



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.

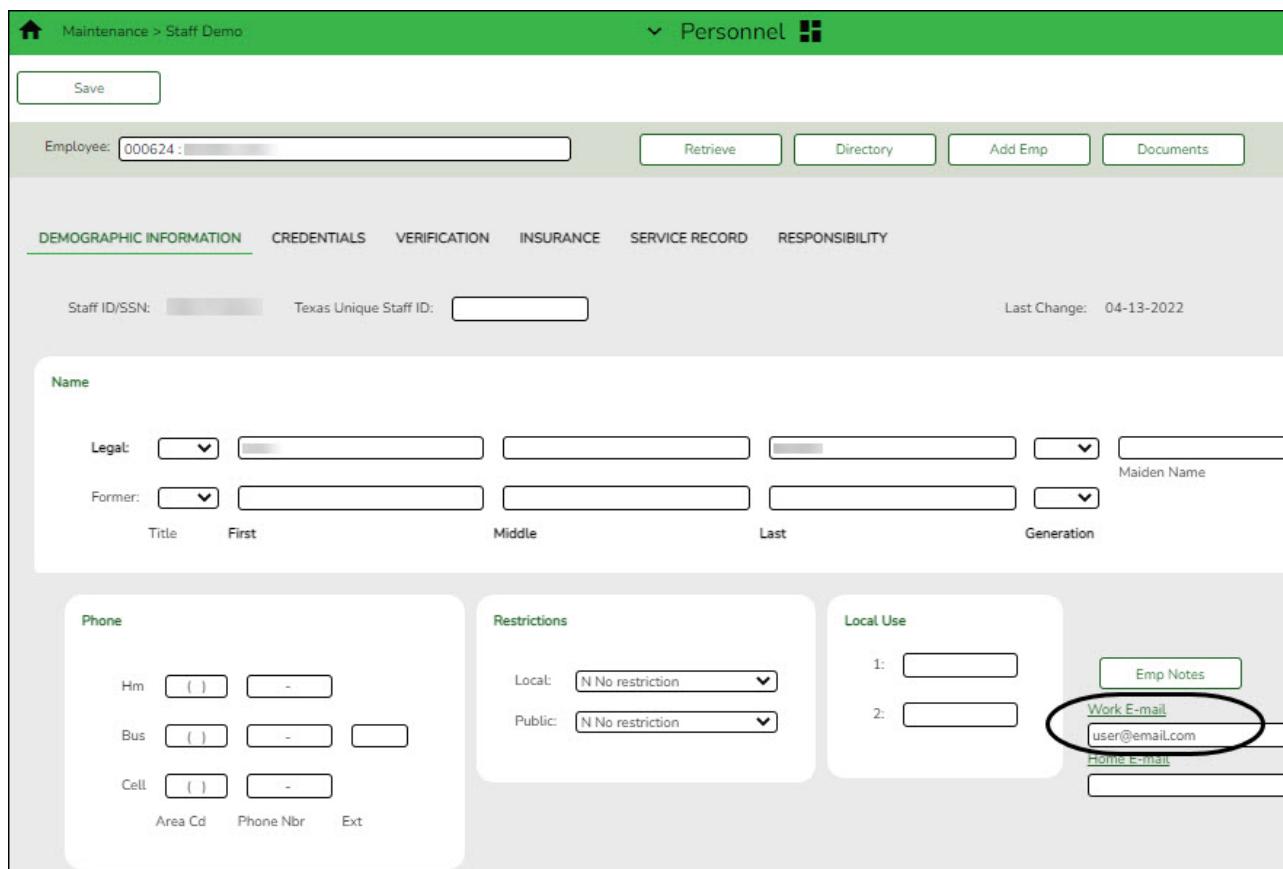
Set up Supervisor Profiles

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.



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

Work E-mail: user@email.com
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

- 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

Tables > EmployeePortal Supervisors

EMPLOYEE/SUPERVISOR

Start Employee Name:

Supervisor Name:

Save Retrieve Print Upload File

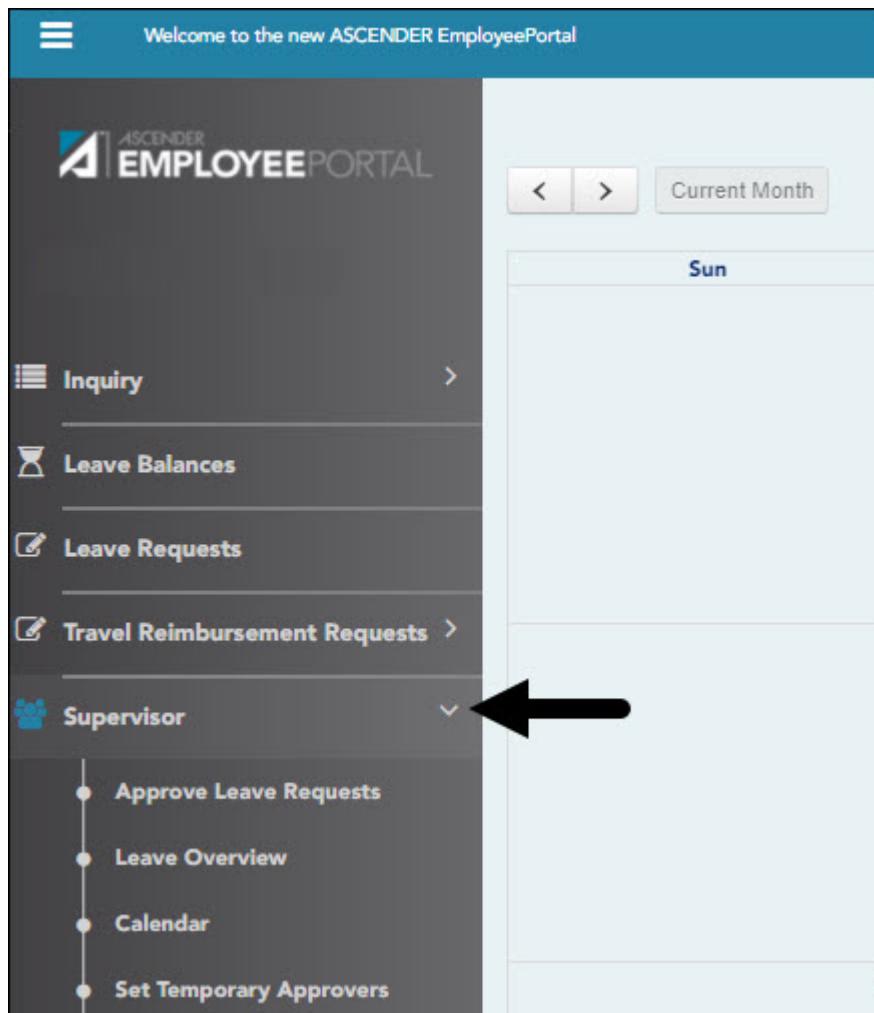
Employee Number	Last Name	Gen	First Name	Middle Name	Supervisor Number	Last Name	Gen	First Name	Middle Name	User ID
000624	PRESLEY	M	ELVIS	TESTUSER						

Delete 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.

Set up the Leave Request Feature

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 up district EP options.

[Payroll > Tables > District EP Options > EmployeePortal Options](#)

Tables > District EP Options

Payroll

Year: C Frequency: 6

EMPLOYEEPORTAL OPTIONS LEAVE CAMPUSES

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:

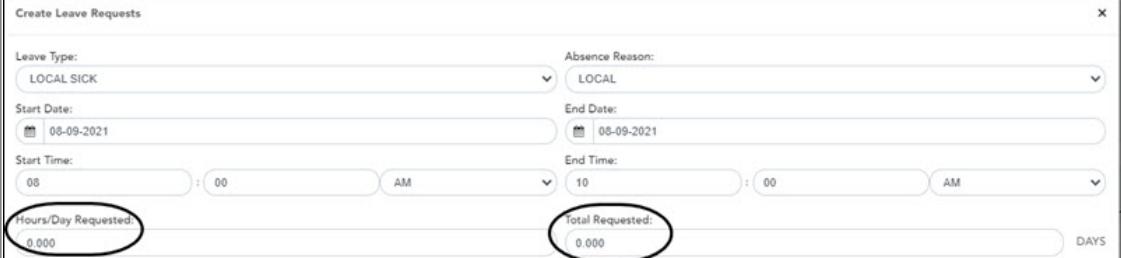
Type: From: mm-dd-yyyy

Unprocessed Leave Requests

Start Date	End Date	Start Time	End Time	Leave Type	Absence Reason
------------	----------	------------	----------	------------	----------------

No Results Found

Use PMIS for Supervisor Levels	(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. If this field is selected, you do not need to complete the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor page.
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Force Entry of Leave Hours Requested	<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> 
Meal Break for Leave Calculation	<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**.

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.

The screenshot shows a software interface for managing leave types. At the top, there are tabs for 'Tables > Leave', 'Payroll', 'Year: C', and 'Frequency: 6'. Below the tabs, there are buttons for 'Save', 'Retrieve', 'Print', and 'Copy'. The main area displays a table with columns: 'ABSENCE REASON', 'LEAVE TYPE DESCRIPTION', 'LEAVE TYPE', 'LEAVE RATES', 'LEAVE SEQUENCE', and 'UNITS'. A search bar for 'Leave Type' and a 'Start Up to Minute' input field (set to 0) are also present. The 'UNITS' column is currently selected. A modal window is open, showing a list of units for a specific leave type. The table in the modal has columns: 'Delete', 'Up to Minute', and 'Percent of Hour'. The data is as follows:

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 %

At the bottom of the modal, there are navigation buttons: 'First', 'Previous', '1', 'Last', and an 'Add' button.

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

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

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

[Delete](#) [Add](#)

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

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

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

Save

Year: C Frequency: 6

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



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