Admin Guide: ASCENDER EmployeePortal Leave Requests Setup

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Admin Guide: Leave Requests Setup

This guide provides the necessary steps to set up Security Administration and Payroll in order to take complete advantage of the benefits associated with using the leave request feature in EmployeePortal.

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

Prerequisites

❑ 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 guide for additional information about user setup.

Set up Supervisor Profiles

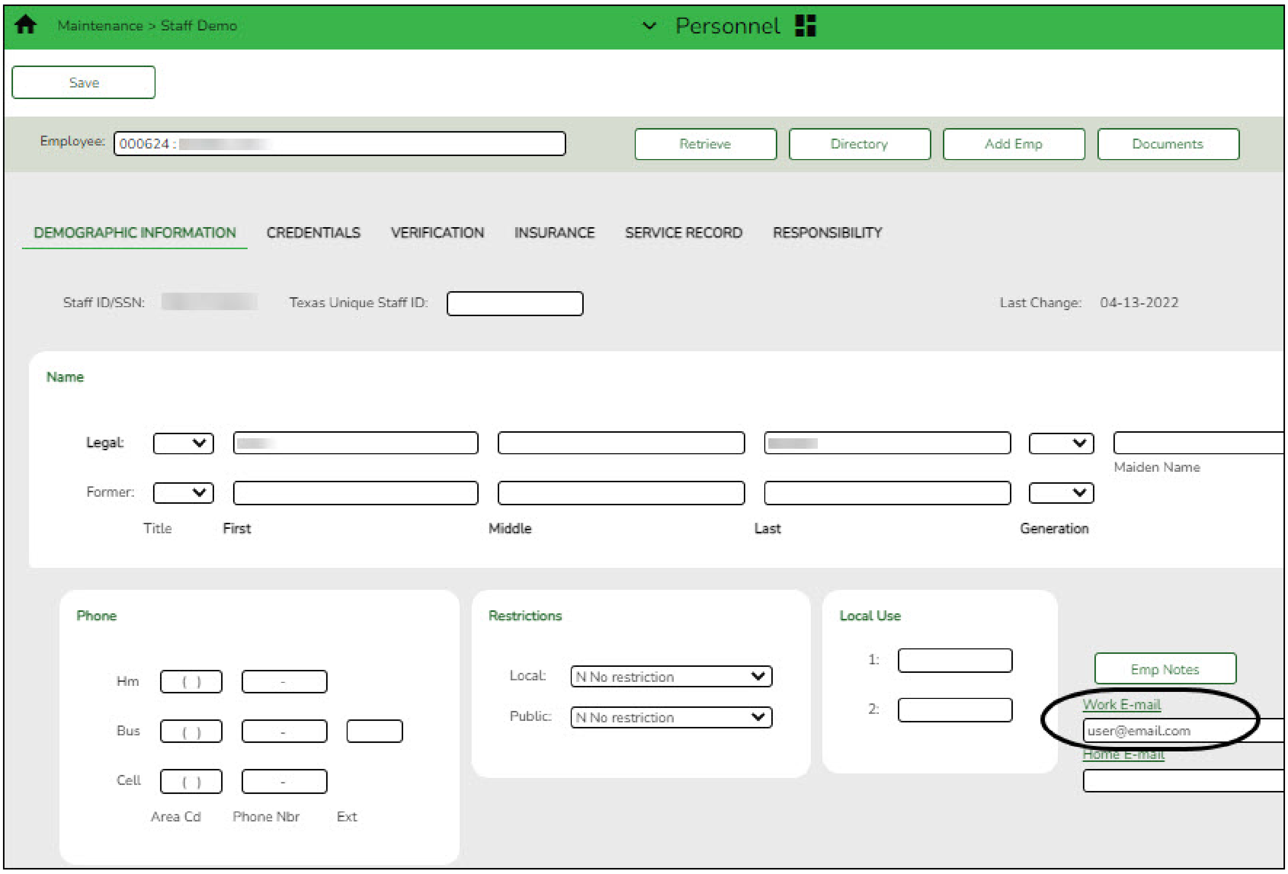
Before an employee can be set up as a supervisor, approver, or temporary approver, the employee must have a security user profile.

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.

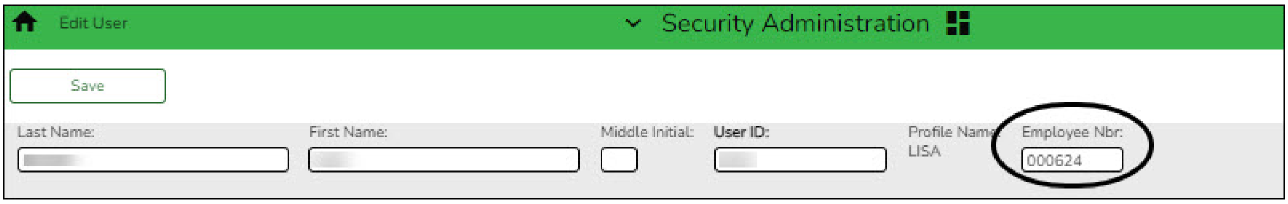
   ❑ Add an email address to the employee record to allow the supervisor or temporary approver to receive automatic reply and workflow emails.



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.

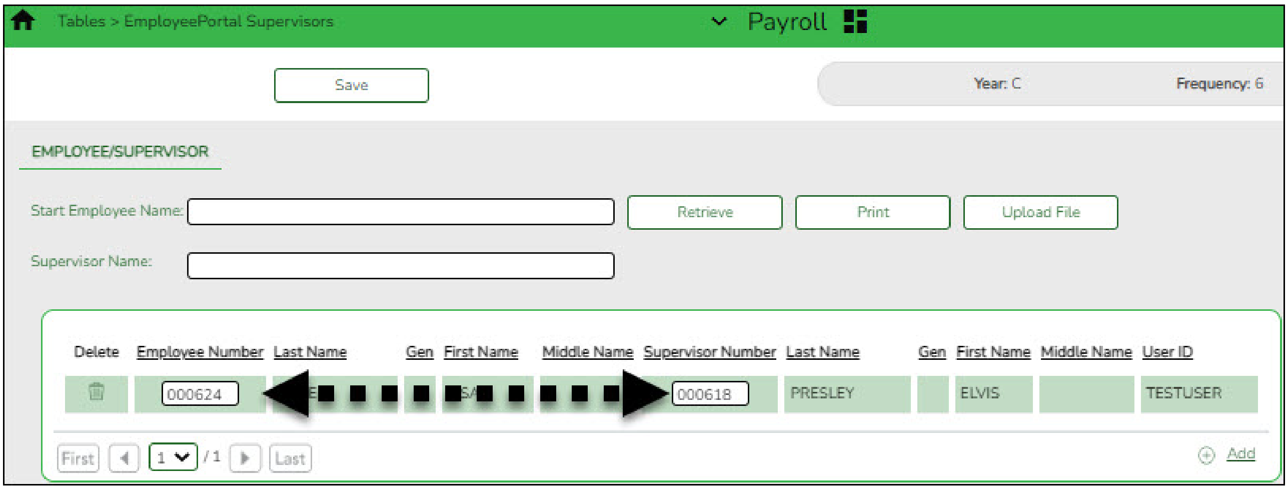


❑ If the employee has an existing user profile, ensure that the profile is active (i.e., not marked as deleted in Security Administration).

3. 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.

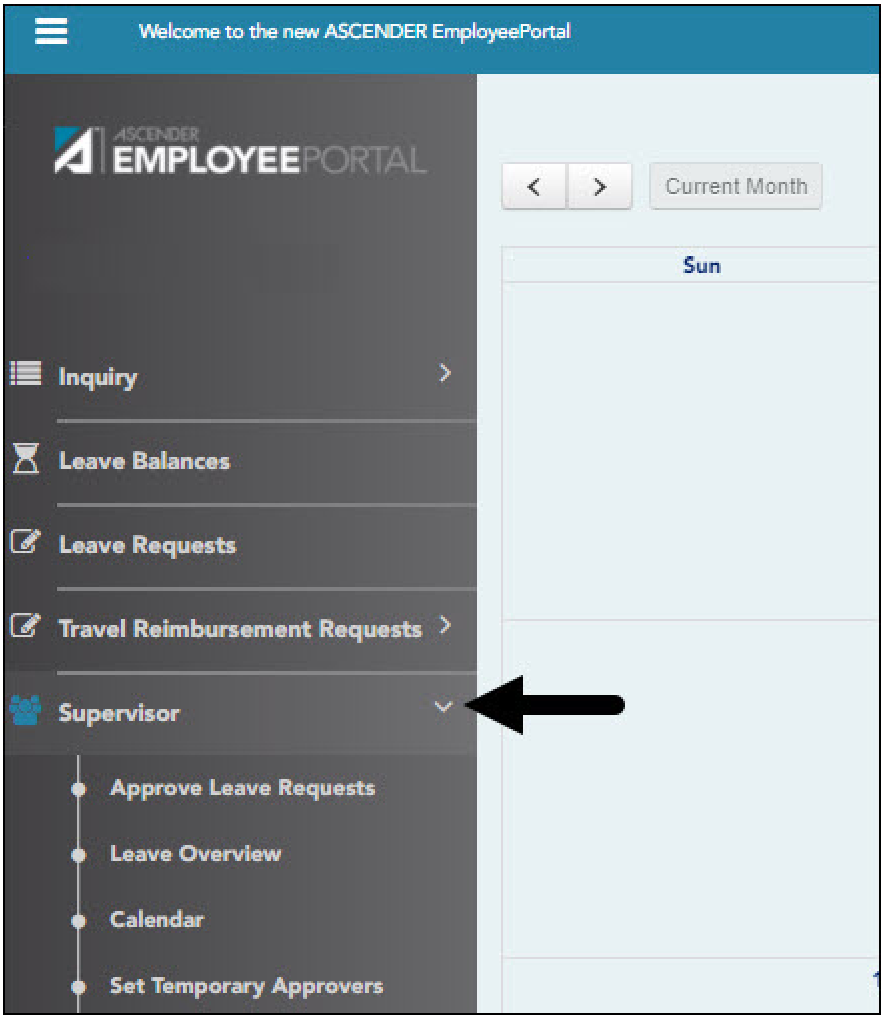
Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor



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.



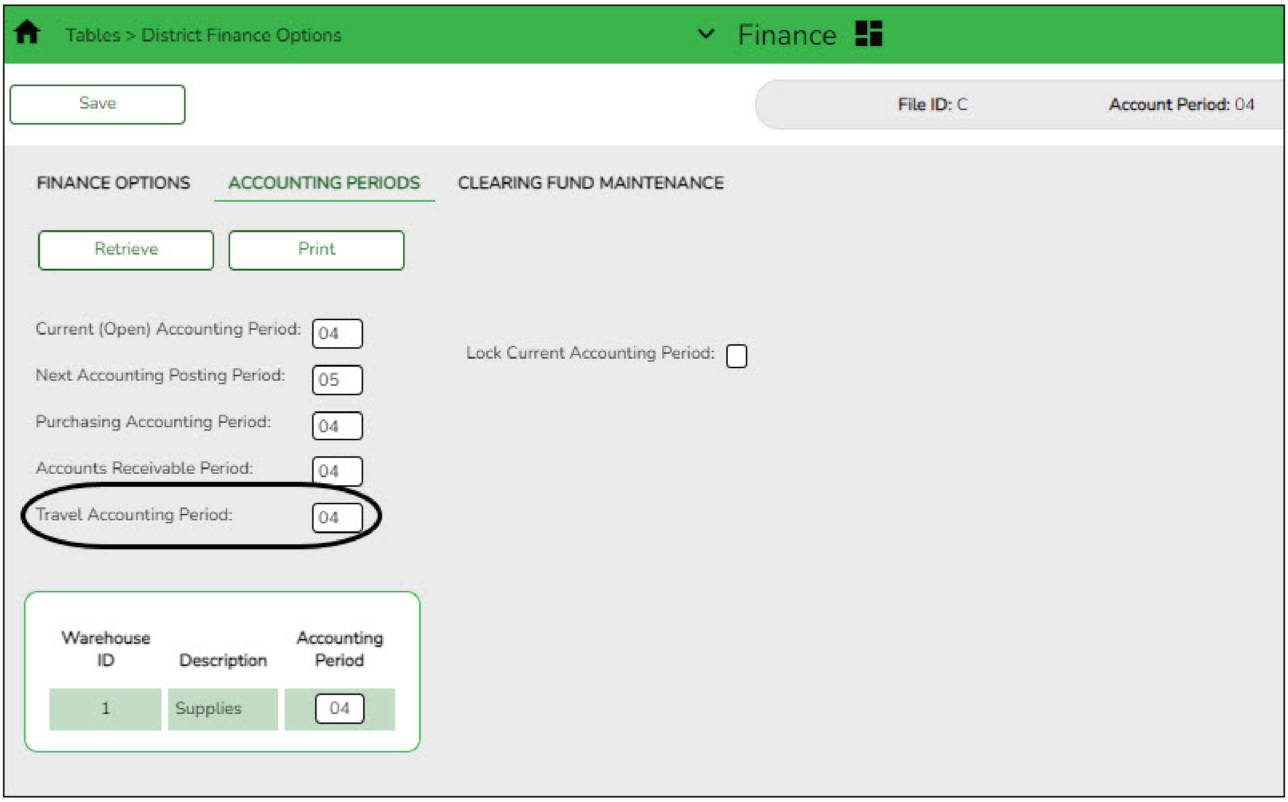
Refer to the Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers for more information about setting up temporary approvers and performing supervisor-level tasks.

Verify Travel Accounting Period

1. Verify travel accounting period.

   Finance > Tables > District Finance Options > Accounting Periods

   Verify that the travel accounting period is accurate.



Travel Accounting Period	Type the Travel accounting period. The field is a two-digit number from 01-12. The period can be the same as the current accounting period or the next accounting posting period.

Note: This accounting period is incremented after completing the EOM and Fiscal Year Close processes.

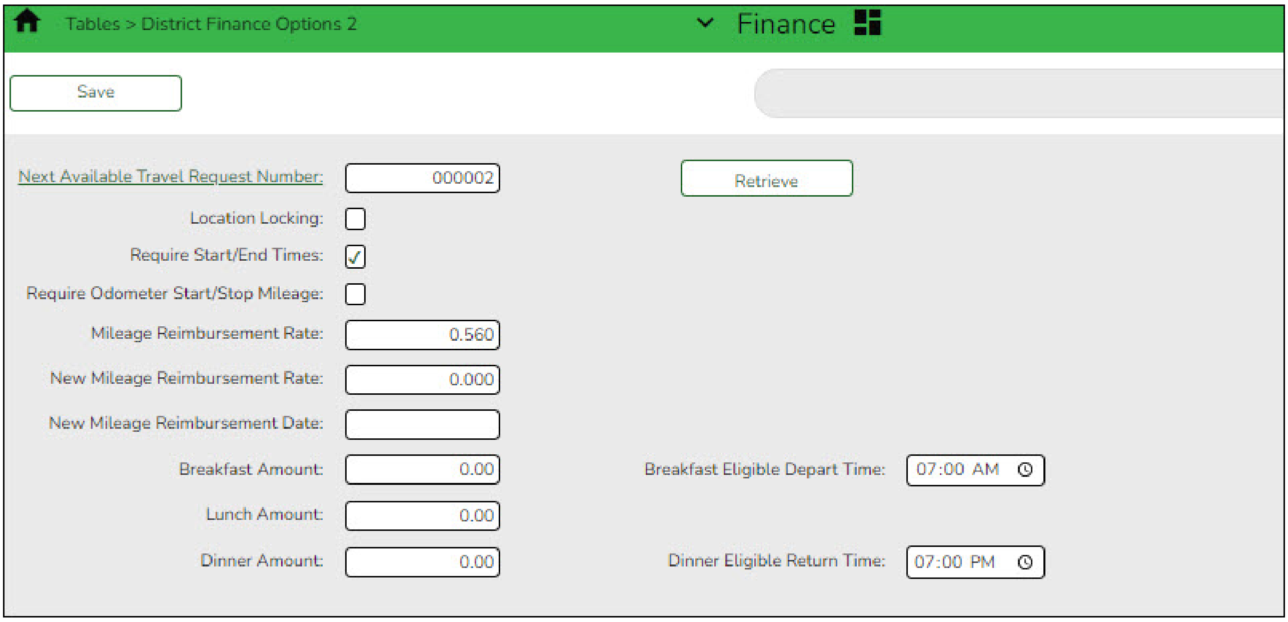
Set up Travel Options

Perform the following tasks to ensure that the travel reimbursement request feature in EmployeePortal is set up properly and functions as intended for employees.

1. Set up Finance 2 options.

   Finance > Tables > District Finance Options 2

   Set up the appropriate parameters to be used for the LEA's travel reimbursement requests.



Field	Description
Next Available Travel Request Number	Type the next available travel request number. Or, click the **Next Available Travel Request Number** link to automatically populate the field with the last travel request number plus one. The field can be a maximum of six characters and can be alphanumeric. If only numeric values are used, the field is zero-filled to equal six digits when a partial travel request number is entered and you tab out of the field (e.g., you entered 123, the field is zero-filled to 000123). If alphanumeric values are used, the field is not zero-filled to equal six characters (e.g., you entered ABC2, the travel request number remains ABC2).
Location Locking	Select to lock (disable) the **Mileage** (Start, Stop, and Map) fields, **Point of Origin**, and **Destination** fields on travel requests and require employees to use the **Location** link to select an origin and destination location from the predefined list of travel locations and distances set up on the Finance > Tables > Travel > Locations and Finance > Tables > Travel > Distances tab. The Location Locking feature is not available for extended mileage travel requests.
Require Start/End Times	Select to require the travel start and end times on travel requests. This option is only available for mileage travel requests. The start/end times are always required for extended travel as the times are necessary to determine meal rates and eligibility.
Require Odometer Start/Stop Mileage	Select to require the beginning and ending odometer readings on travel requests.
Mileage Reimbursement Rate	Type the mileage reimbursement rate (cents per mile).
New Mileage Reimbursement Rate	Type the new mileage reimbursement rate. This field is used when the mileage reimbursement rate is set to change on a scheduled date.

Field	Description
New Mileage Reimbursement Date	Type the date on which the **New Mileage Reimbursement Rate** takes effect. Use the MM-DD-YYYY format. This field is used when the mileage reimbursement rate is set to change on a scheduled date. When travel requests are entered in EmployeePortal, if the date the travel occurred is equal to or greater than this date, the new mileage reimbursement rate is used.
Breakfast Amount	Type the allowable limit for breakfast reimbursement.
Breakfast Eligible Depart Time	Type the time the employee must depart before in order to be reimbursed for breakfast on the first travel day. Use the HH MM format and click to select AM or PM. To be reimbursed for breakfast on the first travel day, the **Departure Time** on the travel request must be earlier than the **Breakfast Eligible Depart Time**.
Lunch Amount	Type the allowable limit for lunch reimbursement.
Dinner Amount	Type the allowable limit for dinner reimbursement.
Dinner Eligible Return Time	Type the time the employee must return after in order to be reimbursed for dinner on the last travel day. Use the HH MM format and click to select AM or PM. To be reimbursed for dinner on the last travel day, the **Return Time** on the travel request must be later than the **Dinner Eligible Return Time**.

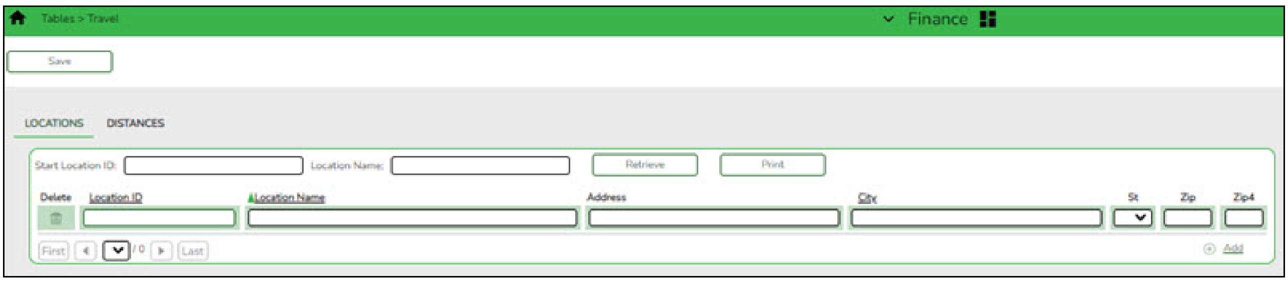
❑ Click **Save**.

2. Define travel locations.

   Finance > Tables > Travel > Locations

   Define a list of travel locations. These locations can be used on the Finance > Tables > Travel > Distances tab to predefine a list of distances between to/from travel locations. If the Location Locking feature is enabled on the Finance > Tables > District Finance Options 2 page, the **Mileage** (Start, Stop, and Map) fields, **Point of Origin**, and **Destination** fields are disabled on EmployeePortal travel requests and employees will need to use the Locations link to select from the predefined list of locations.

   This is an optional method for maintaining a list of locations.



❑ Click **+Add** to add a row.

Location ID	Type a unique user-defined location ID. This field can be a maximum of twenty alphanumeric characters. This is a required field.
Location Name	Type a user-defined location name. This field can be a maximum of thirty-five alphanumeric characters. This is a required field.
Address	Type the street number and name for the location. This field can be a maximum of 35 characters.
City	Type the city name for the location. This field can be a maximum of 30 characters.
St	Click ⌄ to select the state for the location.
Zip	Type the five-digit zip code for the location.
Zip 4	Type the additional four digits of the zip code.

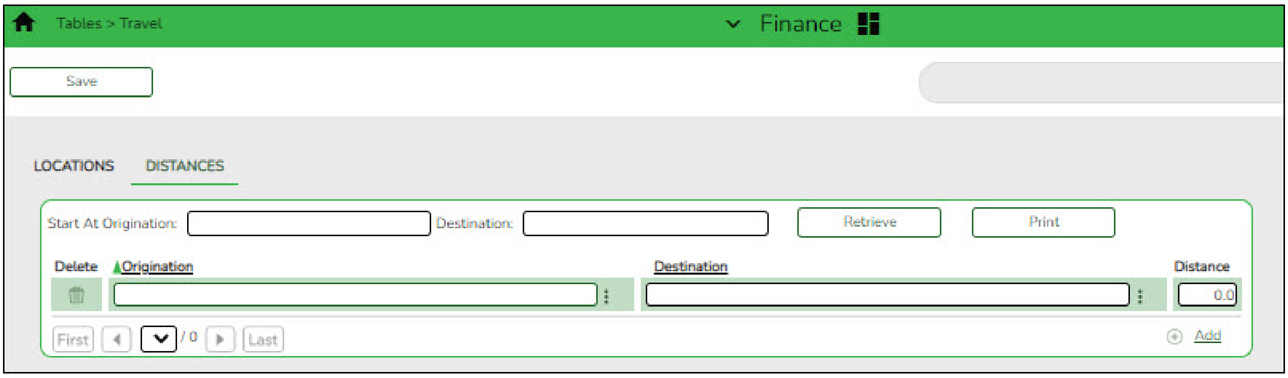
❑ Click **Save**.

3. Calculate to/from location distances.

Finance > Tables > Travel > Distances

Add a list of distances (in miles) between possible predefined to/from travel locations. These locations are set up on the can be used on the Finance > Tables > Travel > Locations tab. If the Location Locking feature is enabled on the Finance > Tables > District Finance Options 2 page, the **Mileage** (Start, Stop, and Map) fields, **Point of Origin**, and **Destination** fields are disabled on EmployeePortal travel requests and employees will need to use the Locations link to select from the predefined list of locations.

This is an optional method for maintaining a list of locations.



❑ Click **+Add** to add row.

Origination	Click ⋮ to open the Location lookup and select a starting location.
Destination	Click ⋮ to open the Location lookup and select an ending location.
Distance	Type the number of miles from the **Origination** (starting) location to the **Destination** (ending) location.

❑ Click **Save**.

Create and Link Employee/Vendor Records

1. Create an employee vendor record.

   Finance > Maintenance > Vendor Information > Vendor Name/Address

   Create a vendor record for the employee.

   ❏ Click **Add**.

   ❏ Complete the applicable fields.

   TIPS:

   - Under **EIN/SSN**, the **Type** must be *SSN* and the **Number** must match the employee's SSN on the Personnel > Maintenance > Staff Demo > Demographic Information tab. It is important that this information matches as this is the link between the employee's vendor and demographic record, and determines the availability of the copy bank information from payroll functionality on the Vendor Miscellaneous tab.
   - The **EFT Email** is required.

   ❏ Click **Save**.

2. Add bank information.

   Finance > Maintenance > Vendor Information > Vendor Miscellaneous

   Add bank information for the vendor/employee.

   ❏ Under **Bank Information**:

Bank	Begin typing a bank code or name. As you type the data, a drop-down list of corresponding data is displayed. The bank information must exist on the Finance > Tables > Bank Codes tab. Select a bank code. If the bank code or name is not known, click ⋮ to select a bank from the Banks lookup or press the SPACEBAR to view a list of banks.
Bank Acct Nbr	Type the corresponding bank account number for the selected bank.
Bank Acct Type	Select the account type for the selected bank and bank account number. *2 Checking account* *3 Savings account*
PreNote	Select to generate a prenote to the bank.

❏ Click **Copy from Payroll** to copy the employee’s bank information from the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab.

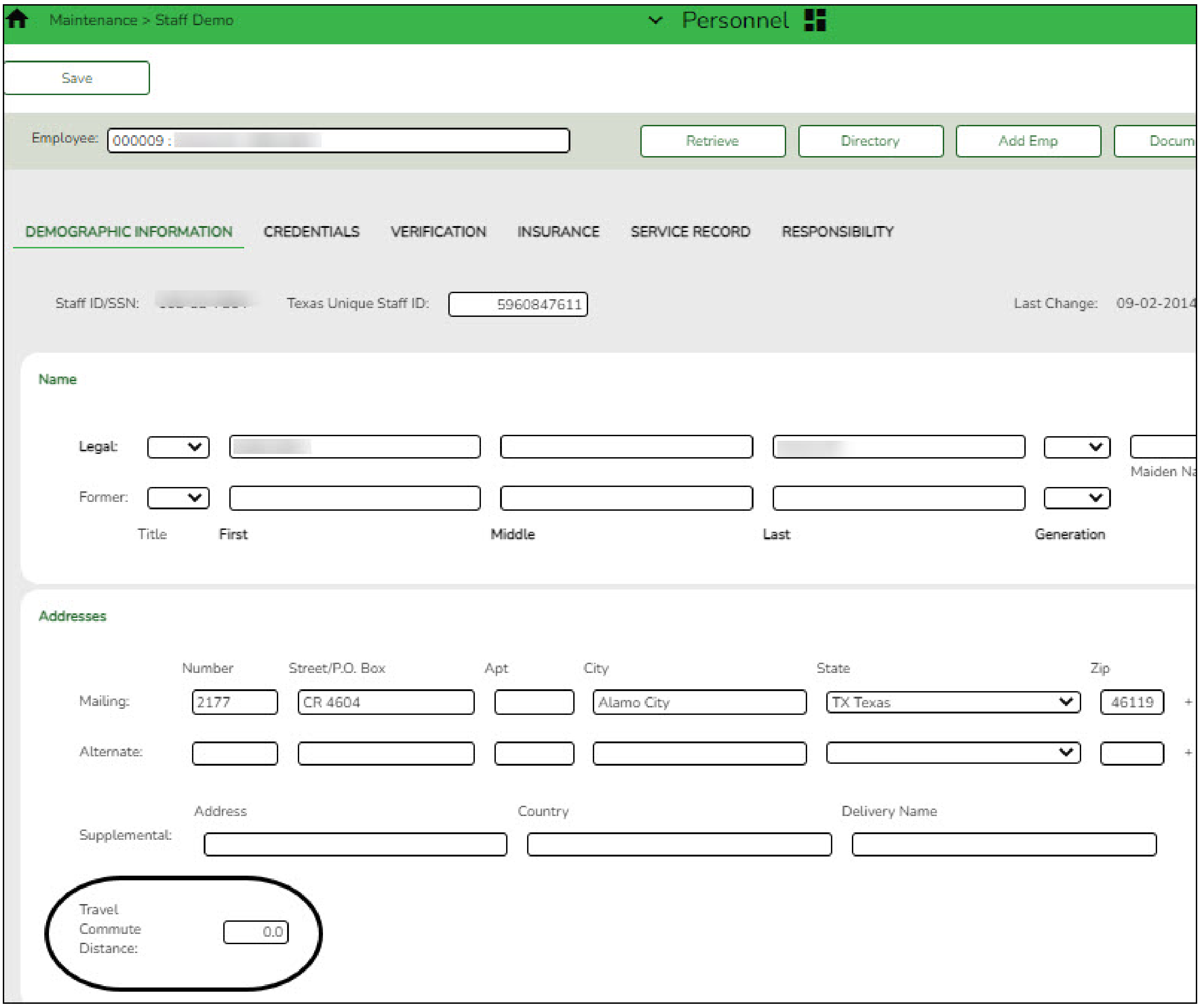
- The vendor must have an **EFT Email** listed on the Vendor Name/Address tab to save the record.
- The bank information on the Pay Info tab must have a zero **Bank Acct Amt** in order to be copied.
- This button only displays if the vendor and employee SSN records match. On the Finance > Maintenance > Vendor Information > Vendor Name/ Address tab, under **EIN/SSN**, the **Type** must be *SSN* and the **Number** must match the employee's **SSN** on the Personnel > Maintenance > Staff Demo > Demographic Information tab.

❏ Click **Save**.

3. Update employee's commute distance.

Personnel > Maintenance > Staff Demo > Demographic Information

Indicate the employee's commute distance. This information is used when calculating travel distances for travel reimbursement requests.



❑ In the **Travel Commute Distance** field, type the commute distance (the number of miles between the employee's home and assigned work location). Valid values are 0-999.9.

This field can also be updated by the employee via the **Commute Distance Change** link on the Travel Reimbursement Requests page in EmployeePortal.

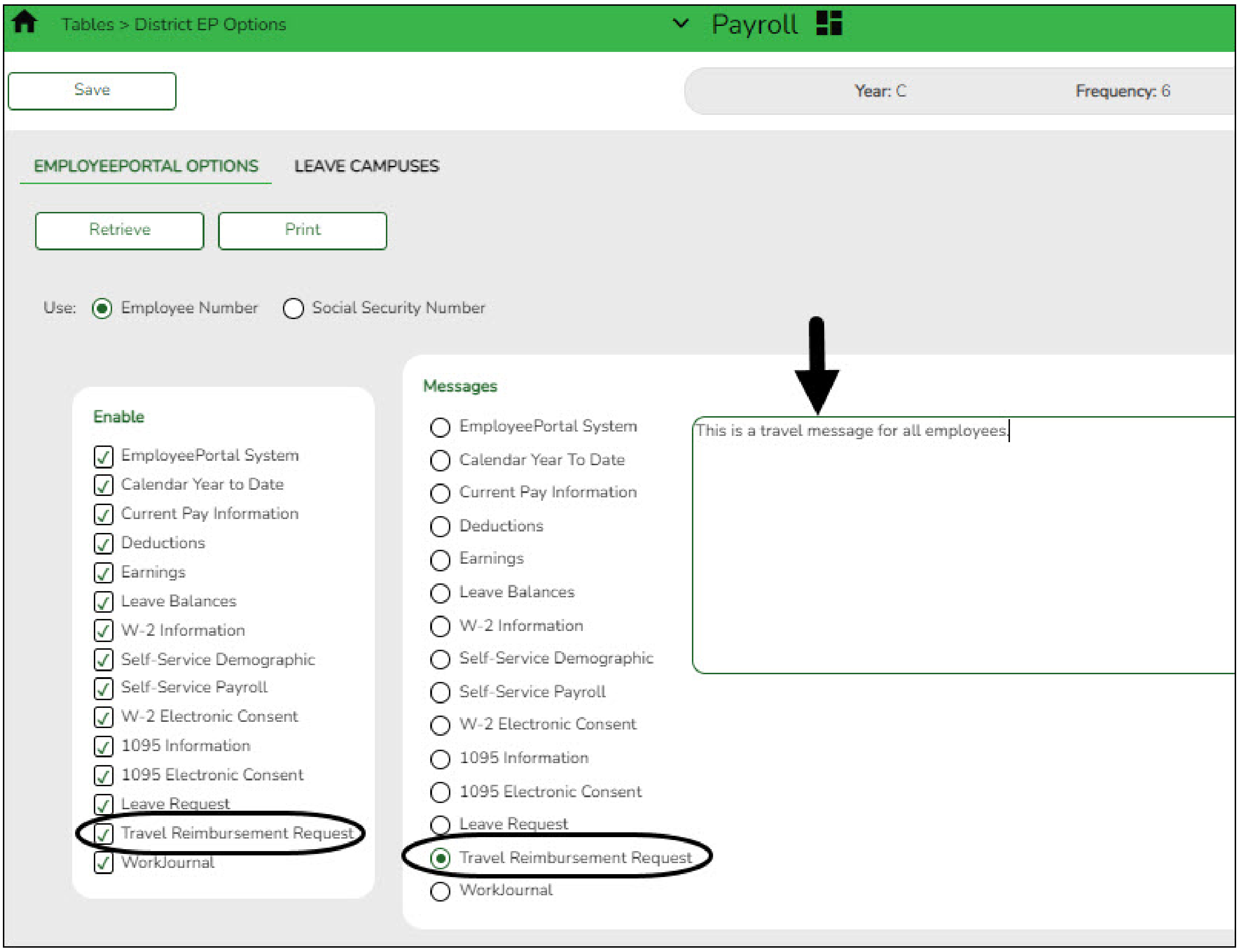
❑ Click **Save**.

Enable the Travel Reimbursement Request Feature

1. Set up district EP options.

   Payroll > Tables > District EP Options > EmployeePortal Options

   Set up the following EP options to allow employees to view the Travel Reimbursement Request menu in EmployeePortal.



❑ Under **Enable**, select **Travel Reimbursement Request** to enable the travel reimbursement request feature in EmployeePortal.

❏ Under **Messages**, select **Travel Reimbursement Request** to enable employees to view a preset message on the Travel Reimbursement Requests page in EmployeePortal.

- Type the applicable message in the text box.
- The message is displayed in red at the top of the Travel Requests page in EmployeePortal after the record is saved.

❏ Click **Save**.

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