Admin Guide: ASCENDER EmployeePortal Setup

Table of Contents

Administrative Guide: ASCENDER EmployeePortal Setup

ASCENDER EmployeePortal provides users with web access to various data inquiries and maintenance features.

EmployeePortal allows users to view their current and historical pay information including calendar year-to-date information, deductions, earnings, leave balances, W-2 information, and 1095 information. And, up to 18 months of check stub information; year-to-date leave earned, leave used, and leave balances (including any unprocessed transactions entered for future payrolls).

In addition, users can create, edit, delete, and submit leave requests. The EmployeePortal also provides a self-service maintenance page allowing users to submit changes to their demographic and payroll information such as changes to an address, withholding and exemption status, and direct deposit settings. Some changes may require additional approval or documentation.

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

Before You Begin

Review the Getting Started document. The Getting Started document that is provided with each software release contains instructions about how the files must be configured and how to modify the properties for EmployeePortal.

EmployeePortal is driven by the settings previously defined by the LEA's administrators. These settings determine the level of access that users have in EmployeePortal.

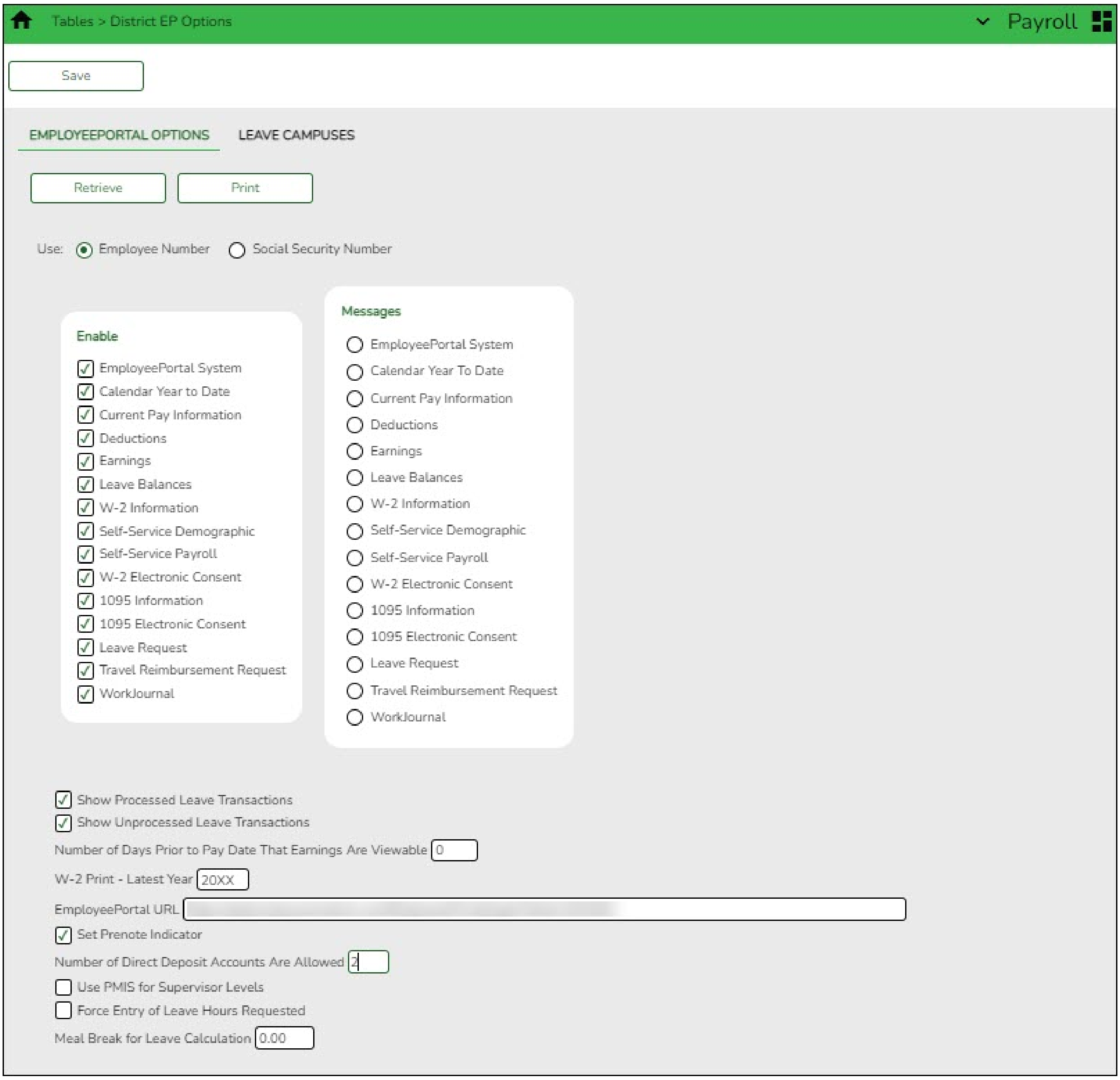
This guide provides the necessary steps to set up the appropriate access to the portal and its various pages. These tasks are managed in the ASCENDER Business Payroll and Personnel applications.

I. Set up EmployeePortal Options

1. Set up district EP options.

   Payroll > Tables > District EP Options > EmployeePortal Options

   Use this page to manage your LEA-wide settings for ASCENDER EmployeePortal. These settings allow you to determine the information and features to which your employees have access in EmployeePortal.



❑ Under **Enable**, select the information or features to enable for your users in EmployeePortal.

Field	**Description**
EmployeePortal System	Select to enable EmployeePortal.
Calendar Year to Date	Select to allow the Calendar Year to Date page to be displayed.
Current Pay Information	Select to allow the Current Pay Information page to be displayed.
Deductions	Select to allow the Deductions page to be displayed.
Earnings	Select to allow the Earnings page to be displayed.
Leave Balances	Select to allow the Leave Balances page to be displayed.
W-2 Information	Select to allow the W-2 Information page to be displayed.

Field	Description
Self-Service Demographic	Select to allow the Self-Service Assignments - Demographic page to be displayed. If selected, use the Personnel > Tables > EP Self-Service Assignments Demographic page to indicate which fields can be updated or viewed on the EmployeePortal Self-Service Profile page. **Note**: If LEAs choose to allow users to change their passwords via the Self-Service menu in EmployeePortal, the **Self-Service Demographic** and/or **Payroll** fields must be selected. If both of these fields are blank, users will not be able to access the Self-Service menu in portal and therefore cannot change their passwords.
Self-Service Payroll	Select to allow the Self-Service Assignments - Payroll page to be displayed. **Note**: If LEAs choose to allow users to change their passwords via the Self-Service menu in EmployeePortal, the **Self-Service Demographic** and/or **Payroll** fields must be selected. If both of these fields are blank, users will not be able to access the Self-Service menu in portal and therefore cannot change their passwords.
W-2 Electronic Consent	Select to allow the **W-2 Consent** button to be displayed. If not selected, W-2 forms are printed for all employees. **Note**: If W-2 Information is selected giving the employee access to the EmployeePortal > Inquiry > W-2 Information page, the **W-2 Consent** button is displayed and enabled on the W-2 Information page whether or not **W-2 Electronic Consent** is selected.
1095 Information	Select to allow the 1095 Information page to be displayed.
1095 Electronic Consent	Select to allow the **1095 Consent** button to be displayed. If not selected, 1095 forms are printed and mailed to all employees. **Note**: If **1095 Information** is selected giving the employee access to the EmployeePortal > Inquiry > 1095 Information page, the **1095 Consent** button is displayed and enabled on the 1095 Information page whether or not **1095 Electronic Consent** is selected.
Leave Request	Select to enable the Leave Request feature.
Travel Reimbursement Request	Select to enable the Travel Reimbursement Request feature.
WorkJournal	Select to enable the WorkJournal feature.

❏ Under **Messages**, you can select one or more of the following pages to display a custom LEA-wide message on the page in EmployeePortal. All users who log on to EmployeePortal and access the page will see the message.

When a field is selected, a text box is displayed allowing you to add, delete, or modify a message. The message can be a maximum of 500 characters and is displayed in red at the top of the page in EmployeePortal.

Calendar Year to Date
Current Pay Information
Deductions

Earnings
Leave Balances
W-2 Information
Self-Service Demographic
Self-Service Payroll
W-2 Electronic Consent
1095 Information
1095 Electronic Consent
Leave Request
Travel Reimbursement Request
WorkJournal

Show Processed Leave Transactions	Select to allow users to view processed leave on the Leave Balances page.
Show Unprocessed Leave Transactions	Select to allow users to view unprocessed leave on the Leave Balances page.
Number of Days Prior to Pay Date That Earnings Are Viewable	Type a three-digit maximum number to indicate the number of days prior to a pay date to display the earnings information on the Earnings page in EmployeePortal. By default, the field is set to 0. If the field is set to 0, the employee can view unlimited earnings information as soon as the earnings are posted. **Example**: If the pay date is 10-31: Type 0 to allow employees to view earnings as soon as they are posted. Type 1 to allow employees to view earnings on 10-30. Type 2 to allow employees to view earnings on 10-29. Type 3 to allow employees to view earnings on 10-28.
W-2 Print - Latest Year	Type the four-digit year of the latest year for which the employees can print an official copy of their W-2. This field should not be updated until the LEA has run and finalized its W-2s. W-2s will be copies and will not be used in lieu of the LEA generating W-2s. W-2s will be printed in the official format (as determined by the IRS) and can be used as the original. The field contains the latest year available to print. If the field is left blank, employees will not have the option to print a copy of any of their W-2s. The earliest available form in the system is 2009 so an earlier year will not be accepted.
EmployeePortal URL	Type the web address for your LEA's EmployeePortal site.
Set Prenote Indicator	Select to indicate if the account is a prenote account. This is for accounts added as a direct deposit in the EmployeePortal payroll information section.

Number of Direct Deposit Accounts Are Allowed	Type a two-digit maximum number to indicate the number of direct deposit accounts allowed by the district. These accounts will be displayed in EmployeePortal. By default, the **Number of Direct Deposit Accounts Are Allowed** field is set to 0. If the **Number of Direct Deposit Accounts Are Allowed** field is set to 0, and the employee does not have any direct deposit accounts in Payroll, the employee will not be allowed to add one through EmployeePortal > Self-Service. If the **Number of Direct Deposit Accounts Are Allowed** field is set to 0, and the employee has one or more direct deposit accounts in Payroll, the employee will not be allowed to add one through EmployeePortal > Self-Service but will be able to modify and delete existing accounts.
Use PMIS for Supervisor Levels	Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request.
Force Entry of Leave Hours Requested	Select to force the employee to enter the number of requested leave hours. If selected, the number of requested leave hours is not automatically calculated.
Meal Break for Leave Calculation	Type the number of hours to be included in the hours per day calculation if a leave request exceeds five hours. An amount must be entered if a meal break is to be subtracted in the hours per day calculation. Valid values are 0.00-9.99.

❏ Click **Save**.

III. Set up Supervisor Profiles

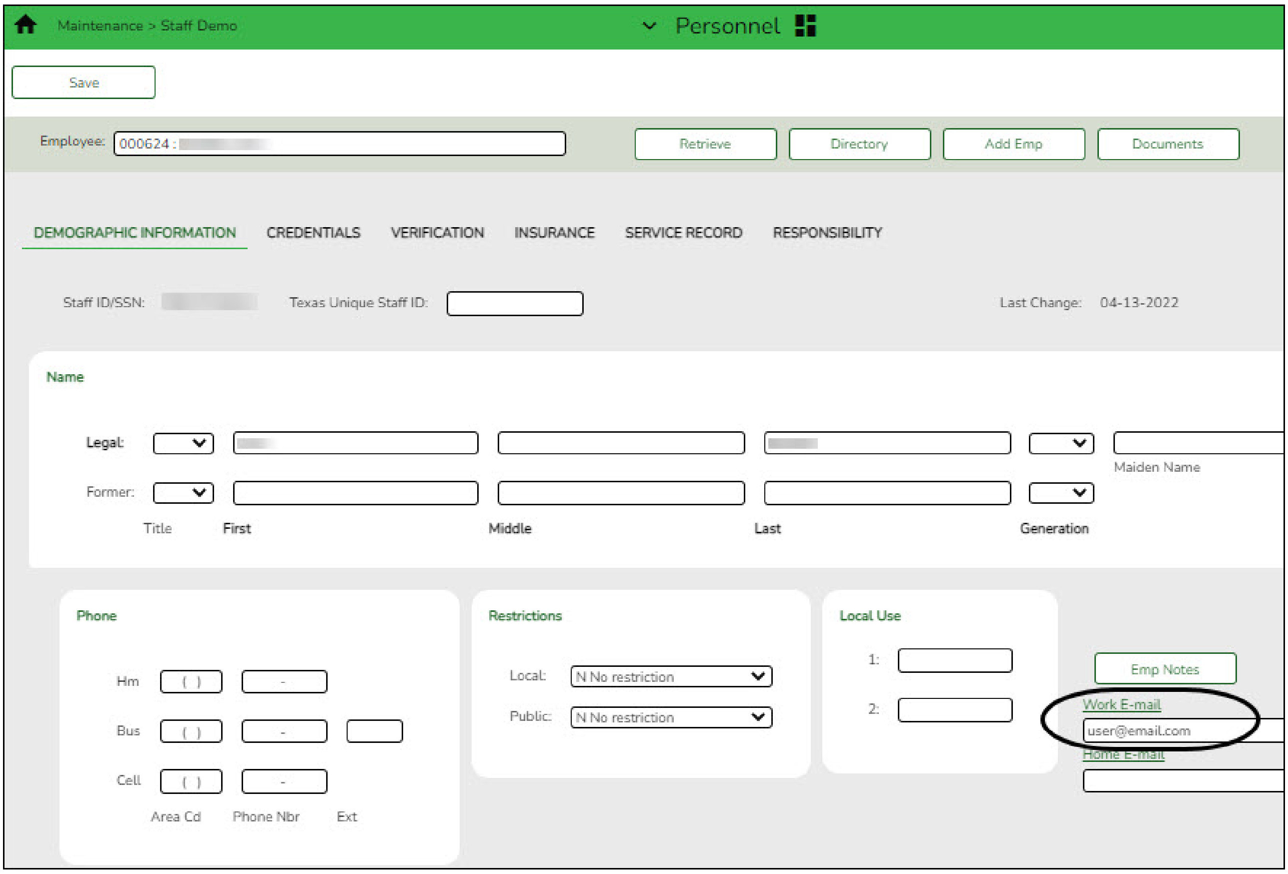
Before an employee can be set up as a supervisor, approver, or temporary approver, the employee must have a security user profile.

1. Create a demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   ❏ Create an employee record. The record cannot be a non-employee record created in District Administration.

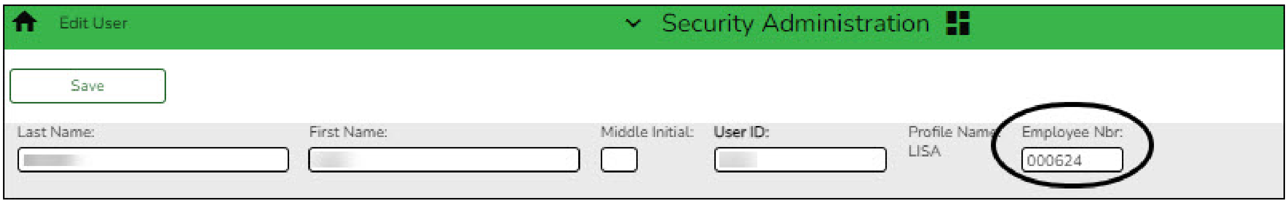
   ❏ Add an email address to the employee record to allow the supervisor or temporary approver to receive automatic reply and workflow emails.



2. Create a security profile.

Security Administration > Manage Users

❑ Update the user's profile with the employee number that was generated on the employee's Personnel demographic record.



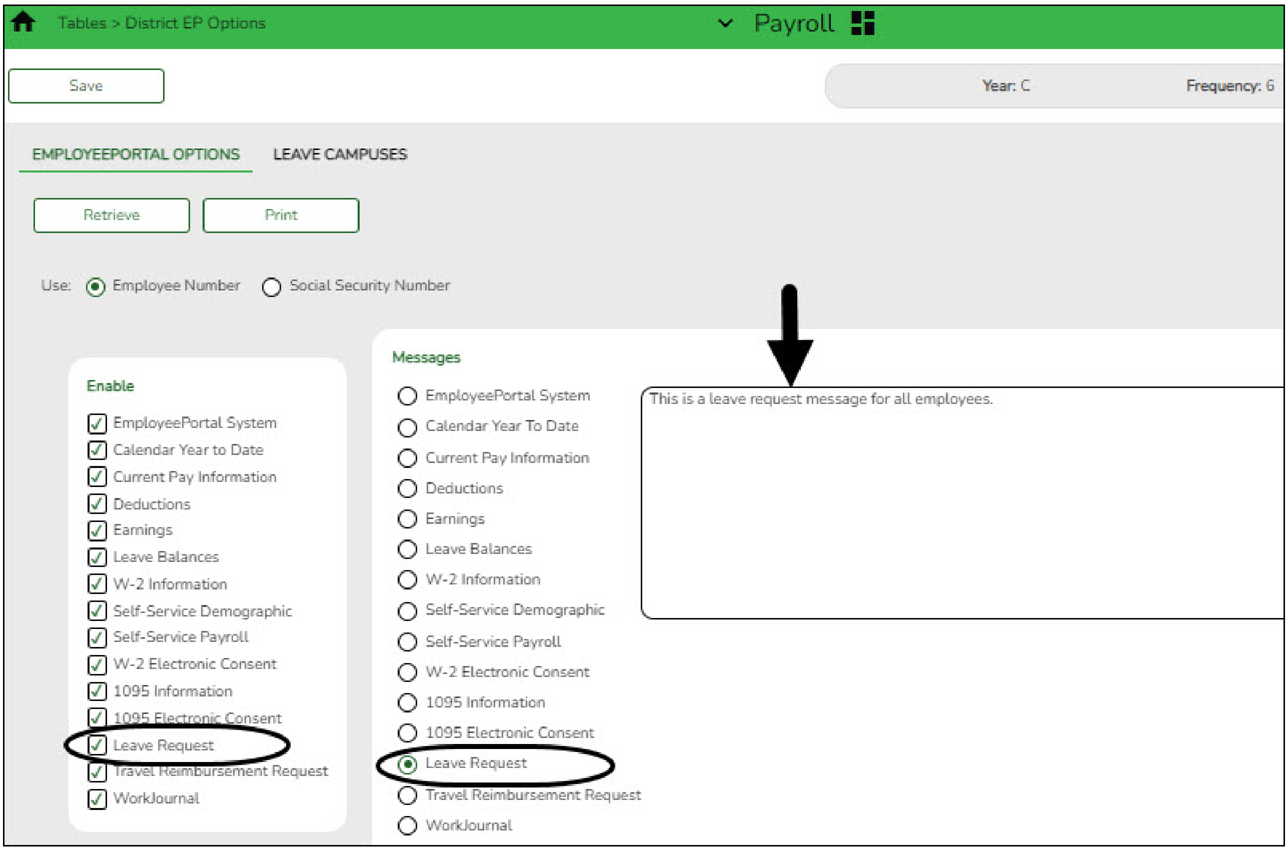
❑ If the employee has an existing user profile, ensure that the profile is active (i.e., not marked as deleted in Security Administration).

IV. Set up the Leave Request Feature

Perform the following tasks to ensure that the leave request feature in EmployeePortal is properly set up and functions as intended for employee and supervisor users.

1. Set up district EP options.

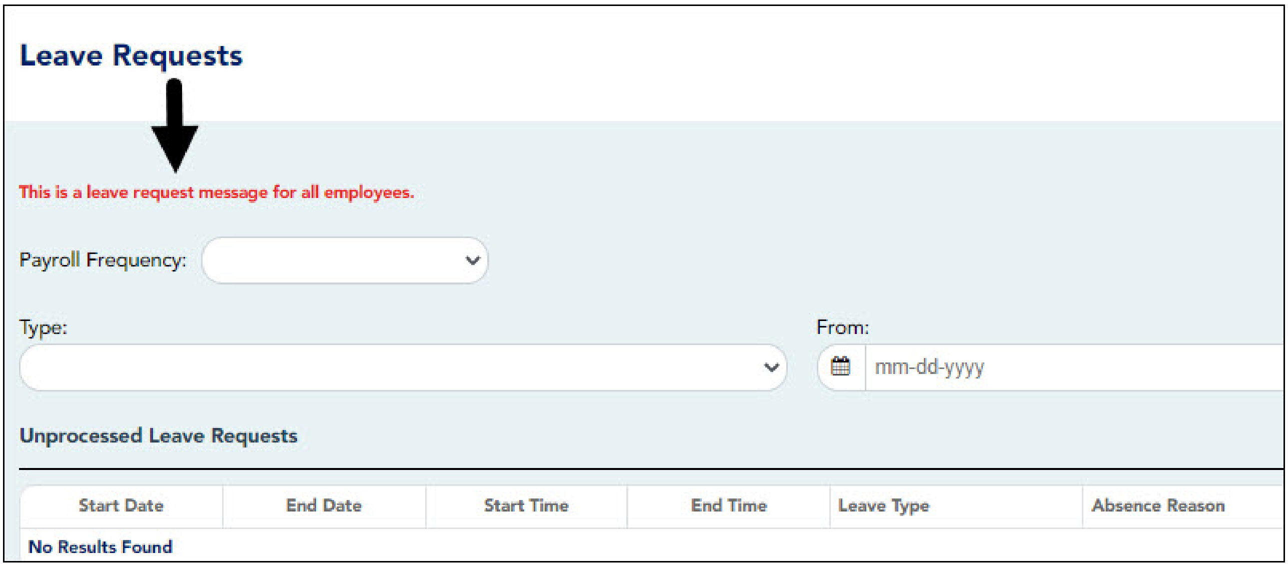
Payroll > Tables > District EP Options > EmployeePortal Options

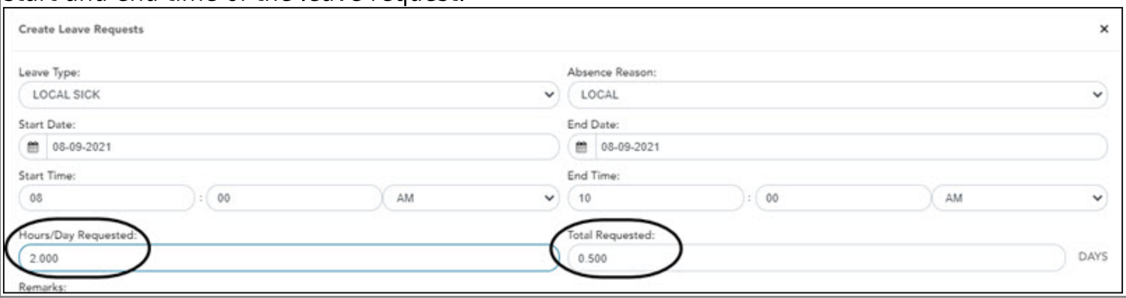


❑ Under **Enable**, select **Leave Request** to enable the leave request feature in EmployeePortal.

❑ Under **Messages**, select **Leave Request** to enable employees to view a preset message on the Leave Requests page in EmployeePortal.

- Type the applicable message in the text box.
- The message is displayed in red at the top of the Leave Requests page in EmployeePortal.



Use PMIS for Supervisor Levels	(Optional if using PMIS) Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request. If this field is selected, you do not need to complete the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor page.
Force Entry of Leave Hours Requested	Select to require the employee to enter the number of requested leave hours when submitting a leave request. If selected, the number of leave hours requested is not automatically calculated.  If not selected, the number of leave hours requested is automatically calculated based on the start and end time of the leave request. 
Meal Break for Leave Calculation	Type the number of hours to be included in the hours per day calculation if a leave request exceeds five hours. An amount must be entered if a meal break is to be subtracted in the hours per day calculation. Valid values are 0.00-9.99.

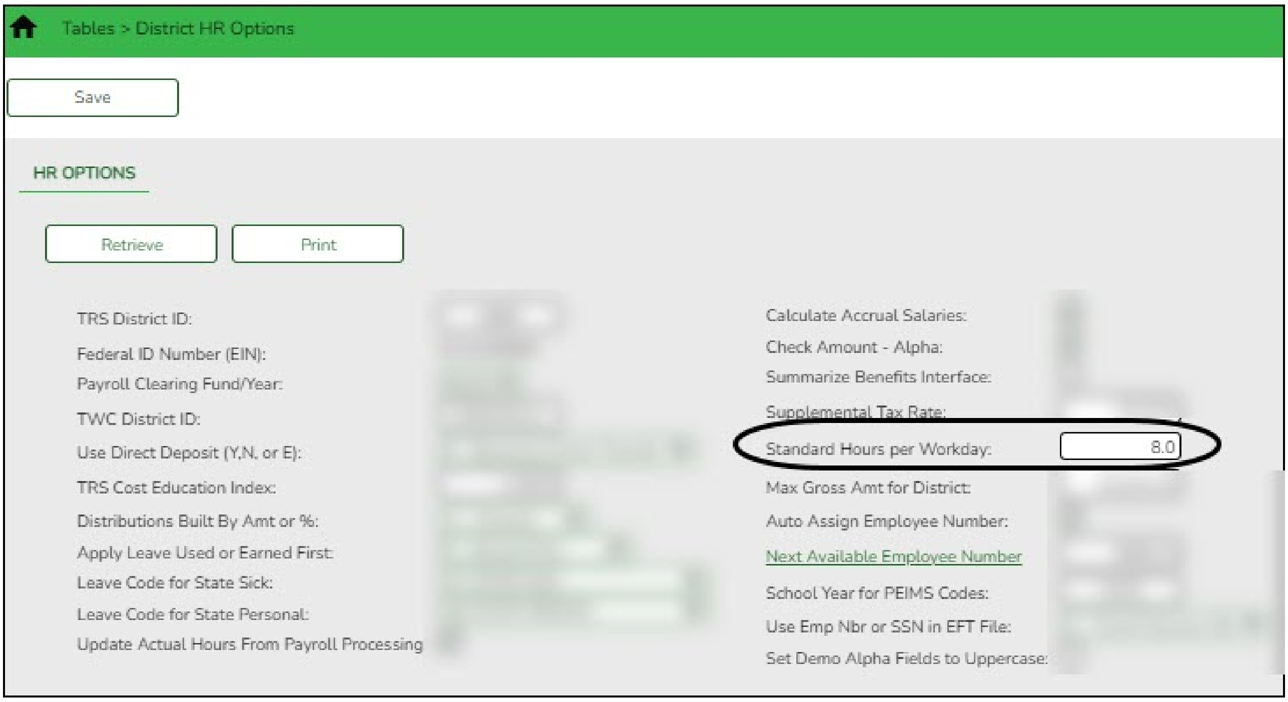
❑ Click **Save**.

Review the Leave Requests Help page for further information about how the **Total Requested** column is calculated.

2. Set the standard work day.

   Payroll > Tables > District HR Options

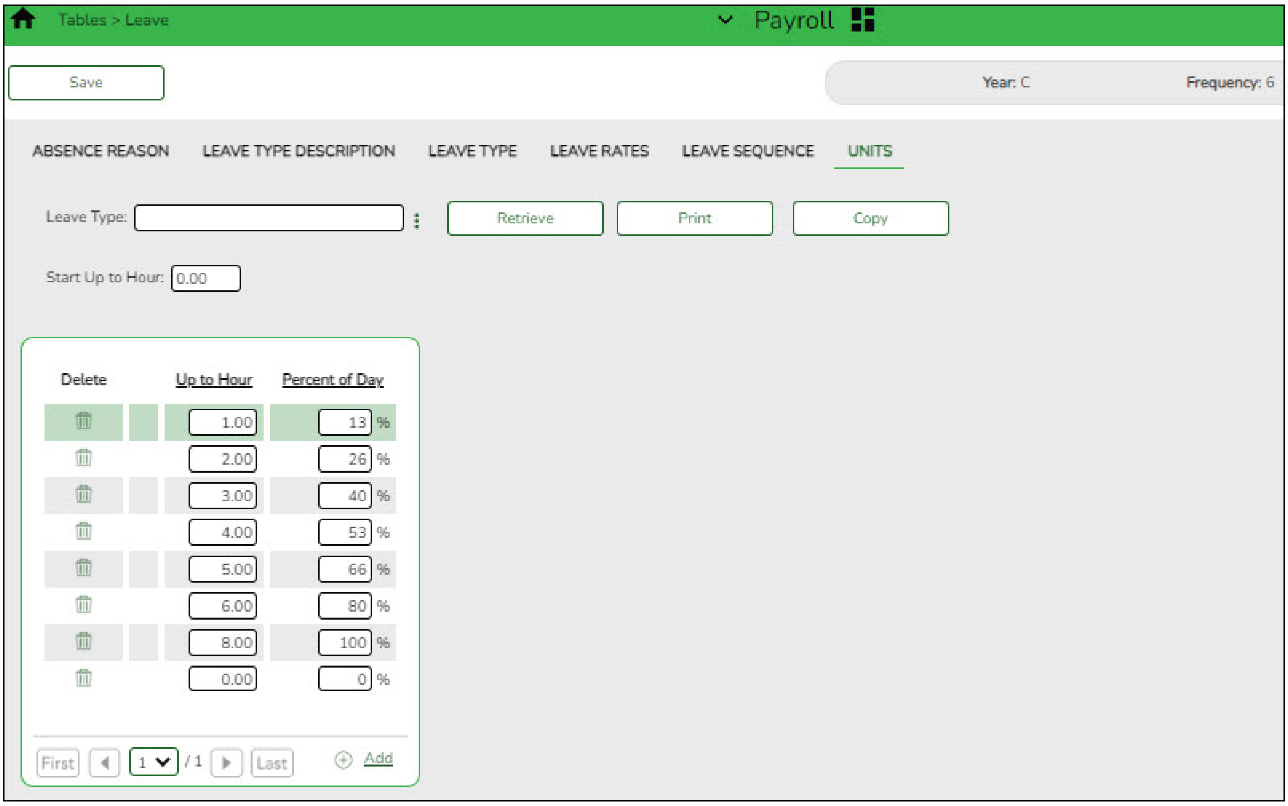
   In the **Standard Hours per Workday** field, type the standard number of hours that the LEA requires hourly employees to work.



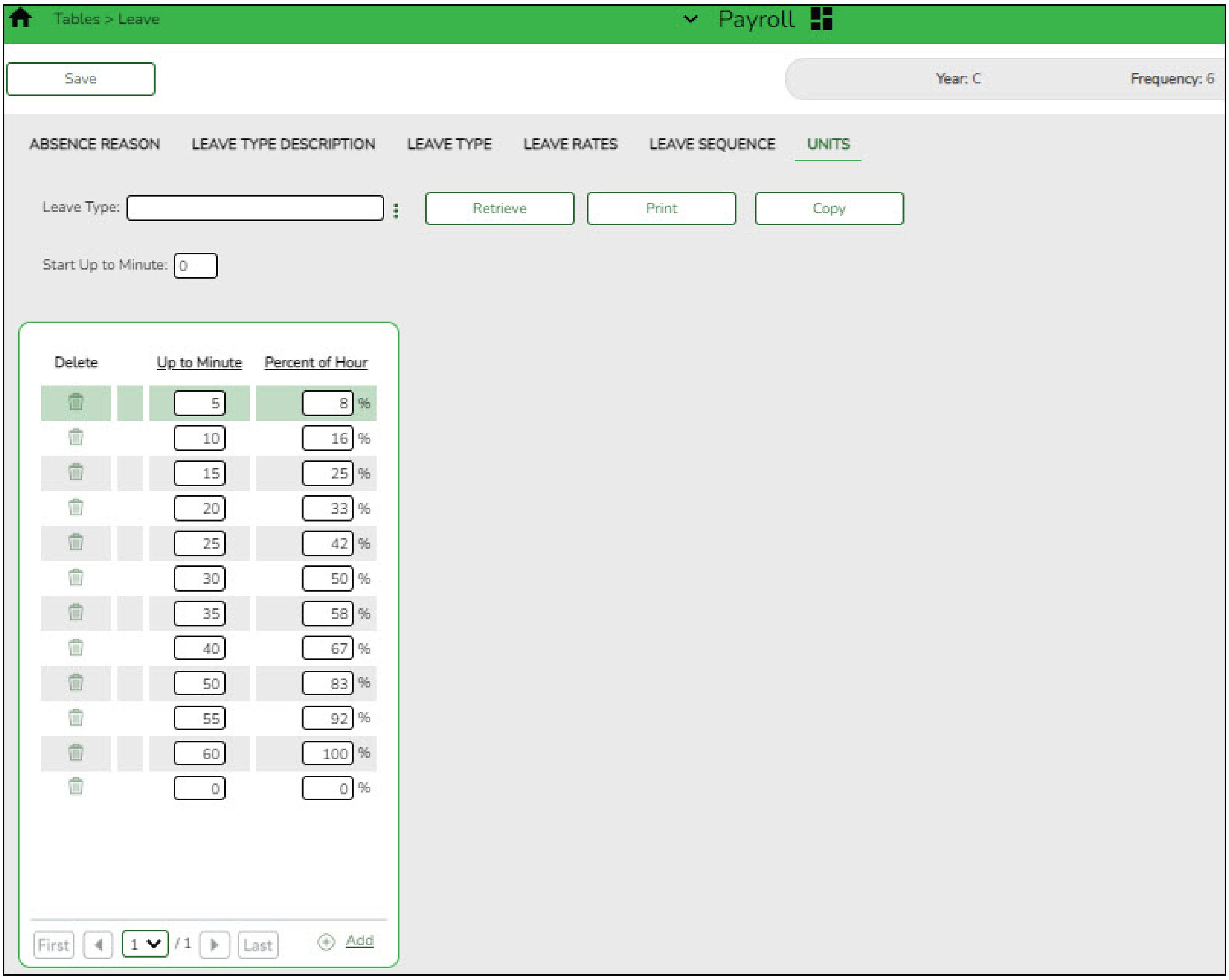
3. Define the units of hours or days to be used when calculating leave requests.

   Payroll > Tables > Leave > Units

   ❑ If the **Days/Hrs** field is set to *Days* on the Tables > Leave > Leave Type tab for the selected leave type, add units for hours.



   ❑ If the **Days/Hrs** field is set to *Hours* for the selected leave type, add units for minutes.

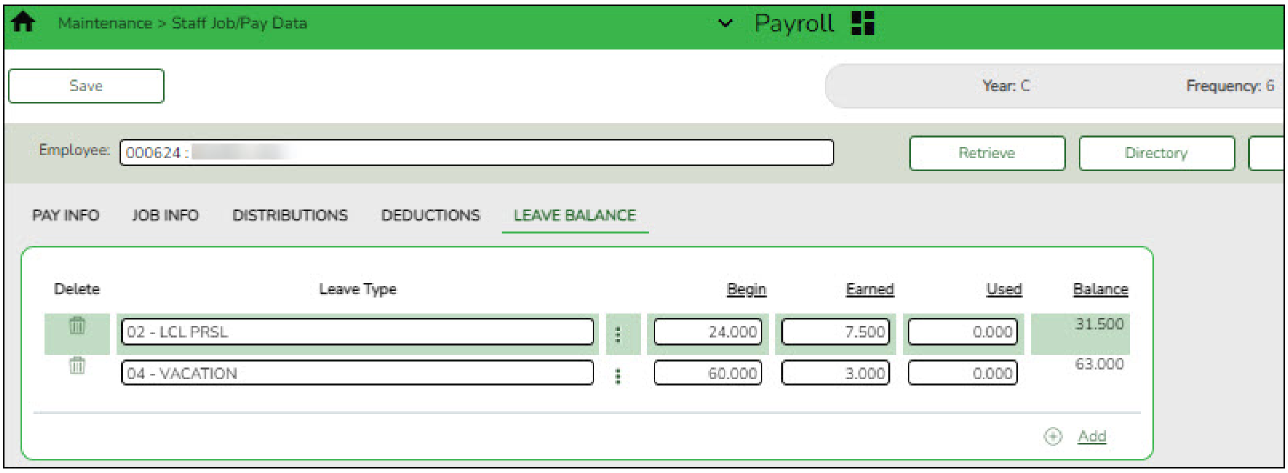


4. Assign leave types and balances for each applicable pay frequency.

   Payroll > Maintenance > Staff Job/Pay Data > Leave Balance

   You can assign multiple leave types to employees in the pay frequency to which you are logged on.

   Note: If the employee has leave balance data in multiple frequencies, the employee can select the pay frequency from the **Pay Frequency** drop down on the Leave Requests page in EmployeePortal.

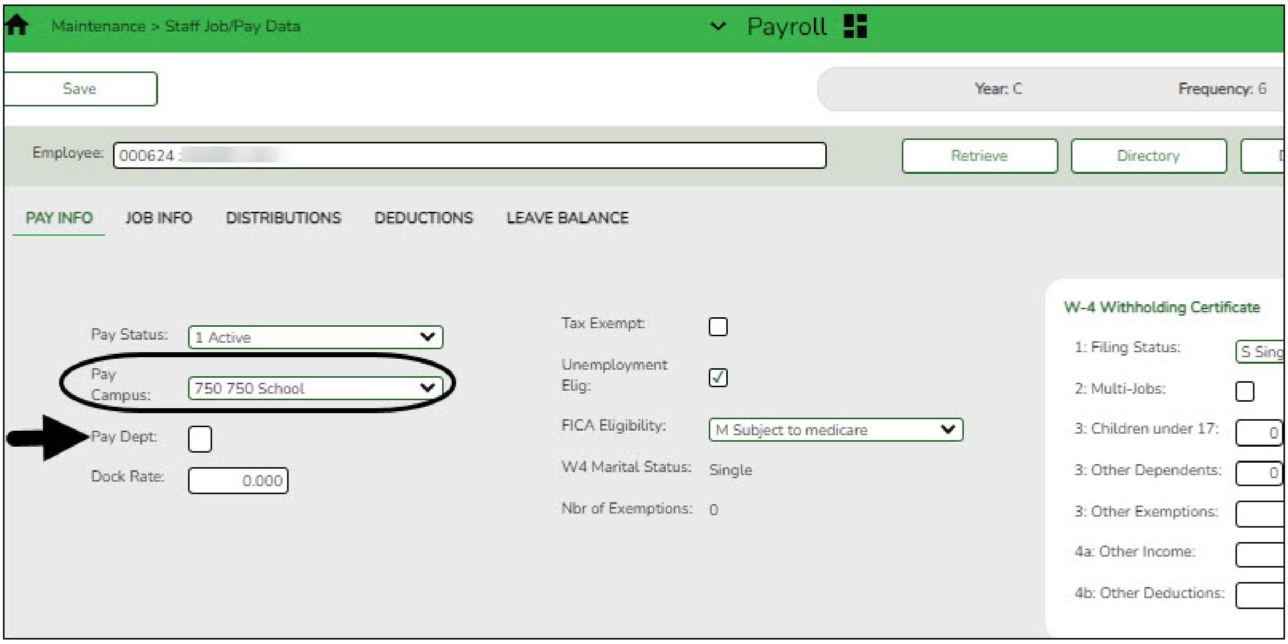


5. Manage leave pay campuses.

The employee's pay campus must exist on the Payroll > Tables > District EP Options > Leave Campuses tab to allow the employee to access the Leave Requests page in EmployeePortal.

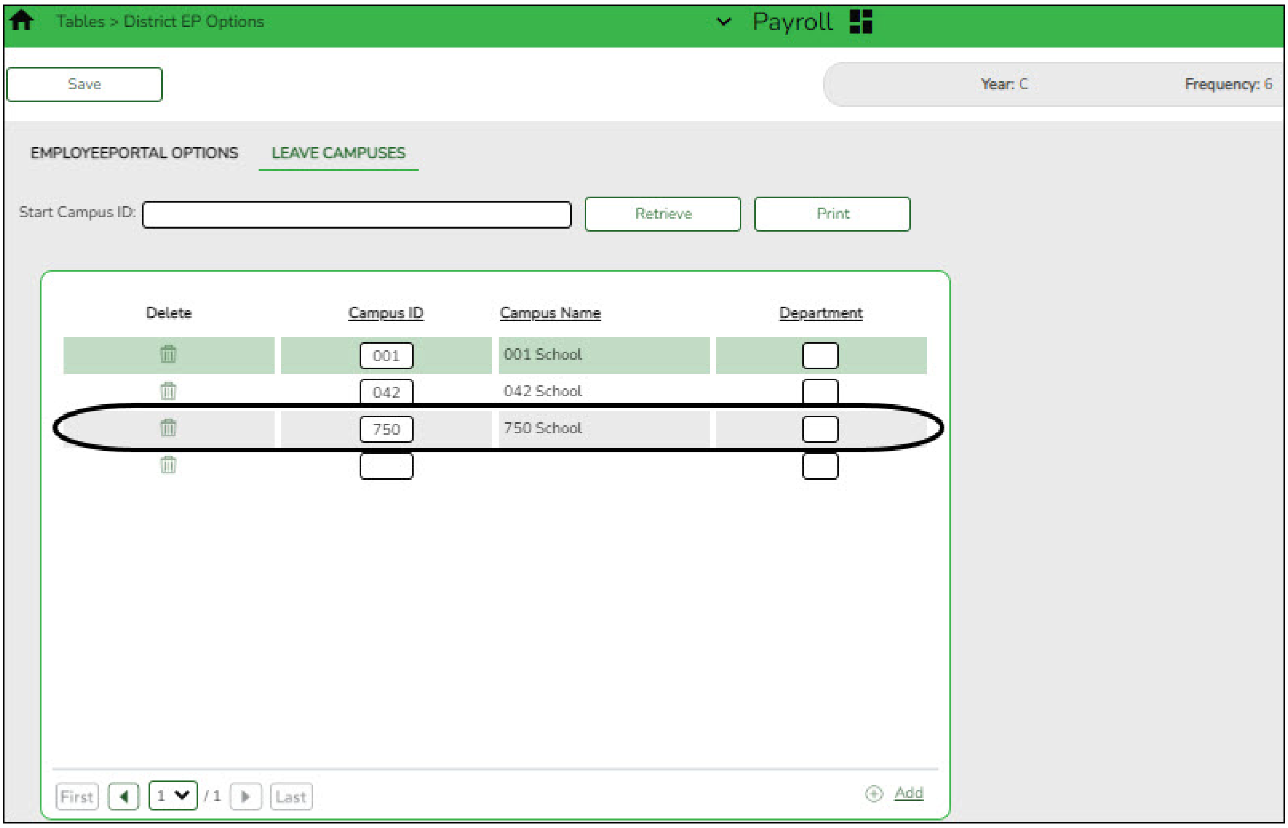
❑ Payroll > Maintenance > Staff Job/Pay Data > Pay Info

- Obtain the employee pay campus data.
- *Optional*: Obtain the **Pay Dept** if applicable.



❑ Payroll > Tables > District EP Options > Leave Campuses

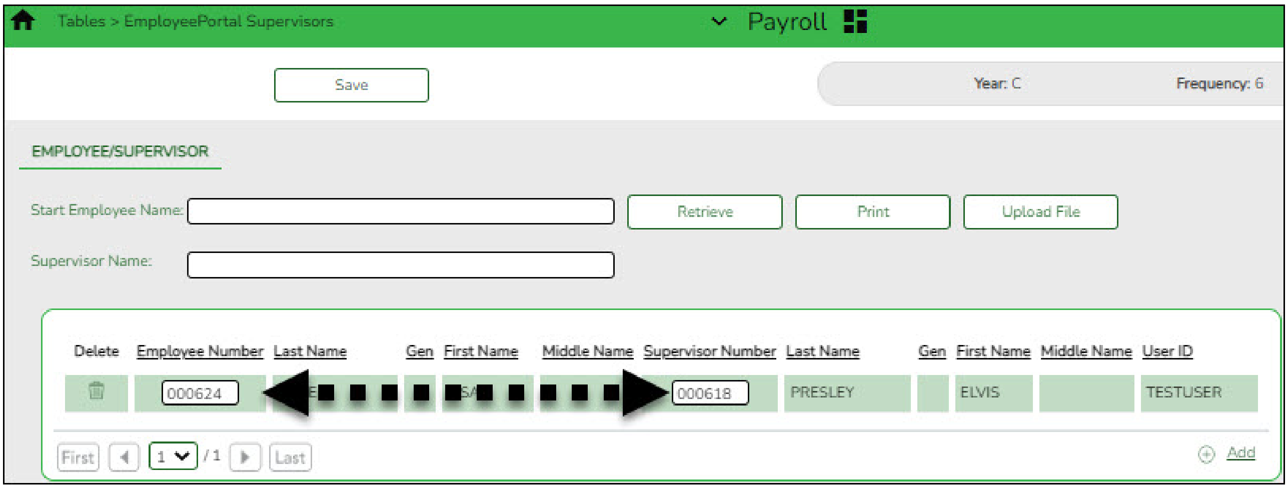
- Each pay campus and department with assigned employees must be added to this tab in order to use the EmployeePortal leave request feature.
- *Optional*: If a **Pay Dept** is assigned to the employee on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab, then it must be assigned on the Leave Campuses tab.



6. Designate the employee/direct supervisor relationship.

This setting serves two purposes, it determines the leave request approval path for the employee and allows the supervisor to access the Supervisor menu in EmployeePortal.

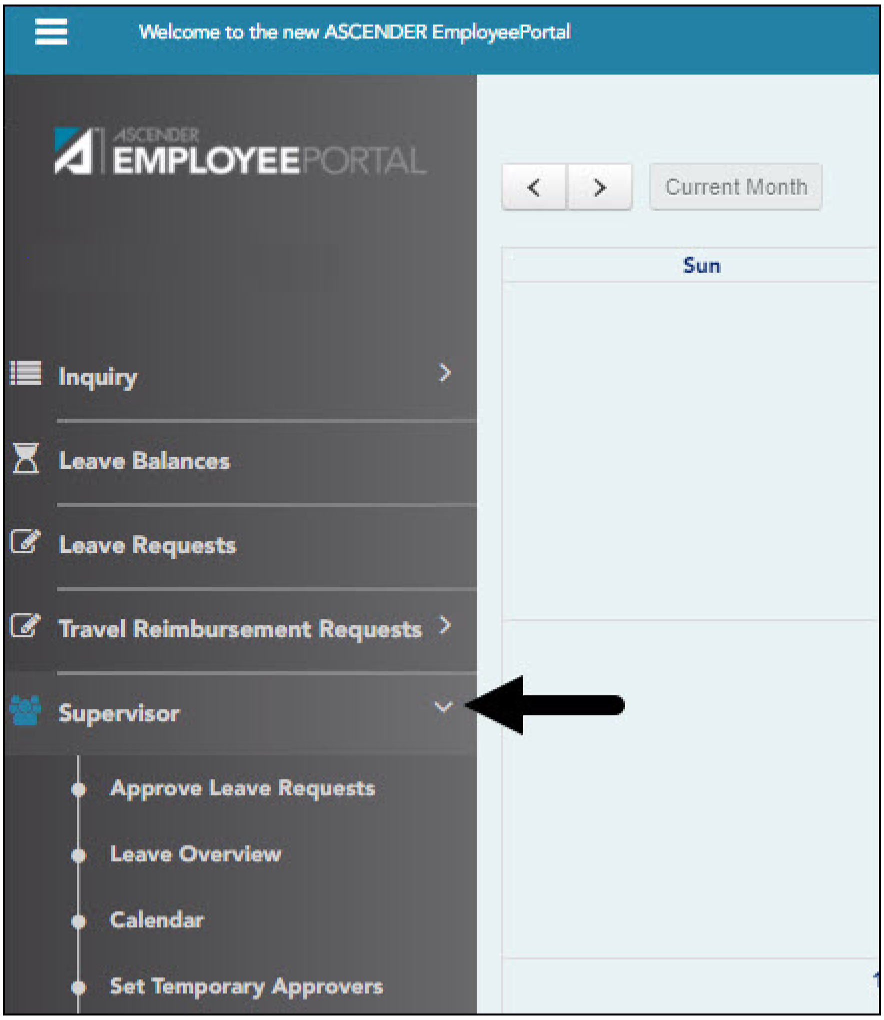
Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor



Notes:

- This page does not need to be populated if **Use PMIS for Supervisor Levels** is selected on the Payroll > Tables > District EP Options > EmployeePortal Options tab.
- An employee must have a designated supervisor prior to submitting leave requests in EmployeePortal.

A supervisor must have at least one assigned employee on the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor tab in order to access the Supervisor menu in EmployeePortal.



Refer to the Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers for more information about setting up temporary approvers and performing supervisor-level tasks.

After the above steps are completed, users can submit leave requests in EmployeePortal.

V. Set up Self Service Options

❑ Use the EP Self-Service Assignments pages to manage the demographic and payroll fields that the user can view and update in EmployeePortal.

- Personnel > Tables > EP Self-Service Assignments Demographic
- Payroll > Tables > EP Self-Service Assignments Payroll

❑ Use the following pages to view and approve pending maintenance requests that were submitted by users in EmployeePortal.

Payroll:

- Payroll > Self-Service > Pending
- Payroll > Self-Service > Payroll Approval
- Payroll > Self-Service > Pending by Alternate
- Payroll > Self-Service > Payroll Approval by Alternate

Personnel:

- Personnel > Self-Service > Pending
- Personnel > Self-Service > Pending by Alternate
- Personnel > Self-Service > Demographic Approval
- Personnel > Self-Service > Demographic Approval by Alternate

❑ If a user is locked out of their account, delete their EmployeePortal account and advise them to create a new account using the **New User** button on the EmployeePortal login page.

- Personnel > Self-Service > Delete EP Users

❑ The following Self Service Reports are available:

- Payroll > Reports > Self-Service Reports > HRS8000 - Self-Service Requests
- Payroll > Reports > Self-Service Reports > HRS8005 - Leave Request Report
- Payroll > Reports > Self-Service Reports > HRS8015 - Leave Request Comparison Report
- Personnel > Reports > Self-Service Reports > Self-Service Requests

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ASCENDER EmployeePortal Guides

❑ Refer to the Employee Guide: Login, Data Inquiries, Self Service & Leave Requests for more information about using EmployeePortal.

❑ If you are a supervisor, refer to the Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers for more information about using EmployeePortal to perform supervisor-level tasks.


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Back Cover