



ASCENDER[®]
ELEVATING TECHNOLOGY SOLUTIONS

ASCENDER/TxEIS Business Release Notes

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Prior Release Notes for ASCENDER Release 5.0 | TxEIS Release 3.5

[Update 5.0.0218](#)

ASCENDER

Release Date: 7/02/2021 **ASCENDER Update:** 5.0.0218



MemberPortal

The ASCENDER MemberPortal is now available. The MemberPortal allows SSA members to submit grant budget revision requests and reimbursement requests to their respective fiscal agents. This functionality provides fiscal agents a more efficient way to manage grant budget amounts and payments.

[Business Known Issues](#)

[Phase 1: WorkJournal](#)

Phase 1: WorkJournal

Personnel > Tables > Salaries > Extra Duty & Salaries NYR > Extra Duty

Added the **Use for ST OT** and **Display in WJ** check boxes to identify which extra duties will use standard overtime rates and be displayed for the WorkJournal feature in EmployeePortal. These fields are only enabled for G-type and S-type extra duty codes.

☐ Added the functionality to freeze the **Delete**, **Code**, and **Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
 Pay Acty: All
 Wholly Sep: All
 Retrieve Print

Delete	Code	Description	Amount	Include in Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ
	01	1/8 Sal X Period	0.00	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	02	ECHS Dean Sti	5,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	05	HS SUBS COMP ED	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	06	MS SUB REG	12,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	07	MS SUB SP ED	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	08	MS SUB COMP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	09	EL SUBS REG	15,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	10	EL SUBS G/T	10.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	11	EL SUBS SP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	12	EL SUBS COMP ED	2,500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	13	EL SUBS ESL/BI	500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	14	SPLMT WEB MSTR	0.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	17	SPLMT SP ED	3,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	19	SPLMT ESL	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	21	SPLMT, GT	1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

First 1 / 9 Last Add

Tables > Salaries NYR Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY STATE MIN SUBSTITUTE MIDPOINT WORKERS' COMP

Records
 Pay Acty: All
 Wholly Sep: All
 Retrieve

Modify
 By Percent
 By Dollar Amt

Salary
 Amount: 0.00 %
 Default Print

Delete	Code	Description	Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ	Amount	% Increase	New Amount
	01	1/8 Sal X Period			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
	02	ECHS Dean Sti			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5,000.00	0.00	5,000.00
	05	HS SUBS COMP ED			<input type="checkbox"/>	<input type="checkbox"/>	1,000.00	0.00	1,000.00

Personnel > Tables > Job/Contract > Job Codes & Job/Contract NYR > Job Codes

☐ Added the **Time Option**, **Pay Type 2 Dock**, and **Auto Lunch** columns to identify how employees

with certain job codes enter their time and how their time is calculated for the WorkJournal feature in EmployeePortal.

- Added the functionality to freeze the **Delete**, **Job Code**, and **Job Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

Delete	Job Code	Job Description	Workers' Comp Code	FTE Hrs	No FTE	Time Option	Pay Type 2 Dock	Auto Lunch
<input type="checkbox"/>	0000	SUBSTITUTE TEACHER		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0020	HOURLY HOLIDAY PAY	-MAINT/CAFE 0.023622	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0100	SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0101	INTERIM SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0113	ASSISTANT SUPERINTENDENT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0115	BUSINESS MANAGER		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0116	CURRICULUM DIRECTOR		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0120	ADMINISTRATIVE ASST.	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0121	DIRECTOR SPECIAL PROGRAM	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0122	DIRECTOR, FOOD SERVICES		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0125	DIRECTOR, SPECIAL EDUCATION		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0128	FACILITATOR/DAEP		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0129	ADMIN COM ED & ATT		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0130	OCS/DAEP TCHR	-PROF/AIDES/ADMS 0.002436	0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
<input type="checkbox"/>	0133	SUPERVISOR, VOC EDUCATION		0	<input type="checkbox"/>	N None	<input type="checkbox"/>	0

Personnel > Tables > WorkJournal > Options

- Added this tab to set up WorkJournal options such as the employee work week and time conversion tables to be used for the WorkJournal feature in EmployeePortal.

Tables > WorkJournal Personnel

Save

OPTIONS ADMIN

Retrieve Print

Work Week Start Day: Sunday

Work Entry Cutoff Days: 0

Reminder Days: 0

Enable WorkJournal Time for Pay Types:

Pay Type 2 Non-contracted Employee:

Pay Type 3 Hourly Employee:

Time Conversion:

Frequency: 4 - Biweekly CYR

Delete	Up to Minute	Percent of Hour
	0	0 %

+ Add

Personnel > Tables > WorkJournal > Admin

Added this tab to manage a list of WorkJournal admin users who will have access to manage WorkJournal features in EmployeePortal.

Tables > WorkJournal Personnel

Save

OPTIONS ADMIN

Retrieve Print

Delete	Employee Nbr	Employee Name	Primary Campus	Primary Dept
	000001		001	
	000012		001	
	000002		041	
	000126		041	

First 1: 001 - 041 / 1 Last + Add

Phase 2: SSA Fiscal Agent Management

Phase 2: SSA Fiscal Agent Management

Grants and Projects > Maintenance > Approval Dashboard

Added this page to allow signed-on approvers to view a list of all member grant budget revision requests and reimbursement requests awaiting approval for a year/grant type. Approvers can elect to approve all requests, individual requests, or return all requests or individual requests. Additionally, approvers can update the details in an individual request prior to approving or returning the request.

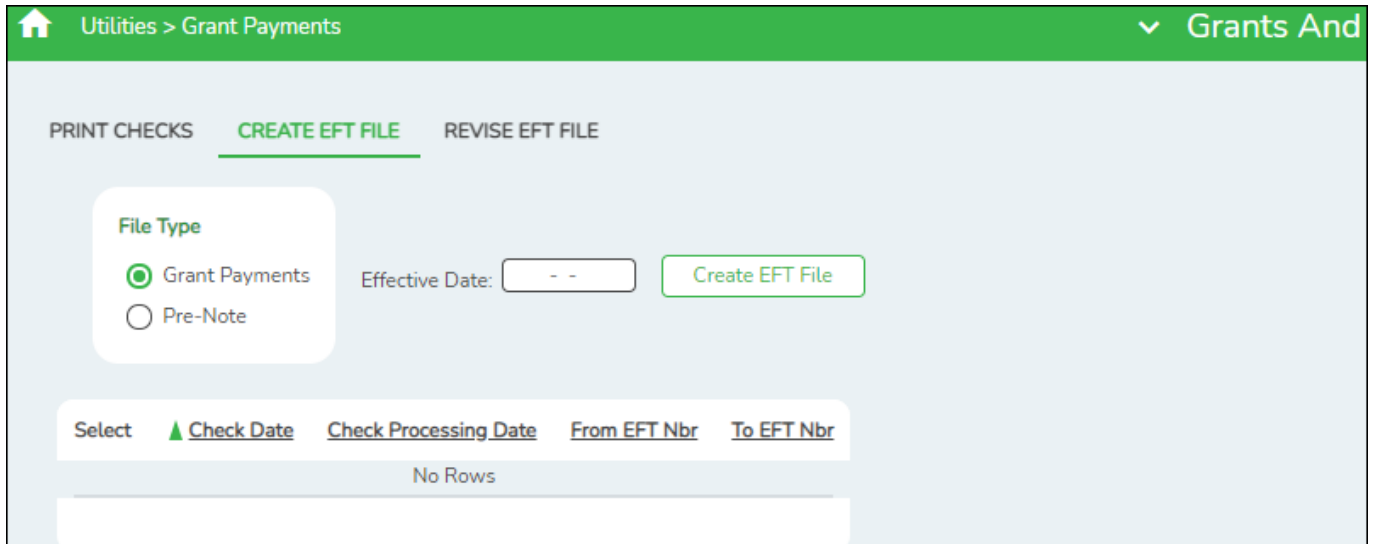
Grants and Projects > Utilities > Grant Payments > Print Checks

Added this tab to process member reimbursement request payments to the member's vendor via check or electronic funds transfer, and then post the transactions to Finance.

Grants and Projects > Utilities > Grant Payments > Create EFT File

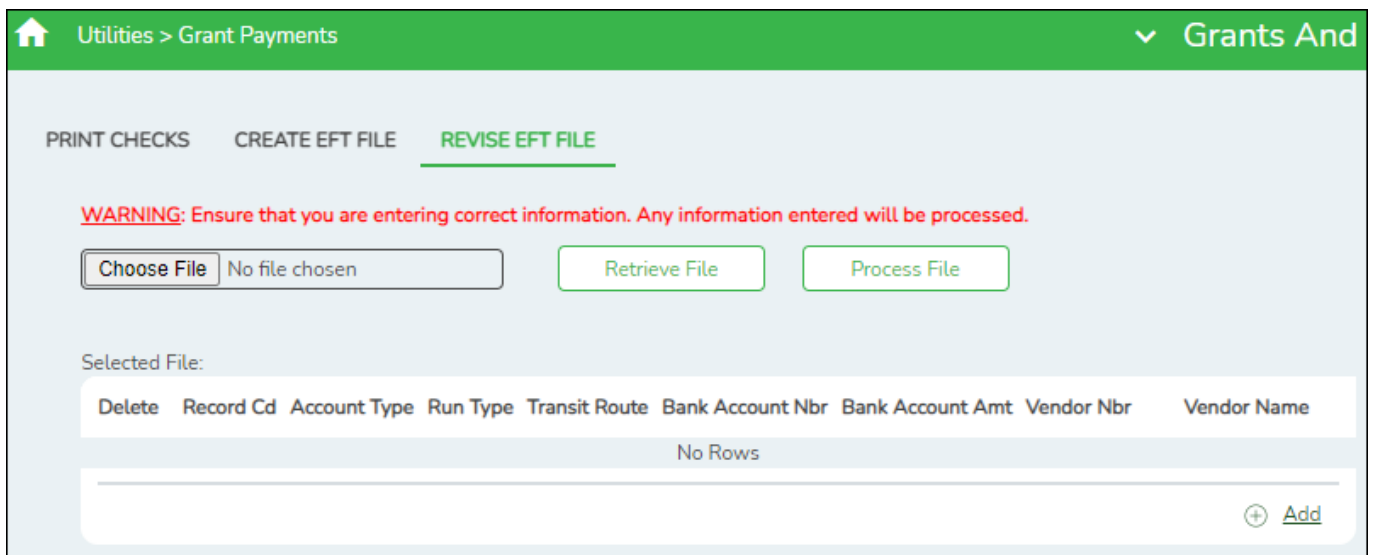
Added this tab to create an EFT file to send to the bank for electronic funds transfer of grant

reimbursement payments.



Grants and Projects > Utilities > Grant Payments > Revise EFT File

Added this tab to edit an existing EFT file prior to sending the file to the bank for electronic funds transfer of grant reimbursement payments.



Grants and Projects > Reports > SSA Grant Reports > GP1000 - Grant Summary Status Report

Added this report to provide a summary of grant status information.

Reports > SSA Grant Reports > Grant Summary Status Report

Grants And Projects

Preview PDF CSV Clear Options

Grants And Projects GP1000-Grant Summary Status Report

GP1000 - Grant Summary Status Report

Parameter Description	Value
Sort By Grant (T) or Member (M) or Grant Year (Y)	<input type="text"/>
Select Status for Grant Year & Grant ID Active (A), Closed (C), Cancelled (X) or Blank for ALL	<input type="text"/>
Select Grant Year (YYYY) or Blank for ALL	<input type="text"/>
Select Grant Type(s) or Blank for ALL	<input type="text"/>
Select Member(s) or Blank for ALL	<input type="text"/>

Phase 2: Travel Reimbursement Requests

Phase 2: Travel Reimbursement Requests

Finance > Tables > District Finance Options > Accounting Periods

Added the **Travel Accounting Period** field to accommodate the travel functionality. This accounting period is incremented after completing the EOM and Fiscal Year Close processes.

Tables > District Finance Options

Finance

Save File ID: C Account Period: 04

FINANCE OPTIONS ACCOUNTING PERIODS CLEARING FUND MAINTENANCE

Retrieve Print

Current (Open) Accounting Period:

Next Accounting Posting Period:

Purchasing Accounting Period:

Accounts Receivable Period:

Travel Accounting Period:

Lock Current Accounting Period:

Warehouse ID	Description	Accounting Period
1	Supplies	<input type="text" value="04"/>

Bank Reconciliation > Tables > Bank Account Fund Groups > Bank Account Group

- Renamed the **Extract HR** column to **Extract Payroll**.
-

Finance > Maintenance > Pending Payables

- Modified the **Invoice Nbr** field to increase the number of characters allowed from 10 to 15.
-

Finance > Maintenance > EFT Processing

- Modified the program to improve the amount of time it takes to load/retrieve data.
-

Payroll > Payroll Processing > Run Payroll

- Modified payroll calculations to calculate 403B FICA Alternative accruals.
-

Payroll > Payroll Processing > Special Adjustments

- Modified the program to allow employee and employer 403B FICA Alternative Annuity amounts to be interfaced. Also, added the applicable columns to the necessary reports.
-

Payroll > Payroll Processing > Special Adjustments > Expense Only

- Renamed the **Recalc Grants** button to **Recalc Grts/403B**. Also, added the **Emplr 403B FICA Contrib** field to the list of expenses. This field cannot be modified and is calculated based on the expense pay entered if the original 403B FICA contribution was not zero.
-

Payroll > Payroll Processing > Special Adjustments > Accruals Only

- Added the **Accru Emplr 403B FICA Contr** field to the list of expenses.
-

Payroll > Utilities > Zero School YTD Accruals

Modified the program to allow employer 403B FICA Alternative Annuity amounts to be zeroed out and interfaced to Finance.

Payroll > Utilities > Payroll Accrual Variance Extract

Modified the program to calculate and interface employer accrual variance 403B FICA Alternative Annuity amounts.

Payroll > Reports > Year To Date Reports > HRS3650 - YTD Special Adjustment Report

Modified the program to include employer 403B FICA Alternative Annuity amount special adjustments.

Personnel > Utilities > Mass Update > Employee

Corrected the issue that caused employee years of experience to be incremented even though the re-employment date was greater than the date in the **Employment Date**< field.

Renamed the **Increment** section to **Update Experience**, and added the **Increment** and **Decrement** check boxes to allow the selected years of employee experience to either be increased or decreased by one.

Position Management > Utilities > Salary Simulation (Next Year)

Corrected the issue that prevented supplemental transactions from being included in the stat min calculations when the **Acct Type** is set to *S Supplemental Pay* and **Exp 373** is selected.

Modified PMIS salary simulations and reports to include 403B FICA Alternative contribution calculations.

Update 5.0.0216

ASCENDER

Release Date: 6/16/2021 **ASCENDER Update:** 5.0.0216

Accounts Receivable > Utilities > Purge Prior Year Invoices

Corrected the issue that prevented this process from being successfully completed.

Finance

Corrected the issue that prevented the following processes from being successfully completed:

- Budget Amendment > Delete Amendments > Amendment Number
 - Utilities > Fiscal Year Close
 - Utilities > Mass Purchase Order Reversal
 - Utilities > Clear Move NYR Requisitions To CYR
-

Position Management > Utilities > Salary Simulation

Corrected the issue that prevented TRS373 calculations from being calculated for TRS Position Code 05. Also, corrected the issue that caused TRS373 to be calculated for employees without a stat min salary.

Purchasing

Corrected the issue that prevented the following processes from being successfully completed:

- Next Year > Maintenance > Reverse Purchase Order
 - Utilities > Mass Delete Requisition Records
 - Utilities > Mass Reverse Pending Requisition Records
 - Utilities > Mass Purchase Order Reversal
-

Warehouse

Corrected the issue that prevented the following processes from being successfully completed:

- Utilities > Mass Delete Requisition Records
- Utilities > Mass Reverse Pending Requisition Records
- Utilities > Mass Purchase Order Reversal

[Update 5.0.0215](#)

ASCENDER

Release Date: 6/8/2021 **ASCENDER Update:** 5.0.0215

Accounts Receivable, Finance, Purchasing, Warehouse

Corrected the workflow issue that caused requisitions to remain in a Pending status even after being successfully approved by the final approver. Also, corrected the functionality of the **Return** button to update the requisition status to Returned regardless of the approver.

[Update 5.0.0214](#)

ASCENDER

Release Date: 6/4/2021 **ASCENDER Update:** 5.0.0214

[Business Known Issues](#)

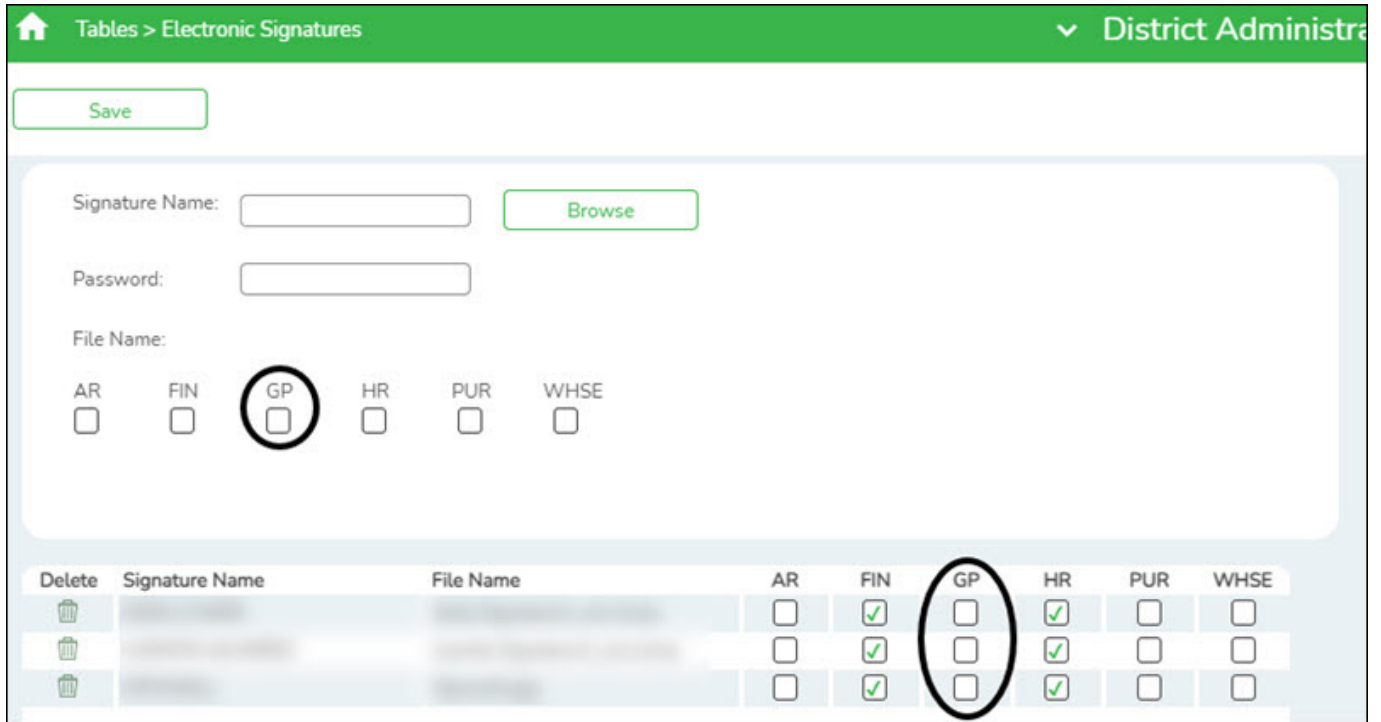
[NEW: SSA Fiscal Agent Management](#)

NEW: SSA Fiscal Agent Management

The new Shared Service Arrangement (SSA) Fiscal Agent Management feature provides fiscal agents a more efficient way to handle grant budget revision requests and reimbursement requests from SSA members. ESCs and LEAs can both serve as a fiscal agent.

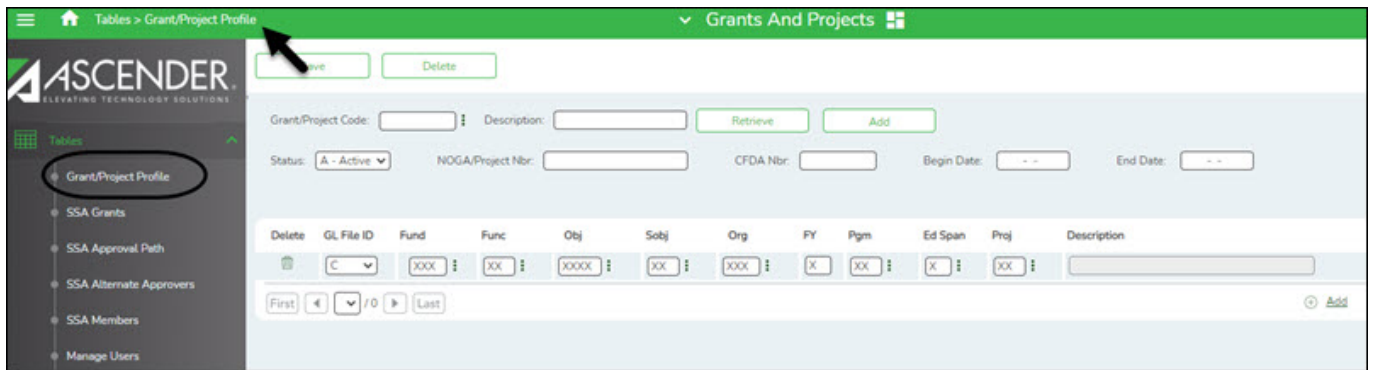
District Administration > Tables > Electronic Signatures

- Added **GP** to the application list allowing the upload of electronic signatures to be used in the Grants and Projects application.



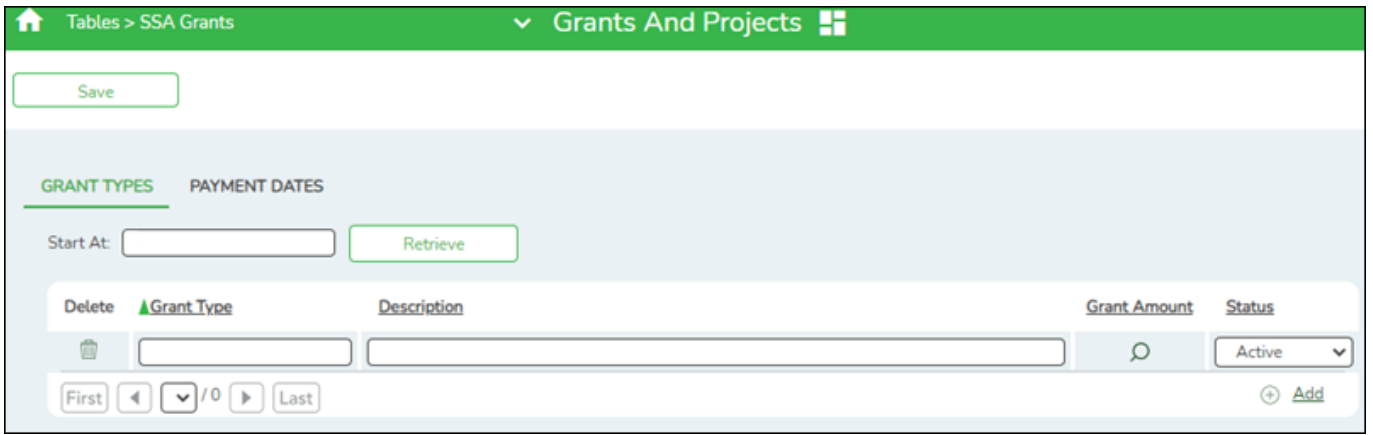
Grants and Projects > Tables > Grants and Projects Table

- Renamed this menu item from Grants and Projects Tables to Grant/Project Profile.



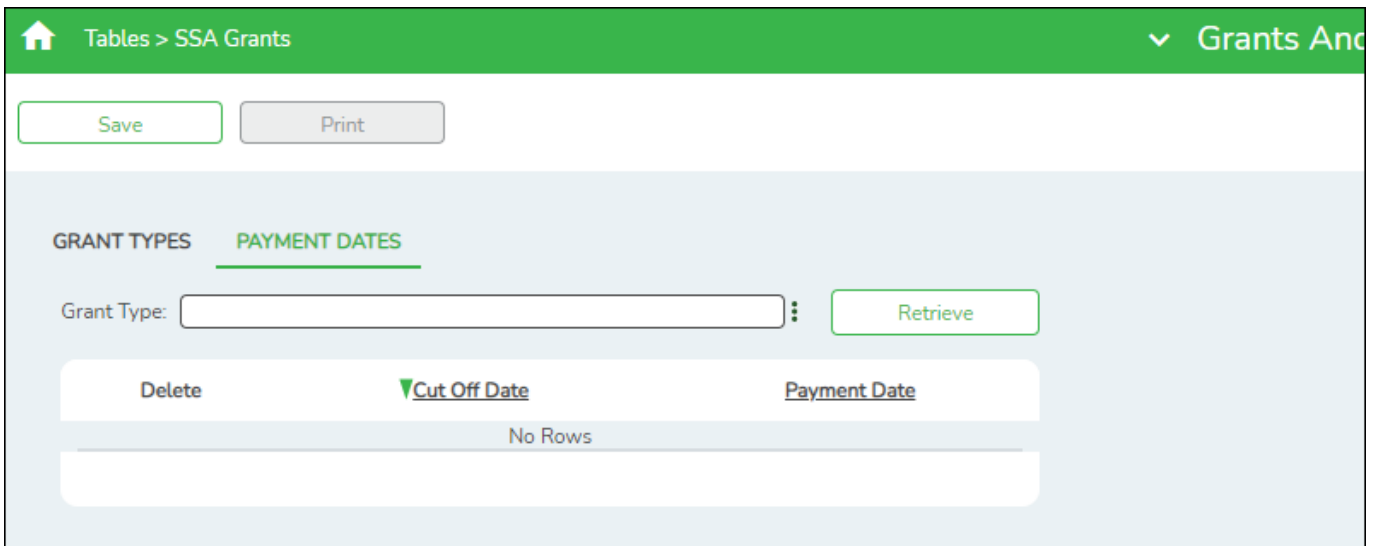
Grants and Projects > Tables > SSA Grants > Grant Types

- Added this tab to allow fiscal agents to maintain a list of grant types and descriptions, which can be used to facilitate the appropriate workflows and member notifications for each grant type.



Grants and Projects > Tables > SSA Grants > Payment Dates

Added this tab to allow fiscal agents to maintain a list of cut-off dates and expected payment dates for each grant type per member.



Grants and Projects > Tables > SSA Approval Path

Added this page to create and maintain the sequence or hierarchy of approvers for member grant budget revision requests and reimbursement requests.

Tables > SSA Approval Path Grants And Projects

Save

Grant Type: Retrieve

Reminder Days:

****Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. ****

WARNING
 Changing the approval path will update all pending requests for the selected Workflow Grant Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

Grant Type:

Approver	Email Opt-Out
No Rows	

**** DRAG-AND-DROP ****
 Press and hold down the left mouse button on the desired row to "Grab" it. "Drag" the row to the desired location. "Drop" the row by releasing the mouse button.

Grants and Projects > Tables > SSA Alternate Approvers

Added this page to assign alternate approvers to approvers who are unable to perform their assigned approval duties during a specified timeframe for member grant budget revision requests and reimbursement requests.

Tables > SSA Alternate Approvers Grants And

Save

Grant Type: Retrieve

Grant Type:

Clear	Approver Emp Nbr	Approver Name	Use Alternate	Alternate Emp Nbr	Alternate Approver Name	From Date	To Date
No Rows							

Grants and Projects > Tables > SSA Members > Member Information

Added this tab to allow fiscal agents to maintain member data records.

The screenshot shows a web application interface for 'Tables > SSA Members' under the 'Grants And Projects' section. At the top left is a 'Save' button. Below it is a 'Member:' input field followed by 'Retrieve', 'Directory', and 'Add' buttons. The main content area has two tabs: 'MEMBER INFORMATION' (selected) and 'BANK CODE'. Under 'MEMBER INFORMATION', there are two sections: 'Member Information' and 'Main Contact'. 'Member Information' includes fields for 'County District Nbr', 'Region' (dropdown), 'Status' (dropdown with 'Active' selected), 'Member Name', and 'Vendor'. 'Main Contact' includes fields for 'Contact Name' (with 'Title', 'First', and 'Last' sub-labels) and 'E-mail'.

Grants and Projects > Tables > SSA Members > Bank Code

□ Added this tab to allow fiscal agents to maintain bank information for members receiving payments via electronic funds transfer. In addition, the fiscal agent can use the Security Administration application to limit the users who can access this information.

The screenshot shows the same web application interface but with the 'BANK CODE' tab selected. The 'MEMBER INFORMATION' tab is now greyed out. Under 'BANK CODE', there is a 'Bank Information' section with an 'EFT E-mail' field. Below this is a table with columns: 'Delete', 'Bank', 'Bank Acct Nbr', 'Bank Acct Type', and 'PreNote'. The 'Bank' column contains a trash icon and a dropdown menu. The 'Bank Acct Nbr' and 'Bank Acct Type' columns have input fields, and the 'PreNote' column has a checkbox.

Grants and Projects > Tables > Manage Users

□ Added this page to manage MemberPortal user accounts. Member users can create an account via the MemberPortal; however, they will not have access to any grant information until the fiscal agent completes their user profile on this page.

Tables > Manage Users Grants And Projects

Save Add User

Users:

First Name: Last Name: Retrieve Clear

Member: Admin: Include Inactive:

Results:

Delete	Detail	▲First Name	Last Name	Member	Status
--------	--------	-------------	-----------	--------	--------

First < [dropdown] / 0 > Last

Grants and Projects > Maintenance > Member Grants > Grant Maintenance

Added this tab to allow fiscal agents to view and maintain various details related to a specified grant year, ID, type, or member (county district) record.

Maintenance > Member Grants Grants And

Year: Grant ID:

GRANT MAINTENANCE **OBJECT MAINTENANCE**

Year: Grant ID:

Member: Status:

Grant Type:

Expense Account:

Dates
Begin Date: -- --
End Date: -- --

Reserve
Reserved Percent:
Reserved Amount:

Final Report
Due Date: -- --
Processed Indicator:

Summary
Total Award: 0.00 Reimbursements: 0.00 Pending Reimbursements: 0.00
Eligible Remaining: 0.00 Matching Funds: 0.00

Transactions

Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Payment Date
No Rows							

Grants and Projects > Maintenance > Member Grants > Object Maintenance

Added this tab to allow fiscal agents to add budget details allocated by object class for a specified year and grant ID.

Maintenance > Member Grants Grants A

Save Add

Year: Grant ID: Retrieve Directory Documents

GRANT MAINTENANCE OBJECT MAINTENANCE

Year: Grant ID: Member:

Object	Total Award	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds	Over Expend %
61XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
62XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
63XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
64XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
65XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
66XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
Total:	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>

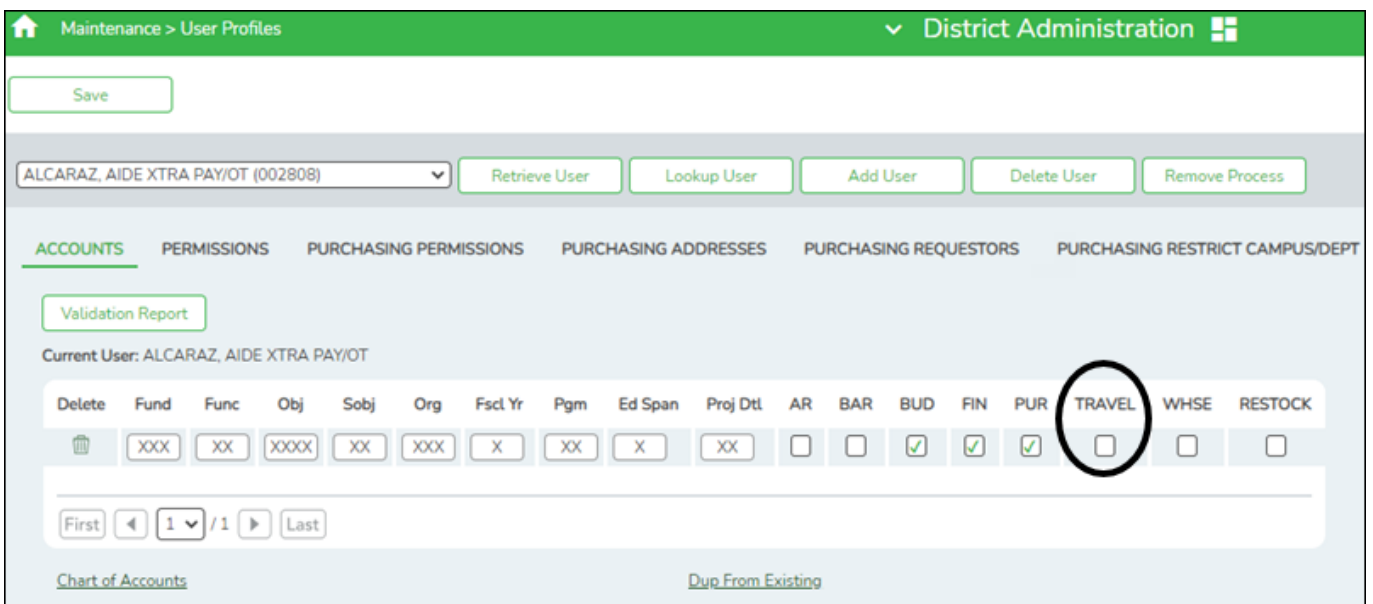
[NEW: Travel Reimbursement Requests](#)

NEW: Travel Reimbursement Requests

The new Travel Reimbursement Requests feature allows employees to request reimbursement of mileage, lodging, meals, and incidentals stemming from official business travel. This feature offers a summary/detailed view of travel reimbursement requests and allows for a customized approval path to ensure timely reimbursement payments.

District Administration > Maintenance > User Profiles > Accounts

Added the **TRAVEL** check box to the list of processes. If **Travel** is selected, the **Travel Request** application is displayed under APPS on the User Accounts Validation Report next to the associated account code(s).

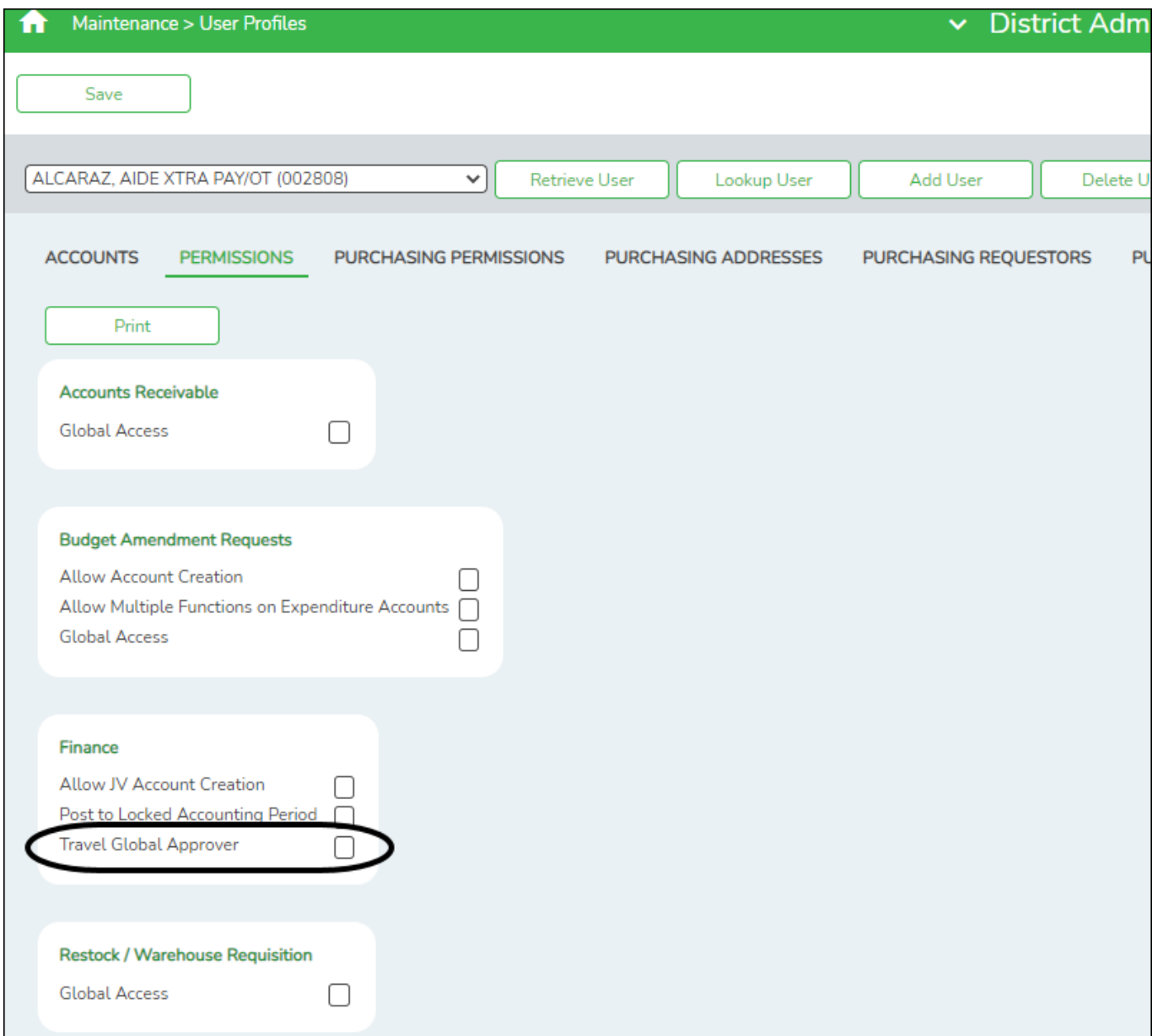


Removed the **Account Description** column.

Removed the **Refresh Description** link as it is no longer applicable.

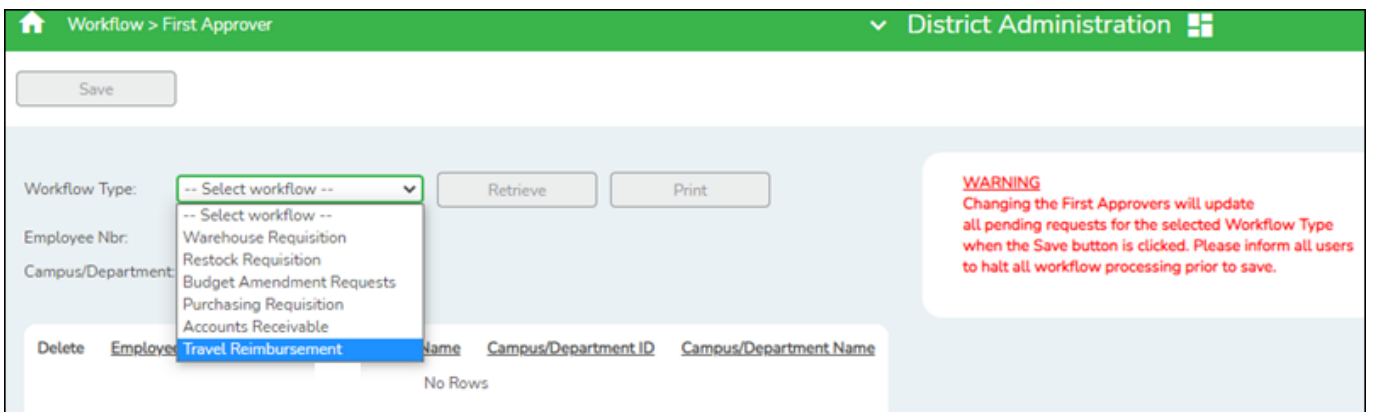
District Administration > Maintenance > User Profiles > Permissions

Added the **Travel Global Approver** check box to the Finance section allowing users to view all travel reimbursement records.



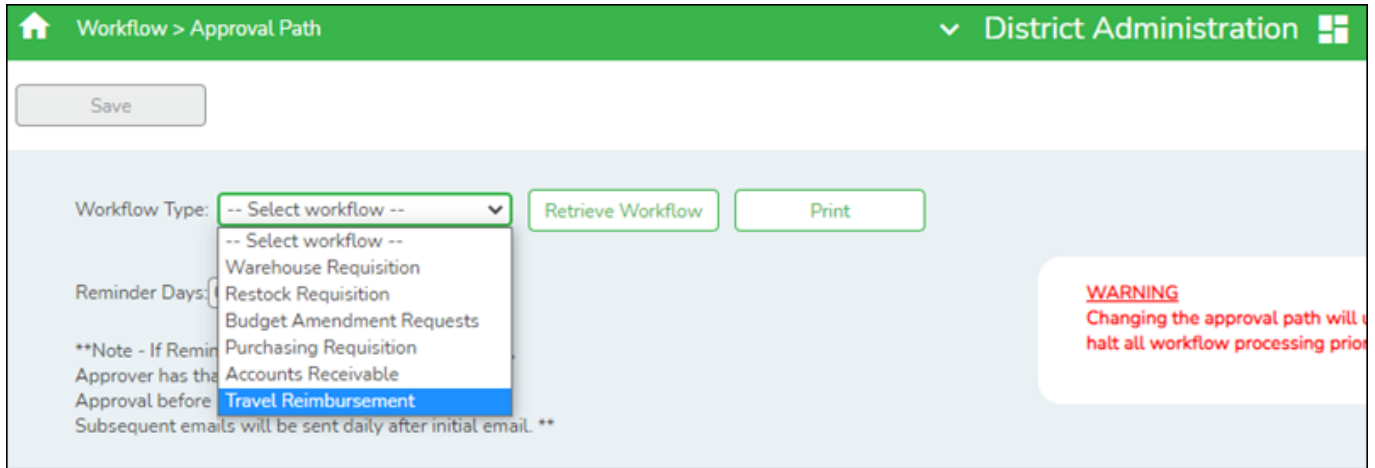
District Administration > Workflow > First Approver

Added the *Travel Reimbursement* option to the **Workflow** drop down allowing first approvers to be added for employee travel reimbursement requests at each campus/department.



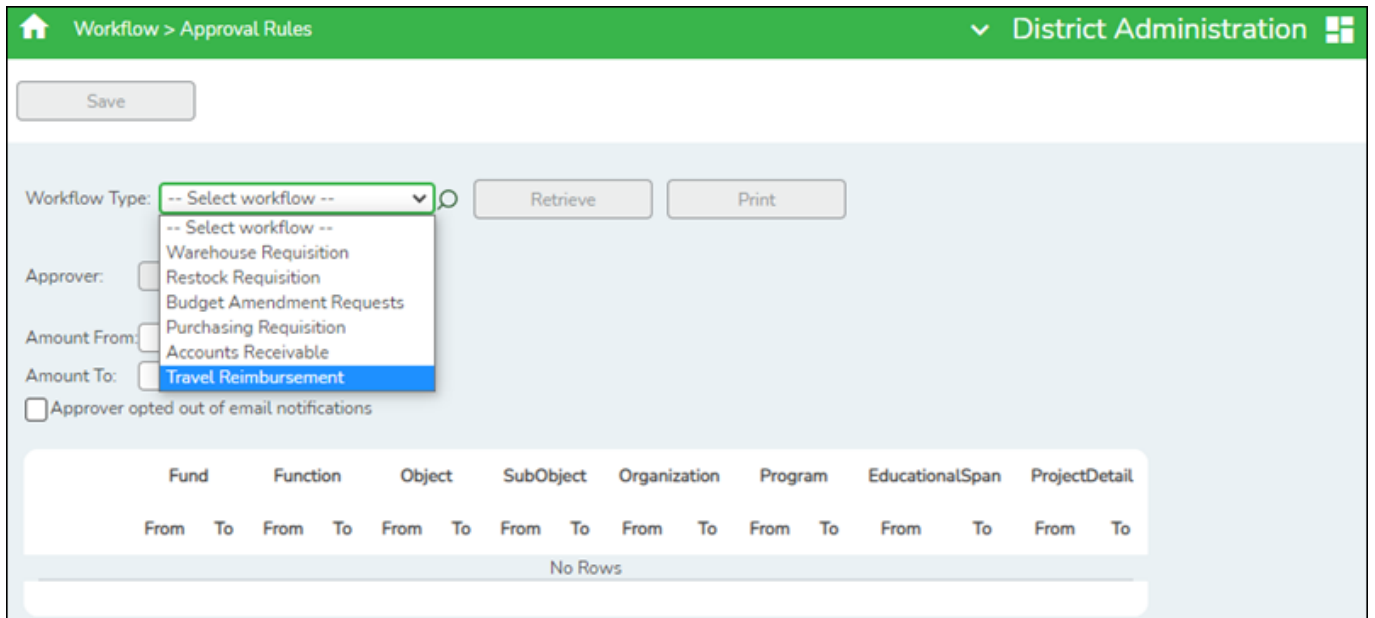
District Administration > Workflow > Approval Path

☐ Added the *Travel Reimbursement* option to the **Workflow** drop down allowing an approval path (i.e., a sequence or hierarchy of approvers) to be set for employee travel reimbursement requests.



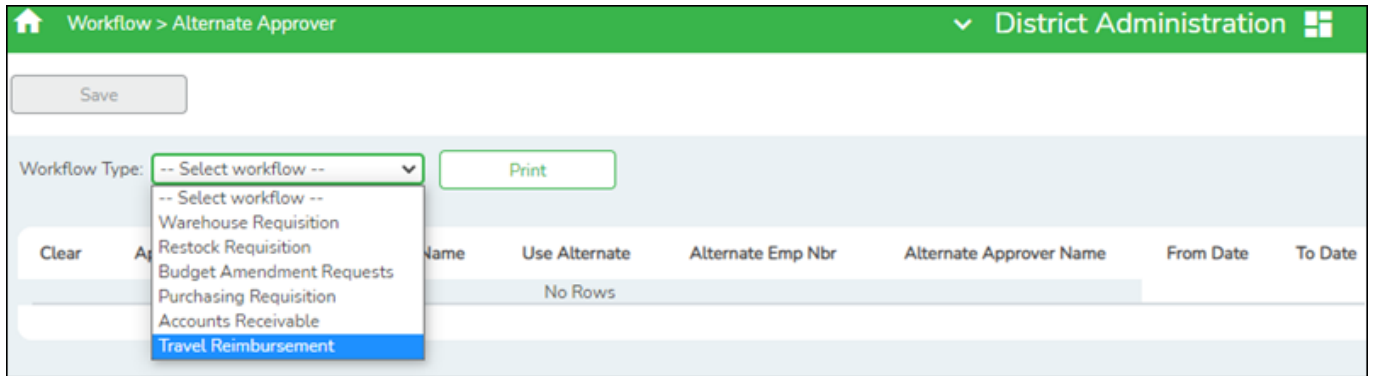
District Administration > Workflow > Approval Rules

☐ Added the *Travel Reimbursement* option to the **Workflow** drop down allowing account code rules to be set for each approver in the approval path except the first approver.



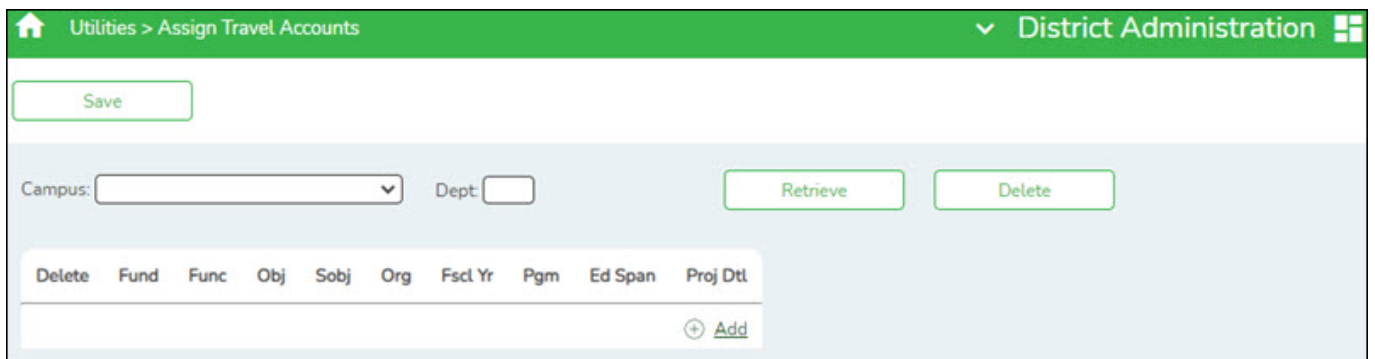
District Administration > Workflow > Alternate Approvers

Added the *Travel Reimbursement* option to the **Workflow** drop down allowing alternate approvers to be assigned to other approvers who are unable to perform their assigned approval duties during a specified timeframe for employee travel reimbursement requests.



District Administration > Utilities > Assign Travel Accounts

Added this page to mass assign account codes by campus ID and department code (optional) for travel reimbursement requests.



District Administration > Reports > User Profile Report

Modified the report to include the new **Finance Travel Global Approver** check box.

Date Run: User Profile Program: DA00001
 Cnty Dist: ISD Page 1 of 1

AIDE XTRA PAY/OT ALCARAZ

Global Access	Over-Ride	Over-Expend/Pct	Req Max	YTD Amt	YTD Max	Bundle Requisitions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0%	0.00	0.00	0.00	<input type="checkbox"/>

No Requestors Data Found No Purchasing Restrict Camp/Dept Found
 No Receiving Addresses Data Found
 No Purchasing Credit Cards Data Found

Accts Recv
 Global Access

BAR Allow Account Creation	BAR Allow Multiple Functions on Expenditure Accounts	BAR Global Access
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finance Allow JV Account Creation	Finance Post to locked Accounting	Finance Travel Global Approver
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Restock/Warehouse Requisition
 Global Access

User Profile Accounts
 BUD - XXX-XX-XXXX-XX-XX-XXXXXX
 FIN - XXX-XX-XXXX-XX-XX-XXXXXX
 PUR - XXX-XX-XXXX-XX-XX-XXXXXX

End of Report

Finance > Tables > District Finance Options 2

Added this page to define the appropriate parameters to be used for travel reimbursement requests.

Tables > District Finance Options 2 Finance

Save

Next Available Travel Request Number: Retrieve

Location Locking:

Require Start/End Times:

Require Odometer Start/Stop Mileage:

Mileage Reimbursement Rate:

New Mileage Reimbursement Rate:

New Mileage Reimbursement Date:

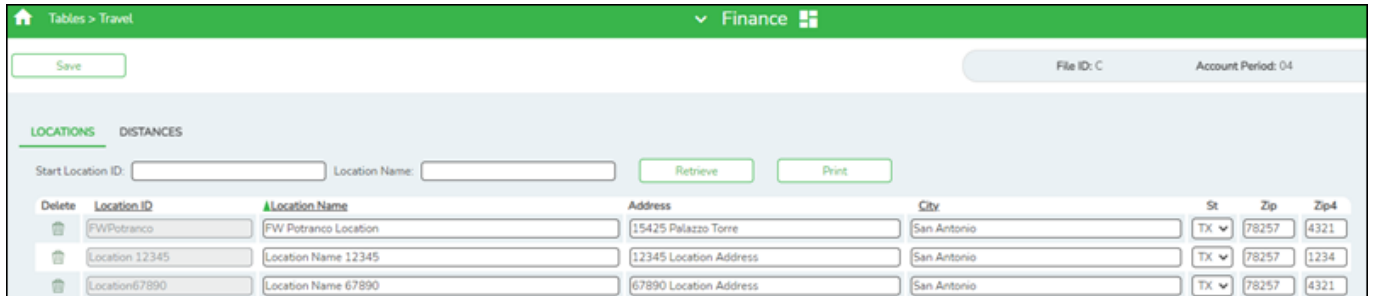
Breakfast Amount: Breakfast Eligible Depart Time:

Lunch Amount:

Dinner Amount: Dinner Eligible Return Time:

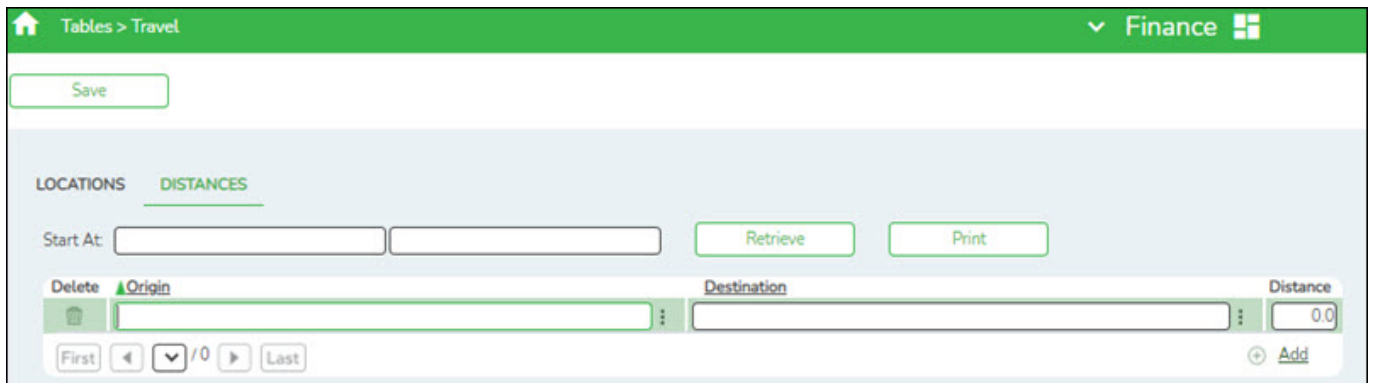
Finance > Tables > Travel > Locations

☐ Added this tab to maintain a list of predefined travel location details to be used for travel reimbursement requests.



Finance > Tables > Travel > Distances

☐ Added this tab to maintain a list of distances (in miles) between predefined to/from travel locations to be used for travel reimbursement requests.



Finance > Maintenance > Vendor Information > Vendor Miscellaneous

☐ Added the **Copy from Payroll** button to copy the employee's bank information from the Payroll > Maintenance > Staff Job/Pay Data > Pay Info record.

Maintenance > Vendor Information Finance

Save

Vendor: 39698 : Billy Brown / Billy Brown Retrieve Add Delete Directory Documents

VENDOR NAME / ADDRESS VENDOR MISCELLANEOUS

Bank Information

Delete	Bank	Bank Acct Nbr	Bank Acct Type	PreNote
<input type="checkbox"/>	071 - THE BANCORP BANK	10781082592.9999	2 Checking account	<input type="checkbox"/>

↓ Copy from Payroll

Category Information HUB Information

Delete	Category Code	Category Description	Bid Category	Begin Date	End Date	Delete	HUB Code	HUB Description
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		

Personnel > Maintenance > Staff Demo > Demographic Information

Added the **Travel Commute Distance** field to indicate the number of miles between the employee's home and assigned work location.

Maintenance > Staff Demo Personnel

Save

Employee: 003034 : Retrieve Directory Add Em

Addresses

	Number	Street/P.O. Box	Apt	City	State
Mailing:	16730	CR 4513		Alamo City	TX TEXAS
Alternate:					

	Address	Country	Delivery Name
Supplemental:			

Travel Commute Distance:

Sex: Citizenship: Driver's License: DL State:

DOB: Marital Stat: Deceased: DL Expir Date:

Homepage

Corrected the ascendertx.com link that displays when users do not have access to an application. Previously, clicking the link resulted in an error.

Session Timer

Corrected the Payroll, Personnel, and Position Management applications to use the session timer values from the District Administration > Options > Session Timers page. Previously, the session timer for these applications was automatically set to 60 minutes.

Accounts Receivable > Reports > BAR4000 - Invoice Listing by Revenue Code

Modified the program to include credit memo amounts in the **Adjustments** and **Balance** amounts.

Bank Reconciliation > Utilities > Mass Delete Transactions

Corrected the program to only include items from the selected bank account group. Previously, if **Outstanding Only** was selected, all outstanding items from all bank account groups were included.

Finance > Maintenance > Postings > Journal Budget & Journal Actual

Corrected the server error that occurred when trying to delete a journal voucher of a substantial amount.

Finance > Maintenance > Postings > Purchase Order

Corrected the issue that prevented vendor numbers from being changed on purchase orders that were created in Finance.

Finance > Utilities > Fiscal Year Close

Corrected the issue that prevented this process from being successfully executed.

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

Corrected the program error that occurred when trying to retrieve an employee without an existing job/payroll record (i.e., no data on the Staff Job/Pay Info tabs).

Payroll > Maintenance > Leave Account Transaction > Employee Substitute

Modified the program to prevent an employee/substitute transmittal from being created for a leave type not on the employee's leave record.

Payroll > Maintenance > Hours/Pay Transmittals > Addl Ded & Ded Refund

Modified the program to exclude A3 (403B FICA Annuity) deduction codes from the deduction code drop-down lists.

Payroll > Maintenance > School YTD Data

Added **Emplr 403B FICA Contr** under **Accrued Data** to display the total employer contribution amount for the 403B FICA Annuity deduction. Also, added this information to the detail window under **Accrued Data by Job**.

Payroll > Payroll Processing > Run Payroll

Modified payroll calculations to calculate 403B FICA Alternative employee and employer amounts.

Payroll > Payroll Processing > Interface Processing > Create General Journal

Modified the program to include 403B FICA Alternative Annuity employee and employer amounts in

the general journal.

Payroll > Payroll Processing > TRS Processing > Maintenance

Corrected the issue that caused the actual hours to be doubled on the RP20 extract for hours that were added to pay type 3 XTRA extra duty transmittals.

Payroll > Payroll Processing > TRS Processing > Interface

Added validation to prevent invalid posting dates from being processed.

Payroll > Payroll Processing > Payroll Adjustments > Check Void

Modified the program to include new 403B FICA Contribution columns in the void process.

Payroll > Payroll Processing > Payroll Adjustments > Check Issue

Modified the program to include 403B FICA Contribution calculations.

Payroll > Reports > Payroll Reports > HRS2000 - Payroll Control Listing

Added the **Annuity Rates** section, which includes the **Emp 457, Emplr 457, Emp 403B FICA,** and **Emplr 403B FICA** columns.

Payroll > Reports > Payroll Reports > HRS2050 - Proof List of Payroll Transactions

Renamed the **Apply 457** column to **FICA Alt**.

Payroll > Reports > Payroll Reports > HRS2300 - Account Distribution Journal

-
- Removed the **Include 457 Deferred Comp Data? (Y/N)** report parameter. Now, this information is automatically included.
 - Added the **Employer Contrib** column.
-

Payroll > Reports > Year to Date Reports > HRS3050 - School Year To Date Report

- Added the **403B FICA** column to the regular school YTD and job accrual details.
-

Personnel > Reports > Payroll Information Reports > HRS5250 - 1095-B Forms & HRS5255 - 1095-C Forms

- Corrected the manifest files for prior year ACA files per IRS specifications.
-

Payroll > Reports > User Created Reports

- Modified the program to display the **Certification, Responsibility,** and **Employment** sections from Personnel if the user has access to these pages in Security Administration.
-

Personnel > Utilities > Mass Update > Employee

- Added the **Prior Teaching Experience, If Employment Date <**, and **Job Codes** fields to the **Increment** section allowing the number of years of prior teaching experience to be mass incremented based on the employment date and job code parameters.

Personnel > Utilities > Mass Delete

- Corrected various display and sort issues to improve user experience.

Personnel > Utilities > Mass Delete > Permit Data

- Removed the **Mass Delete Mode Selection** section, which included the **Permits**, **Responsibilities**, and **Employee** options.
- Removed the **Pay Type** column.
- Removed the pay frequency from the report header.

Personnel > Utilities > Mass Delete > Responsibility Data

- Corrected the issue that caused a program error to occur when trying to delete responsibility records.
- Removed the pay frequency from the report header.

Personnel > Utilities > Mass Delete > Employee Data

- Added the **CYR Frequency** and **NYR Frequency** check boxes to select applicable pay frequencies.
-

Personnel > Reports > User Created Reports

- Corrected the issue that caused an error to occur when trying to retrieve a Personnel report template with saved Payroll selections. Now, the applicable Personnel data is retrieved along with a message indicating that the Payroll selections will not be included in the report. In addition, the saved Payroll selections are permanently deleted from the saved template.
-

Position Management > Reports > User Created Reports

- Corrected the report to include the **Employee Demo** fields when selected.
-

Purchasing > Maintenance > Create/Modify Requisition

- Corrected the **Commodity Code** field validation to display the appropriate error message when the user enters a code that does not exist on the District Administration > Tables > Commodity Codes page. Previously, a program error occurred.
-

Purchasing > Inquiry > General Ledger Inquiry

- Modified the program to improve the amount of time it takes to display the general ledger inquiry section.
-

Warehouse > Maintenance > Inventory Maintenance

- Modified the **Item Number** field to allow alphanumeric characters.
-

Warehouse > Maintenance > Create/Modify Warehouse Requisitions

Corrected the functionality of the **Uniform Acct Distr** button. Previously, clicking the button resulted in a blank page being displayed.

Warehouse > Maintenance > Create/Modify Inventory Restock Requisitions

Corrected the functionality of the **Uniform Acct Distr** button. Previously, clicking the button resulted in a blank page being displayed.

Warehouse > Maintenance > Approve Warehouse Requisitions

Corrected the functionality of the **Path** button. Previously, clicking the button resulted in a blank page being displayed.

Corrected the functionality of the **Uniform Acct Distr** button. Previously, clicking the button resulted in a blank page being displayed.

Warehouse > Maintenance > Approve Inventory Restock Requisitions

Corrected the functionality of the **Path** button. Previously, clicking the button resulted in a blank page being displayed.

Corrected the functionality of the **Uniform Acct Distr** button. Previously, clicking the button resulted in a blank page being displayed.

Warehouse > Reports > Warehouse Reports > BWH1150 - Print Shipping Order

Disabled the PDF and CSV buttons for this report.



EmployeePortal

Release Date: 6/4/2021 **ASCENDER Update:** 5.0.0214

EmployeePortal > Leave Requests

Corrected the spelling of EmployeePortal in the leave approval email notification.

[Update 5.0.0207](#)

ASCENDER

Release Date: 5/26/2021 **ASCENDER Update:** 5.0.0211

Document Attachments

Corrected various issues in an attempt to prevent an occasional Ajax error from occurring when trying to access Document Attachments.

[Update 5.0.0207](#)

ASCENDER

Release Date: 5/11/2021 **ASCENDER Update:** 5.0.0207

ASCENDER Homepage > Dashboard > Approval Summary

Corrected the program to display Finance budget amendment approvals from file ID C along with any approvals in the previous file ID associated with file ID C.

Corrected the program to display Warehouse approvals.

[Update 5.0.0206](#)

ASCENDER

Release Date: 4/19/2021 **ASCENDER Update:** 5.0.0206

Finance > Maintenance > Postings > Check Processing - PA & Check Processing - PO

Corrected the **Document** (Document Attachments) link to properly function when the **Invoice Nbr** contains spaces or allowed special characters.

Finance > Maintenance > Credit Card > Posting - PA & Posting - PO

Added a scroll bar to the Credit Card Transactions table to prevent credit card transactions from overlapping into the Account Code Summary table when adding multiple transaction lines (+10).

Finance > Budget Amendment

Corrected the **Documents** (Document Attachments) button to properly display and function when the budget **Amendment Nbr** contains spaces or allowed special characters.

[Update 5.0.0204](#)

ASCENDER

Release Date: 4/7/2021 **ASCENDER Update:** 5.0.0204

Document Attachments

Corrected the program to remove the case-sensitive validation from the document file extension. Previously, this issue prevented some documents from being successfully uploaded.

Corrected the program to allow documents with multiple periods in the document name (e.g., doc.3.5.pdf) to be successfully uploaded.

[Update 5.0.0202](#)

ASCENDER

Release Date: 3/30/2021 **ASCENDER Update:** 5.0.0203

Personnel > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C

Corrected the issue that prevented the ACA 1095-C correction file from being processed.

TxEIS

Release Date: 3/30/2021 **TxEIS Update:** 3.5.0234

Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C

Corrected the issue that prevented the ACA 1095-C correction file from being processed.

[Update 5.0.0202_3.5.0233](#)

ASCENDER

Release Date: 3/23/2021 **ASCENDER Update:** 5.0.0202

Payroll > Payroll Processing > Payroll Adjustments > Check Void

Corrected the issue that prevented a check from being voided after the original payroll run inadvertently caused multiple checks to be generated for an employee.

Personnel > Maintenance > Staff Demo > Responsibility

Modified the program to display the **Grade Level** field on this tab as well as the User Created Reports page. Previously, the field was not displayed.

TxEIS

Release Date: 3/23/2021 **TxEIS Update:** 3.5.0233

Human Resources > Payroll Processing > Payroll Adjustments > Check Void

Corrected the issue that prevented a check from being voided after the original payroll run inadvertently caused multiple checks to be generated for an employee.

[Update 3.5.0231](#)

Release Date: 3/1/21 **TxEIS Update:** 3.5.0231

Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

Added the **Prior Teaching** field to the **Years Experience** section to indicate the total years of prior teaching experience for the employee.

Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing

Added the **Yrs Prior Teaching** column to the **Experience** section.

Human Resources > Reports > User Created Reports > HR Report

Added the **Yrs Prior Teaching** check box to the **Employment** section.

**CareerPortal**

Release Date: 3/1/21 **TxEIS Update:** 3.5.0231 **ParentPortal Update:** 5.0.0200

Login

Updated the application login page with new background images and creation/maintenance

wizards.



EmployeePortal

Release Date: 3/1/21 **TxEIS Update:** 3.5.0231 **EmployeePortal Update:** 5.0.0200

Login

Updated the application login page with new background images and creation/maintenance wizards.

EmployeePortal > Create Account

Modified the program to display a more informative error message when users try to create a new account with a duplicated user name. Now, the error message informs users that the selected user name is already in use at the LEA and they must select a different, unique user name.

EmployeePortal > Inquiry > 1095 Information

Corrected the issue that prevented the employee from printing the 2020 1095-C form. Previously, an "Oops" message was displayed.

EmployeePortal > Self-Service

Corrected the program to only highlight the updated fields. Previously, all fields available for edit were highlighted. Also, corrected the email message to only list the updated fields.

[Update 3.5.0227](#)

Release Date: 01/20/2021 **TxEIS/ASCENDER Update:** 3.5.0227 **EmployeePortal Update:** 4.0.1.19

EmployeePortal > Inquiry > W-2 Information

Corrected the issue that caused the Statutory Employee box to be selected when printing the W-2 even though it did not apply to the employee.

[Update 3.5.0226](#)

Release Date: 01/15/2021 **TxEIS/ASCENDER Update:** 3.5.0226

Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - 1099 Forms

Corrected the alignment on Form 1099-MISC Copy A to properly print the legal fees in Box 10.

Corrected the alignment on Form 1099-NEC Copy A to properly print the income and withholding tax amounts in the appropriate boxes. Also, added the withholding taxes to the submission file.

Human Resources > Tables > ACA 1095 Codes > 1095-B Coverage Type

Updated the tab to support the 2020 tax year.

Human Resources > Tables > ACA 1095 Codes > 1095-C Offer of Coverage

Updated the tab to support the 2020 tax year.

Human Resources > Tables > ACA 1095 Codes > 1095-C Safe Harbor

Updated the tab to support the 2020 tax year.

Human Resources > Utilities > ACA 1094/1095 Correction/Replacement

Per IRS requirements, updated the utility to support the 2020 tax year.

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 - 1095-B

Per IRS requirements, updated the 1095-B form/instructions and all 1095-B functionality to support the 2020 tax year.

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5255 - 1095-C

Per IRS requirements, updated the 1095-C form/instructions and all 1095-C functionality to support the 2020 tax year including adding the **Employees Age** and **Zip Code** fields to the form.

EmployeePortal

Release Date: 01/15/2021 **TxEIS/ASCENDER:** 3.5.0226 **EmployeePortal Update:** 4.0.1

EmployeePortal > Inquiry > Calendar Year to Date

Corrected various Marital Status issues for active employees who exist in multiple pay frequencies.

EmployeePortal > Inquiry > W-2 Information

Corrected the 2020 W-2 form instructions to include the Families First Coronavirus Response Act (FFCRA) information.

EmployeePortal > Inquiry > 1095 Information

Per IRS requirements, updated the 1095-B/1095-C form/instructions and all 1095 functionality to support the 2020 tax year.

EmployeePortal > Inquiry > 1095 Information

Corrected various 1095 Consent window issues.

Update 3.5.0219

Release Date: 12/04/2020 **TxEIS/ASCENDER Update:** 3.5.0219

Accounts Receivable > Maintenance > Invoice Payments > Payments

Corrected the issue that prevented a payment from being posted to an invoice with an applied credit memo.

Finance > Inquiry > General Ledger Inquiry > General Ledger Inquiry Finance > Inquiry > GL Inquiry > GL Inquiry

Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

Inquiry > General Ledger Inquiry SessionTimer: 239 min and 55 sec

General Ledger Inquiry | General Ledger Account Summary | Employee Distribution List Inquiry | Over Expended Account Summary

Processed Current Period: 04 Next Period: 05 Include soft encumbrances when POs exist Exclude Objects 61XX **Include Inactive Accounts**

Show Details: Report will display Transaction Details

Description: Reason Vendor Name

Account Code: Fund Func Obj Sobj Org Prog
 XXX XX XXXX XX XXX X XX X XX

Retrieve Reset

Inquiry > GL Inquiry SessionTimer: 239 min and 16 sec

GL Inquiry | GL History - Accounting Period | GL History - EOM

Retrieval Options

Processed Current Period: 04 Next Period: 05 Include soft Encumbrances when POs exist Exclude Objects 61XX Exclude Accounts with No Transactions **Include Inactive Accounts**

Exclusions: Exclude Objects 61XX Exclude Accounts with No Transactions

Description: Reason Vendor Name

Account Code: Fund Func Obj Sobj Org Prog
 XXX XX XXXX XX XXX X XX X XX

Retrieve Reset

Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2050 - 1099 Report

(Mandated Change) Added the **For Tax Year > 2019, Print 1099-MISC (M), 1099-NEC (N), or blank for ALL** parameter to report the following for tax years greater than 2019:

- Report all 1099-MISC (M) transactions in the 1099 work file except those tied to an object code

with a **Type Payment** of *N - Non-employee compensation*.

- Report all 1099-Nonemployee Compensation (N) transactions in the 1099 work file that are tied to an object code with a **Type Payment** of *N - Non-employee compensation*.
- Leave blank to report all transactions in the 1099 work file.

Reports > Finance Reports > Vendor/Purchase Order Reports > 1099 Report SessionTime

[Return to Reports](#)

Report ID: **FIN2050**
 File ID:
 User ID:
 Curr Per:
 Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N)	<input type="text"/>
Print Account Nbr (A), Reason (R)	<input type="text"/>
Include EIN/SSN on Report? (Y/N)	<input type="text"/>
For Tax Year > 2019, Print 1099-MISC (M), 1099-NEC (N), or blank for ALL	<input type="text"/>
From Date (MMDDYYYY), or blank for ALL	<input type="text"/>
To Date (MMDDYYYY), or blank for ALL	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> ...

Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - Printing 1099-MISC Form

- (Mandated Change)** Renamed this report from Printing 1099-MISC Form to 1099 Forms.
- (Mandated Change)** Added the **For Tax Year > 2019, Print 1099-MISC (M) or 1099-NEC (N)** parameter to print the 1099-MISC or 1099-NEC forms for tax years greater than 2019.

Reports > Finance Reports > Vendor/Purchase Order Reports > 1099 Forms SessionTimer: 239 min and 56 sec

[Return to Reports](#)

Report ID: **FIN2100**
 File ID:
 User ID:
 Curr Per:
 Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N), Zip Code (Z)	<input type="text"/>
Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)	<input type="text"/>
Tax Year (####)	<input type="text"/>
For Tax Year > 2019, Print 1099-MISC (M) or 1099-NEC (N)	<input type="text"/>
Control Name (4 char, only required for 1099 file)	<input type="text"/>
Contact Name (40 char, only required for 1099 file)	<input type="text"/>
Control Code (5 char for 1099 file)	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> <input type="button" value="..."/>

(Mandated Change) Per IRS requirements, updated the 1099 form/instructions and all 1099 functionality to support the 2020 tax year.

Human Resources > Tables > Tax/Deductions > Income Tax

Modified the **But less than** field to allow seven characters and to be automatically populated with 9,999,999 to accommodate the tax rates being changed to annual amounts.

Human Resources > Maintenance > Calendar YTD Data > Calendar YTD

(Mandated Change) Added the **FFCRA** (Families First Coronavirus Response Act) **Payments** section allowing users to view and modify year-to-date FFCRA payment amounts for the 2020 calendar year. This section includes the following:

- **EPSLA Regular** (Emergency Paid Sick Leave Act regular rate)
- **EPSLA Two-Thirds** (Emergency Paid Sick Leave Act two-thirds rate)
- **EFMLEA** (Emergency Family and Medical Leave Expansion Act)

You can either manually update the fields on the Calendar YTD page or use the new **Update Cal YTD** button on Human Resources > Utilities > FFCRA Payments page to update the fields.

NOTE: If any of these amounts are greater than zero, the field and amount are displayed in Box 14 on the employee's W-2.

Maintenance > Calendar YTD Data SessionTimer: 239 min and 53 sec

Save

Calendar Year: Employee: Retrieve

Calendar YTD **Third Party Sick Pay** W2 Inquiry

Calendar YTD Data

Contract Pay:	4,238.83	Withholding Tax:	13.00
Non-Contract Pay:	1.00	Medicare Gross:	4,238.83
Supplemental Pay:	2.00	Emp Medicare Tax:	61.46
TRS Supplemental:	3.00	FICA Gross:	14.00
Tax Emplr Ins Contr:	4.00	Emp FICA Tax:	15.00
Non-TRS Bus Allow:	5.00	457 Emplr Contr:	16.00
Non-TRS Reimbr Excess:	6.00	Emp Business Expense:	17.00
N-TRS N-Pay Bus Allow:	7.00	Earned Income Credit:	0.00
Tax Emplr Grp Ins Contr:	8.00	TRS Deposit:	353.94
457 Withdraw:	0.00	Non-TRS Reimbr Base:	18.00
Annuities:	9.00	Non-TRS Non-Tax Bus Allow:	19.00
Cafeteria 125:	10.00	N-TRS N-Tax N-Pay Allow:	20.00
TRS Salary Red:	326.39	Health Ins:	21.00
457 Emp Contr:	11.00	Unemployment Tax:	22.00
Emplr Depend Care Taxable:	12.00	Unemployment Gross:	4,238.83
Taxable Gross:	3,930.44	Taxed Fringe Benefits:	6.60
Refresh Taxable Gross		Dependent Care:	24.00

Unemployment Data

	Gross	Tax
First Quarter:	4,238.83	
Second Quarter:	0.00	
Third Quarter:	0.00	
Fourth Quarter:	0.00	

Please select the pay date to be used for t

Preview

FFCRA Payments

EPSLA Regular:	40,000.00
EPSLA Two-Thirds:	40,000.01
EFMLEA:	40,000.02

Human Resources > Utilities > FFCRA Payments

(Mandated Change) Added the **Update Cal YTD** button to recalculate the FFCRA Payment amounts for processed pay dates where the leave transmittals still exist.

This utility can be used to update the FFCRA Payment amounts on the Human Resources > Maintenance > Calendar YTD Data > Calendar YTD for W-2 processing. Additional information can be found in Help.

Utilities > FFCRA Payments SessionTimer: 239 min and 55 sec

This utility will create Extra Duty Transmittals based on the criteria entered here in accordance with the Families First Coronavirus Response Act. Please review Help for detailed information.

Pay Date:

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

(**Mandated Change**) Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2020 tax year.

Purchasing > Inquiry > General Ledger Inquiry > General Ledger Inquiry

Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

The screenshot shows the 'General Ledger Inquiry' interface. At the top, it says 'Inquiry > General Ledger Inquiry' and 'SessionTimer: 239 min and 56 sec'. Below this, there are two tabs: 'General Ledger Inquiry' (selected) and 'General Ledger Account Summary'. The interface includes several checkboxes: 'Processed', 'Current Period: 04', 'Next Period: 05', 'Include soft encumbrances when POs exist', 'Exclude Objects 61XX', and 'Include Inactive Accounts' (highlighted with a red circle). There is also a 'Show Details' checkbox with the text 'Report will display Transaction Details'. A 'Description' dropdown menu is set to 'Vendor Name'. Below this, there are fields for 'Fund', 'Func', 'Obj', 'Sobj', 'Org', and 'Prog' with corresponding account codes. At the bottom, there are 'Retrieve' and 'Reset' buttons.

Warehouse > Inquiry > General Ledger Inquiry

Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

The screenshot shows the 'General Ledger Inquiry' interface. At the top, it says 'Inquiry > General Ledger Inquiry' and 'SessionTimer: 239 min and 56 sec'. Below this, there are two tabs: 'General Ledger Inquiry' (selected) and 'General Ledger Account Summary'. The interface includes several checkboxes: 'Processed', 'Current Period: 04', 'Next Period: 05', 'Include soft Encumbrances when POs exist', 'Exclude Objects 61XX', and 'Include Inactive Accounts' (highlighted with a red circle). There is also a 'Show Details' checkbox with the text 'Report will display Transaction Details'. A 'Description' dropdown menu is set to 'Vendor Name'. Below this, there are fields for 'Fund', 'Func', 'Obj', 'Sobj', 'Org', and 'Prog' with corresponding account codes. At the bottom, there are 'Retrieve' and 'Reset' buttons.



EmployeePortal

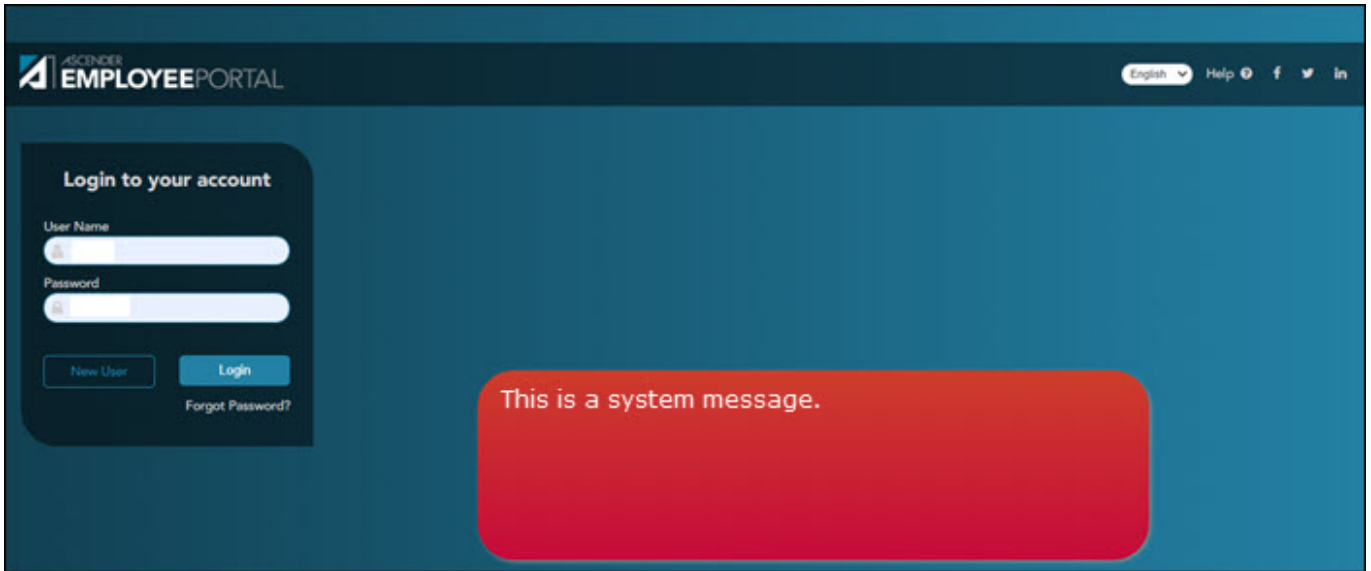
Release Date: 12/04/2020 **TxEIS/ASCENDER:** 3.5.0219 **EmployeePortal Update:** 4.0.1

EmployeePortal

Corrected the program to properly display the **Help** button in the lower right corner of each page in the application.

EmployeePortal > Login

Added a system message section to the page.



EmployeePortal > Change Password

Corrected the issue that prevented employees from changing their password if **Self-Service Demographic** was not selected in TxEIS.

EmployeePortal > Self-Service Profile

Corrected the program to properly handle changes submitted by the employee when the **Alternate Address** option is set to *N* on the Human Resources > Tables > EA Self-Service Assignments > Demographic page. Previously, an "Oops" message was displayed.

Corrected the issue that allowed the **Filing Status** field to be left blank even though it was marked as a required field on the Human Resources > Tables > EA Self-Service Assignments > Payroll page.

EmployeePortal > Inquiry

Added the following W-4 Withholding fields to the Calendar Year to Date, Current Pay Information, Deductions, and Earnings pages:

- **Filing Status**
 - **Multi-Jobs**
 - **Children under 17**
 - **Other Dependents**
 - **Other Exemptions**
 - **Other Income**
 - **Other Deductions**
-

EmployeePortal > Inquiry > Calendar Year to Date

Corrected the program to display all active pay frequencies. Previously, if an employee was paid from multiple pay frequencies, only data from one of the pay frequencies was displayed.

EmployeePortal > Inquiry > Earnings

Corrected the PDF to include complete bank, leave, and address information.

Corrected the program to display the correct **Total Earnings** amount. Previously, if an employee had a Non-TRS Non-pay Taxable amount, that amount was doubled in the **Total Earnings** amount.

Modified the User Interface colors and shading to meet ASCENDER style standards.

Corrected the program to display the correct leave type and units used.

EmployeePortal > Inquiry > W-2 Information

(**Mandated Change**) Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2020 tax year.

(**Mandated Change**) Added the following fields for the 2020 calendar year:

- **EPSL1** (Emergency Paid Sick Leave Act (EPSLA) regular rate)
 - **EPSL2** (Emergency Paid Sick Leave Act (EPSLA) two-thirds rate)
 - **EFMLEA** (Emergency Family and Medical Leave Expansion Act)
-

NOTE: If any of these amounts are greater than zero, the field and amount are displayed in Box 14 on the employee's W-2.

W-2 Information

W-2 INFO MESSAGE

Please select a calendar year: 2020

Taxable Gross Pay	1,426.77	Withholding Tax	143.98	Pension	Y
FICA Gross	0.00	FICA Tax	0.00		
Medicare Gross	0.00	Medicare Tax	0.00		
Earned Income Credit	0.00	Dependent Care	0.00		
Annuity Deduction	0.00	457 Withdraw	0.00	457 Annuities - Box 12	0.00
Cafeteria 125	216.94	Roth 403B After Tax	0.00		
Non-TRS Business Expense	0.00	Taxable Allowance	0.00	Emp Business Expense	0.00
Moving Expense Reimbursement	0.00	Emplr Sponsored Health Coverage	357.00	Annuity Roth 457b	0.00
TRS Salary Reduction	137.12				
Taxed Life Contribution	0.00	Health Insurance Deduction	0.00	Taxable Fringe Benefits	0.00
Health Savings Account	0.00	Non-Tax Sick Pay	0.00	HIRE Exempt Wages	0.00
EP5L1	0.00	EP5L2	0.00	EFMLEA	0.00

Corrected the program to display the correct Medicare tax withholding values on the report when using the mouse right-click to print the page.

EmployeePortal > Leave Requests

Corrected the program to automatically populate the **End Date** field with the same date entered or selected in the **Start Date** field.

Corrected the program to allow employees to edit or delete a submitted leave request at any point prior to the transmittal being created in payroll.

EmployeePortal > Supervisor > Approve Leave Requests

Corrected the program to display the correct Absence Reason description as originally selected by the requestor.

[Update 3.5.0217](#)

Release Date: 11/17/20 **TxEIS/ASCENDER Update:** 3.5.0217

Human Resources > Maintenance > Staff Demo > Responsibility

Corrected the program to allow duplicate responsibility records with different **Grade Levels** to be saved.

[Update 3.5.0206](#)

Release Date: 10/2/2020 **TxEIS/ASCENDER Update:** 3.5.0206

Accounts Receivable > Maintenance > Credit Memo

Corrected the issue that caused the following error to occur when the Accounts Receivable, Current, and Next accounting periods in Finance were all the same: "Invalid accounting period for Accounts Receivable in Finance Options."

Finance > Maintenance > Postings > Journal Actual

Corrected the issue that caused revenue and expenditure accounts to be out-of-balance when a journal voucher was deleted from this tab.

Human Resources > Maintenance > Staff Demo > Responsibility

(Mandated Change) Added the **Grade Level** field. This field must be populated if the **Pop Served** field is set to *06* and the **Role ID** field is set to either *033*, *047*, or *087*. Otherwise, the field should be left blank.

Rows: 1 of 1

Campus:	001 001 School	# of Students:	015	PE Info:	
Role ID:	033 - Educational Aide	Class ID:	001a-ut-0-0000000	Days Wk 1:	0
Service ID:	01020000 - KINDER ELEM	Class Type:	01 Regular	Days Wk 2:	0
Pop Served:	06 Special Ed Students	Monthly Minutes:	09000	Days Wk 3:	0
Grade Level:	KG Kindergarten	ESC/SSA:	School District Employee	Days Wk 4:	0
		Job Code:		Min Wk 1:	0
				Min Wk 2:	0
				Min Wk 3:	0
				Min Wk 4:	0

[Refresh Service ID Setting](#)

Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

(Mandated Change) Added the **Paraprofessional Certification** check box allowing you to indicate whether a paraprofessional employee is certified.

Maintenance > Staff Job/Pay Data SessionTimer: 237 min and 18 sec

Save

Employee: 000113 : BROWN, BILLY E Retrieve Directory Documents

Employment Info Pay Info Job Info Distributions Deductions Leave Balance

Employee Status:	1 Active professional	Original Emp. Date:	08-20-1990	Primary Job Code:	0145 - SPP TEACHER
Highest Degree:	2 Master's	Latest Re-Employ Date:	08-20-1990	Primary EEOC:	
Percent Day Employed:	100%	Retirement Date:	00-00-0000	Percent Assigned:	100%
Eligible for Re-hire:	<input type="checkbox"/>	Take Retiree Surcharge:	<input type="checkbox"/>	Employment Type:	F Half-Time or more
Extract ID:	SEP 10 MONTH EMPLOYEES	NY Take Retiree Surcharge:	<input type="checkbox"/>	Retiree Employment Type:	
W-2 Elec Consent:	N No	Year Round:	<input type="checkbox"/>	PEIMS Auxiliary Role ID:	
1095 Elec Consent:		ERS Retiree Health Elig:	<input type="checkbox"/>	Highly Qualified:	<input type="checkbox"/>
		NY ERS Retiree Health Elig:	<input type="checkbox"/>	Paraprofessional Certification:	<input type="checkbox"/>

Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing

(Mandated Change) Added the **Paraprofessional Certification** check box to the **Personnel Information** section.

Date Run: 09-29-2020 11:12 AM
Employee Data Listing
ISD
Program: HRS1250
Page: 1 of 2
Frequency: 6

Emp Nbr: 000113 **Emp Name:** BROWN, BILLY E

Payroll Name & Primary Address		Former Name & Alternate Address		Primary Campus: 700 - 700 School	
Last: BROWN	Last: BROWN	Payroll Campus: 700 - 700 School	Info Restrict: N	Gender: M - Male	
First: BILLY	First: BILLIE	Restrict Public: A	Local Area 1: TEACHER	Marital Stat: M - Married	
Middle: E	Middle: EDITH	Local Area 2:	Drivers Lic#: 64632218	Birth Date: 07-13-1962	
Title: Gen:	Title: Mis Gen: II	DL Expir Date:	Deceased: N	Last Chg: 08-15-2019	
Street: BOX 2349	Street: 4242 S PHELPS	TR S Beg. Dt:	Citizen: Y		
City/St: Alamo City, TX	City/St: Alamo City, TX	Hispanio/Latino <input type="checkbox"/>	Black/African American <input type="checkbox"/>		
Zip Cd: 46119	Zip Cd: 46119	Asian <input type="checkbox"/>	American Indian/Alaskan Native <input type="checkbox"/>		
Country:	Relation: SPOUSE	White <input checked="" type="checkbox"/>	Native Hawaiian/Other Pacific Isl <input type="checkbox"/>		
Phone: (555) 675-8350 Cell: (555) 310-9141 Bus Ph: () Bus Ext:		Bilingual:			
Wk E-mail:	Hm E-mail:				
Supplemental Address:					
Country:					
Delivery Name:					
Emergency Contact: CHN Y					
Phone: (555) 310-9140 Ext:					
Emergency Notes:					

Personnel Information

Employee Status: 1 - Active professional	Original Emp. Date: 08-20-1990	Primary Job Code: 0145 - SPP TEACHER
Highest Degree: 2 - Master's	Latest Reemploy Date: 08-20-1990	Primary EEOC:
Percent Day Employed: 100%	Retirement Date:	Percent 100%
Eligible for Rehire: <input checked="" type="checkbox"/>	Take Retiree Surcharge: <input type="checkbox"/>	Paraprofessional Certification: <input type="checkbox"/>
Extract ID: SEP - 10 MONTH	NY Take Retiree Surcharge:	
W-2 Elec Consent: N	Year Round: <input type="checkbox"/>	Employment Type: F - Half-Time or more
1095 Elec Consent:	ERS Retiree Health Elig: <input type="checkbox"/>	Retiree Employment Type:
		NY ERS Retiree Health Plan: <input type="checkbox"/>

(Mandated Change) Added the **Grd Lvl** column to the **Staff Responsibilities** section.

Payroll Name & Primary Address		Former Name & Alternate Address		Primary Campus: 700 - 700 School	
Last: BROWN	Last: BROWN	Payroll Campus: 700 - 700 School	Info Restrict: N	Gender: M - Male	
First: BILLY	First: BILLIE	Restrict Public: A	Local Area 1: TEACHER	Marital Stat: M - Married	
Middle: E	Middle: EDITH	Local Area 2:	Drivers Lic#: 64632218	Birth Date: 07-13-1962	
Title: Gen:	Title: Mis Gen: II	DL Expir Date:	Deceased: N	Last Chg: 08-15-2019	
Street: BOX 2349	Street: 4242 S PHELPS	TR S Beg. Dt:	Citizen: Y		
City/St: Alamo City, TX	City/St: Alamo City, TX	Hispanio/Latino <input type="checkbox"/>	Black/African American <input type="checkbox"/>		
Zip Cd: 46119	Zip Cd: 46119	Asian <input type="checkbox"/>	American Indian/Alaskan Native <input type="checkbox"/>		
Country:	Relation: SPOUSE	White <input checked="" type="checkbox"/>	Native Hawaiian/Other Pacific Isl <input type="checkbox"/>		
Phone: (555) 675-8350 Cell: (555) 310-9141 Bus Ph: () Bus Ext:		Bilingual:			
Wk E-mail:	Hm E-mail:				
Supplemental Address:					
Country:					
Delivery Name:					
Emergency Contact: CHN Y					
Phone: (555) 310-9140 Ext:					
Emergency Notes:					

Staff Responsibilities

Campus	Role ID	Service ID	Service ID Descr	Pop Snd	Grd Lvl	Nbr Stu	Class ID	Class Type	Monthly Minutes	ESC / SSA	Job Code
					Days Wk 1						
001 - 001 School	PE Info:	114 SS003000	SCHL ADMIN - NONE	01		015	001aut00000000	01	09000		

End of Report

Human Resources > Reports > User Created Reports > HR Report

(Mandated Change) Added the **Grade Level** check box to the **Responsibility** section.

(Mandated Change) Added the **Paraprofessional Certification** check box to the **Employment** section.

The screenshot shows a form with several sections:

- Employee Demographic:** Includes fields for Employee Nbr, Staff ID/SSN, Maiden Name, Phone Area Cd, Last Change Date, Emer Contact, Hispanic/Latino, Texas Unique Staff ID, Address Number, Former Prefix, Phone Nbr, Citizenship, Relationship, American Indian, Name Prefix, Street/P.O. Box, Former First Name, Bus Phone Area, Marital Stat, Emer Notes, Asian, First Name, Apt, Former Middle Name, Bus Phone Nbr, Other Language, Emer Area Cd, African American, Middle Name, City, Former Last Name, Bus Ext, Local Use 1, Emer Phone Nbr, Pacific Islander, Last Name, State, Former Generation, Cell Area Cd, Local Use 2, Emer Ext, White, Generation, Driver's License, Cell Phone Nbr, Email, Sex, DL State, Local Restriction, Home Email, DOB, Zip+4, DL Expir Date, Public Restriction, Employee Notes, Addr Country.
- Certification:** Includes Cert Type, Specialty Area, Cert Date, Teaching Spec, Date Expire, Campus, Pop Served, Class ID, Job Code, Days Wk 3, Min Wk 2, Grade Level, Role ID, Nbr Of Students, Class Type, Days Wk 1, Days Wk 4, Min Wk 3, Service ID, Monthly Minutes, ESC/SSA, Days Wk 2, Min Wk 1, Min Wk 4.
- Employment:** Includes Employee Status Code, Yrs Non-Professional Experience, Original Emp Date, Take Retiree Surcharge, W-2 Elec Consent, Termination Reason, Highest Degree Achieved, Yrs Non-Professional in District, Latest Re-Employ Date, NY Take Retiree Surcharge, 1095 Elec Consent, Termination Reason Descr, Percent Day Employed, Contract Class, Retirement Date, Extract ID, ERS Retiree Health Elig, Full Semester, Est Annual Salary, Contract Term, Termination Date, Fingerprint Status, NY ERS Retiree Health Elig, PEIMS Auxiliary Role ID, Yrs Professional Experience, Contract Year, Extended Leave Begin, Fingerprint Extract Date, Employment Type, Highly Qualified, Yrs Professional in District, Grades Taught, Extended Leave End, Fingerprint Date, Retiree Employment Type, Paraprofessional Certification.

Update 3.5.0204

Release Date: 9/25/20 TxEIS/ASCENDER Update: 3.5.0204

Finance

Finance > Maintenance > Postings > Journal Budget

Finance > Maintenance > Postings > Journal Actual

Corrected the program to properly retrieve the continuing funds journal entry created by the Fiscal Year Close process on the Journal Budget tab instead of the Journal Actual tab.

Finance > Maintenance > Postings > Journal Actual

Modified the program to allow the deletion of TRS On-Behalf journal entries. Now, a trashcan icon is displayed for these entries.

Finance > Utilities > Fiscal Year Processing > Create New Accounts By Fund

Corrected the error that occurred during processing, which was caused by the system trying to re-create duplicate accounts.

-
- Corrected the issue that prevented the preview report from being generated.

[Update 3.5.0190 Finance](#)

Update 3.5.0190 Finance

Finance > Maintenance > Postings > Purchase Order

- Corrected the program to allow reversing a PO created in Finance. Previously, an error was displayed.

[Update 3.5.0190](#)

Update 3.5.0190

Finance

Finance > Maintenance > Postings > Purchase Order

- Corrected the issue that prevented purchase orders with balances from being retrieved.

Finance > Utilities > Fiscal Year Close

- Modified the program to only enable this menu item when logged on to file ID C.
- Corrected the purchase order re-encumbrance for continuing funds to include encumbrance adjustments and liquidation adjustments from check/credit card transactions.
- Corrected the program to not re-encumber outstanding purchase orders that are split between funds.
- Modified the program validation to ignore all payrolls that have not been interfaced where the payroll is in the same month as the LEA's **Starting Accounting Period** on the District Finance Options tab.

Finance > Utilities > Fiscal Year Processing > Create New Accounts By Fund

- Corrected the program to properly post the journal voucher entries. Now, the closing entries will post separately to the budget and actual fund balance object codes that are listed in the account code table.

[Update 3.5.0182](#)

Update 3.5.0182

Grants and Projects

Grants and Projects > Reports

Removed this menu option as it is not currently available. Previously, the menu displayed the Bank Reconciliation Reports, which resulted in a program error if selected.

Finance

Finance > Utilities > Fiscal Year Close

Corrected the program error that occurred when you accessed the page. This issue was caused when the total number of funds in the file ID was a multiple of 15. For example, 15, 30, 45, 60 caused an issue but 18 did not even though the first page had the maximum.

[Update 3.5.0181](#)

Update 3.5.0181

Grants and Projects

The Grants and Projects is a new application that allows you to view grant/project data for the entire grant period regardless of the fiscal year. The application includes the following pages:

Grants and Projects > Tables > Grants and Projects Table

Added this page to define grant codes that can be tracked in the Grants and Projects application.

Grants and Projects > Inquiry > GL Inquiry

Added this page to perform the general ledger inquiries for a specific grant/project code.

District Administration

District Administration > Maintenance > User Profiles > Grants and Projects

Added this tab to assign specific grant code(s) to users allowing them to view the grant code details in the Grants and Projects application.

Finance

Finance > Maintenance > Postings > Journal Budget & Journal Actual

Added the **Ignore for Grants and Projects** check box allowing you to indicate that all entries for the JV should be ignored for the Grants and Projects application. For example, a user can post a JV in a file ID and it will not be displayed in the Grants and Projects inquiry. This can be helpful with auditor's entries.

Finance > Maintenance > Fiscal Year Close

Corrected the issue that allowed a single fund with multiple years separated between pages to be incremented instead of being defaulted to only allow the fund to be continued. For example, if fund 616/8 was listed on one page and 616/9 was listed on the next page, the **Increment** option should not be available for 616/8.

Corrected the issue with possible out-of-balance issues stemming from running the closing process. Now, the Finance > Utilities > Out of Balance Correction utility is processed prior to processing any of the Fiscal Year Close functions.

Corrected the issue that prevented report headers from being displayed if there was nothing to report on the Fiscal Year Close pre-post Unprocessed Budget Amendment report; only a blank page was displayed.

Corrected the pre-post JV report to retrieve the Finance end-of-year stored procedure to accurately generate the opening entries.

Modified the program to identify the purchase order encumbrances created for rollover funds in order to prevent them from being displayed multiple times in the Grants and Projects inquiry.

[Update 3.5.0180](#)

Update 3.5.0180

Human Resources

Human Resources > Maintenance > Staff Demo

Corrected the Document Attachments issue that prevented the **Driver License** option from being displayed in the Document Upload Type drop-down list.

[Update 3.5.0178](#)

Update 3.5.0178

Finance

Finance > Maintenance > Postings > Check Processing-PA

Corrected the issue that prevented you from adding a new purchase authorization (PA) after one was already added and saved.

[Update 3.5.0177](#)

Update 3.5.0177

Known Issues

These issues are a high priority and will be corrected as quickly as possible.

Finance > Utilities > Fiscal Year Close

- The Fiscal Year Close process may cause an out-of-balance in file ID C. **Workaround:** Run the Finance > Utilities > Out of Balance Correction utility to correct it.
- The Fiscal Year Close pre-post JV report is incorrect.
- If there is nothing to report on the Fiscal Year Close pre-post Unprocessed Budget Amendment report, the report headers are not displayed.

Finance

Finance > Maintenance > Check Processing > Print Checks

Corrected the error that occurred when trying to post a vendor check.

Finance > Maintenance > Postings > Journal Budget & Journal Actual

Maintenance > Postings SessionTimer: 239 min and 49 sec

Save

Journal Budget | Journal Inquiry | Purchase Order | Cash Receipt | Credit Memo | Check Processing - PA | Check Processing - PO | Journal Actual

JV Number: 007344 | JV Number Description: TECH SUPPLIES Retrieve | Directory

JV Type: BUDGET | JV Number: 007344 | JV Number Description: TECH SUPPLIES | Acct Per: 04 | Capture Orig Budget: | Default JV Number Description:

Add JV | **Reset** | Reverse JV | **Delete** | Print

Delete	Detail	Reverse	Account Code	Description	Reason	Debit Amount	Credit Amount	Trans Date	User ID
		Reverse	199-11-6321.00-041-811000	TEXTBOOKS, M.S.	TECH SUPPLIES	50.00	0.00	04-04-2018	PAMELA
		Reverse	199-11-6399.01-041-811000	TECH SUPPLIES	TECH SUPPLIES	0.00	50.00	04-04-2018	PAMELA
Totals:						50.00	50.00		

- Added the **Print** button to print the journal voucher report.
- Added the trashcan icon to delete previously saved individual journal voucher transactions. These deletions will be included in the Audit Log Inquiry.
- Replaced the **Delete JV** button with the **Delete** button to delete journal vouchers.
- Added the **Reset** button to clear unsaved data from the page.

Finance > Maintenance > Postings > Check Processing - PA

Maintenance > Postings SessionTimer: 239 min and 52 sec

Save

Journal Budget | Journal Inquiry | Purchase Order | Cash Receipt | Credit Memo | Check Processing - PA | Check Processing - PO | Journal Actual

PA Number: 181881 | Vendor Number: 39689 Retrieve | Directory | View Account Details

PA Number: 181881 | Sort Key / Vendor Name: WELLS FARGO VISA / WELLS FARGO VISA | Vendor Number: 39689

Add PA | **Reset** | Reverse PA | **Delete**

Delete	Detail	Reverse	Proc	Acct Per	Account Code	Type	Check Nbr	Check Date	Reason	Net Expend Amt	Invoice Date	Invoice Nbr	Con
		Reverse	<input type="checkbox"/>	04	180-00-2110.00-000-800000	District	915111	06-05-2018	District	11.11	06-06-2018	060618	180-00-
		Reverse	<input type="checkbox"/>	04	180-00-2110.22-000-800000	Computer		--	PYMT WELLS FARGO VISA	1,448.00	--		180-00-
		Reverse	<input type="checkbox"/>	04	180-00-2110.22-000-800000	Computer		--	Test	12.12	06-09-2018	654654	180-00-
Totals:										1,471.23			

- Added the trashcan icon to delete previously saved individual purchase authorization transactions. These deletions will be included in the Audit Log Inquiry.
- Replaced the **Delete PA** button with the **Delete** button to delete purchase authorizations.
- Added the **Reset** button to clear unsaved data from the page.

Finance > Inquiry > Vendor Inquiry > Vendor Payment Inquiry

- Corrected the issue that prevented attached documents from being displayed.

Finance > Utilities > Move Current to New File ID

- Changed this utility to no longer function in the current file ID (file ID C).

Finance > Utilities > Fiscal Year Processing > Delete Funds

Changed this utility to no longer function in the current file ID (file ID C).

Finance > Utilities > Fiscal Year Close

Added this utility to provide an easy, streamlined method to efficiently end the old fiscal year and begin the new fiscal year. Review the Fiscal Year Close Help page for additional information.

Fund/Year	Increment	Continue	Continue & Increment	Delete	Carry Forward Balances	Create 5000-8000
180/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
180/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
197/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
199/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
199/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
199/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
206/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
206/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
209/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
209/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
210/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
211/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
211/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
211/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
212/	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

Removed the following utilities as they are included in the new Fiscal Year Close process and no longer necessary as stand-alone functions.

- Finance > Budget Amendment > Delete Amendments > Fund/Fiscal Year
- Finance > Utilities > Mass Change Account Codes > Fund/Year
- Finance > Utilities > Fiscal Year Processing > Fund Close (5XXX-8XXX)
- Finance > Utilities > Fiscal Year Processing > Fund Close (1XXX-4XXX)

Removed the export (backup) prompt from the following utilities:

- Finance > Maintenance > EFT Processing > Create EFT File
- Finance > Budget Amendment > Post to General Ledger
- Finance > Budget Amendment > Delete Amendments > Amendment Number
- Finance > Utilities > End of Month Closing
- Finance > Utilities > Fiscal Year Processing > Create New Accounts by Fund
- Finance > Utilities > Fiscal Year Processing > Mass Delete Credit Memos
- Finance > Utilities > Mass Purchase Order Reversal
- Finance > Utilities > Fiscal Year Processing > Move Budget To Finance
- Finance > Utilities > Fiscal Year Processing > Clear/Move NYR Requisitions to CYR
- Finance > Utilities > Mass Change Account Codes > Mask Crosswalk
- Finance > Utilities > Fiscal Year Processing > Mass Delete Vendors
- Finance > Utilities > Import JV Transactions

[Update 3.5.0176](#)

Update 3.5.0176

Human Resources

Human Resources > Utilities > FFCRA Payments

Added this utility to track and calculate Families First Coronavirus Response (FFCRA) payments by creating extra duty transmittals based on the entered criteria. Review the FFCRA Payments Help page for additional information.

Utilities > FFCRA Payments

This utility will create Extra Duty Transmittals based on the criteria entered here in accordance with the Families First Coronavirus Response Act. Please review Help for detailed information.

Pay Date:

Execute

	Pay Type 1	Pay Type 2	Pay Type 3	Pay Type 4
Leave Type for EPSLA regular rate:	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>
Leave Type for EPSLA two-thirds rate:	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>
Leave Type for EFMLEA:	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>
Account:	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>	<input style="width: 80%; height: 20px;" type="text"/>

Update 3.5.0174

Update 3.5.0174

Removed the **What's HOT in TxEIS** button from the Login Page as the newsletter is obsolete.

Accounts Receivable

Accounts Receivable > Maintenance > Credit Memo

Modified the program to correctly handle credit memos when the accounting period is the same as the next accounting period in Finance. Previously, when trying to apply a credit memo to an invoice, a credit memo error was displayed and an out-of-balance condition occurred in Finance. Now, the credit memo is correctly applied to the invoice and an overpayment is created if the credit memo caused a negative balance.

Accounts Receivable > Reports > Accounts Receivable Reports > BAR7500 - Reprint Invoices Report

Modified the program to allow prior year account codes to be printed even if they do not exist in the current year Finance chart of accounts.

Human Resources

Human Resources > Utilities > Mass Update > Salary Calculation

Corrected the issue that prevented the daily rate and accrual rate from being updated when performing salary calculations using the local annual concept.



CareerPortal

Update 4.0.0.31 (TxEIS 3.5.0174)

CareerPortal Login

- Added **Help** before the question mark icon.
 - Added Facebook, Twitter, and LinkedIn icons with links after the **Help** link.
-



EmployeePortal

Update 4.0.0.75 (TxEIS 3.5.0174)

EmployeePortal Login

- Changed the login statement from Please Login to Login to Your Account.
- Added Facebook, Twitter, and LinkedIn icons with links after the **Help** link.
- Removed the Contact Us link.

[Update 3.5.0172](#)

Update 3.5.0172

Finance

Finance > Maintenance > Check Processing > Void Check

Corrected the issue that prevented PO encumbrance transactions from being posted to the logged-on accounting period.

Finance > Inquiry > Vendor Inquiry > Vendor Payment Inquiry

Corrected the Document Attachments issue that caused a delay in retrieving data on the page.

[Update 3.5.0171](#)

Update 3.5.0171

Finance

Finance > Maintenance > Check Processing > Void Check

Corrected the issue that prevented deferred checks from being reposted with the original check transaction account codes.

Human Resources

Updated the state minimum salary calculations to allow TRS Position Codes 02 and 05 to be based on days greater than 187.

Corrected the state minimum salary calculation to use the **# of Days Empld** instead of the **Max Days**.

- Human Resources > Maintenance > Staff Job/Pay Data > Job Info
- Human Resources > Maintenance > PMIS Position Admin
- Human Resources > Maintenance > PMIS Position Modify
- Human Resources > Utilities > PMIS > Salary Simulation
- Human Resources > Utilities > PMIS > Move Forecast to CYR Position and Payroll
- Human Resources > Utilities > PMIS > Move Forecast to NYR Payroll

Human Resources > Maintenance > PMIS Change In Position > Change In Compensation

Corrected the contract and pay rate amount calculations for pay type 2 employees who are paid with the hourly/daily pay concept at an hourly rate.

Human Resources > Payroll Processing > Run Payroll

Corrected the issue that caused the federal income tax to be calculated even though the employee was marked as tax exempt and had zero original exemptions and no selections in the new W-4 fields.

Human Resources > Utilities > PMIS

Updated the following utilities to verify the job code salary concept and display any failures on the error report.

- Move Forecast to CYR Position and Payroll
- Move Forecast to CYR Position and Payroll
- Create Forecast Positions

Human Resources > Utilities > PMIS > Move Forecast to CYR Position and Payroll

Corrected the issue that caused an error when updating current year records.

Human Resources > Reports > TRS Reports > HRS7815 - TRS Non-OASDI Employer Contribution & HRS8905 - Regular Payroll (RP)

Corrected the issue that caused the TRS Non-OASDI amount to be doubled when performance pay was included.



EmployeePortal

Update 4.0.0.137 (TxEIS 3.5.0171)

EmployeePortal > Forgot Password

Corrected the issue that caused users to receive an error message. This issue only occurred if the LEA selected to use the Social Security Number on the Human Resources > Tables > District EA Options > Employee Access Options tab.

EmployeePortal > Inquiry > W-2 Information

Corrected the issue that prevented the **Print** button from being displayed.

Corrected the issue that prevented the third-party sick pay from being displayed. Also, corrected the third-party sick pay label.

EmployeePortal > Inquiry > 1095 Information

- Corrected the issue that prevented the **Print** button from being displayed.

EmployeePortal > Leave Balances

- Corrected the issue that caused this tab to be enabled for employees in EmployeePortal even though it was not enabled on the Human Resources > Tables > District EA Options > Employee Access Options tab.

EmployeePortal > Leave Requests

- Corrected the issue that prevented leave from being posted to a leave type with a zero balance even if the **Post Against Zero Balance** option was selected for the leave type.
- Modified the program to display all of the employee's active assigned leave types even if the leave type amount is zero.

[Update 3.5.0170](#)

Update 3.5.0170

Human Resources

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

- Corrected the issue that caused the employee's full name (first, middle, and last) to be printed in the Employee's First Name box on Copy A (red form) of the W-2 form.



EmployeePortal

Update 4.0.0.127 (TxEIS 3.5.0170)

EmployeePortal > Self-Service

- Corrected the W-4 data displayed under **W4 Marital Status Information**.

EmployeePortal > Inquiry > W-2 Information

-
- Corrected the issue that prevented the W-2 Electronic Consent selection from being saved if the employee did not have W-2 historical data.
 - Corrected the issue that prevented Box 12 Code E (annuity amount) from being displayed properly.

EmployeePortal > Inquiry > 1095 Information

- Corrected the issue that prevented the 1095 Electronic Consent selection from being saved if the employee did not have 1095 historical data.

EmployeePortal > Inquiry > Current Pay Information

- Corrected the issue that prevented the current pay information from being displayed if the employee had data in multiple pay frequencies.
- Corrected the issue that prevented the campus name from being displayed.

[Update 3.5.0169](#)

Update 3.5.0169

Human Resources

Human Resources > Maintenance > Staff Job/Pay Data > Pay Info

- Corrected the issue that caused a W-4 Marital Status code validation error to occur when trying to add W-4 information for a new employee.

Human Resources > Payroll Processing > Special Adjustments > Percent

- Corrected the issue that caused an error to occur when trying to process a Special Adjustment.



EmployeePortal

- Corrected the issue that prevented news users from being created in some databases.

EmployeePortal > Forgot Password

-
- Corrected the issue that prevented the Forgot Password functionality from reading the email server information for each database.

Update 3.5.0168

Update 3.5.0168

EmployeePortal

EmployeePortal > Self-Service

- Corrected the issue that prevented the employee from adding a new direct deposit account.

EmployeePortal > Inquiry > Earnings

- Corrected the wage and earnings reporting per pay date for Business only districts.
- Corrected the issue that prevented the employee from printing their current earnings if they were paid with a physical payroll check instead of an EFT.

Human Resources

Human Resources > Utilities > Payroll Accrual Variance Report > Post to Master/Interface to Finance

- Corrected the issue that caused a program error to occur when trying to run this utility.

Release 3.5

New ASCENDER Products

The TCC is excited to announce the launch of the new ASCENDER CareerPortal and EmployeePortal applications! Check out the ASCENDER Resources page for training guides and marketing materials.

CareerPortal

The CareerPortal application uses the new ASCENDER user interface (UI) and it is now included.

- New URL:** <https://yourdomain.com/CareerPortal/home?distid=CCDDDD>

Example: <https://ascendertx.com/CareerPortal/home?distid=009010>

Default login information:

- Username: madmin
- Password: D3faultPassword

EmployeePortal

The EmployeePortal application uses the new ASCENDER user interface (UI), offers a Spanish language translation, and has a new calendar view for Leave Requests.

New URL: <https://yourdomain.com/EmployeePortal/login?distid=CCDDDD>

Example: <https://ascendertx.com/EmployeePortal/login?distid=009010>

District Administration

District Administration > Tables > Electronic Signatures

Corrected the issue that caused an error to occur when trying to upload a signature on a new database.

Bank Reconciliation

Bank Reconciliation > Maintenance > Bank Transactions > Create Transactions

Corrected the program to extract the original and voided check transactions even if the original and voided check transactions have the same date.

Corrected the program to extract JV entries for credit card transactions.

Finance

Finance > Maintenance > Pending Payables

Renamed the **Submit** button to **Submit/Return**. The functionality is the same as the original **Submit** button. After completing the required fields and then clicking **Submit/Return**, the check transaction is created, the pending payable transaction is deleted and you are returned to the main page.

Added the **Submit/Stay** button. This functionality does not delete the pending payable transaction but instead adds a submit date to the record and you remain on the same page (PO details page). The Document Attachment functionality becomes available and the **Inv Documents** button is displayed allowing you to upload documents. The Document Attachments functionality is not available for bundled requisitions.

Maintenance > Pending Payables SessionTimer: 239 min and 19 sec

Buttons: **Submit/Return**, **Submit/Stay**, Cancel, Delete

Type & Number: PURCHASE ORDER 181979 Whse Cd: 0 Purchasing Received Date: 11-20-2019 Original Amount: 300.50
 Vendor: 95000 123 EZ TEES INC Received Amount: 49.75 Balance Amount: 0.00
 Received By: []

Maintenance > Pending Payables SessionTimer: 239 min and 58 sec

Buttons: Submit/Return, Submit/Stay, Cancel, Delete, **Inv Documents**

Transaction Successful

Type & Number: PURCHASE ORDER 181993 Whse Cd: 0 Purchasing Received Date: 09-13-2019 Original Amount: 375.00
 Vendor: 95000 123 EZ TEES INC Received Amount: 50.00 Balance Amount: 375.00
 Received By: []
 Originator: []

Added the read-only Document Attachments functionality for requisition documents if a purchase order has documents attached. The read-only Document Attachments functionality is not available for bundled requisitions.

Maintenance > Pending Payables SessionTimer: 239 min and 27 sec

Buttons: Submit/Return, Submit/Stay, Cancel, Delete, **Req Documents**

Type & Number: **PURCHASE ORDER 181963** Whse Cd: 0 Purchasing Received Date: 12-03-2019 Original Amount: 435.00
 Vendor: 39461 AMERICAN BOTTLING COMPANY Received Amount: 155.00 Balance Amount: 435.00
 46 BRAUNER PKWY, Alamo City, TX
 54887 Received By: []
 Originator: []

Modified the program to allow this page to handle bundled requisitions/purchase orders.

Corrected the issue that prevented posting in the Next accounting period.

Finance > Maintenance > Check Processing > Print Checks

Changed the Vendor Check Transaction Detail Report to sort by the invoice number and then account code when the invoice number is the same.

Finance > Utilities > Move Current to New File ID

Modified the program to prevent a fund from being moved or copied if a pending payable record is

tied to it.

Finance > Utilities > Mass Change Account Codes > Mask Crosswalk

Modified the program to include the pending payable distribution table when crosswalking from one account code to another.

Finance > Utilities > Fiscal Year Processing > Fund Close 5XXX-8XXX and Fund Close 1XXX-4XXX

Modified the program to prevent a fund from being deleted or closed if a pending payable record is tied to it.

Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1750 - Year to Date Check Payments List

Corrected the published report to sort data according to the sort option selected in the **Sort by Ck#/Acct (1), Acct/Ck# (2), Vendor#/Ck#/Acct (3), Vendor#/Acct/Ck# (4)** parameter.

Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - Printing 1099-MISC Form

Per IRS requirements, updated the 1099-MISC Forms to support the 2019 tax year.

Changed the **Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B (B) or Copy C (C)** parameter to **Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)**. Option 3 prints Copies B and C on one page for the same vendor and includes the instructions for both copies on the back of the page.

Reports > Finance Reports > Vendor/Purchase Order Reports > Printing 1099-MISC Form SessionTimer: 239 min and 52 sec

[Return to Reports](#)

Report ID: FIN2100
 File ID: C
 User ID:
 Curr Per:
 Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N), Zip Code (Z)	<input type="text"/>
Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)	<input type="text"/>
Tax Year (####)	<input type="text"/>
Control Name (4 char, only required for 1099 file)	<input type="text"/>
Contact Name (40 char, only required for 1099 file)	<input type="text"/>
Control Code (5 char for 1099 file)	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> ...

[Run Preview](#)
[Clear Options](#)

Human Resources

Per IRS requirements, added the new [W-4 fields](#) to the following pages/reports:

Be sure to review [Publication 15-T](#), which contains the withholding tax calculations.

- Human Resources > Tables > EA Self-Service Assignments > Payroll
- Human Resources > Next Year > Copy CYR Staff to NYR
- Human Resources > Next Year > Copy NYR Staff to CYR
- Human Resources > Self-Service > Payroll Approval
- Human Resources > Self-Service > Payroll Approval by Alternate
- Human Resources > Reports > HR Reports > Payroll Reports > HRS2500 - Wage and Earning Statement
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS1250 - Employee Data Listing
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS1650 - Employee Salary Information
- Human Resources > Reports > Payroll Reports > HRS2200 - Payroll Earnings Register
- Human Resources > Reports > YTD Reports > HRS3200 - YTD Payroll Earnings Register
- Human Resources > Reports > YTD Reports > HRS3500 - YTD Wage and Earnings Statement
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6150 - Employee Payroll Listing
- Human Resources > Reports > Self-Service Reports > HRS8000 - Self-Service Requests

Removed the withholding status and exemptions from payroll check forms:

- Human Resources > Payroll Processing > Run Payroll > Print Checks
- Human Resources > Inquiry > Payroll Inquiry

Per IRS requirements, updated the 1095-B/1095-C forms and all ACA functionality to support the 2019 tax year.

- Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-B
- Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C
- Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 - 1095-B Forms
- Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5255 - 1095-C Forms

Human Resources > Tables > District Options

Added the **W-2 Print Options** section allowing you to select the amounts to be printed on the employee W-2 form. The following options are available:

- **TRS**
- **HLTH**
- **CAF**
- **NTA**

- TXA
- TFB

Tables > District HR Options SessionTimer: 239 min and 42 sec

Save

HR Options

Retrieve **Print**

TRS District ID:	<input type="text" value="3885"/>	Calculate Accrual Salaries:	<input checked="" type="checkbox"/>
Federal ID Number (EIN):	51-9128683	Check Amount - Alpha:	<input checked="" type="checkbox"/>
Payroll Clearing Fund/Year:	<input type="text" value="863/8"/>	Summarize Benefits Interface:	<input type="checkbox"/>
TWC District ID:	<input type="text" value="699939322"/>	Supplemental Tax Rate:	<input type="text" value="25.00%"/>
Use Direct Deposit (Y,N, or C):	<input type="text" value="E - Electronic Funds Transfer"/>	Standard Hours per Workday:	<input type="text" value="8.0"/>
TRS Cost Education Index:	<input type="text" value="1.0800"/>	Max Gross Amt for District:	<input type="text" value="25,000.00"/>
Distributions Built By Amt. or %:	<input type="text" value="A - Amount"/>	Auto Assign Employee Number:	<input checked="" type="checkbox"/>
Apply Leave Used or Earned First:	<input type="text" value="E - Earned First"/>	Next Available Employee Number:	<input type="text" value="001161"/>
Leave Code for State Sick:	<input type="text" value="07 STATE SICK"/>	School Year for PEIMS Codes:	<input type="text" value="2018"/>
Leave Code for State Personal:	<input type="text" value="08 STATE PERSON"/>	Use Emp Nbr or SSN in EFT File:	<input type="text" value="S - Social Security Nbr"/>
Update Actual Hours From Payroll Processing:	<input checked="" type="checkbox"/>	Set Demo Alpha Fields to Uppercase:	<input type="checkbox"/>

Automatically Compute

Pay Rate:

Daily Rate:

Dock Rate:

Accrual Rate:

Overtime Rate:

W-2 Print Options

TRS:

HLTH:

CAF:

NTA:

TXA:

TFB:

Default Overtime Object Code

Professional:

Para-Professional/Hourly:

Other:

Human Resources > Tables > Tax/Deductions > Exemptions

Per IRS requirements, exemptions will no longer be used as of the 2020 calendar year. As a result, all data fields were removed from this tab for calendar years greater than 2019 and the following message is displayed: Exemption data is no longer valid.

Tables > Tax/Deductions SessionTimer: 239 min and 57 sec

Save

Calendar Year: **Retrieve** **Delete**

Exemptions | **Income Tax** | FICA Tax | Unemployment | TRS Rates | 457 Def Comp | Workers' Comp | Deduction Cd

Print

Exemption data is no longer valid.

Human Resources > Tables > Tax/Deductions > Income Tax

Per IRS requirements, modified this tab to accommodate the income tax guidelines for calendar years greater than 2019.

For tax years less than or equal to 2019, the original data fields are displayed (except for the table column headers, which changed per IRS documentation) and data is saved per marital status and per pay frequency.

For tax years greater than or equal to 2020, the new data fields are displayed and data is saved per the following guidelines:

The pay frequency for these rate tables will be empty as the rate tables are now stored as annual amounts. When payroll calculations are processed, the rates will be divided by 26, 24 and 12 for each of the respective pay frequencies (4, 5, and 6).

- A - Standard / Married filing jointly
- B - Standard / Single or Married filing separately
- C - Standard / Head of household
- D - Higher / Married filing jointly
- E - Higher / Single or Married filing separately
- F - Higher / Head of household

Codes G, H, and I are used for individual exemption or credit amounts:

- G - Allowance amount
- H - Credit amount for qualifying children under age 17
- I - Credit amount for other dependents

Tables > Tax/Deductions SessionTimer: 239 min and 36 sec

Save ↓ Calendar Year: 2020 Retrieve Delete

Exemptions **Income Tax** FICA Tax Unemployment TRS Rates 457 Def Comp Workers' Comp Deduction Cd

Print

Allowance amount: 4,200.00
 Credit amount for qualifying children under age 17: 2,000.00
 Credit amount for other dependents: 500.00

Single/ Biweekly

Withholding Rate Schedule
 Standard
 Higher

Filing Status
 Married filing jointly
 Single or Married filing separately
 Head of household

Delete	At least	But less than	The tentative amount to withhold is	Plus this percentage	of the amount that the Adjusted Annual Wage exceeds
	0	11,800	0.00	0.0%	0
	11,800	31,200	0.00	10.0%	11,800
	31,200	90,750	1,940.00	12.0%	31,200
	90,750	180,200	9,086.00	22.0%	90,750
	180,200	333,250	28,765.00	24.0%	180,200
	333,250	420,000	65,497.00	32.0%	333,250
	420,000	624,150	93,257.00	35.0%	420,000
	624,150	999,999	164,709.50	37.0%	624,150

Refresh Details + Add

Human Resources Tables > Tax/Deductions > Earned Income Credit

Removed this tab as it is obsolete.

Human Resources > Tables > Workday Calendars > Accrual Calendar

Corrected the sorting issue on the report.

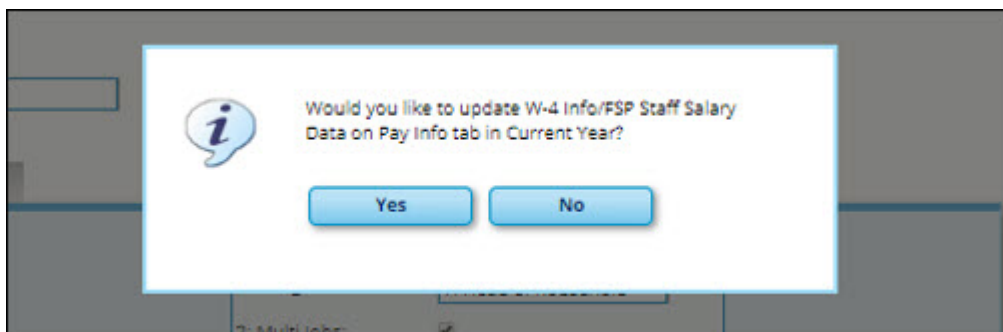
Human Resources > Maintenance > Staff Job/Pay Data > Pay Info

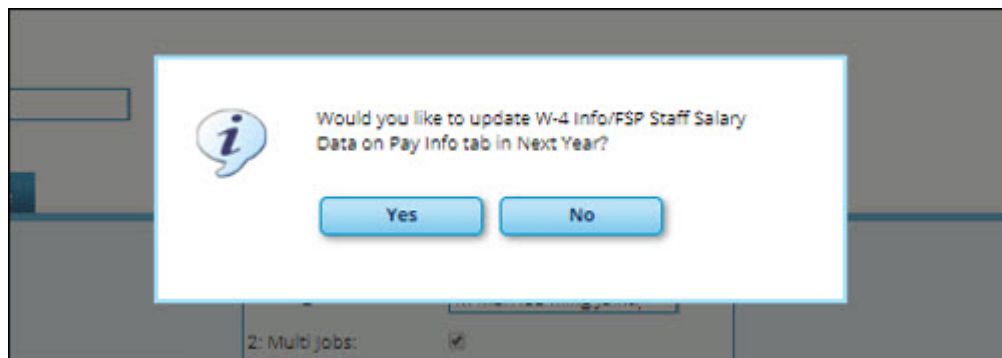
Removed the **EIC Code** field as it is obsolete.

Per IRS requirements, added the **W-4 Withholding Certificate** section with the following fields:

- **1: Filing Status**
- **2: Multi-Jobs**
- **3: Children under 17**
- **3: Other Dependents**
- **3: Other Exemptions**
- **4a: Other Income**
- **4b: Other Deductions**

Modified the program to provide an option to update the W-4 fields (new and existing) in the alternate pay frequency. For example, if the employee has an existing pay info record in the alternate pay frequency (CYR to NYR or NYR to CYR), a message is displayed prompting you to update the alternate pay frequency. If you accept the update, the new **W-4 Withholding Certificate** fields and the existing **W-4 Marital Status** and **Exemptions** fields are updated for the employee in the alternate pay frequency.





Human Resources > Maintenance > Staff Demo > Responsibility

Added validation to allow the following PE service IDs. Also, included the service IDs in the **Service ID** ellipsis.

- 02530004
- 02530005
- 02530006
- 02530007
- 02530008
- 82210XXX
- 82931XXX
- 83210XXX

Human Resources > Maintenance > Hours/Pay Transmittals > Abs Ded

Corrected the issue that caused an error message about having a salary adjust code to be displayed when using the duplicate feature to duplicate absence deduction and coded absence deduction transmittals.

Human Resources > Payroll Processing

Modified the payroll calculations to handle the withholding tax calculations based on the new IRS W-4 requirements. These changes are effective for pay dates beginning 1/1/2020.

Human Resources > Payroll Processing > TRS Processing > Extract

Corrected the RP20 extract to include the correct number of actual hours worked when the pay date has duplicate reported hours.

Human Resources > Utilities > Install Salary/Tax Tables

Per IRS requirements, the following changes were made to accommodate the new W-4 guidelines.

- Removed the **Fed Income Exempt** field from the **Tables** section.
- Removed the **Frequency** section as it is no longer applicable.
- Modified the **Fed Income Tax** table to accept import files without a pay frequency and with **Tax Rate Codes A-I**.

Utilities > Install Salary/Tax Tables SessionTimer: 239 min and 47 sec

Tables

- State Salary
- Job Code
- Fed. Income Tax
- FICA Tax Rates
- TRS Rates

Process Specifications

School Year: **2020**

Import Path: **None**
(e.g. c:\rsc2k\datafile.txt)

Browse **Execute**

Current-Next Year

- Current Year
- Next Year

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

- Per IRS requirements, updated the W-2 forms and all W-2 functionality to support the 2019 tax year.
- Removed the **W2 Forms - 3 Up (U)** parameter option as this version of the form is no longer available.
- Modified the **Non-preprinted 3 Up (N)** parameter option to print the W-2 form instructions on the back of the form three times per page.
- Added the **Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)** parameter to indicate your printing preference for the W-2 form instructions when the **Non-preprinted 3 Up (N)** parameter option is selected and the tax year is greater than 2018. If the tax year is less than or equal to 2018, no instructions are printed on the back of the form regardless of the selection in this parameter.

Reports > HR Reports > Quarterly/Annual Reports > W-2 Forms SessionTimer: 235 min and 40 sec

[Return to Reports](#)

Report ID: HRS5100
Frequency: 5
User ID:

Parameter Description	Value
Validation Rpt (V); W2 Forms - Copy A (A), Non-preprinted 3 Up (N); or W2REPORT File (F)	V
For Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)	N
Final Run - Create W-2 Historical Record ? (Y/N)	N
Sort by Alpha (A), SSN (S), or Pay Campus (C)	A
Tax Year (####)	2019

[Run Preview](#)

[Clear Options](#)

- Modified the program to reference the **W-2 Print Options** section on the Human Resources > Tables > District HR Options page allowing you to select the amounts to be printed on the employee W-2 form (Box 14). This change also applies to W-2 forms printed from ASCENDER EmployeePortal.

Modified the program to use the long version of the employee name when extracting names for W-2 forms. This change applies to the following parameter options: **Validation Report (V)**, **Copy A (A)**, and **Non-preprinted 3 Up (N)**. The program does not truncate characters for the **W2Report File (F)** option.

- The maximum length allowed for the full name is 28 characters.
- If the length of the full name exceeds the allowed length, the name is truncated.
- The middle name always displays a single middle initial.
- The first name may be truncated to a single initial depending on the length.

Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 -1095-B Forms & HRS5255 - 1095-C Forms

Corrected the issue that prevented the complete Social Security number from being on the Comparison report even if the **Print SSN (S)**, or **Masked SSN (M)** parameter is set to S.

Human Resources > Reports > User Created Reports > HR Report

Updated the **Pay Information** section as follows:

- Removed the **EIC Code** as it is obsolete.
- Added the new W-4 fields:
 - **Multi Job**
 - **Nbr Children**
 - **Filing Status**
 - **Nbr Other Depend**
 - **Other Deduct Amt**
 - **Other Exempt Amt**
 - **Other Income Amt**

The screenshot shows the 'Pay Information' section of the HR Report configuration interface. A red circle highlights the following fields:

<input type="checkbox"/> Pay Stat	<input type="checkbox"/> Pay Campus	<input type="checkbox"/> Tax Exempt	<input type="checkbox"/> W4 Marital Status	<input type="checkbox"/> Unemployment Flg	<input type="checkbox"/> TRS Status	<input type="checkbox"/> TRS Begin Date	<input type="checkbox"/> FSP Staff Data Cd
<input type="checkbox"/> Pay Dept	<input type="checkbox"/> Campus Name	<input type="checkbox"/> Other Exempt	<input type="checkbox"/> FICA Exempt	<input type="checkbox"/> Health Ins Code	<input type="checkbox"/> End 90 Day Period	<input type="checkbox"/> Dock Rate	<input type="checkbox"/> W-4 Filing Status
<input type="checkbox"/> W-4 Multi-jobs	<input type="checkbox"/> W-4 Children under 17	<input type="checkbox"/> W-4 Other Dependents	<input type="checkbox"/> W-4 Other Exemptions	<input type="checkbox"/> W-4 Other Income	<input type="checkbox"/> W-4 Other Deductions		

Purchasing

Purchasing > Maintenance > Create/Modify Requisition

Corrected various page usability issues to improve the user experience.

Purchasing > Maintenance > Receiving

- Modified the program to exclude completed pending payable transactions.

- Modified the program to display a message indicating that one of the following conditions exists for the purchase order that was retrieved. The message is displayed again when the record is saved.
 - The purchase order is fully liquidated.
 - The purchase order has check transactions that were created using the Finance > Maintenance > Postings > Check Processing - PO tab.

Purchasing > Maintenance > Receiving > Bundled/Bid Requisitions

- Modified the program to create records in the pending payables table instead of the check or credit card transaction tables when receiving bundled requisitions.

Warehouse**Warehouse > Maintenance > Receive Inventory Items**

- Modified the program to exclude completed pending payable transactions.



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