

Admin Guide: Leave Requests Setup

Table of Contents

Set up Supervisor and Temporary Approver Profiles	1
Set up Payroll Options	2
Enable the Leave Request Feature	8

Admin Guide: ASCENDER EmployeePortal Leave Requests Setup

The purpose of this document is to guide you through the necessary steps of setting up Security Administration and Payroll in order to take complete advantage of the benefits associated with using the leave request feature in EmployeePortal.

Some of the images and examples provided in this document are for informational purposes and may not completely represent your LEA's process.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Set up Supervisor and Temporary Approver 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

 \Box 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.

A Maintenance > Staff Demo	👻 Personnel 👪	
Save		
Employee: 000624 :	Retrieve Directory Add Emp	Documents
DEMOGRAPHIC INFORMATION CREDENTIALS	ERIFICATION INSURANCE SERVICE RECORD RESPONSIBILITY	
Staff ID/SSN: Texas Unique St	f ID: Last C	hange: 04-13-2022
Name		
Legal: 💙		Maidan Nama
Former:		Maldel Malle
Title First	Middle Last Ger	neration
Phone	Restrictions Local Use	
Hm () -	Local: N No restriction	Emp Notes
Bus () -	Public: N No restriction 2:	User@email.com
Cell () -		
Area Cd Phone Nbr Ext		

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.

★ Edit User	🗸 Security Administration 🚦						
Save Last Name:	First Name:	Middle Initial:	User ID:	Profile Name LISA	Employee Nbr: 000624		

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

Set up Payroll Options

If you have not already, 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 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	
OPTIONS	
Retrieve Print	
TRS District ID:	Calculate Accrual Salaries:
Federal ID Number (EIN):	Check Amount - Alpha:
Payroll Clearing Fund/Year:	Summarize Benefits Interface:
TWC District ID:	Supplemental Tax Rate:
Use Direct Deposit (Y,N, or E):	Standard Hours per Workday: 8.0
TRS Cost Education Index:	Max Gross Amt for District:
Distributions Built By Amt or %:	Auto Assign Employee Number:
Apply Leave Used or Earned First:	Next Available Employee Number
Leave Code for State Sick:	School Year for PEIMS Codes:
Leave Code for State Personal:	Use Emp Nbr or SSN in EET File:
Update Actual Hours From Payroll Processing	Set Demo Alpha Fields to Uppercase:

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

Payroll > Tables > Leave > Units

 \Box 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	Сору		
Start Up to Hour: 0.00					
)				
Delete Up to Hour Percent of Day					
1.00 13 %					
<u> </u>					
3.00 40 %					
± 4.00 53 %					
1 5.00 66 %					
6.00 80 %					
8.00 100 %					
m 0.00 0%					
First (1 V / 1) Last (Add	J				

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

Tables > Leave	ables > Leave Payroll					
Save			Year: C	Frequency: 6		
ABSENCE REASON LEAVE TYPE DESCRIPT	IN LEAVE TYPE LEAVE RATES LEAVE SEQUE					
Leave Type:	Retrieve Print	Сору				
Start Up to Minute:						
Delete Up to Minute Percent of Ho	r					
5 8	6					
10 16	6					
15 25	%					
20 33	6					
25 42	%					
<u> </u>	6					
35 58	6					
	Ma					
	K6					
55 92	Ma					
60 100	6					
	*					
First (1 V/1) Last (+ /						

3. 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.

A Mainter	ance > Staff Job/Pay Data	~	Payroll 📲			
Save				Year: C		Frequency: 6
Employee:	000624:			Retrieve	Direc	tory
PAY INFO	JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALAN	NCE				
Delete	Leave Type	Be	g <u>in Earned</u>	Used	Balance	
1	02 - LCL PRSL	: 24.00	0 7.500	0.000	31.500	
Û	04 - VACATION	: 60.00	0 3.000	0.000	63.000	

4. 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

- $\circ\,$ Obtain the employee pay campus data.
- *Optional*: Obtain the **Pay Dept** if applicable.

Maintenance > Staff Job/Pay Data		👻 Payroll 🚦		
Save			Year: C	Frequency: 6
Employee: 000624 :			Retrieve	Directory
PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS	LEAVE BALANCE			
Pay Status: 1 Active	Tax Exempt: Unemployment Elig: FICA Eligibility: W4 Marital Status: Nbr of Exemptions:	M Subject to medicare Single	v]	W-4 Withholding Certificate 1: Filing Status: 5 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 🚦		
Save				Year: C	Frequency: 6
EMPLOYEEPORTAL OPTIONS LEA	VE CAMPUSES				
Start Campus ID:		Retrie	eve Print		
)	
Delete	Campus ID	Campus Name	Department		
1	001	001 School			
1	042	042 School			
	750	750 School			
1					
	200				
First () 1 V/1 > Las	st		+ Add		

5. 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 🚦		
Save		Year: C	Frequency: 6
EMPLOYEE/SUPERVISOR			
Start Employee Name:	Retrieve Print	Upload File	
Delete Employee Number Last Name Gen First Name Middle Name (000624) (00062	000618 PRESLEY	First Name Middle Name	TESTUSER
First (1) 1 V /1 () Last			⊕ <u>Add</u>

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.

Welcome to the new ASCENDER Em	nployeePortal
	< > Current Month
	Sun
Inquiry >	
Eeave Balances	
C Leave Requests	
Travel Reimbursement Requests >	
👹 Supervisor 🛛 👻	←
Approve Leave Requests	
Leave Overview	
Calendar	
Set Temporary Approvers	

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.

Enable the Leave Request Feature

1. Set up district EP options.

Payroll > Tables > District EP Options > EmployeePortal Options

Tables > District EP Options		🗸 Payroll 📲		
Save			Year: C	Frequency: 6
IPLOYEEPORTAL OPTIONS LEAVE CA	MPUSES			
Ratriava Print				
se: () Employee Number 🔿 Social S	ecurity Number			
0				
	Messages	•		
Enable	C EmployeePortal System	This is a leave request message for a	ll employees	
FmployeePortal System	O Calendar Year To Date	This is a corrected of the stage for a	a emptoyees.	
🖌 Calendar Year to Date	O Current Pay Information			
Current Pay Information	O Deductions			
Deductions	O Earnings			
✓ Leave Balances	O Leave Balances			
✓ W-2 Information	O W-2 Information			
Self-Service Demographic	O Self-Service Demographic			
✓ Self-Service Payroll	O Self-Service Payroll			
W-2 Electronic Consent	O W-2 Electronic Consent			
✓ 1095 Information	O 1095 Information			
V 1095 Electronic Consent	O 1095 Electronic Consent			
✓ Travel Reimbursement Request	Leave Request			
✓ WorkJournal	O Travel Reimbursement Reque	est		
_	O WorkJournal			

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	5				
This is a leave request mess Payroll Frequency:	sage for all employees.	~		-	
туре:				From:	
			~	mm-dd-yyyy	
Unprocessed Leave Re	quests				
Start Date	End Date	Start Time	End Time	Leave Type	Absence Reason
No Results Found					

Use PMIS
for(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 numberSupervisor
From the employee's primary position to determine the appropriate approval path for the
employee's leave request.
If this field is selected, you do not need to complete the Payroll > Tables > EmployeePortal
Supervisors > Employee/Supervisor page.

auested			quested is not au	tomatically car	culacea.	
questeu	Create Leave Requests					^
	Leave Type:		Absence Reason:			
	LOCAL SICK		V LOCAL			~
	Start Date:		End Date:			
	08-09-2021		08-09-2021			
	Start Time:	A14	End Time:		V	
		AM	• 10		AM	
	Hours/Day Requested:		Total Requested:			(1 /
	If not selected, the nu start and end time of	Imber of leave hour the leave request.	rs requested is au	tomatically cal	culated based (on the
	If not selected, the nu start and end time of Create Leave Requests	Imber of leave hour the leave request.	rs requested is au	tomatically cal	culated based o	on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type:	Imber of leave hour the leave request.	rs requested is au	tomatically cal	culated based (on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK	Imber of leave hour the leave request.	Absence Reason:	tomatically cal	culated based o	on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date:	Imber of leave hour the leave request.	Absence Reason:	tomatically cal	culated based o	on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date: 10 06-09-2021	Imber of leave hour the leave request.	Absence Reason: LOCAL End Date: 08-09-2021	tomatically cal	culated based o	on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date: 10-09-2021 Start Time:	Imber of leave hour the leave request.	Absence Reason: LOCAL End Date: 08-09-2021 End Time:	tomatically cal	culated based o	on the
	If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date: 08-09-2021 Start Time: 08 : 00	Imber of leave hour the leave request.	Absence Reason: V LOCAL End Date: M 08-09-2021 End Time: V 10	tomatically cal	culated based o	on the
	0.000 If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date: 08 00 Hours/Day Requested	Imber of leave hour the leave request.	Absence Reason:	tomatically cal	culated based o	on the
	0.000 If not selected, the nu start and end time of Create Leave Requests Leave Type: LOCAL SICK Start Date: 08 00 1000 1000 2000	Imber of leave hour the leave request.	Absence Reason:	itomatically cal	culated based o	on the

Click **Save**.

Review the Leave Requests Help page for further information about how the **Total Requested** column is calculated.

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

Ensure that all employees are set up with a user name and password, and can log on to EmployeePortal. If not, review the Employee Guide: Create Account & Login for additional information about user setup.