ASCENDER®
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER.
ELEVATING TECHNOLOGY SOLUTIONS

# Set up New Hires

# Table of Contents

***Before You Begin*** ..... 1
***Set up a Late Start New Hire*** ..... 2
***Additional Verification & Updates*** ..... 7

# ASCENDER - Position Management: Set up New Hires

The purpose of this document is to guide you through the necessary steps to set up new hires in Position Management.

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

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

---

## Before You Begin

Address District Administration settings.

District Administration > Options > Position Management

The following fields are used to:

- Prevent salary calculations on the employee's job info record.
- Prevent an employee from being entered without a position in PMIS.

| | |
|---|---|
| **Use PMIS** | Select to enable Position Management options and functionality. Do not select this option until you are ready to fully utilize Position Management.<br><br>If selected:<br>The **Automatically Compute** options (**Pay Rate**, **Daily Rate**, **Dock Rate**, **Accrual Rate**, and **Overtime Rate**) on the Payroll or Personnel > Tables > District HR Options page are cleared and disabled.<br><br>The **Calculate** button is disabled on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab as calculations are not allowed on the employee's job info record. |
| **Employee Must Be Assigned a Position Prior to Creating a Payroll Record** | Select to indicate if an employee must be assigned a position through PMIS before a payroll record is created. Do not select this option until you are ready to fully utilize PMIS.<br><br>If selected, the payroll department is restricted to setting up new employees with a pay type 4 code (substitute). |

| | |
|---|---|
| **(Optional) Round Salary to Nearest Whole Dollar** | Select to round the salary to the nearest whole dollar when it is calculated.<br>**Example**: If the daily rate x number of days = $49,999.68, the salary is rounded to $50,000.<br>**Note**: LEAs who prefer the monthly pay rate to be rounded to the nearest dollar for their employees should select this field. If the LEA prefers to see the monthly amount calculated to the penny, do not select this field. This will not affect salaries for budgeting purposes. The Salary Simulation provides an option to round to the nearest dollar when calculating budget amounts. |

District Administration > Tables > PMIS > Action Reason

This page is used to create and maintain a list of two-digit action reason codes to be used throughout the Position Management.

- Action reason codes represent the reason for a change in compensation (CIC).
- An action reason code is required each time a change in compensation (CIC) is processed.
- Codes 01-05 are automatically populated by the system and cannot be changed or deleted.
- All other codes are LEA-defined.

Action reason codes for termination transactions can be cross-referenced with the termination reason codes on the Personnel > Tables > Job / Contract > Termination Reason tab. Be sure to consider LEA-required data and statistics when creating the action reason codes.

---

# Set up a Late Start New Hire

The Change in Compensation (CIC) function is used for the following reasons:

- Set up new hires.
- Process any type of change from one position to another (e.g., promotion, demotion).
- Process a data correction.

Complete the following steps to set up a new employee who starts late in the school year.

1. Create a staff demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   Create a staff demographic record for the new employee. The employee must have an employee number prior to being added to Position Management.

2. Perform the Change in Compensation (CIC).

   Position Management > Maintenance > PMIS Change in Position > Change in Compensation

   > This page is used to change the position(s) and compensation amount(s) that are currently assigned to an employee. Existing positions and supplements can be added or removed from existing employees. In addition, you can assign an existing position to a new employee or add an additional position to an existing employee.
   >
   > When a Change in Compensation (CIC) transaction is approved, the previous job record is updated with the payoff amounts and information, and a new job record is inserted with the associated distributions. If the CIC is for a new hire, only the new information is inserted.

   ❑ Complete the following fields:

   | | |
   |---|---|
   | **Pay Frequency** | Click ⌄ to select a pay frequency. |
   | **Employee** | Begin typing the employee name or number that was generated on the Staff Demo page. Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click **Retrieve**. Or, click Directory to perform a search in the Employees Directory. |
   | **Effective Dt** | Type the new employee's start date in the MMDDYYYY format. |
   | **Action Reason** | Select an action reason code. The action reasons codes are maintained on the District Administration > Tables > PMIS > Action Reason page. |

   ❑ Click **Retrieve**. The retrieved page is blank since the employee is a new hire and is not currently assigned to a position.

   ❑ Click **Notes** to enter any CIC details. The notes can be used as a form of communication between the personnel and payroll departments. The notes are displayed on the Payroll > Maintenance > Approve CIP Transaction page under **CIP Notes**.

   ❑ Click **Next**. The New Positions page is displayed allowing you to assign an employee to a vacant position. Be sure to have the new employee’s pay grade, pay step, end date, and payoff date available when updating this tab.

   ❑ Click **+Add** to add a position to the employee's record. Click ⋮ next to the position number. A list of the LEA's vacant positions is displayed. Select the position to be assigned to the employee.

**Note**: If a vacant position at the LEA is not displayed in the list, verify that the distribution code (fiscal year), pay grade, etc. for the position is correct. Additionally, be sure to review the current year first pay date codes on the District Administration > Tables > PMIS > First Pay Date > Current Year tab for accuracy. Positions with incorrect information are not displayed in the list.

☐ Complete the following fields:

| | |
|---|---|
| **Primary Job** | Select if this is the primary job for the employee. An employee may have only one primary job. |
| **Pay Grade** | Click ⋮ to select the pay grade at which the employee is paid. The field is used to identify the correct salary amount on the salary table. |
| **Pay Step** | Click ⋮ select the pay step at which the employee is paid. The field is used to identify the correct salary amount on the salary table. |
| **Schedule** | Click ⋮ select the local sub schedule of the employee’s pay grade and step. The field is used to identify the correct salary amount on the salary table. |
| **State Step** | Type the state step that the employee has earned based on years of service plus career ladder step(s), if applicable. |
| **End Date** | Type the ending date for the calendar selected in the MMDDYYYY format. |
| **Payoff Date** | Type the date on which the employee's contract is paid off in the MMDDYYYY format. When this date and the pay date match, contract payoff occurs. |
| **Remaining Payments** | Type the number of payments remaining to be made to the employee during the current contract period. |

☐ Click **Calculate** to calculate the employee's salary. The reflected salary is calculated as if the employee worked the full year. The pro-rated salary is reflected in the salary letter in the following steps.

**TIP**: It is only necessary to populate the **Hourly/Daily Rate** if the employee is tied to a midpoint table. The field is automatically calculated and populated for employees with a **Local Annual** or **Hourly/Daily** salary schedule.

☐ Click **Next**. The Current Supplements page is displayed with a list of the employee's current supplements; however, the page is blank since the employee is a new hire.

☐ Click **Next**. The New Supplements page is displayed. If applicable, add supplements on this page.

☐ Click **+Add** to add a supplement. Click the ⋮ next to the position number. A list of the LEA's vacant supplement positions is displayed. Select the supplement to be added to the employee's record.

| | |
|---|---|
| **Remaining Payments** | Type the number of remaining payments to be made to the employee during the current contract period. |

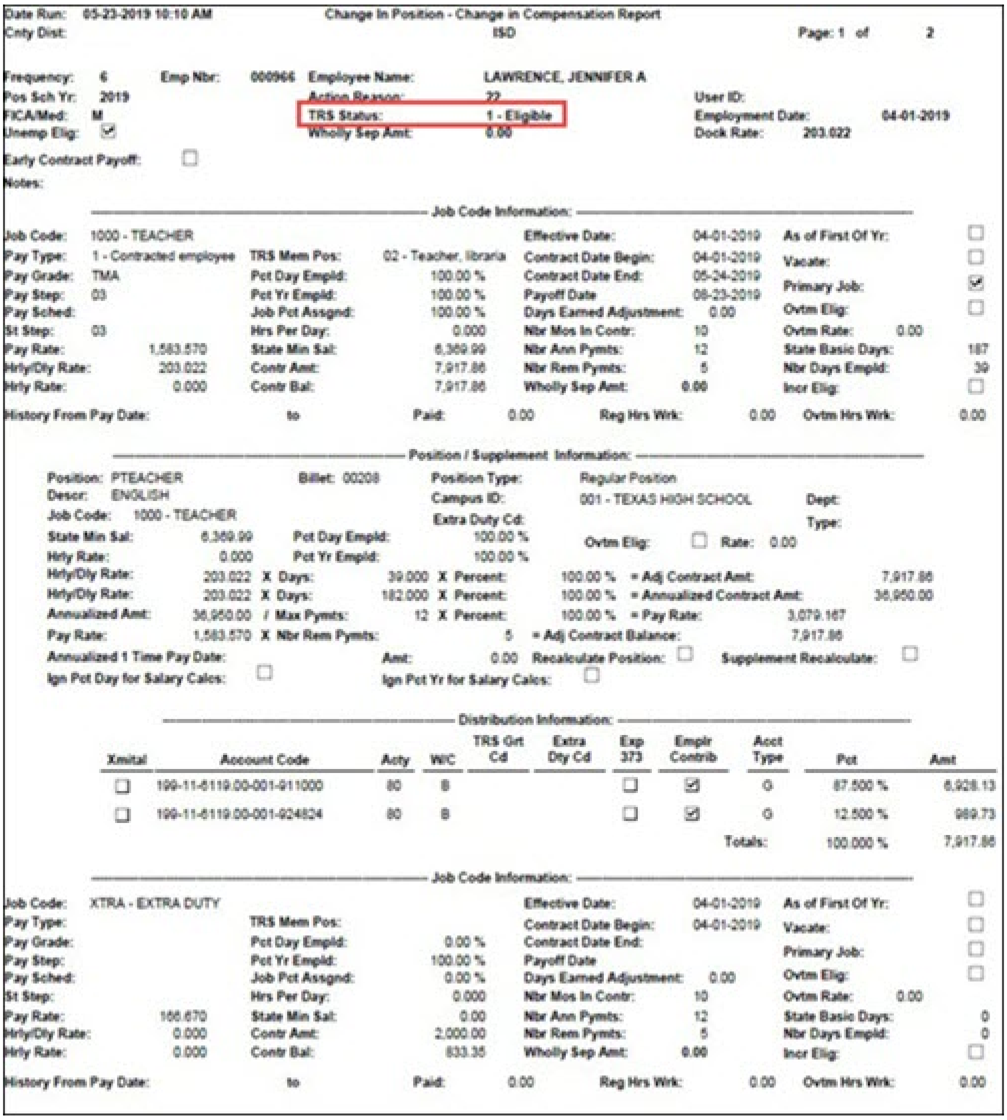
**Notes**:

- The supplement amount is divided by the number of pay periods in a year and that amount is multiplied by the remaining payments to calculate the annual amount for employees who start late in the year. The **Supplement Pay Amount** on this page can be modified, if needed.
- If the supplement is a G account type in the extra duty table, contact your regional ESC consultant for assistance before proceeding.

❑ Click **Execute**. The Change in Position - Change in Compensation Report is displayed. Verify the report for accuracy. This report can be used as the salary letter and reviewed with the employee. A list of all of the fields that are updated after the changes are approved and processed is listed in step 3.

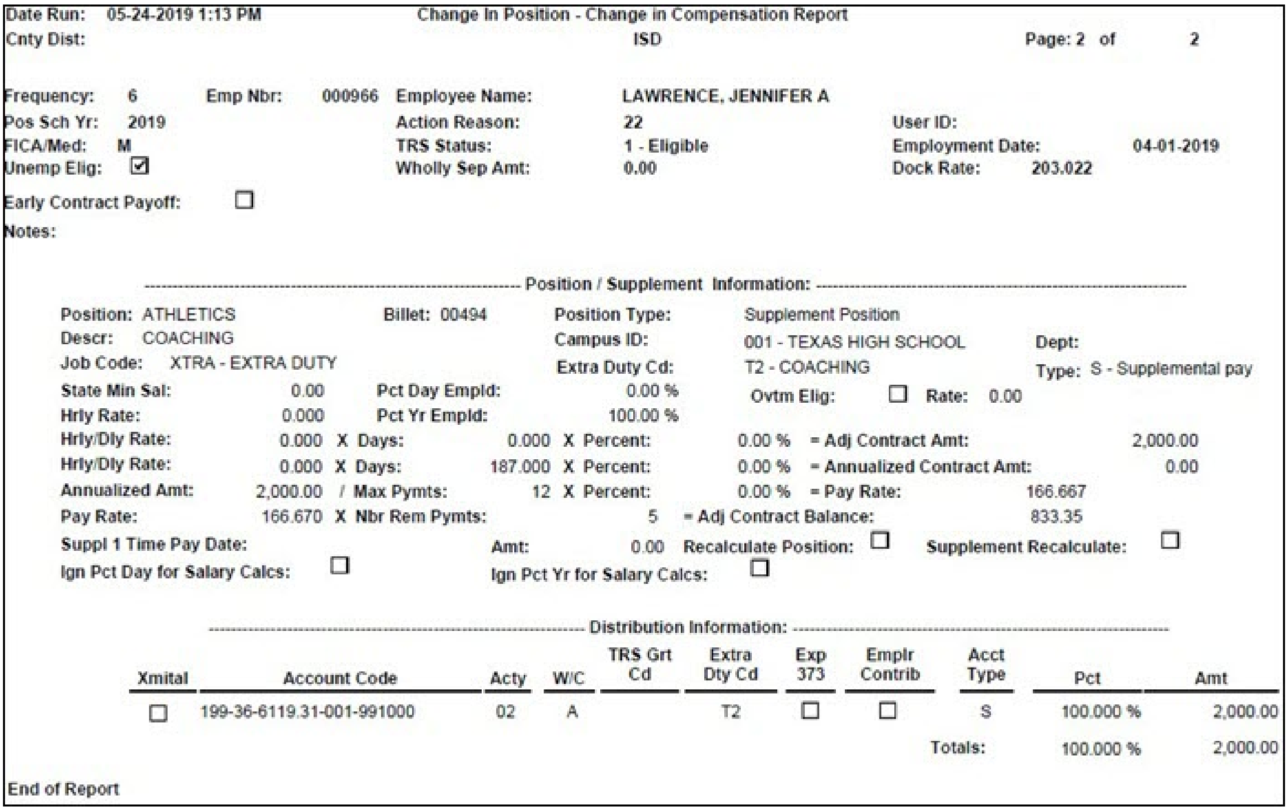
The TRS eligibility status comes from the Budget tab on the position. If the employee is not TRS-eligible or is retired and the report reflects otherwise, cancel the process and change the **TRS Status** on the Budget tab for the position.

### Primary Position



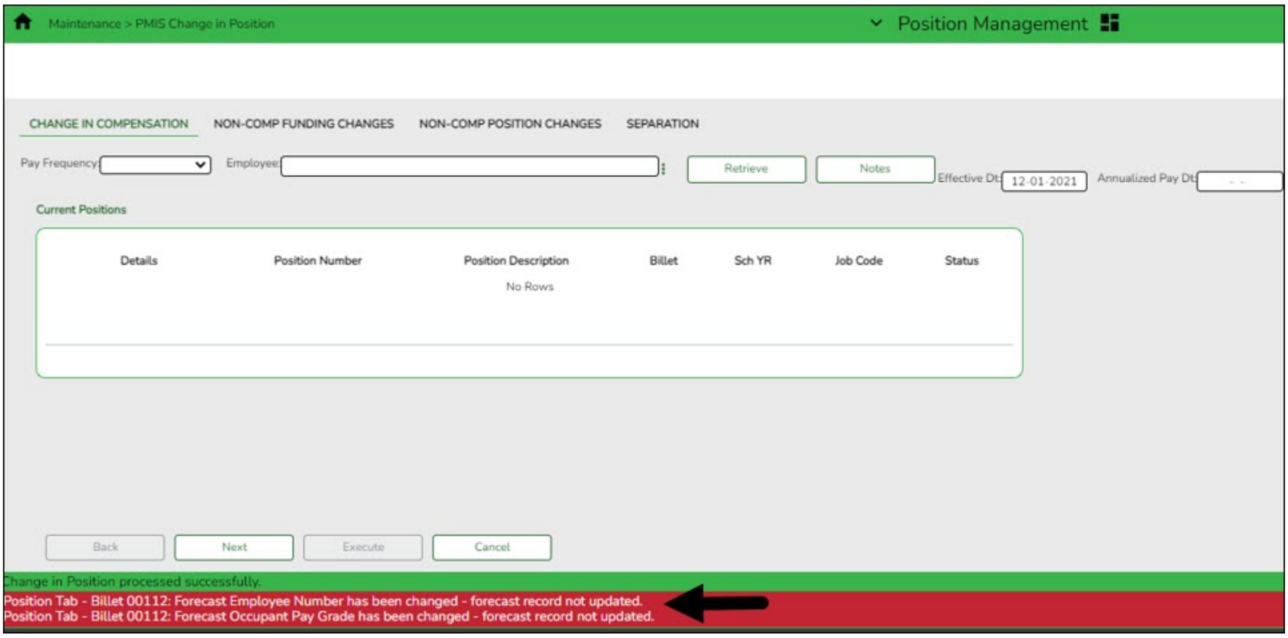
```
Date Run:   05-23-2019 10:10 AM         Change In Position - Change in Compensation Report
Cnty Dist:                                             ISD                               Page: 1  of      2

Frequency:   6      Emp Nbr:   000966   Employee Name:    LAWRENCE, JENNIFER A
Pos Sch Yr:  2019                       Action Reason:    22                   User ID:
FICA/Med:    M                          TRS Status:       1 - Eligible         Employment Date:     04-01-2019
Unemp Elig:  ☑                          Wholly Sep Amt:   0.00                 Dock Rate:    203.022
Early Contract Payoff:   ☐
Notes:

        ------------------------------ Job Code Information: ------------------------------
Job Code:   1000 - TEACHER                                    Effective Date:         04-01-2019  As of First Of Yr:     ☐
Pay Type:   1 - Contracted employee  TRS Mem Pos:   02 - Teacher, libraria  Contract Date Begin:  04-01-2019  Vacate:  ☐
Pay Grade:  TMA                      Pct Day Empld:     100.00 %  Contract Date End:      05-24-2019  Primary Job:           ☑
Pay Step:   03                       Pct Yr Empld:      100.00 %  Payoff Date             08-23-2019  Ovtm Elig:             ☐
Pay Sched:                           Job Pct Assgnd:    100.00 %  Days Earned Adjustment:   0.00      Ovtm Rate:      0.00
St Step:    03                       Hrs Per Day:         0.000   Nbr Mos In Contr:         10        State Basic Days:     187
Pay Rate:        1,583.570           State Min Sal:    6,369.99   Nbr Ann Pymts:            12        Nbr Days Empld:        39
Hrly/Dly Rate:     203.022           Contr Amt:        7,917.86   Nbr Rem Pymts:            5         Incr Elig:             ☐
Hrly Rate:           0.000           Contr Bal:        7,917.86   Wholly Sep Amt:         0.00
History From Pay Date:            to            Paid:      0.00        Reg Hrs Wrk:       0.00    Ovtm Hrs Wrk:        0.00

        ------------------------- Position / Supplement  Information: -------------------------
    Position:  PTEACHER               Billet:  00208     Position Type:       Regular Position
    Descr:     ENGLISH                                   Campus ID:           001 - TEXAS HIGH SCHOOL     Dept:
    Job Code:     1000 - TEACHER                         Extra Duty Cd:                                   Type:
    State Min Sal:       6,369.99    Pct Day Empld:       100.00 %     Ovtm Elig:   ☐   Rate:   0.00
    Hrly Rate:              0.000    Pct Yr Empld:        100.00 %
    Hrly/Dly Rate:        203.022  X  Days:      39.000  X  Percent:    100.00 %  = Adj Contract Amt:          7,917.86
    Hrly/Dly Rate:        203.022  X  Days:     182.000  X  Percent:    100.00 %  = Annualized Contract Amt:  36,950.00
    Annualized Amt:     36,950.00  /  Max Pymts:      12  X  Percent:    100.00 %  = Pay Rate:          3,079.167
    Pay Rate:           1,583.570  X  Nbr Rem Pymts:           5   = Adj Contract Balance:           7,917.86
    Annualized 1 Time Pay Date:                   Amt:        0.00  Recalculate Position:  ☐   Supplement Recalculate:  ☐
    Ign Pct Day for Salary Calcs:   ☐             Ign Pct Yr for Salary Calcs:   ☐

                  -------------------- Distribution Information: --------------------
                                                    TRS Grt   Extra    Exp   Emplr    Acct
        Xmital      Account Code         Acty  W/C    Cd     Dty Cd   373   Contrib  Type       Pct          Amt
          ☐    199-11-6119.00-001-911000   80    8                     ☐      ☑       0      87.500 %     6,928.13
          ☐    199-11-6119.00-001-924824   80    8                     ☐      ☑       0      12.500 %       989.73
                                                                                Totals:     100.000 %     7,917.86

        ------------------------------ Job Code Information: ------------------------------
Job Code:   XTRA - EXTRA DUTY                                 Effective Date:         04-01-2019  As of First Of Yr:     ☐
Pay Type:                            TRS Mem Pos:                 Contract Date Begin:    04-01-2019  Vacate:                ☐
Pay Grade:                           Pct Day Empld:       0.00 %  Contract Date End:                  Primary Job:           ☐
Pay Step:                            Pct Yr Empld:      100.00 %  Payoff Date                         Ovtm Elig:             ☐
Pay Sched:                           Job Pct Assgnd:      0.00 %  Days Earned Adjustment:   0.00      Ovtm Rate:      0.00
St Step:                             Hrs Per Day:         0.000   Nbr Mos In Contr:         10        State Basic Days:       0
Pay Rate:          166.670           State Min Sal:        0.00   Nbr Ann Pymts:            12        Nbr Days Empld:         0
Hrly/Dly Rate:       0.000           Contr Amt:        2,000.00   Nbr Rem Pymts:            5         Incr Elig:             ☐
Hrly Rate:           0.000           Contr Bal:          833.35   Wholly Sep Amt:         0.00
History From Pay Date:            to            Paid:      0.00        Reg Hrs Wrk:       0.00    Ovtm Hrs Wrk:        0.00
```

### Supplement Position



```
Date Run:   05-24-2019 1:13 PM              Change In Position - Change in Compensation Report
Cnty Dist:                                              ISD                                  Page: 2  of      2

Frequency:    6        Emp Nbr:     000966   Employee Name:        LAWRENCE, JENNIFER A
Pos Sch Yr:   2019                           Action Reason:        22                          User ID:
FICA/Med:     M                              TRS Status:           1 - Eligible                Employment Date:        04-01-2019
Unemp Elig:   ☑                              Wholly Sep Amt:       0.00                        Dock Rate:      203.022
Early Contract Payoff:      ☐
Notes:

          ---------------------------------------------- Position / Supplement  Information: ----------------------------------------------
     Position:  ATHLETICS                Billet:  00494       Position Type:        Supplement Position
     Descr:     COACHING                                      Campus ID:            001 - TEXAS HIGH SCHOOL       Dept:
     Job Code:     XTRA - EXTRA DUTY                          Extra Duty Cd:        T2 - COACHING                 Type:  S - Supplemental pay
     State Min Sal:             0.00     Pct Day Empld:              0.00 %       Ovtm Elig:      ☐    Rate:    0.00
     Hrly Rate:                 0.000    Pct Yr Empld:             100.00 %
     Hrly/Dly Rate:             0.000  X  Days:            0.000  X  Percent:        0.00 %   = Adj Contract Amt:                2,000.00
     Hrly/Dly Rate:             0.000  X  Days:          187.000  X  Percent:        0.00 %   = Annualized Contract Amt:             0.00
     Annualized Amt:         2,000.00  /  Max Pymts:          12  X  Percent:        0.00 %   = Pay Rate:               166.667
     Pay Rate:                166.670  X  Nbr Rem Pymts:                5   = Adj Contract Balance:           833.35
     Suppl 1 Time Pay Date:                          Amt:           0.00   Recalculate Position:  ☐      Supplement Recalculate:   ☐
     Ign Pct Day for Salary Calcs:      ☐            Ign Pct Yr for Salary Calcs:   ☐

                 ------------------------------------------------ Distribution Information: ------------------------------------------------
                                                              TRS Grt    Extra     Exp     Emplr      Acct
            Xmital         Account Code            Acty  W/C     Cd      Dty Cd    373     Contrib    Type        Pct              Amt
              ☐     199-36-6119.31-001-991000       02    A                T2       ☐        ☐         S       100.000 %       2,000.00
                                                                                                Totals:      100.000 %       2,000.00
End of Report
```

Messages similar to the below are displayed if the current year position was updated and the next year position was not updated. If the new employee should be added to the next year PMIS, change to the next year payroll frequency and add the new employee to the position.



Effective Dt 12-01-2021   Annualized Pay Dt - -

Current Positions

| Details | Position Number | Position Description | Billet | Sch YR | Job Code | Status |
|---|---|---|---|---|---|---|
| | | No Rows | | | | |

Change in Position processed successfully.
Position Tab - Billet 00112: Forecast Employee Number has been changed - forecast record not updated.
Position Tab - Billet 00112: Forecast Occupant Pay Grade has been changed - forecast record not updated.

3. Approve a CIP transaction.

   Payroll > Maintenance > Approve CIP Transaction

   After the Change in Position - Change in Compensation Report is processed, the information is displayed on the Payroll > Maintenance > Approve CIP Transaction page, which is the final step before the employee record is updated on the Payroll > Maintenance > Staff Job/Pay Data page.

If the LEA has a personnel and payroll department, it is possible that the personnel department submitted the information on the Change in Position - Change in Compensation page. This step allows the payroll department to review the salary calculation for the employee and perform one of the following actions:

- **Mark Reviewed** - If the payroll department needs additional time to review the information before approving it, enter a date in the **Date Reviewed** field and click **Mark Reviewed**. This informs the personnel department that the payroll department is still reviewing the information.
- **Approve** - If you click **Approve**, the Staff Job/Pay Data fields from the position are updated. A message indicating that the transaction was approved is displayed.
- **Reject** - If the information is incorrect, click **Reject**. You are prompted to enter the rejection date and reason. Once an item is rejected, it must be reviewed on the Position Management > Maintenance > PMIS Payroll Rejections page. If you need to reverse and remove it from a pending status, click **Rollback**. All changes from the initial Change in Position request are reversed.

After the changes are approved and processed, the following pages/fields are updated.

**Note**: New employees are set up with a 90-day end date for TRS as if they do not have a TRS account. Verify and make corrections, if applicable.

Remember to verify all information and make any necessary changes. Also, note that State Min Salary **% Assigned** is 0. This field needs to be updated for professional employees who are subject to the statutory minimum.

**Note**: For LEAs that accrue, the accrual information is not entered on the position, it is based on the job code for that position and obtained from the job code table. Verify that the accrual code is accurate on the Payroll > Maintenance > Staff Job/Pay Data page.

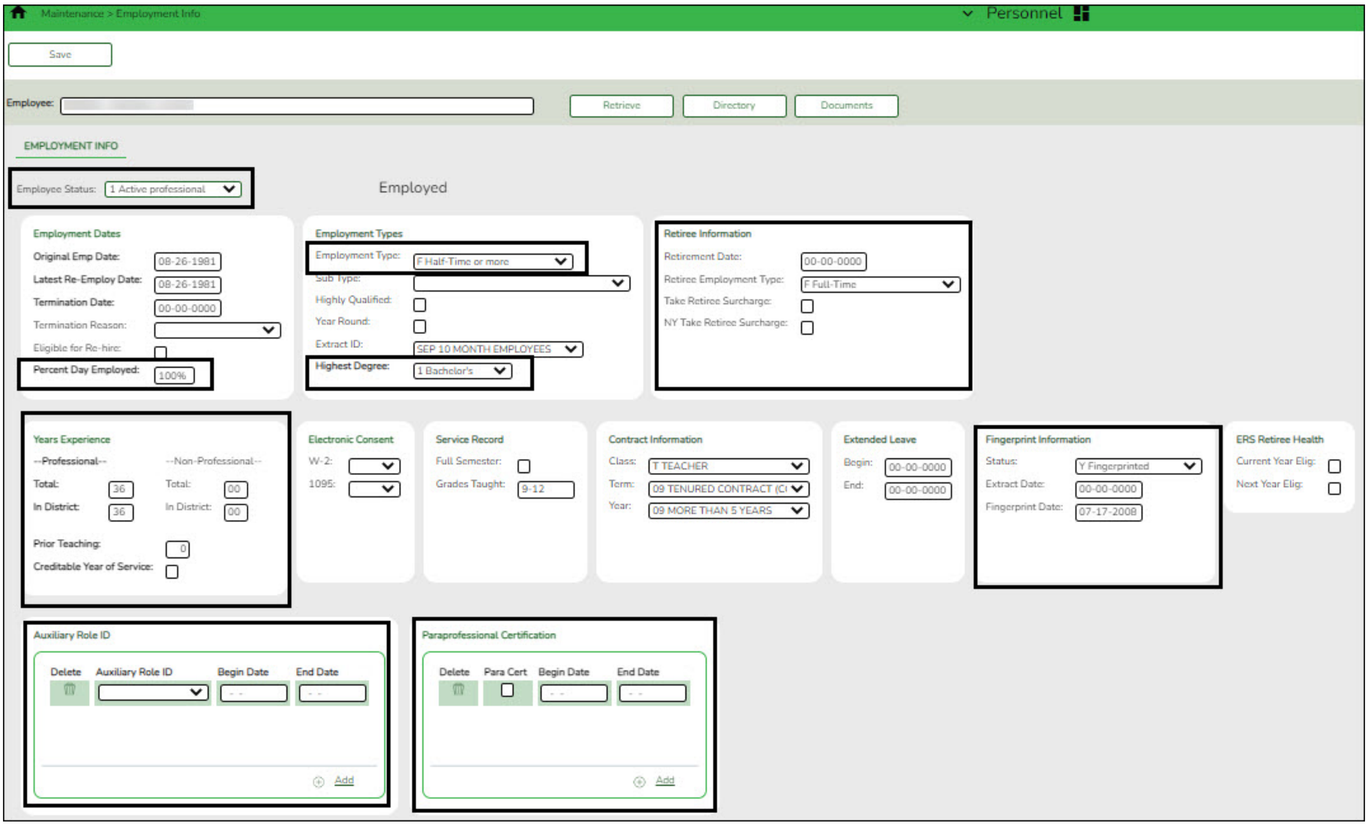
This process builds the **Days Earned** field to modify accruals on the Payroll > Maintenance > Hours/Pay Transmittals > Abs Ded tab if needed.

---

## Additional Verification & Updates

Verify or manually update the following fields:

## Personnel > Maintenance > Employment Info



Employee: [redacted]

Employee Status: 1 Active professional

Employed

**Employment Dates**

Original Emp Date: 08-26-1981

Latest Re-Employ Date: 08-26-1981

Termination Date: 00-00-0000

Termination Reason:

Eligible for Re-hire: ☐

Percent Day Employed: 100%

**Employment Types**

Employment Type: F Half-Time or more

Sub Type:

Highly Qualified: ☐

Year Round: ☐

Extract ID: SEP 10 MONTH EMPLOYEES

Highest Degree: 1 Bachelor's

**Retiree Information**

Retirement Date: 00-00-0000

Retiree Employment Type: F Full-Time

Take Retiree Surcharge: ☐

NY Take Retiree Surcharge: ☐

**Years Experience**

--Professional-- Total: 36 In District: 36

--Non-Professional-- Total: 00 In District: 00

Prior Teaching: 0

Creditable Year of Service: ☐

**Electronic Consent**

W-2:

1095:

**Service Record**

Full Semester: ☐

Grades Taught: 9-12

**Contract Information**

Class: T TEACHER

Term: 09 TENURED CONTRACT (C

Year: 09 MORE THAN 5 YEARS

**Extended Leave**

Begin: 00-00-0000

End: 00-00-0000

**Fingerprint Information**

Status: Y Fingerprinted

Extract Date: 00-00-0000

Fingerprint Date: 07-17-2008

**ERS Retiree Health**

Current Year Elig: ☐

Next Year Elig: ☐

**Auxiliary Role ID**

| Delete | Auxiliary Role ID | Begin Date | End Date |
|---|---|---|---|
| | | - - | - - |

**Paraprofessional Certification**

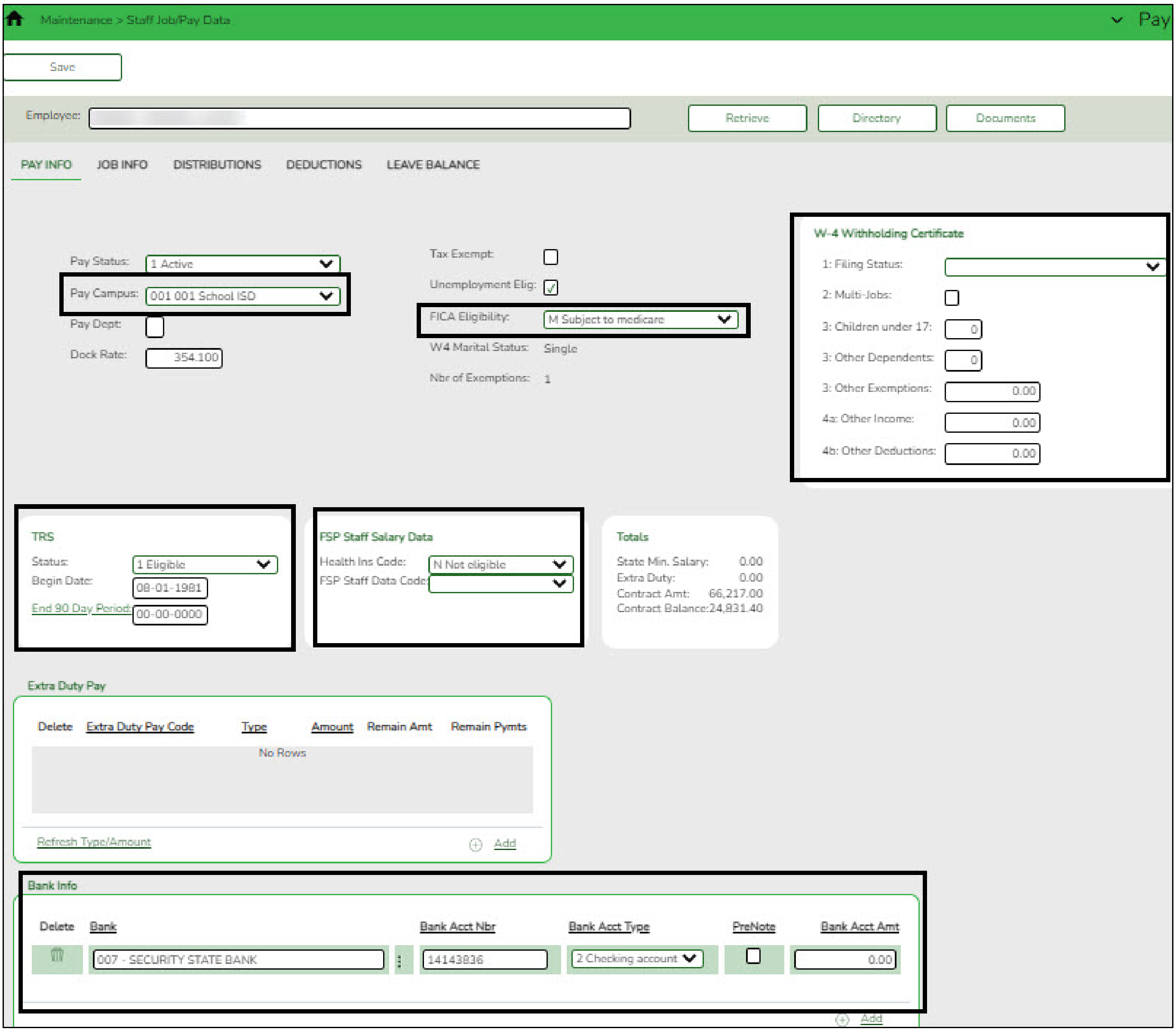
| Delete | Para Cert | Begin Date | End Date |
|---|---|---|---|
| | ☐ | - - | - - |

- **Employee Status**
- **Percent Day Employed** (bus driver example)
- **Highest Degree**
- **Years Experience**
- **Employment Type**

If applicable:

- **Fingerprint Information**
- **Retirement Date**
- **Retiree Surcharge**
- **Retiree Employment Type**
- **PEIMS Auxiliary Role ID**
- **Paraprofessional Certification**

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


Maintenance > Staff Job/Pay Data
Pay
Save
Retrieve
Directory
Documents
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE
Refresh Type/Amount
Add
Add

Employee: [redacted]

Pay Status: 1 Active
Pay Campus: 001 001 School ISD
Pay Dept: ☐
Dock Rate: 354.100

Tax Exempt: ☐
Unemployment Elig: ☑
FICA Eligibility: M Subject to medicare
W4 Marital Status: Single
Nbr of Exemptions: 1

W-4 Withholding Certificate
1: Filing Status:
2: Multi-Jobs: ☐
3: Children under 17: 0
3: Other Dependents: 0
3: Other Exemptions: 0.00
4a: Other Income: 0.00
4b: Other Deductions: 0.00

TRS
Status: 1 Eligible
Begin Date: 08-01-1981
End 90 Day Period: 00-00-0000

FSP Staff Salary Data
Health Ins Code: N Not eligible
FSP Staff Data Code:

Totals
State Min. Salary: 0.00
Extra Duty: 0.00
Contract Amt: 66,217.00
Contract Balance: 24,831.40

Extra Duty Pay

| Delete | Extra Duty Pay Code | Type | Amount | Remain Amt | Remain Pymts |
|---|---|---|---|---|---|

No Rows

Bank Info

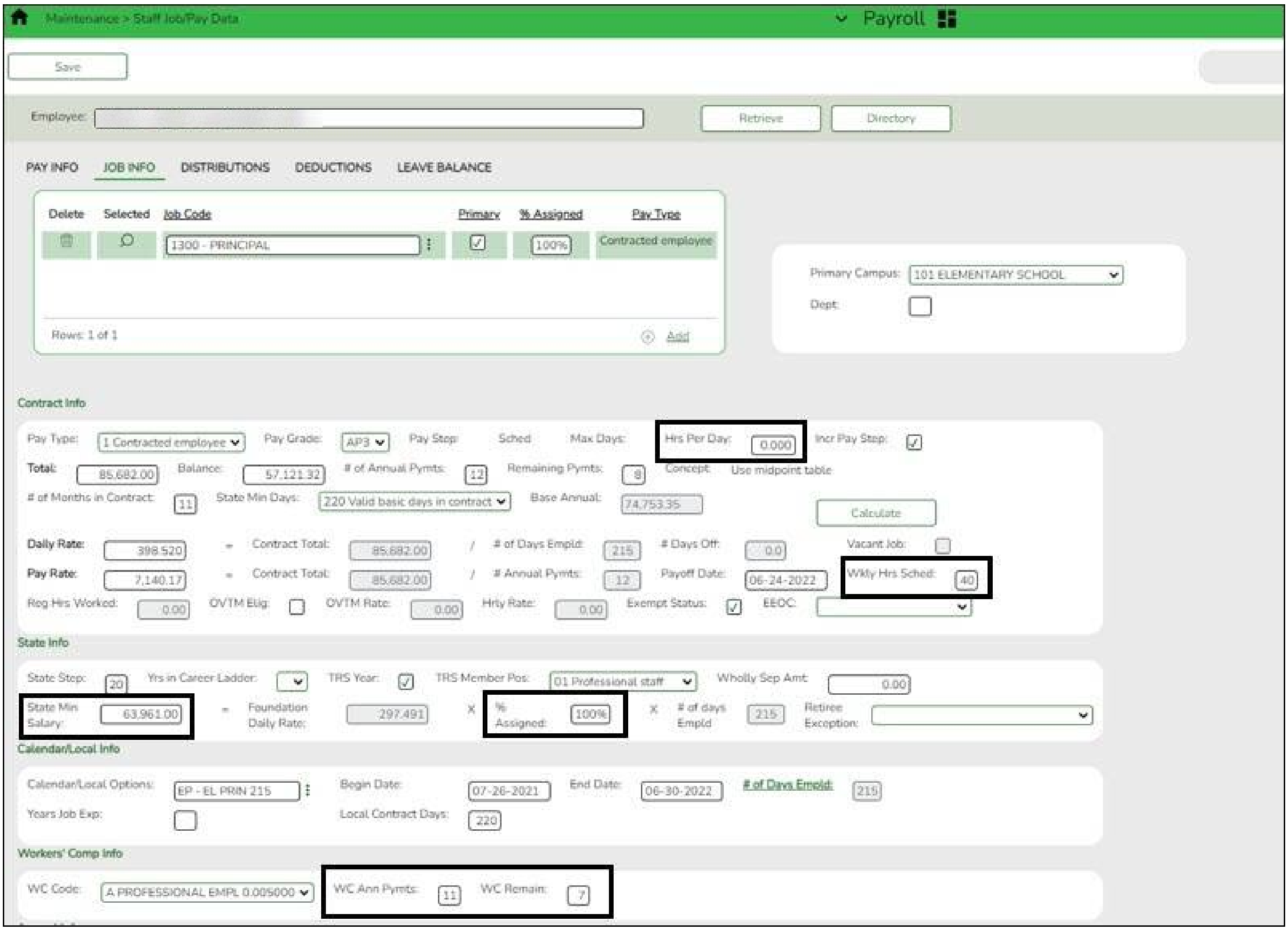
| Delete | Bank | Bank Acct Nbr | Bank Acct Type | PreNote | Bank Acct Amt |
|---|---|---|---|---|---|
|  | 007 - SECURITY STATE BANK | 14143836 | 2 Checking account | ☐ | 0.00 |

- **Pay Campus**
- **FICA Eligibility**
- **W-4 Withholding Certificate**
- **FSP Staff Salary Data**

If applicable:

- Bank/EFT Information
- It is important to verify the **TRS Status** and **End 90 Day Period** date. If the employee is not subject to the New Member Surcharge, update the dates in these fields.

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



Employee: [redacted]

| Delete | Selected | Job Code | Primary | % Assigned | Pay Type |
|---|---|---|---|---|---|
| | | 1300 - PRINCIPAL | ☑ | 100% | Contracted employee |

Rows: 1 of 1

Primary Campus: 101 ELEMENTARY SCHOOL
Dept: ☐

Contract Info

Pay Type: 1 Contracted employee
Pay Grade: AP3
Pay Step:
Sched
Max Days:
Hrs Per Day: 0.000
Incr Pay Step: ☑
Total: 85,682.00
Balance: 57,121.32
# of Annual Pymts: 12
Remaining Pymts: 8
Concept: Use midpoint table
# of Months in Contract: 11
State Min Days: 220 Valid basic days in contract
Base Annual: 74,753.35
Daily Rate: 398.520 = Contract Total: 85,682.00 / # of Days Empld: 215
# Days Off: 0.0
Vacant Job: ☐
Pay Rate: 7,140.17 = Contract Total: 85,682.00 / # Annual Pymts: 12
Payoff Date: 06-24-2022
Wkly Hrs Sched: 40
Reg Hrs Worked: 0.00
OVTM Elig: ☐
OVTM Rate: 0.00
Hrly Rate: 0.00
Exempt Status: ☑
EEOC:

State Info

State Step: 20
Yrs in Career Ladder:
TRS Year: ☑
TRS Member Pos: 01 Professional staff
Wholly Sep Amt: 0.00
State Min Salary: 63,961.00 = Foundation Daily Rate: 297.491 x % Assigned: 100% x # of days Empld: 215
Retiree Exception:

Calendar/Local Info

Calendar/Local Options: EP - EL PRIN 215
Begin Date: 07-26-2021
End Date: 06-30-2022
# of Days Empld: 215
Years Job Exp: ☐
Local Contract Days: 220

Workers' Comp Info

WC Code: A PROFESSIONAL EMPL 0.005000
WC Ann Pymts: 11
WC Remain: 7

- **Weekly Hours Scheduled**
- **% Assigned** for State Minimum
- **State Min Salary**

If applicable:

- **WC Ann Pymts**
- **WC Remain**
- **Hrs Per Day**

The Deduction and Leave Balance tabs must be manually updated as they are not populated.