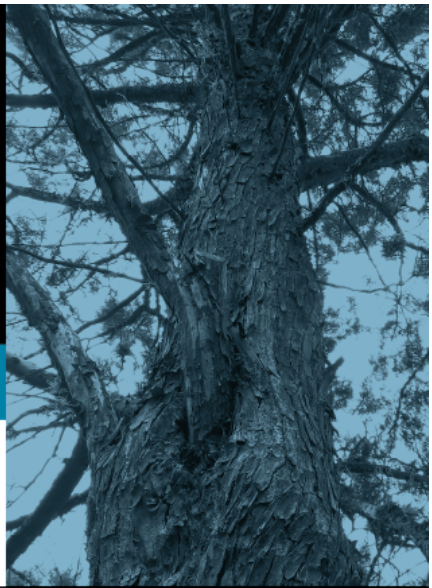
ASCENDER GUIDES



Supervisor Guide: Manage Leave Requests & Set Temporary Approvers

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Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers

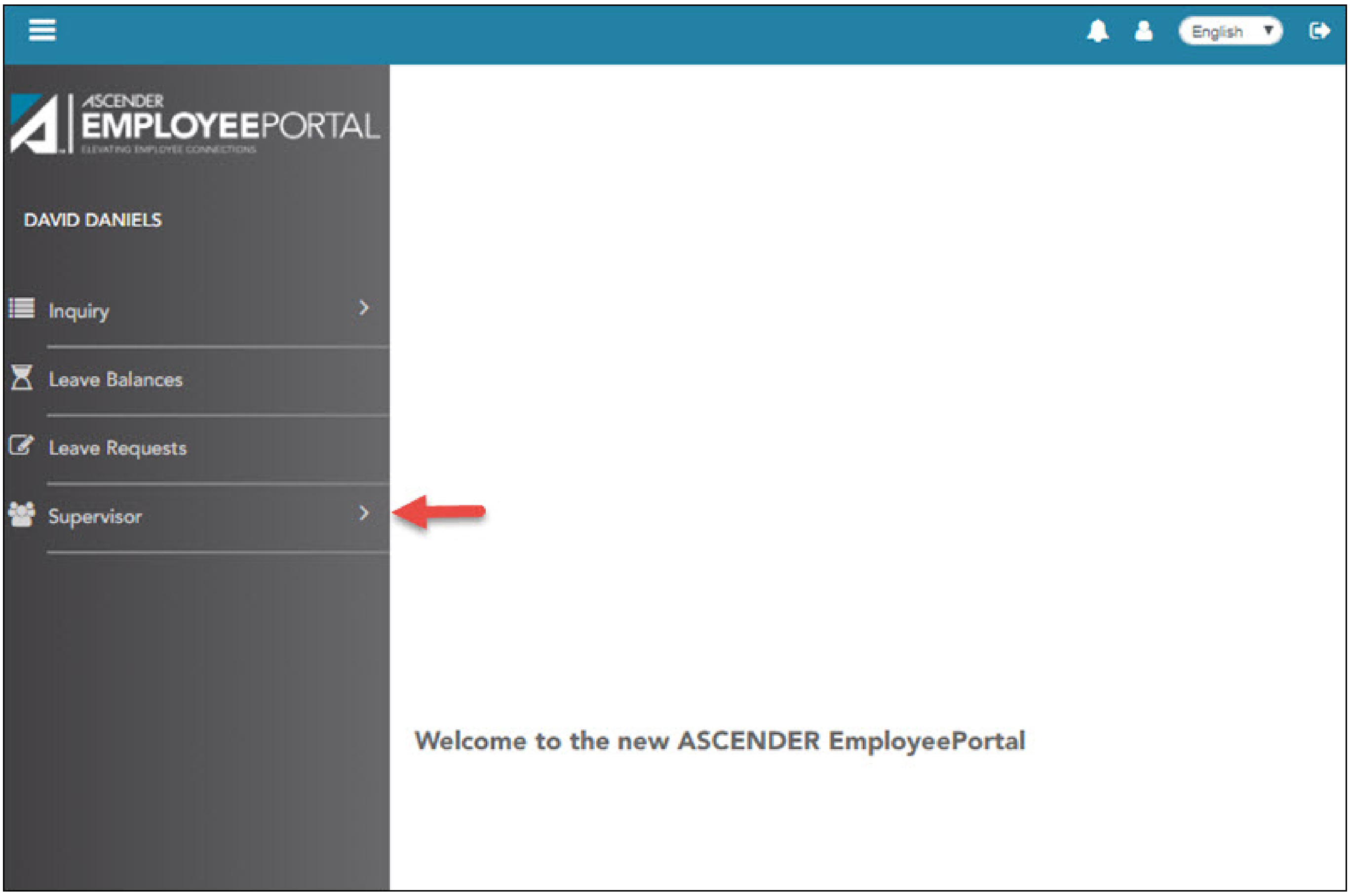
This guide provides a step-by-step process for supervisors managing online leave requests in EmployeePortal.

Before You Begin

❑ Review the ASCENDER EmployeePortal Navigation page to familiarize yourself with the portal layout.

❑ Review the Employee Guide: Login, Data Inquiries, Self Service, & Leave Requests for information about logging on to EmployeePortal.

After logging on to EmployeePortal with supervisor access, you will see an additional Supervisor menu on the left-hand side of the page.



The Supervisor menu allows you to perform the following tasks:

- View pending leave requests.
- View available leave balances for your employees and their direct report employees.
- Approve or disapprove leave requests for your direct report employees and any employees who report to them.

- Submit leave requests for your direct report employees and any employees who report to them.
- Set temporary approvers for yourself, your direct report supervisors, and any supervisors who report to your direct report supervisors.

I. Manage Leave Requests

1. View pending leave requests.

II. Approve or Disapprove Leave Requests

1. Approve or disapprove leave requests.

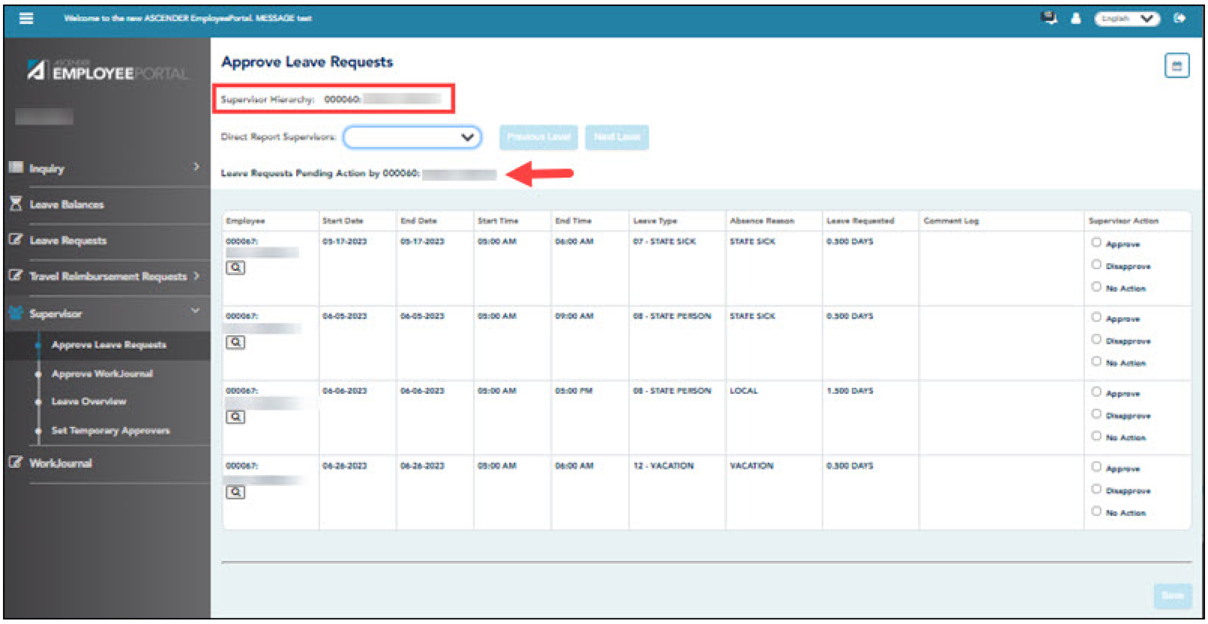
   EmployeePortal > Supervisor > Approve Leave Requests

   This page is used to approve or disapprove employee leave requests. Additionally, you can review and take action on any leave requests that are submitted to your direct report employees who are supervisors.

   If a direct report employee submits a leave request, an email message is automatically sent to the email address listed on your demographic record prompting you to take action on the leave request. Or, if a direct report employee deletes a leave request that has already been approved, you will receive an email message to notify you of this change. Therefore, it is important that all approvers in the approval path have an email address listed on their demographic record in Personnel. Additionally, you will receive a message notification in the top-right corner of the page.

   1. View leave requests.

      When you access the Approve Leave Requests page, your name is displayed in the **Supervisor Hierarchy** field and a list of leave requests pending your action is displayed if any.

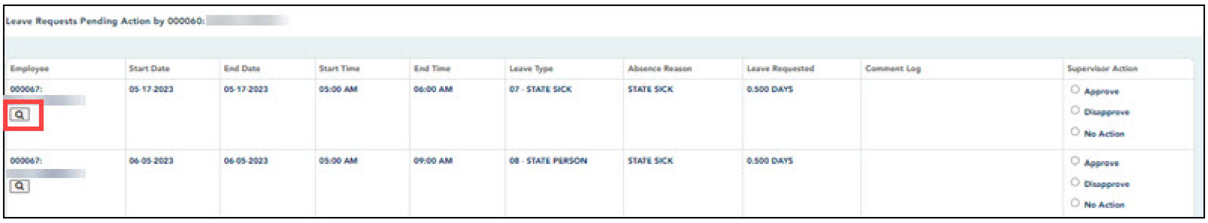


Field	Description
Supervisor Hierarchy	Your employee number and name are displayed. Under **Leave Requests Pending Action**, a list of all pending leave requests from your direct report employees is displayed. Follow the steps in the **Approve or disapprove a leave request** section to take action on applicable leave requests. If you want to view pending leave requests that are awaiting action from one of your direct report supervisors. Select the supervisor's name from the **Direct Report Supervisors** drop-down field.

❏ If you need to approve leave requests for any of your direct report supervisors, change the **Supervisor Heirarchy**.

Direct Report Supervisors	If you have supervisors who report directly to you, click ˅ to view a list of the supervisors. Select the supervisor's name. The **Next Level** button is enabled. Click **Next Level**. The selected supervisor's name is moved to the **Supervisor Hierarchy** level and a list of leave requests pending their approval is displayed. Follow the steps in the **Approve or disapprove a leave request** section to take action on the applicable leave requests. Click **Previous Level** to return to the list of pending leave requests for the previous level of supervisor hierarchy.

❏ To view the employee's leave balance summary, click 🔍 under the employee's name.



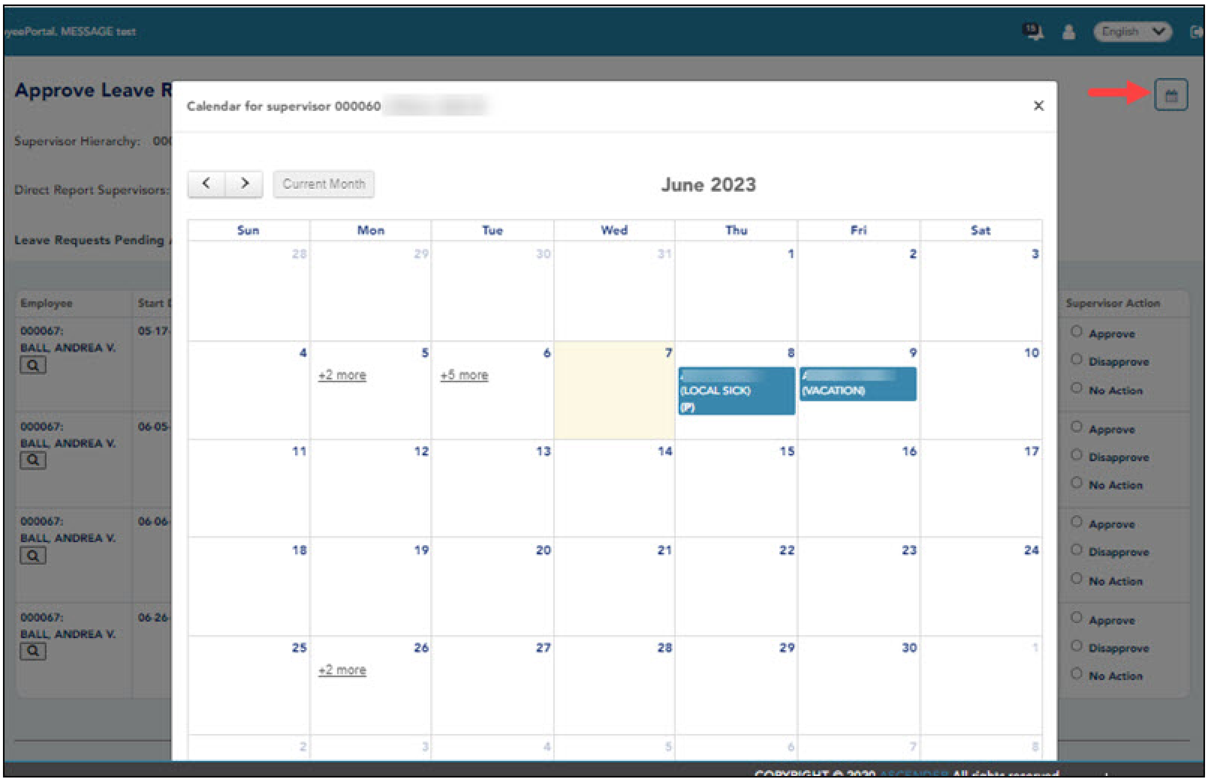
The Leave Balance Summary window opens with the employee's leave balance details.

Leave Type	The specific leave code(s) for which you have leave data is displayed. The leave types are first displayed in the order that is set for your check (called stub position), and then leave type code (01-99) order.
Beginning Balance	The leave balance as of the beginning of this year for each leave type is displayed.
Advanced/Earned	The number of units of leave advanced or earned as of the last pay period is displayed.
Pending Earned	The total leave earned but not yet processed through payroll is displayed.
Used	The number of units of leave used as of the last pay period is displayed.
Pending Used	The total leave pending and approved but not yet processed through payroll is displayed. This amount is subtracted from the **Available Balance** field.
Available	The total number of leave units still available for use is displayed. The **Available** balance is determined by the following calculation: (prior year balance + advanced earned + pending earned) - used - pending used
Units	Indicates the type of units (hours or days) that is used when calculating leave requests.

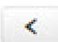
❏ Click **OK** to close the window.

2. View leave in a calendar format.

❏ In the upper-right corner, click to view leave requests in a calendar format. A view of the current month is displayed with all submitted leave requests. This page provides a view of all leave requests for yourself, your direct report employees, and any employees who report to them.



❑ Click a leave request entry from the calendar to open a window with the leave request details.

- Click  to view the previous month.
- Click  to view the next month.
- Click **Current Month** to view the current month. The **Current Month** button is only enabled if you are viewing a prior or future month.
- Click **X** or **Close** to close the calendar view and return to the table view.

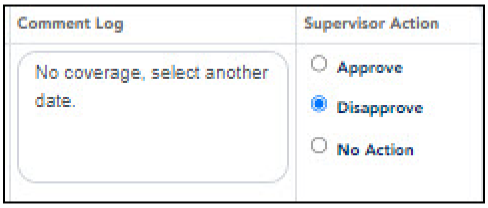
Note: You may have to use the scroll bar to scroll down and view the **Close** button.

3. Approve or disapprove a leave request.

Under **Leave Requests Pending Action**, a list of leave requests pending action is displayed with the following details:

Employee	The employee number and name are displayed.
Start and End Date	The start and end date range for the leave request is displayed in the MMDDYYYY format.
Start and End Time	The start and end time range for the leave request is displayed in the HH MM format.
Leave Type	The leave type requested is displayed.
Absence Reason	The absence reason for the leave request is displayed.
Leave Requested	The total amount of requested leave and unit type (i.e., hours or days) is displayed.
Comment Log	Any employee comments that were added to the leave request are displayed.

❑ Under **Supervisor Action**, select the appropriate action (**Approve**, **Disapprove**, or **No Action**).



❑ The Comment Log text box is enabled if **Approve** or **Disapprove** is selected. Type any comments related to the leave request.

- If you approve the leave request, a comment is not required.
- If you disapprove the leave request, a comment is required. This comment is included in the email message that is sent to the employee notifying them of the action taken.

❑ Click **Save**. If you are the final approver, an email message is sent to the employee notifying them of the action (approved/disapproved) taken on the request.

- If the request is approved or disapproved, the request is no longer displayed in the list of pending leave requests.
- If no action is taken, the request remains in the list of pending leave requests.

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.

III. View Leave

1. View leave.

   EmployeePortal > Supervisor > Leave Overview

   This page is used to view all current year processed and unprocessed (not posted to payroll) leave for your direct report employees and any employees who report to them. Additionally, you can create, edit, and delete leave requests for your direct report employees and any employees who report to them.

   If this page is disabled, check with your EmployeePortal administrator, as the LEA may have opted not to allow access.

   You can click in the upper-right corner to view leave requests in a calendar format.

Field	Description
Supervisor Hierarchy	Your employee number and name are displayed.
Direct Report Employees	Click to view a list of your direct report employees. Select an employee to view his leave data. A list of processed and unprocessed leave requests is displayed. If you select an employee who is also a supervisor, the **Next Level** button is enabled. Click **Next Level**. The supervisor's name moves to the **Supervisor Hierarchy** level and the drop down is populated with a list of his direct report employees. Click **Previous Level** to return to the previous level of the supervisor hierarchy.

❑ Use the following fields to narrow the leave data displayed on the page:

Payroll Frequency	Click to select the pay frequency for which you want to create a leave request. If you have leave in multiple frequencies such as biweekly, semimonthly, and monthly, those options are displayed and can be selected.
From and To	Type the range of dates for which you want to view processed and unprocessed leave data or click to select the dates. **Note**: An LEA setting determines whether or not to show processed and unprocessed leave transactions. The from date may not exceed 18 months from the current date. You can leave the date fields blank to retrieve dates 18 months from the current date. **Note**: The from and to date selections select leave dates rather than pay dates. Additionally, if the from and to dates are left blank, all future leave and all prior leave up to 18 months is retrieved. If a from date is entered and no to date is entered, all leave starting with the from date and all future leave is retrieved.

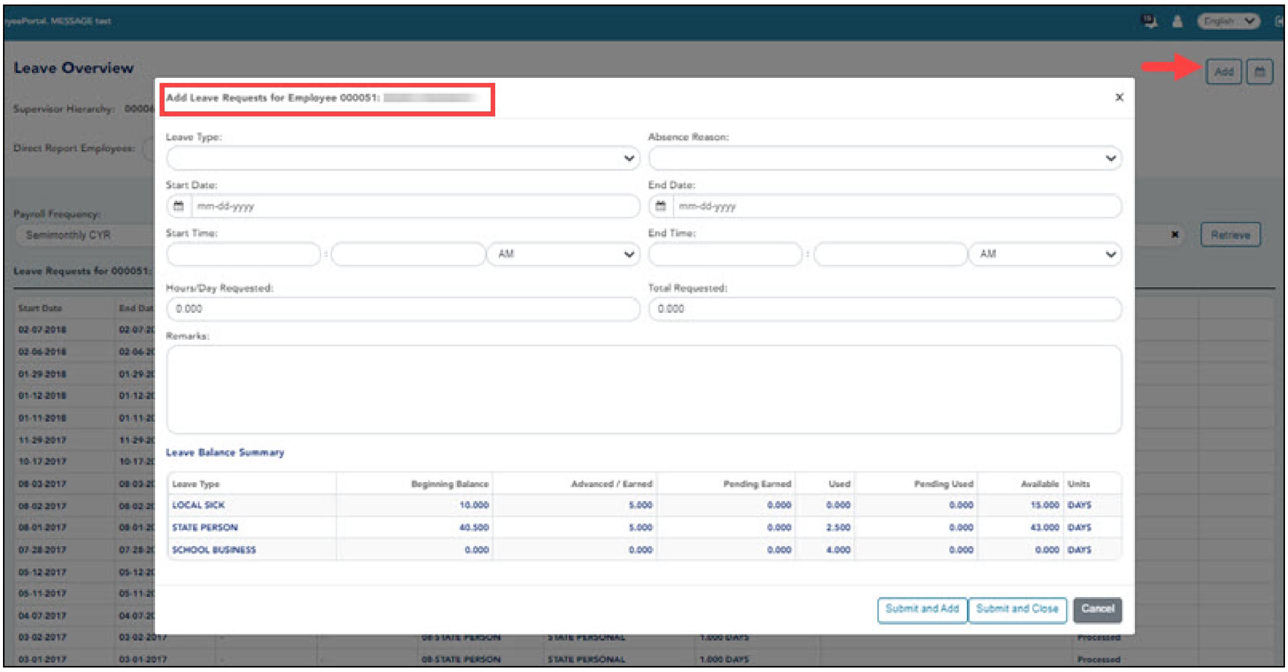
The following details are displayed for each leave request:

Start and End Date	The start and end date range for the leave request is displayed in the MMDDYYYY format.
Start and End Time	The start and end time range for the leave request is displayed in the HH MM format.
Leave Type	The leave type requested is displayed.
Absence Reason	The absence reason for the leave request is displayed.
Leave Requested	The total amount of requested leave and unit type (i.e., hours or days) is displayed.
Comment Log	Any employee (requestor) comments that were added to the leave request are displayed.
Status	The current status of the leave request is displayed.

Create a leave request:

❑ You can create leave requests for the selected employee by clicking **Add** in the upper-right corner of the page. The Create Leave Requests window opens.

Note: If you, as the supervisor, create a leave request for one of your employees, the leave request will automatically be approved and can be viewed on the Leave Overview page.



❑ Complete the following leave request fields:

Leave Type	Click ⌄ to select the type of leave to request. Only leave types assigned to the employee are displayed. An LEA setting determines whether or not a leave type with a zero balance can be used. All assigned active leave types are displayed even if the leave type amount is zero.
Absence Reason	Click ⌄ to select the absence reason. The absence reasons are determined by your LEA and correspond to the selected leave type.

Start Date	Type the start date for which you want to request leave for the employee in the MM/DD/YYYY format or click to select a date from the calendar.
End Date	This field is automatically populated with the date selected in the **Start Date** field; however, you can change the date. Type the end date for which you want to request leave for the employee in the MM/DD/YYYY format or click to select a date from the calendar. You can use this field to cover consecutive dates of a leave request excluding the weekend (Saturday/Sunday).
Start Time	Type the beginning time in the HH MM format for which you want to request leave for the employee. Click to select AM or PM.
End Time	Type the end time in the HH MM format for which you want to request leave for the employee. Click to select AM or PM.
Hours/Day Requested	The number of hours per day for which you are requesting leave is automatically calculated based on the **Start Time** and **End Time** of the leave request. If the field is not automatically calculated, you must manually type the number of hours per day for which you are requesting leave. An LEA setting determines whether or not this field is automatically calculated.
Total Requested	Indicates the total amount of requested leave in the specified units.
Remarks	Type any comments related to your leave request. The comments are available to all approvers.

The leave balance amounts translate to hours or days based on the assigned unit type for the selected leave type.

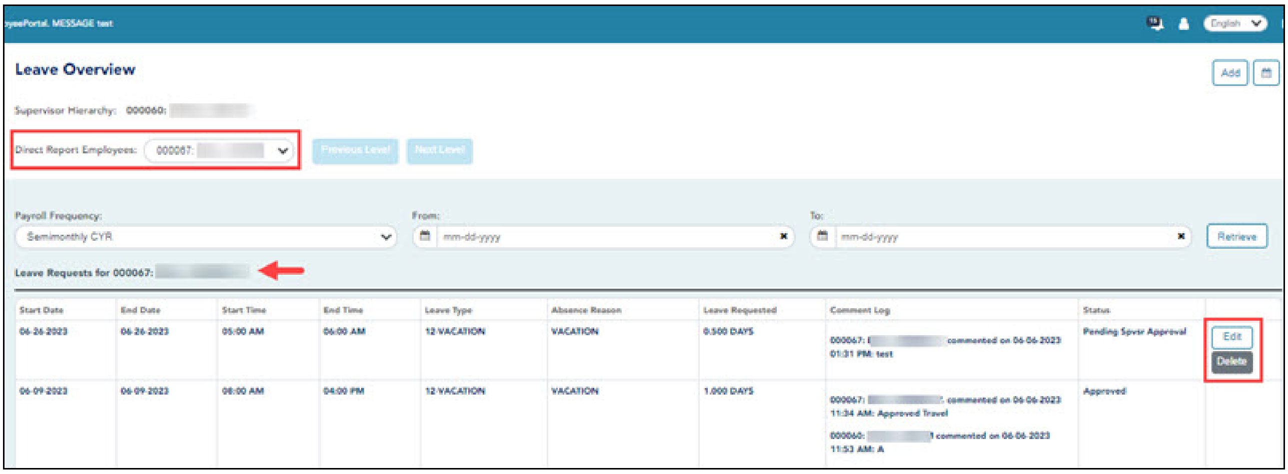
Leave Type	The specific leave codes for which you have leave data are displayed. The leave types are first displayed in the order that is set on the pay check (called stub position), and then leave type code (01-99) order.
Beginning Balance	The leave balance as of the beginning of this year for each leave type is displayed.
Advanced/Earned	The number of units of leave advanced or earned as of the last pay period is displayed.
Pending Earned	The total leave earned but not yet processed through payroll is displayed.
Used	The number of units of leave used as of the last pay period is displayed.
Pending Used	The total leave pending and approved but not yet processed through payroll is displayed. This amount is subtracted from the **Available Balance** field.
Available	Indicates the number of units of leave still available for use. The **Available** is based on beginning balance, plus advanced/earned, plus pending earned, less used, and less pending used.
Units	Indicates the type of units (hours or days) that are used when calculating leave requests.

❏ After completing the leave request entry, use one of the following options to continue:

- Click **Submit and Add** to submit the leave request. As a supervisor submitting a leave request on behalf of your direct employee, the leave request will be automatically approved and you will remain on the Create Leave Requests window to continue adding additional leave request entries.
- Click **Submit and Close** to submit the leave request. As a supervisor submitting a leave request on behalf of your direct employee, the leave request will be automatically

approved and the Create Leave Requests window is closed.
  - Depending on the leave type, additional approvers may be in the approval path for the leave request.
  - If you are set as the temporary approver for your supervisor, and you enter a leave request when your supervisor is unavailable, the request is submitted to your supervisor's supervisor. You are not allowed to approve your own leave requests.
  - When a leave request is approved or disapproved, an email message is automatically sent to the email address listed on your demographic record notifying you of the action.
- Click **Cancel** to close the Create Leave Requests window without submitting any leave requests and return to the Leave Requests page.

If the employee has any pending leave requests, the **Edit** and **Delete** buttons are displayed.



Edit a leave request:

❑ You can edit a leave request until it is processed by payroll.

Edit	Click **Edit** next to the leave request that you want to edit. The Edit Leave Requests window opens. Make the necessary changes and click **Resubmit for Approval** to resubmit the edited leave request for approval. Otherwise, click **Cancel** to return to the Leave Requests page.

Delete a leave request:

❑ You can delete a leave request until it is processed by payroll.

Delete	Click **Delete** next to the leave request that you want to delete. A message prompting you to confirm deletion is displayed. Click **OK** to delete the leave request. Otherwise, click **Cancel** to return to the Leave Requests page.

2. View leave calendar.

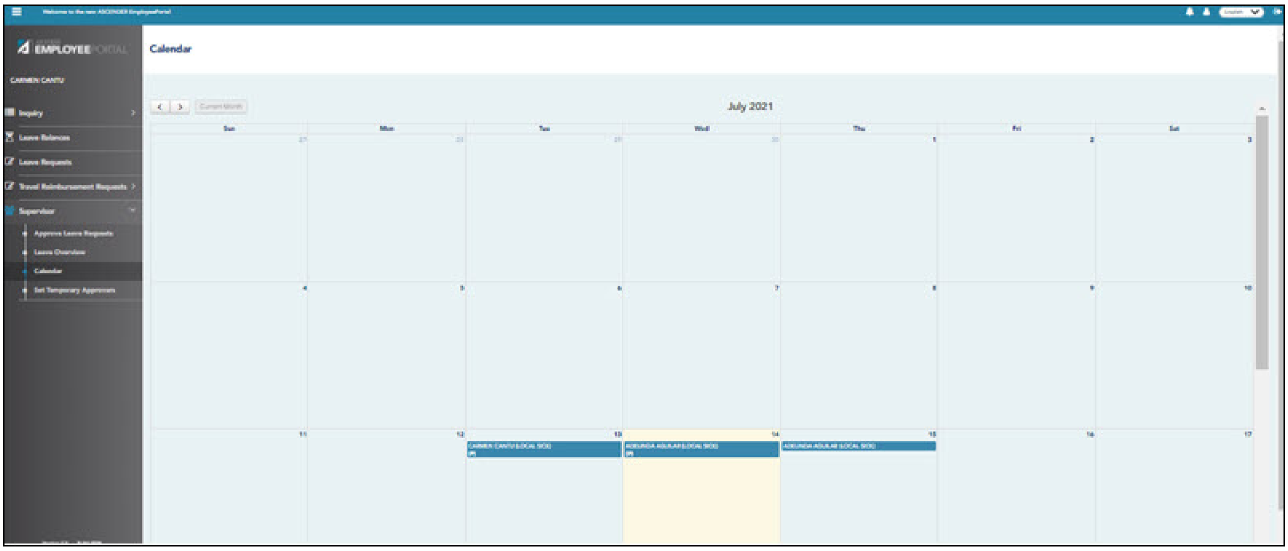
EmployeePortal > Supervisor > Calendar

This page provides a calendar view of all leave requests for yourself, your direct report employees, and any employees who report to them.

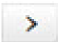
If this page is disabled, check with your district administrator, as the district may have opted not to allow access.

When you access this page, a view of the current month calendar is displayed.

View leave requests:



❑ Click a leave request entry from the calendar to open a window with the leave details.

- Click  to view the previous month.
- Click  to view the next month.
- Click **Current Month** to view the current month. The **Current Month** button is only enabled if you are viewing a prior or future month.

❑ Click **X** or **Cancel** to close the leave request details window and return to the calendar view.

IIII. Set Temporary Approvers

1. Set temporary approvers.

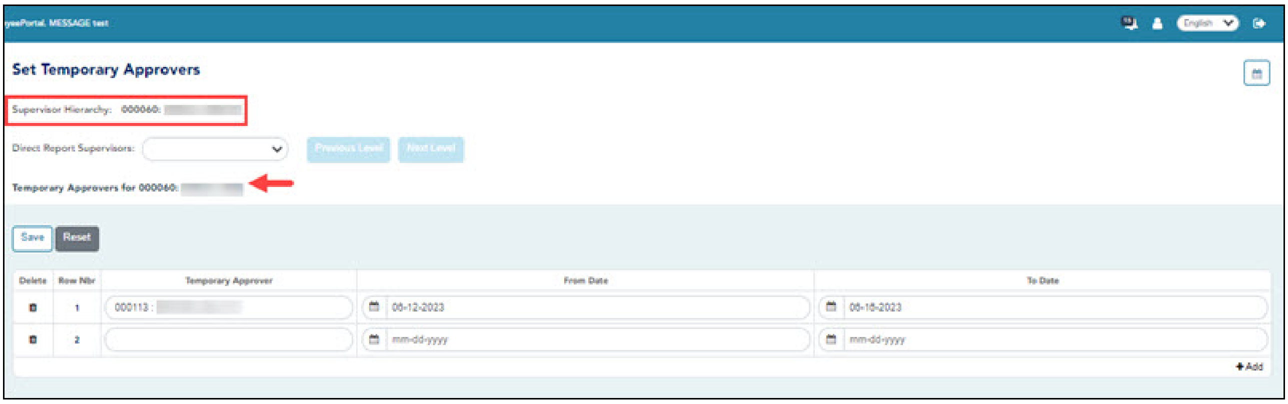
EmployeePortal > Supervisor > Set Temporary Approvers

This page is used to temporarily assign your approval duties to an alternate approver. You can provide a date range during which you are not available and specify the temporary approval path.

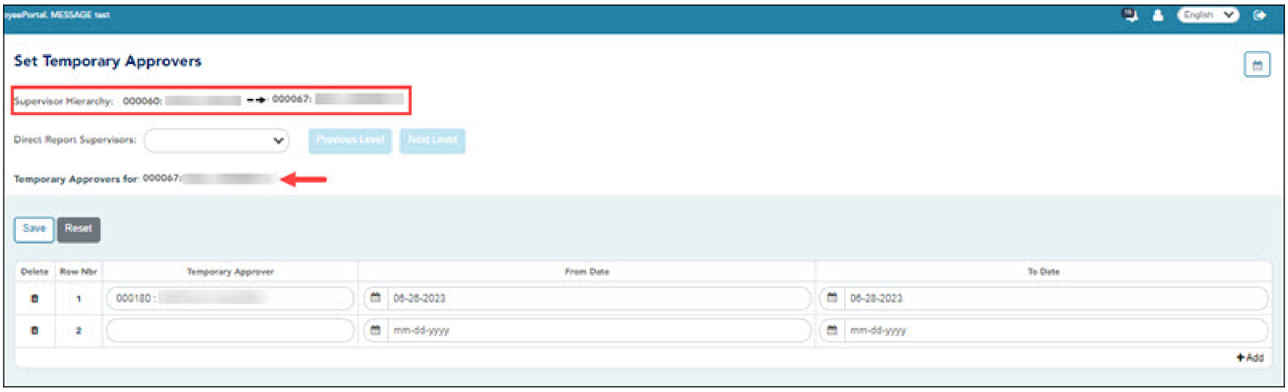
Temporary approvers must have an employee record in Personnel (not a non-employee record created in District Administration) with an email address and an active user profile with an employee number in Security Administration. If you are the next approver in the temporary approval path during the date range in which you are not available, the temporary approver replaces you in the approval path and receives an email message prompting him to take action on any submitted leave requests.

If this page is not enabled, check with your EmployeePortal administrator as the LEA may have opted to not allow access.

When you access this page, your employee number and name are displayed in the **Supervisor Hierarchy** field and a list of your temporary approvers is displayed if any. Proceed to the **Set a Temporary Approver** section to continue.



❏ If you need to set a temporary approver for one of your direct report supervisors, select the supervisor name in the **Direct Report Supervisors** field and click **Next Level**.



Direct Report Supervisors	Click ⌄ to view a list of your direct report supervisors. Select a supervisor's name and click **Next Level**. The selected supervisor name is moved to the **Supervisory Hierarchy** level and a list of temporary approvers and date ranges is displayed. Follow the steps to set a temporary approver for the selected supervisor. Click **Previous Level** to return to the list of temporary approvers for the previous level of supervisor hierarchy.

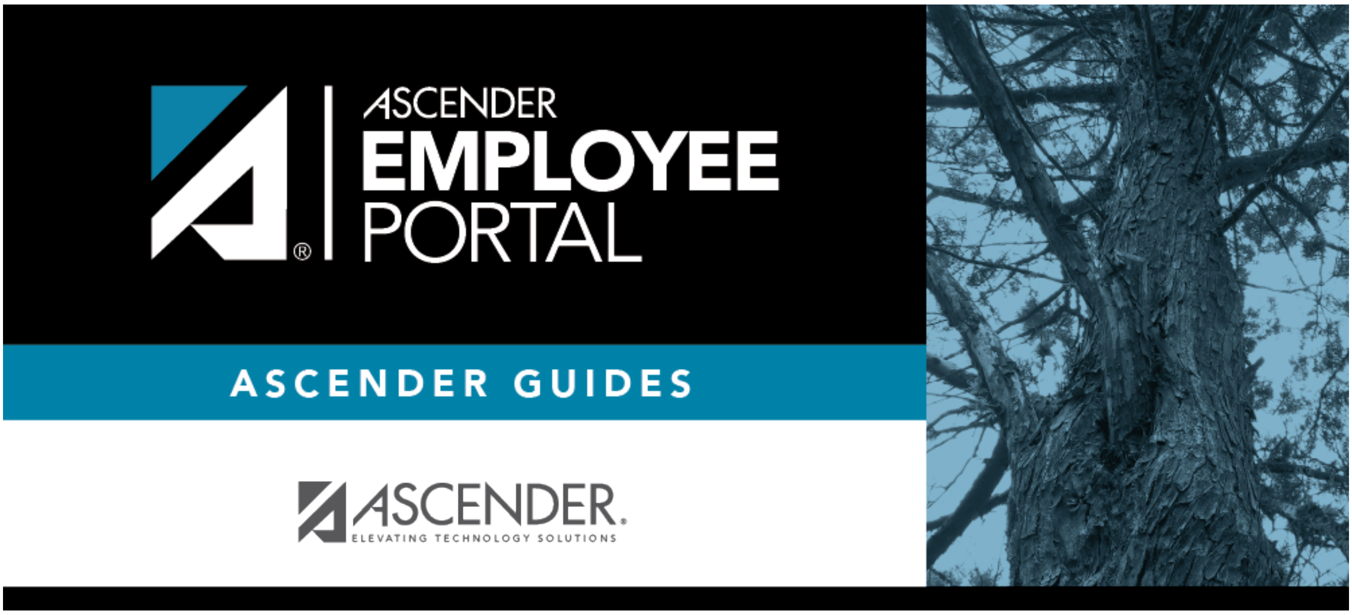
Set a temporary approver:

Field	Description
Temporary Approver	Begin typing the temporary approver's name or employee number. As you type the data, a drop-down list of corresponding data is displayed. Or, press SPACEBAR to display a drop-down list of available temporary approvers. Select the desired temporary approver. **Note**: Employee names are only populated in this field if: • The employee is set up in Security Administration with an employee number and the user profile is not deleted. • The employee is an actual local education agency (LEA) employee (i.e., not set up as a non-employee in District Administration).
From Date	Type the beginning date on which the temporary approver will begin to serve as the approver in the approval path in the MMDDYYYY format. Or, click to select a date from the calendar.
To Date	Type the ending date on which the temporary approver will end serving as the approver in the approval path in the MMDDYYYY format. Or, click to select a date from the calendar. The to date must be after the from date.

❑ Click **Save**. The temporary approver is saved in the approval path and replaces you during the specified date range.

Other functions and features:

+ Add	Click to add a row to the grid.
	Click to delete the association of a temporary approver with an approver. The row is highlighted red to indicate that it will be deleted when the record is saved.
Reset	Click to clear the data in the fields.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ELEVATING TECHNOLOGY SOLUTIONS

Back Cover