Sutter Health
Sutter Shared Services

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Frequently Asked Questions:
Ascend—Paperless Expense Reimbursement System

Q: What is Ascend?

A: Ascend is the name of the new electronic system employees will use to report business expenses and request reimbursement. Ascend will eliminate paper expense reports.

Q: How does Ascend work?

A: By using the Ascend system, you can:

- Create an electronic reimbursement request form
- Scan your receipts and upload them to your expense report.
- Alternatively, you can take a picture of your receipts and email them to yourself for uploading into the system
- Electronically route expense reimbursement requests to your manager for approval. Once your manager signs off on the reimbursement request, Ascend automatically routes the form to Payroll, cutting down on turnaround time
- View the status of your expense report

Q: How do I access Ascend?

A: You can access Ascend directly through this link http://ascend/. You can also access it via a link in My Sutter Connection. To log in to Ascend, you must be connected to the Sutter Health server. You can log in to Ascend using your Sutter network login ID and password.

Q: What if my password is not working?

A: Ascend will not accept a password with an apostrophe. Please ensure an apostrophe is not included in your Sutter network password. Contact the IS Service Desk at http://is.sutterhealth.org for technical help with changing your network password.

Q: Is training available for the Ascend system?

A: Yes. To learn how to use Ascend, we highly recommend that you take the Ascend Web-based training. This self-paced, Web-based training module is also available within the Ascend system by clicking the “Training” link on the left-hand navigation menu. (You must be connected to the Sutter Health server to access the training.)

Q: What are the deadlines for submitting expense reimbursement requests through Ascend and when will I be paid?

A: Completed and manager-approved expense requests submitted via Ascend by the Friday before pay day will be paid within the next pay period

Q: Where can I find the new Reimbursement of Business Expenses policy?

A: The new Reimbursement of Business Expenses policy is available within the Ascend system by clicking the “Business Expense Policy” link in the left-hand, “Quick Links” navigation menu or by clicking here.

Q: If I submit a receipt for a meal I purchased while travelling for business and it exceeds the cap implemented with the new Reimbursement of Business Expenses policy, will the entire expense be rejected, or will I be refunded up to the allowed amount?

A: We will not reject the entire expense, but will reimburse up to the allowed amount. As a reminder, meals while on business travel or conducting business for Sutter are reimbursable up to these

amounts, including tip: breakfast $20, lunch $30, dinner $60. Under the new policy, Sutter Health will not reimburse anything that exceeds the allowed amount.

Q: How do I submit a request for reimbursement of a lunch meeting?

A: For group meals involving employees of Sutter Health or its affiliates, select the “Meals (with others)” category from the drop-down menu within the Ascend system when entering the expense. You then list the number of other guests and their names and indicate they are Sutter Health employees. The $30 per-employee cap applies, but the actual expense of the meal must be entered on the reimbursement request. You can note on your receipt, “Cap at $30 per employee,” so your approver will see you are claiming a reimbursement within the guidelines.

Q: Do I need to upload each receipt individually, or can I combine multiple receipts?

A: Receipts –including scanned receipts and image files from your smartphone—can be combined and submitted together. The Ascend system will accept most common file formats, including .jpeg, .tiff, .gif, .txt, .doc, .docx, .pdf, .xls and .xlsx. Make sure the receipts are legible, and all facing the same direction, so your manager can view them easily.

Q: If I travel to multiple work locations within one day, do I need to enter the address of each location I visited when submitting my mileage reimbursement request?

A: No, you can enter the information as a summary of your activities for the day. In the business purpose, note the reason for your travel, such as “sales calls” or “meetings at various work sites.” Choose a starting point and end point, and fill in total mileage. Add additional details on the second line, if needed. View the examples in the Ascend training module for detailed instructions.

Q: How do I submit an employee gift card reimbursement?

A: In the Ascend system, choose the “Gift Card” category when completing “Step 3 – Expenses.” Enter the employee’s name in the “Receiving Gift” field. If you gave gift cards to multiple employees, enter each employee name separately by clicking “Add Item.” You must include the names of employees who received the gift cards on the expense report. Please note that **all gifts cards are considered cash equivalents and are taxable,** no matter the amount.

Q: Can I charge my expense to a cost center other than the one that automatically populates? A: Yes. You can manually enter a cost center in the “Cost Center” field in “Step 2 – Mileage, Parking, Tolls” and “Step 3 – Expenses.” For example, if your home cost center is 618515, you can charge your expense to a different cost center by typing that cost center in the “Cost Center” field.

Q: Can I split my expenses among multiple cost centers?

A: Yes. You can split the cost of expenses for mileage and other expenses by clicking the icon next to “Split Information.” If, for example, your total expenses are $100, you can expense $50 to your home cost center and $50 to a different cost center.

Q: How do I know if my expense report has been approved?

A: You will know your expense report is approved when the status reads “APPROVED.”

Q: What do I do if a reimbursement was approved and the info on it was incorrect?

A: Once approved, the expense can no longer be edited in Ascend. Please contact the employee support line, called the Sutter Health Employee Line, at 916-297-8300 or toll-free at 1-855-398-1631. Representatives are available Monday-Friday, 7 a.m.-5 p.m., with a voicemail option for calls placed after hours.

When calling the Sutter Health Employee Line, you will be prompted to:

- Enter your employee ID number

• Choose option 2 for Payroll help

Q: What if my supervisor is out on a leave of absence and my expense reports are still going to him or her for approval?

A: If your supervisor is out on leave and unable to assign a delegate in Ascend, your supervisor's next level-up manager should:

- Log on the IS Service Portal at http://is.sutterhealth.org
- Click on the blue I Need Something icon, then click through the following items Business Services => Workforce Management => General Human Resource Service
- In the resulting form, indicate whomever is desired to be set up as a delegate and how long the delegation should remain in effect and click the submit button.

If you submitted your expense report to someone on leave, you can recall the report and resubmit it to the new delegate, once the new delegate is established and it will.

Q: How can I submit expense reports on behalf of my manager?

A: Your manager should do the following to add you as a proxy:

- Log on the IS Service Portal at http://is.sutterhealth.org
- Click on the blue I Need Something icon, then click through the following items Business Services => Workforce Management => General Human Resource Service
- In the resulting form, simply indicate whomever is desired to be set up as a proxy and click the submit button.
- Once completed, a message will be sent confirming the request is fulfilled.

Q: Will I be able to access expense reports I've submitted as a proxy?

A: Once a report is submitted, only the person it was prepared for can edit it. Proxies cannot edit others' reports.

Q: Who can I call for help and support?

A: You may call a dedicated employee support line, called the Sutter Health Employee Line, at 916297-8300 or toll-free at 855-398-1631. Initially, we'll staff this line from 7 a.m. to 5 p.m., with a voicemail option for calls placed after hours. (We expect to extend these hours in 2014.) When calling the Sutter Health Employee Line, you will be prompted to:

- Enter your employee ID number
- Choose option 2 for Payroll help

Approvers

Q: Who can approve expense reports in the Ascend system?

A: All supervisors and above will be able approve employee expense reports in Ascend. Ascend will automatically route expense reports to the employee's direct supervisor based on the employee's job profile in Lawson.

Q: What is the approval process for Ascend? A:

The normal approval process is as follows:

- You will receive an email each time one of your direct reports submits an expense report. That email will contain the link to that employee's expense report.
- You will have seven (7) days from the time you receive that email to approve the expense report. This was recently increased from four days.
- Ascend will automatically escalate the expense report to the next-level approver if it is not approved within seven days. This process will ensure timely reimbursement for employees.
- You can delegate your approval rights to another manager for a specific time period, if you will be out of the office. Make sure you delegate to someone who is a supervisor or above. Please

watch the “Approvers – Delegating Authority” portion of the Ascend Web-based training to learn how to delegate your approval authority.

- We recommend adding a recurring weekly reminder to your Outlook calendar to ensure you approve your direct reports’ expense reimbursement requests within the seven-day window, as you will not receive a reminder email.
- You can approve all expense reports at the same time. After logging into the Ascend system at http://ascend/, you will see all reports requiring your approval listed on the Ascend home page in the “To Do” box.

Q: What is the escalation process for approving expense reports in Ascend?

A: Ascend will automatically escalate an expense report to the next-level approver if it is not approved within seven days.

Q: What if the Ascend routes or escalates an expense report to the wrong approver?

A: Ascend follows the HR hierarchy established in Lawson. If Ascend routes the approval to the incorrect first-line approver or escalates to the incorrect second-line approver, a manager should correct the Lawson hierarchy by following the ePAN process for a supervisor change.

Q: What does it mean if Ascend says a report has “timed out”?

A: “Timed out” means the report has been sent to the next-level approver.

Q: What if I reject an expense report?

A: Ascend will send the expense report back to the employee to revise and resubmit.