


# ASCENDER - New Employee Setup

# Table of Contents

**ASCENDER - New Employee Setup** ..... 1

# ASCENDER - New Employee Setup

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The purpose of this document is to guide you through the process of setting up a new hire in ASCENDER. The tasks to create a new employee record are done in both Payroll and Personnel.

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

Review the following information and/or complete the listed steps before creating a new employee record.

### Review terms:

The following terms are used throughout this document.

| Term | Description |
|---|---|
| **Payroll frequency** | The amount of time between an employee's paydays. There are three pay frequency options:<br><br>**4 biweekly** - employee receives pay every two weeks<br>**5 semimonthly** - employee receives pay twice a month<br>**6 monthly** - employee receives pay once a month<br><br>Each pay frequency exists in the current and next year payroll periods.<br><br>You must log on to a pay frequency to view the associated payroll records. |
| **Pay Types** | **pay type 1** - contracted employee<br>**pay type 2** - non-contracted employee<br>**pay type 3** - hourly employee<br>**pay type 4** - substitute |

Although all of the fields on the Demographic and Staff Job/Pay Data tabs are not required to create a

new employee record, some of the fields are required and used for reporting to the following agencies.

| Agency | Reporting Type |
|---|---|
| **Texas Education Agency (TEA)** | PEIMS data reporting |
| **Teacher Retirement System (TRS)** | TRS reporting |
| **Internal Revenue Service (IRS)** | Tax reporting |
| **Social Security Administration (SSA)** | Social Security retirement, survivors, and disability insurance reporting |
| **Texas Workforce Commission (TWC)** | Unemployment reporting |

❑ Log on to the TRS Reporting Entity Portal to verify the employee's TRS status.

- Verify if the new member contribution is due.
- Verify if the employee is a TRS retiree. If so, verify the retiree's retirement date to determine if any surcharges are due. Use this information to correctly identify the employee as a retiree on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab and charge the Retiree Care Surcharge, if applicable.

❑ Obtain the employee's contract or employee agreement to reference important details needed to create the employee's record.

❑ If the employee was previously employed by another LEA and you are waiting for the service record originals via mail, you may want to try to obtain a service record copy via fax in order to continue with the process.

❑ Follow your LEA procedures to obtain employee Unique ID numbers through TEA's Texas Student Data System (TSDS).

Review the required TRS Reporting Data Fields. (prints separately)

Review the FICA/Medicare - Quick Reference. (prints separately)

New Employee Document Checklist

## New Employee Document Checklist

Review the following information to identify the needed documents before and upon hiring a new employee.

This checklist serves only as a reference since document requirements can vary based on the LEA. **It is important** to verify the documentation requirements specific to your LEA.

## Before employment:

| Employment Type | Document Type (R - Required/C - Confidential) |
|---|---|
| **All** | ❑ Application<br>❑ References<br>❑ Criminal history check (R, C) |
| **Professional employees** | ❑ Credentials (valid Texas certificate, permit, or license) (R)<br>❑ Service record and any required attachments (R)<br>❑ Official college transcripts |
| **Educational aides** | ❑ Certification<br>❑ Official college transcript or NCLB assessment of skills (R) |
| **Bus Drivers (includes all employees required to have a CDL)** | ❑ Proof that applicant is at least 18 years of age (R)<br>❑ Preemployment drug-screening test (R, C)<br>❑ Post-offer employment physical (R, C)<br>❑ Proof of valid driver's license and proof of safe driving record (R)<br>❑ Valid driver training certificate (R)<br>❑ Previous employers' alcohol- and drug-screening test information (R, C) |
| **Police Officers** | ❑ Previous employment information from Texas Commission on Law Enforcement (R) |

## Upon employment:

| Employment Type | Document Type (Required (R)/Confidential (C)) |
|---|---|
| **All** | ❑ District-completed Form I-9 (R)<br>❑ Statement concerning employment in a job not covered by Social Security (R)<br>❑ W-4 Form (R)<br>❑ Benefit enrollment forms<br>❑ Verification of official Social Security number (C)<br>❑ Authorization for Release/Closure of Personal Information (R)<br>❑ Notice of reasonable assurance (noncontract employees only)<br>❑ Notice of Rights and Responsibilities Under the Family and Medical Leave Act (R)<br>❑ Notice of requirements under the Affordable Health Care Act (R)<br>❑ New-hire report for submission to the state (R)<br>❑ Copy of district drug-free workplace policy |
| **Professional** | ❑ Employee-signed receipt for contract and copy of employment policies<br>❑ Teaching schedule or other assignment record<br>❑ Teacher-signed receipt for a copy of TEC Chapter 37, Subchapter A, regarding student discipline and related local board policy |
| **Coaches, Sponsors, and Head Band Directors** | ❑ Professional Acknowledgment Form (R) |
| **Police Officers** | ❑ Appointment of Licensee (Texas Commission on Law Enforcement (TCOLE) Form L-1) (R) |

New Employee Setup - Quick Reference by Pay Type

## Quick Reference by Pay Type

The following chart is used to assist users in setting up new employees by pay type. Click a **Pay Type** column heading to display sample images for each pay type.

Personnel > Maintenance > Employment Info

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

**Key**:
X - Required to save the record.
R - Recommended/required for reporting purposes.
A - Required, if applicable.
O - Optional.

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Employee Status** | X | X | X | X | X | |
| **Highest Degree** | X | X | X | R | A | Reported to TEA. |
| **Percent Day Employed** | X | X | X | X | X | Reported to TEA. |
| **Eligible for Re-hire** | O | O | O | O | O | |
| **Extract ID** | O | O | O | O | O | |
| **Electronic Consent W-2** | O | O | O | O | O | Used by EmployeePortal. |
| **Electronic Consent 1095** | O | O | O | O | O | Used by EmployeePortal. |
| **Original Emp Date OR Latest Re-Employ Date** | R | R | R | R | R | |
| **Retirement Date** | | | | | X | |
| **Take Retiree Surcharge** | | | | | A | Required, if applicable. |
| **NY Take Retiree Surcharge** | | | | | A | Required, if applicable. |
| **Year Round** | O | O | O | O | O | |
| **ERS Retiree Health Current Year Elig** | | | | | A | Required, if applicable. |
| **ERS Retiree Health Next Year Elig** | | | | | A | Required, if applicable. |
| **Sub Type** | | | | X | | |
| **Employment Type** | X | X | X | X | X | Reported to TRS. |
| **Retiree Employment Type** | | | | | X | Reported to TRS. |
| **Years Experience** | R | R | R | | R | Reported to TEA. |
| **Contract Information Class/Term/Year** | O | O | O | | O | |
| **Extended Leave Begin/End** | O | O | O | | | |
| **Termination Date/Reason/Full Semester** | R | R | R | | R | |
| **Grade(s) Taught** | O | O | O | | O | |
| **Fingerprint Status and Fingerprint Dates** | O | O | O | O | O | |

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

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

**Key**:
X - Required to save the record.
R - Recommended/required for reporting purposes.
A - Required, if applicable.
O - Optional.

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Pay Status** | X | X | X | X | X | |
| **Pay Campus** | X | X | X | X | X | |
| **Pay Department** | O | O | O | O | O | |
| **Dock Rate** | O | O | O | O | O | |
| **Tax Exempt** | O | O | O | O | O | |
| **Unemployment Elig** | R | R | R | R | R | Reported to TWC. |
| **FICA Eligibility** | X | X | X | X | X | Review the FICA/Medicare - Quick Reference page for additional details. |
| **W-4 Withholding Certificate** | X | X | X | X | X | |
| **TRS Status** | X | X | X | X | X | |
| **Begin Date** | A | A | A | | | If TRS eligible. |
| **End 90 Day Period** | A | A | A | | | |
| **FSP Staff Salary Data Health Ins Code** | X | X | X | X | X | |
| **FSP Staff Data Code** | A | A | A | A | A | |
| **Extra Duty Pay** | A | A | A | A | A | The Job Info & Distribution tabs must be completed before saving the record. |
| **Bank Info** | A | A | A | A | A | |

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

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

**Key**:
X - Required to save the record.
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A - Required, if applicable.
O - Optional.

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Job Code/ Primary/ % Assigned** | X | X | X | X | X | |
| **Primary Campus** | X | X | X | X | X | |

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Department** | O | O | O | O | O | |
| **Pay Type** | X | X | X | X | X | |
| **Pay Grade/Pay Step/ Sched/ Max Days** | A | A | A | | A | |
| **Hrs Per Day** | O | O | O | O | O | |
| **Incr Pay Step** | O | O | O | O | O | |
| **Total** | X | X | | | A | |
| **Balance** | X | X | | | A | |
| **# of Annual Payments** | X | X | | | A | |
| **Remaining Payments** | X | X | | | A | |
| **# of Months in Contract** | X | X | | | A | |
| **State Min Days** | X | R | | | O | Reported to TRS. |
| **Daily Rate** | X | X | | | A | |
| **Pay Rate** | X | X | X | | A | |
| **Payoff Date** | X | X | | | A | |
| **Wkly Hrs Sched** | R | R | | | | Reported to TRS. |
| **Reg Hrs Worked** | | | O | | | |
| **OVTM Elig** | | R | R | | A | |
| **OVTM Rate** | | R | R | | A | |
| **Hrly Rate** | | R | R | | A | |
| **Exempt Status** | O | | | | O | |
| **EEOC Code** | A | A | A | A | A | |
| **State Step** | X | | | | | Reported to TRS. |
| **Yrs in Career Ladder** | A | | | | | Reported to TRS. |
| **TRS Year** | A | A | A | | | Reported to TRS. |
| **TRS Member Pos** | X | X | X | X | X | Reported to TRS. |
| **Wholly Separate** | A | | | | A | Reported to TRS. |
| **State Min Salary** | X | | | | | Reported to TRS. |
| **% Assigned** | X | | | | | Used in TRS calculations. |
| **Calendar Cd** | O | O | | | O | |
| **Begin Date / End Date / # of Days Empld** | X | X | X | X | X | |
| **Years Job Exp** | O | O | O | O | O | |
| **Local Contract Days** | O | O | O | O | O | |
| **WC Code / WC Ann Pymts / WC Remain** | A | A | A | A | A | |
| **Accrual Code / Accrual Rate** | A | A | | | A | |

Payroll > Maintenance > Staff Job/Pay Data > Distributions

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

**Key**:
X - Required to save the record.
R - Recommended/required for reporting purposes.
A - Required, if applicable.
O - Optional.

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Job Code** | X | X | O | O | O | |
| **Extra Duty Code** | A | A | | | A | |
| **Account Type** | X | X | O | O | O | |
| **Account Code** | X | X | O | O | O | |
| **Amount / Percent** | X | X | O | O | O | |
| **Activity Code** | X | X | O | O | O | |
| **TRS Grant Code** | A | A | | | A | |
| **Workers Comp Code** | A | A | | | A | |
| **Expense 373** | A | | A | | A | Select account(s) for stat min expense. |
| **Employer Contribution** | A | A | A | | A | |
| **Perfomance Pay** | A | A | A | | A | |

Payroll > Maintenance > Staff Job/Pay Data > Deductions

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

**Key**:
X - Required to save the record.
R - Recommended/required for reporting purposes.
A - Required, if applicable.
O - Optional.

| ASCENDER Field | Pay Type 1 | Pay Type 2 | Pay Type 3 | Pay Type 4 | Retiree | Notes |
|---|---|---|---|---|---|---|
| **Deduction Code** | A | A | A | A | A | |
| **Net Amount** | A | A | A | A | A | Employee Share |
| **Emplr Contrib** | A | A | A | A | A | |
| **Remain Pymts** | A | A | A | A | A | |
| **Refund** | A | A | A | A | A | |
| **Café 125** | A | A | A | A | A | Check to tax shelter premiums |
| **Emplr Contrib Factor** | A | A | A | A | A | |
| **TEA Contrib Factor** | A | A | A | A | A | $75 State Health Insurance contribution |


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# Back Cover