



ASCENDER

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MemberPortal

The ASCENDER MemberPortal is now available. The MemberPortal allows SSA members to submit grant budget revision requests and reimbursement requests to their respective fiscal agents. This functionality provides fiscal agents a more efficient way to manage grant budget amounts and payments.

[Business Known Issues](#)

[Phase 1: WorkJournal](#)

Phase 1: WorkJournal

Personnel > Tables > Salaries > Extra Duty & Salaries NYR > Extra Duty

☐ Added the **Use for ST OT** and **Display in WJ** check boxes to identify which extra duties will use standard overtime rates and be displayed for the WorkJournal feature in EmployeePortal. These fields are only enabled for G-type and S-type extra duty codes.

☐ Added the functionality to freeze the **Delete**, **Code**, and **Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY **EXTRA DUTY** FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
Pay Acty: All
Wholly Sep: All

Retrieve Print

Delete	Code	Description	Amount	Include in Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ
	01	1/8 Sal X Period	0.00	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	02	ECHS Dean Sti	5,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	05	HS SUBS COMP ED	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	06	MS SUB REG	12,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	07	MS SUB SP ED	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	08	MS SUB COMP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	09	EL SUBS REG	15,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	10	EL SUBS G/T	10.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	11	EL SUBS SP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	12	EL SUBS COMP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	13	EL SUBS ESL/BI	500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	14	SPLMT WEB MSTR	0.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	17	SPLMT SP ED	3,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	19	SPLMT ESL	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	21	SPLMT, GT	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

First 1 / 9 Last Add

Tables > Salaries NYR Personnel

Save

LOCAL ANNUAL HOURLY/DAILY **EXTRA DUTY** STATE MIN SUBSTITUTE MIDPOINT WORKERS' COMP

Records
Pay Acty: All
Wholly Sep: All

Retrieve

Modify
☒ By Percent
☐ By Dollar Amt

Salary
Amount: 0.00 %

Default Print

Delete	Code	Description	Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ	Amount	% Increase	New Amount
	01	1/8 Sat X Period			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
	02	ECHS Dean Sti			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5,000.00	0.00	5,000.00
	05	HS SUBS COMP ED			<input type="checkbox"/>	<input type="checkbox"/>	1,000.00	0.00	1,000.00

Personnel > Tables > Job/Contract > Job Codes & Job/Contract NYR > Job Codes

☐ Added the **Time Option**, **Pay Type 2 Dock**, and **Auto Lunch** columns to identify how employees with certain job codes enter their time and how their time is calculated for the WorkJournal feature in EmployeePortal.

❑ Added the functionality to freeze the **Delete**, **Job Code**, and **Job Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

Tables > Job/Contract NYR Personnel

Save

JOB CODES

Retrieve Print

Delete	Job Code	Job Description	Workers' Comp Code	FTE Hrs	No FTE	Time Option	Pay Type 2 Dock	Auto Lunch
	0000	SUBSTITUTE TEACHER		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0020	HOURLY HOLIDAY PAY	-MAINT/CAFE 0.023622	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0100	SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0101	INTERIM SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0113	ASSISTANT SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0115	BUSINESS MANAGER		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0116	CURRICULUM DIRECTOR		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0120	ADMINISTRATIVE ASST.	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0121	DIRECTOR SPECIAL PROGRAM	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0122	DIRECTOR, FOOD SERVICES		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0125	DIRECTOR, SPECIAL EDUCATION		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0128	FACILITATOR/DAEP		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0129	ADMIN COM ED & ATT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0130	OCS/DAEP TCHR	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	0133	SUPERVISOR, VOC EDUCATION		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0

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Personnel > Tables > WorkJournal > Options

❑ Added this tab to set up WorkJournal options such as the employee work week and time conversion tables to be used for the WorkJournal feature in EmployeePortal.

Tables > WorkJournal

Personnel

Save

OPTIONS

ADMIN

Retrieve

Print

Work Week Start Day: Sunday

Work Entry Cutoff Days: 0

Reminder Days: 0

Enable WorkJournal Time for Pay Types:

Pay Type 2 Non-contracted Employee: ☐

Pay Type 3 Hourly Employee: ☐

Time Conversion:

Frequency: 4 - Biweekly CYR

Delete

Up to Minute

Percent of Hour

0

0 %

+

Add

Personnel > Tables > WorkJournal > Admin

☐ Added this tab to manage a list of WorkJournal admin users who will have access to manage WorkJournal features in EmployeePortal.

Tables > WorkJournal

Personnel

Save

OPTIONS

ADMIN

Retrieve

Print

Delete	Employee Nbr	Employee Name	Primary Campus	Primary Dept
	000001 ::		001	
	000012 ::		001	
	000002 ::		041	
	000126 ::		041	
	::			

First

◀

1: 001 - 041

/ 1

▶

Last

+

Add

Phase 2: SSA Fiscal Agent Management

Phase 2: SSA Fiscal Agent Management

Grants and Projects > Maintenance > Approval Dashboard

□ Added this page to allow signed-on approvers to view a list of all member grant budget revision requests and reimbursement requests awaiting approval for a year/grant type. Approvers can elect to approve all requests, individual requests, or return all requests or individual requests. Additionally, approvers can update the details in an individual request prior to approving or returning the request.

The screenshot shows the 'Maintenance > Approval Dashboard' interface. At the top, there is a green header bar with a home icon and the text 'Maintenance > Approval Dashboard' on the left, and a dropdown menu labeled 'Grants And' on the right. Below the header, there are two buttons: 'Approve' and 'Return'. Underneath these buttons, there are input fields for 'Year:' and 'Grant Type:', followed by a vertical ellipsis icon and a dropdown menu currently set to 'ALL'. A 'Retrieve' button is located to the right of the dropdown. Below these filters, the text 'Year: All Grant Type: All Transaction Type: All' is displayed. The main content area is titled 'Transactions Pending Approval'. It features a 'Select All' checkbox and a table with columns: 'Detail', 'Doc', 'Member', 'Year', 'Grant ID', 'Transaction Date' (with a downward arrow icon), 'Type', 'Amount', and 'Final Rpt'. The table currently shows 'No Rows'.

Grants and Projects > Utilities > Grant Payments > Print Checks

□ Added this tab to process member reimbursement request payments to the member's vendor via check or electronic funds transfer, and then post the transactions to Finance.

The screenshot shows the 'Utilities > Grant Payments' interface. The top green header bar contains a home icon, the text 'Utilities > Grant Payments', and a dropdown menu labeled 'Grants And'. Below the header, there are three tabs: 'PRINT CHECKS' (which is active and underlined), 'CREATE EFT FILE', and 'REVISE EFT FILE'. The main content area for the 'PRINT CHECKS' tab includes a section titled 'Check Options' with three input fields: 'Beginning Check Nbr:', 'Beginning EFT Reference Number: E', and 'Check Date:'. To the right of these fields is an 'Execute' button.

Grants and Projects > Utilities > Grant Payments > Create EFT File

□ Added this tab to create an EFT file to send to the bank for electronic funds transfer of grant

reimbursement payments.

The screenshot shows the 'Utilities > Grant Payments' interface. At the top, there's a green header with a home icon and the text 'Utilities > Grant Payments'. On the right, there's a dropdown menu labeled 'Grants And'. Below the header, there are three tabs: 'PRINT CHECKS', 'CREATE EFT FILE' (which is selected and underlined), and 'REVISE EFT FILE'. Under the 'CREATE EFT FILE' tab, there's a 'File Type' section with two radio buttons: 'Grant Payments' (selected) and 'Pre-Note'. To the right of this is an 'Effective Date' field with a date picker showing '--'. A green button labeled 'Create EFT File' is to the right of the date field. Below this, there's a table with columns: 'Select', 'Check Date', 'Check Processing Date', 'From EFT Nbr', and 'To EFT Nbr'. The table is currently empty, showing 'No Rows'.

Grants and Projects > Utilities > Grant Payments > Revise EFT File

☐ Added this tab to edit an existing EFT file prior to sending the file to the bank for electronic funds transfer of grant reimbursement payments.

The screenshot shows the 'Utilities > Grant Payments' interface with the 'REVISE EFT FILE' tab selected. At the top, there's a green header with a home icon and the text 'Utilities > Grant Payments'. On the right, there's a dropdown menu labeled 'Grants And'. Below the header, there are three tabs: 'PRINT CHECKS', 'CREATE EFT FILE', and 'REVISE EFT FILE' (which is selected and underlined). Below the tabs, there's a red warning message: 'WARNING: Ensure that you are entering correct information. Any information entered will be processed.' Below the warning, there's a 'Choose File' button, a text field showing 'No file chosen', a 'Retrieve File' button, and a 'Process File' button. Below this, there's a 'Selected File:' label. Below the label, there's a table with columns: 'Delete', 'Record Cd', 'Account Type', 'Run Type', 'Transit Route', 'Bank Account Nbr', 'Bank Account Amt', 'Vendor Nbr', and 'Vendor Name'. The table is currently empty, showing 'No Rows'. At the bottom right of the table, there's a green button with a plus icon and the text 'Add'.

Grants and Projects > Reports > SSA Grant Reports > GP1000 - Grant Summary Status Report

☐ Added this report to provide a summary of grant status information.

Reports > SSA Grant Reports > Grant Summary Status Report

Grants And Projects

Preview PDF CSV Clear Options

Grants And Projects

GP1000 - Grant Summary Status Report

GP1000-Grant Summary Status Report

Parameter Description	Value
Sort By Grant (T) or Member (M) or Grant Year (Y)	
Select Status for Grant Year & Grant ID Active (A), Closed (C), Cancelled (X) or Blank for ALL	
Select Grant Year (YYYY) or Blank for ALL	
Select Grant Type(s) or Blank for ALL	
Select Member(s) or Blank for ALL	

Phase 2: Travel Reimbursement Requests

Phase 2: Travel Reimbursement Requests

Finance > Tables > District Finance Options > Accounting Periods

☐ Added the **Travel Accounting Period** field to accommodate the travel functionality. This accounting period is incremented after completing the EOM and Fiscal Year Close processes.

Tables > District Finance Options

Finance

Save

File ID: C Account Period: 04

FINANCE OPTIONS ACCOUNTING PERIODS CLEARING FUND MAINTENANCE

Retrieve Print

Current (Open) Accounting Period: 04

Next Accounting Posting Period: 04

Purchasing Accounting Period: 04

Accounts Receivable Period: 04

Travel Accounting Period: 04

Lock Current Accounting Period: ☐

Warehouse ID	Description	Accounting Period
1	Supplies	04

Bank Reconciliation > Tables > Bank Account Fund Groups > Bank Account Group

- ☐ Renamed the **Extract HR** column to **Extract Payroll**.
-

Finance > Maintenance > Pending Payables

- ☐ Modified the **Invoice Nbr** field to increase the number of characters allowed from 10 to 15.
-

Finance > Maintenance > EFT Processing

- ☐ Modified the program to improve the amount of time it takes to load/retrieve data.
-

Payroll > Payroll Processing > Run Payroll

- ☐ Modified payroll calculations to calculate 403B FICA Alternative accruals.
-

Payroll > Payroll Processing > Special Adjustments

- ☐ Modified the program to allow employee and employer 403B FICA Alternative Annuity amounts to be interfaced. Also, added the applicable columns to the necessary reports.
-

Payroll > Payroll Processing > Special Adjustments > Expense Only

- ☐ Renamed the **Recalc Grants** button to **Recalc Grts/403B**. Also, added the **Emplr 403B FICA Contrib** field to the list of expenses. This field cannot be modified and is calculated based on the expense pay entered if the original 403B FICA contribution was not zero.
-

Payroll > Payroll Processing > Special Adjustments > Accruals Only

- ☐ Added the **Accru Emplr 403B FICA Contr** field to the list of expenses.
-

Payroll > Utilities > Zero School YTD Accruals

☐ Modified the program to allow employer 403B FICA Alternative Annuity amounts to be zeroed out and interfaced to Finance.

Payroll > Utilities > Payroll Accrual Variance Extract

☐ Modified the program to calculate and interface employer accrual variance 403B FICA Alternative Annuity amounts.

Payroll > Reports > Year To Date Reports > HRS3650 - YTD Special Adjustment Report

☐ Modified the program to include employer 403B FICA Alternative Annuity amount special adjustments.

Personnel > Utilities > Mass Update > Employee

☐ Corrected the issue that caused employee years of experience to be incremented even though the re-employment date was greater than the date in the **Employment Date<** field.

☐ Renamed the **Increment** section to **Update Experience**, and added the **Increment** and **Decrement** check boxes to allow the selected years of employee experience to either be increased or decreased by one.

Position Management > Utilities > Salary Simulation (Next Year)

☐ Corrected the issue that prevented supplemental transactions from being included in the stat min calculations when the **Acct Type** is set to *S Supplemental Pay* and **Exp 373** is selected.

☐ Modified PMIS salary simulations and reports to include 403B FICA Alternative contribution calculations.



Back Cover