees.

- Under **Enable**, select **Leave Request** to enable the leave request feature in EmployeePortal.
- Under **Messages**, select **Leave Request** to enable employees to view a preset message on the Leave Requests page in EmployeePortal.

- Type the applicable message in the text box.
- The message is displayed in red at the top of the Leave Requests page in EmployeePortal.

Leave Requests

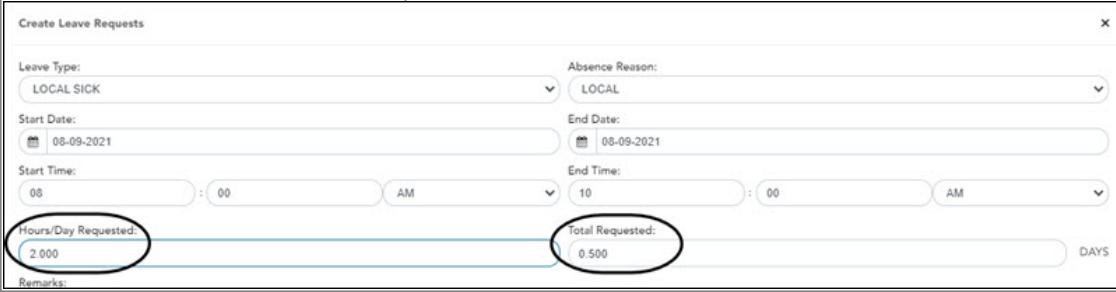
This is a leave request message for all employees.

Payroll Frequency:

Type:  From:  mm-dd-yyyy

Unprocessed Leave Requests

Start Date	End Date	Start Time	End Time	Leave Type	Absence Reason
No Results Found					

<b>Use PMIS for Supervisor Levels</b>	<p>(Optional if using PMIS) Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request.</p> <p>If this field is selected, you do not need to complete the Payroll &gt; Tables &gt; EmployeePortal Supervisors &gt; Employee/Supervisor page.</p>
<b>Force Entry of Leave Hours Requested</b>	<p>Select to require the employee to enter the number of requested leave hours when submitting a leave request.</p> <p>If selected, the number of leave hours requested is not automatically calculated.</p>
	 <p>If not selected, the number of leave hours requested is automatically calculated based on the start and end time of the leave request.</p> 

Click **Save**.

Review the [Leave Requests](#) Help page for further information about how the **Total Requested** column is calculated.

## 2. Set the standard work day.

[Payroll > Tables > District HR Options](#)

In the **Standard Hours per Workday** field, type the standard number of hours that the LEA requires hourly employees to work.

Tables > District HR Options

Save

**HR OPTIONS**

Retrieve Print

TRS District ID:  
Federal ID Number (EIN):  
Payroll Clearing Fund/Year:  
TWC District ID:  
Use Direct Deposit (Y,N, or E):  
TRS Cost Education Index:  
Distributions Built By Amt or %:  
Apply Leave Used or Earned First:  
Leave Code for State Sick:  
Leave Code for State Personal:  
Update Actual Hours From Payroll Processing

Calculate Accrual Salaries:  
Check Amount - Alpha:  
Summarize Benefits Interface:  
Supplemental Tax Rate:  
Standard Hours per Workday: **8.0**

Max Gross Amt for District:  
Auto Assign Employee Number:  
Next Available Employee Number  
School Year for PEIMS Codes:  
Use Emp Nbr or SSN in EFT File:  
Set Demo Alpha Fields to Uppercase:

3. Define the units of hours or days to be used when calculating leave requests.

Payroll > Tables > Leave > Units

If the **Days/Hrs** field is set to *Days* on the Tables > Leave > Leave Type tab for the selected leave type, add units for hours.

Tables > Leave

Payroll

Save

Year: C Frequency: 6

ABSENCE REASON LEAVE TYPE DESCRIPTION LEAVE TYPE LEAVE RATES LEAVE SEQUENCE UNITS

Leave Type:  Retrieve Print Copy

Start Up to Hour:  0.00

Delete	Up to Hour	Percent of Day
	1.00	13 %
	2.00	26 %
	3.00	40 %
	4.00	53 %
	5.00	66 %
	6.00	80 %
	8.00	100 %
	0.00	0 %

First < 1 > Last Add

If the **Days/Hrs** field is set to *Hours* for the selected leave type, add units for minutes.

Delete	Up to Minute	Percent of Hour
5	8%	
10	16%	
15	25%	
20	33%	
25	42%	
30	50%	
35	58%	
40	67%	
50	83%	
55	92%	
60	100%	
0	0%	

 The modal also includes navigation buttons: First, Previous, Next, Last, and Add.
 " data-bbox="125 195 385 500"/>

Tables > Leave

Payroll

Save

Year: C Frequency: 6

ABSENCE REASON LEAVE TYPE DESCRIPTION LEAVE TYPE LEAVE RATES LEAVE SEQUENCE UNITS

Leave Type:  Retrieve Print Copy

Start Up to Minute:  0

4. [Assign leave types and balances for each applicable pay frequency.](#)

[Payroll > Maintenance > Staff Job/Pay Data > Leave Balance](#)

You can assign multiple leave types to employees in the pay frequency to which you are logged on.

**Note:** If the employee has leave balance data in multiple frequencies, the employee can select the pay frequency from the **Pay Frequency** drop down on the Leave Requests page in EmployeePortal.

Employee: 000624

Year: C Frequency: 6

Retrieves, Directory, Add

Leave Type	Begin	Earned	Used	Balance
02 - LCL PRSL	24.000	7.500	0.000	31.500
04 - VACATION	60.000	3.000	0.000	63.000

## 5. Manage leave pay campuses.

The employee's pay campus must exist on the Payroll > Tables > District EP Options > Leave Campuses tab to allow the employee to access the Leave Requests page in EmployeePortal.

### Payroll > Maintenance > Staff Job/Pay Data > Pay Info

- Obtain the employee pay campus data.
- Optional:* Obtain the **Pay Dept** if applicable.

Employee: 000624

Year: C Frequency: 6

Retrieves, Directory, Add

Pay Status: 1 Active	Tax Exempt: <input type="checkbox"/>
Pay Campus: 750 750 School	Unemployment Elig: <input checked="" type="checkbox"/>
Pay Dept: <input type="checkbox"/>	FICA Eligibility: M Subject to medicare
Dock Rate: 0.000	W4 Marital Status: Single
Nbr of Exemptions: 0	

**W-4 Withholding Certificate**

- 1: Filing Status:  Sing
- 2: Multi-Jobs:
- 3: Children under 17:
- 3: Other Dependents:
- 3: Other Exemptions:
- 4a: Other Income:
- 4b: Other Deductions:

### Payroll > Tables > District EP Options > Leave Campuses

- Each pay campus and department with assigned employees must be added to this tab in order to use the EmployeePortal leave request feature.
- Optional:* If a **Pay Dept** is assigned to the employee on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab, then it must be assigned on the Leave Campuses tab.

Tables > District EP Options Payroll

EMPLOYEEPORTAL OPTIONS LEAVE CAMPUSES

Start Campus ID:  Retrieve Print

Delete	Campus ID	Campus Name	Department
	001	001 School	<input type="checkbox"/>
	042	042 School	<input type="checkbox"/>
	750	750 School	<input type="checkbox"/>
			<input type="checkbox"/>

First ◀ 1 / 1 ▶ Last  [Add](#)

## 6. Designate the employee/direct supervisor relationship.

This setting serves two purposes, it determines the leave request approval path for the employee and allows the supervisor to access the Supervisor menu in EmployeePortal.

[Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor](#)

Tables > EmployeePortal Supervisors Payroll

EMPLOYEE/SUPERVISOR

Start Employee Name:  Retrieve Print Upload File

Supervisor Name:

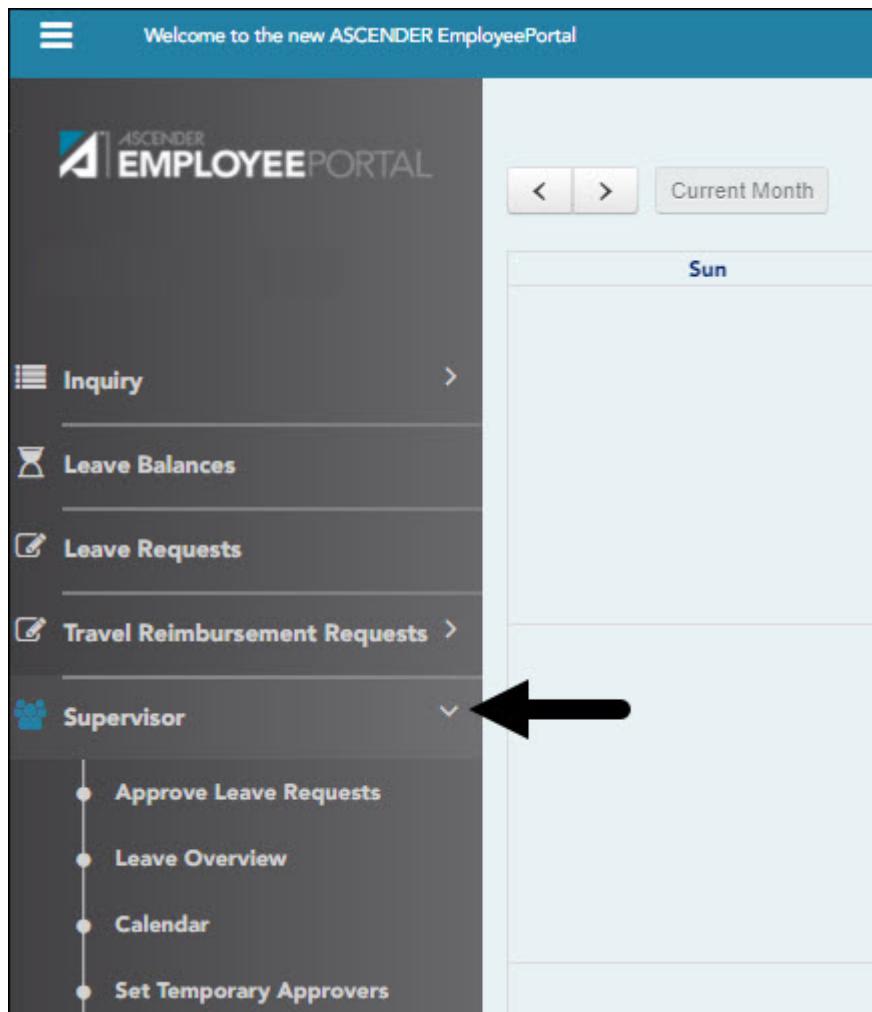
Delete	Employee Number	Last Name	Gen	First Name	Middle Name	Supervisor Number	Last Name	Gen	First Name	Middle Name	User ID
	000624	PRESLEY	S	ELVIS		000618	TESTUSER				
											

First ◀ 1 / 1 ▶ Last  [Add](#)

### Notes:

- This page does not need to be populated if **Use PMIS for Supervisor Levels** is selected on the Payroll > Tables > District EP Options > EmployeePortal Options tab.
- An employee must have a designated supervisor prior to submitting leave requests in EmployeePortal.

A supervisor must have at least one assigned employee on the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor tab in order to access the Supervisor menu in EmployeePortal.



Refer to the [Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers](#) for more information about setting up temporary approvers and performing supervisor-level tasks.

After the above steps are completed, users can submit leave requests in EmployeePortal.

## V. Set up Self Service Options

- Use the EP Self-Service Assignments pages to manage the demographic and payroll fields that the user can view and update in EmployeePortal.
  - [Personnel > Tables > EP Self-Service Assignments Demographic](#)
  - [Payroll > Tables > EP Self-Service Assignments Payroll](#)
- Use the following pages to view and approve pending maintenance requests that were submitted by users in EmployeePortal.

**Payroll:**

- Payroll > Self-Service > Pending
- Payroll > Self-Service > Payroll Approval
- Payroll > Self-Service > Pending by Alternate
- Payroll > Self-Service > Payroll Approval by Alternate

**Personnel:**

- Personnel > Self-Service > Pending
- Personnel > Self-Service > Pending by Alternate
- Personnel > Self-Service > Demographic Approval
- Personnel > Self-Service > Demographic Approval by Alternate

If a user is locked out of their account, delete their EmployeePortal account and advise them to create a new account using the **New User** button on the EmployeePortal login page.

- Personnel > Self-Service > Delete EP Users

The following Self Service Reports are available:

- Payroll > Reports > Self-Service Reports > HRS8000 - Self-Service Requests
- Payroll > Reports > Self-Service Reports > HRS8005 - Leave Request Report
- Payroll > Reports > Self-Service Reports > HRS8015 - Leave Request Comparison Report
- Personnel > Reports > Self-Service Reports > Self-Service Requests

---

## ASCENDER EmployeePortal Guides

Refer to the [Employee Guide: Login, Data Inquiries, Self Service & Leave Requests](#) for more information about using EmployeePortal.

If you are a supervisor, refer to the [Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers](#) for more information about using EmployeePortal to perform supervisor-level tasks.