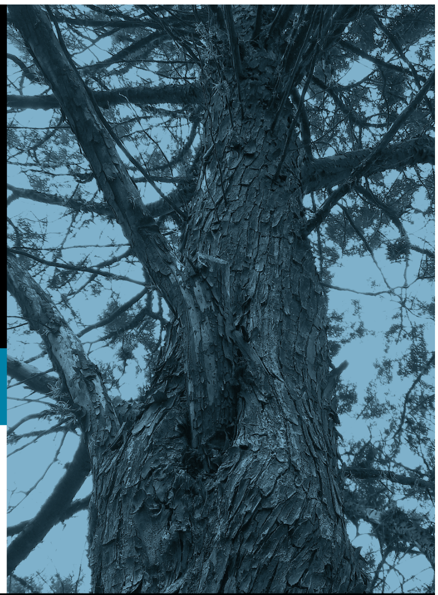
ASCENDER EMPLOYEE PORTAL

ASCENDER GUIDES

ASCENDER ELEVATING TECHNOLOGY SOLUTIONS



Employee Guide

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Employee Guide: Login, Data Inquiries, Self Service & Leave Requests

Welcome to ASCENDER EmployeePortal. This site provides you with access to various employee data inquiries and maintenance features.

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

In addition, you can create, edit, delete, and submit leave requests. EmployeePortal also offers self-service maintenance pages that allow you to view and submit changes to your demographic and payroll information such as changes to your address, withholding and exemption status, and direct deposit settings. Some changes may require additional approval or documentation, which is predetermined by your LEA.

Your local education agency (LEA) determines the pages and data fields that can be viewed and/or edited in EmployeePortal. If you have questions, please contact your EmployeePortal administrator.

Before You Begin

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

I. Log on to EmployeePortal, Create an Account, & Manage Passwords

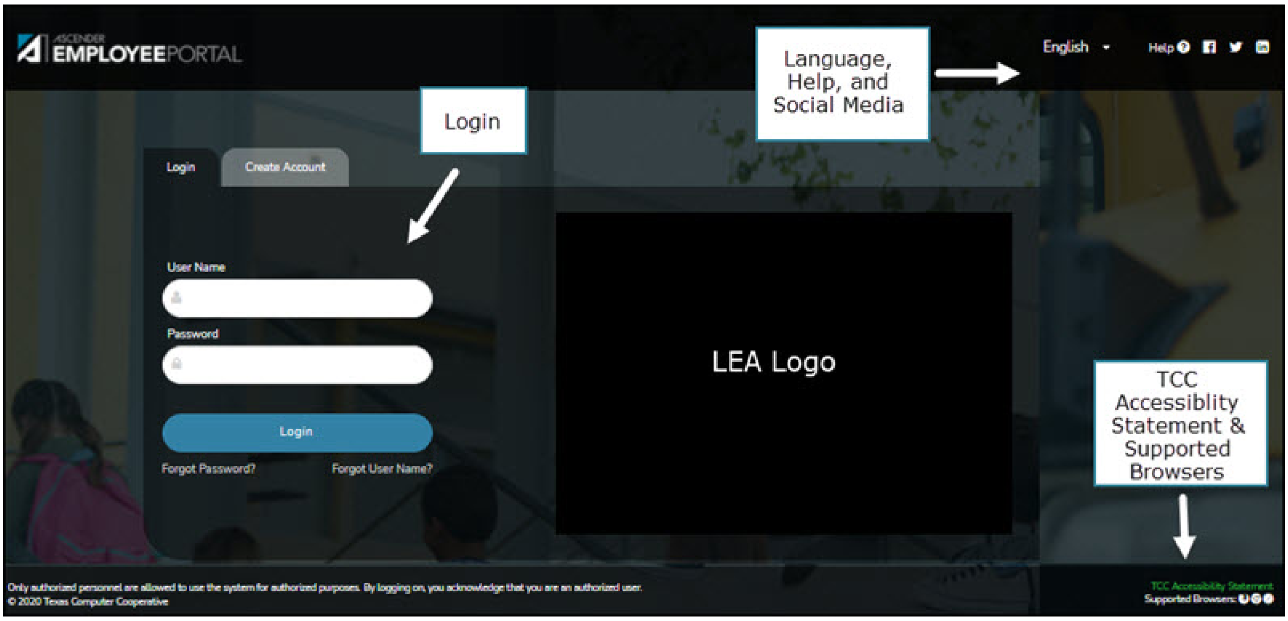
To access the ASCENDER EmployeePortal, you must log on.

- If you are a new user and do not have an ASCENDER EmployeePortal account, you must create an account.

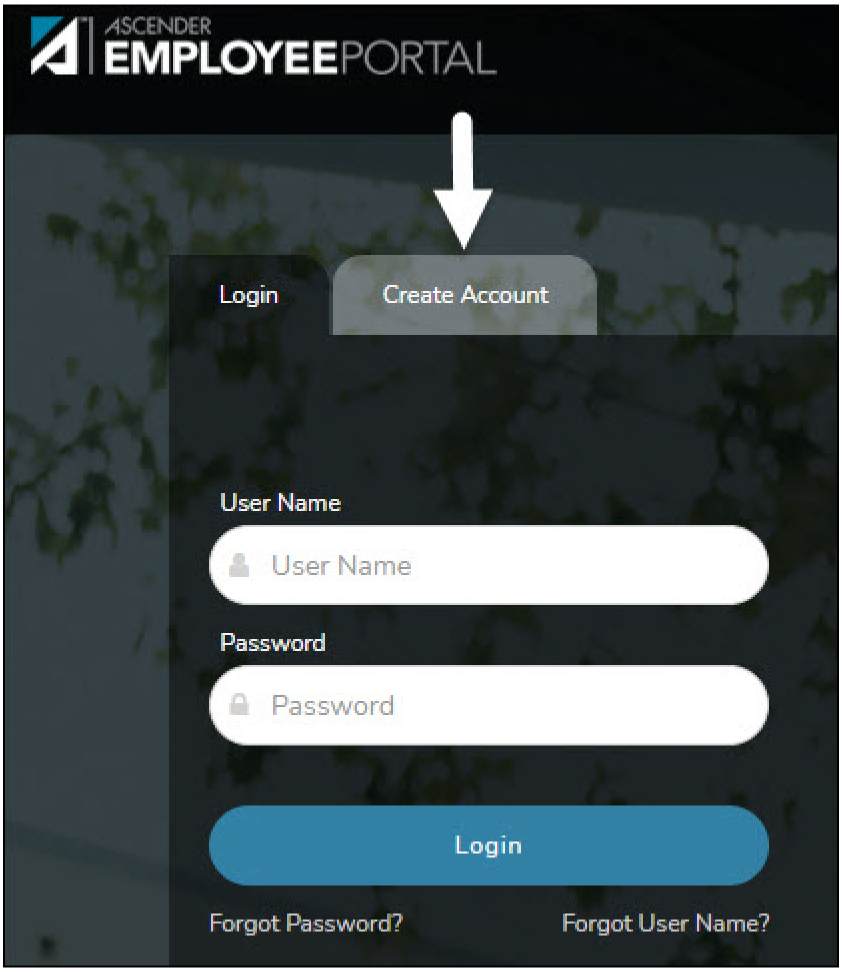
1. Log in as a new user.

ASCENDER EmployeePortal > Create Account

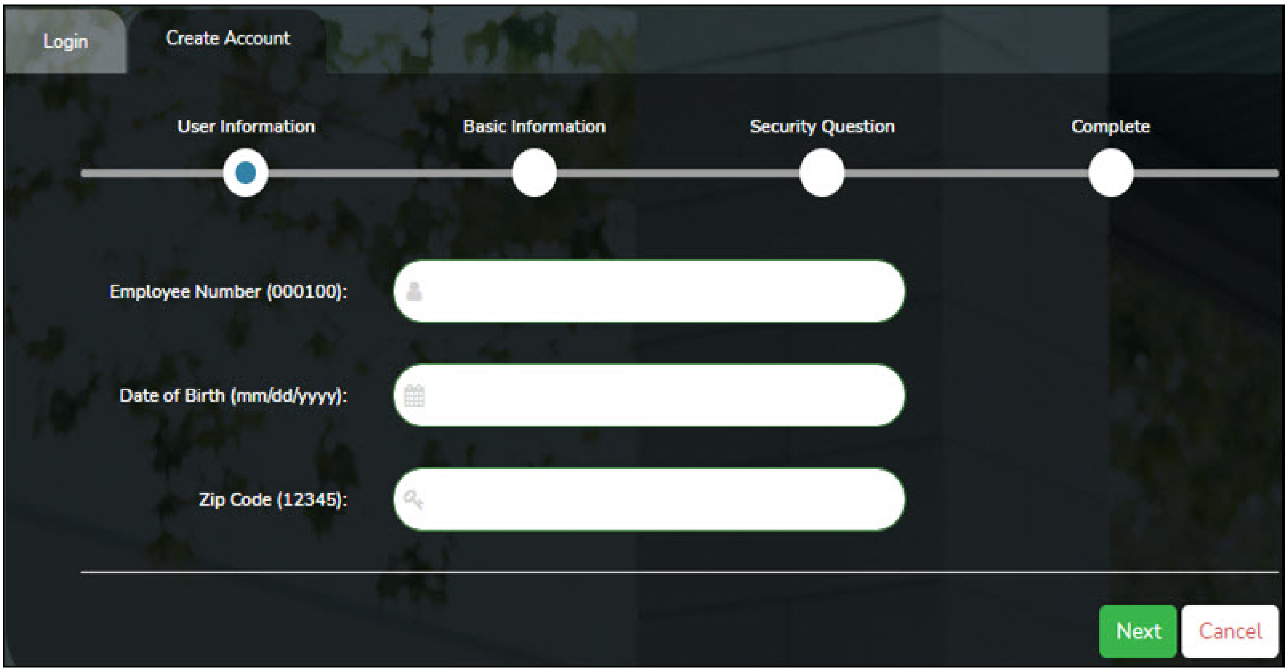
If you are a new user, access the EmployeePortal link provided by your LEA. When you access EmployeePortal, the Login page is displayed.



❏ From the Login page, click **Create Account**.



User Information

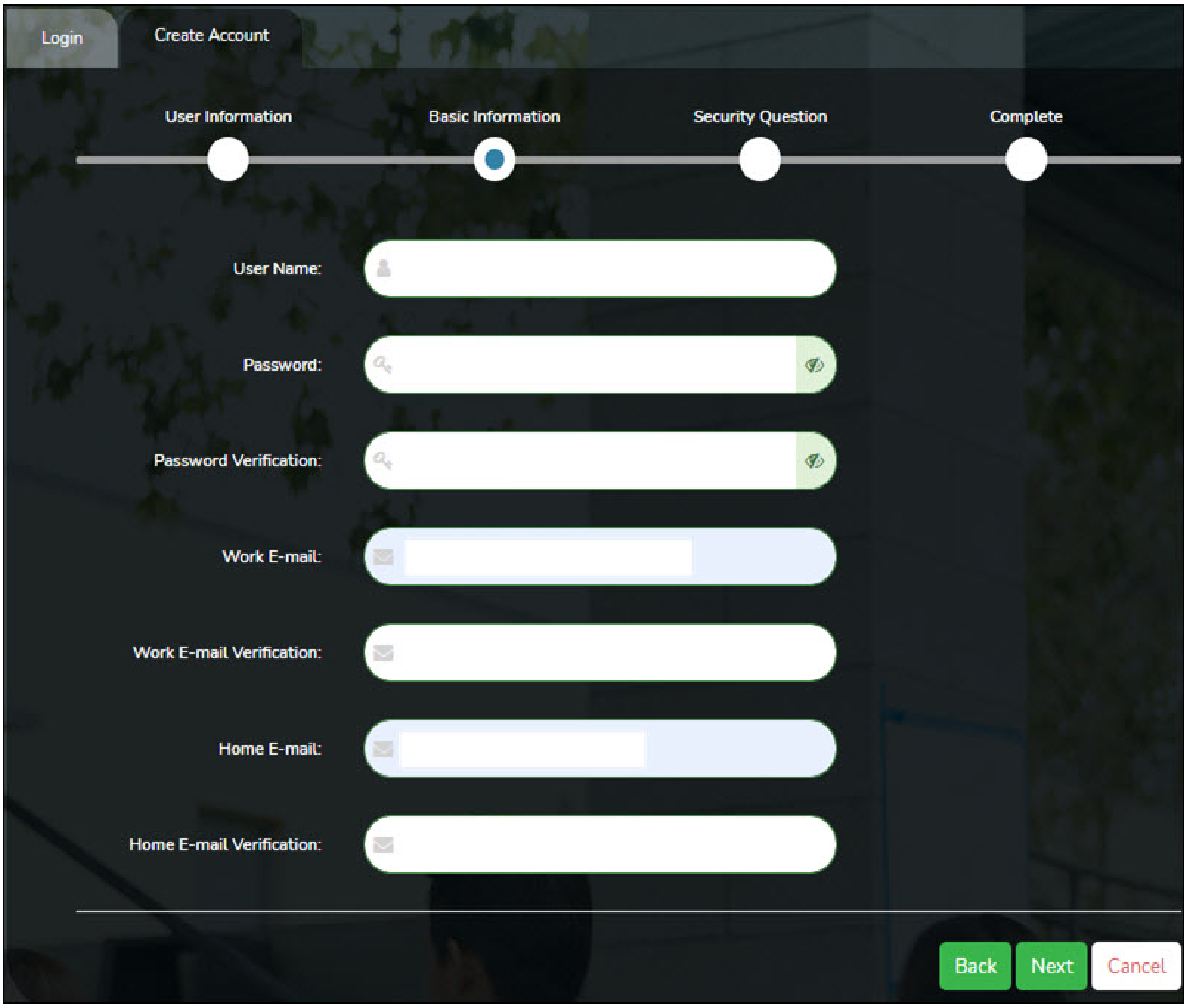


Employee Number or Social Security Number	Depending on your LEA's settings, you are prompted to enter either your employee number or your nine-digit social security number.
Date of Birth	Type your birth date in the mm/dd/yyyy format.
Zip Code	Type your five-digit zip code.

❑ Click **Next**.

- The entered data is verified to ensure that you are authorized to use EmployeePortal.
- If you already created an account, a message is displayed prompting you to contact your personnel department.
- The **Employee Number** or **Social Security Number**, **Date of Birth**, **Zip Code**, **Last Name**, and **First Name** fields cannot be modified.

Basic Information

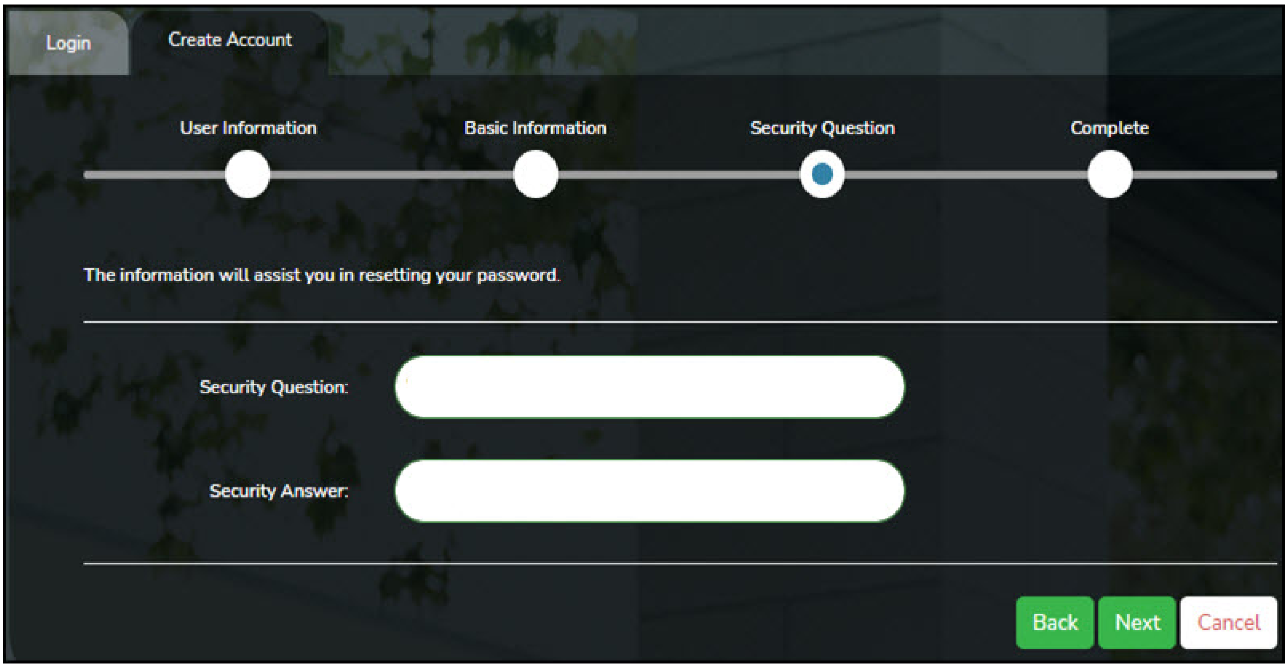


User Name	Type a 6-25 character user name. (No embedded spaces are allowed.) The name must be unique within the LEA; it is not case-sensitive.
Password	Type a new password. A show/hide toggle allows you to view or mask the characters you are typing. Requirements: • 8-46 alphanumeric characters • Three of the following: uppercase, lowercase, numeric, and special characters • Case-sensitive

Password Verification	Retype the password that you typed in the **Password** field.
Work E-mail	Type the work email address if it does not display. If a work email address already exists, this field cannot be modified.
Work E-mail Verification	Retype the work email address that you typed in the **Work E-mail** field (if available for modification).
Home E-mail	Type the home email address if it does not display. If a home email address already exists, this field cannot be modified.
Home E-mail Verification	Retype the home email address that you typed in the **Home E-mail** field (if available for modification).

❏ Click **Next**.

Security Question

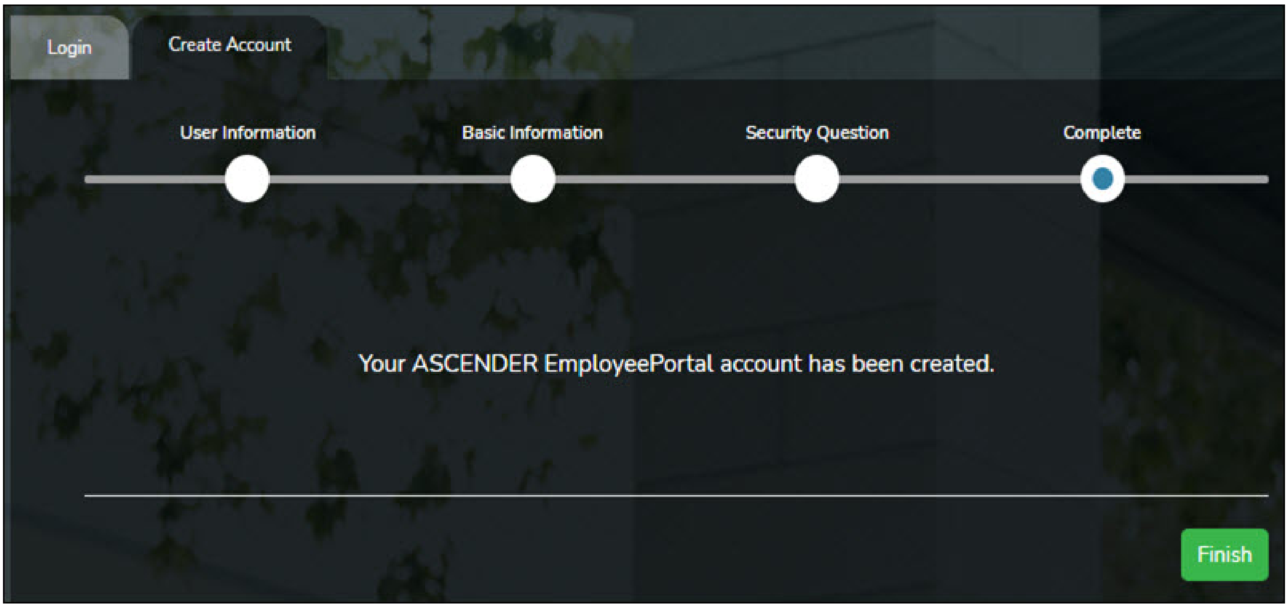


Security Question	Type a question you will be asked in the event that you forget your password at a later date.
Security Answer	Type the answer to the security question. This is case-sensitive.

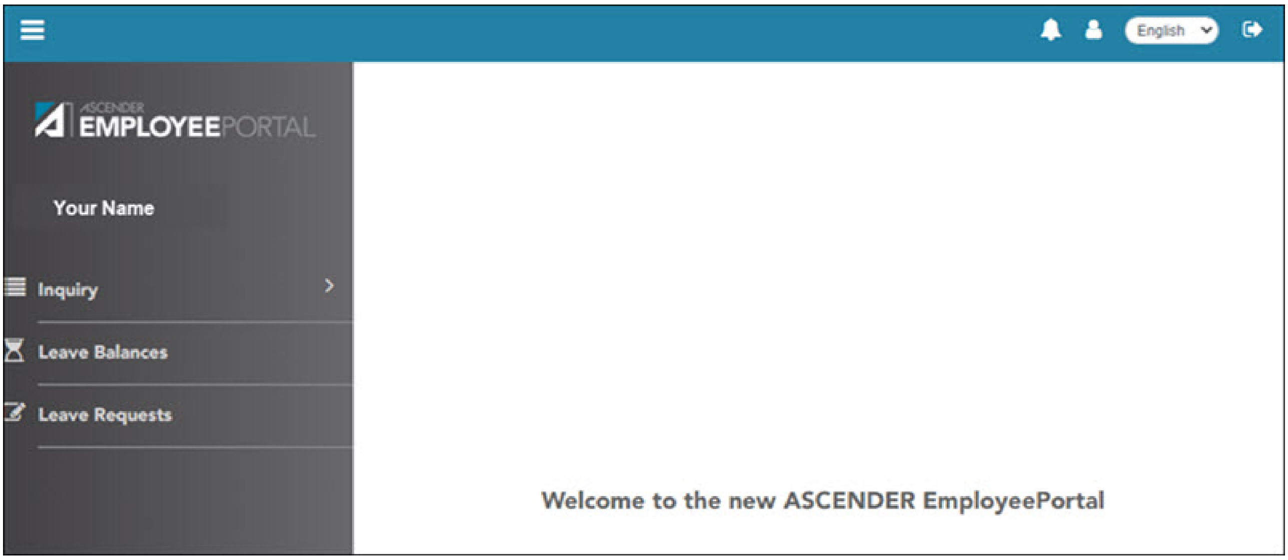
❏ Click **Next**.

Complete

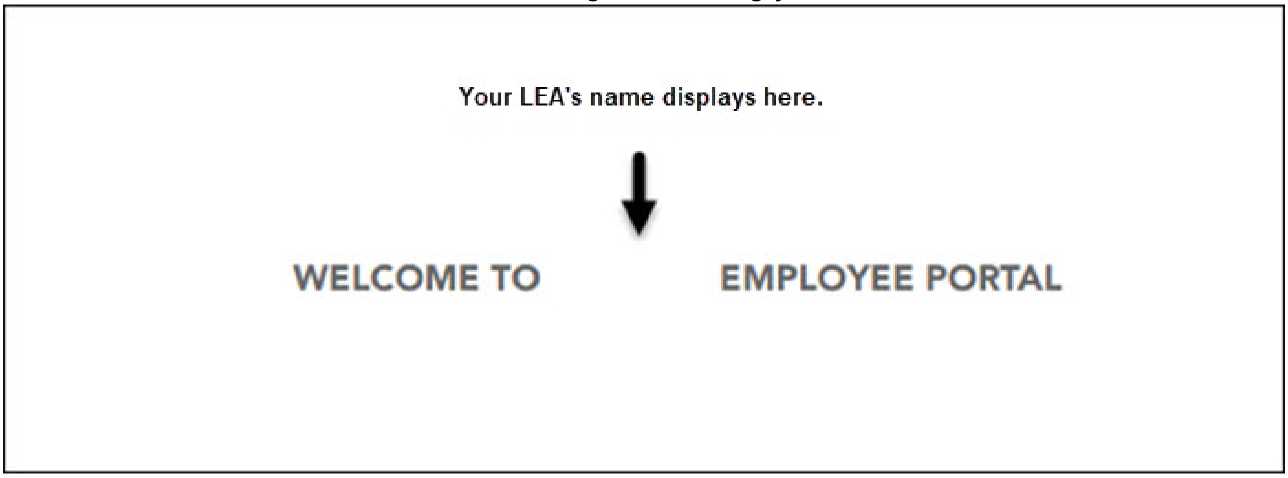
❏ Click **Finish**.



The ASCENDER EmployeePortal homepage is displayed indicating that you have successfully logged on to the portal.



You will receive a confirmation email message containing your user name.



Thank you for Registering for Employee Portal. Your User ID is:

*****THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY*****

2. Log in as an existing user.

ASCENDER EmployeePortal > Login

If you are an existing user, access the EmployeePortal link provided by your LEA. When you access EmployeePortal, the Login page is displayed.

IMPORTANT: If you are an existing TxEIS Employee Access user, log on using your same user name and password.

❑ Enter the following information:

User Name	Type the user name you entered when you created your ASCENDER EmployeePortal account. Your user name is not case-sensitive.
Password	Type your password. Requirements: • 8-46 alphanumeric characters • Three of the following: uppercase, lowercase, numeric, and special characters • Case-sensitive

❑ Click **Login**. The EmployeePortal homepage is displayed.

WARNING! Other password requirements such as the number of invalid password attempts, lockout period, and the number of password expiration days are set by your district administrator.

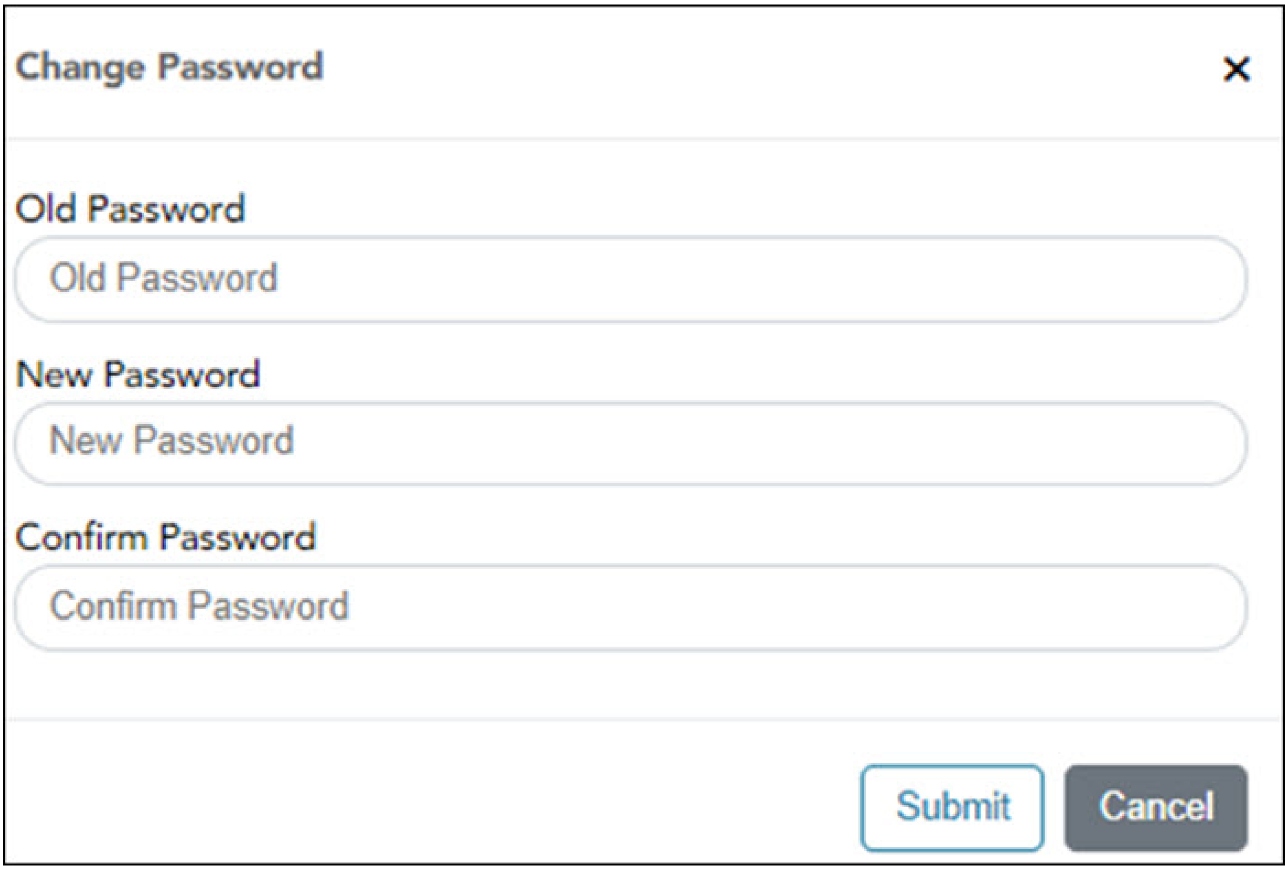
3. Change password.

ASCENDER EmployeePortal > Change Password

This page is used to change your current password. If you forgot your password, use the Forgot Password page to reset your password. If you are locked out of your account, contact your LEA's EmployeePortal administrator.

Access the EmployeePortal link provided by your LEA. When you access EmployeePortal, the Login page is displayed. After you have successfully logged on to the portal, the EmployeePortal homepage is displayed. Click your name in the upper-left corner or click at any time to access the Self-Service Profile page.

❑ Click **Change Password**. The Change Password window opens.



Old Password	Type your old (current) password.
New Password	Type your new password. The password minimum is 8 and the maximum is 46.
Confirm Password	Retype your new password to confirm.

❑ Click **Submit** to update your current password to the new password. Otherwise, click **Cancel** to close the window without saving any changes. You will receive a confirmation email message notifying you that your password changed.

Your request to change your password was successful.

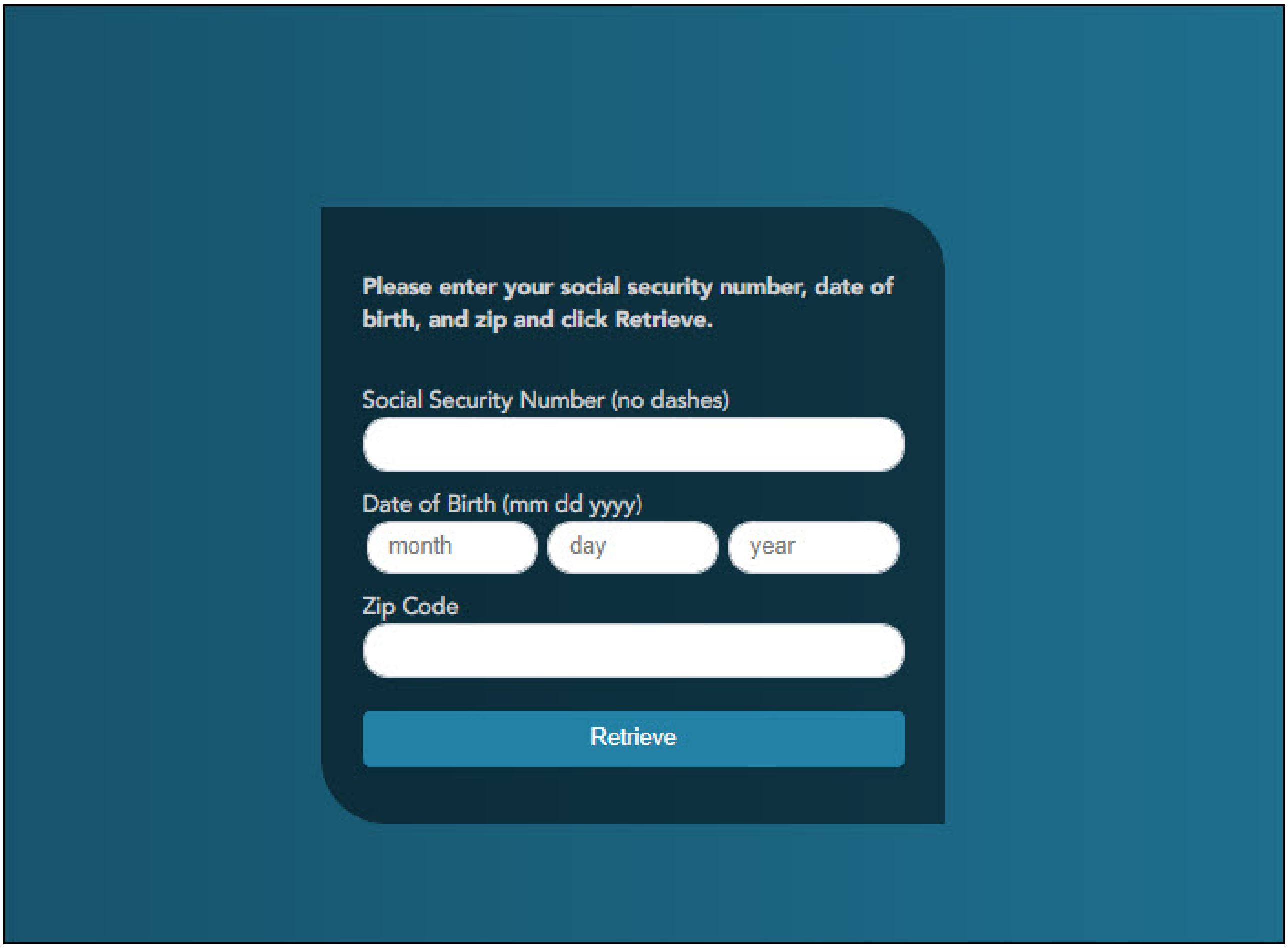
*****THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY*****

4. Forgot password.

ASCENDER EmployeePortal > Forgot Password

This page is used to reset your password if you forgot it. If you are an existing user and you know your current password and want to change it, use the Change Password page. If you are locked out of your account, contact your EmployeePortal administrator.

❏ From the EmployeePortal Login page, click **Forgot Password**. The Forgot Password page is displayed.

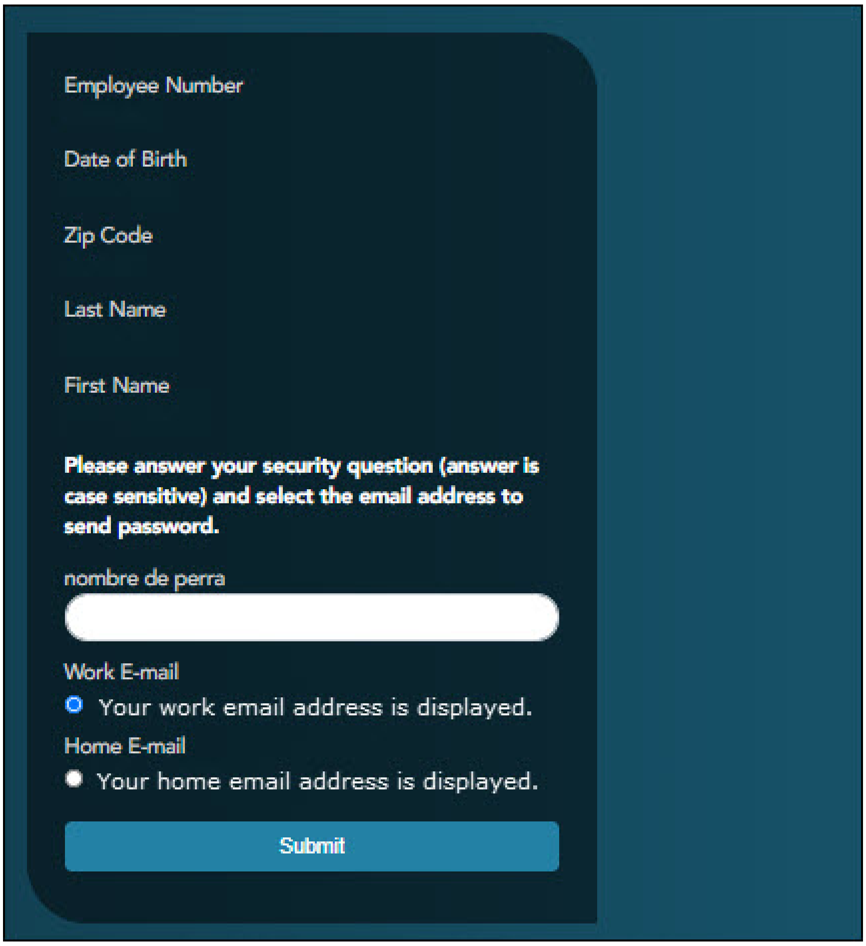


Employee Number or Social Security Number	Depending on your LEA's settings, you are prompted for either your employee number or your nine-digit social security number.
Date of Birth	Type your birth date in the MMDDYYYY format.
Zip Code	Type your five-digit zip code.

❑ Click **Retrieve**.

- The entered data is verified to ensure that you are authorized to use EmployeePortal.
- The **Employee Number** or **Social Security Number**, **Date of Birth**, **Zip Code**, **Last Name**, and **First Name** fields cannot be modified.

❑ You are prompted to answer the security question that you entered when you created your user account.



- In the answer field, type the answer to the security question.
- You have three opportunities to answer the question correctly.
- If the question is not correctly answered, the answer is protected, and you are prompted to call your EmployeePortal administrator to have your user account deleted. Once your user account is deleted, you can use the Create Account page to create your account again.

❑ Click **Submit**. You are redirected to the EmployeePortal Login page. An email message containing your temporary password is sent to your email address.

❑ Obtain your temporary password from your email and return to the EmployeePortal Login page. The temporary password is only valid for 24 hours.

❑ Type your user name and the temporary password and click **Login**. You are redirected to the Change Password page. Follow the instructions for changing your password.

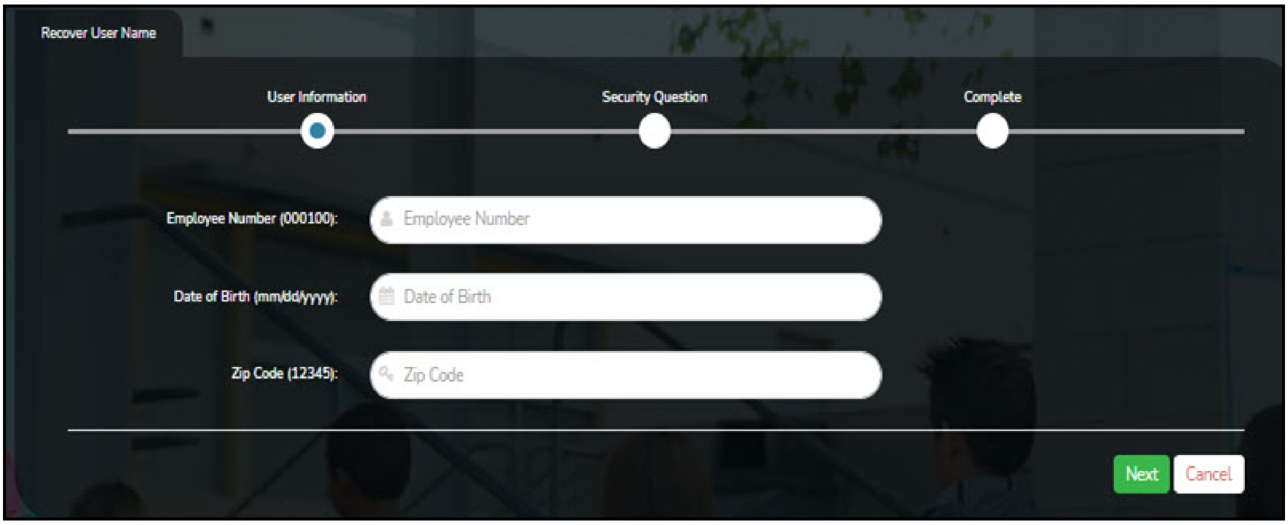
5. Forgot user name.

ASCENDER EmployeePortal > Forgot User Name

This page is used to recover your user name if you forgot it.

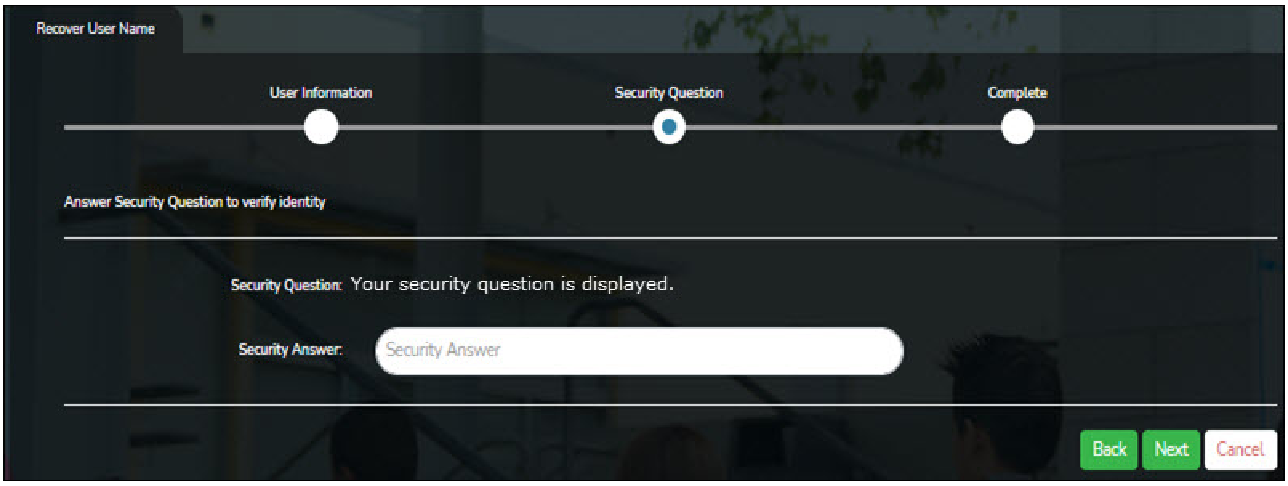
❑ From the EmployeePortal Login page, click **Forgot User Name**. The Recover User Name page is displayed.

User Information



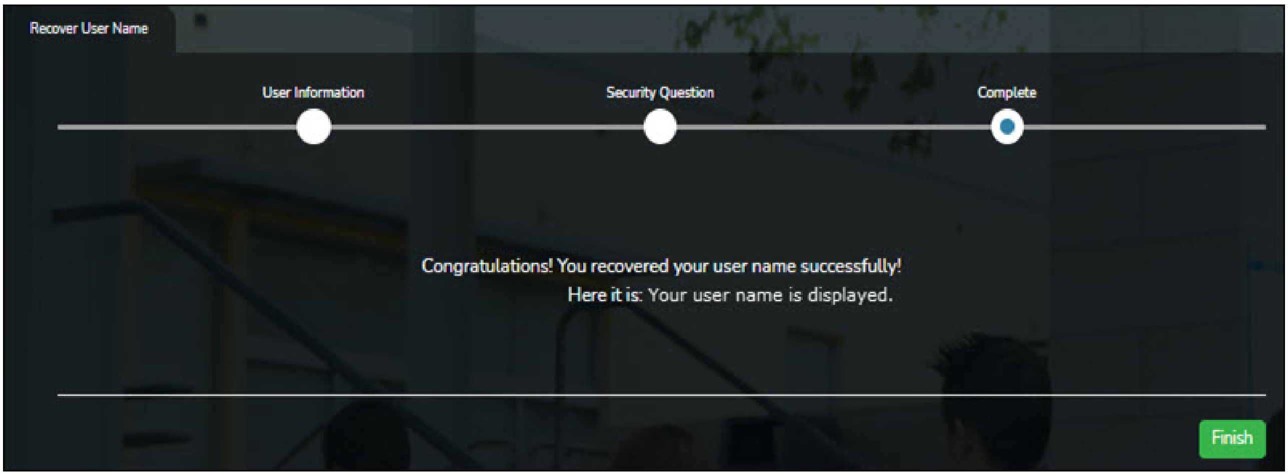
Employee Number or Social Security Number	Depending on your LEA's settings, you are prompted for either your employee number or your nine-digit social security number.
Date of Birth	Type your birth date in the MMDDYYYY format.
Zip Code	Type your five-digit zip code.

Security Question



Security Question	Type a question you will be asked in the event that you forget your password at a later date.
Security Answer	Type the answer to the security question. This is case-sensitive.

❑ Click **Next**.



❑ Click **Finish**. You are redirected to the EmployeePortal Login page.

II. Perform Employee Data Inquiries

Use the Inquiry menu to perform various inquires on payroll, leave, and tax information. The following data inquiries are available. Review the applicable online Help pages for information about specific fields.

1. Calendar Year to Date.

   EmployeePortal > Inquiry > Calendar Year to Date

   This page is used to view a year-to-date summary of various earnings information by payroll frequency. You can also view prior year information.

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

If a message is available from your LEA, it is displayed in red at the top of the page.

2. Current Pay Information.

EmployeePortal > Inquiry > Current Pay Information

This page is used to view your current pay information.

If you requested modifications such as changes to your withholding and exemptions, and those changes are not displayed, the district has yet to process the changes.

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

If a message is available from your LEA, it is displayed in red at the top of the page.

3. Deductions.

EmployeePortal > Inquiry > Deductions

This page is used to view your current payroll deduction information. If applicable, the employer's contributions to the deductions are also displayed in addition to your withholding status and the number of exemptions.

If you have requested modifications to your deductions and those changes are not displayed, the district has yet to process the changes.

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

If a message is available from your LEA, it is displayed in red at the top of the page.

4. Earnings.

EmployeePortal > Inquiry > Earnings

This page is used to view earnings and direct deposit information. The information is per pay date and frequency. You can view 18 months of earnings or the last 50 pay dates. If you are on multiple frequencies, the pay dates and associated frequency are displayed.

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

If a message is available from your LEA, it is displayed in red at the top of the page.

5. W-2 Information.

   EmployeePortal > Inquiry > W-2 Information

   This page is used to view your W-2 information. Additionally, you can indicate how you want to receive and access your W-2 form; electronically or printed, by mail. Previous year and frequency combinations are available for selection. Official W-2s can be printed from calendar year 2009 or greater. W-2s from years prior to 2009 can be viewed but not printed.

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

   If a message is available from your LEA, it is displayed in red at the top of the page.

   In addition, you can use this page to indicate your W-2 electronic consent preference. If you have not previously indicated your electronic consent preference, the W-2 Electronic Consent window opens when you access the W-2 Information page. You can change your electronic consent preference at any time.

   ❏ Click **W-2 Consent**. The W-2 Electronic Consent window opens with information about your consent.

   The **W-2 Consent** button is only displayed if the option is enabled by the LEA or service center.

   - Select **Yes** if you consent to electronic access of your W-2 form and agree to access your W-2 form electronically as described in the instructions, and print your own W-2 form. If selected, you will not receive a printed, mailed copy of your W-2 form.
   - Select **No** to decline electronic consent and receive a printed, mailed copy of your W-2 form.
   - Click **Save** to save your consent election. Otherwise, click **Cancel** to close the window without making a selection. If you do not make a selection, your W-2 form will be printed and mailed.

   Notes:

- You can print a copy of your W-2 form regardless of your selected consent preference.
- You can change your consent preference at any time.
- You will receive an email message confirming your selected preference.
- The confirmation email is sent to the email address listed on your demographic record. The email is sent to either the work or home email address; whichever is available. If both are available, the email is sent to the work email address.

❏ Click **Print** to display a printable PDF version of your Form W-2 Wage and Tax Statement.

6. 1095 Information.

EmployeePortal > Inquiry > 1095 Information

This page is used to view your 1095 information. Additionally, you can indicate how you would like to receive and access your 1095 form; electronically or printed, by mail. Official 1095 forms can be printed and viewed from calendar year 2015 and greater.

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

If a message is available from your LEA, it is displayed in red at the top of the page.

In addition, you can use this page to indicate your 1095 electronic consent preference. If you have not previously indicated your electronic consent preference, the 1095 Electronic Consent window opens when you access the 1095 Information page. You can change your electronic consent preference at any time.

❏ Select **1095-B** to display your 1095-B data for the selected calendar year.

OR

❏ Select **1095-C** to display your 1095-C data for the selected calendar year.

❏ Click **1095 Consent**. The 1095 Electronic Consent window opens with information about your consent.

The **1095 Consent** button is only displayed if the option is enabled by the district or service center.

- Select **Yes** if you consent to electronic access of your 1095 form and agree to access your 1095 form electronically as described in the instructions, and print your own 1095 form. If selected, you will not receive a printed, mailed copy of your 1095 form.

- ◦ Select **No** to decline electronic consent and receive a printed, mailed copy of your 1095 form.
- ◦ Click **Save** to save your consent election. Otherwise, click **Cancel** to close the window without making a selection. If you do not make a selection, your 1095 form will be printed and mailed.

Notes:

- ◦ You can print a copy of your 1095 form regardless of your selected consent preference.
- ◦ You can change your consent preference at any time.
- ◦ You will receive an email message confirming your selected preference.
- ◦ The confirmation email is sent to the email address listed on your demographic record. The email is sent to either the work or home email address; whichever is available. If both are available, the email is sent to the work email address.

❑ Click **Print** to display a printable PDF version of the Form 1095-B or 1095-C.

III. Perform Self Service Updates

Use the Employee Self Service page to submit changes to your personal demographic and payroll information. All submitted changes are considered “pending” until approved by your LEA. Review the online Help page for information about specific fields.

1. Update demographic and payroll information.

ASCENDER EmployeePortal > Self-Service

This page is used to enter and request updates to your demographic and payroll information. Your information as it currently exists in your record is displayed.

You can also change your password from this page. Click Change Password and follow the appropriate steps.

Click your name in the upper-left corner or click at any time to access the Self-Service Profile page.

❑ The fields that you are allowed to view and update are determined by your LEA. Your submitted changes may go through an approval process.

❑ Your current information is displayed in the **Current** and **New** columns.

    - The **Current** column is display only.
    - The **New** column is only enabled if the LEA allows updates to the data. If the **New** column fields are enabled, you can enter your changes and click **Save**. The data is saved and submitted for approval.
    - Pending requests are highlighted yellow after the changes are submitted.
        - If approval is not required, the changes are made immediately.
        - If the requests are pending approval, you can continue to change your request until it has been approved and updated in the system.
    - Click **Undo** to revert the data to its original state. A message is displayed confirming that you want to cancel your changes.
        - Click **OK** to cancel your requested changes.
        - Otherwise, click **Cancel** to close the message without changing your request.
    - If the fields are not automatically updated, an email message is sent to the applicable approver prompting them to approve the submitted changes.
    - You will receive an automatic reply email containing the changes and informing you that the changes are pending approval.

❏ To delete information, delete the data in the **New** column and click **Save**.

❏ If a change is made more than once for the same field, the most recent change overrides the previous one.

❏ Some fields may require you to submit documentation to your employer. If documentation is required, the fields are identified in the automatic reply email message.

Payroll:

Under **W4 Marital Status Information**:

❏ To delete information, delete the data in the **New** column and click **Update**.

❏ Click **Undo** to return the data to its original state. A message is displayed confirming that you want to cancel your changes.

Under **Direct Deposit Bank Accounts**:

❏ Click **Add** to add a new financial institution to have your paycheck directly deposited.

❏ Click **Delete** to delete a financial institution from your record.

❏ To delete information, delete the data in the **New** column and click **Update**.

❏ Click **Undo** to return the data to its original state. A message is displayed confirming that you want to cancel your changes.

IV. View Leave Balances & Manage Leave Requests

1. View leave balances.

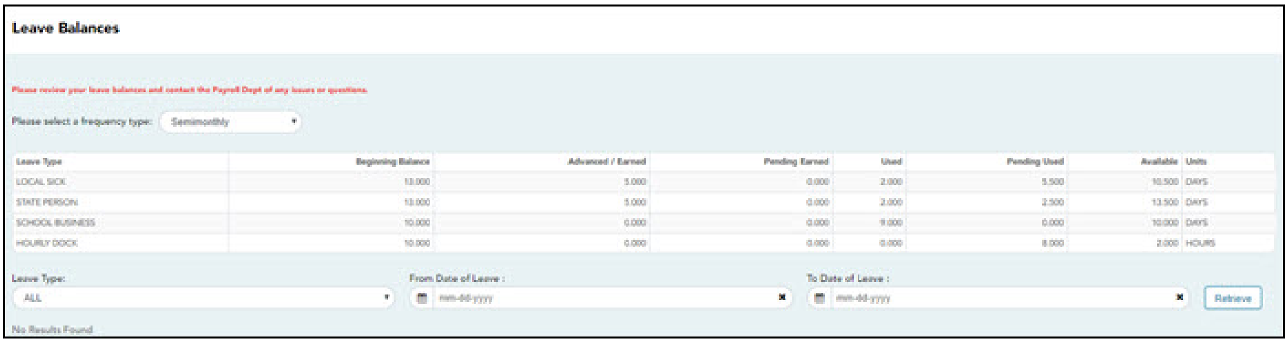
ASCENDER EmployeePortal > Leave Balances

This page is used to view leave information as it currently exists in your record for the selected frequency.

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

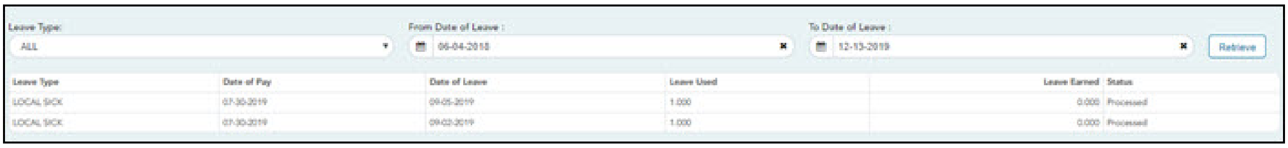
If a message is available from your LEA, it is displayed in red at the top of the page.

View leave balance data:



Please select a frequency type	Click ⌄ to select the payroll frequency for which you want to view leave balances.
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.

View a specific range of leave data:



❑ Use the following fields to filter the information by date range and/or leave type.

Leave Type	Click ⌄ to select the type of leave for which you want to view leave data. The leave type description is displayed.
From and To Date of Leave	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.

❑ Click **Retrieve**. A list of leave requests for the specified date range is displayed with the following data:

Leave Type	The leave type description for the leave request is displayed.
Date of Pay	The pay date for which leave was charged is displayed.
Date of Leave	The date for which the leave was taken is displayed in the mm dd yyyy format.
Leave Used	The number of units of leave taken is displayed.
Leave Earned	The number of units of leave earned is displayed.
Status	Indicates the status of the leave (processed, not processed, or not posted to payroll). The data displayed here depends on certain district option settings. For example, if you know you have leave that has not gone through payroll processing, then the feature to display unprocessed leave was disabled by the district. Processed - The leave has been processed through payroll and posted to your leave master record. Not processed - The leave has not been processed through payroll and is not yet a part of your leave master record. Processed and not processed leave units have already been added to/subtracted (as appropriate) from your master leave record and are reflected in the leave grid. The **Available** field is reflective of what is available should all unprocessed leave be posted.

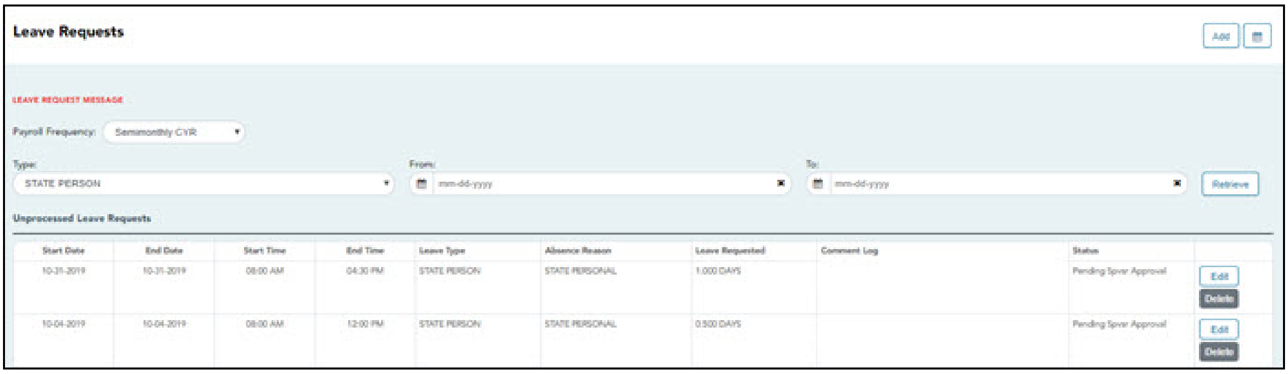
2. Create, edit, and delete leave requests.

ASCENDER EmployeePortal > Leave Requests

This page is used to create, edit, delete, and submit leave requests for the selected payroll frequency. After a leave request is processed by payroll, it is no longer displayed on this page.

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

If a message is available from your LEA, it is displayed in red at the top of the page.



Payroll Frequency	Click to select the payroll frequency for which you want to create a leave request. If you have leave in multiple payroll frequencies such as biweekly, semimonthly, and monthly, those options are displayed and can be selected.

Under **Unprocessed Leave Requests**, a list of your unprocessed (not processed by payroll) leave requests is displayed, if any. The following details are displayed for each leave request:

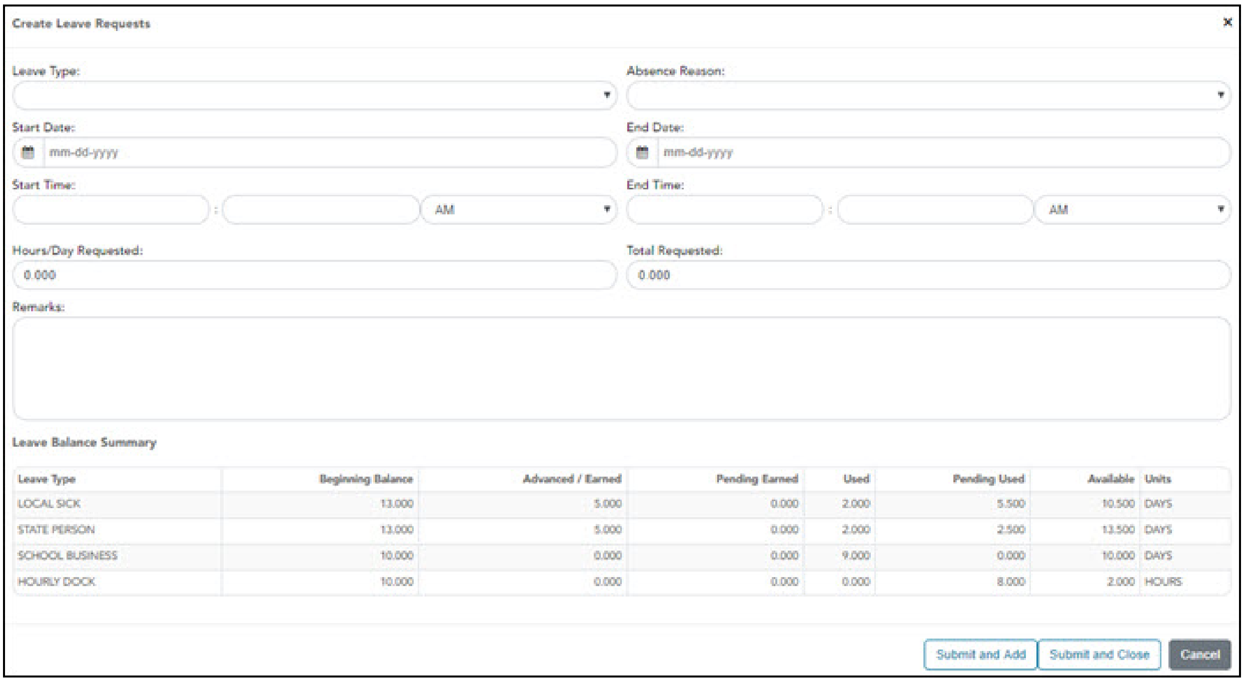
Start and End Date	The start and end date range for the leave request is displayed in the MMDDYYYY format.
Start and End Time	The start and end time range for the leave request is displayed in the HH MM format.
Leave Type	The type of requested leave is displayed.
Comment Log	Any employee (requestor) comments that were added to the leave request are displayed.

Status	The current status of the leave request is displayed. When a leave request is created, an email message is automatically sent to your direct supervisor notifying him of the request and prompting him to approve or disapprove the leave request. The status of the leave request is updated to *Pending Spvsr Approval*. After a leave request is approved by your supervisor, an email message is automatically sent to the email address listed on your demographic record notifying you of the action. The status of the leave request is updated to *Pending Payroll*. If a leave request is disapproved by your supervisor, an email message is automatically sent to the email address listed on your demographic record notifying you of the action. The status of the leave request is updated to *Disapproved*. You can edit and resubmit the leave request or delete the leave request. After a leave request is processed by payroll, it is no longer displayed on this page.

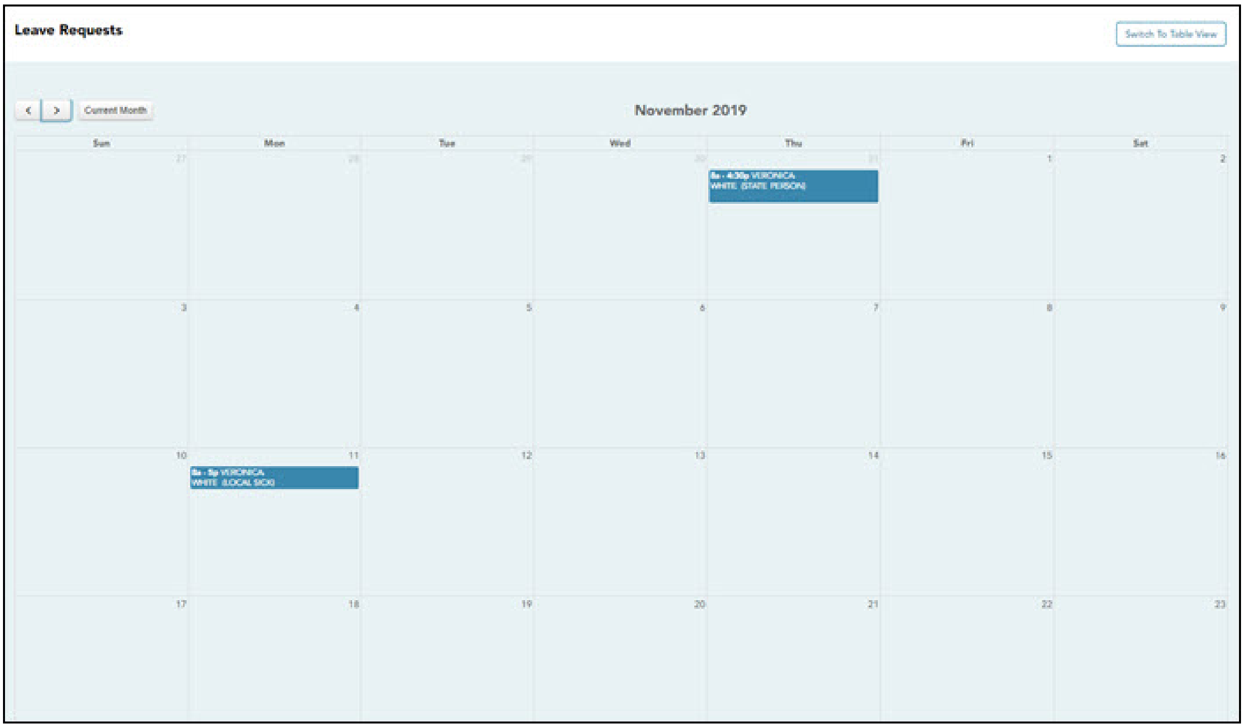
Create a leave request:

❑ You have two options to create a leave request.

- Click **Add** in the upper-right corner of the page. The Create Leave Requests window opens.



- Click 📅. A view of the current month calendar is displayed. You can click an existing leave request from the calendar to view the details.



- Click the calendar day for which you want to create a leave request. The Create Leave Requests window opens. The **Start Date** and **End Date** fields are automatically populated with the date you selected.
  - 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 **Switch to Table View** to return to the table display.

Your leave balances are displayed at the bottom of the Create Leave Requests window.

❑ Complete the following information for the leave entry:

Leave Type	Click to select the type of leave that you want to request. Only leave types assigned to you are displayed. An LEA setting determines whether or not you can use a leave type with a zero balance. 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 district and correspond to the selected leave type.
Start Date	Type the start date for which you want to request leave 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 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. Click to select AM or PM.
End Time	Type the end time in the HH MM format for which you want to request leave. 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. A district 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 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	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 your leave request entry, use one of the following options to continue:

- Click **Submit and Add** to submit the leave request to your supervisor for approval and remain on the Create Leave Requests window to continue adding additional leave request entries.
- Click **Submit and Close** to submit the leave request to your supervisor for approval and close the Create Leave Requests window.
  - A leave request is created and an email message is sent to your direct supervisor notifying him that there is a leave request pending approval.
  - 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.

Edit a leave request:

❏ You can edit a leave request until it is processed by payroll in which case, the leave request is no longer displayed under **Unprocessed Leave Requests**.

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 in which case, the leave request is no longer displayed under **Unprocessed Leave Requests**.

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.