



# **Admin Guide: ASCENDER EmployeePortal Leave Requests Setup**



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# Admin Guide: ASCENDER EmployeePortal Leave Requests Setup

The purpose of this document is to guide you through the necessary steps of setting up Security Administration and Payroll in order to take complete advantage of the benefits associated with using the leave request feature in EmployeePortal.

Some of the images and examples provided in this document are for informational purposes and may not completely represent your LEA's process.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).

## Set up Supervisor and Temporary Approver 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.

Maintenance > Staff Demo

Personnel

Save

Employee: 000624: Retrieve Directory Add Emp Documents

DEMOGRAPHIC INFORMATION CREDENTIALS VERIFICATION INSURANCE SERVICE RECORD RESPONSIBILITY

Staff ID/SSN: Texas Unique Staff ID: Last Change: 04-13-2022

Name

Legal: Former: Title First Middle Last Generation

Phone

Hm: Bus: Cell: Area Cd Phone Nbr Ext

Restrictions

Local: N No restriction Public: N No restriction

Local Use

1: 2:

Emp Notes

Work E-mail: user@email.com

## 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.

Edit User

Security Administration

Save

Last Name: First Name: Middle Initial: User ID: Profile Name: LISA Employee Nbr: 000624

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

## Set up Payroll Options

If you have not already, 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 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.

The screenshot shows the 'Tables > District HR Options' form. At the top, there is a green header bar with a home icon and the text 'Tables > District HR Options'. Below the header, there is a 'Save' button. The main section is titled 'HR OPTIONS' and contains two buttons: 'Retrieve' and 'Print'. The form is divided into two columns of fields. The left column includes: TRS District ID, Federal ID Number (EIN), Payroll Clearing Fund/Year, TWC District ID, Use Direct Deposit (Y,N, or E), TRS Cost Education Index, Distributions Built By Amt or %, Apply Leave Used or Earned First, Leave Code for State Sick, Leave Code for State Personal, and Update Actual Hours From Payroll Processing. The right column includes: Calculate Accrual Salaries, Check Amount - Alpha, Summarize Benefits Interface, Supplemental Tax Rate, Standard Hours per Workday (highlighted with a red circle and containing the value '8.0'), Max Gross Amt for District, Auto Assign Employee Number, Next Available Employee Number (a link), School Year for PEIMS Codes, Use Emp Nbr or SSN in EFT File, and Set Demo Alpha Fields to Uppercase.

## 2. 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.

Tables > Leave Payroll

Save Year: C Frequency: 6

ABSENCE REASON LEAVE TYPE DESCRIPTION LEAVE TYPE LEAVE RATES LEAVE SEQUENCE UNITS

Leave Type:  :

Start Up to Hour:

Delete	Up to Hour	Percent of Day
	<input type="text" value="1.00"/>	<input type="text" value="13 %"/>
	<input type="text" value="2.00"/>	<input type="text" value="26 %"/>
	<input type="text" value="3.00"/>	<input type="text" value="40 %"/>
	<input type="text" value="4.00"/>	<input type="text" value="53 %"/>
	<input type="text" value="5.00"/>	<input type="text" value="66 %"/>
	<input type="text" value="6.00"/>	<input type="text" value="80 %"/>
	<input type="text" value="8.00"/>	<input type="text" value="100 %"/>
	<input type="text" value="0.00"/>	<input type="text" value="0 %"/>

First  1 / 1  Last  Add

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

Tables > Leave Payroll

Save Year: C Frequency: 6

ABSENCE REASON LEAVE TYPE DESCRIPTION LEAVE TYPE LEAVE RATES LEAVE SEQUENCE UNITS

Leave Type:  :

Start Up to Minute:

Delete	Up to Minute	Percent of Hour
	<input type="text" value="5"/>	<input type="text" value="8 %"/>
	<input type="text" value="10"/>	<input type="text" value="16 %"/>
	<input type="text" value="15"/>	<input type="text" value="25 %"/>
	<input type="text" value="20"/>	<input type="text" value="33 %"/>
	<input type="text" value="25"/>	<input type="text" value="42 %"/>
	<input type="text" value="30"/>	<input type="text" value="50 %"/>
	<input type="text" value="35"/>	<input type="text" value="58 %"/>
	<input type="text" value="40"/>	<input type="text" value="67 %"/>
	<input type="text" value="50"/>	<input type="text" value="83 %"/>
	<input type="text" value="55"/>	<input type="text" value="92 %"/>
	<input type="text" value="60"/>	<input type="text" value="100 %"/>
	<input type="text" value="0"/>	<input type="text" value="0 %"/>

First  1 / 1  Last  Add



### 3. 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.

The screenshot shows the 'Leave Balance' page in the EmployeePortal. The page has a green header with 'Maintenance > Staff Job/Pay Data' and 'Payroll'. Below the header, there is a 'Save' button, a 'Year: C' dropdown, and a 'Frequency: 6' dropdown. An 'Employee:' field contains the value '000624'. Below this, there are 'Retrieve' and 'Directory' buttons. The main content area has tabs for 'PAY INFO', 'JOB INFO', 'DISTRIBUTIONS', 'DEDUCTIONS', and 'LEAVE BALANCE'. The 'LEAVE BALANCE' tab is active, showing a table with the following data:

Delete	Leave Type	Begin	Earned	Used	Balance
	02 - LCL PRSL	24.000	7.500	0.000	31.500
	04 - VACATION	60.000	3.000	0.000	63.000

At the bottom right of the table, there is an 'Add' button with a plus icon.

### 4. 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.

Maintenance > Staff Job/Pay Data

Payroll

Save

Year: C Frequency: 6

Employee: 000624 Retrieve Directory

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

Pay Status: 1 Active

Pay Campus: 750 750 School

Pay Dept: ☐

Dock Rate: 0.000

Tax Exempt: ☐

Unemployment Elig: ☒

FICA Eligibility: M Subject to medicare

W4 Marital Status: Single

Nbr of Exemptions: 0

W-4 Withholding Certificate

1: Filing Status: S Sing

2: Multi-Jobs: ☐

3: Children under 17: 0

3: Other Dependents: 0

3: Other Exemptions: ☐

4a: Other Income: ☐

4b: Other Deductions: ☐

□ 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.

Tables > District EP Options

Payroll

Save

Year: C Frequency: 6

EMPLOYEEPORTAL OPTIONS LEAVE CAMPUSES

Start Campus ID: Retrieve Print

Delete	Campus ID	Campus Name	Department
	001	001 School	<input type="checkbox"/>
	042	042 School	<input type="checkbox"/>
	750	750 School	<input type="checkbox"/>
			<input type="checkbox"/>

First 1 / 1 Last Add

5. 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 &gt; Tables &gt; EmployeePortal Supervisors &gt; Employee/Supervisor

Tables > EmployeePortal Supervisors Payroll

Save Year: C Frequency: 6

**EMPLOYEE/SUPERVISOR**

Start Employee Name:  Retrieve Print Upload File

Supervisor Name:

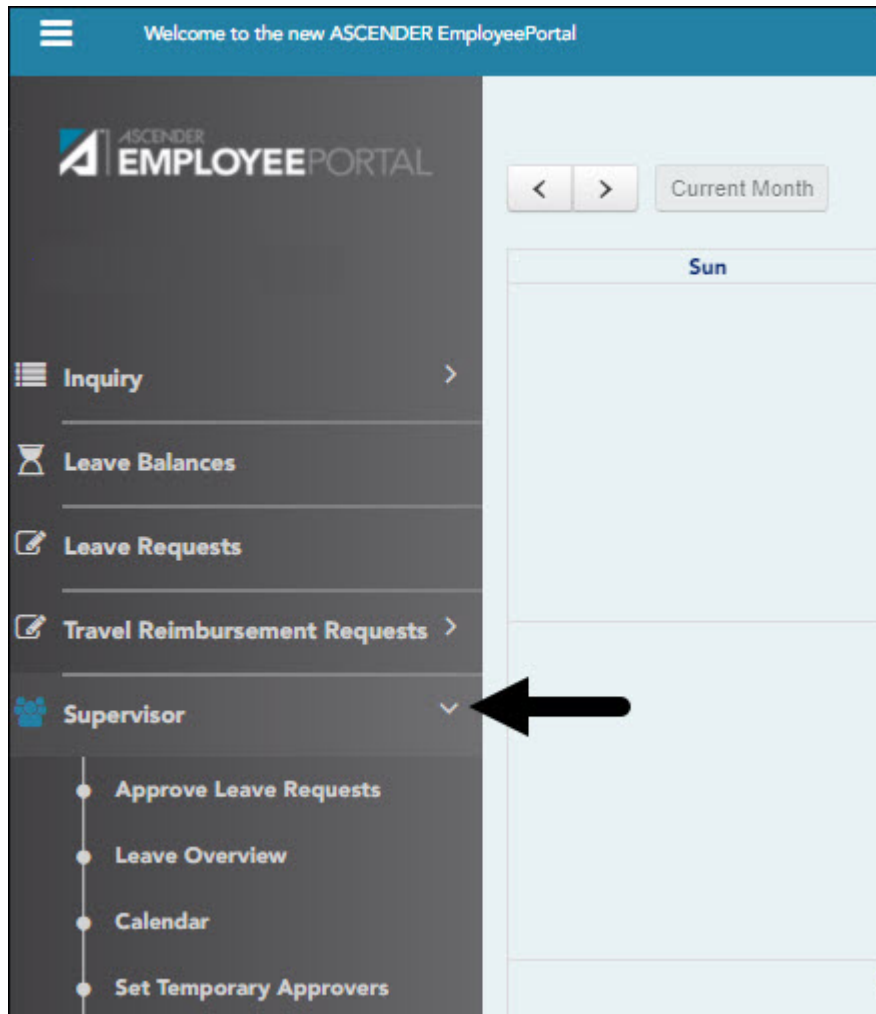
Delete	Employee Number	Last Name	Gen	First Name	Middle Name	Supervisor Number	Last Name	Gen	First Name	Middle Name	User ID
	000624					000618	PRESLEY		ELVIS		TESTUSER

First 1 / 1 Last Add

**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.

## Enable the Leave Request Feature

1. [Set up district EP options.](#)

[Payroll > Tables > District EP Options > EmployeePortal Options](#)

Tables > District EP Options Payroll

Save Year: C Frequency: 6

EMPLOYEEPORTAL OPTIONS LEAVE CAMPUSES

Retrieve Print

Use: ☒ Employee Number ☐ Social Security Number

**Enable**

- ☒ EmployeePortal System
- ☒ 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

**Messages**

- ☐ EmployeePortal System
- ☐ 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

This is a leave request message for all employees.

- ☐ 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.

**Leave Requests**

This is a leave request message for all employees.

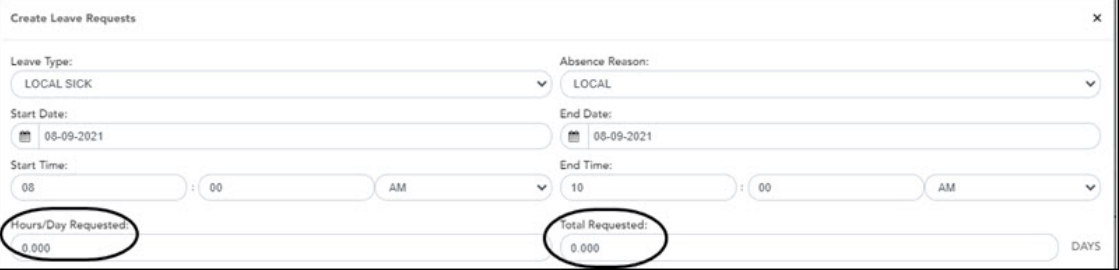
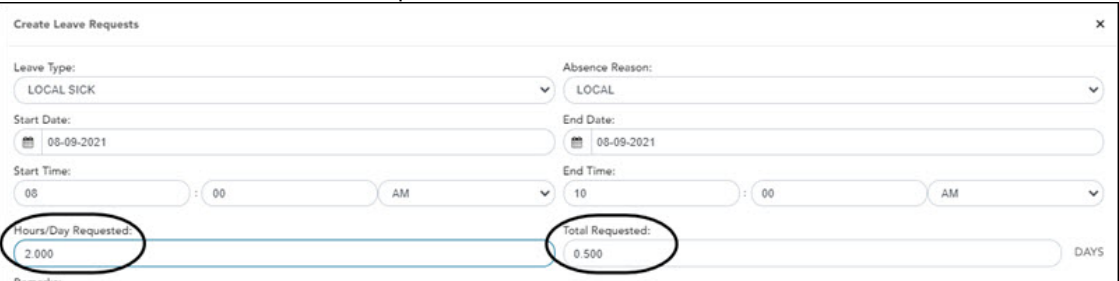
Payroll Frequency:

Type:  From:

**Unprocessed Leave Requests**

Start Date	End Date	Start Time	End Time	Leave Type	Absence Reason
No Results Found					

<b>Use PMIS for Supervisor Levels</b>	<p>(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.</p> <p>If this field is selected, you do not need to complete the Payroll &gt; Tables &gt; EmployeePortal Supervisors &gt; Employee/Supervisor page.</p>
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<b>Force Entry of Leave Hours Requested</b>	<p>Select to require the employee to enter the number of requested leave hours when submitting a leave request.</p> <p>If selected, the number of leave hours requested is not automatically calculated.</p>  <p>If not selected, the number of leave hours requested is automatically calculated based on the start and end time of the leave request.</p> 
<b>Meal Break for Leave Calculation</b>	<p>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.</p>

☐ Click **Save**.

Review the [Leave Requests](#) Help page for further information about how the **Total Requested** column is calculated.



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

Ensure that all employees are set up with a user name and password, and can log on to EmployeePortal. If not, review the [Employee Guide: Create Account & Login](#) for additional information about user setup.

**Admin Note:** The payroll department will use the Utilities > Import Online Leave Requests page in the ASCENDER Payroll application to import the leave request(s) from EmployeePortal and create a leave transmittal to be processed by payroll. After a leave transmittal has been created in Payroll, the employee can no longer edit or delete the leave request.



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