ASCENDER Business Release Notes

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ASCENDER Release 6

ASCENDER 6.0900

Release Date: 5/13/2022 **ASCENDER Update**: 6.0900

Approval Summary

❏ Corrected the program to only display the Accounts Receivable > Invoice Approval link if the logged-on user has pending invoice approvals.

Finance > Reports > Finance Reports > Summary/Miscellaneous Reports > FIN3800 - Statement of Financial Position

❏ Corrected the issue that caused an out-of-balance condition to occur in the 15XX (Land, Buildings, and Equipment) account if there were outstanding encumbrances.

Purchasing > Maintenance > Reverse Purchase Order

Purchasing > Next Year > Maintenance > Reverse Purchase Order

❏ Corrected the issue that generated a Bad Request error page after clicking the **Close** button in the Purchase Order detail pop-up window.

Prior Release Notes for ASCENDER 6

Update: 6.0800

ASCENDER 6.0800

Release Date: 3/30/2022 **ASCENDER Update**: 6.0800

A Budget.war file is being released with the ASCENDER 6.0800 Update to address a Wildfly 18 compatibility issue.

Update: 6.0700

ASCENDER 6.0700

Release Date: 3/10/2022 **ASCENDER Update**: 6.0700

Approval Summary

❏ Corrected the program to only display the Accounts Receivable > Invoice Approval link if the logged-on user has pending invoice approvals.

Accounts Receivable > Tables > Customer Information

❏ Modified the program to prevent the first (default) customer record in the database from being retrieved and edited as updates to this record can cause issues in Accounts Receivable and Finance.

Accounts Receivable > Maintenance > Invoice Approval

❏ Added validation to prevent approvers from clearing required fields (**Unit Price**, **Item Total**, **Amount**, **Offset** accounts) on an invoice and then proceeding with approval.

Accounts Receivable > Maintenance > Invoice Inquiry/Customer Notes > Inquiry

❏ Added the **Credit Memo** section with the following columns:

- **Credit Memo Nbr**
- **Adjust Reason**
- **Account Code**
- **Amount**
- **User ID**

Bank Reconciliation > Tables > Reconciliation Layout > Categories

❑ Corrected the program to always display the **+Add** link. Previously, the **+Add** link was removed when all categories were deleted from the page.

Finance > Tables > District Finance Options 2

❑ Corrected the issue that caused the value in the **Next Available Travel Request Number** field to be converted and saved as invalid data in the database.

Finance > Tables > Bank Codes > Bank Codes

❑ Corrected the program to retain the sort order for the **Bank Name** column after using the pagination feature.

Finance > Maintenance > Postings

❑ Corrected various user interface issues to improve the user experience across all tabs including placing the cursor focus on the **PO Number** field after liquidating a purchase order on the Check Processing - Purchase Order tab.

Finance > Utilities > Fiscal Year Close

❑ Modified the program to properly handle adjustments, credit memos, and payments for invoices allowing accurate information to be displayed on the Accounts Receivable > Reports > Accounts Receivable Reports > BAR4000 - Invoice Listing by Revenue Code report.

Finance > Utilities > Positive Pay Export

❑ Corrected the PDF file to display all available records. Previously, only the first page of records was displayed.

Finance > Reports > Finance Reports > Summary/Miscellaneous Reports > FIN3800 - Statement of Financial Position

❑ Corrected the out-of-balance condition that occurred when an LEA had encumbrances in balance sheet accounts (object codes 1XXX, 2XXX, 3XXX, and 4XXX). Now, the Total Assets equal Total Liabilities plus Net Assets, and the report is in balance.

Grants and Projects > Inquiry > GL Inquiry

❑ Modified the program to display the correct realized revenue/expenditure totals when retrieving data from different file IDs.

❑ Modified the program to remove the **Est Rev** (Estimated Revenue) and **Approp** (Appropriation) columns from the summary view but still display them in the detailed view.

Payroll > Maintenance > Approve CIP

❑ Modified the program to correctly calculate the **State Min Salary** and **Pct Assigned** on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab after approving a CIP.

Payroll > Payroll Processing > Run Payroll

❑ Corrected the issue that prevented the **Employer Contrib** field from being populated on the HRS2200 - Payroll Earnings Register. Now, the correct EIC amount from the Pre-Post report is displayed.

Payroll > Utilities > Mass Delete > YTD Transactions

❑ Corrected the program to only process the deletion if the user clicks **Yes** in the “Do you want to process?” pop-up window. Previously, data was deleted regardless of the user's selection (**Yes**/**No**).

Payroll > Utilities > Salary Simulation > Simulation Options

❑ Corrected the issue that caused the **Cancel** button to display as **0** on the Salary Simulation - Error Listing.

Payroll > Utilities > Imputed Income Extract

❑ Corrected the spelling of Deductions in the following message: “Extracted Imputed Income Deductions saved successfully.”

Payroll > Utilities > FFCRA Payments

❑ Removed this menu item as it is now obsolete and should no longer be used.

Payroll > Reports

❑ Modified the following reports to include the correct 403B FICA Contribution amounts.

- Year to Date Reports > HRS3050 - School YTD Report
- Year To Date Reports > HRS3250 - YTD Account Distribution Journal
- Year To Date Reports > HRS3450 - YTD Payroll Control Listing
- Payroll Reports > HRS2000 - Payroll Control Listing

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

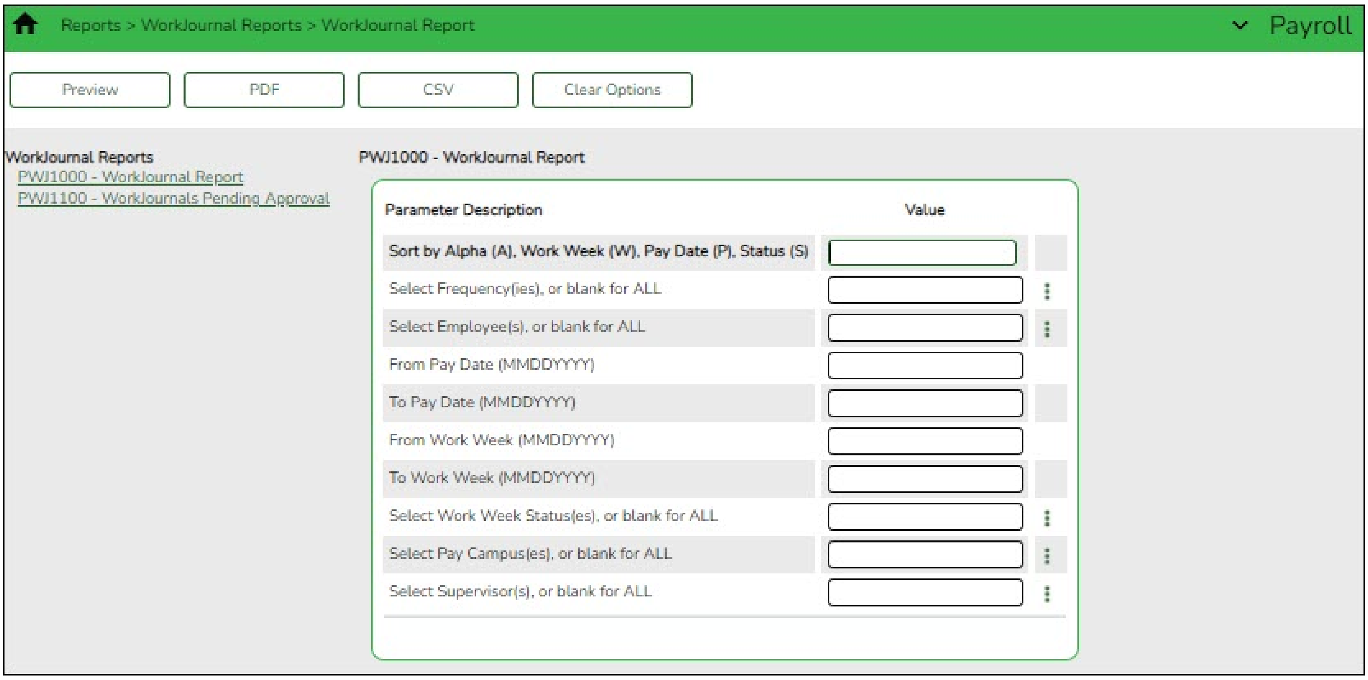
❑ Removed the CSV option. As a result, the **CSV** button was disabled on the report parameters page and the CSV icon was removed from the report.

Payroll > Reports > Payroll Reports > HRS2200 - Payroll Earnings Register

❑ Corrected the issue that prevented the **Employer Contrib** field from being populated on the report. Now, the correct EIC amount from the Pre-Post report is displayed.

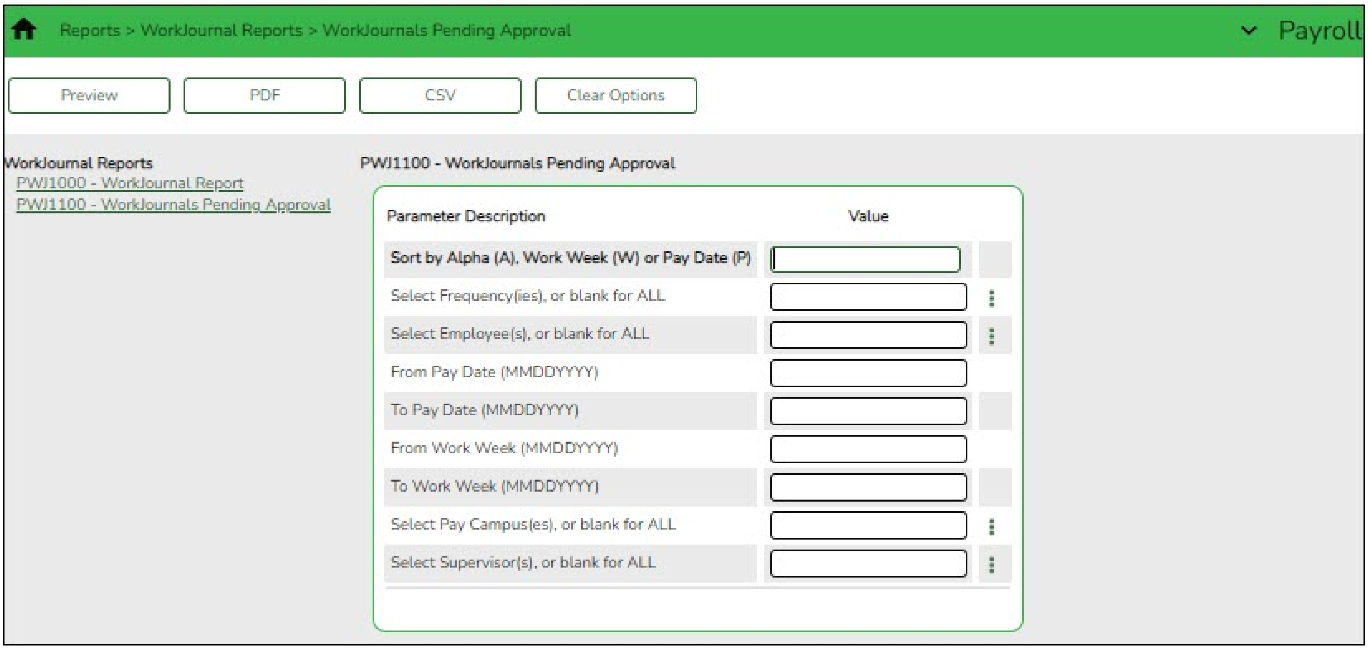
Payroll > Reports > WorkJournal Reports > PWJ1000 - WorkJournal Report

❑ Added this report to provide a detailed listing of employee WorkJournal timesheet entries.



Payroll > Reports > WorkJournal Reports > PWJ1100 - WorkJournals Pending Approval

❑ Added this report to provide a listing of employee WorkJournal timesheet entries pending approval.



Payroll > Reports > Year To Date Reports > HRS3450 - YTD Payroll Control Listing

❑ Removed the CSV option. As a result, the **CSV** button was disabled on the report parameters page and the CSV icon was removed from the report.

Payroll > Reports > Year To Date Reports > Calendar Year To Date Report > HRS3550 - School YTD Accrual Payroll Account Distr

❑ Corrected the program to properly generate the report. Previously, the report was blank.

Payroll > Reports > Payroll Information Reports > HRS1650 - Employee Salary Information

❑ Corrected the report to only display the employee's current W-4 information from the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab.

- If the **W-4 Withholding Certificate** information is updated for the employee, then only the new information is displayed.
- If the **W-4 Withholding Certificate** information is not updated for the employee, then the **Nbr Exempts** field is displayed and the **W4 Filing Status** field is populated with the **W-4 Marital Status**.

Personnel > Maintenance > Staff Demo > Demographic Information

❑ Modified the **Legal** (First, Middle, Last, Maiden) and **Former** (First, Middle, Last) name fields to allow a maximum of 60 characters.

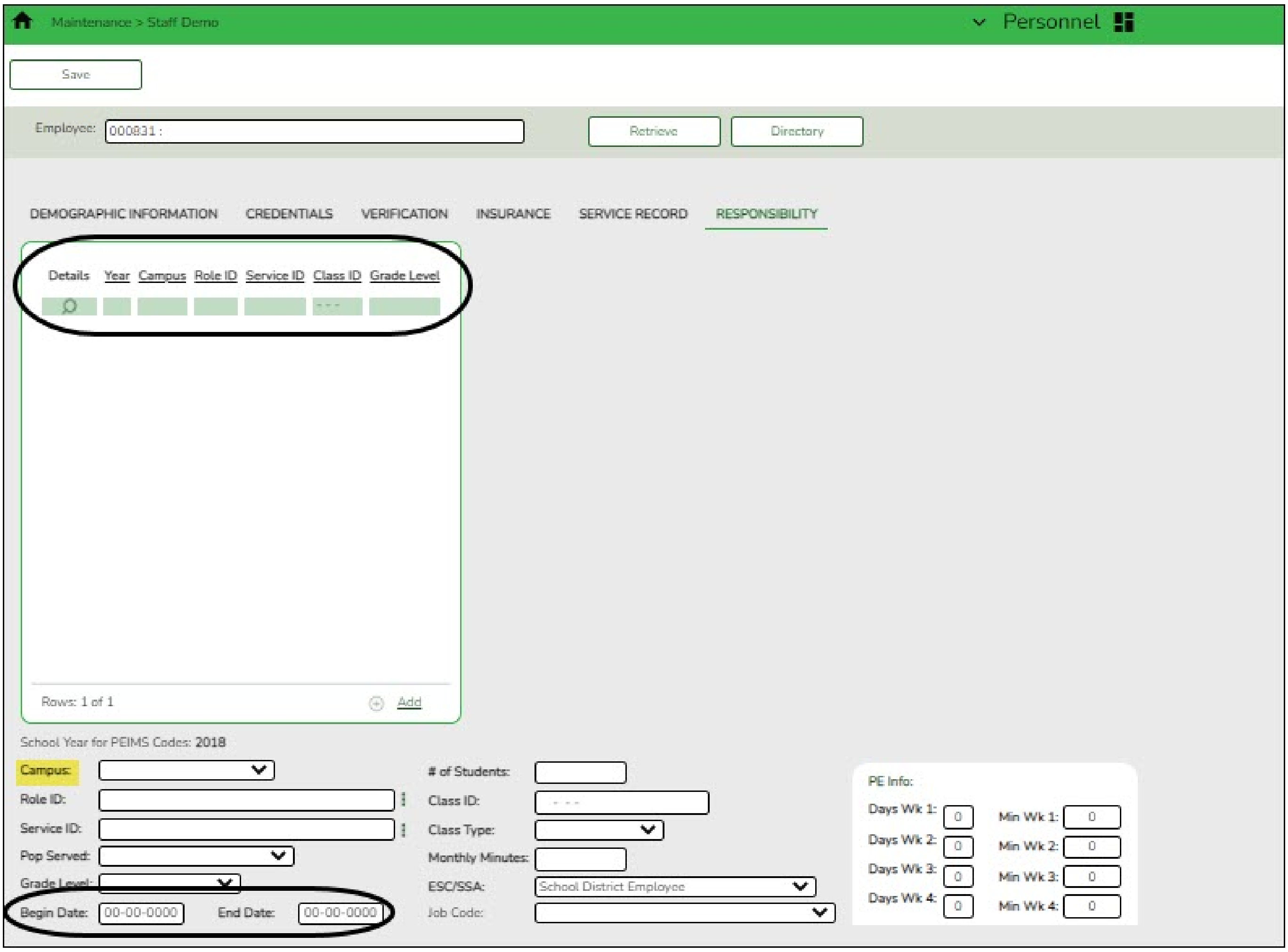
❑ Corrected the Document Attachments functionality to properly load the Document Options window after clicking the **Documents** button. Previously, a blank window was displayed.

Personnel > Maintenance > Staff Demo > Responsibility

❑ Modified the program as follows to support the TSDS Staff Extension requirements:

- Removed all columns from the grid except the **Year**, **Campus**, **Role ID**, **Service ID**, **Class ID**, and **Grade Level**.

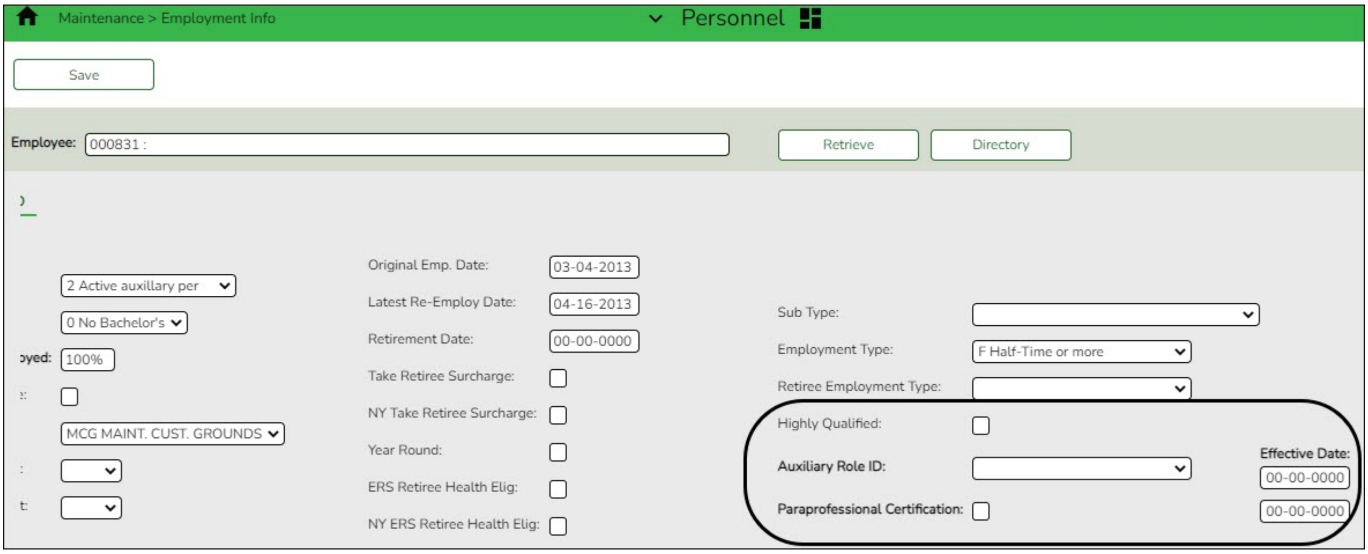
- Removed the delete functionality (trashcan icon) from the grid.
- Added the **Begin Date** and **End Date** fields to enter the employee's begin and end dates in a selected role ID.
- Bolded the **Campus**, **Begin Date**, and **End Date** field names to easily identify these fields as TSDS PEIMS reporting elements.
- Updated to only display responsibility records with a school year matching the **School Year for PEIMS Codes** value.



Personnel > Maintenance > Employment Info

❑ Modified the program as follows to support the TSDS Staff Extension requirements:

- Renamed the **PEIMS Auxiliary Role ID** field to **Auxiliary Role ID**.
- Added an **Effective Date** field next to the **Auxiliary Role ID** field to enter a begin date for the employee's selected auxiliary role ID.
- Added an **Effective Date** field next to the **Paraprofessional Certification** check box to enter a begin date for the employee's paraprofessional certification.
- Moved the **Highly Qualified** check box to display above the **Auxiliary Role ID** field.
- Bolded the **Auxiliary Role ID**, **Paraprofessional Certification**, and **Effective Date** field names to easily identify these fields as TSDS PEIMS reporting elements.



Personnel > Tables > Job/Contract > Contract Class

❑ Added validation to the **Contract Class Code** field to only allow numeric (0-9) and alpha (A-Z) values to be saved. Also, to prevent duplicate contract class codes from being saved.

Personnel > Tables > Workday Calendars

❑ Corrected the program to prevent workday calendars with an invalid pay frequency from being saved. As a result, workday calendars with invalid pay frequencies will not be displayed on the Copy School Calendar and Delete School Calendar tabs.

Personnel > Utilities > Mass Update > Employee

❑ Corrected the issue that caused multiple records to be displayed for an employee when incrementing the **Prior Teaching Experience** field and selecting multiple job codes. Now, only one record per employee is displayed instead of one record per job code.

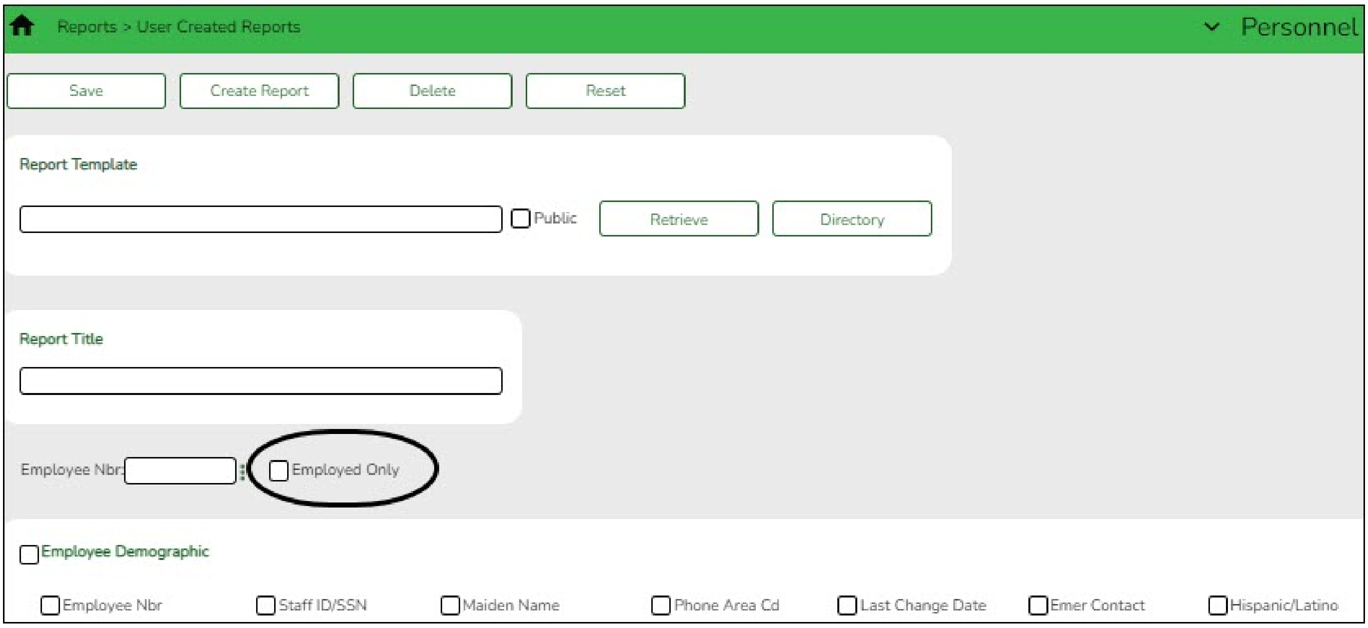
❑ Corrected the program to only enable the **Job Code** ellipsis if the **Prior Teaching Experience** field is selected (enabled).

Personnel > Reports > Payroll Information Reports > HRS6550 - Employee Extra Duty Report

❑ Corrected the issue that prevented extra duty codes from being displayed in the Extra Duty Codes lookup for the **Select Extra Duty Code(s), or blank for ALL** parameter.

Personnel > Reports > User Created Reports

❑ Renamed the **Active Only** check box to **Employed Only**. If selected, employees who are currently employed are included based on the current date, employment date, reemployment date, and term date.



Position Management > Maintenance > PMIS Position History

❑ Corrected the program to allow the deletion of a record (row) when applicable. If a record cannot be deleted, an error message will be displayed.

Position Management > Maintenance > PMIS Supplement Modify

❑ Modified the program to automatically clear the **Nbr Extra Days**, **Attached to Position**, and **Billet** fields when vacating a position that has a stipend with extra days.

❑ Modified the program to prevent Occupant data from being entered when the billet is 00000.

❑ Added validation to clear the **Date Inactivated** and **Reason Inactivated** fields on the Date tab if the position's original "saved" status was not *Inactive*.

Position Management > Maintenance > PMIS Change In Position

❑ Modified the program to automate and sync the termination dates in Position Management and Personnel. If a termination date exists on the Personnel > Maintenance > Employment Info tab, it will be automatically populated when processing a CIP. Or, if a termination date is entered on a CIP, it will be automatically populated on the Personnel > Maintenance > Employment Info tab.

Position Management > Maintenance > PMIS Change In Position > Change In Compensation

❑ Corrected the program to display all applicable supplements on the Payroll > Maintenance > Staff Job/Pay Data > Distributions tab after processing a CIP. Previously, only some supplement records were displayed.

❑ Corrected the issue where the remaining amount and remaining payments were being updated for G type supplement positions after processing a CIP.

❑ Corrected the issue that prevented the pay rate, contract amount, and contract balance from being updated for new G type supplement positions when there was a processed supplemental transmittal for a prior month.

❑ Modified the program to use the **TEA Base** amount from the Personnel > Tables > Salaries > State Minimum tab when calculating the state minimum salary for employees on a local annual pay concept with a TRS position code of 02 or 05.

❑ Modified the annualized salary calculation to use 12, 24, or 26 (based on the pay frequency) payments for comparison. Previously, the **Max Pymts** value was used.

Position Management > Maintenance > PMIS Change in Position > Non-Comp Funding Changes

❑ Corrected the program to prevent error message “Remaining Payments must be greater than zero” from being displayed when trying to process changes for pay type 3 employees with zero remaining payments.

Position Management > Maintenance > PMIS Forecast Change

❑ Corrected the issue that caused the values in the **Percent Day Employed** and **Percent Year Employed** fields to be ignored even though the **Display Options to Ignore Pct of Day and Pct of**

Year for Position Records check box was not selected on the District Administration > Options > Position Management page.

Position Management > Inquiry > PMIS Campus Supplement Position Inquiry

❏ Corrected the program to display a scrollbar as needed in order to view all data on the page.

Position Management > Utilities > Import Position Records

❏ Corrected the program to display error message “Invalid length for ACCT_PCT” instead of “Invalid length for ACCT_AMT” when importing a CSV file with an invalid account percent.

Position Management > Utilities > Salary Simulation (NYR)

❏ Corrected the Forecast Account Distribution Journal by Salary Account report to list each individual vacancy for a position number by account code and billet number. Previously, the report combined all vacant positions in a single row.

Position Management > Utilities > Create Forecast Positions (NYR)

❏ Corrected the program to limit the warning messages displayed for the **Total Pct of Day** and/or **Total Pct of Year** fields to P type positions. Previously, when creating forecast positions in NYR for an employee with both a regular and supplement position, a warning indicating that the employee exceeded 100% of the day was displayed. Now, the warning only displays if the employee has two or more regular positions that exceed 100% of the day and the LEA does not have the **Ignore % of Day** field selected for those positions. This warning does not apply to supplement positions.

Position Management > Reports > PMIS Reports > HRS8055 - Acct Code Comparison - PMIS vs Payroll

❏ Corrected the account code comparison for supplement positions tied to extra duty codes. The report now recognizes when a G type stipend is in Payroll and Position Management.

Purchasing > Maintenance > Approve Requisition

❏ Modified the program to incorporate additional information to track requisition changes.

- If a requisition with pending changes is being returned or skipped, a pop-up window with the requisition details (**Req Nbr**, **Vendor Nbr**, and **Vendor Name**) and a message indicating that there are pending changes is displayed.
- If a requisition without pending changes is being returned, a pop-up window with the requisition details (**Req Nbr**, **Vendor Nbr**, and **Vendor Name**) is displayed.
- If a requisition without pending changes is being skipped, a pop-up window is not displayed.

CareerPortal

CareerPortal > Job Dashboard

❏ Corrected the issue that prevented an applicant from viewing their submitted job applications.

CareerPortal > Posted Jobs

❏ Modified the error message that is displayed when a user tries to delete a job posting without the appropriate rights.

EmployeePortal

EmployeePortal > Forgot Password

❑ Corrected the issue that prevented all necessary fields from being displayed on the page. Previously, only the **Social Security Number** field was displayed.

EmployeePortal > Notifications

❑ Added the **Mark All As Read** button to the Notifications box and page allowing users to mark all notifications as read.

EmployeePortal > Leave Requests

❑ Removed the filter only allowing leave requests created within 60 days of the current date to be displayed under **Unprocessed Leave Requests**. Now, all unprocessed leave requests are displayed.

❑ Corrected the program error that occurred when selecting a leave type from the **Type** drop down.

EmployeePortal > Travel Reimbursement Requests > Travel Requests

❑ Corrected the program to reference the **Next Available Travel Request Number** in Finance when submitting a new travel request.

EmployeePortal > Travel Reimbursement Requests > Approve Travel Requests

❑ Corrected the issue that caused a travel request to remain on the page even after being approved by the final approver. Also, corrected the issue that caused an additional workflow entry to be created for the final approver.

❑ Modified the program to display the applicable error message when the final approver approves a travel request but the **Automatic PA Number Assignment** field is not selected on the Finance > Tables > District Finance Options > Finance Options tab. Previously, an error message was not displayed and the travel request remained in a pending status.

Update: 6.0600

ASCENDER 6.0600

Release Date: 2/04/2022 **ASCENDER Update**: 6.0600

Finance > Tables > District Finance Options 2

❑ Modified the **Mileage Reimbursement Rate** and **New Mileage Reimbursement Rate** fields to allow three decimal places in the value. Now, the mileage rates are correctly displayed and calculated on the following pages:

- Finance > Inquiry > Travel Reimbursement Inquiry
- EmployeePortal > Travel Reimbursement Requests > Travel Requests

Update: 6.0425

ASCENDER 6.0425

Release Date: 01/10/2022 **ASCENDER Update**: 6.0425

Grants and Projects > Tables > SSA Grants > Payment Dates

❑ Corrected the issue that caused an error message to be displayed when trying to change and save a payment date.

Grants and Projects > Maintenance > Member Grants > Object Maintenance

❏ Corrected the issue that caused an error message to be displayed when trying to save new grant object data.

Update: 6.0405

ASCENDER 6.0405

Release Date: 12/14/2021 **ASCENDER Update**: 6.0405

Payroll > Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

❏ Corrected the program to print the correct tax year (2021) on W-2 forms when the report is generated with the **For Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)** parameter set to *N*.

Update: 6.0400

ASCENDER 6.0400

Release Date: 12/10/2021 **ASCENDER Update**: 6.0400

❏ Corrected various pages in the following applications to only display the **Provide Feedback** link once:

- Budget
- Finance
- Payroll
- Personnel
- Position Management
- Purchasing

Finance > Maintenance > Vendor Information > Vendor Miscellaneous

❑ Modified the **Copy from Payroll** button functionality to use the Finance bank code instead of the Payroll bank code.

- If the bank code does not exist in Finance, an error message is displayed prompting the user to add a new bank code in Finance.
- If the employee does not have a bank record in Payroll, an error message is displayed informing the user.

❑ Corrected the **Copy from Payroll** button to only display if the vendor and employee SSN records are valid and match.

❑ Corrected the program to display the vendor number and name in the **Vendor** field at all times. Previously, the vendor number no longer displayed after changes were saved to other fields on the page.

Finance > Maintenance > Create Chart of Accounts

❑ Corrected the issue that prevented account codes with a 99 function code and an 8XXX object code from being created.

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

❑ Corrected the trashcan icon to remain displayed when adding a new line item.

Finance > Maintenance > Postings > Journal Actual

❑ Added the **Ignore for Grants and Projects** check box to the Duplicate JV pop-up window to ignore JV entries for the Grants and Projects application. This check box is only enabled if duplicating an Actual JV transaction.

Finance > Inquiry > GL Inquiry > GL Inquiry

❑ Corrected transaction and balance issues within the spyglass pop-up window.

Finance > Inquiry > GL Inquiry > GL Account Summary

❑ Corrected the spelling of Revenue in the Estimated and Realized Revenue column headings on the report preview and PDF.

Finance > Utilities > Out of Balance Correction

❑ Corrected the program to prevent incorrect balances to be calculated and saved.

Finance > Utilities > Positive Pay Export

❑ Corrected the export to prevent the value in the **Vendor Name** field from being used as the **Pay To** value if a DBA or Remittance Name and Address is available when using the Pending Payables and the PO/PA processes together. Previously, a single check transaction was separated into two transactions and although the check numbers were the same, the Pending Payable transaction amounts were populated with the value from the **Vendor Name** field on the Vendor Information page and the other transaction amounts processed through PO/PA were populated with the value from the **Vendor Remittance** field.

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

❑ Per IRS requirements, updated the 1099-MISC/1099-NEC forms/instructions and all 1099-MISC/1099-NEC functionality to support the 2021 tax year.

Grants and Projects > Tables > Manage Users

❑ Corrected the **Module** column in the database to display GRT2160 Manage Users when adding or updating grant type information for a user.

Grants and Projects > Maintenance > Member Grants > Grant Maintenance

❑ Corrected various user interface issues to improve the user experience.

❏ Corrected the **Module** column in the database to display GRT3010 Mbr Grant Maint for deleted transactions.

Grants and Projects > Maintenance > Approval Dashboard

❏ Corrected the **Module** column in the database to display GRT3020 Approval Dashboard for approved/returned transactions.

Payroll > Tables > District EP Options

❏ Corrected the issue that prevented changes to the **W-2 Information** message field from being successfully saved and displayed in EmployeePortal.

Payroll > Maintenance > Calendar YTD Data > Calendar YTD

❏ Added the following **FFCRA Payment** fields for the 2021 calendar year:

- **EPSLA Regular**
- **EPSLA Two-Thirds**
- **EFMLEA**

Payroll > Maintenance > Calendar YTD Data > W2 Inquiry

❏ Added the following **FFCRA Payment** fields for the 2021 calendar year:

- **EPSLA Regular**
- **EPSLA Two-Thirds**
- **EFMLEA**

Payroll > Next Year > Copy CYR Staff to NYR & Copy NYR Staff to CYR

❏ Added the **TRS Retiree Exception** field to the process and preview report.

Payroll > Payroll Processing > TRS Processing > Payroll History

❏ Corrected the program to retrieve pay date information for the TRS month instead of the pay date month.

Payroll > Utilities > Import HR tables from Database Tables

❏ Added a new WorkJournal Comparison Report to display a list of WorkJournal records that were imported but no longer exist as payroll transmittals due to the import.

Payroll > Utilities > Import WorkJournal Requests

❏ Modified the program to prevent WorkJournal request records from being selected if the job code no longer exists on the employee's master job record.

Payroll > Reports

❏ Corrected the email content (subject/body) to mirror the letter case entered by the user. Previously, all letters were converted to uppercase.

- HRS1250 - Employee Data Listing
- HRS1650 - Employee Salary Information
- HRS2050 - Proof List of Payroll Transactions
- HRS2500 - Wage and Earning Statement
- HRS2600 - Employee Substitute Report
- HRS3500 - YTD Wage and Earning Statements
- HRS6400 - Salary Verification Report

Payroll > Reports > Personnel Reports

❏ Added the **Creditable Year of Service** field to the following reports:

- HRS1100 - Employee Verification
- HRS1250 - Employee Data Listing
- HRS1650 - Employee Salary Information

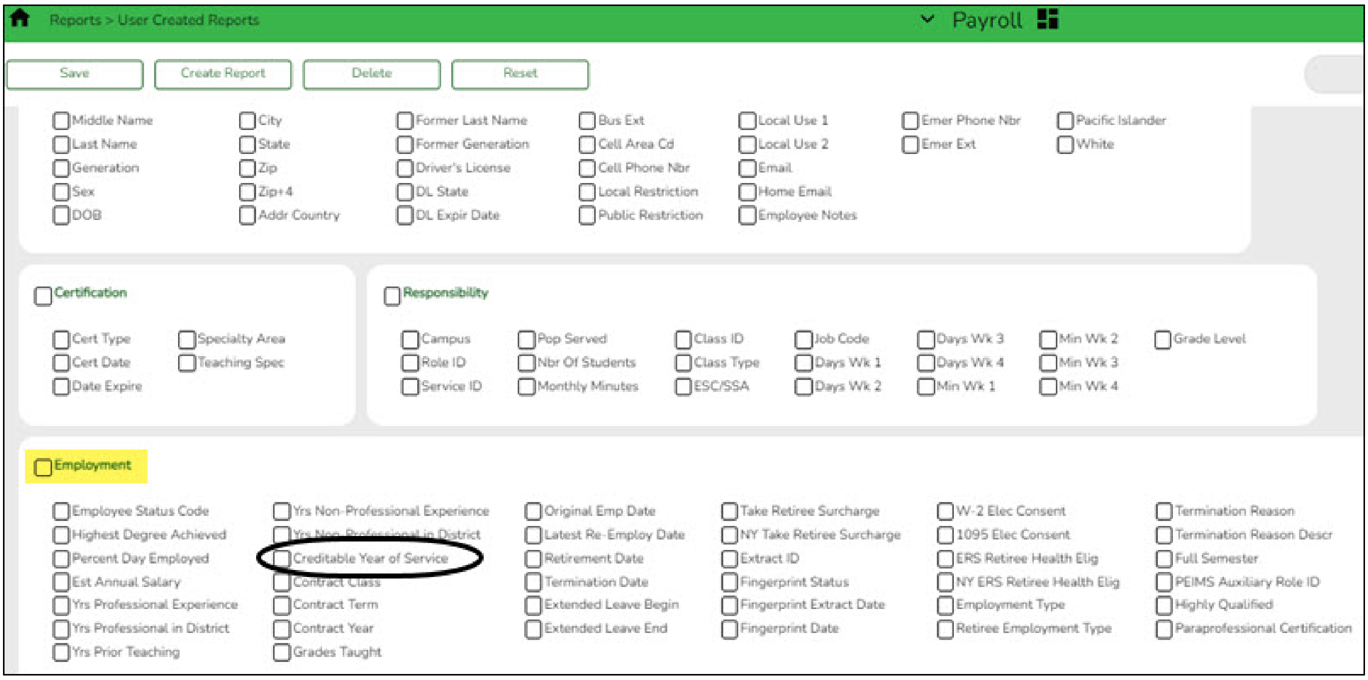
Payroll > Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

❏ Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the

2021 tax year.

Payroll > Reports > User Created Report

❑ Added the **Creditable Year of Service** check box to the **Employment** section.



Personnel

❑ Added the ability to import data into the Personnel application through an automated process. Instructions for this process are located on the TCC Technical Documentation > ASCENDER Personnel Import page in the ASCENDER Wiki.

Personnel > Tables > WorkJournal > Options

❑ Modified the program to display the Unsaved Data Warning pop-up window when applicable.

❑ Corrected the issue that caused the time conversion table to inadvertently default to pay frequency 4 even though it was not created in pay frequency 4. This issue occurred in databases with only one pay frequency.

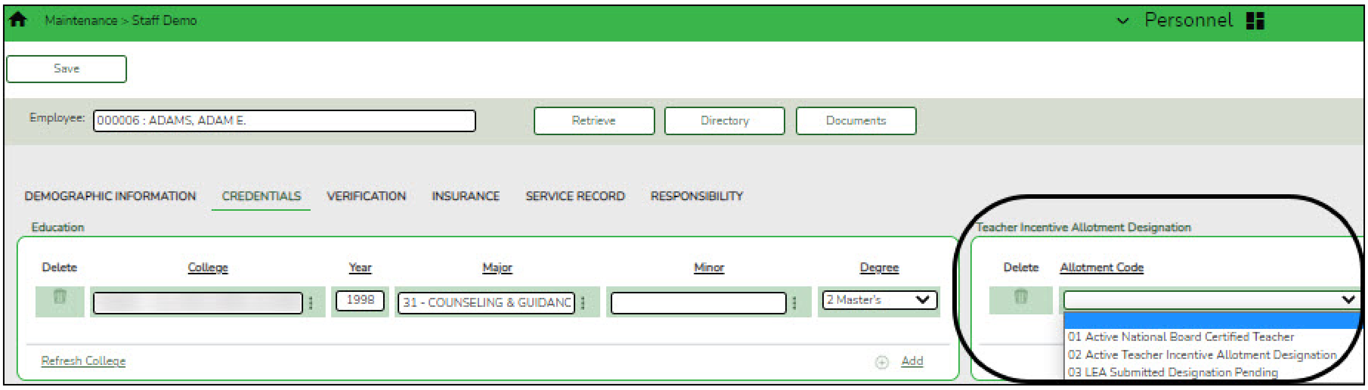
Personnel > Tables > WorkJournal > Admin

❏ Modified the Unsaved Data Warning pop-up window to set the cursor focus on the **Cancel** button.

Personnel > Maintenance > Staff Demo > Credentials

❏ Added the **Teacher Incentive Allotment Designation** section, which includes the following allotment codes and descriptions:

- *01 Active National Board Certified Teacher*
- *02 Active Teacher Incentive Allotment Designation*
- *03 LEA Submitted Designation Pending*



Personnel > Maintenance > Employment Info

❏ Added the **Creditable Year of Service** check box to the **Years Experience** section.

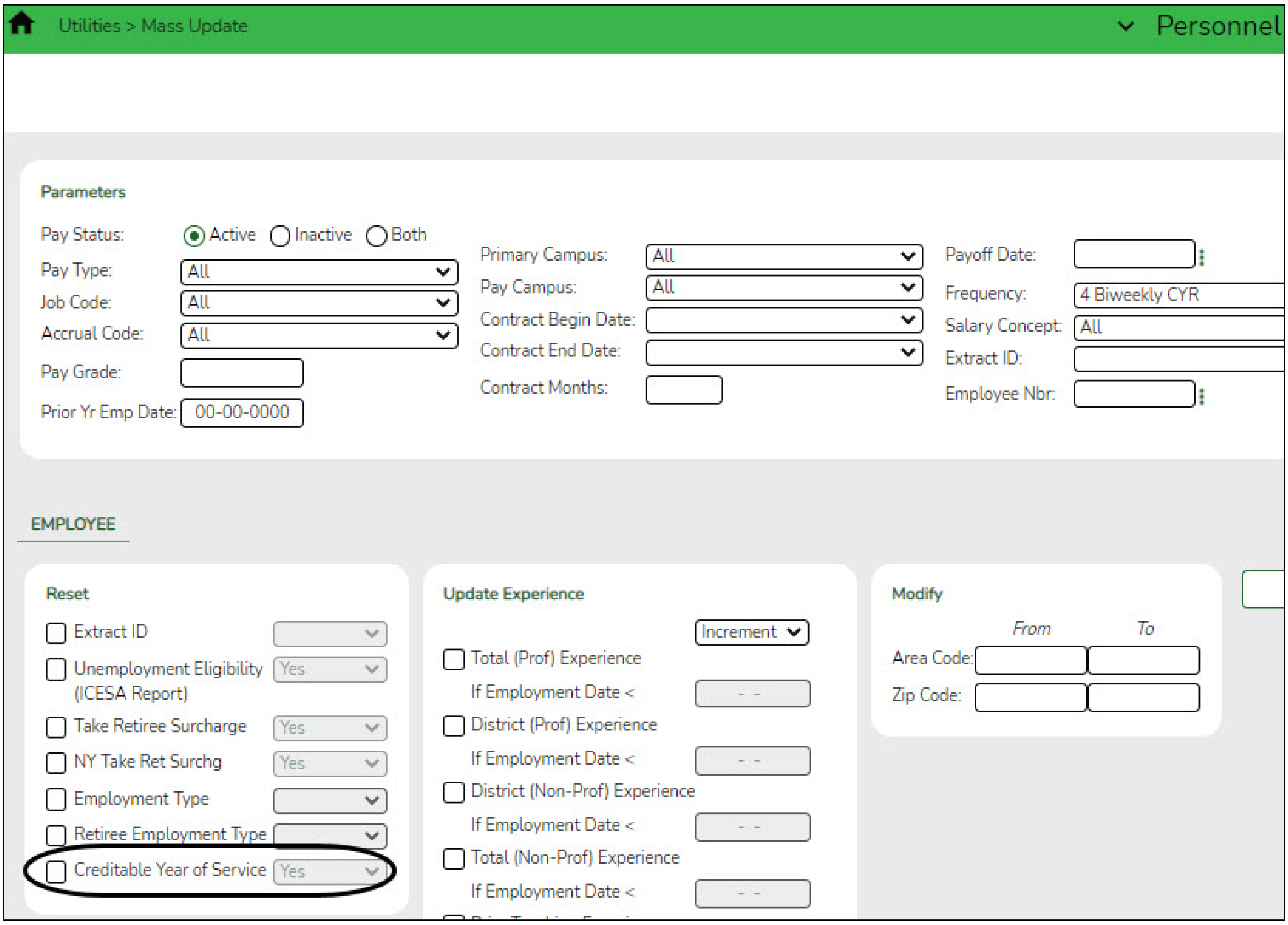
❏ Corrected the page to only display the applicable scroll bars.

Personnel > Self-Service > Pending by Alternate

❏ Corrected the issue that caused an error to occur when an employee submitted changes to their phone number via EmployeePortal.

Personnel > Utilities > Mass Update > Employee

❏ Added the **Creditable Year of Service** field under **Reset** to reset the employee's creditable year of service. Also, added the **Creditable Year of Service** column to the Employee Mass Update Report.



Personnel > Utilities > Mass Delete > Employee Data

❑ Modified the program to include the Teacher Incentive Allotment designation in the mass deletion process.

Personnel > Utilities > ACA 1094/1095 Correction/Replacement

❑ Per IRS requirements, updated the utility to support the 2021 tax year.

❑ Removed transmitter control code (TCC) validation from the ACA file creation process.

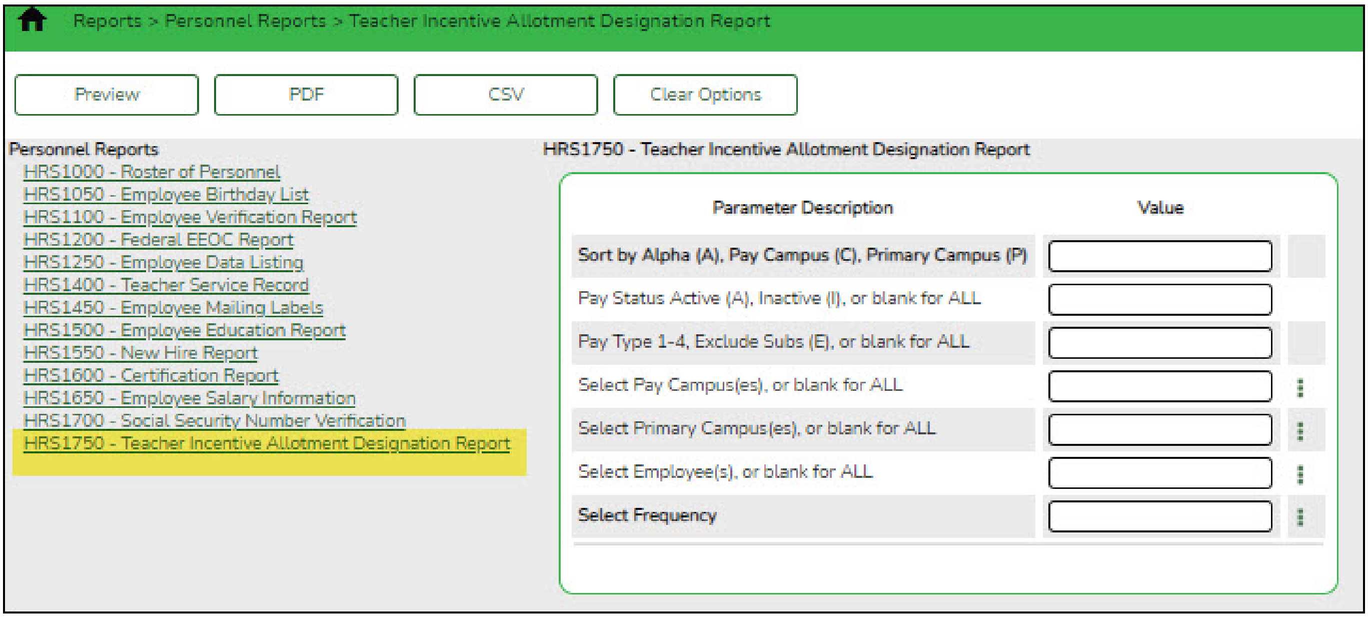
Personnel > Reports > Personnel Reports

❑ Added the **Creditable Year of Service** field to the following reports:

- HRS1100 - Employee Verification
- HRS1250 - Employee Data Listing
- HRS1650 - Employee Salary Information

Personnel > Reports > Personnel Reports > HRS1750 - Teacher Incentive Allotment Designation Report

❑ Added this report to provide a list of employees with their Teacher Incentive Allotment Designation codes and descriptions.



Personnel > Reports > Payroll Information Reports > HRS5250 - 1095-B Forms

❑ Per IRS requirements, updated the 1095-B form/instructions and all 1095-B functionality to support the 2021 tax year.

❑ Removed transmitter control code (TCC) validation from the ACA file creation process.

Personnel > Reports > Payroll Information Reports > HRS5255 - 1095-C Forms

❑ Per IRS requirements, updated the 1095-C form/instructions and all 1095-C functionality to support the 2021 tax year.

❑ Removed transmitter control code (TCC) validation from the ACA file creation process.

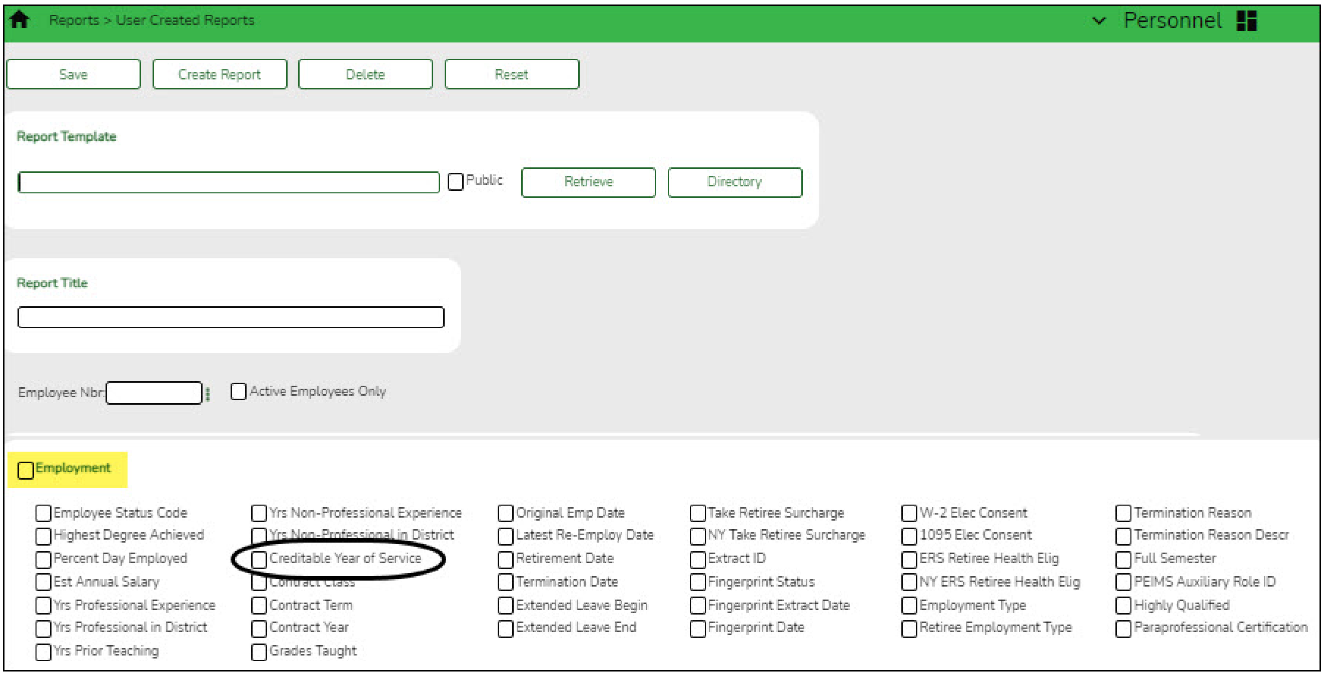
Personnel > Reports > TRS Reports

❑ Corrected the issue that prevented the following reports from being generated:

- HRS4300 - Health Insurance Participation Report
- HRS8900 - Employee Data (ED)
- HRS8905 - Regular Payroll (RP)

Personnel > Reports > User Created Reports > Personnel

❑ Added the **Creditable Year of Service** check box to the **Employment** section.



Purchasing > Inquiry > GL Inquiry > GL Account Summary

❑ Corrected the spelling of Revenue in the Estimated and Realized Revenue column headings on the report preview and PDF.

Purchasing > Maintenance > Create/Modify Requisition

❑ Modified the **Refresh Totals**, **Calculate Amounts**, and **Calculate Percent** links to correctly calculate amounts and percentages when creating a requisition that has one line item with multiple accounts. This change is also effective for the Uniform Account Distribution.

Purchasing > Reports

❑ Corrected the email content (subject/body) to mirror the letter case entered by the user. Previously, all letters were converted to uppercase.

- REQ1450 - Print Purchase Orders
- REQ1500 - Reprint Purchase Orders
- REQ2000 - Request for Quotation Report

Warehouse > Reports > Warehouse Reports > BWH1450 - Print Purchase Order Form & BWH1500 - Reprint Purchase Order Form

❑ Corrected the **PO Signature** button pop-up window to display and function as intended.

EmployeePortal

Release Date: 12/10/2021 **ASCENDER Update**: 6.0400

❑ Modified the program to ensure that the applicable Employee/Supervisor reminder emails are sent daily around 6:00 AM.

EmployeePortal > Inquiry > Calendar Year to Date & W-2 Information

❑ Added the following **FFCRA Payment** fields for the 2021 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.

EmployeePortal > Inquiry > W-2 Information

❏ Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2021 tax year.

EmployeePortal > Inquiry > 1095 Information

❏ Per IRS requirements, updated the 1095-B/1095-C forms/instructions and all 1095-B/1095-C functionality to support the 2021 tax year.

EmployeePortal > Leave Requests

❏ Modified leave requests to display as follows:

- Leave requests with an *Approved* or *Pending Approval* status are displayed on the employee homepage calendar and the Leave Requests page, and can be edited.
- Leave requests with an *Import into Payroll* or *Processed* status are displayed on the employee homepage calendar and the Leave Requests page, and cannot be edited.

Note: All employee leave requests in the above statuses are displayed as read-only on the supervisor's homepage calendar.

❏ Added the **Outlook Calendar** and **Google Calendar** links to leave approval emails allowing employees to add approved leave requests as Outlook/Google calendar events.

❏ Corrected the program to prevent duplicate leave requests from being displayed under **Unprocessed Leave Requests** and on the homepage calendar.

EmployeePortal > Travel Reimbursement Requests > Travel Requests

❑ Added maximum length limits to various fields.

❑ Corrected the issue that caused all inline error messages to be displayed upon accessing the page.

EmployeePortal > Travel Reimbursement Requests > Approve Travel Requests

❑ Corrected various functionality and user interface issues including the select all check box and the document attachments icon to improve the user experience.

MemberPortal

Release Date: 12/10/2021 **ASCENDER Update**: 6.0400

MemberPortal > Login

❑ Corrected the Oops error page to display MemberPortal instead of EmployeePortal.

MemberPortal > Forgot Password

❑ Modified the functionality and user interface to meet ASCENDER portal standards.

MemberPortal > Budget Revision Request & Reimbursement Request

❑ Corrected the program to ensure that all approvers in an approval path receive automated email notifications for pending budget or reimbursement requests.

❑ Corrected the **Module** column in the database to display the originating page name for submitted requests.

MemberPortal > Manage Users

❏ Corrected various user interface issues in the Unsaved Data Warning pop-up window.

❏ Corrected the **Module** column in the database to display GRT2160 Manage Users when adding or updating grant type information for a user.

Update: 6.0350

ASCENDER 6.0350

Release Date: 11/12/21 **ASCENDER Update**: 6.0350

Payroll > Payroll Processing > TRS Processing > Extract

❏ Corrected the issue that prevented the extract from being processed. This issue occurred if the logged-on user had a work email address listed on the Personnel > Maintenance > Staff Demo > Demographic Information or District Administration > Maintenance > Non-Employee pages.

Update: 6.0200

ASCENDER 6.0200

Release Date: 9/28/21 **ASCENDER Update**: 6.0200

❏ Updated the color contrast across all ASCENDER Enterprise applications for ease of readability.

❏ Modified the portals to meet WCAG 2.0AA accessibility standards.

- CareerPortal
- EmployeePortal
- MemberPortal

Accounts Receivable > Maintenance > Credit Memo

❏ Corrected the program to properly change an invoice status from open to closed when a credit memo is applied to zero out the invoice. Previously, the invoice status remained open and was still displayed on the Customer Statement and Detail Aging reports.

Finance > Utilities > Fiscal Year Processing

❏ Modified the Out of Balance Correction utility and the FIN1600 - Batch Process Balance Error Listing to correctly report out of balances.

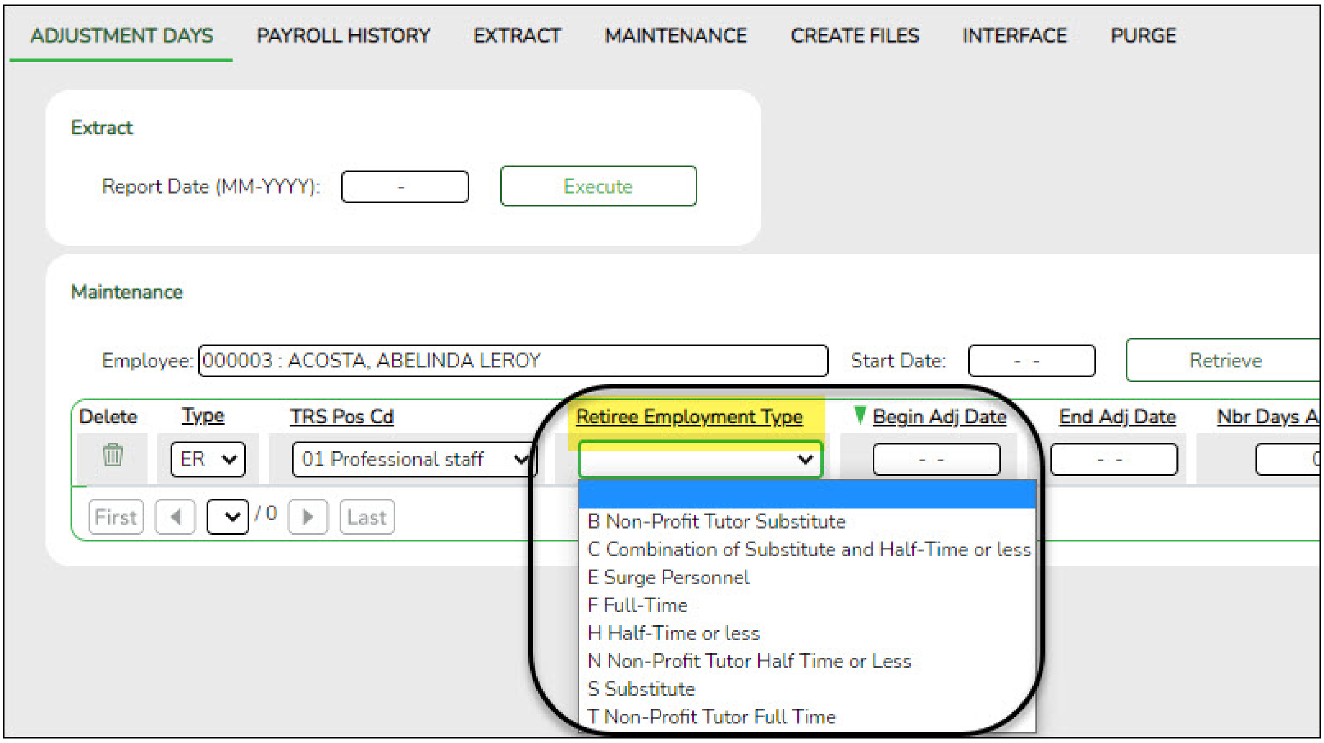
Payroll > Payroll Processing

❏ Corrected the issue that caused the Retiree Pension Gross to be updated with an incorrect amount.

Payroll > Payroll Processing > TRS Processing > Adjustment Days

❏ Added the **Retiree Employment Type** field. This field is only enabled for ER records. The drop down contains the following values:

- *B - Non-Profit Tutor Substitute*
- *C - Combination of Substitute and Half-time or less*
- *E - Surge Personnel*
- *F - Full-Time*
- *H - Half-time or less*
- *N - Non-Profit Tutor Half Time or Less*
- *S - Substitute*
- *T - Non-Profit Tutor Full Time*



Payroll > Payroll Processing > TRS Processing > Extract

❑ Modified the program to allow multiple ER20 records to be extracted for an employee based on the value in the TRS **Retiree Exception** field in the job history. ER20 records will be extracted per Primary Job and per Retiree Exception. Any extra duty pay (XTRA job) that is not attached to the job with the Retiree Exception will be reported with the Primary Job.

Payroll > Payroll Processing > TRS Processing > Maintenance

❑ Modified the program to allow multiple ER20, ER25, and ER27 records to be entered and saved for an employee.

❑ Added the following options to the **Retiree Employment Type** drop down for ER20, ER25, and ER27 records:

- *B - Non-Profit Tutor Substitute*
- *E - Surge Personnel*
- *N - Non-Profit Tutor Half Time or Less*
- *T - Non-Profit Tutor Full Time*

Payroll > Next Year > Copy NYR Tables to CYR

❏ Corrected the issue that prevented some tables from being copied over even though they were selected.

Payroll > Utilities > TRS Maintenance > Employment After Retirement (ER)

❏ Modified the program to allow multiple ER20, ER25, and ER27 records to be entered and saved for an employee.

❏ Added the following options to the **Retiree Employment Type** drop down for ER20, ER25, and ER27 records:

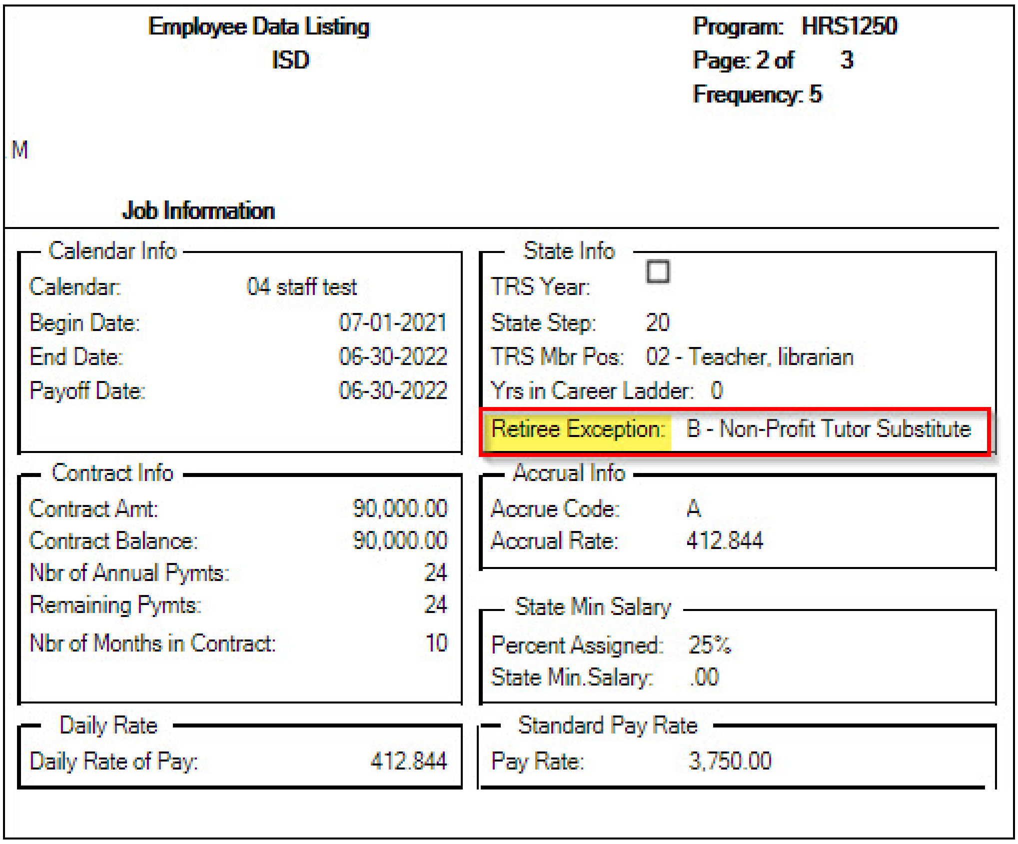
- *B - Non-Profit Tutor Substitute*
- *E - Surge Personnel*
- *N - Non-Profit Tutor Half Time or Less*
- *T - Non-Profit Tutor Full Time*

Payroll > Utilities > Import WorkJournal Requests

❏ Corrected overtime and straight overtime calculations for pay type 2 employees.

Payroll > Reports > Personnel Reports > HRS1250 - Employee Data Listing

❏ Added the **Retiree Exception** field to the **State Info** section on the report.



Employee Data Listing
ISD

Program: HRS1250
Page: 2 of 3
Frequency: 5

M

Job Information

Calendar Info

Calendar:	04 staff test
Begin Date:	07-01-2021
End Date:	06-30-2022
Payoff Date:	06-30-2022

State Info

TRS Year:	☐
State Step:	20
TRS Mbr Pos:	02 - Teacher, librarian
Yrs in Career Ladder:	0
Retiree Exception:	B - Non-Profit Tutor Substitute

Contract Info

Contract Amt:	90,000.00
Contract Balance:	90,000.00
Nbr of Annual Pymts:	24
Remaining Pymts:	24
Nbr of Months in Contract:	10

Accrual Info

Accrue Code:	A
Accrual Rate:	412.844

State Min Salary

Percent Assigned:	25%
State Min.Salary:	.00

Daily Rate

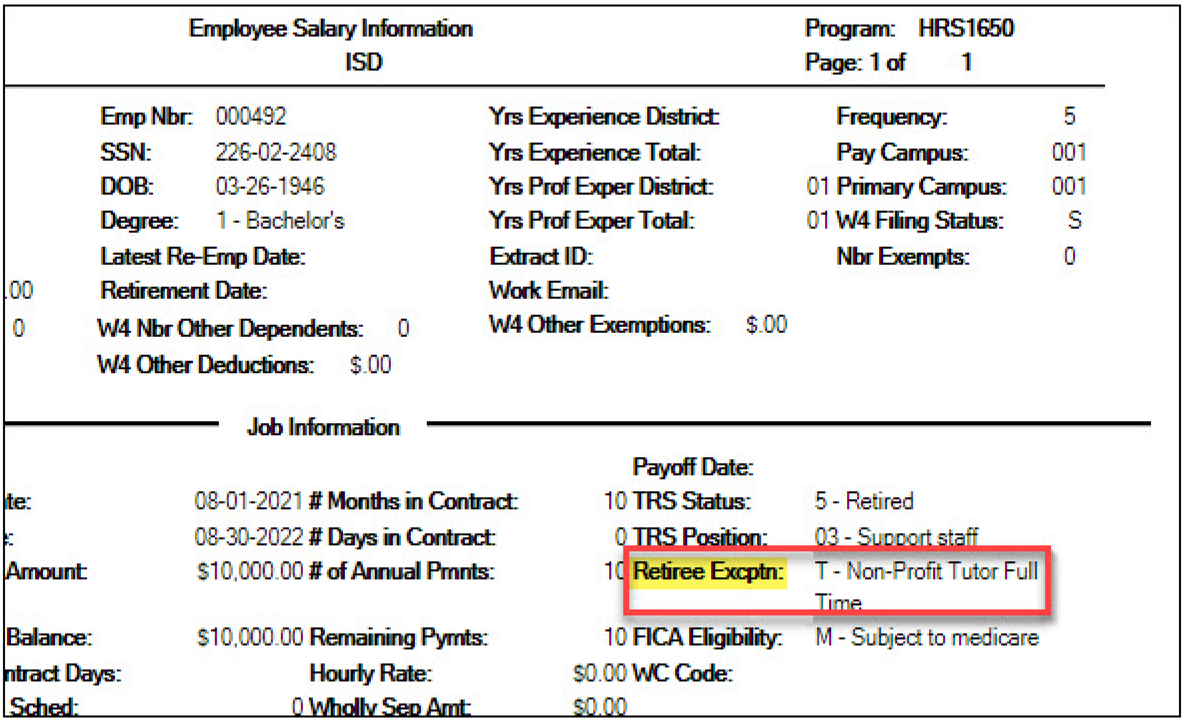
Daily Rate of Pay: 412.844

Standard Pay Rate

Pay Rate: 3,750.00

Payroll > Reports > Personnel Reports > HRS1650 - Employee Salary Information

❑ Added the **Retiree Excptn** (Retiree Exception) field to the Job report.



Employee Salary Information
ISD

Program: HRS1650
Page: 1 of 1

Emp Nbr: 000492
SSN: 226-02-2408
DOB: 03-26-1946
Degree: 1 - Bachelor's
Latest Re-Emp Date:
.00 Retirement Date:
0 W4 Nbr Other Dependents: 0
W4 Other Deductions: $.00

Yrs Experience District:
Yrs Experience Total:
Yrs Prof Exper District:
Yrs Prof Exper Total:
Extract ID:
Work Email:
W4 Other Exemptions: $.00

Frequency: 5
Pay Campus: 001
01 Primary Campus: 001
01 W4 Filing Status: S
Nbr Exempts: 0

Job Information

Payoff Date:
te: 08-01-2021 # Months in Contract: 10 TRS Status: 5 - Retired
: 08-30-2022 # Days in Contract: 0 TRS Position: 03 - Support staff
Amount: $10,000.00 # of Annual Pmnts: 10 Retiree Excptn: T - Non-Profit Tutor Full Time
Balance: $10,000.00 Remaining Pymts: 10 FICA Eligibility: M - Subject to medicare
ntract Days: Hourly Rate: $0.00 WC Code:
Sched: 0 Wholly Sep Amt: $0.00

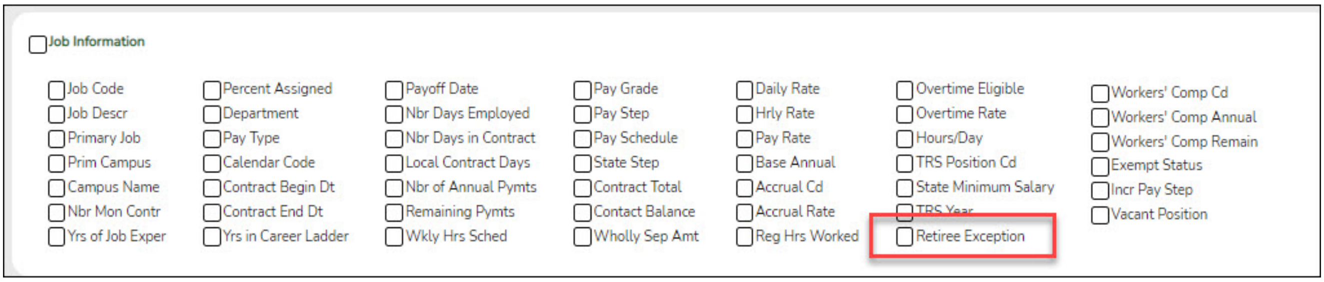
Payroll > Reports > TRS Reports > HRS8910 - Employment After Retirement (ER)

❑ Modified all reports (ER20, ER25, and ER27) to include the TRS Retiree Exception codes and descriptions.

❑ Corrected the issue that prevented the report from being generated.

Payroll > Reports > User Created Reports

❑ Added the **Retiree Exception** check box to the **Job Information** section.



Personnel > Tables > Job/Contract > Job Codes

❑ Corrected the issue that prevented the selected **Time Option** code description from being displayed on the report.

Personnel > Tables > WorkJournal

❑ Corrected the functionality of the **Enable WorkJournal Time for Pay Types** options. Previously, these options were not functioning as intended, and all pay type 2 and 3 employees were available for WorkJournal purposes in EmployeePortal.

Personnel > Tables > WorkJournal > Options

❑ Corrected the program to remain in the same frequency when time conversion table updates are saved and errors are generated.

❑ Corrected various user interface issues to improve the user experience.

Personnel > Reports > Personnel Reports > HRS1250 - Employee Data Listing

❑ Added the **Retiree Exception** field to the **State Info** section on the report.

Personnel > Reports > Personnel Reports > HRS1650 - Employee Salary Information

❑ Added the **Retiree Excptn** (Retiree Exception) field to the Job report.

EmployeePortal

Release Date: 9/28/21 **ASCENDER Update**: 6.0200

❑ Updated the background image on the Login page.

❑ Modified the program to automatically sync WorkJournal and Leave workflows for Alternate Approvers.

EmployeePortal > Homepage Calendar

❑ Modified the program to disable the WorkJournal menu and the **WorkJournal** button on the Add Request Type pop-up window when the **WorkJournal** option is unselected under **Enable** on the Payroll > Tables > District EP Options > EmployeePortal Options page.

EmployeePortal > Travel Requests

❏ Corrected the program to reference the account codes tied to a submitted travel request in order to determine the appropriate approval path.

❏ Removed the **Location Locking** functionality for extended travel requests.

❏ Corrected the status (enabled/disabled) of the **Retrieve** button when entering and clearing **Date** fields.

EmployeePortal > WorkJournal

❏ Corrected the program to automatically retrieve data on the page when a value is selected in the **Pay Frequency** and **Work Week Start Date** fields. If the user manually enters the **Work Week Start Date**, they must tab out of the field in order to retrieve data on the page.

❏ Corrected the program to prevent users from saving overlapping time entries. For example, if a user saves a time entry from 8:00 AM to 4:00 PM, then another time entry can only be saved if it is before 8:00 AM or after 4:00 PM.

❏ Corrected the issue that caused the total hours worked calculation to be incorrect when the **Percent of Hour** was not set up for 100% in the Time Conversion Table on the Personnel > Tables > WorkJournal > Options tab.

❏ Corrected the program to display the **Total Hours** field on the **Weekly Totals** row after the **Leave** field.

Update: 6.0105

EmployeePortal

Release Date: 9/12/21 **ASCENDER Update**: 6.0105

EmployeePortal > Login

❏ Corrected the issue that prevented some employees from creating a new account or logging in to their existing account.

Update: 6.0100

ASCENDER

Release Date: 9/3/21 **ASCENDER Update**: 6.0100

Business Known Issues

❏ Modified the program to create a End User License Agreement (EULA) for ASCENDER. Users must accept the agreement in order to proceed with account creation and/or first log in and on an annual basis.

- ParentPortal
- StudentPortal
- TeacherPortal
- EmployeePortal
- CareerPortal
- MemberPortal
- ASCENDER Enterprise

Approval Summary

❏ Added pending approvals from the Grants and Projects > Maintenance > Approval Dashboard page to the Approval Summary list.

Approval Summary

# Pending	ID/Freq	Approval Type
0	C	Finance > Approve Budget Amendment
0	7	Finance > Approve Budget Amendment
5		Grants & Projects > Approval Dashboard
0	C/4	Payroll > Approve CIP Transaction
1	C/5	Payroll > Approve CIP Transaction
0	C/6	Payroll > Approve CIP Transaction
0		Payroll > Self-Service Payroll Approval
0		Personnel > Self-Service Demographic Approval
0	C/4	Position Management > PMIS Payroll Rejections
0	C/5	Position Management > PMIS Payroll Rejections
0	C/6	Position Management > PMIS Payroll Rejections
0		Purchasing > Approve Bundle Requisitions
0		Purchasing > Approve Requisitions
0		Purchasing > Next Year Approve Requisitions
0	1	Warehouse > Approve Inventory Restock Requisitions
0	1	Warehouse > Approve Warehouse Requisitions

Grants and Projects > Tables > Manage Users

❑ Corrected the issue where changes were made to an existing user's Member or Grant Type access, and then when the user tried to log on to MemberPortal, they were prompted to change their password even though no password changes were made.

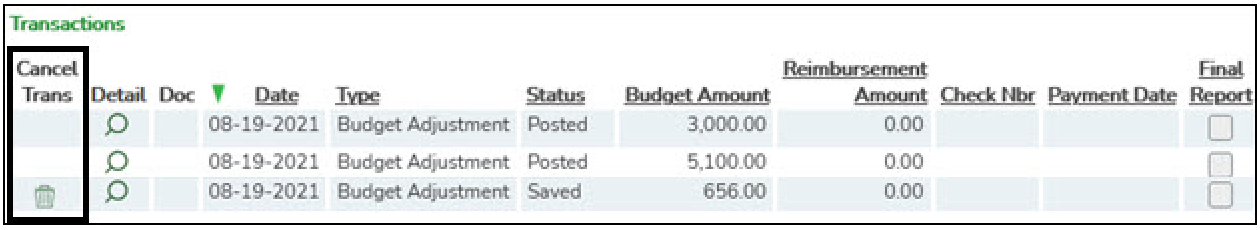
Grants and Projects > Maintenance > Member Grants > Grant Maintenance

❑ Added validation for submitting a reimbursement request with zero values for final approval.

❑ Corrected an issue where a check was voided and reposted and the new final reimbursement check was set to a Pending status; however, instead of restricting new reimbursements from being submitted, the Grant Maintenance record reopened allowing new reimbursement requests to be submitted.

❑ Corrected the issue that required users to first click the **Save** button and then the **Submit** button instead of just clicking the **Submit** button to submit a budget revision or budget adjustment request.

❑ Added the **Cancel Trans** column under the **Transactions** section allowing users to click the trashcan icon to cancel applicable transactions. Only transactions with a Pending, Returned, or Saved status can be canceled.

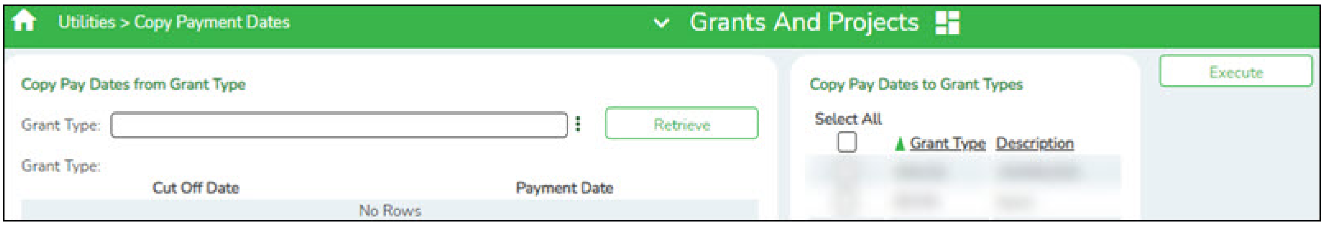


Transactions

Cancel Trans	Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Check Nbr	Payment Date	Final Report
			08-19-2021	Budget Adjustment	Posted	3,000.00	0.00			
			08-19-2021	Budget Adjustment	Posted	5,100.00	0.00			
			08-19-2021	Budget Adjustment	Saved	656.00	0.00			

Grants and Projects > Utilities > Copy Payment Dates

❑ Added this page to copy payment dates from one grant type to another grant type. Payment information can be copied to multiple grant types.



Grants And Projects > Reports > SSA Grants Reports

❑ Enabled the **Preview** button for all SSA Grants Reports to allow users to preview a report prior to downloading the Excel or PDF file.

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

❑ Modified the **Grant Year (YYYY) or blank for ALL** parameter to only accept a four-digit numeric value.

❑ Modified the sorting on the PDF file to match the sorting on the Excel file by sorting from newest to oldest when sorting by **Year**. Previously, the PDF sorted from oldest to newest.

Grants And Projects > Reports > SSA Grants Reports > GP1100 - Grant Payment Transaction Report

❏ Corrected various user interface issues to improve the user experience.

❏ Corrected the report to generate the appropriate error when the **From Date** parameter value is greater than the **To Date** parameter value.

❏ Modified the approval date (**Appr Date**) format (MM-DD-YYYY) to match on both the Excel and PDF files.

Grants and Projects > Reports > SSA Grant Reports > GP1200 - Past Final Date Without Final Report

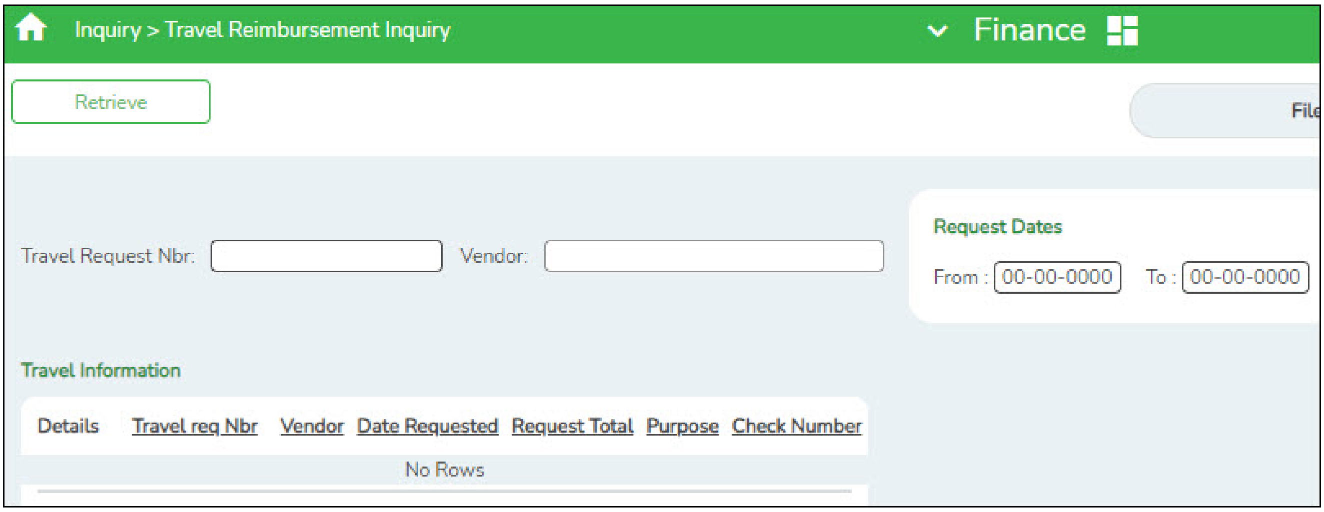
❏ Corrected various user interface issues to improve the user experience.

❏ Modified the CSV file to display the complete **Grant Year** column heading. Previously, only **Year** was displayed.

❏ Corrected the document Help path for GP1200 - Past Final Date Without Final Report to link to the Production environment.

Finance > Inquiry > Travel Reimbursement Inquiry

❏ Added this page to retrieve a listing of travel reimbursement requests for each vendor. Only requests that have been processed in Finance are displayed.



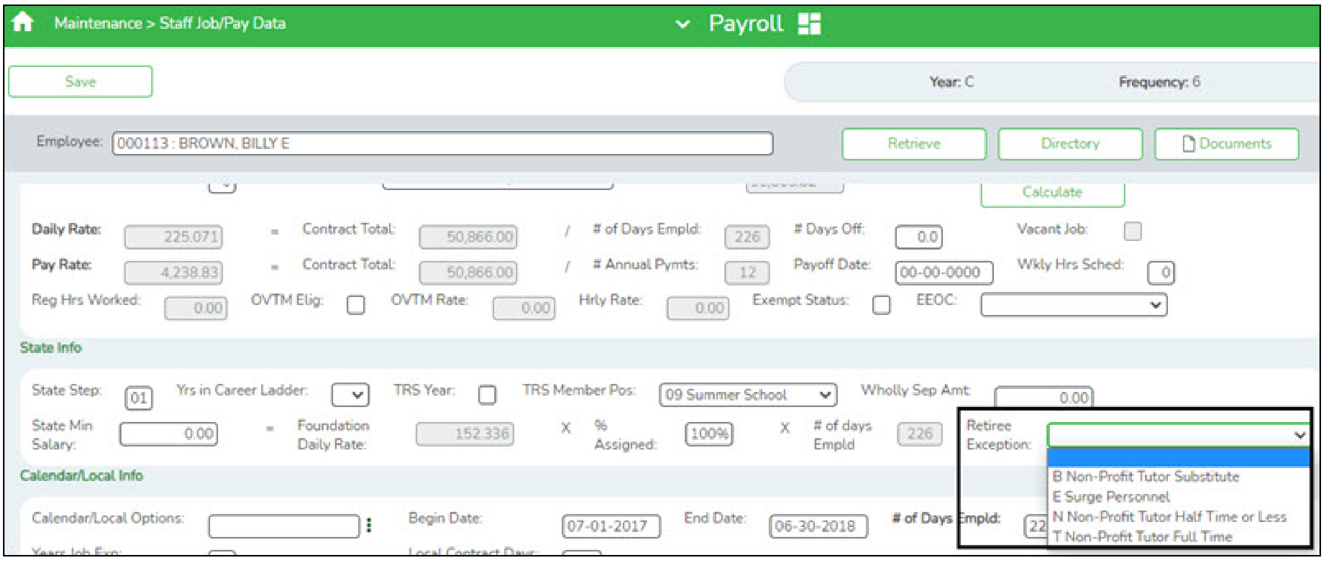
Finance > Maintenance > Check Processing > Void Check

❑ Modified the program to properly handle voided reimbursement check transactions with the **Final Report** check box selected from the Grants and Projects application.

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

❑ Added the **Retiree Exception** field to select the applicable retiree exception code. This field is used in conjunction with the **Employment Type** and **Take Retiree Surcharge** fields to determine whether or not to calculate a retiree surcharge for the employee. A value cannot be saved if the employee's **TRS Status** is set to *1 Eligible* on the Pay Info tab. This field is disabled for XTRA jobs. The drop down contains the following values:

E Surge Personnel
B Non-Profit Tutor Substitute
N Non-Profit Tutor Half Time or Less
T Non-Profit Tutor Full Time



Payroll > Maintenance > Leave Account Transaction > Staff Leave Maint

❑ Corrected the program error that occurred when attempting to enter leave for an employee without assigned leave codes. Now, an informational error message is displayed instead.

Payroll > Payroll Processing > Run Payroll

❑ Modified payroll calculations to properly handle TRS Retiree Employment exception processing.

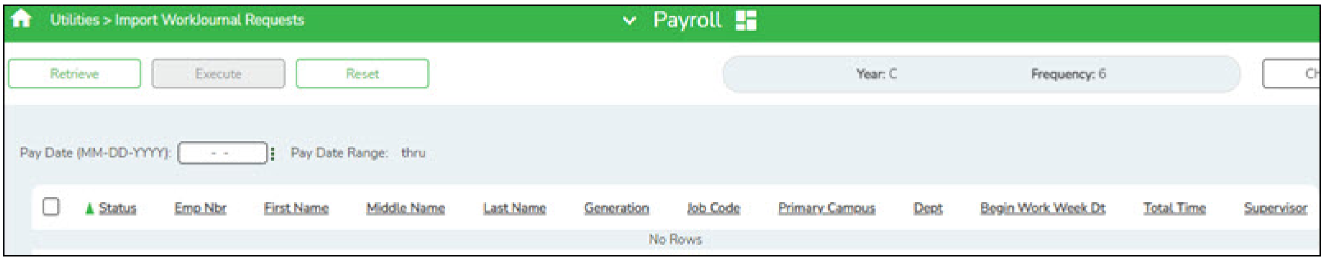
❑ Modified the program to allow the maximum dependent care deduction to be $10,500 for calendar year 2021.

Payroll > Payroll Processing > Payroll Adjustments > Check Issue

❑ Modified the program to allow the maximum dependent care deduction to be $10,500 for calendar year 2021.

Payroll > Utilities > Import WorkJournal Requests

❑ Added this page to import approved employee WorkJournal requests for each of the work weeks in the selected pay period that were submitted through EmployeePortal. This process creates a pay transmittal to be processed by payroll.



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

❑ Modified the program to only allow the **Use for ST OT** check box to be enabled for S-type extra duty codes. In addition, this check box can only be selected for one S-type extra duty code.

Personnel > Tables > WorkJournal > Options

❑ Corrected various user interface issues to improve the user experience.

Personnel > Tables > WorkJournal > Admin

❏ Corrected various user interface issues to improve the user experience.

EmployeePortal

Release Date: 9/3/21 **ASCENDER Update**: 6.0100

NEW: WorkJournal

WorkJournal

The new WorkJournal feature allows pay type 2 and 3 employees to create and submit timesheet entries for time (hours) worked on a specific day. This feature offers a summary/detailed view of WorkJournal requests to both employees and supervisors. The following functionality was added:

EmployeePortal > WorkJournal

❏ Added this page to allow employees to create and submit timesheet entries for time (hours) worked on a specific day.

EmployeePortal > Supervisor > Approve WorkJournal

❏ Added this page to allow supervisors to approve/return employee WorkJournal requests.

EmployeePortal > Supervisor > Calendar

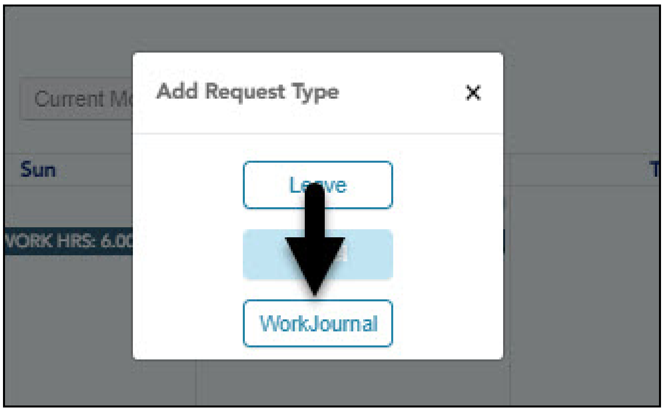
❏ Modified the page to display the logged-on supervisor's employees' WorkJournal entries (total hours worked) for each day.

EmployeePortal > Login

❑ Corrected the issue that prevented some users with multiple pay frequencies in the current year from being able to log on to EmployeePortal.

EmployeePortal > Homepage Calendar

❑ Added the **WorkJournal** button to the Add Request Type pop-window to allow users to create a WorkJournal request.



❑ Modified the program to display the total hours worked for each WorkJournal entry on a day, up to three entries. If an entry is more than five hours for a job code that has an automatic lunch set up in Personnel, the amount of time (in minutes) is automatically deducted from the total time worked for that job code on that work day.

EmployeePortal > Travel Requests

❑ Corrected the program to display all validation errors at the same time upon clicking the **Save** button. This allows the user to correct all errors in one instance.

❑ Corrected the issue that caused blank mileage start and end times to be recorded and displayed as 12:00 AM when the **Require Start/End Times** check box was unselected on the Finance > Tables > District Finance Options 2 page.

EmployeePortal > Approve Travel Requests

❑ Corrected the sequence of the cursor focus when tabbing through the page.

MemberPortal

Release Date: 9/3/21 **ASCENDER Update**: 6.0100

MemberPortal > Login

❑ Modified the program to require the user to reset their password upon expiration.

❑ Corrected the **Help** button to display the question mark icon to the left of the word Help instead of below.

❑ Corrected the issue where changes were made to an existing user's Member or Grant Type access, and then when the user tried to log on to MemberPortal, they were prompted to change their password even though no password changes were made.

MemberPortal > Grant List

❑ Corrected the Document Attachments functionality in the transaction details pop-up window to display/hide the paper clip icon accordingly as documents are added/removed.

MemberPortal > Budget Revision Request

❑ Corrected various user interface issues to improve the user experience.

❑ Corrected the Grant ID lookup to automatically refresh the page and retrieve the data for the selected grant ID.

MemberPortal > Reimbursement Request

❑ Corrected various user interface issues to improve the user experience.

❑ Corrected the Grant ID lookup to automatically refresh the page and retrieve the data for the selected grant ID.

MemberPortal > Manage Users

❑ Corrected various user interface issues to improve the user experience.

❑ Corrected the issue where changes were made to an existing user's Member or Grant Type access, and then when the user tried to log on to MemberPortal, they were prompted to change their password even though no password changes were made.

Back Cover