



ASCENDER

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ASCENDER Release 5.0.0400

NEW: SSA Fiscal Agent Management

The new SSA Fiscal Agent Management feature provides fiscal agents a more efficient way to handle grant budget amendments and reimbursement requests from SSA members. ESCs and LEAs can both be fiscal agents. When both entities use ASCENDER, this feature allows for a seamless exchange of electronic budget amendments, reimbursement requests, approvals, and payments.

Grants and Projects > Tables > SSA Grants > Grant Types

☐ Added this tab to allow fiscal agents to maintain a list of grant types and descriptions, which can be used to facilitate the appropriate workflows and member notifications for each grant type.

The screenshot displays the 'Grant Types' tab within the 'SSA Grants' section of the ASCENDER application. The interface includes a green header bar with navigation links: 'Tables > SSA Grants' and 'Grants And Projects'. Below the header, there is a 'Save' button. The main content area has two tabs: 'GRANT TYPES' (selected) and 'PAYMENT DATES'. Under 'GRANT TYPES', there is a 'Start At:' input field and a 'Retrieve' button. Below this, there is a table with columns: 'Delete', 'Grant Type', 'Description', 'Grant Amount', and 'Status'. The 'Delete' column contains a trash icon. The 'Grant Type' and 'Description' columns have input fields. The 'Grant Amount' column has a search icon. The 'Status' column has a dropdown menu with 'Active' selected. At the bottom, there are pagination controls: 'First', '<', '>', '/ 0', and 'Last'. An 'Add' button with a plus icon is also present.

Grants and Projects > Tables > SSA Grants > Payment Dates

☐ Added this tab to allow fiscal agents to maintain a list of cut-off dates and expected payment dates for each grant type per member.

Tables > SSA Grants Grants And

Save Print

GRANT TYPES PAYMENT DATES

Grant Type: Retrieve

Delete	Cut Off Date	Payment Date
No Rows		

Grants and Projects > Tables > SSA Approval Path

☐ Added this page to create and maintain the sequence or hierarchy of approvers for member grant budget revision requests and reimbursement requests.

Tables > SSA Approval Path Grants And Projects

Save

Grant Type: Retrieve

Reminder Days:

****Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. ****

WARNING
Changing the approval path will update all pending requests for the selected Workflow Grant Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

Grant Type:

Approver	Email Opt-Out
No Rows	

**** DRAG-AND-DROP ****
Press and hold down the left mouse button on the desired row to "Grab" it. "Drag" the row to the desired location. "Drop" the row by releasing the mouse button.

Grants and Projects > Tables > SSA Alternate Approvers

☐ Added this page to assign alternate approvers to approvers who are unable to perform their assigned approval duties during a specified timeframe for member grant budget revision requests and reimbursement requests.

Tables > SSA Alternate Approvers
 Grants And

Grant Type:

Grant Type:

Clear	Approver Emp Nbr	Approver Name	Use Alternate	Alternate Emp Nbr	Alternate Approver Name	From Date	To Date
No Rows							

Grants and Projects > Tables > SSA Members > Member Information

☐ Added this tab to allow fiscal agents to maintain member data records.

Tables > SSA Members
 Grants And Projects

Member:

MEMBER INFORMATION

BANK CODE

Member Information:

County District Nbr:
Member Name:

Region:
Vendor:

Status:

Main Contact:

Contact Name:

E-mail:

Title
First
Last

Grants and Projects > Maintenance > Member Grants > Grant Maintenance

☐ Added this tab to allow fiscal agents to view and maintain various details related to a specified grant year, ID, type, or member (county district) record.

Home Maintenance > Member Grants
 Grants And

Year: Grant ID:

GRANT MAINTENANCE

OBJECT MAINTENANCE

Year: Grant ID:

Member: Status:

Grant Type:

Expense Account:

Fund

Func

Obj

Sobj

Org

-----Prog-----

Dates

Begin Date:

End Date:

Reserve

Reserved Percent:

Reserved Amount:

Final Report

Due Date:

Processed Indicator: ☐

Summary

Total Award: 0.00

Reimbursements: 0.00

Pending Reimbursements: 0.00

Eligible Remaining: 0.00

Matching Funds: 0.00

Transactions

Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Payment Date
No Rows							

Grants and Projects > Maintenance > Member Grants > Object Maintenance

☐ Added this tab to allow fiscal agents to add budget details allocated by object class for a specified year and grant ID.

Maintenance > Member Grants Grants A

Save Add

Year: Grant ID: Retrieve Directory Documents

GRANT MAINTENANCE **OBJECT MAINTENANCE**

Year: Grant ID: Member:

Object	Total Award	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds	Over Expend %
61XX	0.00	0.00	0.00	0.00	0.00	0%
62XX	0.00	0.00	0.00	0.00	0.00	0%
63XX	0.00	0.00	0.00	0.00	0.00	0%
64XX	0.00	0.00	0.00	0.00	0.00	0%
65XX	0.00	0.00	0.00	0.00	0.00	0%
66XX	0.00	0.00	0.00	0.00	0.00	0%
Total:	0.00	0.00	0.00	0.00	0.00	

NEW: Travel Reimbursement

District Administration > Maintenance > User Profiles > Accounts

☐ Added the **TRAVEL** check box to the list of processes. If **Travel** is selected, the **Travel Request** application is displayed under APPS on the User Accounts Validation Report next to the associated account code(s).

Maintenance > User Profiles District Administration

Save

ALCARAZ, AIDE XTRA PAY/OT (002808) Retrieve User Lookup User Add User Delete User Remove Process

ACCOUNTS PERMISSIONS PURCHASING PERMISSIONS PURCHASING ADDRESSES PURCHASING REQUESTORS PURCHASING RESTRICT CAMPUS/DEPT

Validation Report

Current User: ALCARAZ, AIDE XTRA PAY/OT

Delete	Fund	Func	Obj	Sobj	Org	Fscl Yr	Pgm	Ed Span	Proj Dtl	AR	BAR	BUD	FIN	PUR	TRAVEL	WHSE	RESTOCK
	XXX	XX	XXXX	XX	XXX	X	XX	X	XX	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First / 1 Last

[Chart of Accounts](#) [Dup From Existing](#)

☐ Removed the **Account Description** column.

☐ Removed the **Refresh Description** link as it is no longer applicable.

District Administration > Maintenance > User Profiles > Permissions

☐ Added the **Travel Global Approver** check box to the Finance section allowing users to view all travel reimbursement records.

The screenshot displays the 'Permissions' configuration page for a user. At the top, there is a green header bar with a home icon, the breadcrumb 'Maintenance > User Profiles', and a dropdown menu labeled 'District Admin'. Below the header, a 'Save' button is visible. A search bar contains the text 'ALCARAZ, AIDE XTRA PAY/OT (002808)', followed by buttons for 'Retrieve User', 'Lookup User', 'Add User', and 'Delete User'. A horizontal menu below the search bar includes 'ACCOUNTS', 'PERMISSIONS' (which is underlined), 'PURCHASING PERMISSIONS', 'PURCHASING ADDRESSES', 'PURCHASING REQUESTORS', and 'PURCHASING...'. A 'Print' button is located below the menu. The main content area is divided into several sections, each with a title and a list of permissions with checkboxes:

- Accounts Receivable**: Global Access ☐
- Budget Amendment Requests**:
 - Allow Account Creation ☐
 - Allow Multiple Functions on Expenditure Accounts ☐
 - Global Access ☐
- Finance**:
 - Allow JV Account Creation ☐
 - Post to Locked Accounting Period ☐
 - Travel Global Approver** ☐ (This checkbox is circled in red in the original image)
- Restock / Warehouse Requisition**: Global Access ☐

District Administration > Reports > User Profile Report

☐ Modified the report to include the new **Finance Travel Global Approver** check box.

Date Run:		User Profile		Program: DA00001	
Cntry Dist:		ISD		Page 1 of 1	

AIDE XTRA PAY/OT ALCARAZ

Global Access	Over-Ride	Over-Expend/Pct	Req Max	YTD Amt	YTD Max	Bundle Requisitions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0 %	0.00	0.00	0.00	<input type="checkbox"/>

No Requestors Data Found No Purchasing Restrict Camp/Dept Found

No Receiving Addresses Data Found

No Purchasing Credit Cards Data Found

Accts Recv
Global Access

☐

BAR Allow Account Creation	BAR Allow Multiple Functions on Expenditure Accounts	BAR Global Access
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finance Allow JV Account Creation	Finance Post to locked Accounting	Finance Travel Global Approver
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Restock/Warehouse Requisition
Global Access

☐

User Profile Accounts

BUD - XXX-XX-XXXX-XX-XX-XXXXXX

FIN - XXX-XX-XXXX-XX-XX-XXXXXX

PUR - XXX-XX-XXXX-XX-XX-XXXXXX

End of Report

Payroll > Tables > District EP Options

☐ Added the **Travel Reimbursement Request** check box under **Enable** and **Messages**. This option allows users to access the Travel Reimbursement Request feature in EmployeePortal.



EmployeePortal

Update (ASCENDER 5.0.0500)



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