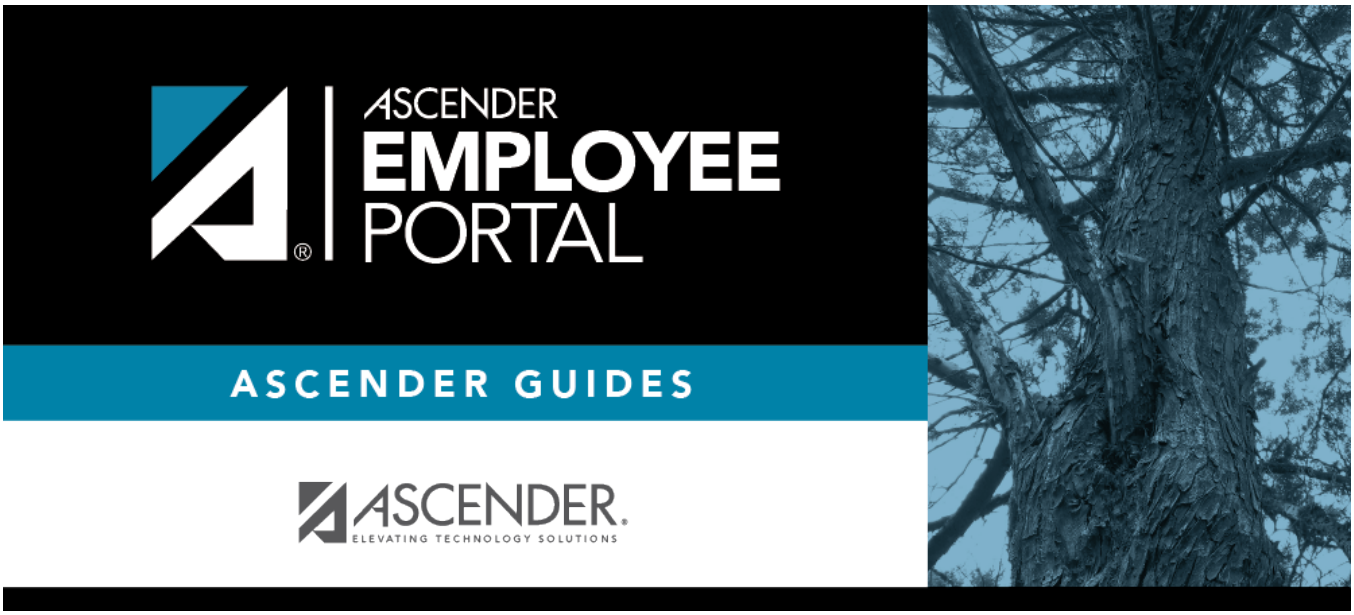


Employee Guide: Update Demographic & Payroll Information (Self-Service)

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Employee Guide: Self-Service Updates

Welcome to ASCENDER EmployeePortal. This application provides you with access to various employee data inquiries and maintenance features.

EmployeePortal offers self-service, which allows you to view and submit changes to your demographic and payroll information such as changes to your address, withholding and exemption status, and direct deposit settings. Some changes may require additional approval or documentation, which is predetermined by your local education agency (LEA).

Your LEA determines the pages and data fields that can be viewed and/or edited in EmployeePortal. If you have questions, contact your EmployeePortal administrator.

Before You Begin

Review the ASCENDER EmployeePortal Navigation page to familiarize yourself with the portal.

TIP: If you have any new notifications from EmployeePortal, you will see the number of pending notifications in the top-right corner of the page. Hover over the bell icon to view your notifications. Or, click the bell icon to view the notifications page. From the notifications page, click the eye icon to clear your notifications.

I. Update Demographic & Payroll Information

Use the Employee Self-Service page to submit changes to your personal demographic and payroll information. Depending on your LEA, some requests may or may not require additional documentation and/or approval.

Click your name in the upper-left corner of the page or click  in the upper-right corner of the page at any time to access the Self-Service Profile page.

This page is used to enter and request updates to your demographic and payroll information. Your information as it currently exists in your record is displayed.

You can also change your password from this page. Click Change Password and follow the appropriate steps.

❑ The fields that you are allowed to view and update are determined by your LEA. Your submitted

changes may go through an approval process.

❑ Your current information is displayed in the **Current** and **New** columns.

- The **Current** column is display only.
- The **New** column is only enabled if your LEA allows updates to the data. If the **New** column fields are enabled, you can enter your changes and click **Save**. The data is saved and submitted for approval.
- Pending requests are highlighted yellow after the changes are submitted.
    - If approval is not required, the changes are made immediately.
    - If the requests are pending approval, you can continue to change your request until it has been approved and updated in the system.
- Click **Undo** to revert the data to its original state. A message is displayed confirming that you want to cancel your changes.
    - Click **OK** to cancel your requested changes.
    - Otherwise, click **Cancel** to close the message without changing your request.
- If the fields are not automatically updated, an email message is sent to the applicable approver prompting them to approve the submitted changes.
- You will receive an automatic reply email containing the changes and informing you that the changes are pending approval.

❑ To delete information, delete the data in the **New** column and click **Save**.

❑ If a change is made more than once for the same field, the most recent change overrides the previous one.

❑ Some fields may require you to submit documentation to your employer. If documentation is required, the fields are identified in the automatic reply email message.

1. Update demographic information.

    ❑ Under **Legal Name**:

Field	Description
Title	Click ⌄ to select your legal title. If this field is not required by the LEA, you can leave it blank.
Last	Type your 25-character maximum last name. This field is required.
First	Type your 17-character maximum first name. This field is required.
Middle	Type your 14-character maximum middle name.
Generation	Click ⌄ to select your generation code.

    ❑ Under **Marital Status**:

Local	Click ⌄ to select your marital status.

    ❑ Under **Driver's License**:

Number	Type your driver's license number. The field can be a maximum of 19 characters.

State	Click ⌄ to select the two-character abbreviation of the state in which you hold a driver's license.

❑ Under **Restriction Codes**:

Local	Click ⌄ to select the code that indicates whether to restrict your email address, phone number, and street address from local distribution.
Public	Click ⌄ to select the code that indicates whether to restrict your email address, phone number, and street address from public distribution.

❑ Under **Email**:

When an email address is updated, email messages are sent to both the old and new email addresses notifying you of the change.

Work E-mail Address	Type your work email address. The field can be a maximum of 45 characters.
Verify E-mail Address	Type the same address that you entered in the previous **Work E-mail Address** field.
Home E-mail Address	Type your home email address. The field can be a maximum of 45 characters.
Verify E-mail Address	Type the same address that you entered in the previous **Home E-mail Address** field.

❑ Under **Emergency Contact Information**:

Name	Type the name of the person to contact in case of an emergency. The field can be a maximum of 26 characters.
Phone Number	Type the three-digit area code, seven-digit phone number, and four-digit maximum extension number of your emergency contact.
Relationship	Type the relationship with your emergency contact. The field can be a maximum of 25 characters.
Emergency Notes	Type any important notes that may be pertinent about you in an emergency situation. The field can be a maximum of 25 characters.

❑ Under **Mailing Address**:

Number	Type the street number for your mailing address. The field can be a maximum of eight characters.
Street/P.O. Box	Type the street name or post office box number for your mailing address. The field can be a maximum of 20 characters.
Apt	Type the apartment number for your mailing address. The field can be a maximum of seven characters.
City	Type the name of your city for your mailing address. The field can be a maximum of 17 characters.
State	Click ⌄ to select the two-character abbreviation of your state for your mailing address.
Zip	Type the five-digit zip code for your mailing address.
Zip+4	Type the additional four digits of your zip code.

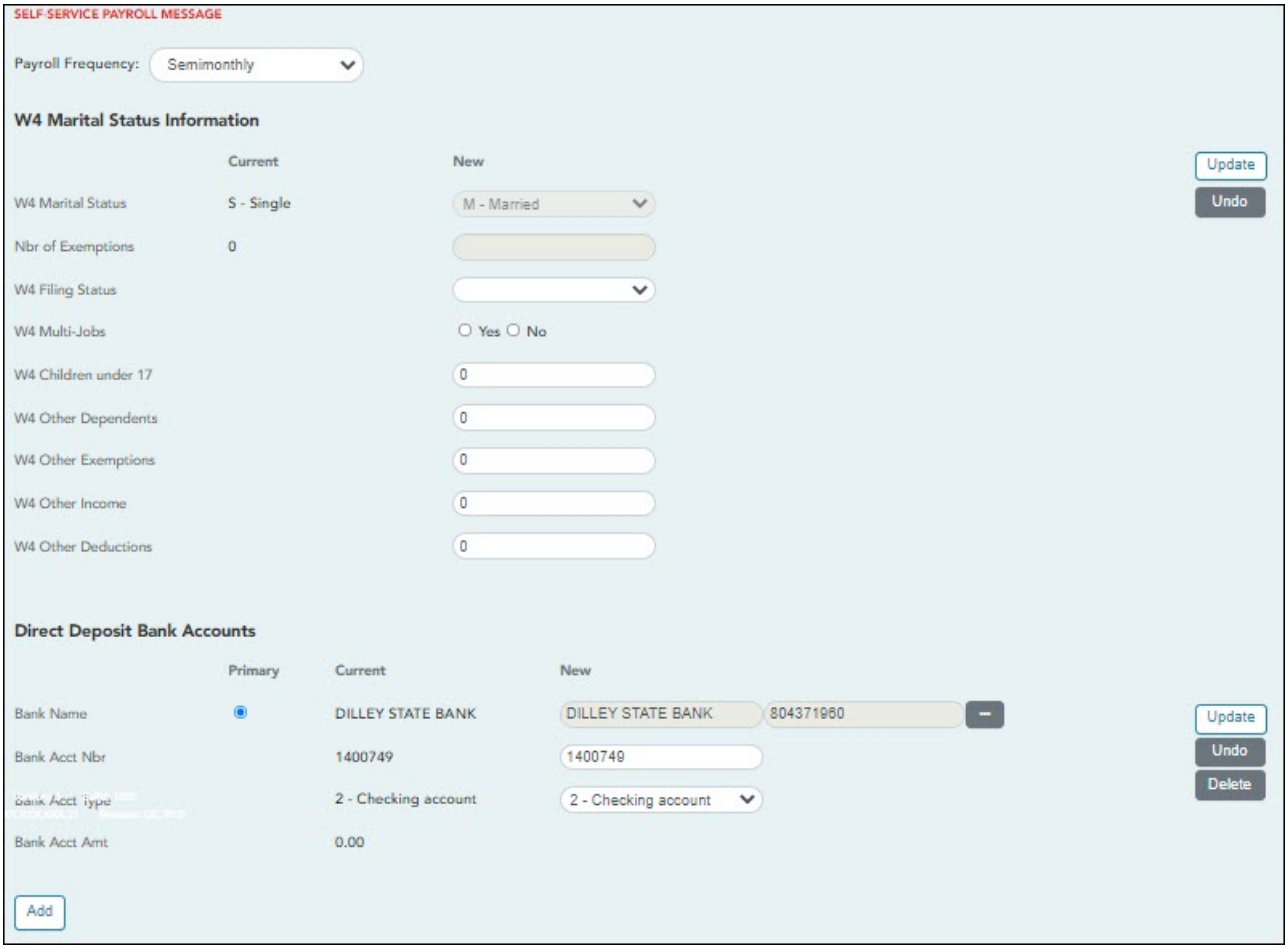
❑ Under **Alternate Address**:

Number	Type the street number for your mailing address. The field can be a maximum of eight characters.
Street/P.O. Box	Type the street name or post office box number for your mailing address. The field can be a maximum of 20 characters.
Apt	Type the apartment number for your mailing address. The field can be a maximum of seven characters.
City	Type the name of your city for your mailing address. The field can be a maximum of 17 characters.
State	Click ⌄ to select the two-character abbreviation of your state for your mailing address.
Zip	Type the five-digit zip code for your mailing address.
Zip+4	Type the additional four digits of your zip code.

❑ Under **Phone Numbers**:

Home	Type the three-digit area code and seven-digit phone number of your home phone.
Cell	Type the three-digit area code and seven-digit phone number of your cell phone.
Business	Type the three-digit area code, seven-digit phone number, and four-digit maximum business extension number of your business phone.

2. Update payroll information.



Payroll Frequency	Click ⌄ to select the pay frequency for which you wish to view or change payroll information.

❑ Under **W4 Marital Status Information**:

- To delete information, delete the data in the **New** column and click **Update**.
- Click **Undo** to return the data to its original state. A message is displayed confirming that you want to cancel your changes.



IMPORTANT: As of 2020, the Form W-4 was updated. Refer to the IRS W-4 Instructions for complete details about completing the W-4 fields. Also, be sure to review Publication 15-T Federal Income Tax Withholding, which contains the withholding tax calculations and the FAQs on the draft 2020 Form W-4 page, which contains helpful information.

Note: Due to IRS Withholding calculation changes, the **W4 Marital Status** and **Nbr of Exemptions** fields are no longer used after December 31, 2019.

Filing Status	Click ⌄ to select a filing status. *H Head of household* *M Married filing jointly* *S Single or Married filing separately*
Multi-Jobs	Select to indicate that there are multiple jobs in the household. Per IRS, complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.
Children under 17	Type the number of children in the household under the age of 17 as of December 31. Per IRS, including these credits will increase your paycheck (i.e., lower the amount withheld from your paycheck by $2,000 per child) and reduce the amount of any refund you may receive when you file your tax return (i.e., lowers your tax return credit).
Other Dependents	Type the number of other dependents in the household.
Other Exemptions	Type the amount of any other exemptions that may affect your federal income tax withholding.
Other Income	Type the amount of any other income that may affect your federal income tax withholding.
Other Deductions	Type the amount of any other deductions that may affect your federal income tax withholding. Per IRS, this is useful if you expect to claim deductions other than the standard deduction and want to reduce your withholding.

Note: For **W-4 Extra withholding**, contact your Human Resources/Payroll department to set up any additional tax you want withheld each pay period.

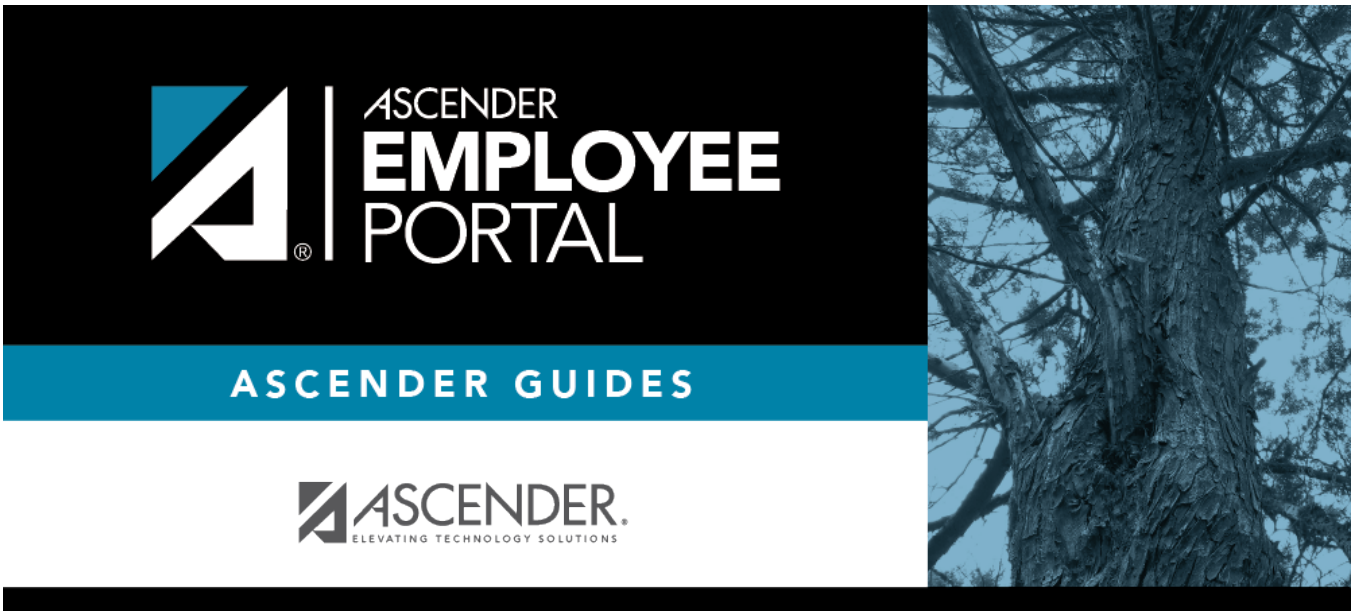
The **IRS Lock-in Letter** field is only displayed if the IRS has determined that you do not have sufficient withholding and a Lock-in Letter has been issued and updated on your pay info record in ASCENDER. For more information about the IRS Lock-in Letter, visit the IRS website. If you have questions, contact your Human Resources/Payroll department.

❑ Under **Direct Deposit Bank Accounts**:

- Click **Add** to add a new financial institution to have your paycheck directly deposited.
- Click **Delete** to delete a financial institution from your record.
- To delete information, delete the data in the **New** column and click **Update**.
- Click **Undo** to return the data to its original state. A message is displayed confirming that you want to cancel your changes.

Note: The number of direct deposit accounts is determined by the LEA. If the LEA only allows one direct deposit bank and one already exists, you will not be allowed to enter and save a second one unless you delete the first one. If the LEA allows zero direct deposit banks and you have one or more, the banks will remain until you make a change. Once you attempt to make a change to the bank, the system will not allow you to save the change.

Primary	Select to indicate whether the bank account is the primary account for your paycheck to be directly deposited. Only one account can be selected as the primary account.
Bank	Click ⌄ to select a bank. A window opens with a list of all available bank names and their respective routing numbers. Click the routing number to select a bank, the bank name and routing number are displayed.
Bank Acct Nbr	Type the bank account number associated with the bank code. The field can be a maximum of 17 characters. This account number is used for the direct deposit of your paycheck. This account number must be associated with the bank name entered in the **Bank** field.
Bank Acct Type	Click ⌄ to select the code to indicate the account type (e.g., checking or savings
Bank Acct Amt	Type the amount to be deposited into the account at the bank indicated. The primary account displays a blank account amount. All secondary accounts must contain an amount. Those amounts are distributed, and the remainder of the paycheck will be sent to the primary account. The bank account amount cannot exceed 9,999,999.99.


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